

# Commercial Rental Tracker Plus™

## Complete Rental Management System

### User Guide

**Welcome!** Thank you for downloading your copy of *Commercial Rental Tracker Plus™* from SpiritWorks Software Inc.

*Commercial Rental Tracker Plus* was developed with the small businessperson in mind. **This program promotes greater work productivity**, because you will be able to spend less time keeping track of all your bookkeeping requirements.

All information used in *Commercial Rental Tracker Plus* is stored in interrelated database files. Each database contains a set of information, called a record, such as contacts, tasks, schedules, etc. In some databases you will create lists of charges, etc. You will be able to pick from these lists when completing new records.

*Commercial Rental Tracker Plus* contains **easily searchable databases** of all your business functions, including income, expenses, contacts, etc. You can also print out **several different reports** from each database to keep in your filing system.

By using *Commercial Rental Tracker Plus*, you not only keep track of your tenants and unit details, but you can easily find out who is late with their rent and prepare tax forms. **Through better organization of your rental information you can realize better time management.**

You can use the software for ten days (or ten uses) before needing to purchase a registration number. To register *Commercial Rental Tracker Plus*, go to <http://productivity-software.com/commercial/register.html>

When you receive your registration info, click the **Register** button on the Welcome screen and fill in your user name and the registration number. You will then be entitled to updates, technical support and can use the software indefinitely.

Almost every window in this software has a **Help** button which will display a window that contains all the most current information about that component of the software. The Help window also contains a **Tutorial** for each component.

Your questions, comments, suggestions and bug reports are always welcome. Please send your email to: [support@productivity-software.com](mailto:support@productivity-software.com).

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# Getting Started

*Information about common features and backing up your data.*

## **Guided Tour**

We highly recommend taking a quick tour of the software's functionality by clicking on the **Guided Tour** button located near the top right corner on the welcome screen. This tour will familiarize you with the software program in general.

## **Import or Delete Sample Data**

All information used in *Commercial Rental Tracker Plus* is stored in several interrelated database files. Each database contains sets of information, called records, such as contacts, tasks, schedules, etc. Prior to using the software for the first time, it is highly recommended you import the sample data.

We recommend that you import the sample data provided with this software, and experiment with it for a little while, allowing you to understand how you will enter data into the records in the various databases with your own data.

To import the sample data, click **Guided Tour** on the Welcome screen and then click the **Import Sample Data** button.

To delete the sample data, click **Guided Tour** on the Welcome screen and then click the **Delete Sample Data** button.

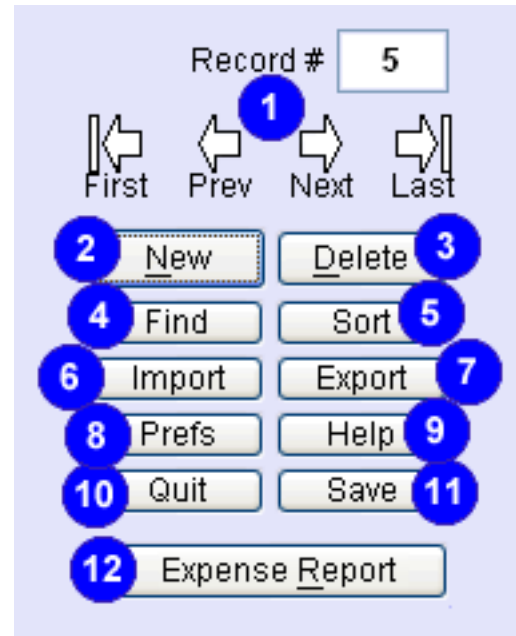
## Common Features

The most common features of *Commercial Rental Tracker Plus* are similar in each component. These features include:

(1) The **Prev** and **Next** arrow buttons move between the records in the database. The **Record #** field displays the number of each record in the database. The number of a record may change if you delete a record or sort the database. Click the **Last** button to see how many records there are.

(2) Click the **New** button to create a new record. To remove one or more records from the database, click the **Delete** button (3). You will then be asked if you want to delete **All** records or **Just this one** (only the current record).

The **Find** button (4) is used to search for text on any record in that particular component (or database). The **Sort** button (5) sorts the records by certain fields in the database.



To update or import records from a different version of the software, click the **Import** button (6). To export data from any database for archiving or updating purposes, click the **Export** button (7).

The **Prefs**, or Preferences button (8) opens a new window where you can change visual aspects of the software, and change date, time and currency formats.

There is a **Help** button (9) on nearly every screen which opens a new window with context sensitive information about that screen and all the features of that component.

The **Quit** (10) button simply takes you out of the program itself. In registered versions of the software, you will be reminded to backup your data. Closing the last window will also quit the program, but you will not be reminded to backup your data.

You can save the current database by clicking the **Save** button (11). Data is normally saved automatically when going to another record or closing a window.

Each component has a **Report** (12) button in the lower right corner of the screen that opens a new window with report options or output.

In the lower left corner of each component's main window is a **Commercial Rental Tracker Menu** button which you will use to access the other components.

## **Backing Up Data**

It is always a good idea to backup your data on a regular basis, either daily or weekly. There are four ways to back up your data in *Commercial Rental Tracker Plus*. In any registered version of the software, whenever you click the **Quit** button, you are asked if you want to create a backup of your records. Essentially, this is the same as clicking the **Backup Records** button on the Welcome screen.

By creating a backup of your records, you will be able to restore your data to another copy of the software, should your computer or the software fail for some reason. The backup file will also be useful when updating to a new version of the software. The file has the extension .bak and will be created in the directory that you specify.

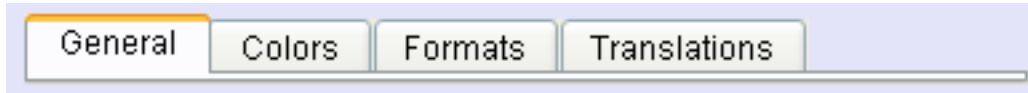
Another way to backup your records is by clicking the **Export** button in any of the components of the software, and saving the resulting export files to a folder on your computer.

The final method is to copy the entire program folder onto a CD/DVD. In Windows, the program folder can be found in your Documents folder. On the Mac, look in the Applications folder. This is the least desirable method as it takes up much more disk space and if you want to update to a newer version of the software, you need the backup or export files.

The recommended backup method is to save the .bak file to your computer and then copy the backup (or export) files to another disk, at least once a week, so that if you need to reformat your drive for some reason, the backup files are not on that drive.

## Tabs and Preferences

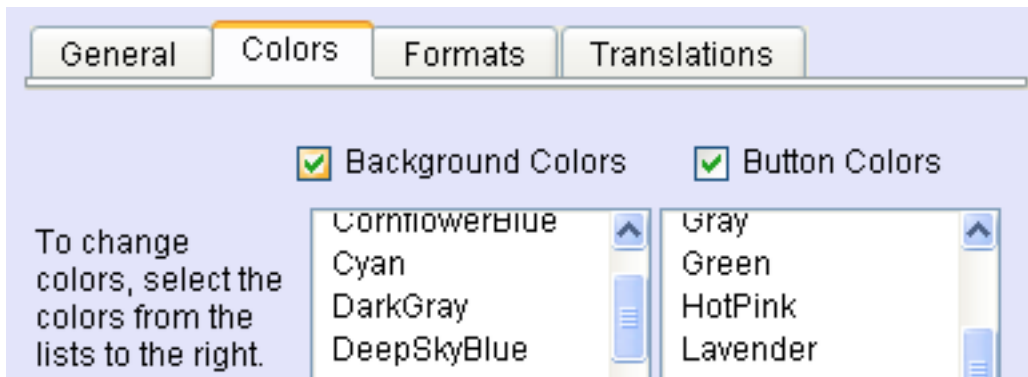
Tabs are special buttons which allow you to see more information or options in a window. You will find tab buttons in many components of the software.



In the Preferences window, for example, the buttons pictured above allow you to choose which options are displayed at any one time, making the screen much less cluttered. By clicking each tab button you hide and show specific fields and/or buttons.

Here are the features of the Preferences window:

### Color Preferences



Reveal the two color lists by choosing the **Background Colors** and/or the **Button Colors** options near the top of the screen.

You can change the background color for each component (or all windows) of this program by choosing a color from the **Background Color** list. The background color, of the component you clicked the **Prefs** button in, will automatically change to the new color. Use the up and down arrow keys to change the colors after selecting the first one. Choose any color by selecting the Other... option in the **Background Colors** list.

Change the button colors by choosing a color from the the **Button Color** list. The button colors, of the component you clicked the **Prefs** button in, will automatically change to the new color. Use the up and down arrow keys to change the colors after selecting the first one. You can choose any color by selecting the Other... option in the **Button Color** list.

Play around with these selections until you find a color combination that is pleasing to your eyes.

By default, each component has the same colors, but you can set different colors for each component, so it is easier to tell the components apart, by turning off the **Use these colors in all windows** option.



Click the **Set Desktop Cover** button to choose a color or pattern to hide other program windows, and the icons on your Desktop, for a full screen effect. You can choose from one of the preselected patterns, choose a **Custom Pattern**, a solid **Black** or a solid **Custom Color**. If you change your mind, click the **Clear Desktop Pattern** button to remove the desktop cover. Click the **Return to Colors** button to exit the Desktop Cover selection screen.

Click the **Rounded Appearance** button to make the buttons and fields more rounded and three dimensional.

To change the highlight color, click **Highlight Color**, hold down the Control (or Command) key and then click a color from the **Background** colors list.

Click the **Default Settings** button to return all settings back to their default values.

Click the **Save** button to save your new Preferences.

Click the **Help** button to find out about all the options in the Preferences window.

Click the **Close Window** button to close the Preferences window.

## **Formats**

You can choose different formats by clicking the **Formats** tab.

The **Time Format** defaults to **AM/PM**, but if you would want times displayed in 24 hour format, click **24 Hrs**.

The **Date Format** defaults to **MM/DD/YY** (ie, 12/25/09), but if you would want dates displayed in European format (ie, 25/12/09) click the **DD/MM/YY** option.

The **Distance Format** allows you to change appropriate labels to **Kilometers** or **Miles**.

You can also change the **Liquids Format** to **Gallons**, **Liters** or **Litres**.

The **Add leading zeros to numbers in reports and invoices** option is designed to help line up numbers in reports and invoices, and creates columns of numbers that look like this:

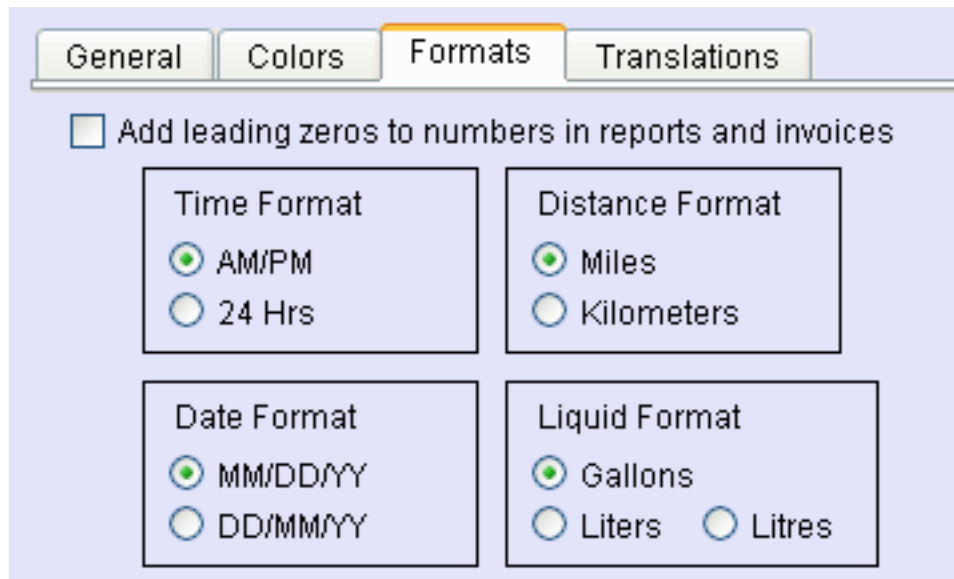
\$1002.34  
\$0035.79  
\$0123.45

## **International Preferences**

Enabling the **International Version** option changes the spelling of check to cheque, sets print margins for A4 paper, and adds VAT or GST tax form reports to Expense Tracker's Reports.

The **Address Preferences** button allows you to specify what Districts are called in your country and which Postal Code type is used. The **Address Format** menu determines the order and format of the City, State or District fields in all printed addresses.

You can change **Monetary Symbols** and **Tax Types** in the **General** section of the Preferences window.



## **General Preferences**

Click the **General** tab to set more preferences.

You can set the **Monetary Symbol & Format** to something other than the dollar sign (\$), if you use a different one, by picking a new symbol from the menu, or by choosing Other... from the menu. You can use up to 4 characters for the monetary symbol. The new symbol will be displayed in all invoices and reports. Use the next menu to choose your preferred currency format (\$1,234.56, \$1.234,56 or 1.234,56\$)

Change your local **Tax Type** from **Sales Tax** to **VAT, GST** or any other, by using the menu provided. You can specify the **# of decimal places** to be displayed in numbers.

Specify the start and end times for Schedule Tracker reports (when the **Show All Times** option is selected) in the **In Schedule Tracker list times between** section.

The **Open components in a different window?** button allows you to choose if you want each component to open in a new, separate window. Opening new components in new windows sometimes creates too many open windows for some people. Some components, such as the Universal Calculator, always open in a new window.

The **When opening program (after registering)** section allows you to choose if you want the program to open to the **Welcome window**, where you can choose the component you want to use from the pull-down menu (in versions that contain several components), OR if you want to **Go to the record last visited before quitting** (ie, the one you were working on when you clicked the **Quit** button), OR if you want the **Daily Briefing Report** displayed when you open the program. These options only works in registered versions of the software.

When you click any of the **Quit** buttons (after registering the software) you can specify if you want an **Auto Backup** done. The choices are **Ask First, Always** (you will be asked to specify the name and location of the backup file), or **Never** (you will not be asked again when quitting).

## **Keyboard Shortcuts**

Many buttons have a keyboard equivalent, also known as a keyboard shortcut.

Shortcuts are indicated by the letter of the button that is underlined. Just press the letter on your keyboard to activate the button. If you have selected the **Rounded Appearance** option in Preferences, you will not see any underlined letters in the buttons. These shortcuts will still work though.

You may need to press the Alt key (or the Command key on the Macintosh) and then the shortcut letter.

In any field that you can type in, you can also use the standard Cut (Ctrl + x or Command + x), Copy (Ctrl + c or Command + c) and Paste (Ctrl + v or Command + v) keyboard shortcuts. Select All (Ctrl + a or Command + a) is also fully supported, but Undo (Ctrl + z or Command + z) is not. Sometimes it works and sometimes it doesn't.

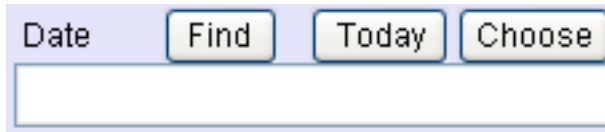
You can also use (Ctrl + s or Command + s) to save your data at any time and (Ctrl + w or Command + w) to close any window . Closing the last window will quit the program but without saving any changes. (Ctrl + q or Command + q) will also quit the program plus save any changes.

In windows where there is a **Find** button, you can use (Ctrl + f or Command + f) to open the Find/Search dialog. Also in windows where there is a **New** button, you can use (Ctrl + n or Command + n) to create a new record (in this case Alt + n is the same). Finally, in windows where there is a **Help** button, you can use (Ctrl + h or Command + h) to open the help window (and in many cases Alt + h does the same thing).

See the **Keyboard Shortcuts** section in each individual Help window for more keyboard equivalents.

## Data Input

Some data can be input directly into a field such as the **Notes** field. Most fields require going through a dialog of some kind. This prevents you from entering data that would cause errors, and so you can pick from a list rather than having to retype.

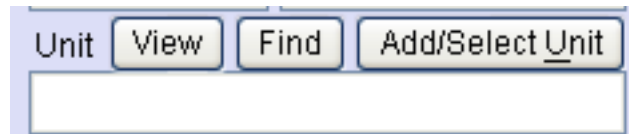


Most **Date** fields have two buttons above them for various methods of data input.

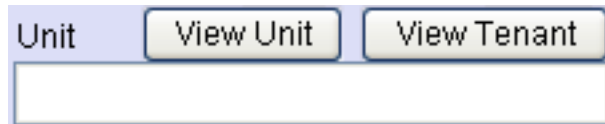
You can click the **Today** button to input the current date. Clicking the **Edit** button, or the field itself, produces a dialog which asks you to enter a date.

By clicking on the **Choose** button you can choose a date from a calendar.

Many fields have **Add/Select** buttons above them which allow you to pick an entry from a list. You can also **Add, Delete** or **Modify** entry names from this window.



There is often a **Find** or **Go To** button above these fields that will help you quickly locate the first or last record associated with that field. There is sometimes a **View** button which take you directly to the related record in another component of the software. For instance, you will find **View Tenant** and **View Unit** buttons.



In any field that you can type in, you can use the standard Cut (Ctrl + x or Command + x), Copy (Ctrl + c or Command + c) and Paste (Ctrl + v or Command + v) keyboard shortcuts. Select All (Ctrl + a or Command + a) is also fully supported, but Undo (Ctrl + z or Command + z) is not.

You can also use (Ctrl + s or Command + s) to save your data at any time and (Ctrl + w or Command + w) to close many windows. Although records are normally saved when going to another record, or closing the component it is often a good idea to click the **Save** button after making changes, just to be safe.

## **Reports**

Various reports can be generated from each component of *Commercial Rental Tracker Plus*. Look for a **Report** button in the lower right corner of the main window of each component.

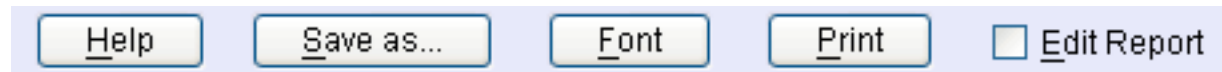
The Reports for each component are somewhat different because of the nature of the data collected and the type of report to be generated. In most cases there is an intermediate screen where you can choose **Options** and **Sort Orders** and pick other specific criteria for your report.

In some cases, you go directly to the report screen where you have a few **Options** and **Sort Order** choices for your report.

There is a **Help** button on each option window with more about the report options.

In most cases you can choose a range of **Dates** for your report.

On the bottom of the report window, you will find the following buttons (plus a **Close Window** button which is not pictured):



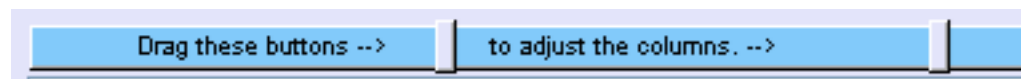
**Save As...** saves the report as a text file for archiving or exporting to a spreadsheet or word processor for formatting, etc.

**Font** allows you to specify the size and font of the text in the report.

**Print** prints the report – you may need to print some reports in Landscape mode (horizontally as opposed to the normal vertical orientation).

**Edit Report** allows you to make changes to the report before printing or exporting – when this button is unchecked (in its normal position) you can click the main line of each record's data to go directly to that record.

There is a row of buttons, above the report's output field, (pictured below) that allow you to change the width of the columns (the tab stops) in the report. Just drag any of the little rectangles left or right to make the report more readable.



## **Updating the Software**

When updating the software, make sure the software is backed up completely by creating a .bak file. You can do this by clicking the **Backup Records** button on the Welcome screen. You can also copy the software to a CD if you wish. Then delete the old copy of the software from your computer.

You should never have more than one copy of the software on any computer. If you do, the program can get confused about which file to write to and it will appear that the data you are adding disappears when you open the program the next time.

After deleting the old copy, download a new installer from <http://productivity-software.com/rental/dl2.html> and then install the new version on your computer. Next Register the new copy and then click **Restore Records** on the Welcome screen and locate your .bak file.

## **Multiple Users**

*Commercial Rental Tracker Plus* is not designed to run on a server. Each user needs to have a copy of the software on their computer. They can then export their records periodically and then send them to another user for importing. This is a fairly simple process. The export files are very small and can be emailed or sent across a network. Each user needs to have their own registration number. Only one person can make changes to the records.

## **Other Helpful Things to Know**

You can save any or all of the text in the Help window for each component of the software, as either an HTML or text file. Just click the **Save As** button found at the bottom of the Help window. You can then print the text file from any word processing program or view the HTML file within your web browser.

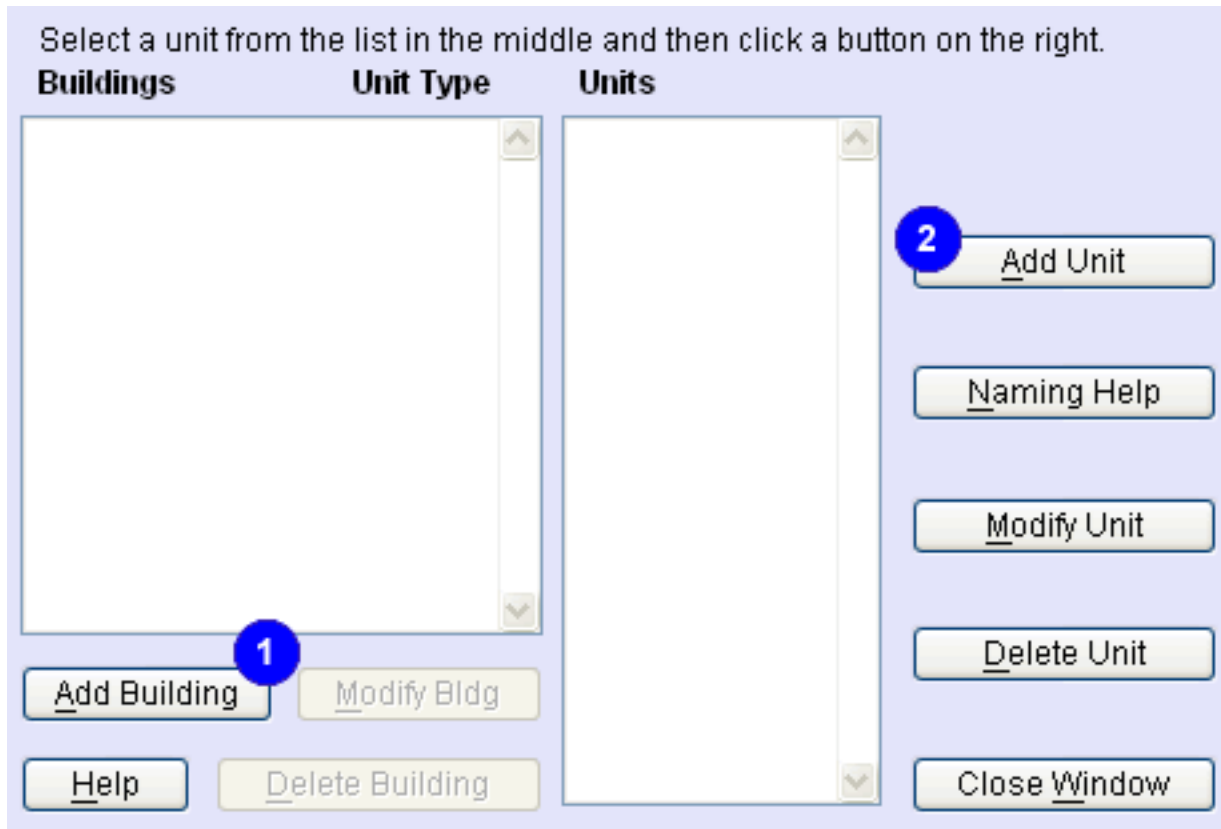
Occasionally during a save or a crash, the current database will get corrupted. Fortunately, the file is always saved with an .rev~ extension first. If a component suddenly disappears from the menu, locate a file with an .rev~ extension within the application's folder (in Windows look in your My Documents folder). If you find a file with the same name and without the .rev~ extension, simply delete the .rev file and remove the ~ from the other file. For example, if contacts.rev were to get corrupted, you will find a duplicate file name but with .rev~ called contacts.rev~. Delete the contacts.rev and rename contacts.rev~ to contacts.rev.

If you have any questions or comments about the software, feel free to email us at: [support@productivity-software.com](mailto:support@productivity-software.com)

# Commercial Rental Unit Tracker

First create Unit records for each of your units. Start by choosing **Commercial Rental Unit Tracker** from the **Commercial Rental Tracker Menu**. Then click the **New** button.

A new Rental Units window will open that lists your **Buildings** and **Units**.



In this software, **Units** are buildings or parts of buildings that are available for rent.

**Buildings** are logical collections of Units. If you have one or more multiple unit buildings, click **Add Building (1)** in the lower left corner of the Rental Units screen. You will be asked for the name of the building and then you will be asked to pick a unit type. The choices are **Suite, Office, Room, Unit or Other**.

## Adding Units and Buildings

**To add a Unit to a Building**, click the name of an existing **Building** and then click **Add Unit(s)** (in image below). You will be asked if you want to add one or more units to the building. If your units are sequentially numbered (ie, 1,2,3,4,5) then you can use the **More than one** feature. If they are not sequential or have alpha designations (ie, 1a, 2b, cottage, etc.) then you must choose the **Just one** button.

Select a unit from the list in the middle and then click a button on the right.

Buildings	Unit Type	Units
Apartment Bldg	Apt.	

2 Add Unit(s)

If you choose the **More than one** feature, you will be asked for the number of the first and last unit in the building. You will next be asked for the street address, which will be appended with the apt or room number and entered into the first line of the Address field. Next you will be asked for the City, State and Zip which will also be added to the Address field on the new Rental Unit records.

If you choose the **Just one** option, you will only be asked for the name of the new unit. Then you will need to fill in the rest of the required information for the new Commercial Unit Tracker record.

**To add a Unit** that is not part of a Building, make sure there is no building selected in the Rental Units window and then click **Add Unit**. You will be asked for the **Unit Identification** or name of the new unit. Use an abbreviated form of the address (ie, 1234 Main) or a nickname. Then you will need to fill in the rest of the required information for the new Commercial Unit Tracker record.

**Note: We suggest you create all unit records first and then assign Units to the Commercial Tenant Tracker records as you create them.**

Unit Identification	Find Unit	Unit or Building Type	Photo
<input type="text"/>		2	
Address		Manager	Add/Select Manager
1		3	

Enter the mailing **Address (1)** of the unit, choose the **Unit or Building Type (2)**, and then click the **Add/Select Manager (3)**. If all your units are managed by the same person you can save this step until you have all your unit records created. You will be asked if the manager is the same for all units. After creating a new manager, click the **Manager Details** button in the Managers/Owners window and fill in the address and other information.

The screenshot shows a software interface for managing tenants. At the top, there are tabs for 'Tenant', 'Description', 'Assets', 'Expenses', 'Notes/History', and 'Unit Cost'. Below the tabs, there are several input fields and buttons. Callout 4 points to a 'Tenant' input field with a 'View' button next to it. Callout 5a points to the 'Base Rent' input field. Callout 5b points to the 'Rent based on' section, which has radio buttons for 'Rentable' (selected) and 'Usable', followed by 'Sq. Ft.'. Callout 5c points to the 'Usable Sq. Ft. Rate' input field. Other visible fields include 'Rent Due Date', 'Lease Exp. Date', 'Yearly Lease', 'Expenses Paid Last Month', and 'Utilities Paid Last Month'. There are also buttons for 'Vacate Unit' and 'Add/Select Tenant'.

Each unit can have one or more **Tenants** (4) assigned to it. The **Base Rent** (5a) is calculated based on either **Rentable** or **Usable** area (5b) times the rates you assign (5c).

When you choose a **Lease Type** (6), certain expenses will be automatically added to the monthly rent.

To create a new Commercial Unit Record, begin by clicking the **New** button (7).

You can print out all the information about your units by creating a **Unit Report** (8).

The screenshot shows a 'Lease Type' selection interface. At the top, there is a dropdown menu labeled 'Lease Type' with a blue circle callout 6 next to it. Below the dropdown, there is a 'Record #' field with the value '1'. At the bottom, there is a grid of buttons: 'New' (with callout 7), 'Delete', 'Find', 'Sort', 'Import', 'Export', 'Prefs', 'Help', 'Quit', and 'Save'. At the very bottom, there is a 'Unit Report' button with a blue circle callout 8 next to it.

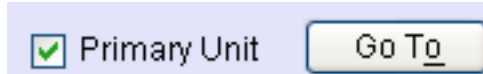
Enter the total area of the building into the **Building Sq. Ft.** field (2a) (If you prefer Sq. M. then click Prefs, then Formats, then Kilometers.) and the useable area for the Unit into the **Useable Sq. Ft. for this Unit** field (2b). Next click the **Description** tab (see 1 below) and enter the total common area of the building into the **Com. Sq. Ft.** field (2c).

You can also add any number of photos of the building by clicking the **Photo** button above the **Unit or Building Type** menu (at the top of the window). *Photos are not stored in the software and must remain in the original location on your computer to be displayed.*

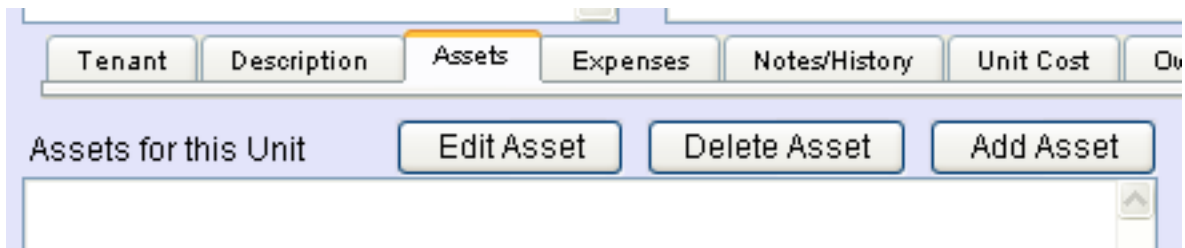
## Description

Fill in the other fields in the **Description** section including: **Zoned (3a)**, **Roof (3b)**, **Foundation (3c)**, **Walls (3d)**, **Heating & A/C Type (3e)**, **Lighting (3f)**, **Reconditioning Details (4)** and a **Description (5)** of the building. You might use this last field for an advertisement about the building. There are also three options to choose from: **Build to Suit? (6a)**, **Can Sublet (6b)**, or **Options? (6c)** (to buy at the end of the lease?).

At the bottom of the screen is a **Primary Unit** option with a **Go To** button next to it. Each building, whether it is just one unit or many units, should have a Primary Unit. The Unit Cost, Ownership and Property Tax, A/C Service Date and Liability Insurance information only need to be entered once on the Primary Unit record for the building. You can go directly to the **Primary Unit** record for a Building by clicking the **Go To** button.

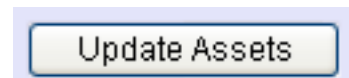


## **Assets**



Click the **Assets** tab to assign furniture, appliances, and other assets to the rental unit. You will be asked for a Description, Make and Model, and a Serial Number. You will then be asked if you want to continue working in **Asset Tracker** or return to **Commercial Unit Tracker**. If you continue working in Asset Tracker, when you are finished, return to the unit record by choosing Commercial Unit Tracker from the **Commercial Rental Tracker Menu**.

The **Update Assets** button automatically adds and updates all the assets (from Asset Tracker records) in the **Assets for this Unit** field.



## Expenses

The screenshot shows the 'Expenses' section of the software. At the top, there is a tabbed menu with 'Expenses' selected. Below the menu, there are two main sections. The left section is titled 'Expenses to be paid by Tenant' and contains a large empty text area labeled '2'. Below this is another section titled 'Utilities & Other Charges (add to Tenant's record)' which contains a large empty text area labeled '3' and a 'View' button. The right section contains several input fields: 'Property Taxes Paid to' (labeled '4a'), 'Amount Paid per Year' (labeled '4b'), 'A/C Service Date' (labeled '5') with a 'Choose' button, 'Liability Insurance Paid to' (labeled '6a'), 'Amount Paid' (labeled '6b') with radio buttons for 'per Year' and 'per Month' (labeled '6c'). A blue circle with the number '1' is positioned above the 'Expenses' tab.

In the Expenses section, the **Expenses to be paid by Tenant (2)** and **Utilities & Other Charges (3)** are displayed (you choose these in [Commercial Tenant Tracker](#)).

You can indicate who the **Property Taxes are paid to (4a)**, the **Amount Paid per Year (4b)**, the next **A/C Service Date (5)**, who your **Liability Insurance is Paid to (6a)**, the **Amount paid (6b)** and if you pay **Per Year or Per Month (6c)**.

You can also choose if you want the **Expenses** or **Utilities Distributed** among all the Units or if they each will pay separately.

Distribution

% of Expenses

% of Utilities

## Notes/History

The screenshot shows a software interface with a tabbed menu at the top. The tabs are labeled 'Assets', 'Expenses', 'Notes/History', 'Unit Cost', and 'Ownership'. The 'Notes/History' tab is currently selected and highlighted. Below the tabs is a large text input field labeled 'Notes'. To the right of this field is a button labeled 'Show Unit History'.

Click the **Notes/History** tab and enter any notes about the unit in the field provided. Here you will find the **Unit History** field which lists each Tenant that has occupied the unit, and when they moved in and vacated it.

## Unit Cost

The screenshot shows the 'Unit Cost' tab selected in the software interface. The tab is labeled 'Unit Cost' and has a blue circle with the number '1' next to it. Below the tabs are several input fields, each with a blue circle containing a number: 'Purchase Date' (2a), 'Purchase Price' (2b), 'Reconditioning' (2c), 'Amount Financed' (3a), 'Interest Rate' (3b), 'Loan Months' (3c), 'Left to Pay' (3d), 'Payment' (3e), 'Balance Due' (3f), 'Maturity Date' (3g), 'Add Payment to Expense Tracker' (6), 'Sale Date' (4a), 'Sale Amount' (4b), and 'Market Value' (5).

Click the **Unit Cost (1)** tab and fill in the **Purchase Date (2a)**, **Purchase Price (2b)**, **Reconditioning Cost (2c)**, **Amount Financed (3a)**, the **Interest Rate (3b)**, number of total **Loan Months (3c)**, months **Left to Pay (3d)**, the mortgage **Payment (3e)** and the **Balance Due (3g)**. Note the **Maturity Date (3g)** if one applies. Then you can use the **Add Payment to Expense Tracker (6)** button to

create a mortgage payment in Rental Expense Tracker. There are also fields for the **Sale Date (4a)**, **Sale Amount (4b)**, and **Market Value (5)**.

The information in this section can be **Password Protected** by clicking the option provided.

Password Protect

## Ownership

Click the **Ownership (1)** tab to add the name(s) of the **Owner(s)** and their percent ownership, for tax reporting purposes, by clicking the **Add/Select Owner (2)** button in the **Overview (3)** section. Click **Show Contributions (4)** and then **Add Contribution** to specify how much money an owner has contributed to the project. Click **Show Distributions (5)** and then **Add Distribution** to specify how much money an owner has taken out of the project. These numbers are all totaled in the **Overview (6)**..

Terminology for reports  Owner  Partner  Investor  Member

You can specify what **Terminology** you want to use for reports by choosing between **Owner, Partner, Investor and Member**. This choice effects all your units. Another preference you can set here is if you **Always want to Go To the Primary Unit** when you click the Unit Cost or Ownership tab buttons.

Always Go To Primary Unit

Owners and Managers are grouped together since the owner and manager might be the same person. You can add contact and other tax information about the owner or manager by choosing one from the list and then clicking the **Owner Details** button in the Owners / Managers window.

## Tenant Information

The screenshot shows a software interface for managing tenant information. At the top, there are tabs: 'Tenant' (highlighted with a blue circle 1), 'Description', 'Assets', 'Expenses', 'Notes/History', and 'Unit Cost'. Below the tabs, there are several input fields and buttons. On the left, there are fields for 'Rent Due Date' (2b) and 'Lease Exp. Date' (2c). Below these is a 'Multiple Tenancy' checkbox (3) and a 'Tenant' field (4) with a 'View' button. In the center, there is a 'Vacate Unit' button and an 'Add/Select Tenant' button (2). Below the 'Add/Select Tenant' button is a list box (2a). On the right side, there are fields for 'Yearly Lease' (2d), 'Base Rent' (2e), 'Expenses Paid Last Month' (5a), and 'Utilities Paid Last Month' (5b). At the bottom, there are radio buttons for 'Rent based on' with 'Rentable' selected (6a) and 'Usable' unselected. Below this are fields for 'Usable Sq. Ft. Rate' (6b), 'Com. Sq. Ft. Rate' (6c), and 'Total Rent Paid Last Month' (5c).

Click the **Tenant** tab (1) and choose or create a Tenant by clicking the **Add/Select Tenant** button (2). The list of tenants comes from Commercial Tenant Tracker. You can add, modify or delete tenant records from this dialog. When you click **Choose Tenant**, the **Tenant** (2a), **Rent Due Date** (2b), **Lease Exp. Date** (2c), **Yearly Lease** (2d), **Base Rent** (2e), **Expenses** and **Utilities** (in the Expenses section) are all added automatically.

The **Base Rent** (2e) is calculated based on either **Rentable** or **Usable** area (6a) times the rates you assign (6b & 6c).

After clicking **Create Receipt** on a Rental Income Tracker record, the **Expenses Paid Last Month** (5a), **Utilities Paid Last Month** (5b) and **Total Rent Paid Last Month** (5c) on the Commercial Unit and Tenant Tracker records will all be filled in for you.

## **Multiple Tenancy**

When the **Multiple Tenancy** button (3) is checked, the **Tenants** field (2a) expands to accept any number of tenants. Just click the **Add/Select Tenant** button for each tenant.

Each of these Tenants must have a record in Commercial Tenant Tracker. If you want to combine tenants on one Tenant record, use the **Additional Lease Name(s)** field in the **Information** section.

If you need to remove a tenant from the list, click the tenant's name and then click the **Delete Tenant** button that appears.


Go directly to the Tenant's record by clicking the tenant's name and then the **View** button which appears above the **Tenant** field.

Go to the tenant's record to add or edit information by clicking the **View** button (4) above the Tenant field. If the **Multiple Tenancy** button is checked you need to click on a tenant to show this button.

## **About Managers and Owners**

Each unit should be assigned a **Manager** by clicking the **Add/Select Manager** button in the top section. Each unit should be assigned an **Owner** by clicking the **Add/Select Owner(s)** button in the **Ownership** section. The **Manager** may be the same person as the **Owner**. For this reason, Owners and Managers are grouped together in the Owners / Managers window.

Select one or more Owners from the list and then click a button on the right. To deselect a name, click it again.



**Choose Owner**

**Add an Owner**

**Owner Details**

**Modify Owner**

**Delete Owner**

**Import/Export**

**Close Window**

Click the **Add an Owner** button to add an Owner to the list.

You can **Modify** (change the name, in case of misspelling or remarriage) or **Delete** a **Manager** or **Owner** by choosing a name and then clicking the appropriate button in the Owners / Managers window. You can also export the list of **Managers** and **Owners**, with all their contact information, to a text file.

Record contact and tax information about the person by clicking the **Owner Details** button. You will see a section for **Addresses, Phones, Notes** and **Account**.

The **Account** section is used to record payments to or from the **Owner** as determined by a Property Management Invoice (PM Invoice). See the **Property Management Invoice Options**

Posted	Income	Expenses	DueOwner	DatePa
10/14/11	\$5,897.15	\$0	\$5,897.15	

section in the **Expense Tracker Reports** section of this document.

After creating a **Property Management Invoice** you will see a **Reconcile Owner's Account** button in the Invoice window. If there is an amount due TO the owner, a Rental Expense Tracker record will be created. If the amount is due FROM the owner, an Other Income Tracker record will be created.

When you pay (or collect) a payment, modify the **Date** and the **Amount** paid (or collected) and the Owner's **Account** field will be updated.

To access the Owner's **Account** field, click **Select Owner** in the Expense Report Options window (or Unit Tracker's Tax Info section), select the Owner, click **Owner Details**, and then click **Account**. You will find a **Create Owner Report** button there which will create an Account Register report or **Print the Owner's Account**.

## To Add Records to Commercial Unit Tracker

1. Click the **New** button. Click **Add Building** or **Add Unit**. Buildings require a unit type. You can add one or more units to a building by selecting the building and clicking the **Add Unit(s)** button.
2. Enter the **Unit Identification**
3. Fill in the **Address** and a **Description**. You should also enter the **Kind of Property**.
4. If you have already created the tenant record, click **Add/Select Tenant** and choose a tenant from the list. The **Rent Total**, **Rent Due Date** and **Lease Exp. Date** will be automatically filled in from the Commercial Tenant Tracker record.
5. Click the **Notes** tab and click **Add/Select Manager**. Add one or pick a Manager from the list, then click the **Choose** button.
6. Click the **Tax Info** tab and click **Add/Select Owner**. Add one or pick an Owner from the list, then click the **Choose** button. Enter the percent ownership. If there is only one owner, enter 100.

## Commercial Unit Tracker's Report Options

<input type="checkbox"/> Show Address	<input type="checkbox"/> Show Unit Cost	<input type="checkbox"/> Show Description
<input checked="" type="checkbox"/> Show Rent	<input type="checkbox"/> Show Manager	<input type="checkbox"/> Show Notes
<input type="checkbox"/> Vacant Only	<input type="checkbox"/> Show Owner(s)	<input type="checkbox"/> Show Unit History
<input type="checkbox"/> Translate	Click a Unit name in the list to go to that record.	

Easily create lists of all your unit records by clicking the **Unit Report** button in the Rental Unit Tracker window.

There are several options to choose from at the top of the Unit Report window. These include: **Show Address**, **Show Rent**, **Show Description**, **Show Unit Cost**, **Show Unit History**, **Show Condition Notes**, **Show Manager**, **Show Owner(s)** and **Vacant Only**.

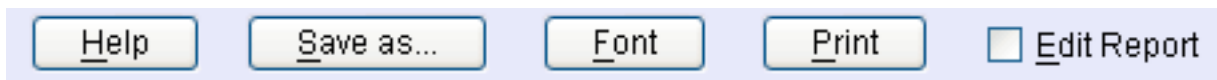
This last option is useful for generating reports of only Unit records that have Tenant fields that are empty or contain the word Vacant.

The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Unit**, **Tenant**, and **Exp Date**. You can report on just one unit or all the units in one building by clicking **Select Bldg** or **Select Unit**.

<b>Sort By</b>		
<input type="radio"/> Tenant	<input checked="" type="radio"/> Unit	<input type="radio"/> Exp Date
<input checked="" type="checkbox"/> All Units	<input type="button" value="Select Bldg"/>	<input type="button" value="Select Unit"/>
<input type="text"/>		

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.

Along the bottom of the report window are five buttons and an **Edit Report** option. The **Close Window** button is not pictured.



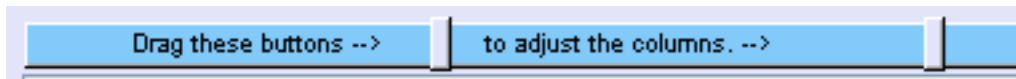
Use the **Edit Report** option to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

The font face, size, and line height of the list can be modified by clicking the **Font** button.

You can print the Unit Report by clicking the **Print** button.

To save the list as a text file for importing into another program click the **Save as...** button.

Click **Help** for more information about the report options.



Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

# Commercial Tenant Tracker

In Commercial Tenant Tracker (accessed by by choosing it from the **Commercial Rental Tracker Menu**) click the **New** button. A Tenants window will open where you can add, modify and delete tenant names. Click **Add Tenant** and enter the **Business, First** and **Last Name** of the new tenant.

The screenshot shows a form for adding a new tenant. It has two columns. The left column contains a 'Business Name' field with a blue circle '1' next to it, and a 'Unit' field with buttons for 'View', 'Find', and 'Add/Select Unit'. The right column contains 'First Name' (2a) and 'Last Name' (2b) fields, and a 'Work Phone' field (3a). A 'Go To Tenant' button is located at the top between the two columns.

## Dates/Charges

You will next be guided through entering the rental information for the new tenant in the **Dates/Charges** section (4) including: **Deposit** amount (5), if the Deposit has been paid (6), the **Lease Exp. date** (7) (enter MTM for month to month rentals), the **Late Charge** (8) (if you charge a daily charge after the late date, enter the primary charge followed by a comma and then the daily charge. For example, if you charge \$25 plus \$5 per day after the Late date, enter \$25,\$5), if the rental period is Weekly, Fortnightly (every two weeks), Multi-month (longer than one month) or Monthly, the **Rent Due on date** (9) (usually the 1st of the month) and the **Rent Late On date** (10).

The screenshot shows the 'Dates/Charges' section of the form. It has three tabs: 'Dates/Charges' (4), 'Information', and 'Expenses'. The form is divided into two columns. The left column contains 'Moved In' (Choose), 'Moved Out' (Choose), 'Lease Exp.' (Choose), 'Rent Due On' (Edit), and 'Rent Late On' (Edit) fields. The right column contains 'Deposit' (5), 'Deposit Details' (6), 'Base Rent', 'Late Charge' (8), and 'Balance Due' fields. There are also input fields for 'Lease Exp.' (7), 'Rent Due On' (9), and 'Rent Late On' (10).

## **Assigning a Unit**

Click **Add/Select Unit (1)** and choose the unit for the tenant. The **Base Rent amount (2)** is automatically calculated based on data from Commercial Unit Tracker. If you have several Tenants in one Unit, you have two options. First you can use the **Additional Lease Name(s)** field (in the **Information** section) to add other tenants to one lease. *Use this field to enter the mailing address for the tenant.*

If each tenant has their own separate lease then click the **Multiple Tenancy** option on the Commercial Unit Tracker record, and add all the Tenants from there.

The screenshot shows a software interface with a top navigation bar containing buttons for 'Unit', 'View', 'Find', and 'Add/Select Unit'. The 'Add/Select Unit' button is circled in blue with the number '1'. Below this is a tabbed interface with 'Dates/Charges', 'Information', and 'Expenses' tabs. The 'Information' tab is active. It contains several input fields: 'Moved In' with a 'Choose' button and a text field circled in blue with '3'; 'Moved Out' with a 'Choose' button and a text field; 'Lease Exp.' with a 'Choose' button and a text field; 'Deposit' with a text field; and 'Base Rent' with a text field circled in blue with '2'. A 'Deposit Details' button is also visible.

Multiple Units for one Tenant is not supported in this software. You can work around this by having multiple Tenant records for the same Tenant (add a middle initial or name to differentiate the tenant records).

Next enter the **Moved In** date (3). The software uses the Moved In date to determine how many months of payments to look for in determining if rent is past due and what the balance due is. So you need to pick the first date that you want to enter the historical data for as the Moved In date.

You can also enter a **Default Moved In** date in the Commercial Tenant Tracker Prefs window (click **Prefs** and then **Tenant Tracker Prefs**) and then enter the actual moved in dates on the individual Commercial Tenant Tracker records. You can also enter the actual moved in date into the **Unit History** field in Commercial Unit Tracker. See **Tenant Tracker Preferences** for more information.

Most people don't want to go back very many months, so they just enter a fairly recent Due Date as the Default Moved In date. So, for example, if you start using the software in March and you want to include historical data for February, then the **Default Moved In** date should be February 1 (or the first day of that rental period).

You can enter the actual Moved In date for recent and future tenants. This date is automatically entered into the **Unit History** field in Commercial Unit Tracker.

The **Balance Due** field is used by the software to keep track of balances due. If the tenant owes money when you create the first Rental Income Tracker record, add the amount due to the **Charges** field manually. After that any amount due will be added automatically when you create a new Rental Income Tracker record for that tenant.

Balance Due

## **Deposit Details**

Click the **Deposit Details (12)** button is located under the **Dates/Charges** tab and shows (or hides) the following buttons and fields:

Deposit  
 Details

**Dep. Paid (1)** is the date the deposit was paid in full.

Record the method of payment by clicking **Cash, Credit Card or Check** (and then entering a **Check #**) (2).

Indicate if the deposit is **Paid, Partially Paid** or **Unpaid** with the buttons provided.

If the **Paid** button is selected then the **Date Ret. (3)** and **Dep. Returned (4)** fields will be shown, where you can record the date you returned the deposit (or any portion) and the amount returned.

Moved Out  Choose

(8)

Dep. Paid  Choose (1)

Check #

Cash  Credit Card  Check (2)

Paid  Partially Paid  Unpaid

Date Ret.  Choose (3) Dep. Returned  (4)

If the **Partially Paid** button (5) is selected then the **Part Pymnt (6)** and **Amount Paid (6)** fields will be shown, where you can record the date you received a partial payment for the deposit and the amount paid.

Cash  Credit Card  Check

Paid  Partially Paid (5)  Unpaid

Part Pymnt  Choose (6) Amount Paid  (7)

Click **Hide Dep. Details (8)** to return to the normal Tenant Dates/Charges screen.

Recurring charges (including Metered Utilities) can be added to the rent each month by clicking **Add/Select Charge**, then selecting a charge and clicking **Choose Charge**. Use **Create Charge** to add new charge types.

Utilities & Other Recurring Charges

## Information

The screenshot shows a software interface with a tabbed menu at the top. The 'Information' tab is selected and highlighted. Below the tabs are several input fields and buttons. The fields are numbered 1 through 10. Field 1 is the 'Information' tab. Field 2 is 'Additional Lease Name(s) & Home Address'. Field 3 is 'Emergency Contact Name'. Field 4 is 'Emergency Number'. Field 5 is 'Email Address'. Field 6 is 'SS# or Tax ID#'. Field 7 is 'Misc 1'. Field 8 is 'Renewal Terms'. Field 9 is 'Misc 3'. Field 10 is 'Other Phones'. There are 'Add More' and 'Change' buttons associated with fields 2, 8, and 9.

There are several other fields in the **Information** section (1) including: **Additional Lease Name(s) & Home Address** (2) (any other information you want added to Tenant Notices and Receipts), **Emergency Contact Name** (3), **Emergency Number** (4), **Email Address** (5), **SS# or Tax ID#** (6), and an **Other Phones** field (10). There are also three **Misc** fields (7, 8 & 9) that you can use to keep track of other information. Click the **Change** button above these fields to change the label on all the records. After importing the sample data, some of labels for these fields will be changed, such as the Renewal Terms (8) field.

The **Add More** button expands the **Additional Lease Name(s) & Home Address** field (2), so you can type several lines into it.

## Expenses

The screenshot shows the 'Expenses' section of a software interface. At the top, there are five tabs: 'Dates/Charges', 'Information', 'Expenses', 'Payments', and 'Notes'. The 'Expenses' tab is selected and highlighted. Below the tabs, there is a section titled 'Expenses to be paid or shared by this tenant' with an 'Add Expense' button. Below that is a large empty text area. Below that is a section titled 'Expenses paid by this tenant' with an 'Expand' button. Below that is a table with four columns and three rows. A blue circle with the number 1 is over the 'Expenses' tab. A blue circle with the number 2 is in the large empty text area. A blue circle with the number 3 is over the 'Add Expense' button. A blue circle with the number 4 is in the middle of the table. A blue circle with the number 5 is over the 'Expand' button.

In the **Expenses** section (1) you can add expense types (from Rental Expense Tracker) to the **Expenses to be paid or shared by this tenant** field (2) by clicking **Add Expense** (3). You can also choose if you want these expenses to be shared (by clicking **% of Expenses**) with other tenants in a building, or if you want **% of Utilities & Other Charges** (listed in the **Utilities & Other Recurring Charges** field in the Dates/Charges section) to be distributed with other tenants in the building.

The screenshot shows the 'Distribution' section of a software interface. It has a title 'Distribution' and two checkboxes: '% of Expenses' and '% of Utilities & Other Charges'. There is a 'Note:' button. Blue circles with numbers 6, 7, and 8 are overlaid on the checkboxes and the 'Note:' button respectively.

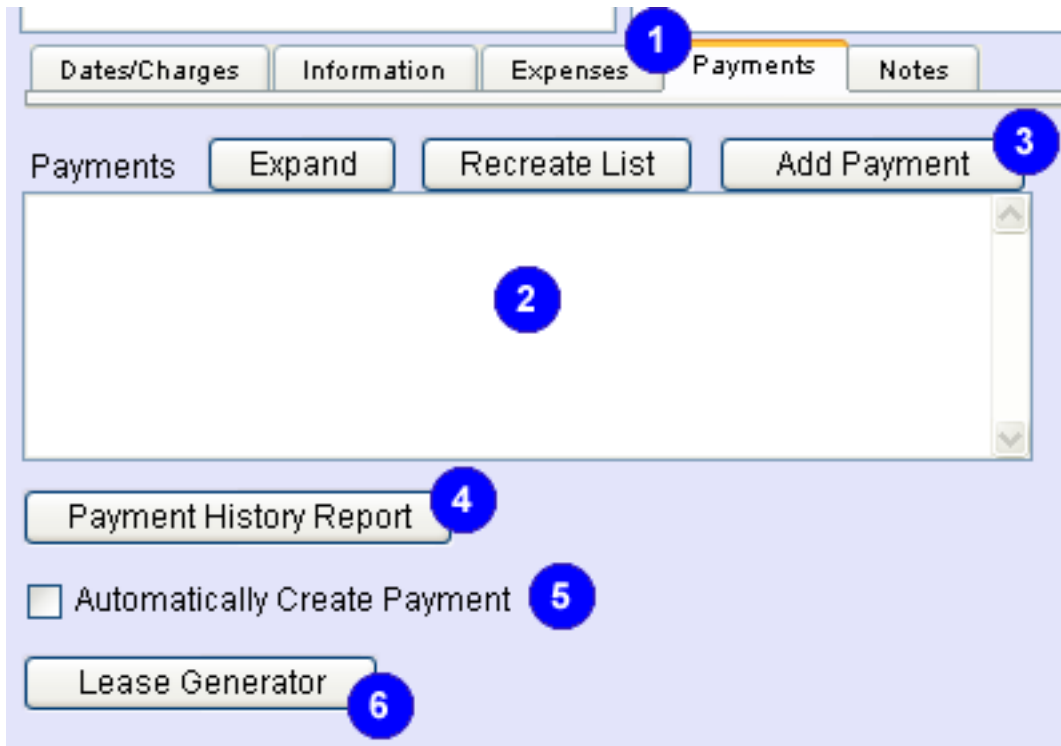
If there is a Property Tax **Amount Paid per Year** in the Expenses section of Commercial Unit Tracker, then "Property Taxes" will appear in the Expenses to be paid... field (2).

If there is a Liability Insurance **Amount Paid** in the Expenses section of Commercial Unit Tracker, then "Liability Insurance" will appear in the Expenses to be paid... field (2).

When **Create Receipt** is clicked in Rental Income Tracker any Expenses from Rental Expense Tracker that are paid will be added to the **Expense paid by this tenant** field (4). The **Expand** button (5) will make this field larger.

## Payments

Payments are automatically added to Commercial Tenant Tracker when the **Create Invoice** button is clicked in Rental Income Tracker. You can view these payments by clicking the **Payments** tab button (1).



You can add payments to the **Payments** field (2) by clicking the **Add Payment** button (3). However in most cases you will want to add payments via Rental Income Tracker.

You can delete a payment by clicking a payment and then clicking the **Delete Payment** button that appears.

When you click a line in the **Payments** field an **Edit Payment** button appears. Clicking this button provides options for editing the **Due Date**, **Amount Due**, **Amount Paid** or the **Date Paid**. Make sure the **Due Date** is an actual beginning of a rental period (or the **Moved In Date**) and make sure the **Due Date** is not a duplicate.

The **Payment History Report** button (4) creates a balance sheet showing all the dates and payments made by the tenant.

If the **Automatically Create Payment** option (5) is enabled, you can click the **ACP** button in Rental Income Tracker to automatically create income records for this tenant and add lines to the **Payments** field. You should only use this feature if you automatically deduct the tenant's rent from their checking account.

Use the **Lease Generator (6)** to create a customized lease from the tenant's record. See the integrated **Help** for more information.

Click the **Expand** button above the **Payments** field (2) to view more lines at once.

If you need to recreate the payment list from the records in Rental Income Tracker then click the **Recreate List** button. You will be asked if you want to Clear the list first or Add payments to the list. If you have deleted records from Rental Income Tracker then choose Add.

To record a **Partial Payment** you can click the **Add Payment** button or go to the last record for the tenant in Rental Income Tracker. Then change the **Payment Date**, enter the **Payment** amount and then click the **Create Receipt** button.

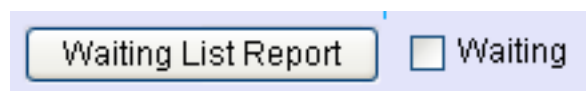
## **Notes**



The screenshot shows a software interface with a horizontal menu bar at the top. The menu items are 'Dates/Charges', 'Information', 'Expenses', 'Payments', and 'Notes'. The 'Notes' tab is currently selected and highlighted with an orange border. Below the menu bar is a large text input field labeled 'Notes' with a small upward-pointing arrow icon in the bottom right corner.

Keep any amount of notes in the **Notes** field. Notes about Metered charges are added to this field and must not be removed.

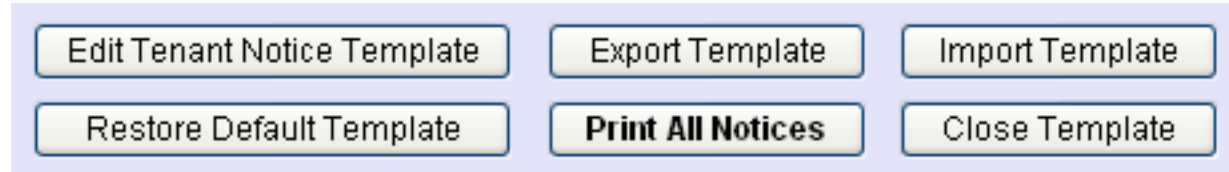
Also in the **Notes** section is a **Waiting** option which is used for potential tenants who have not moved in yet. You can also create a **Waiting List Report**.



The screenshot shows a software interface with a horizontal bar containing a button labeled 'Waiting List Report' and a checkbox labeled 'Waiting'.

## **Notices**

Create **Late Notices (1)** and other **Tenant Notices (2)** by using these buttons. You can print out Notices for all your tenants with a button provided on the subsequent window. You can also modify the notice and import and export notices for future use.



You can print or save the Late or Tenant Notice. Edit the notice by clicking the **Edit Tenant Notice Template** button. You will see placeholder tags for the manager's name, address, etc., the tenant's name and address and a message to edit. Remove any tags that you don't want in the notice, edit the message and then click the **Close Template** button that appears.

Use the **Restore Default Template** button to revert to the original template.

You can export a template for future use by clicking the **Export Template** button. Click **Import Template** to choose a previously saved template to use again.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the [Translations screen in Preferences](#) or consult the translation tips file supplied with this program.

## **Rent Roll Report**

Use the **Rent Roll** button (3) to check to see which tenants are due or late with their rent. You can easily create a new [Rental Income Tracker](#) record by clicking the **Post New Rent** button (4).



Clicking the **Tenant Report** button (5) takes you to the report screen, where there are several options for displaying and printing tenant information.

## **Commercial Tenant Tracker's Report Options**

<input checked="" type="checkbox"/> Phones	<input type="checkbox"/> Notes	<input checked="" type="radio"/> Current Tenants
<input checked="" type="checkbox"/> Personal info	<input type="checkbox"/> Dates / Charges	<input type="radio"/> Past Tenants
<input type="checkbox"/> Show Deposits	<input type="checkbox"/> Deposits Only	<input type="radio"/> Due or Late Tenants
<input type="checkbox"/> Payments	<input type="checkbox"/> Translate	<input type="radio"/> All Tenants

Click any of the following options to include **Phones, Personal info, Deposits, Payments, Notes, and Dates / Charges**. If **Deposits Only** is selected, a deposits report will be generated listing only deposit information about each tenant.

You can include show **All Tenants**, or only **Current** or **Past** tenants. If **Due or Late Tenants** is selected, a **Rent Roll** report is generated, that lists each tenant and if their rent is **Due, Late** or **Paid**.

The **Dates / Charges** option displays the **Moved In** and **Moved Out** dates, the **Deposit** amount and **Rent** amount, the **Lease Expiration** Date, the day of the month that Rent is Late and the **Late Charge**.

The **Personal info** option displays the **SS# or Tax ID #, Auto License#, Primary Employer, Position, Email Address, and Other Employer** information in the report.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the [Translations screen in Preferences](#).

You can sort the report by **Tenant, Unit**, or rent **Due Date. Rent Roll** reports can be sorted by **Due or Late**. If the **Edit Report** option is enabled, you can click any tenant in the list to go directly to the Tenant's record.

<b>Sort By</b>	
<input checked="" type="radio"/> Tenant	<input type="radio"/> Unit
<input type="radio"/> Due Date	<input type="radio"/> Due or Late
Click a name to go to that record.	

The following buttons appear at the bottom of each report window.

<input type="button" value="Help"/>	<input type="button" value="Save as..."/>	<input type="button" value="Font"/>	<input type="button" value="Print"/>	<input type="checkbox"/> Edit Report
-------------------------------------	---	-------------------------------------	--------------------------------------	--------------------------------------

The font face, size, and line height of the list can be modified by clicking **Font**.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

## **Commercial Tenant Tracker Preferences**

Choose the Default Moved In date (first Due Date to be used for existing tenants). After setting this date and adding Payments to Rental Income Tracker, DO NOT change this date.

Default Moved In

Pay Rent First then Deposit     Pay Deposit First then Rent

Enable Online Payments     Compute Rent Based on Area

Copy emails instead of opening my email program

**There are several preferences you can set for Tenant Tracker.**

To access the Preferences window, click the **Prefs** button in Commercial Tenant Tracker. You will have a choice of **Tenant Tracker Prefs** or the program **Preferences**.

In **Tenant Tracker Prefs**, you will see a **Default Moved In** date field - click **Choose** to enter the first due date that you want the program to use for existing tenants. This will be used for the Tenant Tracker record's **Start Date** for each existing tenant.

Here you can choose to **Pay Rent First then Deposit** or **Pay Deposit First then Rent** when both are due and you click the **Create Receipt** button in Rental Income Tracker.

Choose **Enable Online Payments** to set up Online Credit Card Processing. Click **Help** in the Online Credit Card Processor window for more information.

Use the **Compute Rent Based on Area** option to choose between using the **Area** and **Rate** fields in Commercial Unit Tracker to compute the rent OR just entering a **Base Rent** amount into Commercial Tenant Tracker.

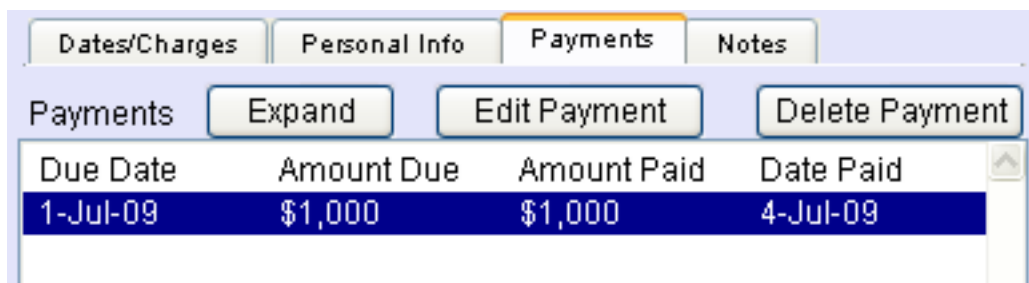
The **Copy emails instead of opening my email program** option should be used if you access your email from your browser (gmail, yahoo, etc.). After generating an email you will be instructed to create a new email and paste the receipt or notice into the body of the email.

## To Add Records to Commercial Tenant Tracker

1. Click the **New** button
2. Enter the **Business Name, First Name** and **Last Name** for your Tenant
3. Enter the amount of the **Deposit** and fill in all the **Deposit Details**
4. Enter the **Lease Expiration** date or MTM
5. Enter the day the **Rent is Due On**, usually the 1st of the month
6. Enter the **Late Charge** and the day the **Rent is Late On**
7. Enter any **Phone** numbers or other **Information**
8. Click **Add/Select Unit** and choose a Unit from your list
9. Choose the **Moved In** date - if the tenant is not new, pick a recent **Due Date** (usually the first of the month) for the **Moved In** date. If you have set a **Default Moved In Date** (or if it is after that date) then you can enter the actual date the tenant moved in

## To Correct Payments in Rental Income or Tenant Tracker

The way to correct errors in Rental Income Tracker is to first click **View Tenant**, click the **Payments** tab, select the line for the errant payment and then click either the **Edit Payment** or **Delete Payment** button that appears above the **Payments** field.



Due Date	Amount Due	Amount Paid	Date Paid
1-Jul-09	\$1,000	\$1,000	4-Jul-09

Clicking the **Edit Payment** button provides options for editing the **Due Date, Amount Due, Amount Paid** or the **Date Paid**. Make sure the **Due Date** is an actual beginning of a rental period (or the **Moved In Date**) and make sure the **Due Date** is not a duplicate.

If you click **Delete Payment**, you will be asked if you want to delete the Rental Income Tracker record. If you click **Yes**, then you will need to recreate the Rental Income Tracker record. If you click **No**, then you will need to correct the Rental Income Tracker record and then click **Create Receipt** so the payment is reposted to the Tenant's **Payments** field.

You can **ONLY** create a Rental Income Tracker record for the next rental period as determined by the last line in the **Payments** field on the Tenant's record. So if you need to correct a payment from a previous month, it is better to choose the **Edit Payment** method, rather than the **Delete Payment** method, because you will not be able to create a new Rental Income Tracker record. You can add another **Payment** for any rental period on the Commercial Tenant Tracker record.

# Rental Income Tracker

The **Payment Date (1)** is automatically filled in when you click the **New** button in Rental Income Tracker, but can easily be changed by using one of the buttons above the field. A list of tenants will appear for you to choose from.

The screenshot shows the Rental Income Tracker interface with the following elements and callouts:

- 1**: Payment Date field with 'Today' and 'Choose' buttons above it.
- 2**: Tenant field with 'Go To Another Tenant' button above it.
- 3**: Unit field with 'View Unit' and 'View Tenant' buttons above it.
- 4**: Charges field with 'Add Charge' button above it.
- 5a**: Starting Date field.
- 5b**: Ending Date field.
- 5c**: Late Date field.
- 6**: Notes field with 'Add Notes to Receipt' checkbox above it.
- 7**: Payment field.
- 8**: Payments field with 'Rent Paid' checkbox above it.
- 9**: Batch # field.
- 10**: Create Statement button.
- 11**: Create Receipt button.
- 12**: Income Report button.

Other visible elements include: Record # 3, navigation buttons (First, Prev, Next, Last), and a menu bar with buttons: New, Delete, Find, Sort, Import, Export, Prefs, Help, Quit, Save.

The **Tenant's name (2)**, the **Unit (3)**, the current **Charges (4)**, **Starting Date (5a)** (the first day of the rental period), the **Ending Date (5b)** (the last day of the rental period), the **Late Date (5c)** and are automatically entered when the Tenant is chosen.

All charges, including the current rent, any past due balance, recurring charges and additional charges are displayed in the **Charges field (4)**. You can easily add charges to the list by simply typing in the field or clicking **Add Charge**.

Create a rent receipt for printing by clicking the **Create Receipt** button (11). The total of all charges is displayed in the **Payment** field (7) and a new line is added to the **Payments** field (8). Change the amount of the payment by clicking this field (7) .

## **Partial Payments**

If the tenant makes a partial payment, enter the payment in the **Payment** field (7) and the amount will be noted in the **Payments** field (8) when the **Create Receipt** button (11) is clicked. When additional payments are made, return to the record, enter a new Payment Date (1), the **Payment** amount (7) and click **Create Receipt** (11).

## **Other Features**

To create a statement of all charges due (instead of a receipt which implies a payment was made) click the **Create Statement** button (10).

To find another Rental Income Tracker record, click **Go To Another Tenant** which is above the **Tenant** field (2). You can easily display the Unit or Tenant records by clicking the **View Unit** or **View Tenant** buttons above the **Unit** field (3).

Record helpful reminders, notes, etc. in the **Notes** field (6). You can add these notes to the Receipt by clicking the **Add Notes to Receipt** button above the field (6).

The **ACP** button automatically creates new records for those tenants who have the the **Automatically Create Payment** option enabled on their Tenant Tracker record, and adds lines to the **Payments** field on the Tenant's record. You should only use this feature if you automatically deduct the tenant's rent from their checking account.

You can create Batch reports by entering a unique number in the **Batch #** field (9) for all the records for one batch (ie, a deposit).

When you create a new record for a Tenant the **Rent Paid** (8) button on the current record for that Tenant is highlighted. This indicates that no further changes can be made to that record. Deselect the **Rent Paid** option If you need to make changes.

Reports on one or more tenants or units can be generated by clicking the **Income Report** button (12).

## **To Add Records to Rental Income Tracker**

1. Click the **New** button and select a Tenant from the list.
2. Change the **Payment Date** to the correct date if necessary
3. Add or delete lines to the **Charges** field if necessary
4. If this is a partial payment, enter the amount paid in the **Payment** field
5. Click **Create Receipt** to transfer the payment to Commercial Tenant Tracker

## Rental Income Tracker's Report Options

The screenshot shows a form with several sections. At the top left, there is a checked checkbox for 'All Tenants' and a 'Select Tenant' button. Below this is a text input field. To the right, under 'Sort By', there are radio buttons for 'Unit' (selected), 'Tenant', 'Date Paid', and 'Start Date'. Below the 'All Tenants' section, there is a checked checkbox for 'All Units', 'Select Bldg' and 'Select Unit' buttons, and another text input field. The 'Dates' section includes a 'Choose Dates' dropdown menu and a checked checkbox for 'All Dates'. Below this are 'Start Date' and 'End Date' fields, each with 'Jan 1' and 'Today' buttons and 'Choose' buttons.

You can report on **All Tenants** or just a specific tenant by clicking **Select Tenant**. Or you can report on **All Units** or just a specific unit or building by clicking **Select Bldg** or **Select Unit**. You can specify a range of dates to report on by clicking the **Start Date** field or **End Date** field and then entering a date or by clicking the **Today** or **Choose** buttons above the fields.

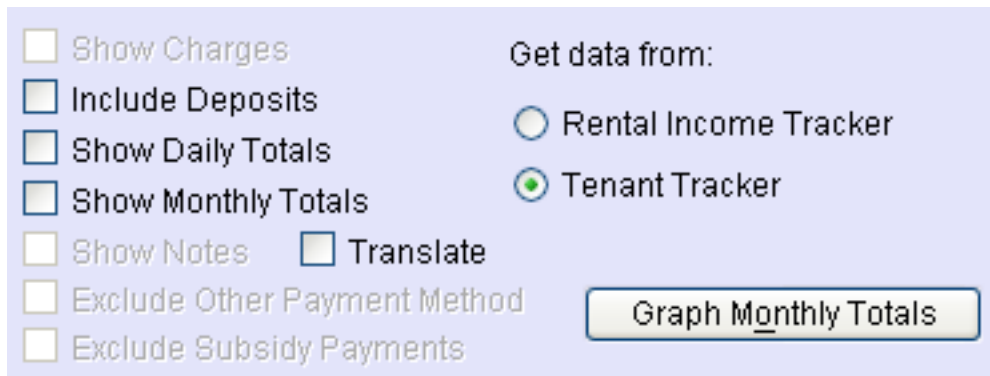
This section shows a checked checkbox for 'All Batches' and a 'Select Batch' button, followed by a text input field.

Print only the records for a particular batch by clicking the **Select Batch** button.

This section contains a list of checkboxes: 'Show Charges', 'Include Deposits', 'Show Daily Totals', 'Show Monthly Totals', 'Show Notes', 'Exclude Other Payment Method', and 'Exclude Subsidy Payments'. There is also a 'Translate' checkbox next to 'Show Notes'. To the right, under 'Get data from:', there are radio buttons for 'Rental Income Tracker' (selected) and 'Tenant Tracker'. A 'Graph Monthly Totals' button is located at the bottom right.

You can also **Show Charges**, **Include Deposits**, **Show Daily Totals**, **Show Sub Totals** or **Show Notes** by checking those options (**Show Sub Totals** is not available for reports on only one tenant or unit).

The report can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Unit**, **Tenant**, **Date Paid**, and **Start Date** (the first day rent was due).



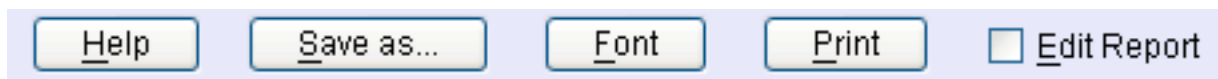
A screenshot of a software interface showing report options. On the left, there are several checkboxes: 'Show Charges', 'Include Deposits', 'Show Daily Totals', 'Show Monthly Totals', 'Show Notes', 'Exclude Other Payment Method', and 'Exclude Subsidy Payments'. The 'Show Notes' checkbox is followed by a 'Translate' checkbox. On the right, under the heading 'Get data from:', there are two radio buttons: 'Rental Income Tracker' and 'Tenant Tracker', with 'Tenant Tracker' selected. A 'Graph Monthly Totals' button is located at the bottom right of the options area.

You can generate a report based on the records in either Rental Income Tracker or Tenant Tracker. If you have deleted records from Rental Income Tracker, then the data from the **Payments** field in Commercial Tenant Tracker will be more complete.

If Tenant Tracker is selected, you can't specify a **Batch** or **Show Charges** or **Sub Totals** or **Show Notes** since these fields are not transferred to Tenant Tracker.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences.

Along the bottom of the report window are five buttons and an **Edit Report** option. The **Close Window** button is not pictured.



Use the **Edit Report** option to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

The font face, size, and line height of the list can be modified by clicking the **Font** button. You can print the Unit Report by clicking the **Print** button.

To save the list as a text file for importing into another program click the **Save as...** button. Click **Help** for more information about the report options.

# Rental Expense Tracker

In Rental Expense Tracker, the **Date (1)** is automatically entered when the record is created. You can locate a record for a particular date by clicking **Find** above this field.

The screenshot shows the Rental Expense Tracker form with the following numbered callouts:

- 1**: Date field
- 2**: Expense field
- 3**: Payee field
- 4**: Account field
- 5**: Check # field
- 5b**: Print button
- 6**: Unit field
- 7**: Notes text area
- 8**: Add button
- 9**: Amount (Including Tax) field
- 10**: Tax Paid field
- 11**: Tax Deductible dropdown menu
- 12**: Travel Deduction field
- 13**: Account Register button
- 15**: Notes checkbox

Choose the **Expense type (2)** from a list provided or create your own. If **Auto and Travel** is selected fields to record the **Gallons** (or Liters), amount per unit and the total **Fuel Cost** will appear.

Gallons		\$/Gal	=	Fuel Cost
10.78	x	3.99	=	\$43

Create your own lists of **Payees (3)** by clicking the **Add/Select Payee** button above the field. Your list of payees will include all the people or businesses you pay money to.

Create your own lists of **Accounts (4)** by clicking the **Add/Select Account** button. These can include Checking and Savings, Credit Cards or Lines and Cash accounts.

Click the **Find** button above the field (**2, 3 or 4**) to see a list of similar records. You can **Go To** the record or **Duplicate a Recurring Expense Record**.

Record the check number (if applicable) in the **Check #** field (5). Click the **Print** button (5b) above this field to print your check. Use the **CL** button next to the field to indicate that the check has cleared the bank.

Assign the expense to a particular Building or **Unit (6)** by clicking **Select Bldg** or **Select Unit**.

Keep notes of any length about the expense in the **Notes** field (7).

All numbers in the **Notes** field (7) can easily be added to the **Expense Amount (9)** by clicking the **Add to Expense Amount** button (8).

The total amount paid is entered into the **Amount (including tax)** field (9). You can keep track of the **Tax Type** and the amount of **Tax Paid** in the fields provided (10).

Use the **Tax Deductible** option menu (11) to indicate whether the expense should be Tax Deductible, Not Deductible or if it should be added to the **Depreciate** list in the **Tax Form Report**.

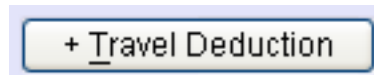
Keep track of tax deductible mileage with the handy calculator which is revealed by clicking the **Travel Deduction** button (12). Here are the **Travel Deduction** fields:

The screenshot shows a calculator interface for travel deductions. At the top, there is a 'Date' field with a dropdown menu showing 'Tuesday, May 19, 2009'. To the right of the date field are three buttons: 'Find', 'Today', and 'Choose'. Further right is a checkbox labeled 'Tax Deductible' which is checked. Below the date field is a large button labeled 'Expense & Amount'. Below this, there is a calculation area with four input fields: 'Included In Expense Reports' (containing '123'), 'Miles' (containing '123'), '\$/mile' (containing '.345'), and 'Travel Deduction' (containing '\$42.44'). The calculation is shown as '123 x .345 = \$42.44'.

Just enter the number of **Miles** traveled and the reimbursement amount per mile (**\$/mile**) and the **Travel Deduction** amount will be calculated.

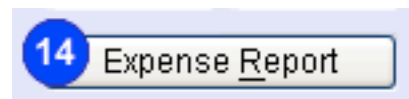
Click the **Expense & Amount** button to hide the **Travel Amount** fields.

When there is a **Travel Deduction** amount the **Travel Deduction** button has a **+** in it and looks like this.



View a balance sheet for the current Account by clicking **Account Register (13)**

Create several **Expense Reports (14)** from the Report Options window.



## About Accounts

Create your own lists of **Accounts** by clicking the **Add/Select Account** button. These can include Checking and Savings, Credit Cards or Lines and Cash accounts.

Create an account or select one from the list on the left and then click a button on the right.

Checking MasterCard VISA	<b>Choose Account</b>
	Create Account
	Modify Account
	Delete Account
	Import/Export

Account #

Account Type

Starting Balance

Current Balance

Last Check # Used

Allow Duplicate Check #s

Help
Close Window

You can add, delete or modify this list of accounts to suit your needs. Just click **Add/Select Account**, then click **Create Account** or click an account and then click **Modify Account** or **Delete Account**.

When you click **Create Account** you will be asked to enter a name and then an **Account #**. Next enter the **Starting Balance** and the **Last Check # Used**. The Starting Balance is used in the Account Register window.

Next select an **Account Type**. Click the **Help** button in this window for more information about the different Account Types.

The **Last Check # Used** field is incremented whenever you create a Rental Expense Tracker record with a **Check #** for that account.

If you want to have several records for one check #, then enable the **Allow Duplicate Check #s** option.

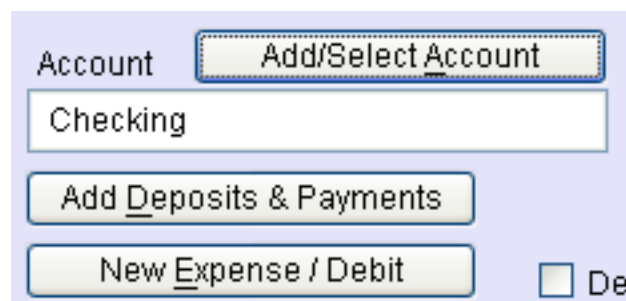
When you click an Account in the list, the **Starting Balance**, the **Current Balance** and the **Last Check # Used** are displayed in the fields at the bottom of the window. You can modify the **Starting Balance** or the **Last Check # Used** by clicking the field. The **Current Balance** is calculated in the Account Register window and is not editable.

You can go to the first or last record for a particular Account by clicking the **Find** button above the **Account** field in the Rental Expense Tracker record.

To transfer funds from one **Account** to another, click the **Add/Select Payee** button in the Rental Expense Tracker record and choose **Transfer to Another Account**. You will then be prompted to enter the **Account** to transfer the funds from. Next you will enter the date of the deposit (or transfer) and the amount.


## **Account Register**

The **Account Register** button takes you to the Account Register window where all the checks you've entered into Rental Expense Tracker and Payments or Deposits in Other Income Tracker for that **Account** are listed.



The screenshot shows a software interface for the 'Account Register' window. At the top, there is a label 'Account' followed by a button labeled 'Add/Select Account'. Below this is a text input field containing the word 'Checking'. Underneath the input field are three buttons: 'Add Deposits & Payments', 'New Expense / Debit', and a partially visible button 'De'. To the right of the 'New Expense / Debit' button is a small square checkbox.

At the top of the window you can **Add/Select** another **Account**, **Add Deposits & Payments**, add a **New Expense / Debit**. You can also choose a **Start Date**, an **End Date** or **All Dates** and choose whether to display **Descriptions** or not. You can also add **Daily Separators**, or **Translate** the register.



This screenshot shows the bottom portion of the 'Account Register' window. It features three checkboxes with labels: 'Descriptions', 'Daily Separators', and 'Translate'. Each checkbox is currently unchecked.

When you click the **Add Deposits & Payments** button a new Other Income Tracker record will be created.

The report lists checks that have cleared (the **CI** checkbox has been clicked on the Rental Expense Tracker record) as [C] and not cleared as [ ]. You can use this feature to reconcile your check book or account statement.

The **New Expense / Debit** button returns you to Rental Expense Tracker and creates a new record.

You can **Print** the register or save it to a text file by clicking the **Save as...** button.

## **To Add Records to the Rental Expense Tracker**

1. Click the **New** button. You will be asked if you want a **New** blank record, a record with the same **Payee/Expense** as the current record, or a **Duplicate** of the current record. If you choose **Duplicate or Payee/Expense**, you will be asked for an expense amount. If you choose **New**, you will be asked to select an **Expense** type from the list.
2. Change the payment **Date** to the correct date if necessary.
3. Add or Select a **Payee** if one was not duplicated.
4. Add or Select an **Account** from your list.
5. Enter an **Amount**, any **Tax Paid**, and the **Check #** if applicable.
6. Select the **Unit** or **Bldg** if the expense is related to a particular property.
7. Add any **Notes** about the Expense.
8. If you had to drive somewhere in connection with this expense, click the **Travel Deduction** button and enter the number of miles traveled.

When you click the **New** button, you are also offered the option of **Combining** all the expense records for the current **Payee** on the current **Date**. If you choose **Combine** you will have a choice of **Creating a New Record** or to **Just Print a Check** for the combined amount. Any check numbers will be replaced with a new check number. If you choose **Create New Record** the Amounts on existing records will be changed to Combined, the records will no longer appear in reports, and a list of the Units and Amounts will be added to the **Notes** field on the new record. If you choose **Just Print Check** the list of Amounts and total Travel Deductions will appear in the **Voucher** field.

## Recording and Printing Checks

The screenshot shows a software window for recording and printing checks. It features a light blue background. At the top right, there is a 'Date' input field. Below it, on the left, is a 'Pay to the order of' input field. To the right of this field is a 'Dollars' input field, followed by an 'Amount' input field. Below the 'Pay to the order of' field is a 'Memo' input field. To the right of the 'Memo' field is a 'Check #' input field. At the bottom of the window, there are five buttons: 'Close Window', 'Help', 'Reset', 'Layouts', and 'Print Check'. Above the 'Print Check' button is a 'Print Check Alignment Test' button. To the left of the 'Print Check Alignment Test' button are three checkboxes: 'Voucher', 'Margins', and 'Reposition'.

The **Print** button above the **Check #** field in Rental Expense Tracker takes you to the Check Printing window where you can print a check. Most of the fields are automatically filled in but you can edit them before printing.

At the bottom of the window are several buttons you can use to modify the position of the fields in the printout.

Start by clicking the **Print Check Alignment Test** button which will print a test check on a plain piece of paper. Hold the printout up against a blank check and look at a light through the papers to see how close the alignment is.

If the printout is way off, click the **Margins** button. This will show fields where you can specify the margins for printing. Bigger numbers in the **Top** and **Left** fields provide more space from the top and left edges of the paper. Click the **Margins** button again to hide these fields.

Click the **Reposition** button to allow the movement of any of the fields for better alignment. Several test printings may be necessary before you have everything aligned properly. Click the **Reposition** button again when you are done.

Some experimentation may be necessary to get the fields to line up correctly with the spaces on your checks. The labels, field borders and check number field will not print on your check. They are only for alignment purposes.

The **Reset** button will reset the positions of all fields back to the default setting in case you want to start again.

The **Layouts** button opens a small window where you can save any number of layouts for future use. After getting all the fields to align properly with your checks, you should create a layout. This will make restoring the layout easy when you update.

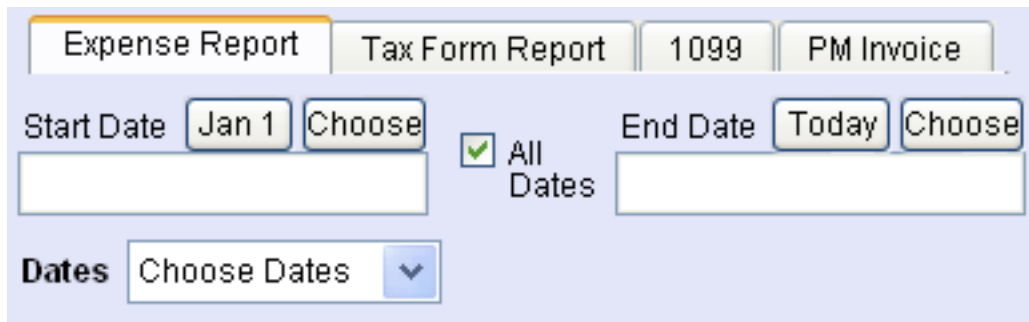
The **Voucher** option will cause a voucher section to be printed below the check with details from the Rental Expense Tracker record.

When everything looks correct, click the **Print Check** button and print out your check.

## **Rental Expense Tracker's Reports**

Easily create lists of expenses by clicking the **Expense Report** button in the Rental Expense Tracker window.

You will be presented with an Expense Report Options window. There are four tab buttons at the top of this window. The **Expense Report** tab displays normal expense report options. The **Tax Form Report** tab displays options for generating a report you can use to fill out your tax forms. You can generate 1099-MISC forms in the **1099** tab. The **PM Invoice** tab displays options for creating a **Property Management Invoice**.



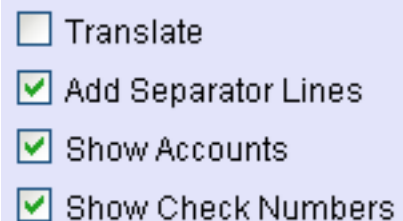
The screenshot shows the 'Expense Report Options' window. At the top, there are four tabs: 'Expense Report' (selected), 'Tax Form Report', '1099', and 'PM Invoice'. Below the tabs, there are two date selection fields: 'Start Date' with 'Jan 1' and 'Choose' buttons, and 'End Date' with 'Today' and 'Choose' buttons. A checkbox labeled 'All Dates' is checked. Below these is a 'Dates' dropdown menu with 'Choose Dates' selected.

## **Expense Report Options**

There are several **Expense Report** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu button.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences.

**Add Separator Lines** for better readability. **Show Accounts** and **Show Check Numbers** if desired.



The screenshot shows a list of four options with checkboxes: 'Translate' (unchecked), 'Add Separator Lines' (checked), 'Show Accounts' (checked), and 'Show Check Numbers' (checked).

The **Tax Deductible Only** option will include only Rental Expense Tracker records with the **Tax Deductible** option (at the top of the screen) enabled. Otherwise all records are included in the report.

You can also **Show Travel Deductions** and **Taxes Paid**. Add your notes to the report by checking **Show Notes**.

If the **Sort Order is Date**, you can add totals by clicking **Show Monthly Totals** or **Show Yearly Totals**.

You can report on all expenses by clicking the **All** button next to the expenses field or choose one or more specific expenses to include in the report by clicking **Select Expense(s)**.

You can report on all **Units** by clicking the **All** button next to the units field OR choose one or more specific units to include in the report by clicking **Select Unit(s)**.

If you want a report for a building rather than a particular unit, click **Select Bldg(s)**.

You can report on all **Payees** by clicking the **All** button next to the payees field or choose one or more specific payees to include in the report by clicking **Select Payee(s)**.

You can report on all **Accounts** by clicking the **All** button next to the accounts field or choose one or more specific accounts to include by clicking **Select Account(s)**.

You can sort the **Expense Report** by choosing an option from the **Sort Order** group. The choices are **Date**, **Payee**, **Unit**, **Expense** or **Account**.

The rent collected for each unit will be listed in the report by checking the **Include Income Info** option. A total profit or loss for these units can then be calculated and added to the report. Also, only income for previous months is reported.

To generate your report click the **Create Report** button.

- Tax Deductible Only
- Show Travel Deductions
- Show Taxes Paid
- Show Notes
- Show Monthly Totals
- Show Yearly Totals

The screenshot shows a software interface for generating a report. It features several selection fields, each with a dropdown menu and an 'All' button to its left. The fields are: 'Select Expense(s)', 'Select Bldg(s)', 'Select Unit(s)', 'Select Payee(s)', and 'Select Account(s)'. Below these fields is a 'Sort Order' section with five radio button options: 'Date' (selected), 'Payee', 'Unit', 'Expense', and 'Account'. At the bottom right, there is a checkbox labeled 'Include Income Info' which is checked.

## **Tax Form Report Options**

There are several **Tax Form Report** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu button.

If you use the **Standard Mileage Rate** option in your **Tax Form Report**, all the mileage amounts will be totaled on the report. If you choose the **Actual Auto Expenses** option, only records with the **Expense** type **Auto and Travel** will be totaled on the report.

Choose the **Tax Deductible Only** option to include only records marked as **Tax Deductible** in your report.

Click the **Show Taxes Paid** option to include the **Tax Paid** information.

You need to select an owner for the report by clicking the **Select Owner** button and choosing one from the list (which comes from [Commercial Unit Tracker](#)).

You can report on all **Units** by clicking the **All** button next to the units field or choose one or more specific units to include in the report by clicking **Select Unit(s)**.

If you used any units for personal use for more than ten days, click the **Select Units Used for Personal Use** button and choose them.

To choose a unit to post unspecified expenses to, click the **Post Unspecified Expenses to Unit** button.

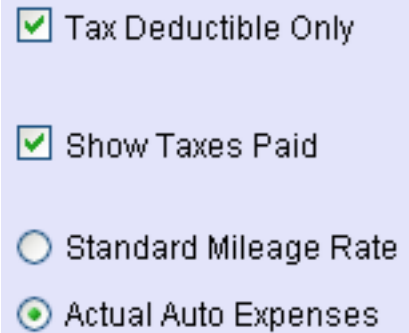
The rent collected for each unit will be listed in the report by checking the **Include Income Info** option. A total profit or loss for these units can then be calculated and added to the report. Only income for previous months is reported.

To generate your report click **Create Tax Form Report**.

## **1099 Generator**

There are several **1099 Generator** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu button.

Click **Select Payee** to choose the person you want to create the 1099-MISC form. If you have filled out the **Description** section for the person, most of the information in the **Recipient Information** field will be filled in. If not, you will need to fill in this information before continuing. Click the **Show Payers Information** button to fill in the **Payer Information** field. You must also do this before generating the 1099.



A screenshot of a software menu titled "Tax Form Report Options". The menu is light blue and contains four items: "Tax Deductible Only" with a checked checkbox, "Show Taxes Paid" with a checked checkbox, "Standard Mileage Rate" with an unchecked radio button, and "Actual Auto Expenses" with a selected radio button (indicated by a green dot).

You can report on all accounts by clicking the **All** button next to the **Accounts** field or choose one or more specific accounts to include in the report by clicking **Select Account(s)**.

Choose the **Tax Deductible Only** option to include only records marked as **Tax Deductible** in your report.

Click **Preliminary Report** to generate a report for the Payee or Recipient. By doing this you can confirm that all the correct records are included in the total that will be displayed on the 1099-MISC form.

Click the **Generate 1099** button to view the Form 1099-MISC Printer window. Click **Help** in this window for information about printing the 1099 form.

### **Property Management Invoice Options**

The screenshot shows a software interface for generating a Property Management Invoice. At the top, there are four tabs: "Expense Report", "Tax Form Report", "1099", and "PM Invoice", with "PM Invoice" being the active tab. Below the tabs, there are two date selection fields: "Start Date" (with "Jan 1" and "Choose" buttons) and "End Date" (with "Today" and "Choose" buttons). A checkbox labeled "All Dates" is checked. Below the "Start Date" field is a "Dates" dropdown menu set to "Choose Dates". To the right of the "End Date" field is a "Select Owner" button. Below the "Select Owner" button is a text input field. At the bottom left, there is a "Translate" checkbox. At the bottom right, there is a note: "Specified in the Unit's Tax Info tab."

There are several **Property Management Invoice** options. Specify the **Start Date** and **End Date** or click the **All Dates** button or choose a date range from the **Dates** menu.

You need to select an owner for the report by clicking the **Select Owner** button and choosing one from the list.

Specify an **Invoice #** (if you wish), and a **Management Fee** (either a flat rate or a percentage of the rent collected). You can also specify a **Service Fee** (either a flat rate or a percentage of the expenses paid),

You can report on all **Units** by clicking the **All** button next to the units field or choose one or more specific units to include in the report by clicking **Select Unit(s)**.

Any Rental Expense Tracker records with the **Add to PM Invoice** option enabled will be added to the PM Invoice by choosing **Include Marked Expenses**.

Any Other Income Tracker records with the **Add to PM Invoice** option enabled will be added to the Property Management Invoice by choosing **Include Marked Income**.

You can also change the title of the report from **Invoice instead of Statement**.

Click **Edit Header** to add any amount of text to the top of the Invoice, by enabling **Add Management Header**.

The rent collected for each unit will be listed in the report by checking the **Include Income Info** option. Only income for previous months is reported.

Click the **Create Property Management Invoice** button to generate an Invoice or Statement which includes all the rents collected and expenses paid for one or more Units or Buildings for one particular Owner or Landlord.

## Other Income Tracker

In Other Income Tracker, the **Date (1)** is entered when the record is created. You can locate a record for a particular date by clicking the **Find** button above this field.

The screenshot shows the 'Other Income Tracker' form with the following fields and buttons:

- 1**: Date field with buttons 'Find', 'Today', and 'Choose' above it.
- 2**: Source field with buttons 'Find' and 'Add/Select Source' above it.
- 3**: Income Amount field with a 'How' button above it.
- 4**: Tax Type and Tax Collected fields.
- 5**: Account field with buttons 'Find' and 'Add/Select Account' above it.
- 6**: Unit field with buttons 'Select Bldg' and 'Select Unit' above it.
- 7**: Auto Import Income button.
- 8**: Account Register button.
- 9**: Misc 1 field with a 'Change' button above it.
- 10**: Misc 2 field with a 'Change' button above it.
- 11**: Notes text area with a scroll bar.
- 12**: Income Report button.
- 13**: Add to PM Invoice checkbox.

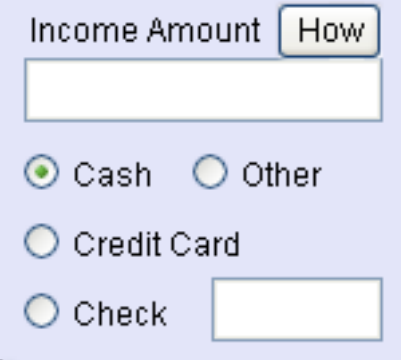
Additional buttons on the right side include: New, Delete, Find, Sort, Import, Export, Prefs, Help, Quit, Save, and Record # 1.

**Commercial Rental Tracker Menu**

Choose the income **Source** type (**2**) from a list provided or create your own. The **Source** could be a person, an activity, etc. Then enter the **Income Amount** (**3**).

Enter any tax collected in connection with the **Income Amount** in the **Tax Type** and **Tax Collected** fields (**4**).

Clicking the **How** button above the **Income Amount** field (3) will reveal fields (shown to the right) where you can record the payment type by clicking the **Cash**, **Credit Card**, **Check** or **Other** button and entering a check # or other payment type.

A screenshot of a software interface showing a form for recording payment type. At the top, there is a label 'Income Amount' and a button labeled 'How'. Below this is a large empty text input field. Underneath the input field are four radio button options: 'Cash' (which is selected), 'Other', 'Credit Card', and 'Check'. To the right of the 'Check' option is another empty text input field for entering a check number.

Create your own lists of **Accounts (5)**. Your list might include business checking or credit lines, escrow accounts, or cash accounts.

Assign the income to a particular **Building** or **Unit (6)** by clicking the **Select Bldg** or **Select Unit** buttons.

Keep notes of any length about the income in the **Notes** field (11).

You can import payments from Rental Income Tracker by clicking the **Auto Import Income** button (7).

View a balance sheet for the current **Account** by clicking **Account Register (8)**.

There are two misc fields which you can use for any purpose (9 and 10). Click the **Change** button above either of these fields to change the labels. You can sort the records or reports by these two fields.

Creating **Income Reports (12)** is as easy as clicking this button.

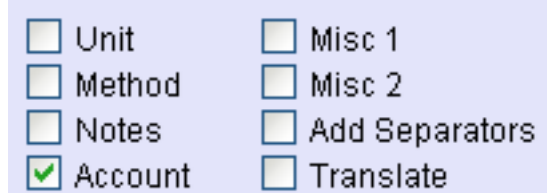
## **To Add Records to Other Income Tracker**

1. Click the **New** button. You will be asked if you want a **New** blank record, a record with the same **Source/Account** as the current record, or a **Duplicate** of the current record. If you choose **Duplicate or Source/Account**, you will be asked for an **Income Amount**. If you choose **New** you will be asked to select a **Source** type from the list, then the **Account** and finally the **Income Amount**.
2. Change the payment **Date** to the correct date if necessary.
3. Add or Select a **Source** if one was not duplicated.
4. Select an **Account** from your list.
5. Enter an **Income Amount** and any **Tax Collected** if applicable.
6. Select the **Unit** or **Bldg** if the income is related to a particular property.
7. Add any **Notes** about the income.
8. Enter any information into the **Misc 1** or **Misc 2** fields.

## Other Income Tracker's Report Options

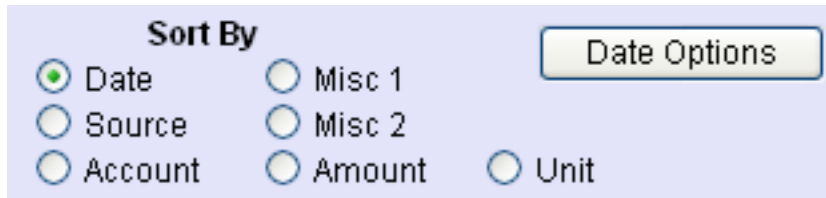
Easily create a report of all your Other Income Tracker records by clicking the **Income Report** button in the Other Income Tracker window.

There are several options to choose from at the top of the Income Report window. Choosing these options causes that type of information to be added to the report. These include: **Unit**, **Method**, **Notes**, **Account**, **Misc 1**, **Misc 2**, and **Add Separators**. This last option causes extra lines to be added between units.



A screenshot of a light blue panel containing two columns of checkboxes. The first column has checkboxes for 'Unit', 'Method', 'Notes', and 'Account', with 'Account' checked. The second column has checkboxes for 'Misc 1', 'Misc 2', 'Add Separators', and 'Translate'.

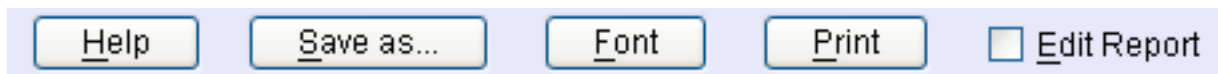
The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Date**, **Source**, **Account**, **Misc 1**, **Misc 2**, **Amount** and **Unit**.



A screenshot of a light blue panel. On the left, under the heading 'Sort By', there are seven radio buttons: 'Date' (selected), 'Source', 'Account', 'Misc 1', 'Misc 2', 'Amount', and 'Unit'. To the right of these is a button labeled 'Date Options'.

You can choose a particular date range by clicking the **Date Options** button.

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.



A screenshot of a light blue panel containing five buttons: 'Help', 'Save as...', 'Font', 'Print', and 'Edit Report'. The 'Edit Report' button has a small square icon to its left.

Use the **Edit Report** button to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

The font face, size, and line height of the text of the report can be modified by clicking the **Font** button. You can print the report by clicking the **Print** button. To save the list as a text file for importing into another program click the **Save as...** button.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

## Asset Tracker

Use Asset Tracker to keep track of all the appliances, furniture, etc. that are part of your units. Enter a short description in the **Asset Description (1)** field. You can use the **Find Asset** button above this field to go to another asset.

The screenshot shows the 'Asset Tracker' form with the following fields and buttons:

- 1**: Asset Description text field.
- 2**: Make, Model, etc. text field.
- 3**: Serial Number text field.
- 4**: Unit text field, with 'Select Bldg' and 'Select Unit' buttons above it.
- 5**: Notes about Condition and Repairs text area.
- 6**: Purchased text field.
- 7**: Purchase Price text field.
- 8**: Date Sold text field.
- 9**: Sale Price text field.
- 10**: Asset Report button.

Other elements include a 'Find Asset' button above field 1, 'Choose' buttons above fields 6 and 8, a 'Record #' field with value '2', navigation buttons (First, Prev, Next, Last), and a grid of buttons: New, Delete, Find, Sort, Import, Export, Prefs, Help, Quit, Save. A 'Commercial Rental Tracker Menu' bar is at the bottom left.

Describe the asset's **Make, Model, etc. (2)** in the field provided.

Enter the **Serial Number (3)** and assign a **Unit (4)** by clicking **Select Unit** or **Select Bldg** and then choosing from your list of units or buildings.

Keep extensive **Notes about the Condition and Repairs (5)** of the Asset.

Record the date **Purchased (6)**, the **Purchase Price (7)**, the **Date Sold (8)** and the **Sale Price (9)** in these fields.

Create an **Asset Report (10)** by clicking the button at the lower right corner.

### **Asset Report Options**

<b>List Options</b>	<input type="checkbox"/> Show Purchase & Sold Dates
<input type="checkbox"/> Show Make, Model, etc.	<input type="checkbox"/> Show Only Current Inventory
<input type="checkbox"/> Show Serial Numbers	<input type="checkbox"/> Show History Notes

Add any of the following **List Options** to your report: **Show Make, Model, etc.**, **Show Serial Numbers**, **Show Purchase and Sold Dates**, **Show Only Current Inventory**, **Show History Notes**.

You can **Sort By Description, Purchase Date or Unit**.

### **To Add Records to Asset Tracker**

1. Click the **New** button. You will be asked if you want to create a record for a similar asset, or if you want to start with a blank record. If you choose **Similar Asset**, the **Asset Description, Make, Model, etc. and Purchase Price** fields will be copied to the new record. You will then be asked to enter the **Serial Number**. On a new **Blank** record you will first be asked to enter an **Asset Description**.
2. Fill in the **Make, Model, etc.** field with a more detailed description of the asset, and then record the **Serial Number**, if there is one. You can also keep track of the date **Purchased**, the **Purchase Price**, and eventually the **Date Sold** and the **Sale Price**.
3. Select the building or unit the asset belongs to by clicking **Select Bldg** or **Select Unit**.
4. Enter any **Notes about the Condition and Repairs** about the asset.

# Contact Tracker

Each record in Contact Tracker consists of fields for the contact's:

- First Name (1)**
- Last Name (2)**
- Company Name (3)**
- Mailing and Shipping Addresses (4 & 4b)**
- City, State, and Province (5)**
- Zip Code, and Country (5b)**

You can switch between **Mailing** and **Shipping** addresses by using the tab buttons (**4b**).

To quickly prepare an envelope for printing, choose **Mailing** or **Shipping** and then click **Prepare Envelope (6)** located above the **Company Name** field. You can add your return address or make other changes before clicking the **Print** button in the resulting window.

The screenshot shows a form with the following fields and callouts: 1 (First Name), 2 (Last Name), 3 (Company Name), 4 (Address - Mailing tab selected), 4b (Shipping tab), 5 (Province), 5b (Country), and 6 (Prepare Envelope button). A 'Go To' button is also visible above the Last Name field.

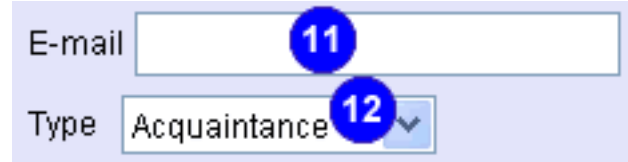
This section shows three sub-forms: 'Phones/Fax/Pagers' with callout 7, 'Family or Associates' with callout 8, and 'Address Format for this Contact' with a dropdown menu showing 'Default from Prefs' (callout 9) and a 'Show Misc. Fields' button (callout 10).

You can also add information such as **Phones/ Fax/ Pagers (7)**, the names of **Family or Associates (8)** and any **Notes**.

The **Address Format for this Contact** menu (**9**) determines the order and format of the City, State, Province, and Zip or Postal Code when printed. There is a similar menu in the **Formats** section of **Prefs** that becomes the **Default**, but you can specify a different format for each contact if you wish.

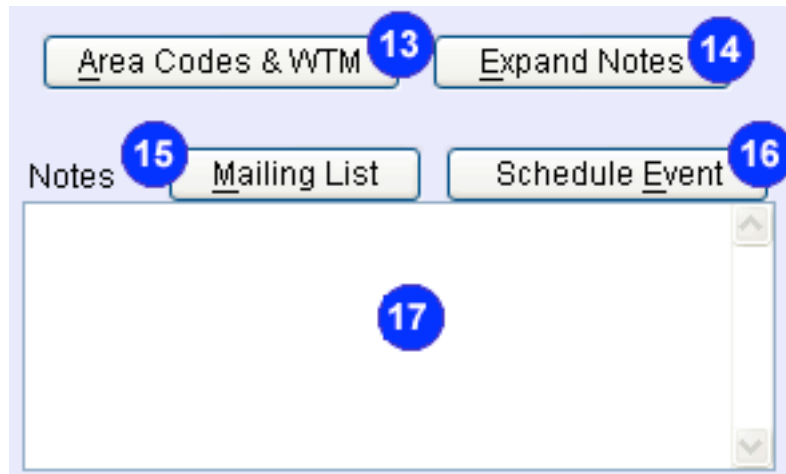
There are also four miscellaneous fields, accessed by the **Show Misc. Fields** button (**10**) which you can use for any purpose. To change the labels for these fields, click the **Change** button above them and enter a new name. You can sort the records or reports on any of these fields, in addition to several others.

an **E-mail** address (11) in the field provided. Below this field is a **Contact Type** menu button (12). There are 11 Types to choose from including: **Acquaintance, Agent, Client, Customer, Employee, Family, Friend, Guest, Owner, Sales Rep., and Vendor**. If the Type Customer is chosen then a **Customer Number** field will appear. If the Type Vendor, Agent or Sales Rep. is chosen then a **Tax ID#** field will appear. If Employee is chosen then the **Tax ID#** and an **Employee #** field will appear. If the Type Owner is chosen then the **Tax ID#** and a **Management Fee** field will appear.



E-mail  (11)  
Type  (12) ▾

Click the **Area Codes & WTM** button (13) to access either the **Area Code** lookup tool or the **World Time Map** where you can see at a glance what time it is in any part of the world.



(13)  (14)  
 (15)   (16)  
 (17)

You can keep any amount of notes in the **Notes** (17) field. To enlarge the Notes field, click **Expand Notes** (14).

The **Mailing List** (15) is discussed on the next page.

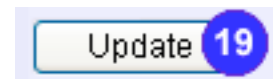
The **Schedule Event** (16) button creates a new record in Schedule Tracker with the **Contact** as the **Event**.

The **Best Friends Forever List (or BFF List)** button (18) opens a new window where you can add contacts to a Best Friends Forever list. This window has a special notes field, a **Last Contacted** field and buttons to manage the list.



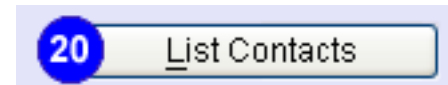
(18)

Click the **Update** button (19) to add or update your Client information to Contact Tracker.



(19)

View a complete list of contacts by clicking the **List Contacts** (20) button. You can easily sort and display only specified contacts. You can also save them to a text file or print them.



(20)

You can add new records or edit the information for any record at any time.

## **Sending Form Letters to a Mailing List**

When you click the **Mailing List (13)** button, you are presented with a Contact Chooser window, where you can choose which contacts to send a form letter. If you want to send the letter to all of your contacts, click the **Select All** button. Or click the **Select** button beside the name of each contact you want to send the letter.

**Select the people you want to send your form letter to.**

Adjust widths by dragging between headers, Sort by clicking a header.

Select	First Name	Last Name	Company Name
<input type="checkbox"/>			
<input type="checkbox"/>			
<input type="checkbox"/>			

The **Mailing List** feature applies to **Mailing Addresses** only.

If you want to select all contacts from a particular city, state, zip code, or country, or all contacts of a particular Type, click the **Select Special** button. You will then be presented with a dialog where you can choose the field and enter the **Text to Match**. For example, if you want to select all contacts in Oregon, click the **State/Province** button, enter OR in the **Text to Match** field and then click the **Select** button.

You can also select all contacts that have a particular word in one of the **Miscellaneous** fields or the **Notes** field.

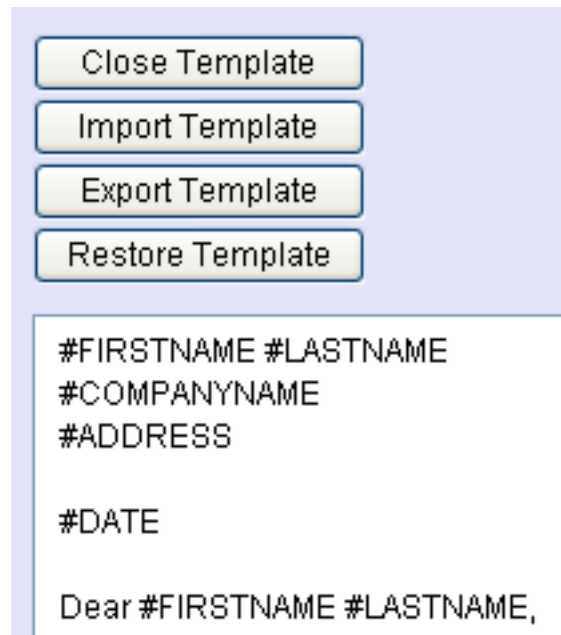
Click the **Export** button in the Contact Chooser window save a list of 1) a list of names and addresses you can print as **Labels** OR 2) **All Addresses** - names and addresses for use in another program OR 3) **Just E-mails** - a list of names and email addresses. Click **Help** in the Contact Chooser window for more information.

After making your selections, click the **Create Form Letter** button. The Send Form Letters window and the Mailing List Control window will open.

To change the name and address in the header, just select the text and type your correct info. Click **Help** for more information about editing the header and adding a logo.



At the top right of the Send Form Letters window, you will see an **Edit Form Letter Template** button. Click this button to view and edit the template for the form letter. You can make your letter as long as you want.



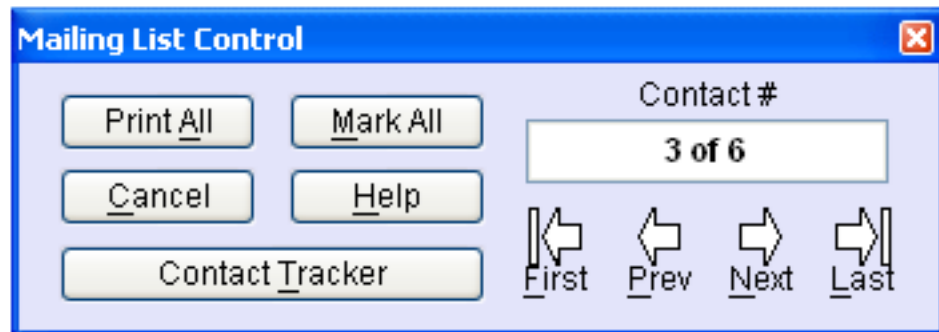
Wherever you want the program to insert the contact's first name, type #FIRSTNAME. If you want the program to insert the contact's last name, type the #LASTNAME tag. Wherever you want the contact's address, type #ADDRESS. Wherever you want the contact's company name, type #COMPANYNAME. Wherever you want the program to insert the date, type #DATE. See illustration to the left to see how this will look.

You can click the **Export Template** button to save the template for future use. To import a previously saved template, click the **Import Template** button. Click the **Restore Template** button to revert the template back to its original state. When you're done editing the template, click **Close Template**.

In the Mailing List Control window you will find a **Print All** button. Click this button to automatically generate printed letters to each contact.

Or, use the **Next**, **Last**, **Prev** or **First** buttons in the Mailing List Control window to generate a letter for each contact. Then, click the **Print** button in the Send Form Letters window to print each letter individually.

You can also click the **Copy to E-mail** button in the Send Form Letters window to send individual letters via e-mail.



The **Mark All** button in the Mailing List Control window will add the mailing date to either one of the **Miscellaneous** fields or the **Notes** field so you have a record of when you last sent the contact a letter. If you choose **Notes**, you can also add a note about the type of mailing.

The **Cancel** button in the Mailing List Control window will take you back to the Contact Chooser window.

You can also print envelopes from the Send Form Letters window by clicking the **Prepare Envelope** button. A **Return Address** field will appear along with **Print Envelope**, **Print All Envelopes** and **Restore Letter** buttons.

### **Adding Records to Contact Tracker**

1. Click the **New** button
2. Enter the **First Name**, **Last Name**, and/or **Company Name**
3. Enter the **Mailing Address**
4. Click the **Shipping tab** and enter the **Shipping Address**
5. Enter an **E-Mail address**
6. Add any number of **Phones/Fax/Pagers**
7. Choose a **Contact Type**
8. Enter any **Notes**, and **Family** or **Associates**
9. Use the four **Miscellaneous** fields for any purpose.

## **Contact Tracker's Report - List Contacts**

Easily create lists of contacts by clicking the **List Contacts** button in the Contact Tracker window.

Options			
<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Phones	<input type="checkbox"/> Misc Field 1	<input type="checkbox"/> Tax ID#
<input checked="" type="checkbox"/> Address	<input type="checkbox"/> Family	<input type="checkbox"/> Misc Field 2	<input type="checkbox"/> Cust #
<input checked="" type="checkbox"/> Company	<input checked="" type="checkbox"/> E-mail	<input type="checkbox"/> Misc Field 3	<input type="checkbox"/> Notes
		<input type="checkbox"/> Misc Field 4	<input type="checkbox"/> Translate

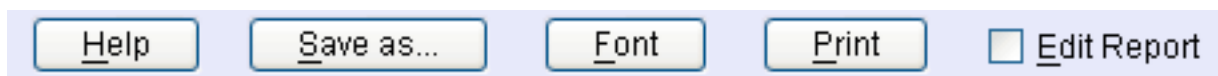
You can include any of the fields in Contact Tracker by enabling any of the **Options** at the top of the Contact List window. Choosing these options causes that type of information to be added to the report.

The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **First Name, Last Name, Company, Type, Misc 1, Misc 2, Misc 3, and Misc 4.**

Click any contact's name in the list to go directly to its record.

Easily generate a list of e-mails by choosing **ONLY** the **E-mail** option (or just the **Name** and **E-mail** options). You can sort this list by **Name** or by either **miscellaneous** field.

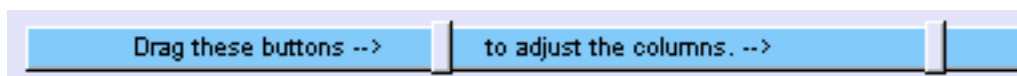
Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied with this program.



The font face, size, and line height of the list can be modified by clicking the **Font** button. You can print the Contact list by clicking the **Print** button. To save the list as a text file for importing into another program click the **Save as...** button.

Use the **Edit Report** button to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.



# Schedule Tracker

Each record in Schedule Tracker consists of the **Date of the Event (1)** , **Event Description (2)**, **Start and Stop Times (3a & 3b)**, **Location (4)**, and **Purpose (5)**.

The screenshot shows the Schedule Tracker form with the following fields and callouts:

- 1**: Date field with buttons "Find Date", "Today", and "Choose".
- 2**: Event Description field with a "Find Event" button.
- 3a**: Start Time field with an "Edit" button and a "Choose" button.
- 3b**: End Time field with an "Edit" button and a "Choose" button.
- 4**: Location field.
- 5**: Purpose field.
- 6a**: Repeat every field (set to 2 days) with a dropdown menu.
- 6b**: Until field with "Edit" and "Choose" buttons.
- 6c**: "Show Repeat Dates" button.

Use the **Click to Repeat** feature to keep track of any repeated events occurring at the same time each day, week, month or year. You can choose to have the event repeat **Daily, Weekly**, on **Week Days, Every Month, Yearly** or on a particular **Day of the Month** by using the **Click to Repeat** button (6a).

If the **Daily** or **Weekly** options are chosen, another field appears which will allow you to specify if you would like the event to repeat every (number of ) days or weeks.

The **Until (6b)** date field allow you to specify how long to repeat the event. View and edit the list of repeating dates by clicking the **Show Repeat Dates (6c)** button that appears after selecting a repeat option.

The **Start Time (3a)** and **End Time (3b)** fields are optional. If left blank the event will be listed first in the schedule for that day.

Keep notes of any length in the **Notes** field (7).

You can view your schedule for the **Month (8)**, **Week (9)**, or **Day (10)**, in a graphical format, by clicking one of these buttons.

The screenshot shows the Notes field and view buttons with the following callouts:

- 7**: Notes field.
- 8**: "View Month" button.
- 9**: "View Week" button.
- 10**: "View Day" button.

## Monthly View

Month January 2009 January - 12/28/08 to 01/31/09

Click a day of the month and then click the Weekly View or Daily View button at the

Sunday	Monday	Tuesday	Wednesday	Thursday
28	29	30	31	1

Click the **Monthly** button to see a monthly view of your schedule. The month that includes the **Date** on the current record is displayed by default. To display another month, use the **Prev Month** or **Next Month** buttons to the right of the calendar or choose a **Month** from the menu in the top left corner of the window.

Start Date Mon, Jul 20, 2009 Choose

You can also specify a **Start Date** for the Monthly View by clicking the small arrows in the top left corner and then clicking the **Choose** button. If you do not choose a Sunday, the nearest Sunday to the date you choose will be entered into the **Start Date** field. Clicking the small arrows button in the top left corner toggles back to the **Month** menu.

Help Weekly View Daily View Print

To see a **Weekly View** or a **Daily View**, click a day in the calendar and click one of the buttons at the bottom of the window. You can see all the appointments for any day from these windows.

You can **Print** the Monthly View window or change its colors by clicking the **Prefs** button. Click the **Save** button after making changes to the colors of the window.

If you make changes in Schedule Tracker with the Monthly View window open, you will need to click the **Refresh** button to update the window.

## Weekly View

Choose Week      July - 07/22/09 to 07/26/09

Click a header to see the Daily View. Click an appointment to open it. Click

	22 Wednesday	23 Thursday	24 Friday	25 Saturday
Misc. Events				
* = approx. red = conflict				
09:00 AM				
09:15 AM				
09:30 AM				
09:45 AM				
10:00 AM				

Click the **Weekly** button to see a weekly view of your schedule. The week that includes the **Date** on the current record is displayed by default. To display another week, use the **Prev Week** or **Next Week** buttons. You can also shift the dates by using the **Previous Two Days** or **Next Two Days** buttons below the calendar, or use the **Choose Week** button in the top left corner of the window.

Previous Two Days    Prev Week    Table Options    Next Week

To see a **Daily View**, click the header button for the day you want to see. Or click the **Daily View** button at the bottom of the window to go to the first day of the week.

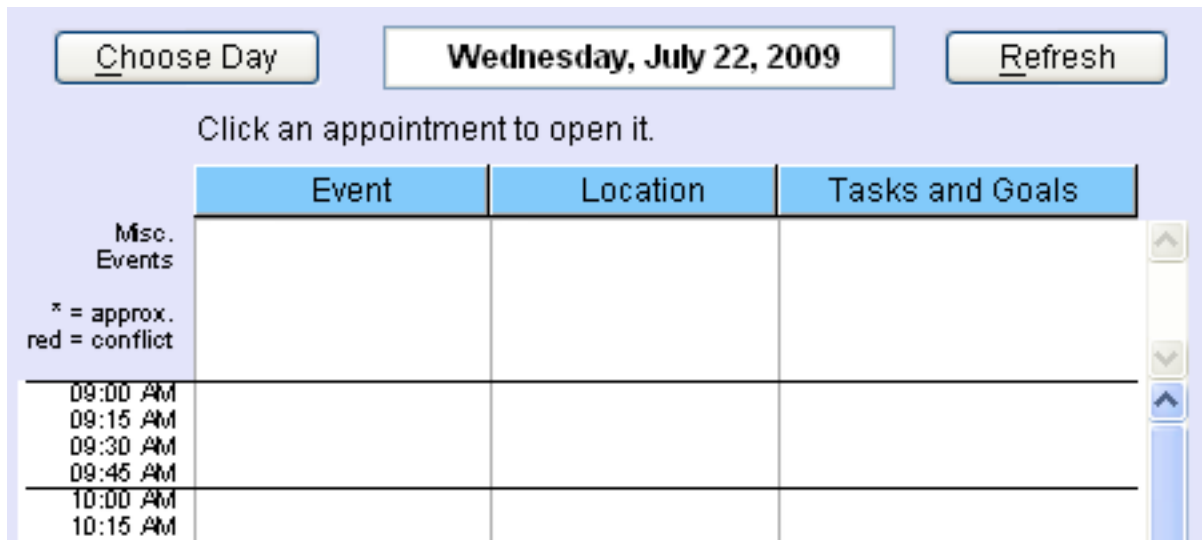
Monthly View    Daily View    Print

Click **Table Options** to specify the **Text Size** and start and stop times for the **Weekly View**. These times must be in whole numbers (ie 8:30 is not allowed). The start time can be either before or after noon, but the end time must be after noon. You can choose 5, 10 or 15 minute **Time Increments**. Events starting with an asterisk (\*) have been rounded to the previous time slot (for example if Time Increments has been set for 15 minutes, then an event scheduled for 11:50AM will be posted at 11:45AM).

You can **Print** the Weekly View window or change its colors by clicking the **Prefs** button. Click the **Save** button after making changes to the colors of the window.

If you make changes in Schedule Tracker with the Weekly View window open, you will need to click the **Refresh** button to update the window.

## Daily View



Click the **Daily** button to see a daily view of your schedule. The **Date** on the current record is displayed by default. To display another day, use the **Previous Day** or **Next Day** buttons below the calendar, or use the **Choose Day** button in the top left corner of the window.



Events listed in Red have conflicting events (two things are happening at once).

Click the **Table Options** button to change the three columns in the Daily View. The choices are:

**Single Booking** (conflicting appointments will be shown in red and the Location and Purpose of the appointment will be displayed),

**Single Booking & Tasks** (the Purpose column is replaced by your current Task List from Task or Goal Tracker),

**Double Booking & Tasks** (conflicting appointments are shown in the second column instead of the Location) and

**Triple Booking** (appointments that conflict with the first column are shown in the second and appointments conflicting with those in the second column are shown in the third).

**Table Options**

Single Booking  
 Single Booking & Tasks  
 Double Booking & Tasks  
 Triple Booking

Column Heading

Text Size  10 pt  11 pt  12 pt

List times between

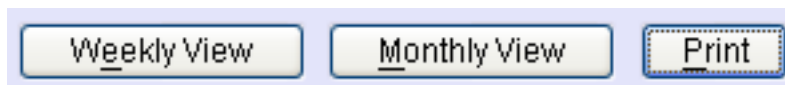
Time Increment  :05  :10  :15  :30

You can enter a new term for the second (and third) **Column Heading** in Double and Triple Booking modes if you prefer some other term besides "Conflict".

You can also specify the **Text Size** and the start and stop times for the Daily View in the **List times between** fields. These times must be in whole hour increments (ie 8:30 is not allowed). The start time can be either before or after noon, but the end time must be after noon.

You can choose 5, 10, 15 or 30 minute **Time Increments**. Events starting with an asterisk (\*) have been rounded to the previous time slot (for example if **Time Increment** has been set for 15 minutes, then an event scheduled for 11:50AM will be posted at 11:45AM).

You can **Print** the Daily View window or change its colors by clicking the **Prefs** button. Click the **Save** button after making changes to the options or the colors of the window.




If you make changes in Schedule Tracker with the Daily View window open, you will need to click the **Refresh** button to update the window.

## **Adding Records to Schedule Tracker**

1. Click the **New** button
2. Enter the **Date** by clicking **Today** or **Choose**
3. Enter the **Event Description**
4. Enter the **Location** and **Purpose**
5. Enter the **Start Time** and **Stop Time** if applicable
6. Choose an option from the **Click to repeat** menu if this is a repeating event
7. Enter any **Notes**

## **Schedule Tracker's Report - View Schedule**

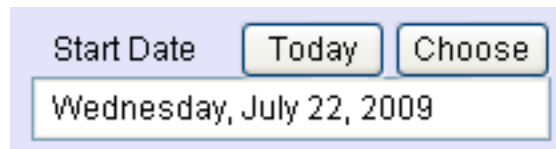
You can generate **Daily**, **Weekly** and **Monthly** schedules for viewing, printing or saving as text.



The screenshot shows a control panel with the following elements:

- List Options** label
- Radio buttons for **Day**, **Week** (selected), **Month**, and **Other**.
- Checkboxes for **Show All Times**, **Show Purpose**, and **Show Notes**.
- Text: "Click an event to go to its record."
- A **Translate** button.

You can choose from several **List Options**. Click the **Day**, **Week**, **Month** or **Other** radio button to switch between views. If you choose **Other** you will be prompted for an ending date.



The screenshot shows a text input field for the start date, currently containing "Wednesday, July 22, 2009". To the right of the field are two buttons: **Today** and **Choose**.

The **Start Date** field is automatically filled in. To change the date click the **Choose** button or click the **Today** button.

The **Show All Times** option will display all the hours for each day in addition to events for that day. This option is only available for **Days** or **Weeks**. You can change the range of hours displayed from the [Preferences](#) window. **Show Purpose** displays all Purpose notes. **Show Notes** displays all Event notes.

You can go directly to any event record by clicking any line with an event description in the schedule.

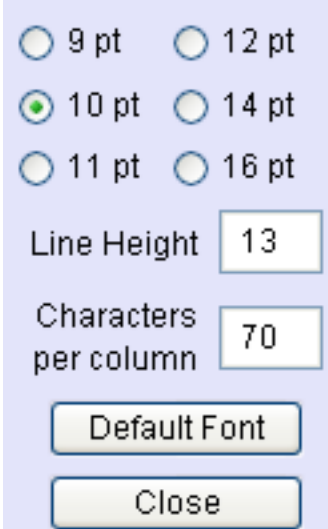
## **Report Output Modification**

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the [Translations screen in Preferences](#) or consult the translation tips file supplied with this program.

You can Print any schedule by clicking the **Print** button, or save it to a text file by clicking the **Save as...** button. You can then open this text file in your word processor or another program. You may also want to save schedules for archiving purposes.

Before printing you may want to adjust the font, size or line height of the report or invoice text by clicking the **Font...** button. Choose a new font by clicking its name in the font list. Change the font size by clicking one of the pt size radio buttons. Not all fonts are available in all sizes, so you may not notice a change. Click the line height field to enter a new number. The minimum line height is equal to the text size plus one (i.e., if the text size = 14 then the minimum line height = 15).

You may also want to adjust the **Characters per column** setting. If the **Show Purpose** option is enabled, each of the three right columns are limited to the number of characters specified here. If the **Show Purpose** option is NOT enabled, the **Event Description** column width is equal to twice the number of characters specified here. After adjusting the font, size or line height, you may need to also adjust the **Characters per column**.



The screenshot shows a dialog box with a light blue background. At the top, there are two columns of radio buttons for font size: 9 pt, 10 pt (selected), 11 pt, 12 pt, 14 pt, and 16 pt. Below the radio buttons are two input fields: 'Line Height' with the value '13' and 'Characters per column' with the value '70'. At the bottom, there are two buttons: 'Default Font' and 'Close'.

Close the Font dialog by clicking on **Close** button.

Close the [View Schedules](#) window by clicking on **Close Window** button when you are finished.

The **Help** button brings you to the Help window.

The **Save** button saves your schedule. All data is saved automatically when going to another record or window.

Use the **Edit Report** button to choose if you want to edit the text of the report or enable the ability to click a line of the report in order to go to that record.

Above the report field is a set of rectangular buttons that allow you to adjust the tabs (columns widths) of the report. Just drag any of these slightly left or right and after releasing the button the report will realign.

## Work Order Tracker

In Work Order Tracker, the **Date (1)** is entered when the record is created. Click **Add/Select Issuer (2)** to create or choose the issuer (usually your name).

The screenshot shows a form with the following fields and buttons:

- Issue Date:** A text input field with a blue circle '1' below it. Above the field are buttons for 'Today' and 'Choose'.
- Issuer:** A text input field with a blue circle '2' below it. Above the field is a button for 'Add/Select\_Issuer'.
- Start Date:** A text input field with a blue circle '7' below it. Above the field are buttons for 'Today' and 'Choose'.
- Work Order Description:** A text input field with a blue circle '3' below it. Above the field is a button for 'Find WO'.
- Start Time:** A text input field with a blue circle '10' below it.
- Hours:** A text input field with a blue circle '11' below it.
- End Time:** A text input field with a blue circle '12' below it.
- Vendor:** A text input field with a blue circle '4' below it. Above the field is a button for 'Add/Select\_Vendor'.
- Unit:** A text input field with a blue circle '9' below it. Above the field are buttons for 'Select\_Bldg' and 'Select\_Unit'.
- Notes to Vendor:** A text area with a blue circle '5' below it. Above the field is a checkbox labeled 'Add to WO' which is checked.

Enter a short **Work Order Description (3)**. This will appear in calendars. You can use the **Find WO** button above this field to locate other work orders in the database

Click **Add/Select Vendor (4)** to add or choose a Vendor from a list you create. A longer description of the problem can be entered into the **Notes to Vendor (5)** field.

Select a **Priority** (not shown) for the work order. The **Work Order #** is automatically assigned, but can be changed if you wish.

Select a **Job Type** (also not shown) (the choices are **Cleaning, Electrical, Install, Painting, Plumbing, and Repair**). You can add other Job Types by choosing **Add Type**. To remove a Job Type from the list, select it and then select **Delete Type**.

Select the Building or **Unit (9)** that needs the work by clicking **Select Bldg** or **Select Unit**.

After making an appointment with the Vendor, make a note of the agreed upon date in the **Start Date field (7)**, the anticipated **Start Time (10)**, and either the number of **Hours (11)** estimated or an **End Time (12)**.

Click the **Create Work Order** button (**13**) to create a Work Order to **Print** and mail (or Email) to the Vendor. To view a previously created WO click **View Work Order (14)**.

The image shows two buttons:

- Button **13**: **Cr\_eate Work Order**
- Button **14**: **Vi\_ew Work Order**

Completion Date

Permission to Enter if Not Home

Labor Total  Materials Total

Taxes  Total Amount

(21)

Notes Regarding Repairs  Add to WO

When the work is completed, fill in the **Completion Date (15)**, any **Notes Regarding the Repairs (16)** or maintenance, the **Labor Total (17)**, **Materials Total (18)**, any **Taxes paid (19)**, the **Total Amount (20)** of the Invoice, and the **Invoice #** (located below the Job Type menu). Then click **Add to Expense Tracker (21)** when you are ready to pay the invoice.

View  (22)  (23)  (24)

Work Order Tracker records are added to the Schedule Tracker records and displayed on the **Month (22)**, **Week (23)** and **Daily (24)** calendars.

Click the **Work Order Report** button to create a report of all your orders.

## **To Add Records to Work Order Tracker**

1. Click **New** and enter a brief **Work Order Description**.
2. The **Issue Date** is entered automatically. Click **Add/Select Issuer** to pick an issuer (usually your name).
3. Select a **Priority** for the work order.
4. Select a **Job Type**
5. Click **Add/Select Vendor** to add or select a person or company to do the work.
6. After determining who is available, you can agree on and enter a **Start Date**, **Start Time**, and either the number of **Hours** the job is likely to take, or an **End Time**.
7. Select a Unit or Building by clicking **Select Bldg** or **Select Unit**.
8. Add any **Notes to Vendor** about the job and then click **Create Work Order** at the bottom of the screen. Click **View Work Order** to see previously created work orders.
9. When the job is complete, enter a **Completion Date**, any **Notes Regarding Repairs**, the **Labor Total**, **Materials Total**, **Taxes** and **Total Amount** paid. You can also record the Vendor's **Invoice #**.
10. Click Add to **Expense Tracker** to create a Rental Expense Tracker record for the **Total Amount**.

## **Work Order Tracker Report Options**

The screenshot shows a web interface for configuring report options. It includes the following elements:

- Start Date:** A text input with "Jan 1" and a "Choose" button.
- End Date:** A text input with "Today" and a "Choose" button.
- Dates:** A section with a "Choose Dates" dropdown menu and three radio buttons: "Issue Dates" (selected), "Start Dates", and "Completion Dates".
- Units:** A section with a checked "All Units" checkbox and two buttons: "Select Bldg" and "Select Unit".
- Empty Fields:** There are two empty text input boxes, one below the "Start Date" and "End Date" fields, and another below the "All Units" checkbox.

You can choose any range of **Dates**, and specify which date field to use. For example, if the date range is set to April 1 to 30, and the Issue Date is in March 28, the Start Date is April 25 and the Completion Date is May 2, then you can see how selecting **Issue Dates**, **Start Dates** or **Completion Dates** options will generate very different reports.

Click **Select Bldg** or **Select Unit** to create a report for only one building or unit.

Choose to add any of the fields in the **Options** list to your report and then **Sort By** any of several fields. Click **Create Report** to generate the report.

# Task or Goal Tracker

Each record in Task or Goal Tracker consists of:

The date the task was **Entered (1)**, the **Deadline (2)**, the Date **Completed (3)**, the Task **Priority (4)**, a **Category (5)**, the **Task or Goal Description (5)**, and Task **Notes**

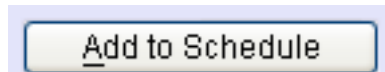
The screenshot shows a form with two columns. The left column has three rows: 'Entered', 'Deadline', and 'Completed'. Each row has a text input field with a blue circle containing a number (1, 2, and 3 respectively) overlaid on it. Above each input field are two buttons: 'Today' and 'Choose'. The right column has three rows: 'Priority', 'Category', and 'Task or Goal Description'. The 'Priority' row has a dropdown menu showing 'High' with a blue circle containing the number 4. The 'Category' row has a dropdown menu showing 'Choose Category' with a blue circle containing the number 5. The 'Task or Goal Description' row has a text input field with a blue circle containing the number 6.

When you click the **New** button to add a record to Task or Goal Tracker the **Entered** date will automatically be filled in. You can change this date if you wish by using the **Today** or **Choose** buttons above the field.

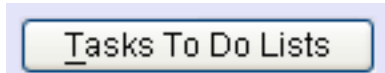
You can select a **Priority** from the pull down menu. The choices are **Urgent, High, Medium** and **Low**. You can also select a **Category** from a list you create. Just select **Add Category** and enter a short description of a To Do list you want to create.

Next enter a **Task or Goal Description**. You may also enter any **Notes** before, during or after the task is completed. If the task has a deadline, enter that date into the **Deadline** field. When the task is completed, fill in the **Completed** field.

You can easily add a task to Schedule Tracker by clicking **Add to Schedule**.



View a list of tasks by clicking **Tasks To Do Lists**.



## To Add Records to Task or Goal Tracker

1. Click the **New** button
2. Enter the **Deadline** and choose a **Priority**
3. Enter the **Task Description** and any **Notes**

## **Task or Goal Tracker's Report - Tasks To Do Lists**

Easily create lists of tasks by clicking the **Tasks To Do Lists** button in the Task or Goal Tracker window.

You can list **All Tasks, Uncompleted, Completed** or just **Urgent Tasks** by clicking the appropriate radio button at the top of the Tasks To Do Lists window.



**List Options**

Urgent Tasks  
 Uncompleted  
 All Tasks  
 Completed

The list can show just the task description and priority, or you can choose to show **Deadlines, Categories** and **Dates Entered**. You can also choose **All** categories or just one by deselecting the **All** option. A list of categories will be presented to choose from.



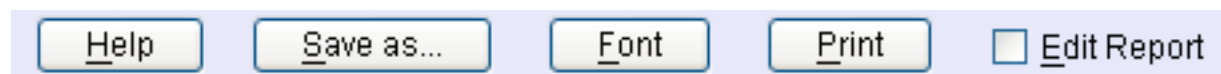
Deadlines    Categories   **Sort By**    Category  
 Dates Entered    All    Priority    Deadline  
 Notes    Translate    Task    Date Entered

The list can be sorted by clicking one of the **Sort By** radio buttons. The choices are **Priority, Task, Category, Deadline,** and **Date Entered**.

Between the **Priority** and **Task** columns in the report is a row of checkboxes. [x] indicates the task is already completed and [ ] indicates that the task still needs to be done. After printing a report you can use these boxes to check off completed tasks.

Priority		Task
Urgent	[ ]	Final
High	[ ]	Finali
Medium	[ ]	Revis

Click the **Translate** button to translate the report into another language. You must import or create a translation list first. For more information click the **Help** button on the Translations screen in Preferences or consult the translation tips file supplied.



To save the list as a text file for importing into another program click **Save as...**

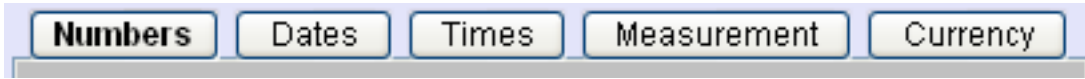
The font face, size, line height and tab stops of the list can be modified by clicking the **Font** button. You can print the task list by clicking the **Print** button.

To edit the report before printing, click the **Edit Report** button in the Tasks To Do Lists window. To make the report so you can click an item to go to its record, just click the **Edit Report** button again.

If the **Edit Report** button is not enabled you can click on any task to go to that record.

# Universal Calculator

The Universal Calculator consists of five different calculators. Use the buttons along the top of the window to switch between them.



The **Numbers Calculator** is an easy to use program that operates similar to your average calculator.

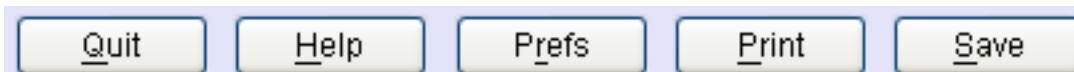
This **Dates Calculator** allows you to easily add or subtract any number of days from any date.

The **Time Calculator** calculates the difference between times or adds a list of times, and the **Time Zones Calculator** calculates time differences between major cities.

The **Measurement Calculator** converts any length, volume or weight to the standard you need.

The **Currency Calculator** consists of the **Discounts & Sales Tax** calculator, the **Money Exchange** calculator and the **Payments** calculator.

On the bottom of each calculator window you will find the following buttons:



**Quit** button saves the data and quits the program.

To access the integrated help system, click on the **Help** button.

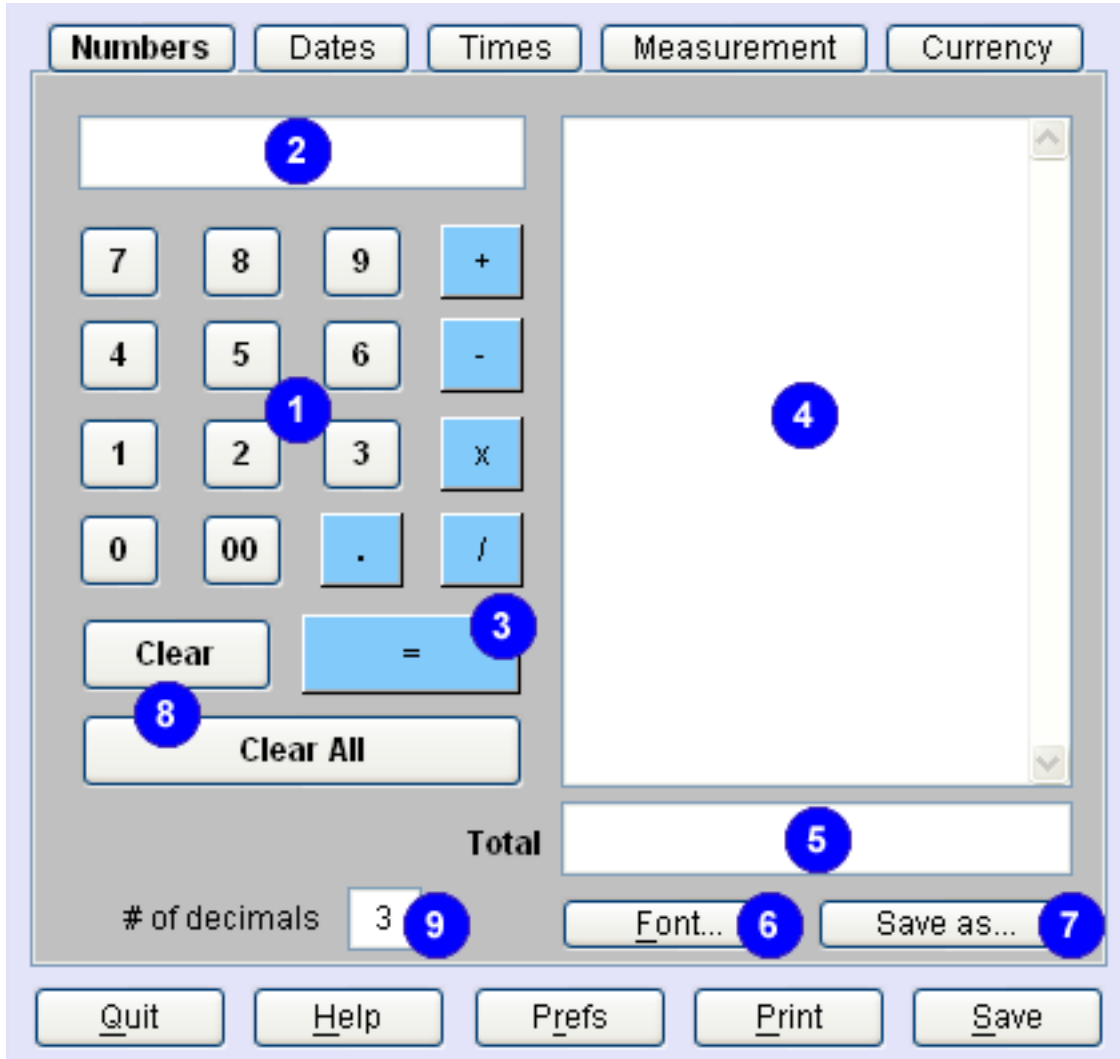
To access the Preferences window, click the **Prefs** button. You can change the highlight, button and background colors, time format, etc.

Click the **Print** button to print the current calculator window.

The **Save** button saves your data. All data is saved automatically when going to another calculator or when you quit the program.

## Numbers Calculator

The **Numbers Calculator** is an easy to use program that operates similar to your average calculator.



You can enter **Numbers (1)** and Operators (+, -, \*, x, /, =) by clicking the buttons or by using the keyboard. For your convenience, both the x key and the \* (shift 8) key perform multiplication. The number being entered appears in the top field **(2)**. To generate results simply use the return/enter keys or click the = button **(3)**.

The Tape field **(4)** displays each line of your calculation just like an adding machine "tape". Click the **Save as...** button **(7)** to export the Tape field as a text file so that you can open it in another program. Click the **Print** button to print the Tape field.

If you make a mistake while entering a number, click the **Clear** button **(8)** to clear the calculator. Click the **Clear All** button to clear all fields.

You can copy the the **Total** field (5) by clicking the field and pressing ctrl + C (or Command + C on the Mac). You can then paste the number into some other program.

You can change the font face and size of all the fields by clicking the **Font** button (6). You can change the number of decimal places by entering a different number in the # of decimals field (9). For instance, if you are calculating dollars, then 2 decimal places makes sense (12.34). For more accuracy, you can change the number of decimals to a higher number (i.e., 5 would result in numbers like 12.34567).

## **Dates Calculator**

The screenshot shows the 'Dates' tab of a calculator application. It features two main sections: 'Add or subtract days from a date' and 'Day/Week of Year Calculator'. Both sections have 'Help' and 'Reset' buttons. The 'Add or subtract days from a date' section includes buttons for 'Today', 'Choose', and 'Edit' above a 'start date' field (1). Below this is a 'days' field with the value '7' and a dropdown arrow (2), followed by 'Add' (3) and 'Subtract' buttons. A 'result' field (4) is at the bottom. The 'Day/Week of Year Calculator' section has 'Today', 'Choose', and 'Edit' buttons above a 'date' field (5). Below are four fields: 'day of year' (6), 'days left in year', 'week of year', and 'weeks left in year' (7).

Enter a **start date** (1) by clicking the **Today**, **Edit** or **Choose** button above the field. Then enter the number of **days** (2) or choose a number from the option menu (2). By clicking the **Add** or **Subtract** button (3), your answer will appear in the **result** field (4).

To find out the day and week of the year for a particular date, simply enter a **date** by clicking the **Today**, **Edit** or **Choose** button above the **date** (5) field. The other fields will be filled in automatically (6 & 7).

## Time Zones

The **Time Zones Calculator** calculates different times between major cities.

The screenshot shows the 'Time Zones Calculator' interface. At the top, there are navigation buttons for 'Numbers', 'Dates', 'Times', 'Measurement', and 'Currency'. The 'Times' button is selected, and the 'Calculations' sub-tab is active, indicated by a blue circle with the number '6'. Below the navigation is a header 'Find out what time it is anywhere.' with 'Help' and 'Reset' buttons. Instructions state: 'Choose a local time and then pick a city from the list on the left. Then choose a city from the list on the right.' The interface is divided into two columns. The left column has a 'Local Time' field (1) with 'Edit' and 'Now' buttons. Below it is a 'Daylight Savings Time' checkbox (2). A city list (3a) on the left shows 'Adelaide' selected (3a), with the chosen city 'Adelaide' displayed in a field (3b). The right column has a 'Destination Time' field (5a) with radio buttons for 'Yesterday', 'Today' (5b), and 'Tomorrow'. Below it is another 'Daylight Savings Time' checkbox. A city list (4a) on the right shows 'Amsterdam' selected (4a), with the chosen city 'Amsterdam' displayed in a field (4b).

Enter a **Local Time** (1) by clicking the **Now** or **Edit** button. Then select a city in your time zone from the list on the left (3a). Your choice is displayed (3b).

If either the **Local Time** or **Destination Time** is currently observing **Daylight Savings Time**, click the checkbox below the time fields (2).

Then select a city from the list on the right (4a). If the city you want is not in the list, pick a city that is in the same time zone. Your choice is displayed (4b).

The time for the city on the right will be displayed in the **Destination Time** field (5a). The relative date for the destination time is displayed by the highlight of the **Yesterday**, **Today** and **Tomorrow** buttons (5b).

Click the **Calculations** button (6) to add and subtract times.

## Time Calculator

This **Time Calculator** calculates the difference between times or adds a list of times.

The screenshot shows the 'Time Calculator' interface. At the top, there are five tabs: 'Numbers', 'Dates', 'Times' (which is selected), 'Measurement', and 'Currency'. Below these, there are two sub-tabs: 'Time Zones' and 'Calculations' (which is selected). The main heading reads 'Find out the difference between two times or add list.' with a 'Reset' button to its right. Below the heading, there is instructional text: 'Enter a Start Time and an End Time and click Calculate Difference. Or enter a list of times in the field to the right and click Add List. Times must be in the hr :min format.' The interface features several input fields and buttons: 'Start Time' (1) and 'End Time' (2) fields, each with a 'Choose' button below it; a 'Calculate Difference' button (3); a large text area for entering a list of times (4); an 'Add List' button (5); and three output fields: 'Hrs:Mins' (6a), 'Hrs (fractional)' (6b), and 'Hrs Mins (long format)' (6c). A 'Reset' button is also present in the top right corner of the main panel.

Enter the **Start Time (1)** and the **End Time (2)** and click the **Calculate Difference** button (3). The result will be displayed in three formats, **Hrs:Mins (6a)**, **fractional hours (6b)** and a **long format (6c)**.

To add a list of times, type the list into the field provided (4) and click the **Add List** button (5). The result will be displayed in three formats, **Hrs:Mins (6a)**, **fractional hours (6b)** and a **long format (6c)**.

## **Measures Calculator**

Use this handy calculator to convert temperatures, areas (square ft, m, etc.), length, volume or weight to the standard you need.

The screenshot shows a web-based calculator interface with a light blue border. At the top, there are five buttons: "Numbers", "Dates", "Times", "Measurement" (which is highlighted in bold), and "Currency". Below these, there are two tabs: "Temp / Area / Length" (which is selected) and "Volume / Weight".

The "Temp / Area / Length" section is divided into three sub-sections, each with a "Help" and "Reset" button:

- Temperature:** A label "Temperature" is followed by a text input field, the text "degrees Fahrenheit =", another text input field, and the text "degrees Celsius".
- Area (square ft, m, etc.):** A label "Area (square ft, m, etc.)" is followed by text input fields for "inches", "feet", "miles", "cm", "meters", and "km".
- Length:** A label "Length" is followed by text input fields for "inches", "feet", "miles", "cm", "meters", and "km".

Just click on any field in any section and enter a number. The corresponding fields will be filled in automatically.

You can calculate **US** or **Imperial** (British) **Volumes** or **Weights**. Clear all fields in the section by clicking the **Reset** button.

Click the **Volume / Weight** tab to access these sections.

The screenshot shows a software interface with a top navigation bar containing five tabs: Numbers, Dates, Times, **Measurement**, and Currency. The **Measurement** tab is active, and within it, the **Volume / Weight** sub-tab is selected. The interface is divided into two main sections: **Volume (Liquid)** and **Weight (AVDP)**. Each section has radio buttons for 'US' (selected) and 'Imperial', and 'Help' and 'Reset' buttons. The Volume section includes input fields for oz, quarts, gals, ml, liters, and kl. The Weight section includes input fields for oz, lbs, tons, g, kg, and mtons.

Section	Unit	Input Field
Volume (Liquid)	US	oz
	US	quarts
	US	gals
	Imperial	ml
	Imperial	liters
	Imperial	kl
Weight (AVDP)	US	oz
	US	lbs
	US	tons
	Imperial	g
	Imperial	kg
	Imperial	mtons

## Currency Calculator - Discounts & Sales Tax

The handy currency tool that calculates everything from **Discounts & Sales Tax (1)** to **Money Exchange (2)** to **Payments (3)** and Amortizations.

The screenshot shows the 'Discounts and Sales Tax' section of the Currency Calculator. It includes a 'Percent Discount' dropdown menu (4) with '0' selected, a 'Sales Tax' dropdown menu (5) with '.075' selected, a checked checkbox for 'Compute Tax on Sub Total' (6), and an unchecked checkbox for 'Fixed discount instead of percent' (7). There are two buttons: 'Compute Total from Amount' (8) and 'Compute Amount from Total' (9). On the right side, there are input fields for 'Amount' (10), '- Discount' (11), 'Sub Total' (12), '+ Sales Tax' (13), and 'Total' (14). There are also 'Help' and 'Reset' buttons.

You can figure discounts and sales tax by using the **Discounts & Sales Tax** calculator. You can use the **Percent Discount** menu (4) by picking a preset amount or by choosing Other and typing a number.

**Pick a Sales Tax (5)** from the drop down menu or by choosing Other.

Enter a number into the **Amount** field (10) by either clicking that field or the **Compute Total from Amount** button (8). All the other fields will automatically be filled in.

You can also enter a fixed discount by clicking the **Discount** field (11). After entering a new discount amount a new total will be calculated. Clicking the **Fixed discount instead of percent** button (7) performs the same function.

Normally tax is computed on the **Sub Total** amount, but sometimes you may want the tax computed on the original amount. If this is the case, uncheck the **Compute tax on Sub Total** button (6). A new total will be calculated.

Use the **Compute Amount from Total** button (9) to calculate the amount, discount and sales tax from a specified total. After clicking this button, you will be asked for a total and then all the other fields will automatically be filled in. You can also perform this function by clicking the **Total** field (14).

## Currency Calculator - Money Exchange

With the Currency Calculator you can convert any currency to any other currency. All you need to provide is the amount and the exchange rate.

Money Exchange

2a Rate Info Help Reset

\$ Amount Exchange rate Currency type Other Amount

1 2 4 3

Enter an Amount and then click a line to choose a Currency Type.

Currency	In US Dollar	Per US Dollar
Argentine Peso	0.26323	3.79900
Australian Dollar	0.78598	1.27230
Brazilian Real	0.5327	1.98700
British Pound	1.50901	0.62150
Canadian Dollar	0.85992	1.16290
Chinese Yuan	0.14642	6.82960
Euro	1.39121	0.71880

Edit List

Enter the number of dollars (or other currency) that you want to convert into the **\$ Amount** field (1).

Click the **Exchange rate** field to enter an exchange rate. For instance, if you get 4.5 of the other currency for each dollar, enter 4.5 into the **Exchange rate** field (2). Click the **Rate Info** button (2a) for a link to a web page listing current exchange rates.

The **Other Amount** (3) will be automatically entered after completing steps 1 and 2.

You may also enter a number in the **Other Amount** (3) field to calculate the number of dollars. The **\$ Amount** field (1) will automatically be updated.

Enter the **Currency type** if desired (4).

You can click any line in the bottom field (5) to automatically enter that currency.

## Currency Calculator - Payments

You can calculate loan payments and future values of investments with this calculator. You can also figure the total number of months before an amount is paid off.

To calculate Monthly Payments, fill in the **Loan Amount (1)**, the number of **Years (2)** or **Months (3)** to pay, and the **Annual Interest Rate (4)**. The **Monthly Payments (5)**, **Total Payments (6)** and **Total Interest (7)** will be automatically calculated.

Choose either **Simple** or **Compound** interest by clicking one of these **(8)** options.

You can change the **Loan Amount** or length of the loan and then click the **Payments** button **(12)** to get a new calculation.

Click the **Show Schedule** button **(9)** to see a list of the payments and how fast the balance changes.

If you want to know how long it will take to pay for (amortize) an investment, enter the **Initial Cost (1)**, any Interest paid **(4)** and how much per month you are paying **(5)** and the **Months to Pay (3)** will be calculated. You can change the **Loan Amount** or **Monthly Payments** and then click the **Months** button **(11)** to get a new calculation.

For example, I'm considering purchasing a solar electricity package for my home. If I know the initial cost is \$20,000 and my Monthly Payments average about \$300 then if I figure 7% interest for the loan, I can find out that it will take me 85 months to pay for the new equipment.

You can also find out how much an investment will be worth in the future. Just fill in any **Initial Value (1)** the number of **years (2)** and/or **months (3)** into the future you want to project, and the amount you'll contribute to the fund each month **(5)**. Then click **Amount (10)**.

For example, if you have a mutual fund that has \$2000 in it (Initial Amount) and you get an average return of 12% (Annual Interest Rate) and you want to know what it will be worth in 10 years (enter 10 in the Years field and press Enter) and you add \$100 a month to the fund (Monthly Payments), when you click the Amount button, you will discover that the fund will have a Future Value of over \$45,200.

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We hope you are enjoying using *Commercial Rental Tracker Plus*. Please drop us a line if you have any suggestions for ways to make the product even better.

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