



Reference	FAMILIAR.doc	Last updated	8 May 2009
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Familiarisation Training

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Learning Outcomes

In this lesson you will learn how to work with the standard features of SoEasy.

Requirements and Prerequisites

SoEasy should already be installed on your PC.

Video

There are videos available on this subject.

Overview

By learning the basic layouts and methodologies used in SoEasy, you will gain a level of skill that will assist you in using the program. This is one of the most important parts of training.

The Front Company Menu

The Front Company Menu is the first screen that appears when you open SoEasy. Remember this screen's name, as it is referred to often.



The above arrows are as follows

1. Select your **company** name with your mouse to go into your company's data (single click).
2. If you require support, select **get support**.
3. **Set up printers** for the current workstation.
4. Check for the latest **update** to SoEasy.
* If using a network version of SoEasy, only update the server and the workstations will automatically update.
5. **Back up** your data.

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Main Menu

For each module of SoEasy, there is a Main Menu screen that provides access to different areas of the program.



The arrows above are as follows

1. The name of the current module.
2. Click to access a specific module.
3. Commonly used areas of the module are accessible through the grey buttons.
4. Less commonly used areas are white with an orange edge.
5. The exit button (sometimes a return button) is usually at the bottom right of the screen.

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Accessing Modules

There are many different modules available with SoEasy and to access some of them (but not all)

1. Come to a Main Menu screen (as shown above)
2. Select the module's name on the left.

To view other modules, select the **activate modules** word on the top bar (under SoEasy Logo) with your mouse and choose which modules you would like to review. If you are not registered for the modules you will have a limited time to see if they suit your business activity before they must be purchased and registered.

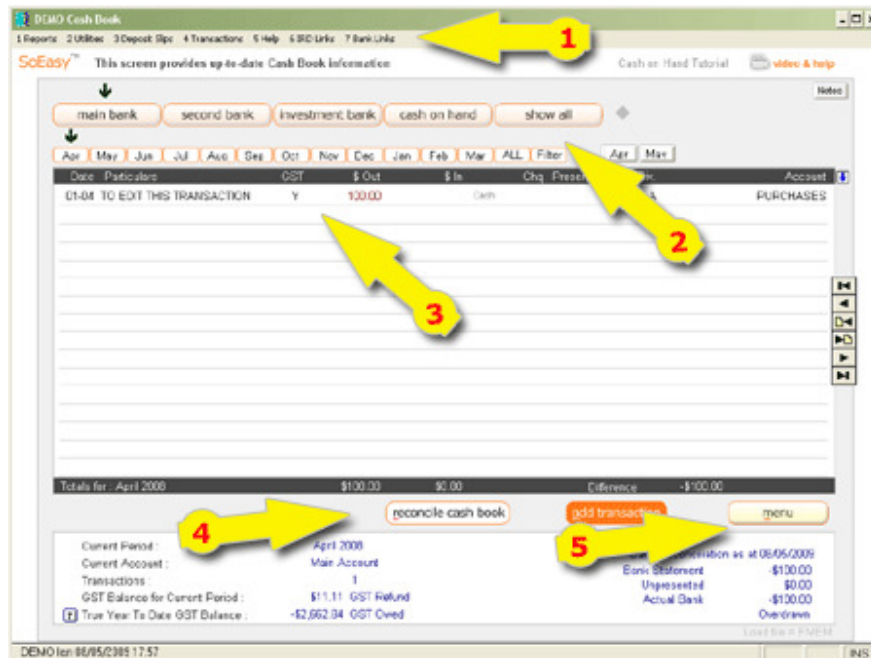
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Setting up

To get the most out of any system you need to set it up to suit your requirements. At each module's Main Menu there is a **Set up** button (see picture above, Arrow 4). Work your way through the various set up options. If you would like professional advice on setting up the system please [book a service](#)

General Screen Layouts

The screens of SoEasy all have a common theme.



This is the Cash Book screen which is used for adding/editing and deleting receipts and payments.

The arrows above are as follows

1. The Top Menu bar provides access to certain reports and features.
2. Select a button to filter a display or go to another screen.
3. This is data that has been entered. A single click of the mouse will allow you to edit the data. A dialog box will appear, which will present the data for editing and in most cases provide you with a button to delete the transaction.
4. Buttons allowing you to add data or perform another action.
5. The correct way to exit the screen is usually on the bottom right of the form. These are **menu**, **exit**, or **return**.

The screens have been designed to reduce eye fatigue. Once you are familiar with the basic layouts you can work your way through the screens very quickly.

We do not use Microsoft standard layouts because our tests showed that they are not as quick as the layouts designed in SoEasy.

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Exiting a Screen

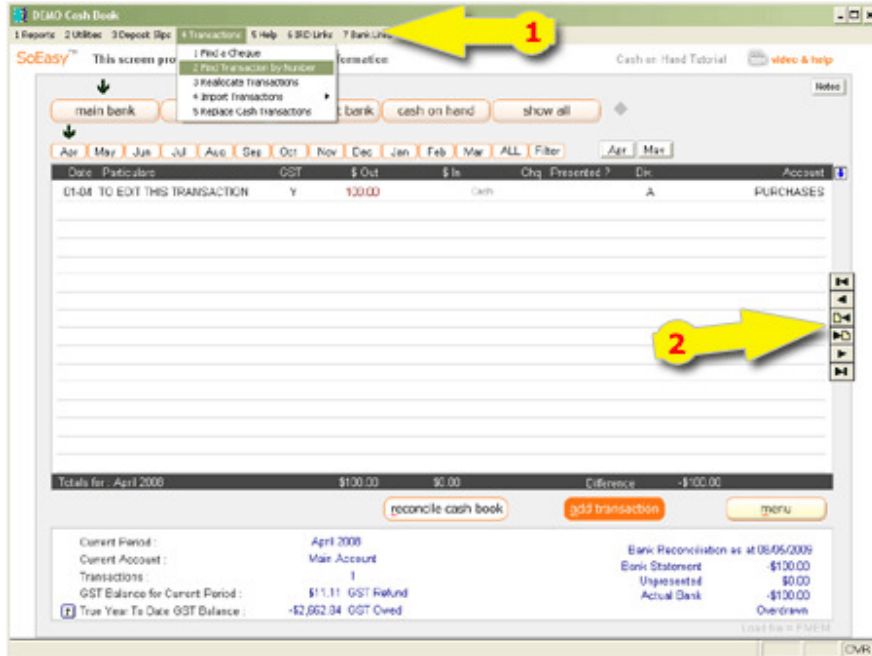
It is important to notice that most exits from a screen are on the bottom right. The correct way to exit SoEasy is to click through the **return**, **menu** and **exit** buttons until you return to **The Front Company Menu**. Using this process SoEasy performs a series of 'house keeping' events which will help your system maintain itself.

If you do happen to use the top right X button no damage will be done, but do try to exit SoEasy in the correct manner.

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Top Menus

Top menus provide access to additional functions such as printing and special features. They are not used frequently.



The arrows above are as follows

1. Top menu bar
2. Side scroll bar

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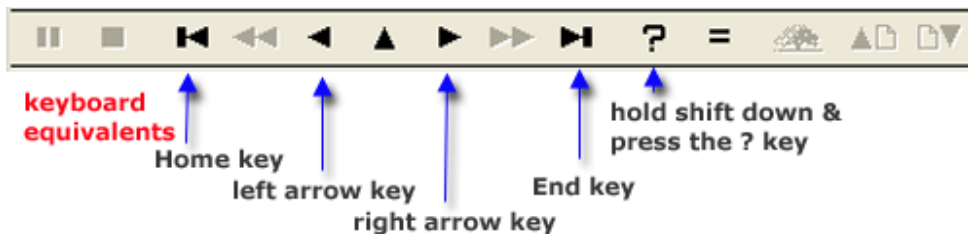
Side Scroll Bars

Side scroll bars will scroll up and down through data displayed on the screen.

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Bottom Search Bar

The bottom scroll bar appears in many screens and provides a quick way of finding data. It is used frequently so it is a good idea to learn the quick keys.



The ? key is a very important key; hold the **shift** key down + press the ? key and a **key lookup** box will appear. You can use this key lookup box to find information fast. For example, in the Database, use the **Shift + ?** key to find a customer.

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Keyboard Shortcuts

It is very common for people to use a mouse to select buttons however many buttons have keyboard equivalents.



For example

To add a contact to the database you could hold the **Alt** key down and press the letter **A**.

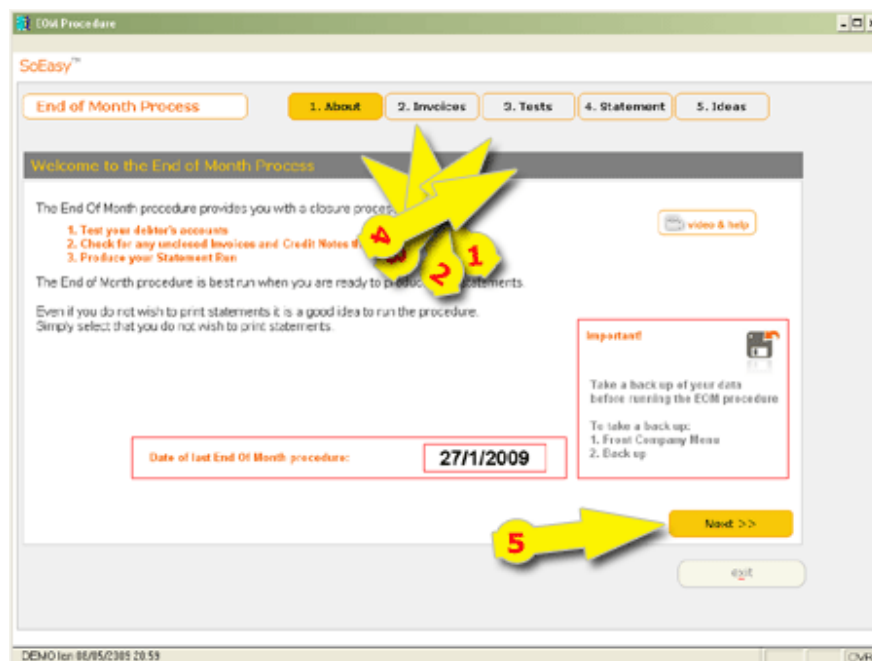
To edit the current contact, hold the **Alt** key down and press the letter **E**.

While the Keyboard shortcuts may initially be time consuming to learn, the skill you require means faster processing in the long run. It is possible to save up to 20% of your day if you learn the shortcuts.

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Guidance Screens

A common screen layout is called a **Guidance Screen**. It provides a step by step process where you work your way through a specific set of screens and procedures to achieve a result.



End of Month Guidance Screen.

The arrows above are as follows

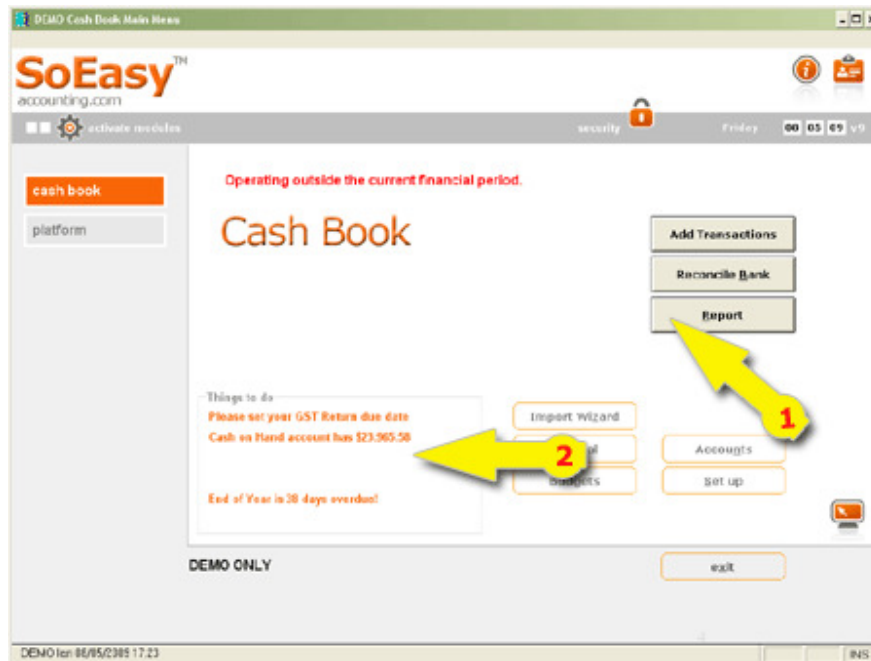
1. Work your way through the different screens.
2. Or select the **Next** button to be taken through the screens

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Reports

SoEasy has 100s of reports and the trick is to know where to access them.

Most reports are available through the module's **Reports** section.



The arrows above are as follows

1. Cash Book's main reporting section where you can produce a wide variety of reports.
2. When a task is due SoEasy automatically prompts you. Select the prompt with your mouse and you will be taken to a Guidance Screen. In this example you would be guided through producing your GST Return, reconciling your cash account, and producing the End of Year reports.

Most modules have their own **Report** button at the module's **Main Menu** screen.

There are other places where reports are available and there is usually a button called **Reports** for your convenience.

Some reports can be exported to a spreadsheet. If SoEasy has identified your spreadsheet application, when you export a report or data to a spreadsheet, it is automatically opened. (See the **Setting up Training Module** for details on how to set up other applications to work with SoEasy.)

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Working with Dialog Boxes

Dialog boxes play a major role in data input. When you add or edit a transaction, the data will normally be displayed in a dialog box.

This is the Cash Book's **Add a Transaction** dialog box.

Dialog boxes are very quick to work through. Perhaps the biggest mistake that people make when using a dialog box is to think that you press the Enter key to move to the next cell. This is not correct. The Enter key will execute the highlighted button. In the above example, pressing the Enter key would execute the **Accept** key (notice how it has a dark line around it?).

Practice keyboard skills by opening a dialog and trying the following key strokes

To move to the next cell -----press the **Tab** key

When information is highlighted as in GULL FUEL above -----replace by typing over

To toggle between radio buttons (Payment & Receipt) -----left and right arrow keys

Toggle **Yes** and **No** (**Amount include GST?**)-----use the space bar

Button (like the **Accept** or **Cancel** button)-----use **Tab** until it is highlighted and press the **Enter** key

HINTS

- If you do not want to work with a dialog box, or perhaps just cancel it, you can press the **Esc** key on your keyboard (top left of your keyboard).
- When a dialog box is present, you must complete it (select **OK**, **Cancel**, **Esc**, or **Delete**) before you can exit the form or action any other procedure in SoEasy.

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Adding Data

Adding data to SoEasy is a simple process as follows

1. Go into the correct module and screen
2. Select the **Add** button
3. A dialog box will appear; fill in the details
4. Select **OK** and the data you loaded will be checked to see if it is correct
5. Then the system will automatically save the data for you.

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Editing Data

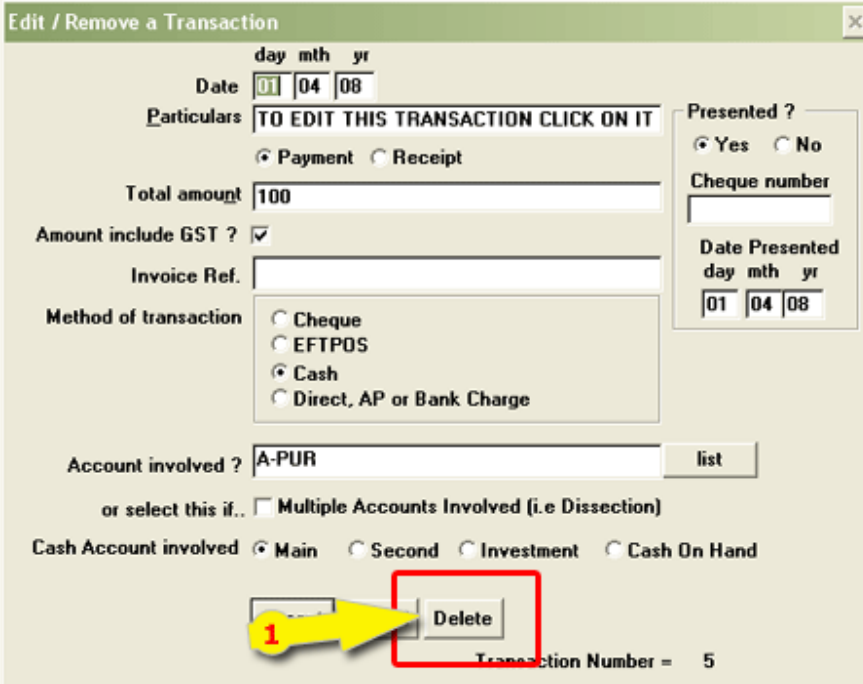
To edit data

1. Find it
2. Select it with your mouse (one click)
3. A dialog will appear
4. Change the data to suit
5. Select the **OK** button.

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Deleting Data

Edit the data as above. When the dialog box appears select the **Delete** button.



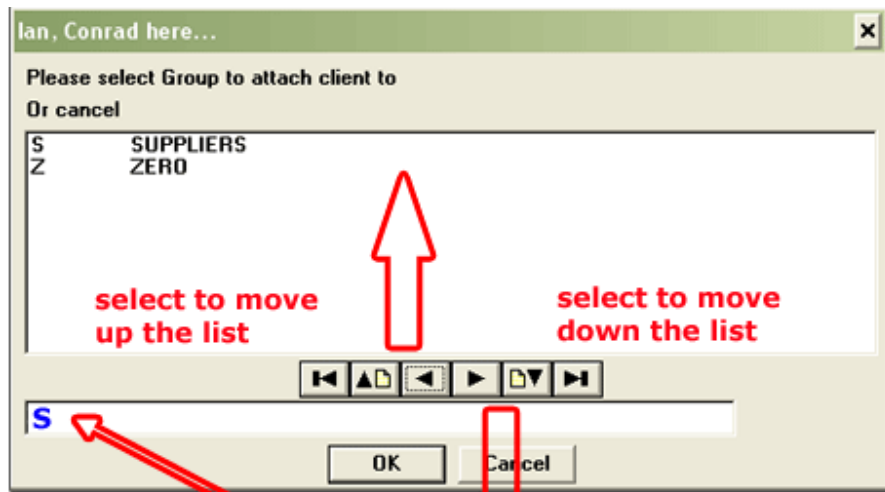
The screenshot shows a dialog box titled "Edit / Remove a Transaction". The dialog box contains the following fields and options:

- Date: 01 | 04 | 08
- Particulars: TO EDIT THIS TRANSACTION CLICK ON IT
- Payment / Receipt: Payment Receipt
- Total amount: 100
- Amount include GST?:
- Invoice Ref.:
- Method of transaction: Cheque EFTPOS Cash Direct, AP or Bank Charge
- Account involved?: A-PUR list
- or select this if.. Multiple Accounts Involved (i.e Dissection)
- Cash Account involved: Main Second Investment Cash On Hand
- Buttons: OK, Cancel, **Delete** (highlighted with a red box and a yellow arrow with '1')
- Transaction Number = 5

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Lists

Sometimes a list box will appear.



'Suppliers' is displayed because the list box is currently searching for 'S' and 'Suppliers' is the closest match. There are other values in the list but they can't be seen. Use the buttons on the pick list box to scroll up and down the list.

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In Summary

On completing this lesson you should now feel relatively comfortable with some basic features of SoEasy.

Practice using the keyboard shortcuts. They soon become second nature and you will find that you get your work done much faster. It's like learning to drive a car, awkward at first but it soon becomes second nature where you actually no longer think about it, it just happens.

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