Briefcase v4.02
Installation & User Guide

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Contents

About

The following guide will help you get started quickly by briefly covering some of the key concepts behind the functions and features that Briefcase offers.

Briefcase is extremely flexible and will allow you to use its features in a variety of ways and in a logical sequence. This guide and examples are intended to show you the best practice approach so you can start using the software with confidence.

Welcome

How Briefcase works

Briefcase makes it easy to manage and keep track of all information relating to your projects, from the people involved and their contact details to the rates you charge and even the time spent on different activities.

Briefcase is a relational database – in layman's terms, this is a mechanism for drawing together lots of related information in all sorts of ways.

As you'll see as you explore Briefcase, there are nine key areas to the application, covering every aspect of creative project management.

Briefcase can be setup to suit a variety of environments. From a single user to a multi site office with hundreds of users. Briefcase can be accessed remotely from any location with internet access. And, because it is Mac and Windows friendly you can share data with everyone.

Briefcase Suite

Briefcase Starter Edition

Briefcase Starter Edition is a single user version ideal for freelancers, small studios and consultancies.

Briefcase Professional Edition

Briefcase Professional Edition is the Job management solution for those who need to manage Jobs in a studio / agency environment. Includes additional features like, multiple user access, customised reports and in-built pdf and excel exporting, remote access and the ability to create and edit your own templates.

Briefcase Enterprise Edition

Briefcase Enterprise Edition is the Job management solution for agencies across multiple sites that require shared data or departmental access.

Briefcase Attaché

Briefcase Attaché is an easy to use time entry tool for your creative team. Attaché allows team members to see what tasks they have been assigned, which Jobs they are assigned to and their time sheet records.

Installation

Briefcase Starter Edition

Installing Briefcase

Installing Briefcase is simple. Once you have downloaded the software or obtained the CD, open the zip file and extract the contents to your applications folder. When the files have transferred start Briefcase by clicking the application icon.

Briefcase (All Other Editions)

If you are using Briefcase Starter Edition, the information here does not apply. You can skip to the section titled Getting Started on page 9.

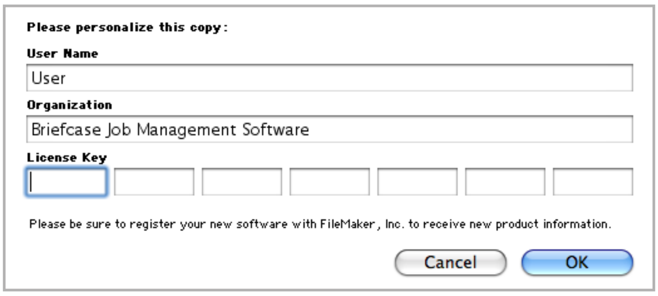
Before using Briefcase, you must install FileMaker on all users' computers.

Installing FileMaker

Briefcase comes bundled with FileMaker. Simply launch the FileMaker Installer supplied with Briefcase and follow the on screen instructions.

For detailed instructions on installing FileMaker, consult the documentation included with your FileMaker software.

IMPORTANT: When installing FileMaker you must enter the organisation name as 'Briefcase Job Management Software'. It is a requirement of the Solution Bundle Agreement between Briefcase and FileMaker that this is the organisation name. Your company is still the registered owner.

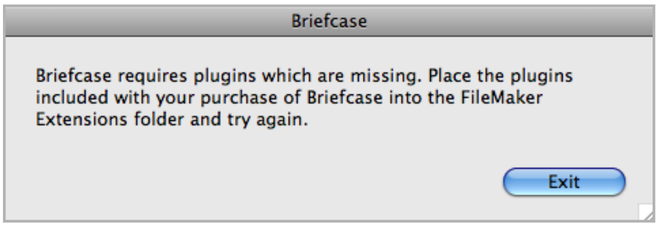


Installing Required Plug-ins

Your Briefcase folder contains plug-ins required to run Briefcase, these can be found in the 'Extensions' folder.

- EventScript
- MBS NewID
- SimpleDialog
- SimpleFile

These plug-ins must be moved to the FileMaker Extensions folder before you can start using Briefcase. If they are not installed you will see the following error when launching Briefcase.



Once your plug-ins have been installed into the proper location click the Briefcase application icon to start.

Installing FileMaker Server

It is recommended that all multi user environments also install FileMaker Server. If you have more than 9 users you will be required to do so.

For detailed instructions on installing FileMaker Server and hosting databases, consult the documentation included with your FileMaker Server software.

Installing Briefcase without FileMaker Server

Once the FileMaker installation process is completed, place the Briefcase folder in your desired location on your computer.

1. Click the Briefcase application icon to start.
2. To share Briefcase over a network (via peer-to-peer sharing), make sure FileMaker sharing is turned on.
3. File... Sharing... FileMaker Network
4. Turn sharing on

Other users can connect to Briefcase by following the steps below.

1. Start FileMaker
2. Select File... Open Remote
3. If you have installed Briefcase correctly, you will be able to see the host. Select the host.

4. Open Briefcase

Note: Peer-to-peer sharing requires Briefcase and it's associated files to remain open on the host computer at all times.

Installing Briefcase with FileMaker Server

After you have installed FileMaker Server and uploaded the database you can launch Briefcase by following the steps below.

1. Start FileMaker

2. Select File... Open Remote

3. If you have installed Briefcase correctly, you will be able to see the host. Select the host.

4. Open Briefcase

Helpful Hint: For further reading on installation and up to date instructions please visit the website support page.

Getting Started

Getting Started

Launching Briefcase

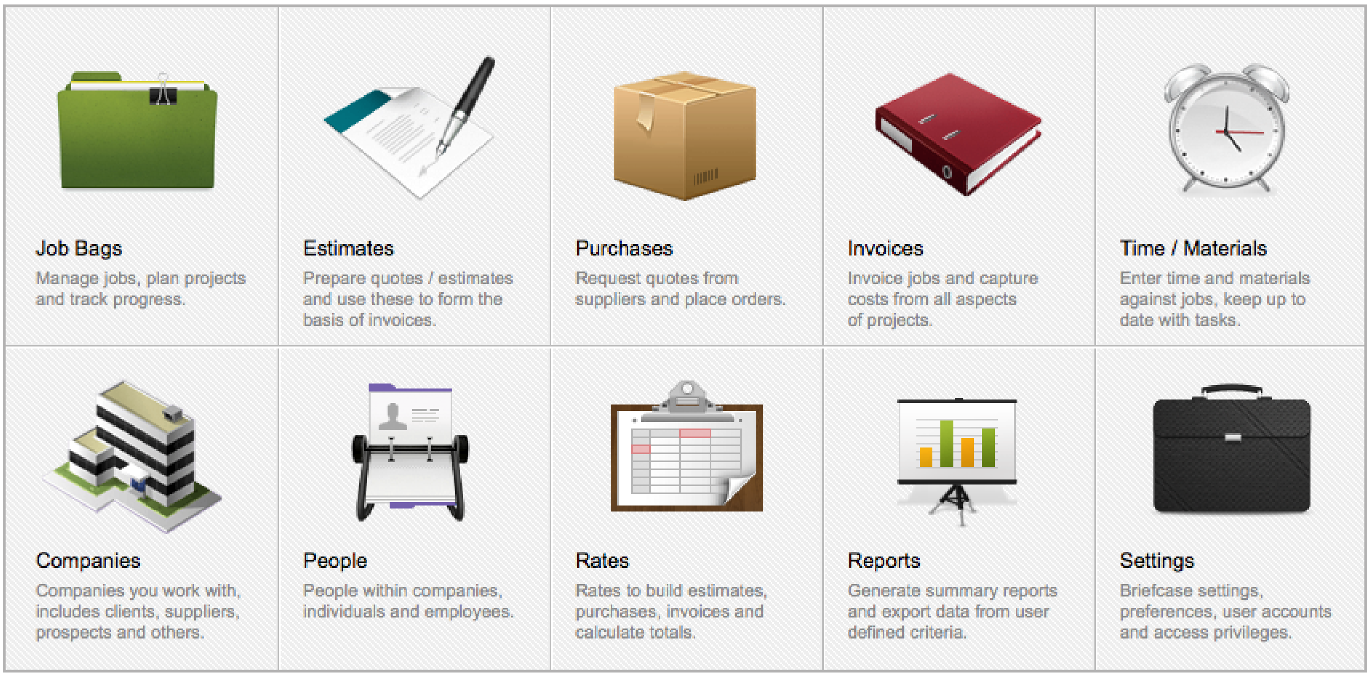
The first time you launch Briefcase, you will be required to complete the setup procedure. This will guide you through setup and create your user login account.

After the setup process is complete you are presented with the login screen. Complete the fields with the account information that you entered during setup to advance to the main menu.

First Steps

You can start entering data in any order, however there are some dependencies between the different parts of Briefcase so it is recommended that you initially enter data in the following order:

1. Define Rates you will use to charge clients
2. Enter Companies and Contacts you work with
3. Create Job Bags
4. Create Estimates and Purchases
5. Enter Time and Materials
6. Create Invoices



Navigation

Enter a window by clicking the menu icon. At the top of each Briefcase window, you will see nine tabs: Companies, Contacts, Job Bags, Estimates, Purchases, Invoices, Time and Rates.

To navigate to a different Briefcase window, click on the tab for the window you wish to view next.

To return to the main menu click the Briefcase logo on the far right of your screen.

To return to a previously viewed Window

Click the Back button on the top of the current window to return to the previous window. (You can do this as many times as you like to scroll back through Briefcase).

To move from List View to Detail View

Each Briefcase Window can be viewed in either List View or Detail View.

List View displays a list of current found records.

Detail View displays an individual record.

You can change how you view your records at any stage by clicking the List/Detail button .

To move through records

Click the Back or Forward arrow on the top left hand of the window to move up or down a list of records. Alternatively, you can click the record you wish to access whilst in list view.

Keyboard Shortcuts

Action	Shortcut
To exit detail view and return to List View	Press the Esc key
To move through records	Press the up and down, and left and right arrows
To enter a record in List View	Press the Return/Enter key
To move across fields in a record	Press the Tab key
To go back a screen	Type \
To go to Job Bags	Type J
To go to Estimates	Type E
To to go to Companies	Type C
To to go to Time	Type T
To to go to Purchases	Type P
To to go to Invoices	Type I
To to go Contacts	Type L

Companies

Companies

The Companies Window contains the business details of all your company contacts, whether they are suppliers, clients, client/suppliers, prospects or other.

List View

List View displays a list of current found records. By default, List View shows a filtered list of company records. (This setting can be changed at any time in the Settings Window).

Click All to display a list of all company records.

Sorting the Companies List

To sort the Companies List, click the appropriate column header. You can sort by company type, company name, city, state, postcode or country.

Filtering the Companies List

Click the Filter menu Client to filter the Companies List. Only records of the type you select will be displayed.

Finding a company record

The Find function makes it easy to search for a company in a database that may contain hundreds of entries.

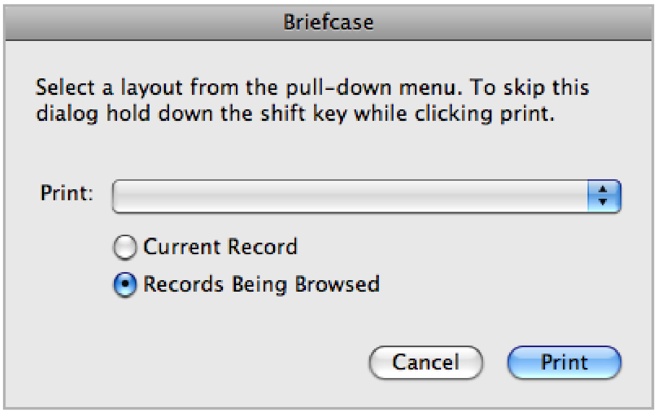
To find a particular company record, click the Find button Find .

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the '*Finding Records*' section on page 48 of this Guide for more information about performing complex Finds.

Printing a company record

Click the Print Button Print . This will bring up the print dialogue where you can select an appropriate print layout from the pull down menu.



The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the '*Creating/Editing Layouts*' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting a company record

To delete the current record, press the Delete button Delete .

Creating a new company record

To create a new company record, click the New button. This action will take you to the new record in Detail View (see next page) where you can enter the company's details.

Locking a company record

To lock a record, press the Lock button. Once locked, a record cannot be modified by other users without locking privileges.

Note: depending on your access privileges you may not have the option to use the Lock feature.

To view details of a company record

Click in the Company row to go to the Company record in Detail View.

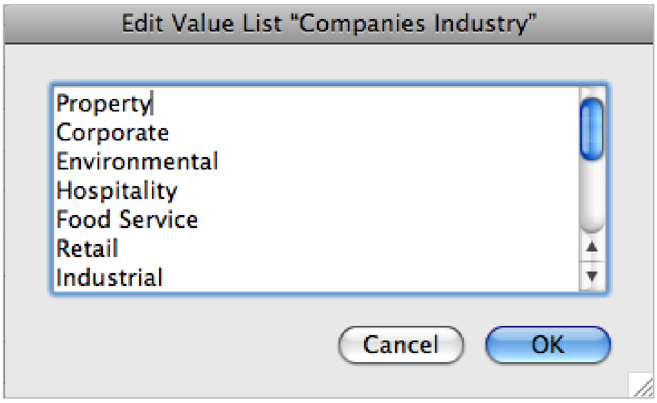
Detail View

Detail view allows you to populate a new company record or edit an existing record.

Details

When creating a new company record, you will be prompted to select the company type (Client, Prospect, Client/Supplier or other) from a drop down list. Enter the company name beside the company type.

You can also record information like the company number, industry and group. These fields are customisable so you can use them for any type of information you wish to record. You can also edit the default menu options in these fields by clicking the Edit menu option and defining the list in the Edit Value list dialogue.



Job Settings

If you choose to number your Jobs with a prefix (eg. HAR123), enter a unique character prefix in this field.

Settings			
Job Prefix	MET	Job Count	002
Rate Tier	Standard	Tax	GST
Terms	30 days from invoice date	Company ID	1215

Set the company rate tier from the drop down menu that appears when you click on the Rate Tier field. This value assigns the appropriate Rate Tier for this company from details already filled in on the Rates Window. See the 'Rates' section on page 41 of this Guide for more information. The Tax field identifies the tax rate used by the company. Briefcase allows multiple tax rates, which may vary from state to state or internationally. Tax rates can be defined in the Briefcase Settings Window.

You can also specify trading terms for each company by selecting one of the options in the Terms drop down menu. By default, Briefcase will use the terms defined under the Terms section in the Briefcase Settings Window.

Address

When entering a business address, Briefcase will automatically fill out the postal address to be the same. If this is not the case – for instance, where the company uses a P.O. Box – you can manually enter the postal address in this field. Click the Flick Through icon to switch between the business address and the postal address.

Company Lines

This section allows you to record contact information such as phone numbers and email addresses. As you will be entering contact details for individuals in the Contacts section, you may want to only record a generic phone number here, for example - reception instead of a direct line.

Contacts Tab

The Contacts Tab allows you to enter details of contacts from the company.

Enter data for each contact (such as Title, Name, Surname, Job Title, Phone, Mobile, and Email) by clicking the fields under each of these column headings.

Information viewed here will also appear in the Contacts Window.

To view more information about a particular contact, click the List Contacts link in the bottom left corner. This action will take you directly to the Contacts Window.

Website Tab

The Website Tab allows you to store details of the company's website, account details and passwords for hosting and FTP etc.

Location Map Tab

The Location Map Tab shows you the location of the company through Google Maps, based on information entered in the address field.

Contacts

Contacts

This section describes how to create a detailed record of contacts so you never need to rummage through your address book again.

List View

List View displays a list of current found records. By default, List View shows a filtered list of ALL contact records. (This setting can be changed at any time in the Settings Window).

Click All to display an unsorted list of all contact records.

Sorting the Contacts List

To sort the Contacts List, click the appropriate column header. You can sort by contact type, first name, last name, Job title or company.

Filtering the Contacts List

Click the Filter menu Prospect to filter the Contacts List Only records of the type you select will be displayed.

Finding a record

The Find function makes it easy to search for contacts in a database that may contain hundreds of entries.

To find a particular contact record, click the Find button Find .

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the 'Finding Records' section on page 48 of this Guide for more information about performing complex Finds.

Printing a record

Click the Print Button Print . This will bring up the print dialogue where you can select an appropriate print layout from the pull down menu.

The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting a record

To delete the current record, press the Delete button Delete .

To view details of a record

Click in the Contact row to go to the contact record in Detail View.

Creating a new record

To create a new contact record from List View, click the New button. This action will take you to the new record in Detail View (see next section) where you can enter the contact's details.

Locking a record

To lock a record, press the Lock icon. Once locked, the header will highlight in orange to indicate the locked status.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail view allows you to populate a Contacts record or edit an existing record.

Details

To create a new contact record in Detail View, click the New button. This action will take you to a new record where you can enter the contact's details in the following fields. Enter the contact's name and Job title.

Company

To assign a company to the person, click in the Company field and select an existing company from the drop down list. This action automatically inputs the information stored for that company into the relevant fields.

Once a company has been assigned to the contact, clicking the Company link will take you directly to the appropriate company record.

See the 'Companies' section on page 8 of this Guide for more information.

Helpful Hint: If you want to enter a company that is not listed in the drop down list, you must create a record for this company first.

Correspondence

This section allows you to keep records of any contact you have had with Contacts.

Enter a description of the contact in the Correspondence field and enter a follow up action in the Next Action field. Briefcase will automatically timestamp the record at the time of entry.

Job Bags

Job Bags

Jobs are the heart of any project-based business and in this section, you'll learn how to create a Job bag that holds everything you ever need to know to get it done quickly and efficiently.

Helpful Hint: In Briefcase, a Job bag is not a single quote or Estimate, but a container to hold all information relating to a particular Job. This might include a number of quotes, Estimates, time sheets, details of Purchases, etc.

List View

List View displays a list of your current found records. By default, List View shows a list of Current Jobs. (This setting can be changed at any time in the Settings Window).

Click All to display an unsorted list of all Job records.

Sorting the Jobs List

To sort the Jobs List, click the appropriate column header. You can sort by Job number, client, date of entry, current stage, due date, and Job status.

Filtering the Job List

Click the Filter menu Current Jobs to filter the Job List. Only records of the type you select will be displayed.

Finding a Job record

The Find function makes it easy to search for a Job in a database that may contain hundreds of entries.

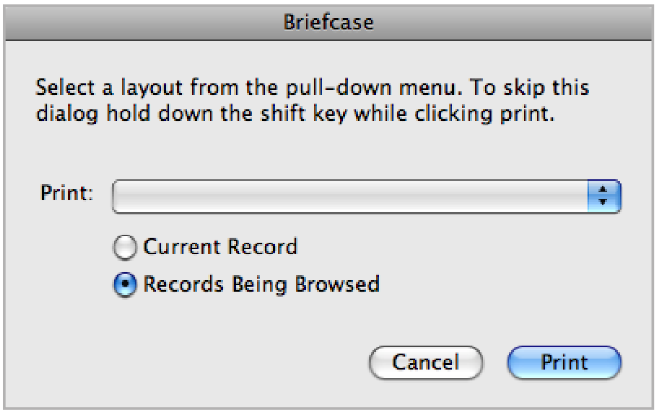
To find a particular Job record, click the Find button Find.

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the 'Finding Records' section on page 48 of this Guide for more information about performing complex Finds.

Printing a Job record

Click the Print Button Print. This will bring up the print dialogue where you can select an appropriate print layout from the pull down menu.



The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting a Job record

To delete the current record, press the Delete button Delete.

To view details of a Job record

Click in the Job row to go to the Job record in Detail View.

Creating a new Job record

To create a new Job in List View, click the New button New. Select a Client from the dialog. This action will take you to the new record in Detail View (see next section).

Locking a Job record

To lock a record, press the Lock icon. Once locked, the header will highlight in orange to indicate the locked status.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail View contains full details for each Job, including details such as Job number, status, date of entry, department and manager. It also includes information about the client, and a Job Progress section for current stages within the Job.

To create a new Job in Detail View, click the New button New . Select a Client from the dialog.

Details

A Job Number is created automatically once you enter a company name in the Client area of this window. Once created, the Job number can be changed at any time.

Details			
Job	ANZ001	Annual Report	
Status	Live	Entered	Tuesday, 29 December 2009
Dept.	Web Design	Manager	Leonardo Tahn

Enter a Job Title in the field beside the Job Number to make it easy to identify the Job (eg. Annual Report).

By default, the Status is set to Pending. Click on this field to choose an alternative option (eg. Live, Continual, On Hold, To Quote, To Invoice, With Client, With Supplier, Complete or Cancelled).

By changing the status of a Job, you can alter the availability of a Job to other users. For example, if a Job's status is marked as Complete, no users will be able to enter time information in the Time/Materials Window.

Client

When creating a new Job record, first you must assign the Job to a company. This action will automatically create a Job Number in the Job field within Details.

Client details such as contact, phone and email address will appear automatically.

Client			
Company	ANZ Bank		
Contact	Marion Finamore	Phone	9302 4345
Email	marion@anz.com		

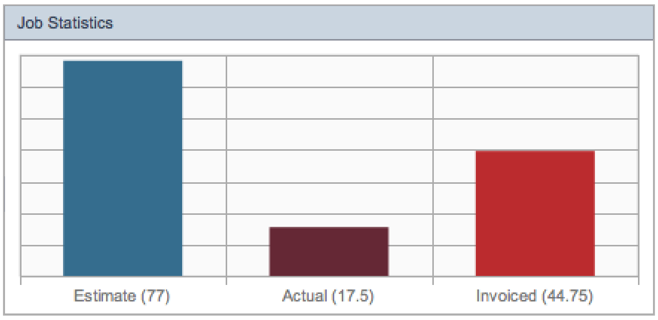
To select a different contact, click on the Contact field and select from the drop down list. That person's email and phone number will then fill in automatically. If the contact does not exist, go to the Contacts Window and add them as a new contact.

Click the Company link to go to the company record.

To send your contact an email, click the Email icon . This will automatically open a new email to that person.

Job Time

The Job Time graph shows time Estimates, actual and Invoiced. This simple chart displays the overall progress of a Job.



Job Activity

The Job Activity table automatically records creation, deletion and status modification of any related records - these are called log events and appear in grey. You can also manually add information for historical reference as well as attachments.

Scope Tab

The first section in the scope tab allows you to enter a Job brief supplied by the client, or your own summary. You can paste text in the blank space or enter it manually.

Team Members

Team members are those users who have access to the Job. For example if you wanted to give a user access to a Job so they can record time, you would add them as a team member. To save time you can add default team members to all new Jobs in Settings.

Parent Job

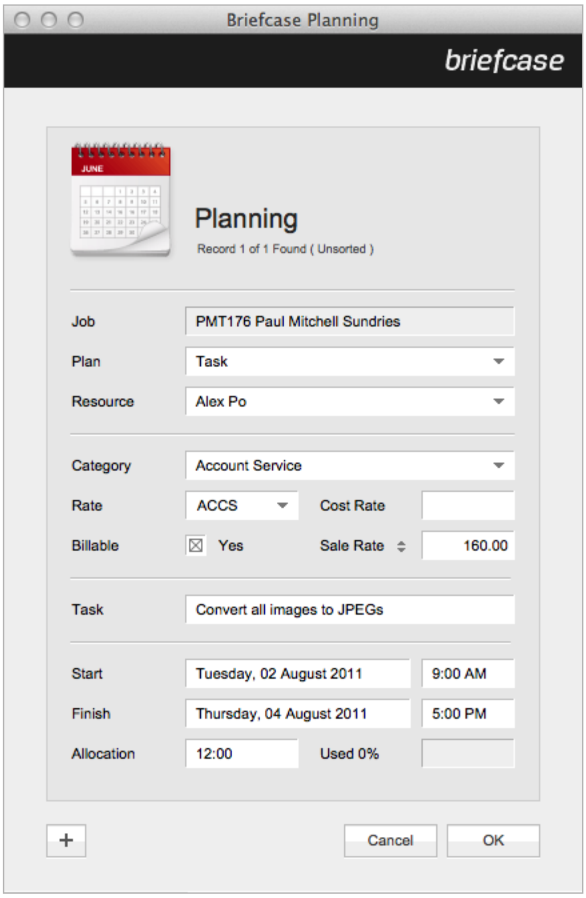
Parent Jobs can be used to manage large campaigns and retainers. Adding a parent to a Job means the parent Job can Invoice the Job along with any other child Jobs. It also provides a summary of all the Jobs that belong to the parent.

This is a great feature if you want to Invoice your client for a range of Jobs under the one Invoice (typically retainers).

Planning

The Planning section allows you to create Actions, Milestones and Tasks. Information you enter here will appear in Briefcase Attaché and the WIP report.

To add a plan to the Job click the Add icon . The Planning dialog will appear.



Planning Dialog

In the Planning Dialog select a type of Plan from the options in the drop-down list. Actions, Milestones and Tasks.

Actions and Milestones are very similar they both have a description and a due date. An example of an Action may be 'Call supplier for delivery date'. This is simply something that needs to be done by a certain date. A Milestone however is more critical to the Job, an example of a Milestone may be 'Delivery Due'.

The final option for a plan is a Task. A Task requires more information such as a charge out rate, start and end date and an allocation of time to complete the Task. You will most likely need to configure the Rates section of Briefcase to customise these options.

Assign the plan to a resource by selecting a name from the drop down list in the Resource field. Select start and due dates in the relevant fields, if applicable.

Helpful Hint: If you need to enter multiple planning records you can leave the dialog open and click the + icon in the bottom left corner of the dialog.

Gantt Charts

By maintaining the planning table with current and up to date information you can be sure to stay on top of each Job. Briefcase also helps you visualise this information in a Gantt chart. To view the timeline of a Job in Gantt format click the List Plan link at the bottom of the Planning table.

To help manage workflow you can view current Jobs in this format too. Click the Filter menu Current Jobs to see a Gantt chart for all current Jobs.

The Briefcase Gantt chart is fully interactive. You can drag items to change dates, reassign resources and update tasks. The list is fully searchable and can be sorted by using the column headers to give you a breakdown by Job, resource or due date.

Estimates Tab

The Estimates Tab contains a list of all the Estimates relating to the Job. It has important information about each Estimate such as the Estimate Number, Author, Date Entered, Description, Cost, Sale, Margin and Status. The fields on the right of the grey footer show the total amounts for the monetary columns.

IMPORTANT: Estimates can have a status independent of the actual Job. For example, you may have a live Job with four or five Estimates that have been rejected by the client together with one or more Estimates that have been approved.

To view an Estimate in detail, click in the Estimate row. This action will take you to the Estimates Window.

To create a new Estimate, click the Add icon . This action will take you to the Estimates Window again. Adding an Estimate from the Job Bag Window automatically inputs the client and Job details into the Estimates Window. Click the Back button to return to the Estimates Tab.

To delete an Estimate, click the Delete icon . You will be prompted by a dialogue box to confirm whether you wish to proceed or not.

Purchases Tab

The Purchases Tab contains a list of all Purchases relating to the Job. It has important information about each Purchase such as the Purchase Number, Supplier, Date Entered, Description, Cost and the Status.

To view a Purchase in detail, click in the Purchase row. This will take you to the Purchases Window. Click the Back button to return to the Purchases Tab.

To create a new Purchase record, click the Add icon . This will take you to the Purchases Window again. Adding a Purchase from the Job Bag Window automatically inputs the client and Job details.

To delete a Purchase, click the Delete icon . You will be prompted by a dialogue box to confirm whether you wish to proceed or not.

Invoices Tab

The Invoices Tab contains a list of all the Invoices relating to the Job. It has important information about each Invoice such as the Invoice Number, Author, Date Entered, Due Date, Notes, Cost, Sale, Margin and Status. The grey footer shows the total amounts for the monetary columns.

To view an Invoice, click in the Invoice row. This action will take you to the Invoices Window. Click the Back button to return to the Invoices Tab.

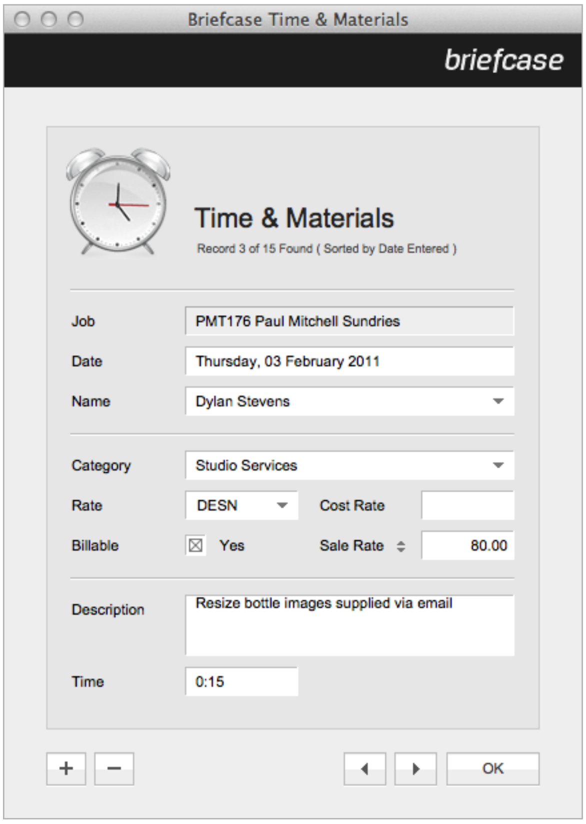
To create a new Invoice, click the Add icon . This will take you the Invoices Window. Adding an Invoice from the Job Bag automatically inputs the client and Job details.

To delete an Invoice, click the Delete icon . You will be prompted by a dialogue box to confirm whether you wish to proceed or not.

Time Tab

The Time Tab contains details of time and materials used during a Job. It includes important information such as the Rate, Name, Date Entered, Description, Quantity, and Sale Rate.

To create a new record, click the Add icon . The Time & Materials dialog will appear.



Time & Materials Dialog

In the Time & Materials Dialog select the date, the name of the person recording the time from the drop down list, the charge out rate, a brief description of the work done, and the quantity. You will most likely need to configure the Rates section of Briefcase to customise these options.

Click the List Time link in the bottom left corner to view the records in the Time & Materials Window.

Times can also be entered in the Time & Materials Window or by using Briefcase Attaché. See the Time & Materials section on page 38 of this Guide for more information.

Summary tab

The Summary Tab helps you keep track of Jobs. It displays a summary of each part of the Job, drawing upon information entered in your approved Estimates, Purchases, time and Invoices.

You can get an overview of the Estimated and actual costs and margins, as well as the amount remaining to Invoice in each part of the Job.

Estimates

Estimates

The creation of an Estimate can be a critical step in Job tracking and invoicing, helping you to give clients an idea of what they'll be up for and often forming the basis for the Invoice you eventually send. This section describes how to create Estimates from information entered here and also how to draw upon records you have entered in other key sections of Briefcase.

Helpful Hint: There may be multiple Estimates under the same Job Number, but each Estimate has a unique Estimate Number.

List View

List View displays a list of your current found Estimates. By default, List View shows a filtered list of ALL Estimate records. (This setting can be changed at any time in the Settings Window).

Click All to display an unsorted list of all Estimate records.

Sorting the Estimates List

To sort the Estimates List, click the appropriate column header. You can sort by Estimate number, client, Job number, date of entry or Estimate status.

Filtering the Estimates List

Click the Filter menu [This Year] to filter the Estimates List. Only records of the type you select will be displayed.

Finding an Estimate record

The Find function makes it easy to search for an Estimate in a database that may contain hundreds of entries.

To find a particular Estimate record, click the Find button [Find].

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the 'Finding Records' section on page 48 of this Guide for more information about performing complex Finds.

Printing an Estimate

Click the Print Button [Print]. This will bring up the print dialogue where you can select an appropriate print layout from the pull down menu.

The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting an Estimate

To delete the current Estimate, press the Delete button [Delete].

To view details of an Estimate

Click in the Estimate row to go to the Estimate in Detail View.

Cloning an Estimate

To create a clone of an Estimate, click the Clone button [Clone]. This function is useful if you wish to create an Estimate for a new client that is based on a previous Estimate. You will need to make changes to the cloned Estimate to update the new Job and client details.

Creating a new Estimate record

To create a new Estimate in List View, click the New button [New]. Select a Job from the dialog. This action will take you to the new record in Detail View (see next section).

You can also create an Estimate through the Estimates tab in the Job Bags Window, to save you time. See the 'Job Bags' section on page 18 of this Guide for more information.

Locking an Estimate record

To lock a record, press the Lock icon. Once locked, the header will highlight in orange to indicate the locked status.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail View contains full details for each Estimate, including details such as Estimate number, status, date of entry, department and author. It also includes information about the Job, client and approval status.

There are also separate tabs for information about scope, Estimate items and Purchases to be included.

To create a new Estimate in Detail View, click the New button New . Select a Job from the dialog.

Details

The Estimate Number is created automatically once a new Estimate record is opened. Once created, the Estimate number can be changed at any time.

Details			
Estimate	E5364	Cost Estimate	
Status	Pending	Entered	Wednesday, 30 December 2009
Chance %	67	Author	Alex Po

Enter the Estimate type in the field beside the Estimate Number by selecting from the drop down list. You can select from Estimate, Cost Estimate, Quote, Revised Estimate, Variation, Retainer Agreement, Non Billable or Template.

To create your own kind of Estimate, choose the Edit option and type in a new name.

By default, the Status is set to Pending. Click on this field to choose an alternative option (eg. Sent, Approved, Declined or Cancelled).

Job Bag

Select the Job the Estimate relates to from the drop down list that appears when you click in the Job field. This will open a list of all Current Jobs.

Once a Job is selected, all the Job information and client details will load into the appropriate fields.

Job Bag			
Job	ANZ001	Annual Report	
Status	Live	Entered	Tuesday, 29 December 2009
Dept.	Web Design	Manager	Leonardo Tahn

You can change the Job at any time, which is especially useful if you want to clone an Estimate for a different Job.

Client

If a Job is selected these fields are set to appear automatically. You can also change these by clicking in the appropriate field.

Client			
Company	ANZ Bank		
Contact	Marion Finamore	Phone	9302 4345
Email	marion@anz.com		

To select a different contact, click on the Contact field and select from the drop down list. That person's email and phone number will then fill in automatically. If the contact you seek does not appear, go to the Contacts Window and add them as a new contact. (This makes their details available across all of Briefcase).

To send your contact an email, click the Email icon . This will automatically open a new email to that person.

Estimate Sale

This space displays the expected approval date (useful for forecasting reports), approval date and client order number. Once an Estimate is approved the approval date is populated along with the approved amounts.

Estimate Sale			
Expected	Monday, 15 February 2010	Amount	1,200.00
Approved	Tuesday, 16 February 2010	GST	120.00
Order No.	#AMT009333	Total	1,320.00

Title/Notes

The Title/Notes space is provided for you to put a short description of the Estimate or extra notes about the Estimate. The title field helps identify multiple Estimates in a Job.

Title / Notes
Annual Report

Scope Tab

The Scope tab is where you enter the Estimate header and footer and optional specifications for the Estimate.

The default Estimate header and footer descriptions are set in the Briefcase Settings Window and can be changed at any time. See the 'Settings' section on page 44 of this Guide for further information.

Entering specifications

To enter a specification, select an option from the drop down list in the Specification field.

Enter a description for the specification in the Detail field. Repeat this process on a new row for each specification.

Specification	Detail
Print	full colour 2 sides
Stock	150gsm Mega Recycled Silk
Flat Size	A2
Finishing	folding and delivery to one location

You can also create your own specification by selecting Edit and entering your own category.

Helpful Hint: If you would like to copy the specifications from one Estimate to another or from a Purchase order to an Estimate, click the paperclip icon once. Then go to the record you want to paste into and click the paperclip icon again.

Specifications can be included in your printed Estimates by selecting the appropriate template in the print dialogue.

Estimate Items Tab

The Estimate Items Tab is where you build your Estimate line by line.

Adding an Estimate item

To add an item, click the Add icon . Or click in the first empty row in the Category column.

Categories are used to break down the items you charge for. For example you might have a category called Account Service where you store all your rates for things like meetings, administration etc.

Selecting a category will load the relevant rates in the rate column, choose an Item from the drop down list. This will load a default description and rates, based on information that has already been entered in the Rates Window.

Helpful Hint: You can easily change the default descriptions and rates after selecting an item by simply keying over them. You can even change the part title.

More on categories

You'll notice that when you print your Estimates the categories form the titles for which the items sit beneath. Items which share the same part are grouped together to make your Estimate easier to read.

With Briefcase you can remove this feature by editing the Estimate setup in layout mode.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Part	Item	Description	Opt.	Quantity	Cost Rate	Cost	MU%	Sale Rate	Sale	Margin	Tax
Account Service	ACCS	Client meetings, production planning and co-	☐	2		0.00		150.00	300.00	300.00	GST
Creative	DESN	2010 Calendar concepts and layout. Our cost	☐	16		0.00		150.00	2,400.00	2,400.00	GST
Creative	DESN	Finished artwork to meet printers specifications and	☐	4		0.00		150.00	600.00	600.00	GST
Printing	PRINT	Printing	☒	2,000		1,309.00	30%		1,701.70	392.70	GST
Tier Standard						1,309.00			5,001.70	3,692.70	GM 73.83%

Including multiple cost options

In some cases, you may want to include multiple cost options for different quantities of an item in your Estimate in order to give your client a choice.

To do this, click in the Option (Opt.) column for each relevant Estimate item. Select from the Opt. drop down list to assign each option a number. To preview the effect of including multiple cost options select the Estimate Options print layout from the drop down menu in the print dialogue.

Adding quantities

In the Quantity field, enter a number for hours / units or any other measure. The rate will be multiplied by the quantity you enter here to give you a subtotal in the Sale field. If you would like the quantity visible in your printed Estimate, check the check box.

Applying a mark-up

To apply a mark-up to a cost, enter a value in the MU% field.

Hiding items in an Estimate

In some cases, you may need to charge for items that you don't necessarily want to itemise in your Estimate. For example, you may not wish to have the cost of laser prints itemised, but included within the overall design cost instead.

To do this, click the view icon next to the item you wish to hide. The subtotal for this item is then added to the item directly above when printed.

Excluding items in an Estimate

Click the view icon twice, so that a red cross appears. The item and its sale amount will not appear in the print layout. The sale amount for the item will also be excluded in the total.

Changing the order of items

You can change the order of the items in the list by clicking the Sort icon .

Deleting an item

To delete an item, press the Delete icon .

Approving an item

The Status icon is used to identify whether an item has been approved or not. A green tick signals an approved item; a grey tick signals a pending item.

Approving an item will automatically input the approval date and amount into the fields in the Estimate Sale section. It will also change the Estimate Status in the Status field from Pending to Approved.

If all items in an Estimate have been approved, hold down the Shift key and click on a Status icon . This will approve all items simultaneously.

Items also become available for invoicing once approved. See the 'Invoices' section on page 33 of this Guide for more information.

From Purchases Tab

The From Purchases Tab allows you to select Purchases to include in the Estimate Items Tab.

The From Purchases Tab lists all Purchases relating to the current Job. For more information about Purchases see the 'Purchases' section on page 28 of this guide.

Adding a Purchase to the Estimate items

Click the Add icon for each Purchase item you want to add to the Estimate items.

Return to the Estimate Items tab to see the Purchases you have added; these will appear in blue.

Purchases

Purchases

Briefcase Purchases help you put together Estimates where third party costs are involved. They also help document your requests and orders to your suppliers.

A Purchase is not necessarily a Purchase order, it can be a request for a quote - that may if approved become a Purchase order.

> **Helpful Hint:** There may be multiple Purchases under the same Job Number, but each Estimate has a unique Purchase Number.

List View

List View displays a list of your current found Purchases. By default, List View shows a list of ALL Purchase records. (This setting can be changed at any time in the Settings Window).

Click All to display an unsorted list of all Estimate records.

Sorting the Purchases List

To sort the Purchases List, click the appropriate column header. You can sort by Purchase number, supplier, Job number, date of entry or Purchase status.

Filtering the Purchases List

Click the Filter menu [This Year] to filter the Purchases List. Only records of the type you select will be displayed.

Finding a Purchase record

The Find function makes it easy to search for a Purchase in a database that may contain hundreds of entries.

To find a particular Purchase record, click the Find button [Find] .

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

Printing a Purchase

Click the Print Button [Print] . This will bring up the print dialogue where you can select an appropriate print layout from the pull down menu.

The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting a Purchase

To delete the current Purchase, press the Delete button [Delete] .

To view details of a Purchase

Click in the Purchase row, to go to the Purchase in Detail View.

Cloning a Purchase

To create a clone of a Purchase, click the Clone button [Clone] . This function is useful if you wish to create a Purchase for a new client that is based on a previous Purchase. You will need to make changes to the cloned Purchase to update the new Job and client details.

Creating a new Purchase record

To create a new Purchase in List View, click the New button [New] . Select a Job from the dialog. This action will take you to the new record in Detail View (see next section).

You can also create a Purchase through the Purchases tab in the Job Bags Window, to save you time. See the Job Bags section on page 8 of this Guide for more information.

Locking a Purchase record

To lock a record, press the Lock icon . Once locked, a record will turn grey and cannot be modified by other users.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail View contains full details for each Purchase, including details such as Purchase number, status, date of entry, department and author. It also includes information about the Job, supplier and approval status.

There are also separate tabs for information about scope, Purchase items and delivery.

To create a new Purchase in Detail View, click the New button New . Select a Job from the dialog.

Details

The Purchase Number is created automatically once a new Purchase record is opened. Once created, the Purchase number can be changed at any time.

Details			
Purchase	P5212	Purchase	
Status	On Request	Entered	Tuesday, 29 December 2009
Author	Nicole Solier		

Enter the Purchase order type in the field beside the Purchase Number by selecting from the drop down list. You can select from Purchase Order, Work Order or Template.

To create your own kind of Purchase order, choose the Edit option and type in a new name.

By default, the Status is set to Pending. Click on this field to choose an alternative option (eg. On Request, Order, Inv. Entered, Exported or Cancelled).

Job Bag

Select the Job the Purchase relates to from the drop down list that appears when you click in the Job field. This will open a list of all Current Jobs.

Once a Job is selected, all the Job information and client details will load into the appropriate fields.

Job Bag			
Job	ANZ002	ANZ Advisory Document	
Status	Continual	Entered	Wednesday, 20 January 2010
Dept.	Studio	Manager	Nicole Solier

You can change the Job at any time, which is especially useful if you want to clone a Purchase for a different Job.

Supplier

To select a supplier, click on the Company field and select from the drop down list. The email address and phone number for the company's contact person will fill in automatically.

Supplier			
Company	Conic Digital Printing		
Contact	Jessica Napoli	Phone	8264 5024
Email	jessn@conic.com		

If the contact you seek does not appear, go to the Contacts Window and add them as a new contact. (This makes their details available across all of Briefcase).

To send your contact an email click the Email icon . This will automatically open a new email to that person.

Purchase Sale

This space displays the approval date, date received and supplier Invoice number. Once a Purchase is approved, the approval date is populated along with the approved amounts.

Purchase Cost			
Approved	Tuesday, 16 February 2010	Amount	1,387.00
Received	Tuesday, 09 March 2010	GST	138.70
Invoice No.		Total	1,525.70

Title/Notes Space

The Title/Notes space is provided for you to put a short description of the Purchase or extra notes about the Purchase. The title field helps identify multiple Purchases in a Job.

Title / Notes
Document Inserts x 5 kinds

Scope Tab

The Scope tab is where you enter specifications for the Purchase. This information can also be used to obtain quotes from suppliers.

A default request appears in the Scope/Instructions field. The default is set in the Briefcase Settings Window and can be changed at any time. See the Settings section on page 44 of this Guide for further information.

Entering specifications

To enter a specification, select an option from the drop down list in the Specification field. You can also create your own specification by selecting Edit and entering your own category.

Enter a description for the specification in the Detail field. Repeat this process on a new row for each specification.

Specification	Detail
Print	2 PMS Inside and Outside
Kinds	1
Finished Size	New forme to be supplied (please base on standard size)
Stock	300gsm Artboard
Finishing	Matt Laminate Both Sides

You can also create your own specification by selecting Edit and entering your own category.

Helpful Hint: If you would like to copy the specifications from a Purchase to an Estimate, click the paperclip icon once. Then go to the record you want to paste into and click the paperclip icon again.

Once the specifications have been entered, you can put the Purchase details into an email by clicking the Email icon in the Specifications section.

Purchase Items Tab

The Purchase Items Tab is used to add supplier quotes to a Purchase. By entering a quote on each line, you can later select the approved items in the same way Estimate items are approved.

You may also find it helpful to use a supplier quote in more than one Estimate. This can be achieved by adding the Purchase costs via the From Purchase Items tab in the Estimates Window.

Adding a Purchase item

To add an item, click the Add icon . Or click in the first empty row in the Category column.

Categories are used to break down the items you charge for. For example you might have a category called Printing where you store all your rates for things like digital, offset etc.

Selecting a category will load the relevant rates in the rate column. Choose an Item from the drop down list. This will load a default description and markups, based on information that has already been entered in the Rates Window.

Helpful Hint: You can easily change the default descriptions and rates after selecting an item by simply keying over them. You can even change the part title.

Note: The primary fields in Purchase Items are Category,
Rate and Cost fields. It's recommended that a description, supplier quote and quantity are also included on each line.

Part	Item	Description	Suppliers Quote	Opt.	Quantity	Cost Rate	Cost	MU%	Sale Rate	Sale	Margin	Tax
Printing	PRINT	printing 2000	136,786	a)	☒ 2,000		5,866.00	30%		7,625.80	1,759.80	GST
Printing	PRINT	printing 3000	136,786	b)	☒ 3,000		7,570.00	30%		9,841.00	2,271.00	GST
Printing	PRINT	printing 4000	136,786	c)	☒ 4,000		6,726.00	30%		8,743.80	2,017.80	GST
Tier Standard							20,162.00			26,210.60	6,048.60	GM 23.08%

Including multiple cost options

In some cases, you may receive quotes from your suppliers with multiple options, such as varying quantities. Use the Opt. field to label each option.

Enter each option in Purchase Items, for use in Estimates or to simply keep a record of each option.

Adding quantities

Enter a number in the quantity field. If your quote is based on a unit cost enter the cost rate, the rate will be multiplied by the quantity to give you a subtotal in the Cost field.

Applying a mark-up

To apply a mark-up to a cost, enter a value in the MU% field.

Hiding items in a Purchase

In some cases, you may want to summarise your Purchase order and not include the cost of each component.

To do this, click the view icon next to the item you wish to hide. The subtotal for this item is then added to the item directly above when printed.

Excluding items in a Purchase

Click the view icon twice, so that a red cross appears. The item and its cost amount will not appear in the print layout. The cost amount for the item will also be excluded in the total.

Changing the order of items

You can change the order of the items in the list by clicking the Sort icon .

Deleting an item

To delete an item, press the Delete icon .

Approving an item

The Status icon is used to identify whether an item has been approved or not. A green tick signals an approved item; a grey tick signals a pending item.

Approving an item will automatically input the approval date and amount into the fields in the Purchase Cost section. It will also change the Purchase Status in the Status field from On Request to On Order.

If all items in a Purchase have been approved, hold down the Shift key and click on a Status icon . This will approve all items simultaneously.

Items also become available for invoicing once approved. See the 'Invoices' section on page 33 of this Guide for more information.

Delivery Tab

The Delivery Tab is where you enter details for the delivery of a Purchase. You can have as many delivery locations as required.

Click on the Company field and select a company from the drop down list. The address will be filled in automatically from details already entered in the Companies Window.

There are also fields for quantity, any special delivery instructions, contact name and due date.

Invoices

Invoices

This section will show you how Briefcase can help you to create an Invoice quickly and easily. Invoicing can be done directly from approved items that have been entered through Estimates, Purchases and time entries, as well as manually.

> **Helpful Hint:** There may be multiple Invoices under the same Job Number, but each Invoice has a unique Invoice number.
>
> This means you can part or progress bill your Jobs and still be able to easily identify each Invoice.

List View

List View displays a list of your current found records. By default, List View shows a list of ALL Invoice records. (This setting can be changed at any time in the Settings Window).

Click All to display an unsorted list of all Invoice records.

Sorting the Invoices List

To sort the Invoices List, click the appropriate column header. You can sort by Invoice number, client, Job number, date of entry, month, due date or status.

Filtering the Invoices List

Click the Filter button menu [This Year] to filter the Invoices List.

Only records of the type you select will be displayed.

Finding an Invoice record

The Find function makes it easy to search for an Invoice in a database that may contain hundreds of entries.

To find a particular Invoice record, click the Find button [Find].

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the 'Finding Records' section on page 48 of this Guide for more information about performing complex Finds.

Printing an Invoice

Click the Print Button [Print]. This will bring up the print dialogue where you can select an appropriate print layout from the pull down menu.

The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting an Invoice

To delete the current Invoice, press the Delete button [Delete].

To view details of an Invoice

Click in the Invoice row to go to the Invoice in Detail View.

Creating a new Invoice record

To create a new Invoice in List View, click the New button [New]. Select a Job from the dialog. This action will take you to the new record in Detail View (see next section).

You can also create an Invoice through the Invoices Tab in the Job Bags Window, to save you time. See the 'Job Bags' section on page 18 of this Guide for more information.

Locking an Invoice record

To lock a record, press the Lock icon. Once locked, the header will highlight in orange to indicate the locked status.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail View contains full details for each Invoice, including details such as the Invoice number, status, date of entry and author. It also includes information about the Job, client and Invoice sale.

There are also separate tabs for information about Invoice Items, From Estimates, From Purchases and From Time.

To create a new Invoice in Detail View, click the New button New . Select a Job from the dialog.

Details

The Invoice Number is created automatically once a new Invoice record is opened. Once created, the Invoice number can be changed at any time.

Details			
Invoice	IN5430	Progressive Invoice	
Status	Exported	Entered	Friday, 05 February 2010
Author	Alex Po		

Enter the Invoice type in the field beside the Invoice Number field by selecting from the drop down list. You can select from Tax Invoice, Proforma Invoice, Progressive Invoice, Final Invoice or Credit Adjustment.

To create your own Invoice type, choose the Edit option and type in a new name.

By default, the Status is set to Pending. Click on this field to choose an alternative option (eg. Open, Closed, Inv. Entered, Exported or Cancelled).

Job Bag

Select the Job the Invoice relates to from the drop down list that appears when you click in the Job field. This will open a list of all Current Jobs.

Once a Job is selected, all the Job information and client details will load into the appropriate fields of the Job Bag and Client fields.

Job Bag			
Job	ANZ001	Annual Report	
Status	Live	Entered	Tuesday, 29 December 2009
Dept.	Web Design	Manager	Leonardo Tahn

By default, the Status is set to Open. Click on this field to choose an alternative option (eg. Closed, Exported). You can change the Job at any time, which is especially useful if you want to clone an Invoice for a different Job.

Client

Once the Job number has been selected, the email address and phone number for the company's contact person will fill in automatically. Click in the Contact field to choose another contact from that company.

Client			
Company	ANZ Bank		
Contact	Marion Finamore	Phone	9302 4345
Email	marion@anz.com		

If the contact you seek does not appear, go to the Contacts Window and add them as a new contact.

To send your contact an email, click the Email icon . This will automatically open a new email to that person.

Invoice Sale

This space includes trading terms, Invoice due date, your clients order number (if supplied) and the Invoice amount.

Invoice Sale			
Terms	30 days from invoice date	Amount	852.00
Due	Friday, 02 April 2010	GST	85.20
Order No.		Total	937.20

The trading terms defaults are referenced from the clients company record, the default options can be changed in the Briefcase Settings Window.

The Invoice Due Date will automatically adjust to suit the term you select.

Invoice Items Tab

The Invoice Items Tab is where you specify all the items that you wish to include in your Invoice.

Usually the Invoice should match the Estimate, and you will only need to add Invoice items from the From Estimates Tab. This makes creating an Invoice directly from the Estimate items very simple.

However, you can also add an Invoice item that was NOT Estimated.

Adding an Invoice item

To add an item, click the Add icon . Or click in the first empty row in the Category column.

Categories are used to break down the categories of items you charge for. For example you might have a category called Account Service where you store all your rates for things like meetings, administration etc.

Selecting a category will load the relevant rates in the rate column, choose an Item from the drop down list. This will load a default description and rates, based on information that has already been entered in the Rates Window.

Helpful Hint: You can easily change the default descriptions and rates after selecting an item by simply keying over them. You can even change the part title.

More on categories

You'll notice that when you print your Invoices, the categories form the titles for which the items sit beneath. Items which share the same part are grouped together to make your Invoice easier to read.

With Briefcase you can remove this feature by editing the Invoice setup in layout mode.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Adding quantities

In the Quantity field, enter a number for hours / units or any other measure. The rate will be multiplied by the quantity you enter here to give you a subtotal in the Sale field. If you would like the quantity visible in your printed Invoice, check the check box.

Applying a mark-up

To apply a mark-up to a cost, enter a value in the MU% field.

Hiding items in an Estimate

In some cases, you may need to Invoice items that you don't necessarily want to itemise. For example, you may not wish to have the cost of laser prints itemised, but included within the overall design cost instead.

To do this, click the view icon next to the item you wish to hide. The subtotal for this item is then added to the item directly above when printed.

Excluding items in an Invoice

Click the view icon twice, so that a red cross appears. The item and its sale amount will not appear in the print layout. The sale amount for the item will also be excluded in the total.

Changing the order of items

You can change the order of the items in the list by clicking the Sort icon .

Deleting an item

To delete an item, press the Delete icon .

Part	Item	Description	Quantity	Cost Rate	Cost	MU%	Sale Rate	Sale	Margin	Tax
Creative	DESN	Development of new catalogue section on website.	4		0.00		150.00	600.00	600.00	GST
Specialised Services	SCRP	Develop Flash catalogue using FlippingBook from existing	4.2		0.00		140.00	588.00	588.00	GST
Creative	DESN	Layout changes to both sets of artwork. Create glow	22.5		0.00		150.00	3,375.00	3,375.00	GST
Tier Standard					0.00			4,563.00	4,563.00	GM 100.00%

From Estimates Tab

This section provides a list of all the approved Estimate items for the Job.

To add an Estimate item to the Invoice Items tab, click on the Add icon ➕.

Once added the item will turn grey, click the Invoice Items tab to see the newly added line.

If you have would like to add all items in the list hold down the shift key while clicking the Add icon.

You can also add a percentage of each item by holding down the option key. This is useful if you want to Invoice a percentage of the original item.

Holding down both the shift and option key while clicking the Add icon will allow you to Invoice a percentage of all the items in the list.

From Purchases Tab

This section provides a list of all the Purchase items for the Job.

To add a Purchase item to the Invoice Items tab, click on the Add icon ➕.

Once added the item will turn grey, click the Invoice Items tab to see the newly added line.

If you would like to add all items in the list hold down the shift key while clicking the Add icon.

You can also add a percentage of each item by holding down the option key. This is useful if you want to Invoice a percentage of the original item.

Holding down both the shift and option key while clicking the Add icon will allow you to Invoice a percentage of all the items in the list.

From Time Tab

This section provides a list of all the time/materials entries recorded for the Job.

To add a time item to the Invoice Items tab, click on the Add icon ➕.

Once added the item will turn grey, click the Invoice Items tab to see the newly added line.

If you have would like to add all items in the list hold down the shift key while clicking the Add icon.

You can also add a percentage of each item by holding down the option key. This is useful if you want to Invoice a percentage of the original item.

Holding down both the shift and option key while clicking the Add icon will allow you to Invoice a percentage of all the items in the list.

The From Time tab provides an additional feature where you can select a date range to filter the items in the list.

This is especially useful when you want to Invoice time entered for a given range, as you might do with client where retainer agreements are in place.

IMPORTANT: If a date appears in red this indicates that the list is truncated and you need to expand the range to view all entries.

Parent Jobs

Parent Jobs can be used to manage large campaigns and retainers. Invoices created by parent Jobs allow you to Invoice your client for a range of Jobs under the one Invoice (typically retainers).

When you generate an Invoice for a parent Job you'll notice each tab has additional fields. These fields allow you to select line items from other Jobs linked to the parent. You can also specify a date to limit the line items to a range.

Time & Materials

Time & Materials

In this section you'll learn how to create a time entry, add time to assigned tasks from a Job, and even keep track of the amount of time spent on a Job. This section can also be used to record in-house material costs incurred during a Job, such as supplies or expenses.

Briefcase gives you five ways to record time. You can choose the method that suits you best.

Enter time:

1. Directly into a Job using the Time tab. See the section titled Jobs.
2. In the Time & Materials Window (see below).
3. Using Briefcase Attaché Planned work.
4. Using Briefcase Attaché Jobs list.
5. Using Briefcase Attaché My Time.

List View

List View displays a list of your current found time entries. By default, List View shows a filtered list of ALL time entries. (This setting can be changed at any time in the Settings Window).

Click All to display an unsorted list of all time records.

Sorting the Time List

To sort the Time List, click the appropriate column header. You can sort by item, name, Job number or date entered.

Filtering the Time List

Click the Filter menu This Year to filter the Time List. Only records of the type you select will be displayed.

Finding a time record

The Find function makes it easy to search for a time entry in a database that may contain hundreds of entries.

To find a particular time record, click the Find button Find.

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the 'Finding Records' section on page 48 of this Guide for information about performing complex finds.

Printing a time entry

Click the Print Button Print. This will bring up the print dialogue where you can select an appropriate print report from the pull down menu.

The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting a time entry

To delete the current time record, press the Delete button Delete.

To view details of a time entry

Click in the time row to go to the Time entry in Detail View. The left side of the window contains the details for the time entry.

Creating a new time entry

To create a new time record in List View, click the New button New. Select a Job from the dialog. This action will take you to the new record in Detail View (see next section).

Locking a time record

To lock a record, press the Lock icon. Once locked, the header will highlight in orange to indicate the locked status.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail View contains full details for each time entry, such as the name, date, Job, part, item, quantity, start and end times and space for a detailed description of the time spent.

To create a new time record in Detail View, click the New button New. Select a Job from the dialog.

The new record will include the user name and date.

Select a Category and a Rate from the drop-down lists. Enter the units in either the Time or the Quantity field (this will adjust to suit the Rate you have chosen.

Enter a description of the time spent.

Briefcase Attaché

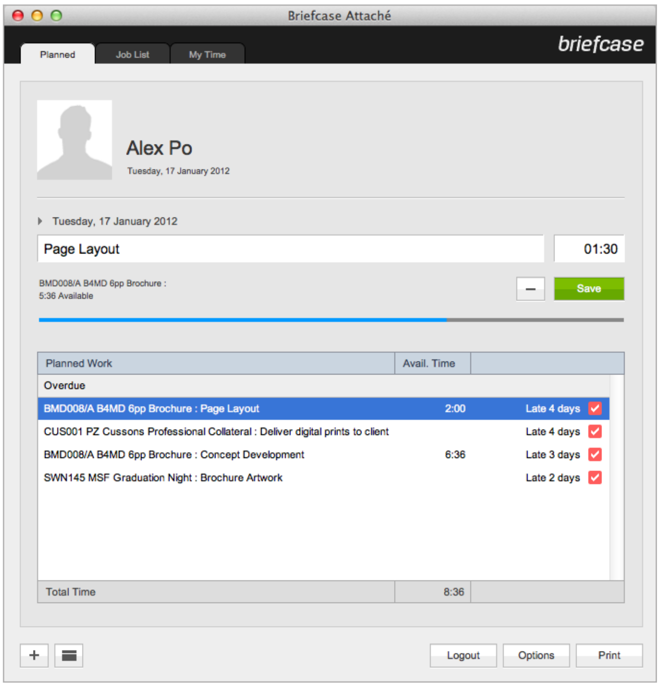
Briefcase Attaché is perhaps the easiest way for your team to record time. Attaché allows team members to see what tasks they have been assigned, which Jobs they are assigned to and their time sheet records.

To record time simply launch Attaché and login using your account login.

Attaché uses three views which you can navigate using the tabs along the top. These views are Planned, Jobs List and My Time.

Planned Tab

The Planned tab displays planning assignments that have been allocated to the user. Here you can see which tasks you need to complete, how much time is available and when the task is due.



To record time against a Task simply click the Task in the table to select. You can record time by clicking the Start button or by entering time directly into the Time field beside the task description (above the start button).

The Time field accepts a variety of user inputs. You can enter your time in decimal format or a time range. For example, 1.5 equals 1:30 and 11am-1pm equals 2:00 respectively.

The Task description will be the Time entry description by default, you can change this before clicking Save if you want to add detail to the entry.

Click Save to commit the time to the Task/Job.

Once a Task is complete click the Status icon ✅ to mark the Task as complete. This will remove the Task from the list.

Helpful Hint: You can add your own Tasks by clicking the + icon in the bottom left corner of the Attaché Window. To edit an existing Task click the dialog icon.

Jobs List Tab

The Jobs List tab displays a list of all Current Jobs that the user is a Team Member of. This method of time entry is ideal if the user has not been allocated a task but would like to record time against a Job.

To record time against a Job simply click the Job in the table to select. Unlike the Planned tab the user must enter a description. Time is then recorded using the same way as the Planned tab.

Helpful Hint: You can add a Job by clicking the + icon in the bottom left corner of the Attaché Window. This is a great way to allow users to create Jobs without giving them access to the main Briefcase system.

My Time Tab

The My Time tab displays a list of recent time and material entries. In addition to providing the user with a daily summary of time, the user can also record time by clicking the + icon in the bottom left corner of the My Time Window. This method of time entry gives the user more control and options when recording time or materials.

Helpful Hint: Each tab allows the user to print a variety of reports from planning, Jobs and time - click the Print button to choose a template.

Rates

Rates

Rates apply to just about every area of activity – from the initial quote to the final Invoice and just about every stage in between. This section describes how to create rates for different activities.

Helpful Hint: Details of the Rates you charge clients are entered in the Rates Window. Once a record for a Rate has been created, it will become available throughout the Briefcase system.

List View

List View displays a list of your current found rate items. By default, List View shows a list of ALL rate times. (This setting can be changed at any time in the Settings Window).

Click All to return to an unsorted list of all rate records.

Sorting the Rates List

To sort the Rates List, click the appropriate column header. You can sort by item, part or kind.

Filtering the Rates List

Click the Filter button menu This Year to filter the Rates List. Only records of the type you specified will be displayed.

Finding a rate item

The Find function makes it easy to search for a rate item in a database that may contain hundreds of entries.

To find a particular rate item, click the Find button Find.

Key a search term into a blank field and press Enter. A list of matching records will be displayed.

See the 'Finding Records' section on page 48 of this Guide for information about performing complex finds.

Printing a rate card

Click the Print Button Print. This will bring up the print dialogue where you can select an appropriate print report from the pull down menu.

The Print function brings up a separate preview window with the chosen layout displayed. You can select either to print, or to save the information in Excel or PDF format to your computer.

See the 'Creating/Editing Layouts' section on page 59 of this Guide for more information about editing or creating your own layouts.

Deleting a rate item

To delete the current rate item, press the Delete button Delete.

To view details of a rate item

Click in the rate item row to go to the rate item in Detail View.

Creating a new rate item

To create a new rate item in List View, click the New button New. This action will take you to the new record in Detail View (see next section) where you can enter the rate details.

Locking a rate record

To lock a record, press the Lock icon. Once locked, the header will highlight in orange to indicate the locked status.

Note: depending on your access privileges you may not have the option to use the Lock function.

Detail View

Detail View contains full details for a rate item, including the rate code, accounting codes, usage, supplier, rate tiers, and a rate description.

Defining a rate

To create a new rate, click the New button New.

Details

Enter a rate name in the Item field and a code for the rate in the Code field. This is usually an abbreviation of what the rate is for; eg. ACCS for Account Service or EPSN for Epson Proof.

Select a Category which the rate belongs to or enter a new one. Categories help you group Rates together.

In the options check Billable if the rate is billable and the Hourly checkbox if the rate is based on an hourly fee. It is important to make sure these options are set correctly, Briefcase reports and tracks time based on these settings.

Rate			
Rate Name	Meetings	Code	MEET
Category	Account Service	Sales	4-1000
Options	☐ Billable ☒ Hourly	Expenses	6-1000

You can make the rates correspond with the Sales/Expenses codes used in your accounting package by entering these in the Sales and Expenses fields.

Rate Tiers

The Cost field describes the unit cost of an item or service you may buy externally. For example, if your standard cost for an A3 colour laser copy is $1, enter this in the Cost field.

Each item for which you charge can have multiple rates – for example, you may charge some clients Standard Rates for design, while others are charged Discount or Contract Rates. These are known an Rate Tiers. The Tier names can be modified by simply typing a new name in place of the existing ones.

Enter the amount for the Rate in the Rate field. (This will be the rate you charge for an item such as design work or copywriting).

Tier	Cost	Standard	Discount	Contract
Rate		160.00	120.00	110.00
Markup				
Usage	☒ Estimates	☐ Purchases	☒ Invoices	☒ Time

Use the Markup field instead if you have no actual rate for the item but do apply a percentage mark-up (eg. if you apply a mark-up to a cost for an outside service, such as printing).

Usage

Check the boxes to choose where the rate may be applied. For example, a rate for Account Service is likely to appear in Estimates, Invoices and Time, but not in Purchases.

Default Description

In the Default Description field enter the usual description of the rate. When you are creating Estimates and Invoices, this description is what will appear when a Rate Item is selected. This saves you time re-entering commonly used descriptions.

Task Description

The Task description is used if the Rate is chosen in the Time or Planning dialog. This field can be left blank if you prefer to have user manually enter a description for time and tasks.

Helpful Hint: To assign a Rate Tier to a company, use the Tier field in the company's record. See the 'Companies' section on page 12 of this Guide for further information.

Settings

Settings

This section allows you to customise Briefcase to suit the way your business operates. From Job numbering to tax rates, footnotes to filter menus, Briefcase saves you time by applying the defaults you have set. In this section you will also setup user accounts, access privileges and choose export scripts to match your accounting package.

Helpful Hint: You must be logged in with administrator privileges to access the settings section. The account created during setup is the default administrator account.

License Registration

The Settings Window contains the license registration details for your company. This includes important information such as the Briefcase Version your company is using, the Verification Date, and the number of licensed users. This number will be the maximum number of user accounts you can create.

License Registration				
Company	June Creative Agency			
Software	Briefcase Trial v3.04	Users	1	+
Verification	Thursday, 25 March 2010			

Adding new users

To add a new user license click the Add icon + . You will be prompted to enter a Passcode to verify the number of new licenses. You will need to call Briefcase Sales to obtain a passcode.

Note: You must Purchase additional licenses from Briefcase before you can obtain a passcode.

IMPORTANT: The Verification Date is the date your software will need to be verified; you will need to call Briefcase Sales when you are prompted to verify your Briefcase license.

If you do not verify your license you will have limited access to Briefcase, and a reoccurring pop-up will remind you to obtain a passcode.

Address

Your company's address details will load, based on the information entered during initial setup.

Company logo

Right click to insert a picture in the space provided for your company logo.

Users

In this tab you can view each Briefcase user account and the privilege set that has been assigned to a particular user.

Initial user account

During installation and setup of Briefcase you will be prompted to setup an initial user account. This will be an administrator account with full access privileges.

Creating a user account

To create a new user account click the Add icon + . In the pop-up dialogue specify your account details: First Name, Last Name, Account Name, Password, Confirm Password. Select a privilege set from the drop down list (eg. Administrator). The privilege sets that appear here have been defined in the Privileges tab (see Privileges below).

Creating a new user account will also create a new record for that user in the Contacts Window.

Note: the number of user accounts you can create will depend on how many licenses you have.

Modifying a user account

To modify a user account, such as changing the account name or password, or to assign a different privilege set, click the modify icon .

Modifying a user account requires you to re-establish the user password. You can at this point change the original password if desired.

Deleting a user account

To delete a user account click the Delete icon − .

Privileges

Sometimes you may want to restrict access to certain sections of Briefcase. You may want to lock records so they are uneditable or even hide sections so they are not viewable to some users.

In this tab you can view the different privilege sets. A privilege set is designed to give a user a combination of access levels to a function or a section of Briefcase.

There are three default privilege sets already set up in Briefcase: Administrator, Account Manager and Studio. Administrator allows complete access, while Account Manager and Studio have some restrictions.

To create a new privilege set click the Add icon . Scroll down the page to view the privilege set.

For each section (eg. Job Bags) check the boxes to include the privileges you wish to make available to a user.

Check the View box to enable a user to see the section.

Check the Edit box to enable a user to modify records in the section or check Private to only allow editing if the user is the author/creator of the record.

Check the Delete box to enable a user to delete records in the section.

Check the Lock box to enable a user to lock or unlock records in the section.

Check the Print box to enable a user to Print reports in the section.

Check the Export box to enable a user to export records out of Briefcase.

To delete a privilege set click the Delete icon .

Privilege Set	Privileges						
Account Manager							
Job Bags	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☐ Export
Estimates	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☐ Export
Purchases	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☒ Export
Invoices	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☒ Export
Time	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☐ Export
Companies	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☐ Export
People	☒ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☒ Print	☐ Export
Rates	☐ View	☐ Edit	☐ Private	☐ Delete	☐ Lock	☐ Print	☐ Export
Reports	☒ View						

Setup

Numbering

In this section you can specify the way your Jobs are numbered: By Company or By Job.

To number your Jobs incrementally by client (eg. BRI001, BRI002, BRI003) in the Number By field select Company. In the Defined On-field select Company Select. In the Job Bag field enter the starting Job number that will be used (eg. 001)

To number your Jobs incrementally by Job (eg. ABC001, DFT002, HJK003) in the Number By field select Job. In the Defined On field select Company Select. In the Job Bag field enter the starting Job number that will be used (eg. 001)

If you are using prefixes make sure you enter a prefix for each company. See the 'Companies' section on page 8 of this Guide.

Numbering				
Number By	Company		Estimate	E5379
Defined On	Company Select		Purchase	P5219
Job Bag	001		Invoice	IN5452

You can also specify numbering for your Estimates, Purchases and Invoices. Enter the starting number for each of these in the respective fields.

Taxes

In this section you can specify tax rates Click in an empty row and enter information in the relevant fields.

Terms

In this section you can specify Invoice payment terms. Click in an empty row and enter information in the relevant fields.

Payment Terms	From End of Month	From Invoice Date
30 days from invoice date		30
14 days from invoice date		14
30 days from end of month	30	

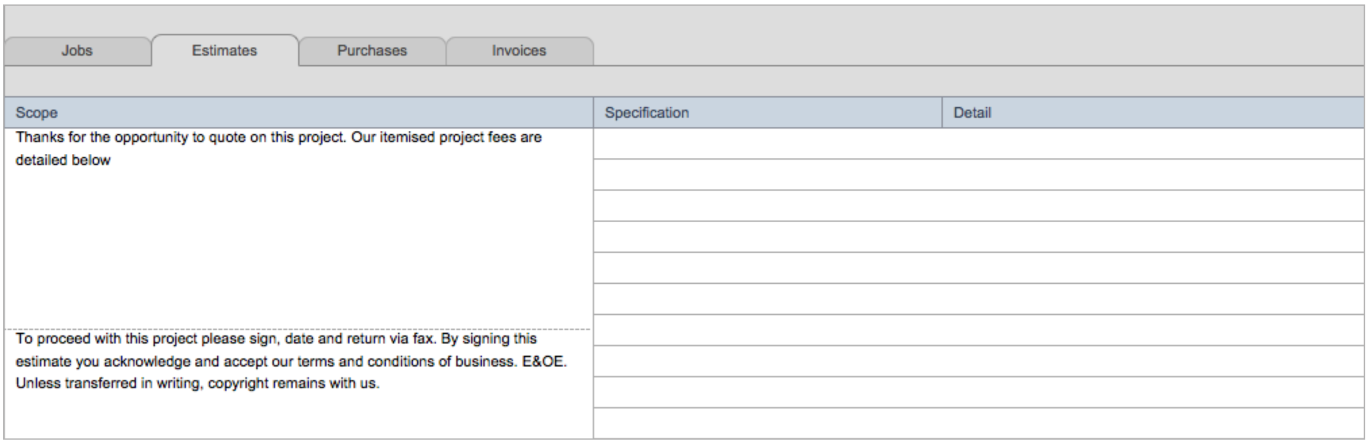
Accounts

In this section you can specify accounting codes, such as sales and expense codes that are used in your accounting package. These codes can be applied to your rates and will be useful when exporting data. Click in an empty row and enter information in the relevant fields.

Presets

In this section you can specify default items to appear in your print layouts. Click in the spaces provided in each tab to enter default descriptions that will appear in the header and footer of your Estimates, Purchases and Invoices.

You can also create the default list of options that will appear in your specifications table in Estimates and Purchases, and the default list of stages that will appear in the Job Progress section in Job Bags.



Menus

In this section you can specify the default filter menus and the default print reports for each section of Briefcase.

Select an option in the Filter Menu field to determine the default filter for that section (eg. choose Active Jobs so that the Job Bags Window will always display active Jobs).

Select an option in the Report in List View field to determine the default report when printing a list (eg. choose Work in Progress as the default report when you print Job bags in list view).

Select an option in the Report in Detail View field to determine the default report when printing a record (eg. choose Job Jacket as the default report when you print Job bags in detail view).

Section	Filter Menu	Report in List View	Report in Detail View	Export Script
Job Bags	Current Jobs	Work In Progress	Job Sticker	
Estimates		Estimates List	Estimate	
Purchases		Purchases List	Quote Request	Purchases : MYOB Account Edge 8 AU (MAC)
Invoices		Invoices List	Invoice	Invoices : MYOB Account Edge 9 AU (MAC)
Time		Time and Materials by Name	Time and Materials by Name	
Companies		Companies List	Companies Detail	
People		People List	People Envelope	
Rates		Rates by Tier 1	Rates by Tier 1	

Finding Records

Finding Records

Finding records

To find records, click the Find button in the appropriate window. When you perform a find, Briefcase searches through all the records in a table, comparing the criteria you specify with the data in the table. Records with data matching the criteria become the found set, which is the subset of records being browsed. Records that don't match are omitted. You can constrain (narrow) or extend (broaden) the found set.

You can work with just the records in the found set. For example, you can view, edit, calculate summaries for, sort, print, delete, export, or replace data in these records. You can also open a new window in order to perform different find requests on the same data. You can't perform a find in summary fields, container fields, or fields defined with the global storage option.

Making a find request

To make a find request:

1. Switch to Find mode by clicking Find.
2. In the find request, select a text, number, date, time, timestamp, or calculation field to use for finding, and then type a value in the field.
3. Click Find. Your find request returns a found set of records.

You can do one or more of the following during or after performing a find request:

Performing quick finds based on data in one field

You can perform quick finds based on field data without having to go to Find mode. You can perform a find based on an entire field or a selection of text within a field.

1. In Browse mode, select the text in a field you want to use for the find.
2. Right-click (Windows) or Control-click (Mac OS) the selected text. From the shortcut menu, choose Find Matching Records.

To	Do this
Cancel a find operation before	Press Esc (Windows) or Command-period (Mac OS).
Change or refine criteria after performing a find request	See 'Viewing, repeating, or changing the last find' on page 52.
Narrow an existing found set	See 'Constraining (narrowing) a found set' on page 51.
Broaden an existing found set	See 'Extending (broadening) a found set' on page 51.
Show all records again	In Browse mode, choose Records menu 〉 Show All Records. In Find mode, choose Requests menu 〉 Show All Records.
Open another window in order to perform different find requests on the same data	Choose Window menu 〉 New Window.

Finding text and characters

Search for text in text fields, or in calculation fields that return a text result.

Unless you search for phrases and exact matches, the field can contain other values in addition to the one(s) you specify, and the values can be in any order. For example, typing 'Brochure' in the field Job Title finds records for Colour Brochure, Brochure Design, and Brochures.

Finding numbers, dates, times and timestamps

Numbers, dates, times, and timestamps should be entered in the corresponding field types (or calculation fields returning the corresponding field type) to ensure correct behaviour when finding them.

To find	Type this in the field	Examples
A number in a number field or in a calculation field that produces a numeric result	The number	.50 finds.5,.50, and $.50
A Boolean number in a number field or in a calculation field that produces a Boolean result	1 to find True values 0 to find False values	1 finds 1 0 finds 0
A date in a date field or in a calculation field that produces a date result	The date as digits, separated by a valid date separator character (such as a slash or hyphen)	3/3/2010 finds 3/3/2010, March 3, 2010, and 3-3-2010
Today's date in a date field or in a calculation field that produces a date result	//	// finds April 4, 2010 (when the current date is 4/4/2010)
A time in a time field or in a calculation field that produces a time result	The time as digits, separated by colons	12:53:09 finds 12:53:09
A timestamp in a timestamp field or in a calculation field that produces a timestamp result	The date as digits, separated by a valid date separator character, then the time as digits, separated by colons	3/3/2010 12:53:09 PM finds 3/3/2010 12:53:09 PM
Invalid dates, times, timestamps, or calculated date or time results	?	? finds: Next Tuesday or 2/33/2010 in a date field, or midnight in a time field
Invalid data (fields containing no numbers) in a number field or calculation field that produces a numeric result	?	? finds: twelve but not 12 or twelve30
Dates on a day of the week in a date or timestamp field	The day of the week. NOTE: Full or short day names (eg. Friday or Fri) are acceptable in day of week searches	Tuesday finds all dates that occur on a Tuesday. =Thu finds all dates that occur on a Thursday
Any valid value for a date or time component in a date, time, or timestamp field	* or leave component unspecified, while specifying the other components you want to find after any hour	3/3/* finds the 3rd day of March in any year. *:15 finds times that are 15 mins.

To find values that are	Use this operator	Examples
Less than a specified value	<	<40 <9/7/2010 <M

To find values that are	Use this operator	Examples
Less than or equal to a specified value	<= or ≤ (Mac OS)	<=95129 ≤05:00:00 <=M
Greater than a specified value	>	>95129 >9/7/2010 >M
Greater than or equal to a specified value	>= or ≥ (Mac OS)	>=100 =9/7/2010 ≥8:00 ≥M
Within the range you specify. A range is different based on the data type: Numbers: least to greatest Dates & times: earliest to latest Text: first to last word, based on the index order of words (not the sort order)	.. or... (two or three periods)	12:30...17:30 1/1/2010..6/6/2010 A...M

To find dates	Type this in the field
In June 2010	6/2010
From July 2010 through October	2011 7/2010...10/2011
That occur on a Friday	=Friday
From the 10th through the 16th of October or November 2010 (if the date format is MM/DD/YYYY)	{10..11}/{10..16}/2010

To find times	Type this in the field
In the 3 o'clock hour, not including 4:00 PM	3 PM
Between 8:00 AM and 8:59:59 PM	8 AM..8 PM
In the morning	AM
Any of the times 4:30, 5:30, 6:30 PM	{4..6}:30 PM

To find timestamps	Type this in the field
In the 3 o'clock hour today	// 3 PM
In the 7 o'clock hour in May 2010	5/2010 7 PM
That occur on a Monday in 2010	=Mon 2010
From the 10th through the 16th of November 2010 and from 3:00 PM to less than 6:00 PM (if the date format is MM/DD/YYYY)	11/{10..16}/2010 {3..5} PM

Finding data in related fields

You can enter find criteria in related fields that are displayed in a portal or directly on a layout.

When you perform a find in a related field, Briefcase displays all the records that have a related record matching the criteria you enter. For example, suppose you have an Invoice file that displays line items as related records in a portal. To find all Invoices listing a computer, type *Computer* in the Item field in the portal.

Finding empty/non-empty fields

To find fields that are	Type
Not empty (fields that have data)	*
Empty	=

Finding duplicate values

You can find all records for which one or more fields contain duplicate values. For example, you might want
to find all records that aren't unique, then examine them to decide which records to use or delete.

To find all duplicate records, in Find mode, type *!* in the field.

Finding records that match multiple criteria

You can narrow or broaden your search by using more than one criterion.

Logical AND search

To narrow your search, enter criteria in as many fields as needed to make your request specific, then click Find.

Constraining (narrowing) a found set

You can narrow find results incrementally, looking for more specific detail as you search your database.

For example, after searching for all of the Contacts who work in Marketing, you can narrow the search to find all of the employees in Marketing named Smith:

1. Perform a find to find all of the Contacts who work in Marketing.
2. Briefcase displays the found set.
3. Click Find and type the criteria to narrow the search (type Smith in the Last Name field).
4. Choose Requests Menu › Constrain Found Set.
5. The found set now consists of Contacts in Marketing named Smith.

Note: To quickly constrain the found set in Browse mode, use the shortcut menu. Click in the field (or select a partial value in the field), then right-click (Windows) or Control-click (Mac OS), and choose Constrain Found Set.

Logical OR search

To widen your search, enter criteria in the first request. Click New Request. Enter the second (set of) criteria. Continue adding requests for each (set of) criteria, then click Perform Find.

You can navigate among multiple requests using Go to Request on the Requests menu or clicking the book in Find mode.

Extending (broadening) a found set

You can broaden a found set to expand your search to include additional applicable records without starting over.

For example, after searching for customers in New York, you can broaden the search to also find customers in Hong Kong:

1. Perform a find to find customers in New York.
2. Briefcase displays the found set in Browse mode.
3. Click Find and type the criteria to broaden the search (type Hong Kong in the City field).
4. Choose Requests menu › Extend Found Set.
5. The found set now consists of customers in New York and Hong Kong.

Note: To quickly extend the found set in Browse mode, use the shortcut menu. Click in the field (or select a partial value in the field), then right-click (Windows) or Control-click (Mac OS), and choose Extend Found Set.

Deleting and reverting requests

To delete a request, go to the request you want to delete, then click Delete Request.

To restore a request to the way it was when you last committed it, choose Requests menu > Revert Request. Requests are committed, for example, when you click out of all fields, go to a different layout or request, or perform a find.

Viewing, repeating, or changing the last find

To view the most recent find criteria, choose Records menu > Modify Last Find. Then, to return to the found set, switch to Browse mode. To repeat the find, click Find. Or you can modify the find criteria, then click Perform Find.

Finding and replacing data

As in a word processing application, you can find and replace data across multiple fields (including related fields) in a record or in a find request, across a found set of records or find requests, or across text objects in a layout. You can search for data in any type of field except container fields and fields that are not modifiable.

If you have added a tab control to a layout, when you find and replace data in Browse and Find modes, Briefcase only finds and replaces data in the tab panel that is in front. In Layout mode, Briefcase finds and replaces data in all tab panels.

1. In Browse, Find, or Layout mode, choose Edit menu > Find/Replace > Find/Replace.
2. In the Find what box, type the data you want to search for. In the Replace with box, type the replacement data.
3. You can't replace data in fields that are formatted as pop-up menus, radio buttons, or check boxes. These fields will be counted and reported as skipped at the end of a Replace all operation.
4. Set the search options you want to use.
5. Click one of the buttons to perform the type of find/replace operation you want.

For more information about finding and replacing data, see Help.

To Select	In Layout mode, do this
An option from the Direction list	Choose the search direction: Forward, Backward, or All.
Match case	Search for only those occurrences in which the capitalization matches the data you specified in the Find what box. NOTE: In files that contain Japanese data, a find with the Match case option cleared does not simultaneously find both the half-width and full-width version of the same character. To comprehensively find and replace both characters, perform separate finds for both the half-width and full-width character.
Match whole words only	Search for only those occurrences that are whole words or are bounded by spaces and/or punctuation characters.
An option in Search across	Browse mode, search across all records in the current layout or just in the current record. In Find mode, search across all find requests in the current layout or just in the current find request. NOTE: In Layout mode, Briefcase searches just in the current layout.

To Select	In Layout mode, do this
An option in Search within	In Browse and Find modes, search within all fields in the current layout or just in the current field.

Click	To
Find Next	Search for and select the next occurrence of the Find what data.
Replace & Find	If there is selected data that matches the Find what data: Replace the Find what data with the Replace with data, search for and select the next occurrence. If there is no selected data that matches the Find what data: Search for and select the first occurrence of the Find what data.
Replace	Replace the Find what data with the Replace with data.
Replace All	Replace all occurrences of the Find what data with the Replace with data. At the end of the Replace All operation, you see a summary of the number of occurrences found and replaced.

Exporting

Exporting

Exporting accounting data

Briefcase sales and expense data can be saved for import into various accounting packages. Refer to the Briefcase website for a complete list of currently supported accounting packages.

If your accounting version does not appear in the list you can request an export script to be created for you. Contact Briefcase support for further help.

To illustrate the process involved in exporting data the following example uses MYOB as the target for the example.

Exporting for MYOB

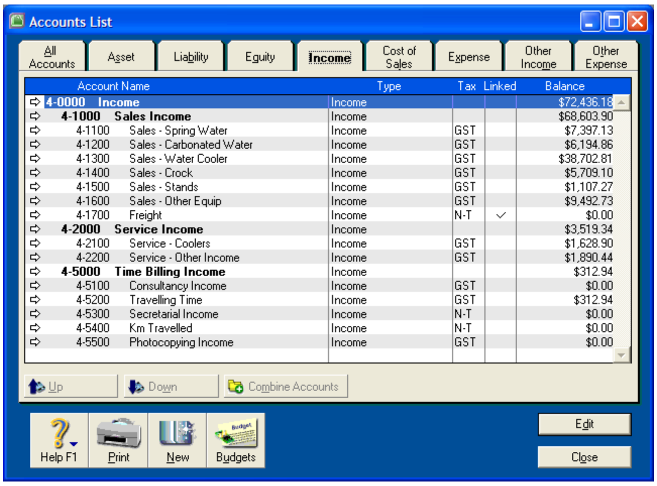
Before you start exporting accounting data you must setup Sales and Expense codes in the Rates section and the clients you will be invoicing in the Companies section.

Sales and Expense Codes

In the Rates section enter a Sales or Expense code for each Rate item. These codes should match the codes used in MYOB.

Rate			
Rate Name	Meetings	Code	MEET
Category	Account Service	Sales	4-1000
Options	☐ Billable ☒ Hourly	Expenses	6-1000

The MYOB Accounts List shows the chart of accounts from which you can obtain the codes.



Companies

Each Company in Briefcase must have a matching company in MYOB, known as a Card.

You can match these records by the Company Name or in some newer versions of MYOB by the Company ID (or Card ID in MYOB).

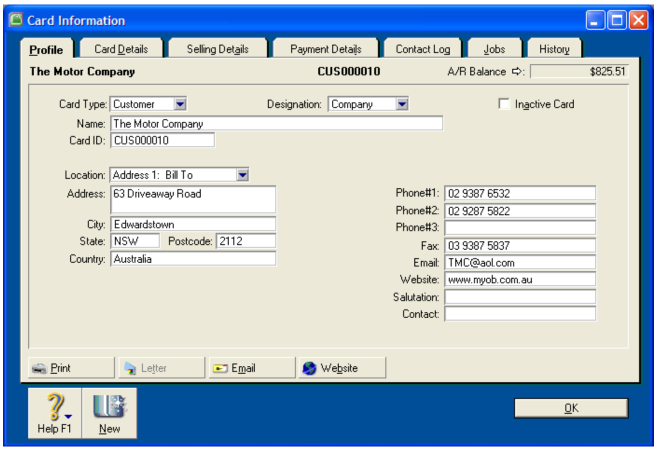
Briefcase Company = MYOB Card Name
OR
Briefcase Company ID = MYOB Card ID

Briefcase has a Company ID field this can be used as the Card ID match field in MYOB.

Details			
Company	Client	Metricon Homes	
Co. Number	60 123 344 332	Industry	Property
Group	Current	Manager	Alex Po

Settings			
Job Prefix	MET	Job Count	002
Rate Tier	Standard	Tax	GST
Terms	30 days from invoice date	Company ID	1215

The MYOB Card information window shows both the Name and Card ID for the customer.



IMPORTANT: If you decide to match the Company by Name, you must ensure that the fields match exactly, ie. all letter cases and spaces must be identical. To avoid errors do not match both Company Name and Company ID during import.

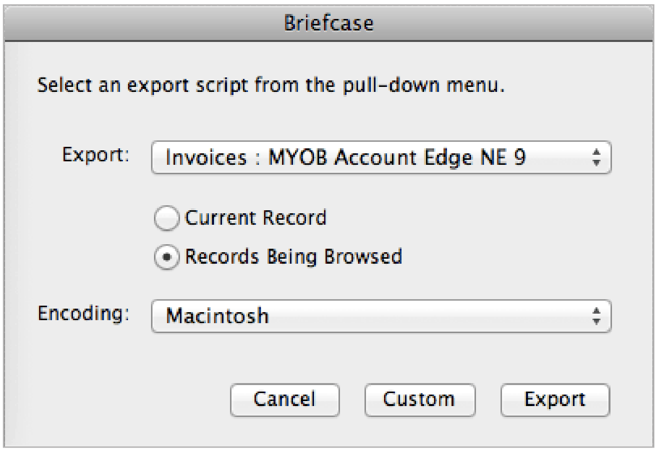
Settings

Select a default export script to match your accounting package in the Settings section under the Menus tab. There are default scripts for both Purchases and Invoices.

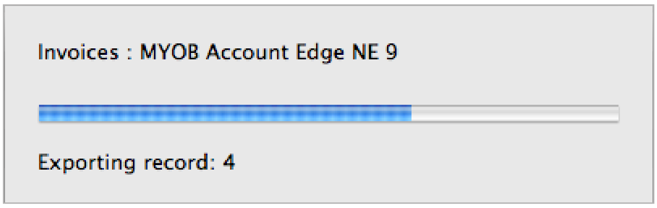
Exporting Invoices from Briefcase

The first step before each export is to find the records you wish to export. This can be done by using the Filter menu (ie. filter open Invoices) or by searching other fields such as date entered.

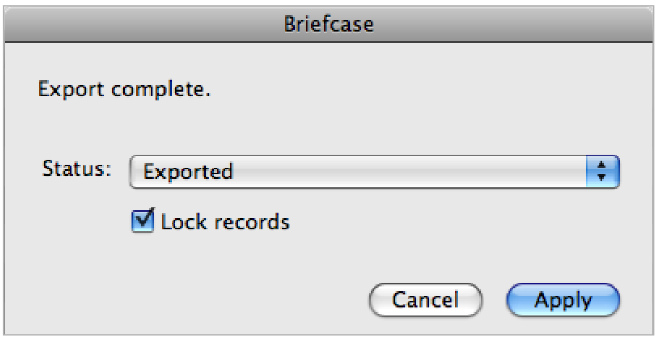
Click the Export button Export to export the current found records.



The Export dialogue will select the default script defined in the Settings Window. You can change these defaults before clicking Export.



After the export, the following dialogue will appear. At this point you can change the status of the records to Exported and Lock them to prevent any further changes to the records.

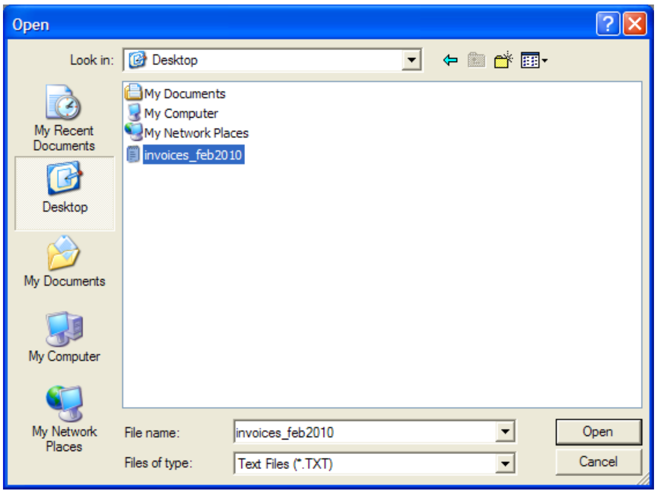


Exporting Purchases from Briefcase

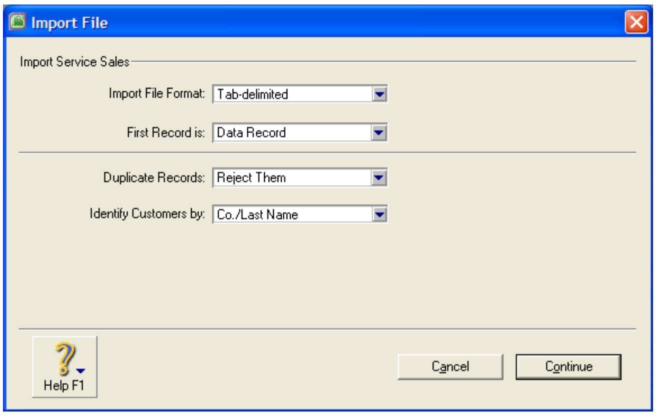
Follow the procedure for exporting Invoices in the Purchases section.

Importing to MYOB

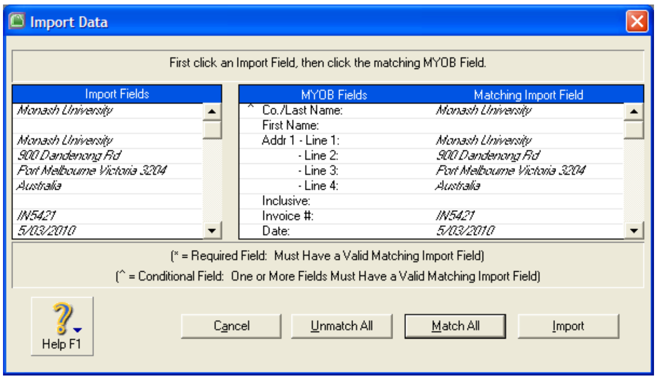
1. Start MYOB and open your company file.
2. Go to File › Import Data › Sales › Service Sales or File › Import Data › Purchases › Service Purchases.
3. Locate the export file and click Open.



4. In the Import File window ensure the Import File Format is 'Tab-delimited' and the First Record is 'Data Record'. Identify Customers should be by Co./Last Name unless you are using Card IDs to match the Companies.

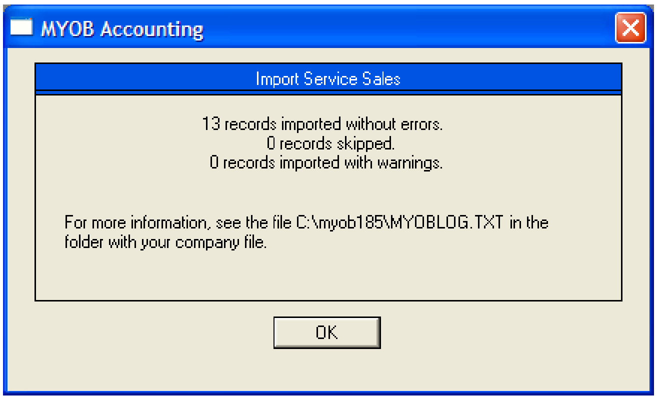


5. The Import Data window must match the Import Fields to the MYOB Fields. Click Match All, this will automatically match the Import Fields on the left with the MYOB Fields on the right.



6. The first time you Match All it is important to scan down the Matching Import Field list to check that each import field is in the right place. Click Import to continue.

7. Errors during import can be common but usually do not result in any skipped records. You can check the MYOB Log file if you have any concerns. Always check the imported records and totals.



Helpful Hint: Try importing records into a test company file first. You should always do a backup of your company file before importing data from Briefcase.

Exporting non-accounting data

You may wish to export your data, such as company details or employee times, in a file format such as Excel or plain text.

Go to the relevant section (eg. Companies) and click the Export button Export . In the popup dialogue give the export record(s) a file name and choose the location where you want the file saved. Select the preferred file format and click Save.

In the Specify Field Order for Export dialogue select and move the fields in the order you would like them to be exported. Click Export.

Creating/Editing Layouts

Creating/Editing Layouts

Creating and editing layouts with Briefcase requires FileMaker Pro (included with Briefcase). If you are using Briefcase you can request customised layouts via the Briefcase website.

To modify or create a new layout you first must decide where you would like the layout to appear. For example, if you want a new Estimate layout you should create the layout in the Estimates template file.

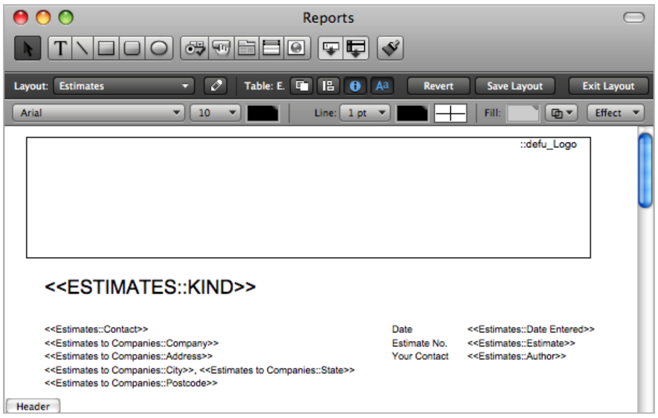
Template files can be found in the application folder directory titled Layouts. There is a file for each section in Briefcase.

Companies
Contacts
Jobs
Estimates
Purchases
Invoices
Rates
Time

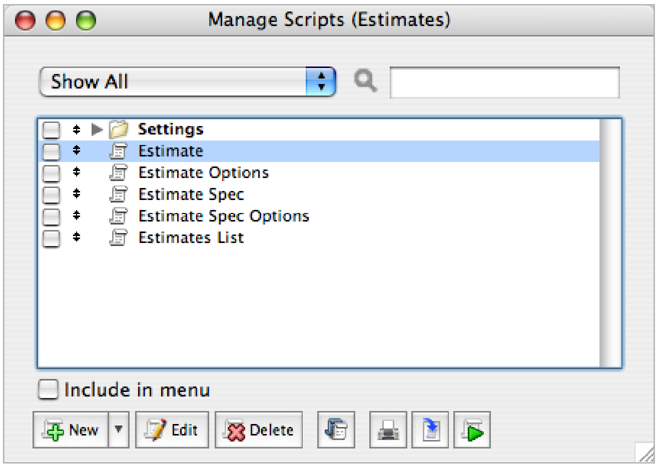
> **Helpful Hint:** The following section describes how to create layouts. If you are a beginner and you just want to edit an existing layout you should still read this section so you can practice by duplicating a layout first, and go back to an original if you need a backup.

Creating a layout

1. Open a Layout file.
2. Switch to Layout mode, choose View menu › Layout mode.

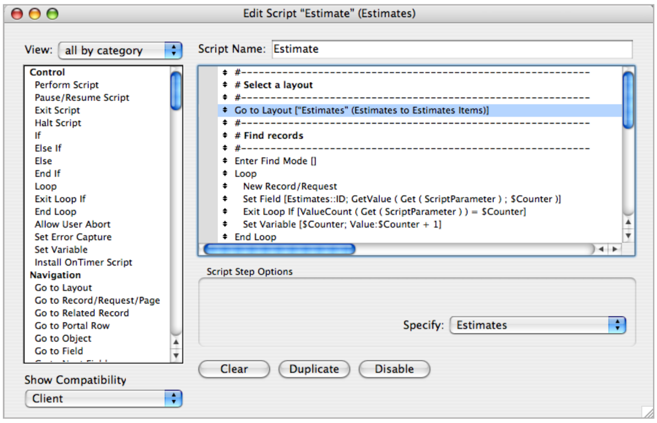


3. Select Layouts › New Layout/Report. If you intend to create a layout similar to an existing one, select a layout from the Layout: pull-down menu and then select Layouts › Duplicate layout.
4. To start using the layout you must create a layout script to target the layout.
5. Select Scripts › Manage scripts...

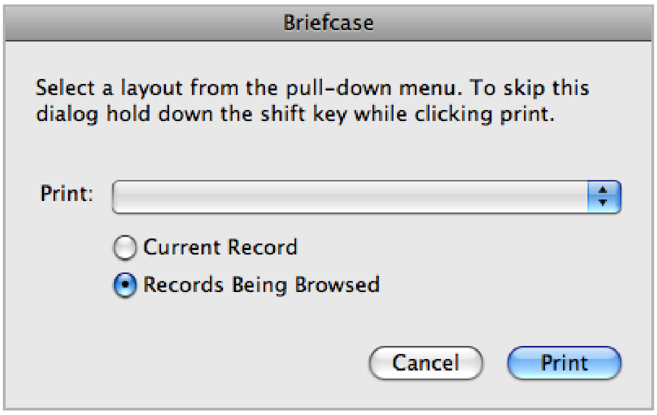


6. Duplicate an existing script by clicking Duplicate or create a new one by clicking New .

> **Helpful Hint:** Creating layout scripts from scratch requires some knowledge of how scripts in Briefcase work. It is much easier to duplicate an existing script and make changes as you need them.



7. Double click the new script to change the Script Name and edit the script steps.
8. Specify the target layout in the 'Go to Layout' script step.
9. Close the dialogue to save the changes.
10. The new layout can now be used in the corresponding section of Briefcase by clicking Print and selecting the layout from the pull-down menu.



Layout types

The following sections describe each of the layouts that you can create with the New Layout/Report assistant.

Standard form

A Standard Form layout is a good choice for data entry or onscreen browsing. It contains the fields you select, each on a separate line, in the order you specify, with field labels to the left of the fields. In Browse mode, you see one record, or form, at a time (unless you switched from Form View).

Columnar list/report

Use a Columnar List/Report layout when you want to view or print multiple records in rows (a list of records). You can define many variations of a Columnar List/Report with the New Layout/Report assistant. You can create a layout with simple rows and columns of data or a complex report with data grouped by specified values with subtotals and grand totals.

A Columnar List/Report layout contains the fields you select, in the order you specify from left to right across the page, with field names as column headings.

In the New Layout/Report assistant, you can choose to:

1. Limit the number of fields across the layout to the width of the page (defined by the page margins, page orientation, and printer). Fields wrap to multiple lines.
2. Group records by sorting. You can then subtotal, or subsummarise, data in the groups (for example, group records data by client, then group subtotal sales for each client).
3. Add header and footer parts with static text (like your company's name), dynamic text (like the page number or current date), or a graphic (like your company logo).
4. Save information in a script to re-run the report (for example, switch to the report layout, sort the data, and pause to let you preview the report).

You can modify any of these options after you complete the assistant.

Labels

Use a Labels layout to arrange fields you select to print on one of the predefined standard label sizes. (Briefcase includes the dimensions of a large number of standard label types.) If the label type you want isn't available, you can specify custom label dimensions.

With the Vertical Labels layout, Asian and full-width characters are rotated so that labels can be used vertically.

Envelope

Use an Envelope layout to print the fields you select, arranged to print on a standard 'Number 10' business envelope.

Blank layout

Use a Blank layout as the starting point for a layout that you create entirely from scratch. For example; a complex data entry screen. You add the fields and other objects you want on the layout in Layout mode.

For more information about Creating/Editing Layouts, see Help.

Setting up a layout to print records in columns

You can set up a layout to print (or preview) records in columns. For example, for a directory of names and addresses. This is in contrast to a Columnar List/Report layout, which arranges fields in columns.

When you set up records to print in columns, all the field values (and labels, if specified) for one record are printed together in a block (much like on a label), then all the values for the next record are printed together, and so on. You only see multiple columns in Layout and Preview modes and when you print (not in Browse mode or Find mode).

You can choose to arrange columns across the page or down the page.

To set up columns in a layout:

1. Choose a printer and print or page setup options.
2. Briefcase considers the selected printer, and print or page setup information when it calculates margins and other measurements on the layout.
3. In Layout mode, create a layout or choose a layout from the Layout pop-up menu.
4. It's easiest to start with a Blank layout or a layout with no objects in the body part.
5. Choose Layouts menu › Layout Setup.
6. In the Layout Setup dialogue box, click the Printing tab, select Print in ‹value› columns, select options for the columns, then click OK.

To	Do this
Specify the number of columns	For Print in ‹value› columns, type a number between 1 and 99.
Arrange records to flow across the page first (left to right a row at a time)	Select Across first. Use this option for reports like labels, to use the fewest number of rows and preserve label stock.
Arrange records to flow down the page first (top to bottom a column at a time)	Select Down first. Use this option for reports like directories, where you read from top to bottom, column by column.

7. On the layout, you see vertical lines indicating columns.
8. Place or arrange fields and other layout objects so they are contained within the sample column on the left.
9. Use merge fields or fields or objects with sliding enabled to fit more data into the width of a column. With either of these two features, fields can extend into the gray area of the second column, and blank space in fields is eliminated when you view or print data.

To change the width of columns:

The initial width of each column is calculated based on the paper size, orientation, and any margins you have set. To change the width of columns, do one of the following:

To	Do this
Interactively adjust the width of the columns	Drag the right column boundary (the vertical dashed line at the right edge of the sample column). If you widen the column, you see a medium-gray area that indicates a 'gutter' area that won't print.

To	Do this
Precisely measure and adjust the width of the columns	Choose View menu › Object Info. Position the pointer over the right column boundary and hold down the mouse button (be careful not to drag the column width). The column width is the second-to-last field in the Info palette.

If you change the number of columns, Briefcase adjusts the width of the columns to fit within the width of the paper size you have defined, not including fixed margins. You may need to readjust fields to fit within the sample column.

For more information about setting up a layout to print records, see Help.

Working with objects on a layout

An object is a discrete element—a field, text, a graphic object (such as an oval or imported picture), a button, a portal (for displaying rows of related records), a tab control, or a web viewer—that you can select, move, resize, delete, copy, format, and otherwise change. Place objects on a layout to enhance its design.

For each type of object you work with, you use specific tools from the status toolbar.

Note: If you don't see the status toolbar at the top of the document window, it might be hidden. Make sure you're in Layout mode, then click the status toolbar control button at the bottom-left corner of the document window (or choose View menu › Status Toolbar).

Using the Info palette with objects

You can use the Info palette to precisely position or size layout objects or you can set objects to automatically resize or move horizontally or vertically when the Briefcase window is resized. Horizontal settings also apply to Preview mode and printing when the page size is wider than the size of the layout being viewed or printed.

When layout objects are set to resize, they maintain a constant distance from the object to which they are anchored. This allows objects to move, expand, or contract when the Briefcase window is resized.

Anchor points are either the layout margin or the container margin in which an object resides. By default, objects are anchored on both the top and left side of the layout or page.

The Info palette floats above document windows, so you can leave it open as you work.

Precisely positioning or sizing objects

To precisely position and size objects with the Info palette:

1. In Layout mode, choose View menu › Object Info.
2. Select one or more objects on the layout.
3. The Info palette fields are updated to show the exact location of the selected objects in the layout.

TIP: You can change the unit of measure used in the Info palette and graphic rulers by clicking the unit label for any field in the Info palette or by clicking the unit label in the top left corner where the graphic rulers meet.

In the Info palette, type a new value in one of the following fields.

Field	Indicates
Object Name	The name of the selected object (optional). You can assign names to objects and grouped objects. Some script steps and functions use these names to specify which object to act upon. For more information, see Help.
	The distance from the left edge of the selection to the left edge of the layout
	The distance from the top of the selection to the top of the layout
	The distance from the right edge of the selection to the left edge of the layout
	The distance from the bottom of the selection to the top of the layout
	The object's width
	The object's height

If you can't type a value, it means that specific field doesn't make sense for the selected object (for example, a horizontal line doesn't have a height), or the selection is locked.

Press Enter, Return, or Tab, or close or click outside the Info palette to apply the change.

Note: To precisely position an object while dragging it, note the values in the Info palette.
The values dynamically update to reflect the position as you move an object around the layout.

Allowing objects to resize or move on the layout

When layout objects are set to resize, they maintain a constant distance from the object to which they are anchored. This allows objects to move, expand, or contract when the Briefcase window is resized.

Anchor points are either the layout margin or the container margin in which an object resides. By default, objects are anchored on both the top and left side of the layout or page.

To allow objects to resize or move when the Briefcase window is resized:

1. In Layout mode, choose View menu › Object Info.
2. Select one or more objects on the layout.
3. In the Info palette, select the that indicates the side of the object that you want anchored to the layout or container.
4. For example, to allow an object to maintain its horizontal position on the layout and expand the right when the window is made wider, leave the default left and top anchors selected and select the right anchor.

Auto-resize setting changes take effect as soon as you specify anchor selections.

Objects located in containers on layouts (such as fields located in tab panels or portals) do not inherit resize settings from their container. For example, if you want fields on a tab panel to resize with the tab panel, you must specify resize settings for the tab panel and fields located in it. If the Briefcase window is made smaller than the size of the original layout, objects set to resize are not reduced beyond their original size.

For more information about setting objects to resize, see Help.

Selecting objects

To work with an object on a layout, select it in Layout mode. You see small black squares, or handles, at the corners of the selected object.

To select an object, click the selection tool in the status toolbar. The pointer becomes an arrow pointer. Then do one of the following:

Note: If an object's selection handles are gray instead of black, the object is locked.

To Select	In Layout mode, do this
One object	With the arrow pointer, click the object. (If the object is transparent, click its border.)
Several objects at once	Drag the arrow pointer to make a selection box that completely surrounds the objects. (If you press Ctrl (Windows) or 2 (Mac OS) while dragging, the selection box does not have to completely surround the objects.) Or, press Shift as you click each object individually.
All objects on the layout	Choose Edit menu › Select All.
All objects of the same type (for example, all text objects or all rectangles)	Choose View menu › Arrange Palette to show the Arrange palette. Select an object, then click the Select Objects by Type button in the Arrange palette. Or, click the tool for the type of object to select, then choose Edit menu › Select All. (This method does not work for buttons, fields, and portals.)
All fields	With the arrow pointer, click a field, press Shift (Windows) or Option (Mac OS), and choose Edit menu › Select All (Windows) or Select Same (Mac OS). Or, select a field, then click the Select Objects by Type button in the Arrange palette.
A portal	With the arrow pointer, click the border of the portal, or any other area within the portal that doesn't contain a field or object.

Working with fields on a layout

After you create a layout, you can place fields on it, remove fields you don't want displayed, determine control settings for data entered in fields, and determine the format in which you want data displayed.

Fields on a layout are objects, which you can select, move, resize, and reshape. In Layout mode, each field displays its field name, formatted with its attributes for font, size, style, alignment, line spacing, and colour. All fields except container fields display text baselines to dictate where the data appears in Browse mode and to help you align fields with each other.

Keep these points in mind:

1. A field that doesn't appear on a layout still exists in the database, and its data can be used in calculations and summaries.
2. To set the default formatting, appearance, and behaviour of a field, choose options with no fields selected. Briefcase applies these defaults to all fields added later. (See Help.) You can also specify options individually for each field.

Note: Options that are set in the Field/Control Setup dialogue box cannot be defined as defaults.

Placing and removing fields on a layout

You can place a field anywhere on any layout, as many times as you want. (You can place only fields that you've defined.

You get different results by placing the same field in different locations on the layout. For example:

1. Add the same summary field to a subsummary part to calculate totals for each group of sorted records, and to a grand summary part to get totals for all the records in a table.
2. Add a field to the header or footer part to repeat data from the first record or the last record on the page as a header or footer. (For example, add a Last Name field to the header in a directory.)
3. Add the same related field directly on a layout to see the field's value in the first related record, or inside a portal to see values from more than one related record. (A portal is a layout object that displays records from related tables.)

To place a field on a layout:

1. In Layout mode, choose the layout you want to work on from the Layout pop-up menu.
2. Click the Field tool. (Or choose Insert menu › Field.) Then position the cursor where you want the field on the layout.

Holding down the mouse button, draw the field on the layout. You see a border and text baselines to help you align the field with other objects on the layout. Release the mouse button when the field is where you want it.

Alternatively, if you want to display field data in a drop-down list, pop-up menu, check box set, radio button set, or drop-down calendar, use the Field/Control tool (or choose Insert menu › Field/Control). See the next section, 'Setting up check box sets and other controls on a layout,' for more information.

Note: If you're placing a related field in a portal, position it in the first row of the portal. Make sure each field in the portal is from the same related table from which the portal is set up to display records.

1. In the Specify Field dialogue box, select the field to place.
2. To choose a field in another table, choose the table from the table list above the list of fields. Then select a field from the fields list. Or choose Manage Database in the table list to create a relationship
   or table.
3. To include the field name as text on the layout, select Create label.
4. Click OK.
5. You see the field name in the field on the layout unless you have chosen to display sample data from the current record (by choosing View menu › Show › Sample Data). Fields from related tables appear as ::Field Name (preceded by two colons).

To replace a field with another, in Layout mode, double-click the field, then select another field name in the Specify Field dialogue box and click OK.

To remove a field from a layout, in Layout mode, click the field to select it, then press Backspace or Delete, or choose Edit menu › Clear. Removing a field from a layout does not delete the field or its data from your database.

Setting up check box sets and other controls on a layout

You can format fields to display as drop-down lists, pop-up menus, check boxes, radio buttons, and drop-down calendars. You can also format fields to auto-complete by suggesting possible matches as the user types data in the field. All of these options aid in data entry.

To set up a field to display a pop-up menu, check box set, or other control:

1. In Layout mode, double-click the field (or select the field and choose Format menu > Field/Control > Setup).
2. If the field isn't already on the layout, click the Field/Control tool and drag the crosshair pointer to add a field object to the layout. Then, in the Field/Control Setup dialogue box, specify the field you want in the Display data from area.
3. If the field hasn't been defined yet, choose File menu > Manage Database to define a new field.
4. In the Control Style area of the Field/Control Setup dialogue box, for Display as, choose:
5. Edit Box
6. Drop-down List
7. Pop-up Menu
8. Check box Set
9. Radio Button Set
10. Drop-down Calendar
11. For example, use a radio button set to display a value list of frequently used text, number, date, or time values. During data entry, users can choose from the defined values rather than type the values.
12. When you choose different control styles, the dialogue box changes to display different options.
13. Choose options for the control style.
14. For example, for Display values from, choose an existing value list or choose Manage Value Lists.
15. To set up fields to suggest possible matches as the user types data in the field, select Auto-complete using value list. or Auto-complete using previously entered values.
16. Click OK.

For more information on defining value lists and using auto-complete, see Help.

Where to place related fields

You can place related fields directly on layouts or in portals.

1. Directly on layouts: Place related fields directly on a layout to display data from the first related record, even when there are more than one related records that matches the criteria of the relationship. (The first related record that's displayed is determined by whether the relationship specifies a sort order.)
2. In portals: Place related fields within a portal on a layout to display data from all related records that match the criteria of the relationship. For examples of when to place related fields in portals, see Help.

About Merge Fields

Use merge fields to combine field data and text in documents like form letters, labels, envelopes, or contracts. You create merge fields in text blocks, which allows you to use static text and field data together.

Merge fields shrink or expand to fit the amount of text in the field for each record. For example:

1. When the merge field <<First Name>> is between the text Dear and a colon, (as in Dear <<First Name>>:), Briefcase displays Dear Charles: in Browse mode or Preview mode if the First Name field contains Charles.
2. When a merge field is on a line by itself (such as an empty Address Line 2 field in a mailing label), Briefcase removes the blank line from the text block.

Briefcase uses merge fields to create Labels and Envelope layouts.

Formatting field data on a layout

Use Briefcase field formats to control how data appears on a layout. The formats you specify don't change the data as it's stored in the database, and you can specify different formats each time you place a field on a layout (whether it's on the same layout or a different layout). For example, if you enter –5123 into a number field, you can format it in one place to display as –$5,123.00 and in another place as ‹5123›.

Briefcase applies field formatting in the following precedence:

1. If you don't specify formats, Briefcase displays numbers, dates, and times based on the system formats set in the Regional and Language Options control panel (Windows) or the International pane in the System Preferences (Mac OS) when the file was created.
2. In Briefcase, you can specify display formats for text, number, date, time, timestamp, or container fields with no objects selected. Briefcase applies these default formats to fields you place on layouts later. For number, date, time, and timestamp fields, these display formats override the system formats.

Specifying text formats for fields

In Layout mode, you can specify a set of text character attributes for each field. All the characters in that instance of the field (including all repetitions of repeating fields) share the same font, size, style, colour, line spacing, tab, and paragraph settings.

Note: You can also format characters in text fields in Browse mode (for example, italicize or underline a word for emphasis). Unlike text formatting specified in Layout mode, this formatting is stored with the data, and you see it in any layout that displays that field.

1. In Layout mode, select one or more fields, then choose Format menu › Text.
2. Or, to set text formats for fields you place later, start with no fields selected.
3. In the Text Format dialogue box, select the formats you want to use.
4. You see examples of the options you choose in the Sample area.

Specifying formats for fields containing numbers

You can control how Briefcase displays the values in number fields, calculation fields with numeric results, and summary fields.

1. In Layout mode, select one or more fields that display numeric values.
2. Choose Format menu › Number.
3. In the Number Format dialogue box, select the formats you want to use.
4. You see examples of the options you choose in the Sample area.
5. Click OK.

Specifying formats for date fields

You can control how Briefcase displays the values in date fields, and calculation fields with date results.

Note: To avoid confusion when using dates in fields, Briefcase recommends that you always format date fields to display four-digit years.

1. In Layout mode, select one or more date fields or calculation fields with a date result.
2. Choose Format menu › Date.
3. In the Date Format dialogue box, select the formats you want to use.
4. You see examples of the options you choose in the Sample area.
5. Click OK.

Specifying formats for time fields

You can control how Briefcase displays time values in fields.

1. In Layout mode, select one or more time fields, or calculation fields with a time result.
2. Choose Format menu › Time.
3. In the Time Format dialogue box, select the formats you want to use.
4. You see examples of the options you choose in the Sample area.
5. Click OK.
6. If you want to format the seconds component to display fractional seconds, continue with the next step.
7. Choose Format menu › Number.

8. In the Number Format dialogue box, select the formats you want to use.
9. Only two options affect the display of the seconds component: Fixed number of decimal digits and Decimal separator. The remaining options have no effect.
10. Click OK.
11. Click OK again.

Specifying formats for timestamp fields

You can control how Briefcase displays timestamp values in fields. You format a timestamp field by separately formatting its three components: date, time (excluding the seconds portion), and seconds (including fractional seconds).

1. In Layout mode, select one or more timestamp fields, or calculation fields with a timestamp result.
2. To format the date component, choose Format menu › Date.
3. In the Date Format dialogue box, select the formats you want to use and click OK.
4. To format the time component (except the seconds portion), choose Format menu › Time.
5. In the Time Format dialogue box, select the formats you want to use and click OK.
6. To format the seconds and fractional seconds component, choose Format menu › Number.
7. In the Number Format dialogue box, select the formats you want to use and click OK.
8. Only two options affect the display of the seconds component: Fixed number of decimal digits and Decimal separator. The remaining options have no effect.
9. You see examples of the options you choose in the Sample area.

Specifying formats for container fields

You can control how Briefcase displays images and file icons in container fields.

Note: The following instructions also apply to formatting graphic objects that you insert onto a layout.

1. In Layout mode, select one or more container fields or inserted graphics.
2. Choose Format menu › Graphic.
3. In the Graphic Format dialogue box, select the formats you want to use.
4. You see examples of the options you choose in the Sample area. File icons do not scale.
5. Click OK.

Working with parts on a layout

Briefcase layouts are divided into layout parts, sections of the layout that determine how data in a field is treated and displayed. By using parts, you can control how Briefcase prints data, for example:

1. once for each record
2. only at the top of each page
3. only before or after groups of sorted records (for example, to include a subtotal for each group of records)

Each layout must have at least one part. Layout parts can contain fields, portals, buttons, text, and other objects.

In Layout mode, dotted horizontal lines mark the division between layout parts, and the part label appears at the left end of the bottom dividing line.

The New Layout/Report assistant automatically creates the appropriate layout parts depending on the choices you make. You can add, change, or delete layout parts after you finish the assistant as needed. (See 'Creating/Editing Layouts' on page 59.)

About layout part types

The following table describes layout part types.

Layout part	Description
Title header	Appears only once at the top of the first screen or page and replaces the normal header (if one is specified). In reports, can be used to print a separate title page. You can have only one title header in a layout.
Header	Appears at the top of every screen or page (unless you add a title header, which supersedes the header on the first page). Use for titles or column headings (in columnar reports). You can have only one header in a layout.
Body	Each object you put in the body, including fields, text objects, and graphics, appears once for each record in the found set. You can have only one body in a layout.
Footer	Appears at the bottom of every screen or page (unless you add a title footer). You can have only one footer in a layout.
Title footer	Appears only once at the bottom of the first screen or page and replaces the normal footer (if one is specified). You can have only one title footer in a layout.

To include summary data on a layout (for example, subtotals, grand totals, averages, counts, and so on), you place summary fields in summary layout parts. Summary parts include grand summary and subsummary parts.

1. A grand summary part usually contains one or more summary fields that display summary information (like totals) about all records being browsed.
2. A subsummary part usually contains one or more summary fields that display 'subsummary' information (like subtotals) for a subset of records. The records are grouped (sorted) by values in another field, the break field. Whenever the value of the break field changes, the report 'breaks' and Briefcase inserts the subsummary part. Subsummary parts appear in Table View and List View when sorted by break fields, and update dynamically whenever data in the file is changed.

Notes

Notes