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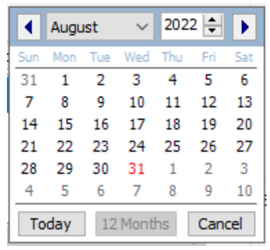
General Tips & Tricks

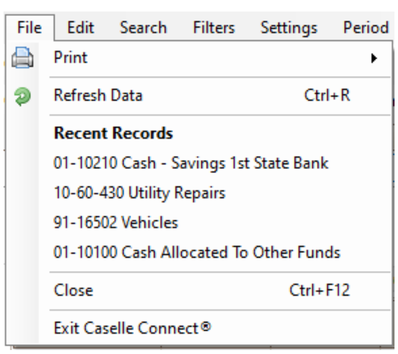
Navigation Tips & Tricks

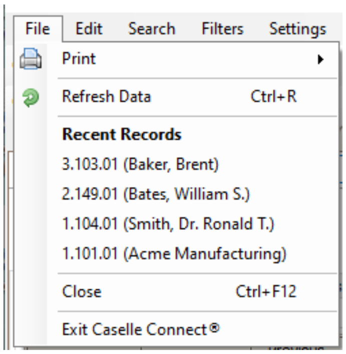
- Calendars & Date fields
  - When you need date from the last few days of the previous month or the first few days of the next month when you are on a calendar you can click on the dates that are grayed out without needing to click back a full month.

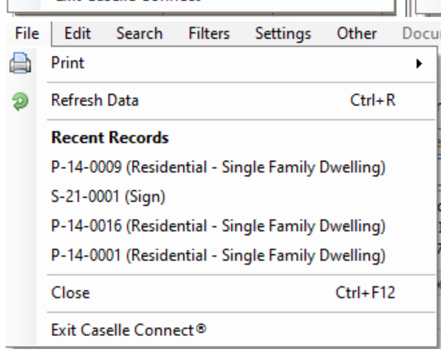


  - If you need to get back to Today's date quickly, click the Today box on the Calendar.
  - On a date field on a screen with a gray background, the + and - keys can be used to go forward (+) or backward (-) one day at a time.

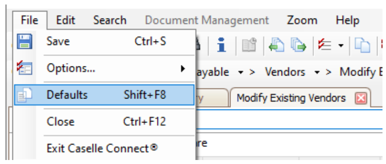
- Recent Records
  - From most Inquiry screens, click on the File Menu the last 10 records accessed will be listed under Recent Records. You can click on the record you wish to return to.



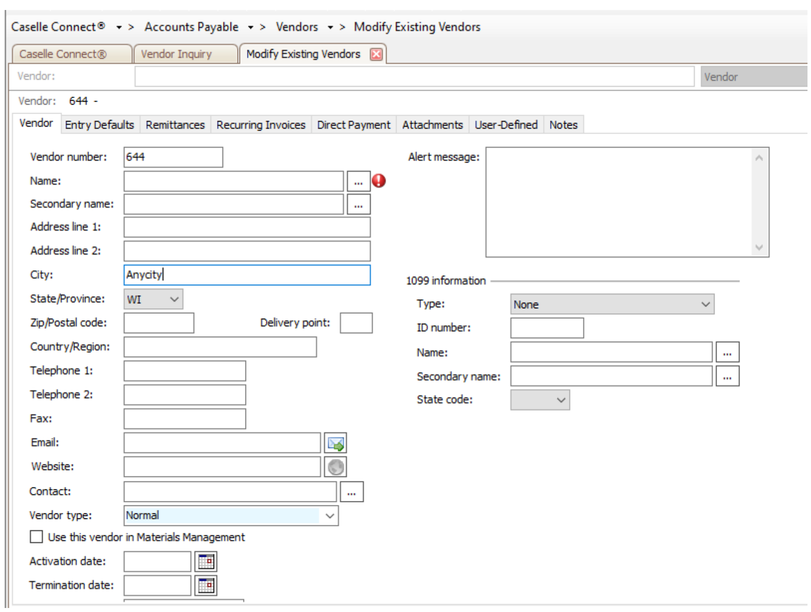




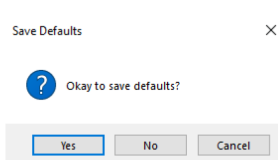
- Entry Defaults
  - Entry Defaults are available in the following places: Modify Existing Vendors (AP), Modify Existing Customers (AR), Modify Existing Business (BL), Chart of Accounts (GL), Modify Existing Inventory (MM), Modify Existing Employees (PR), Modify Existing Jobs(PA), Modify Existing Locations (UB), and Modify Existing Customers (UB). Default values can be setup so they will populate automatically when adding a new record.
    - In Modify, go to File > Defaults



    - The screen will clear unless defaults have previously been set.



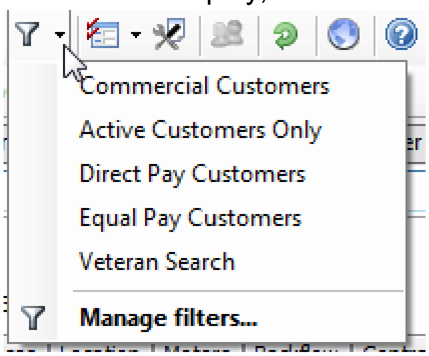
    - Enter the defaults for any field, then click save and answer Yes to save the defaults.



  - You can control entry defaults in Accounts Payable's Enter Invoices on a vendor-by-vendor basis. To change the entry defaults, follow these steps:
    - In Accounts Payable, go to Vendors | Modify Existing Vendors.
    - Navigate to the vendor you want to change.
    - Click on the Entry Defaults tab.

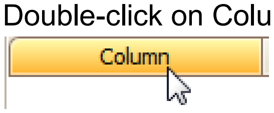
- Can set the defaults for Item description, GL account, Department, Terms, Shipping address, Sales tax rate, and Description history.

- Inquiry Filters
  - You have the ability to filter the list of vendors or customers that appear in Vendor Inquiry or Customer Inquiry. Follow this example to create a filter that only shows active customers in Customer Inquiry:
    - In Customer Inquiry, click on the down arrow next to the Filter button on the toolbar.

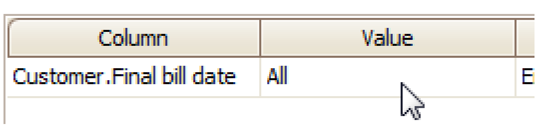


    - Click on Manage filters…
    - Click the Add a new filter button.

    - Enter a Filter name:.
    - Click the Save this filter checkbox.
    - Also, click on Set as default if you want this filter to default every time you enter Customer Inquiry.
    - Double-click on Column



    - Find Customer.Final bill date in the list. Double-click on this field to move it to the right side of the screen.
    - Click OK.
    - Double-click on All next to Customer.Final bill date.

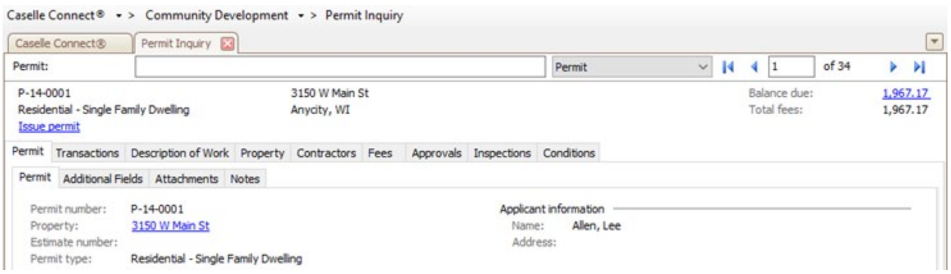


    - Click on Operators and select {is null}.
    - Click OK.
    - Click OK.

This filter is now available in the drop-down list when you click the down arrow next to the Filter button on the toolbar. You can add as many filters as you want.

Hyperlinks

Blue text indicates a hyperlink to another process



1. Account Payable
    - From Purchase Order Inquiry
        - to Vendor Inquiry using Vendor Name
        - to Invoices using the Invoice Number or
        - to Requisition Inventory using Requisition Number
    - From Requisition Inquiry
        - to Vendor Inquiry using Vendor Name
        - to Purchase Order Inquiry using Purchase Order Number

2. Animal Licenses
    - From Inquiry
        - to Cash Receipting through Account balance

3. Community Development
    - From Permit Inquiry
        - to the next step in the Permit process
            - Examples, approvals, issuing permit, inspections, completing permit
        - to Property Inquiry using Property Address
        - to Cash Receipting using Balance due
    - From Property Inquiry
        - to Cash Receipting from Balance due in Permits or Violations tab
        - to next step in the Permit process from Permits tab

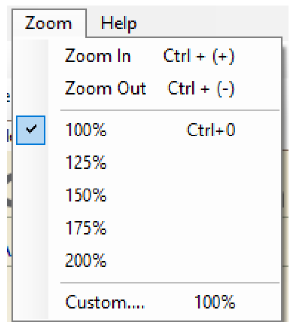
4. General Ledger
    - From Account Inquiry
        - to Journal Inquiry using the Journal Code

5. Utility Management
    - From Customer Inquiry
        - to Modify Locations from the Location Address
        - to Cash Receipting from Balance Due
        - to Email from the email address
        - to Meter Maintenance from the Meter Number in the Meter tab
    - From Service Order Inquiry
        - to Customer Inquiry from the Customer

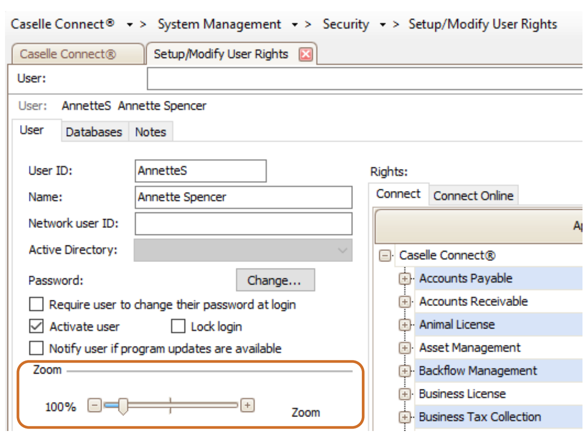
Zoom

Zoom is available throughout the system to enlarge the text within Caselle.

- To activate the zoom option, click on the zoom menu at the top and select the zoom percentage or use ctr + or ctrl – to zoom in and out.



- Zoom default can be setup in Security > Setup/Modify User Rights by user as well.



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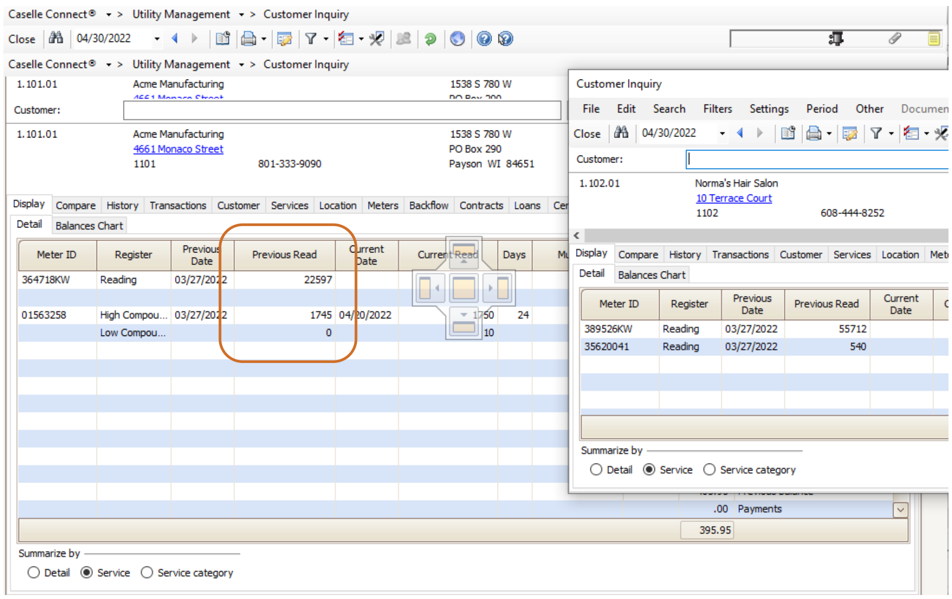
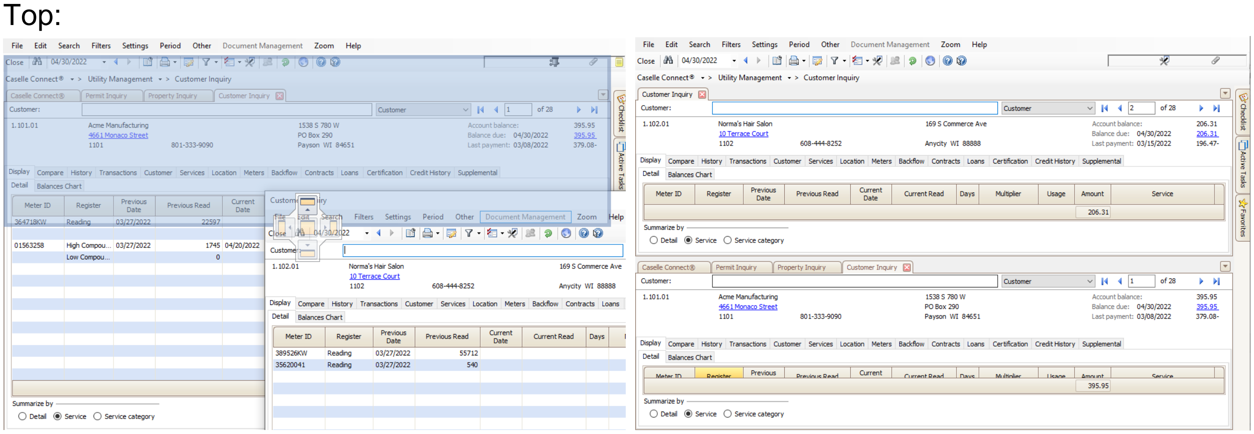
Tabs & Split Screens

Caselle screens can be split by clicking on a tab and dragging it out of the lineup.

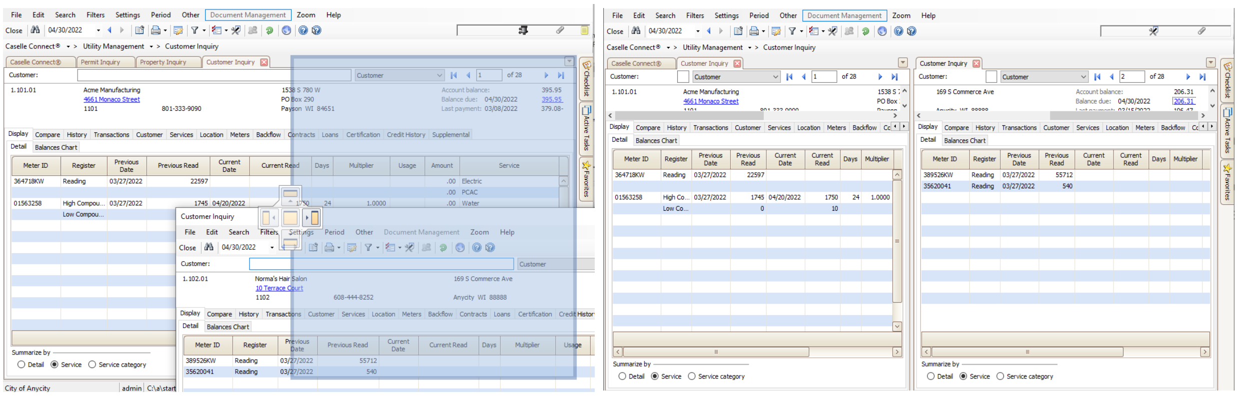


When a tab is click & dragged out of the tab lineup an icon will appear that looks like a table and benches. This allows you to pick how you want to split the screen. You can add your tab at the top, bottom left or right depending on which side you highlight.

Top:

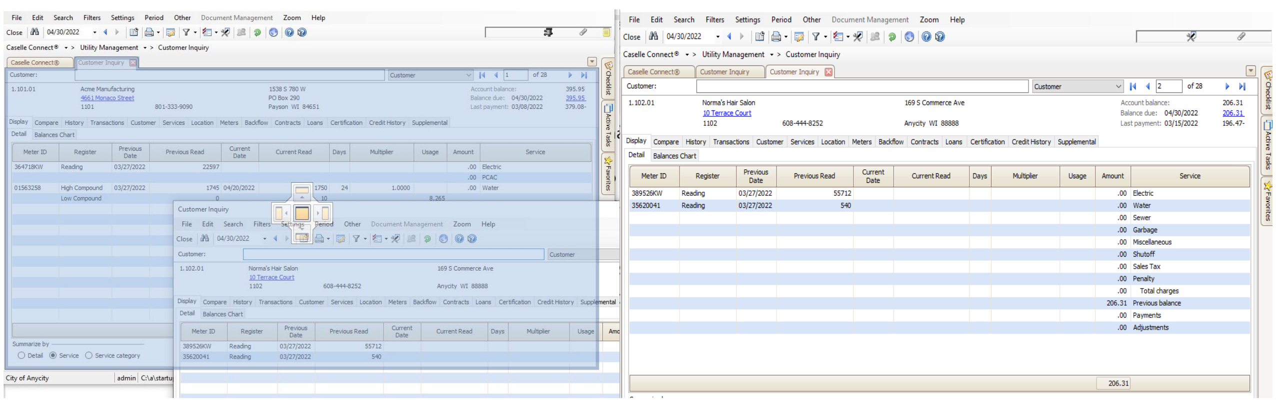


Left:

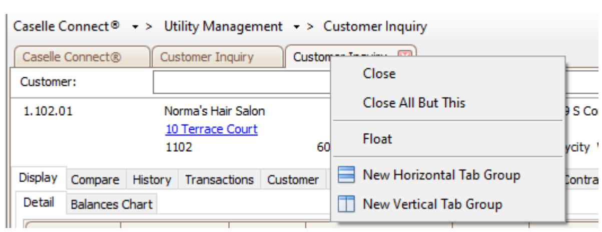


If it is dragged to the center, it will go back into the tabs at the top. You can also put it back by double clicking the header when it is a separate window.

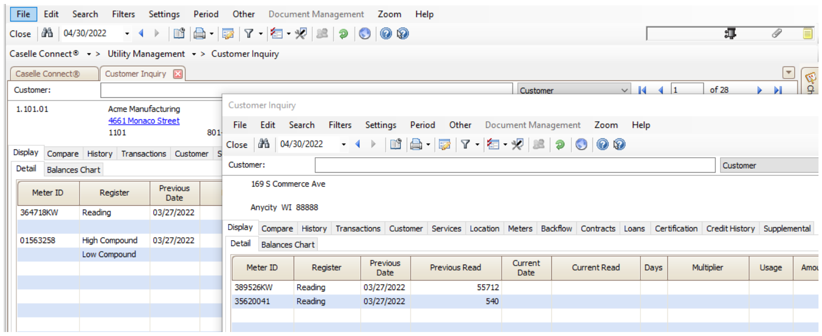
Center:



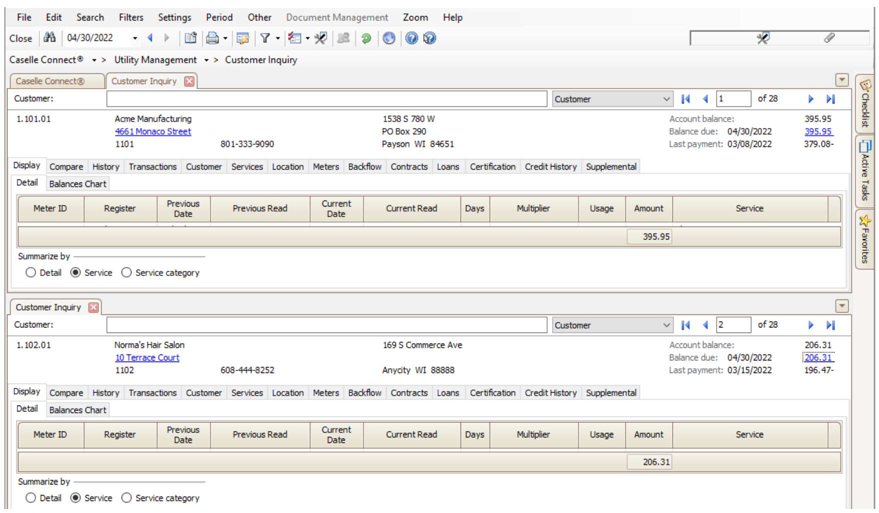
If clicking and dragging is not your thing, you can right click on the tab you want to move and have the option to “Float”, to create a “New Horizontal Tab Group” or to create a “New Vertical Tab Group”.



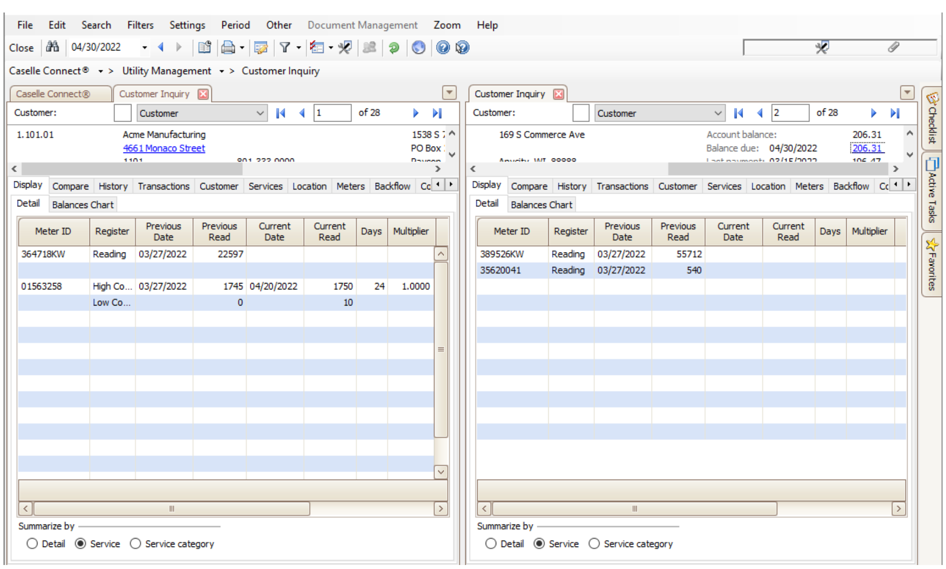
Float will bring the tab out in it's own window.



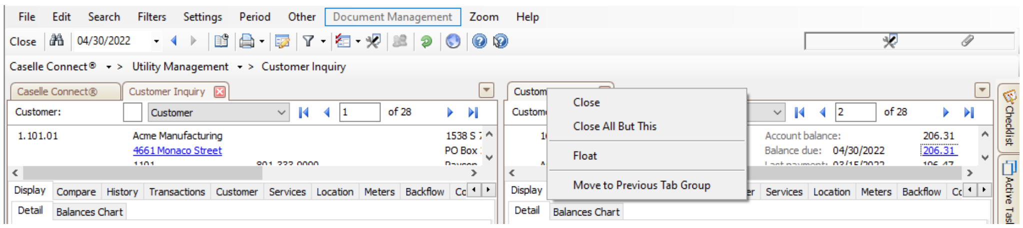
The "New Horizontal Tab Group" will put the tab at the bottom of the screen.



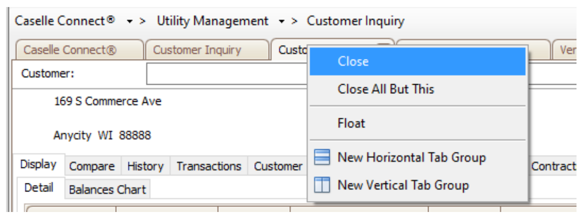
The "New Vertical Tab Group" will put the tab at the bottom of the screen.



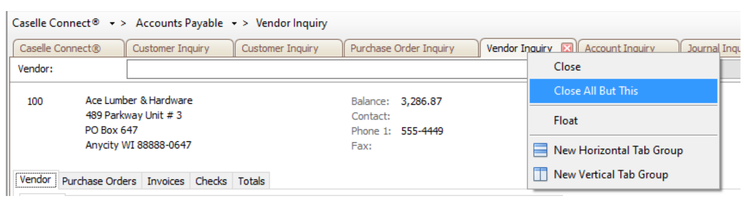
To put the tab back, right click on it and select “Move to Previous Tab Group”. Or you can click and drag it to the middle like discussed above. If you double click on it, it will float and then you will need to double click on the header a second time.



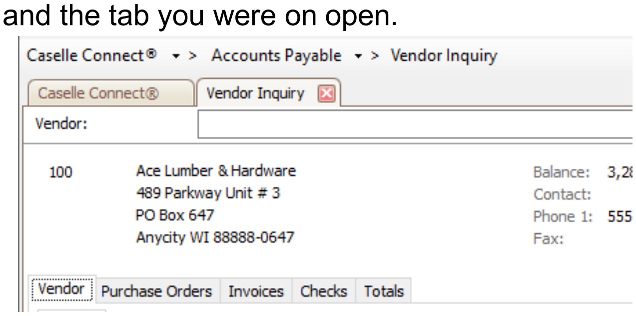
To close a tab, you can either click the on the tab or right click and select Close from the menu.



If you have several tabs open and want to close all of them, right click on the tab that you want to remain open and select “Close All But This”



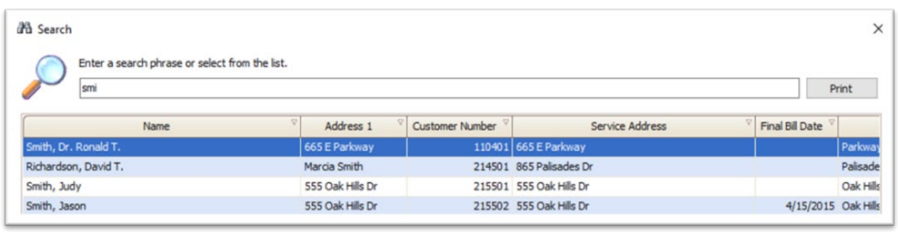
It will keep the menu tab and the tab you were on open.

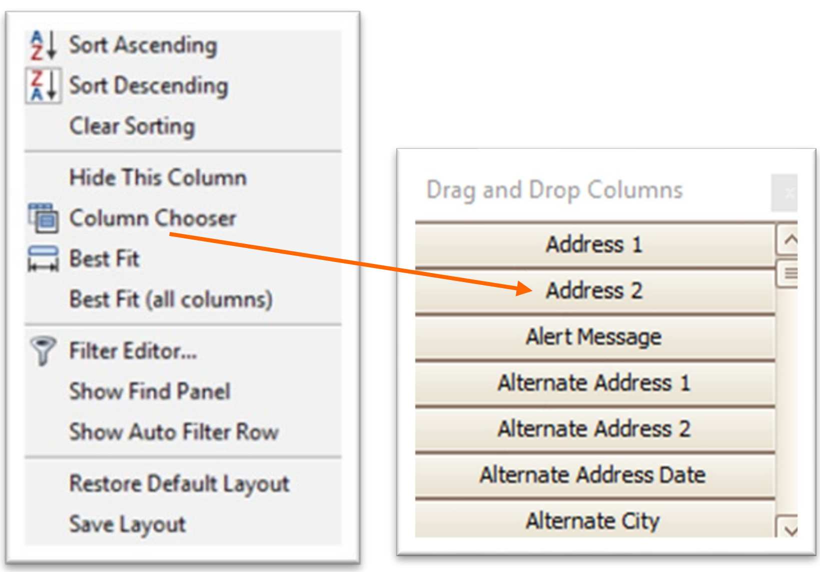


Search Screens

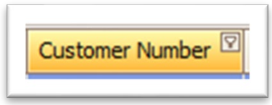
In any inquiry or modify screen, the advanced search can be accessed by clicking on the or pressing F9.

- Type in the search bar, it searches on all fields displayed
  - Just start typing the wild card is assumed
- Add additional fields
  - Right click on the header > Select Column Chooser from the menu
    - Available fields depend on the quick search that was selected.
  - Example, select Address 1 from the Column Chooser. If the utility uses the Address 1 for additional names, they can now search for the additional names.

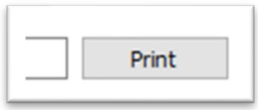


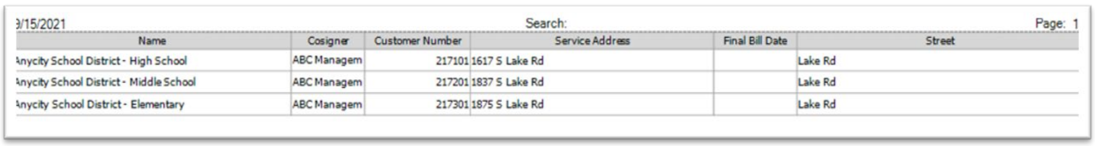


Filters can be used to refine your search as well.
Hover over the column header and click the filter icon that appears in the upper right corner.



Once the search criteria gives the results needed, the results can be printed by clicking the Print button next to the search field.

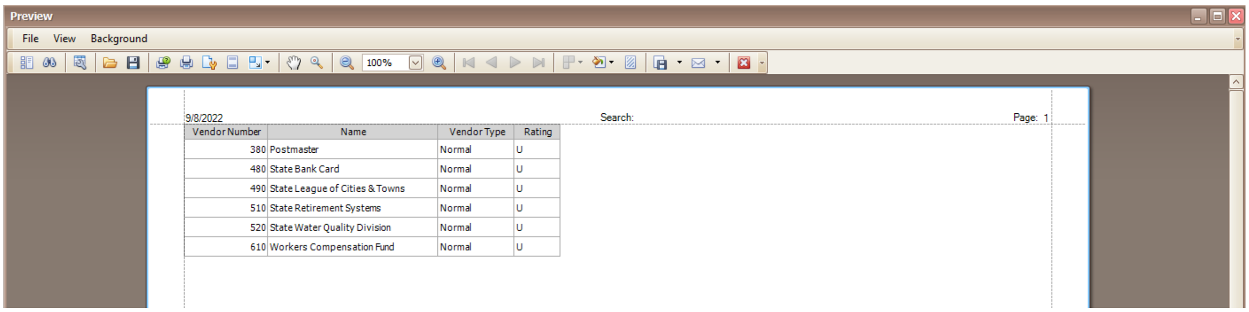



9/15/2021 Search: Page: 1

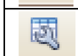
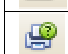
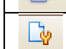
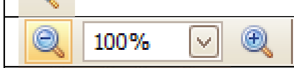
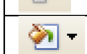
Name	Cosigner	Customer Number	Service Address	Final Bill Date	Street
Anycity School District - High School	ABC Managem	217101	1617 S Lake Rd		Lake Rd
Anycity School District - Middle School	ABC Managem	217201	1837 S Lake Rd		Lake Rd
Anycity School District - Elementary	ABC Managem	217301	1875 S Lake Rd		Lake Rd

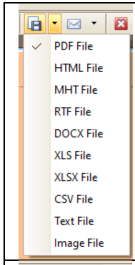
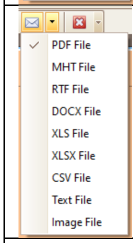
Printing/Print Preview

When you choose print from the search screens or print preview any report, the preview screen comes up.

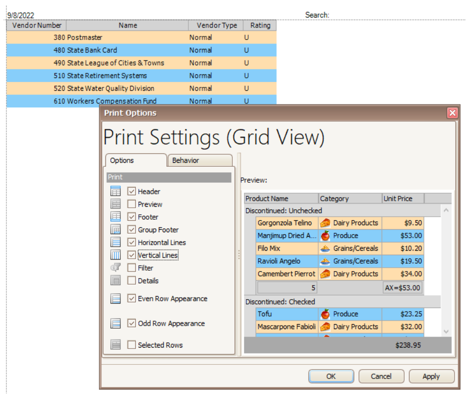


There are many things that you can do from the preview screen.

Buttons	Title	Functionality
	Thumbnails	Shows a thumbnail of each page in a panel on the left
	Search	To search the document.
	Print Options *	To change option & behavior settings for the print out.
	Open	To open saved preview files (*.prnx)
	Save As	To save a preview as a *.prnx file
	Print	To select a specific printer
	Quick Print	To print to the default printer
	Page Setup	To change paper size, orientation and margins
	Header and Footer	To modify the Header and/or Footer of the report
	Scaling	To adjust the report by percentage or pages wide
	Hand Tool	
	Magnifier	To magnify the report
	Zoom	Zoom in or out on the report
	Previous, Next, First or Last	To move around in the report a page at a time or go to the beginning or end
	Multiple Pages	To display more than one page
	Color	To add color to the background of the page
	Watermark	To add a watermark to the report (either text or a picture

	Export Document	To save the document as one of the 10 file types listed
	Send via Email	To send the document as one of the 9 file types listed
	Exit	To close the preview

*Print Options



Setup/Modify a Checklist

Use the toolbar to add a new checklist or modify an existing one. The following provides a guide to using the toolbar:

Button	Functionality
Create a New Item 1. Create a New Checklist 2. Create a New Group 3. Create a New Task	The Create a New Item button allows for the following items to be added. 1. Creates a completely new checklist. 2. Creates a new grouping within the selected checklist. 3. Creates a new task within the selected group or checklist.
Delete the Selected Item 1. Delete the Selected Checklist 2. Delete the Selected Group 3. Delete the Selected Task	The Delete the Selected Item button allows for the following items to be removed. 1. Deletes the selected checklist and all items within it. 2. Deletes the selected grouping and all items within it. 3. Deletes the selected task.
Copy the Selected Item	The Copy the Selected Item allows for a task, group or even entire checklist to be copied. The new item will have the same name with the pretext “Copy of”.
Add the Selected Checklist to My View List	This button allows you to add multiple checklists to your checklist selection box. When you have multiple checklists you can navigate between any that have been included in your view list.
Remove the Selected Checklist from My View List	This button allows you to remove a checklist from your view list. If the checklist is being used by another user or you do not want to delete it, this option is useful to remove additional checklist from your view list.

Set the Selected Checklist as My Default	This button allows you to select which of your checklist you would like to be defaulted into your view list selection and therefore viewable when you open your checklist. The checklist on the right will have a checkmark on the clipboard icon when it is designated as the default. If the checklist selected to be a default is not included in your view list it will be added.

Button	Functionality
Move the Selected Group (or Task) Up/Down	These buttons allow you to move a selected group or task within a particular checklist. The grid to the right will help you keep track of where the item has been saved.
Export the Selected Checklist	This button allows you to export a checklist. You can export checklists to save them as a backup or share them with other Caselle users outside your organization.
Import a Checklist	This button allows you to import a saved checklist. Import a checklist that has been backed up or created by a user from another organization.

Groups

Tasks on a checklist should be grouped according to the frequency that they should be completed. Use the Group section to determine the frequency for the tasks included within the group. Create a frequency that is daily, weekly, monthly, yearly, or on a special date such as a check issue or period end date.

Tasks

Use the Task section to describe a task or setup an action that should occur when clicking on the task.

- The description should give a clear direction of what the task is. For additional information, the notes section can be filled out.
- Designate if the task is required or not. All required task within a group must be completed before the group will proceed to the next due date.
- Designate if click on the task will open a routine within Clarity, launch another program, or just be for information only.**Checklist – Sharing**

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Need for a group of users to share a checklist or just want to pass the responsibilities onto someone else? Use the Share with All Users button to designate who can see what checklists and if they can edit them.

- Unselect the Share this Checklist with All Users checkbox to designate specific users
- Use the grid of users to designate which users will share the checklist and which will have the ability to modify
- If you are sharing the checklist with all users, you can also select to allow all users to be able to modify it

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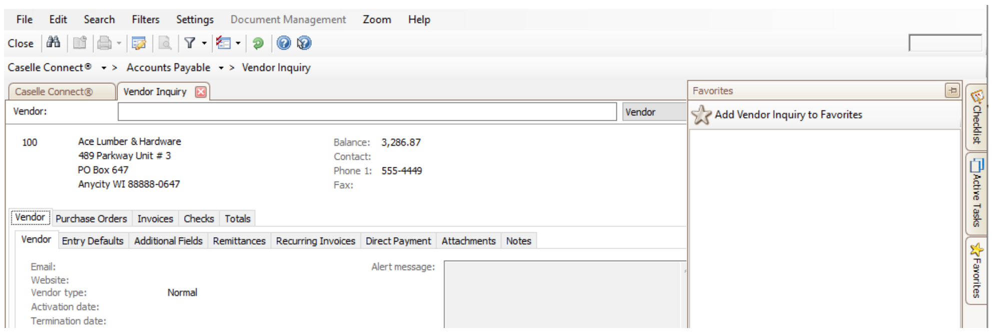
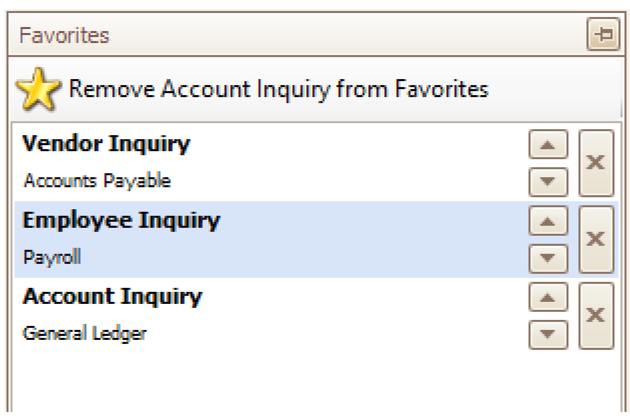
Favorites

Favorite can be used like bookmarks in internet browsers. When you are on a tab that you want to have a shortcut for, hover over the Favorites tab and click the star Add to add.



As you add to Favorites, the list of shortcuts will grow:

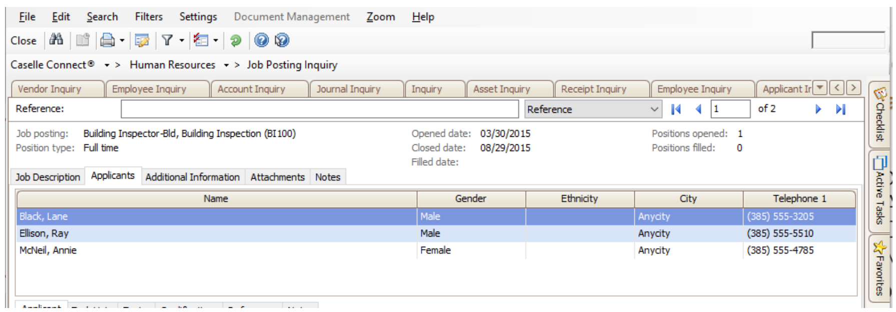


You can use the up and down arrow keys to put your favorite in the order you prefer.
You can remove shortcut from your Favorites by clicking the Star for the tab you are on or clicking the X.

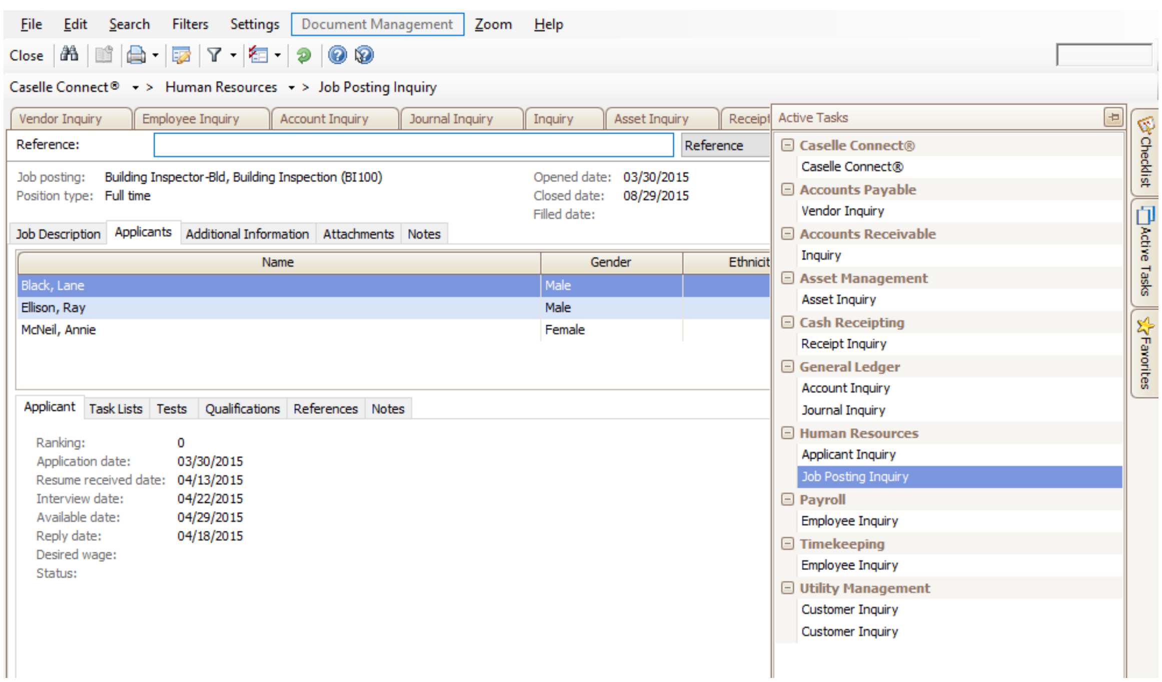
Active Tasks

The third tab on the right is the Active Tasks. If you like to keep all the tabs you use during the day open, Active Tasks will allow you to go to any tab whether they are showing on the top or not.

If you have more tabs open than will fit in the window, arrow keys will appear on the right side.



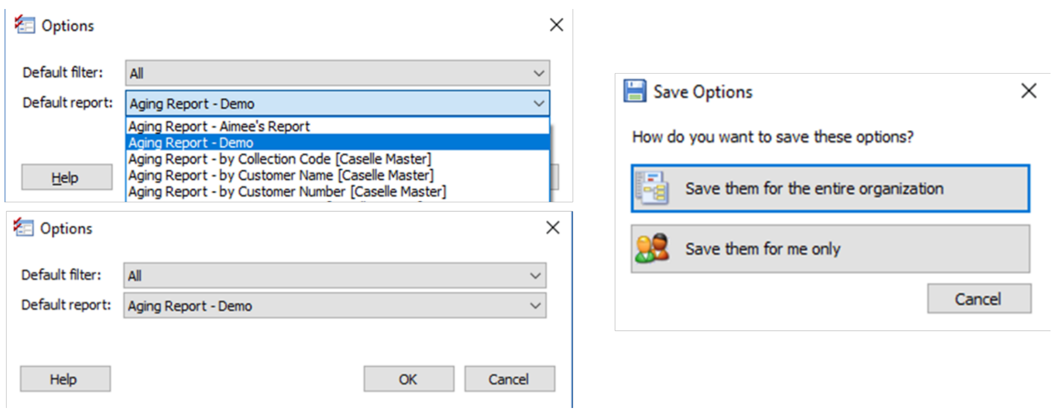
These can be used to move through the tabs, but using Active Tasks will help you find the task you want quicker.



Reports

Default Reports:

The report that is used most often can be set as the default report. In the new style reports click the options icon and select the report from the Default report dropdown list. Click OK and click Save for the entire organization.

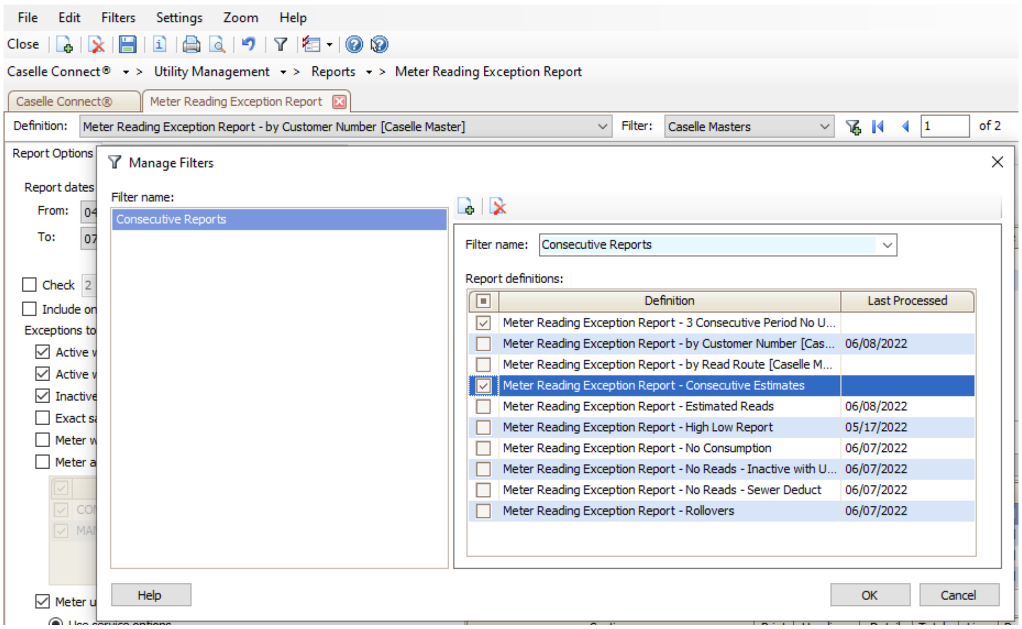


For the old style reports, have the report displayed in the Title box and check the box Default report:

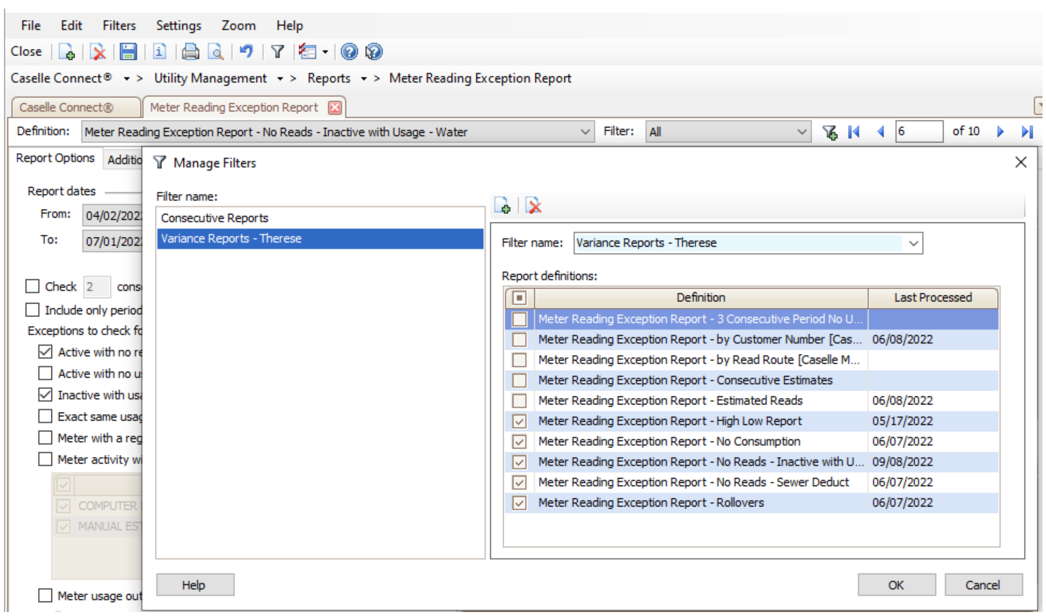
Report Filters & Default Filters:

As your utility gets more and more reports setup, you may want to create a filter to filter out the specific reports that you use for report.

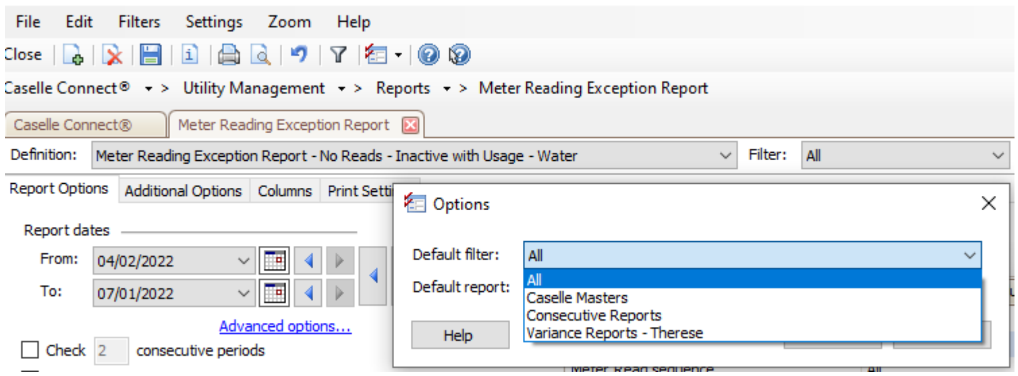
To setup a filter, click on the filter icon and Manage Filters will open:

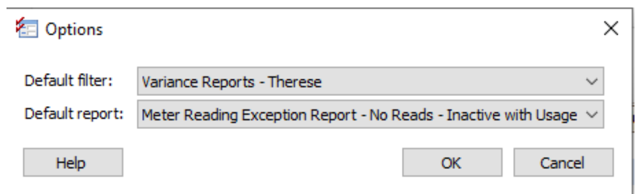


Enter the name of the filter and check the boxes before the reports you want to see. You can filter by type of report or use your name to identify they are the reports you use.

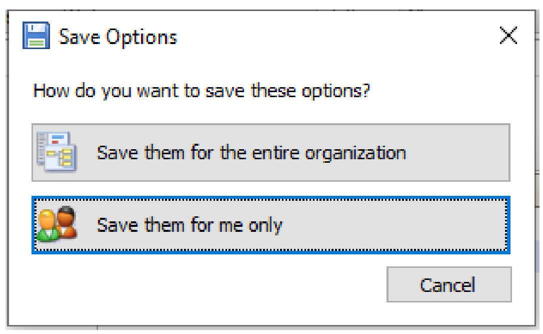


Once you have filters setup, you can setup a default filter by clicking on Options and selecting the filter you want to use.





This is one of the rare times we recommend that you “Save them for me only”



Drill Down Capability

The new style reports have drill down capability if the reports are previewed. If the report lists customers, click on the customer number or name to go to Customer Inquiry. If the report is made up of different totals, clicking on a total will bring up a second report to show what customers made up that total.

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Anycity Corporation

Transaction Summary -
Dates: 04/01/2020 - 04/30/2020

Page: 1
Sep 14, 2020 11:30AM

Report Criteria:

Selected types: Billing, Billing Adjustment, Contract Adjustment, Contract Billing, Deposit Applied, Interest Applied, Payment, Payment Adjustment, Reallocation, Transfer, Write Off
Suppressing rows with no transactions
Summarized by calendar day

Date	Billing	Billing Adjustment	Contract Adjustment	Contract Billing	Deposit Applied	Interest Applied	Payment	Payment Adjustment	Reallocation	Transfer	Write Off	Balance
03/31/2020												3,068.29
04/02/2020	42.55	-	-	-	100.00-	8.33-	-	-	-	-	-	3,002.51
04/03/2020	-	-	-	-	-	-	191.61-	-	-	-	-	2,810.90
04/15/2020	40.00	-	-	-	-	-	-	-	-	-	-	2,850.90
04/20/2020	-	-	-	-	-	-	-	100.46	-	-	-	2,951.36
04/29/2020	-	30.00-	-	-	-	-	-	-	-	-	-	2,921.36
04/30/2020	59.30	-	-	-	-	-	34.46-	-	-	-	-	2,946.20
Grand Totals:	141.85	30.00-	-	-	100.00-	8.33-	226.07-	100.46	-	-	-	2,946.20

Anycity Corporation

Transaction Register - SYSTEM STATUS REPORT DAILY
Dates: 04/15/2020 - 04/15/2020

Page: 1
Sep 14, 2020 11:39AM

Report Criteria:
Selected types: Billing

Billing

04/15/2020

Name	Customer Number	Type	Reference Number	Description	Source ID	Check Number	Amount	Msg	Service
Allan, Cynthia	2.153.01	Billing	2	Manual Billing			15.00	M	NSF - 14
Bates, William S.	2.149.01	Billing	1				25.00	M	Misc - 13
Total 04/15/2020:	430202						40.00		
Total Billing:	430202						40.00		
Grand Totals:	430202						40.00		

Report Criteria:
Selected types: Billing

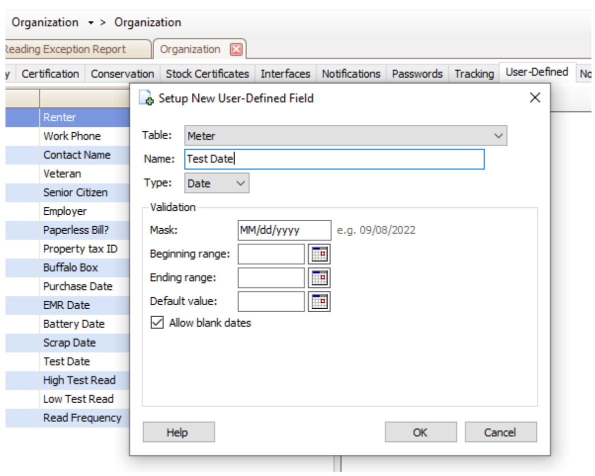
Creating User Defined Fields

User Defined Fields (UDF) can be added to any table in any application. They are used when you want to track or report on information that does not already exist in the table.

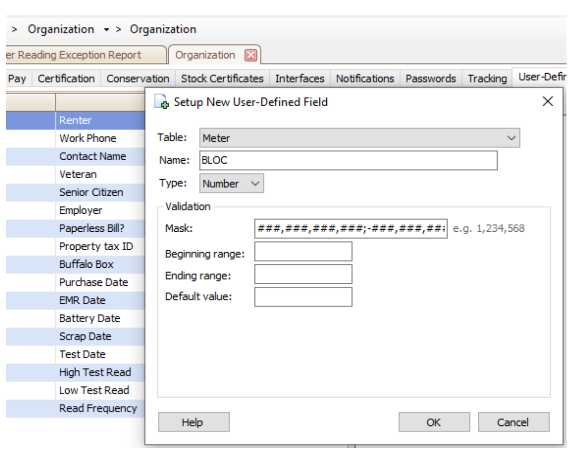
User Defined Fields are added in Organization > Organization on the User-Defined tab in all applications.

When a UDF is added

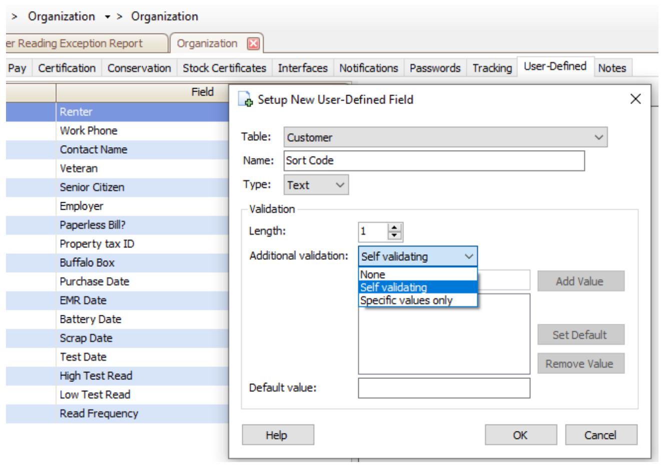
- Select the table to add the field to
- Enter the name of the field. The name must be unique and cannot be the same as an existing field in the system.
- Select the Type
    - There are 4 types of fields that can be added.
        - Date



        - Number



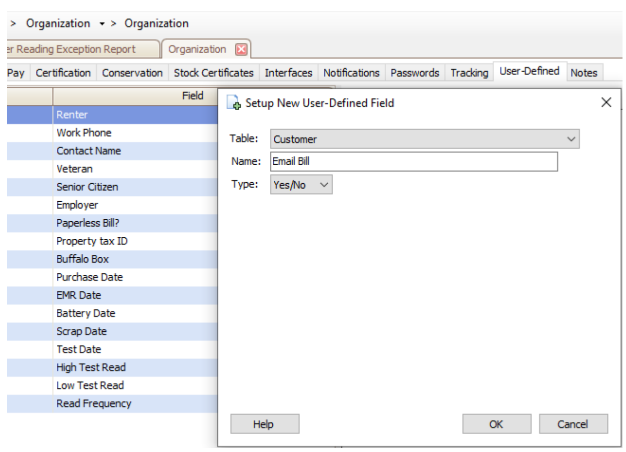
- Text



Text fields can have validation

- None means it's a free form field. You can enter anything you want.
- Self-Validating means you can enter any text you want and it will be available to pick from the list in the future.
- Specific values mean you enter the only values allowed in a pick list

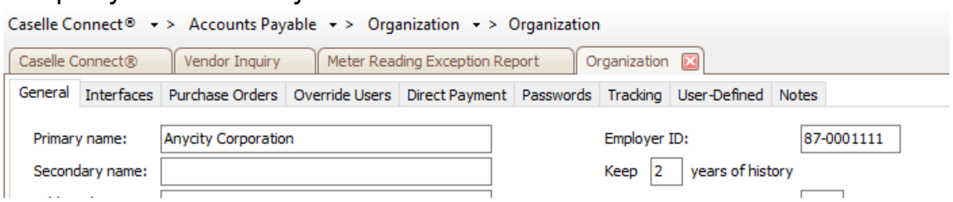
- Yes/No



Deleting History

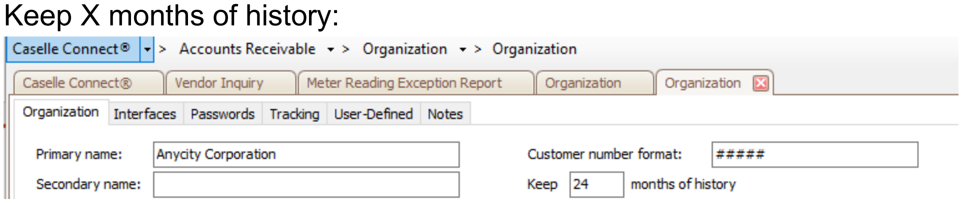
Occasionally you will want to delete history from prior to your retention period. All applications have retention period setup in Organization > Organization. Depending on the application, the retention period may be days, months or years. All history or just certain detail like payment detail or expired licenses

Keep X years of history:



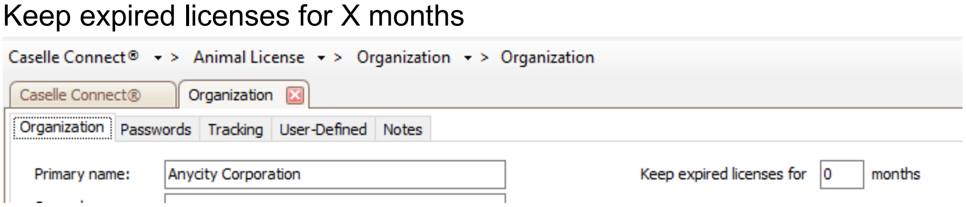
Accounts Payable
Asset Management
Business Licenses
Business Tax Collection
Human Resources – Payroll history
Materials Management
Payroll
Project Accounting
Timekeeping

Keep X months of history:



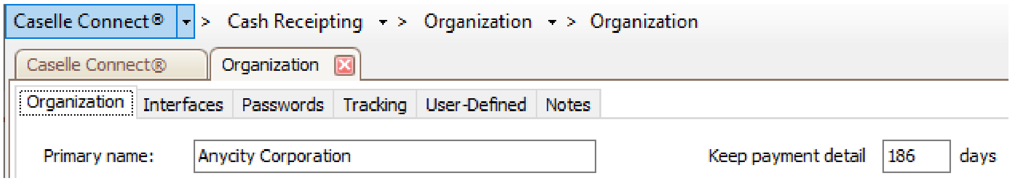
Accounts Receivable
Backflow Management

Keep expired licenses for X months



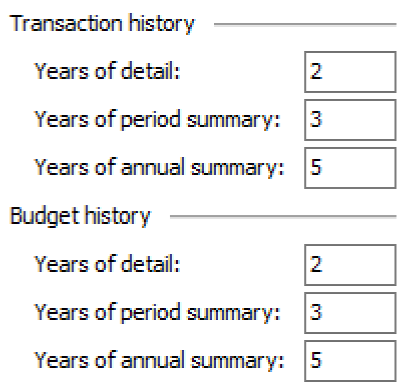
Animal License
Community Development
Maintenance Orders

Keep payment detail X days

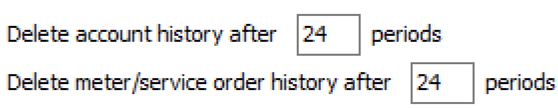


Cash Receipting
Check on Demand
Human Resources – Applicant history

General Ledger – Years of detail, period summary or annual summary



Utility Management – Keep X Periods



Deleting History tasks are commonly found in the Organization Miscellaneous Menu. Although they can be found in other menus, for example Delete Inactive Customers in Accounts Receivable and Utility Management is in the Customer Menu.

The Delete History function will use the retention period in Organization to default the date to "delete records dated on or before:" DO NOT CHANGE THIS DATE unless it is to a date prior to the date listed.

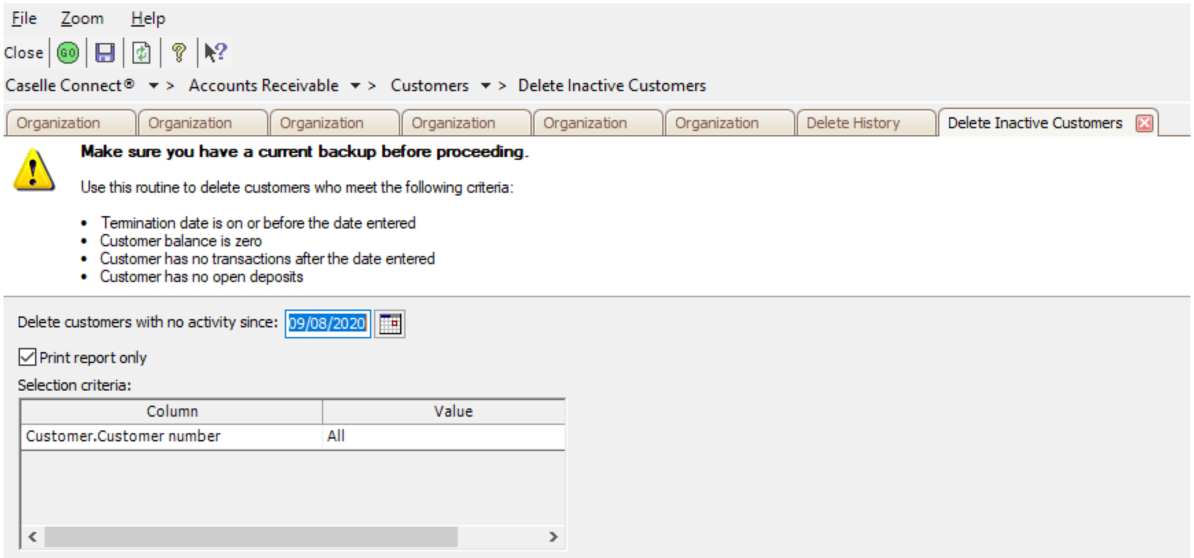
Delete history functions will also allow you to add some selection criteria to limit the history being deleted.

You can normally select Print Report Only to get a list of what will be deleted without actually deleting anything. When you want to run the Delete, uncheck that box.

Delete history functions will not allow you to delete active records.

NOTE: ALWAYS MAKE A CURRENT BACKUP BEFORE RUNNING A DELETE HISTORY PROCESS!

Example:



Need more help? Civic Support Line: 888-241-1517