PFS Plus Help

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Part I

1 Introduction

Welcome to PFS Plus, the easiest and most flexible software program available for creating personal financial statements. PFS Plus is created, maintained, and supported by Pro-Ware, LLC.

1.1 What is PFS Plus?

PFS (or, Personal Financial Statements) Plus is a great tool to aid you in preparing personal financial statements. Just enter your financial data in the pre-defined categories and PFS Plus will create professional financial statements that can be printed, emailed, or saved to disk and submitted to a bank or other financial institution. Once you enter your data in PFS Plus, your work is done. Updating the data is a snap, so you can modify any of your personal financial data when your financial position changes.

1.2 Installing PFS Plus

If you are installing PFS Plus for the first time or on another computer, simply follow the on-screen instructions in the Setup Wizard that appears when you double-click on the Setup file. Should you need to download the installation for PFS Plus, got to the Pro-Ware website: http:\\www.proware-cpa.com and click the downloads option on the menu to download the latest demo version of PFS Plus. Entering your Activation data will convert the demo version of PFS Plus to an unrestricted version of the program.

1.3 Starting PFS Plus For The First Time

If you have just installed PFS Plus for the first time, the Setup Wizard will prompt you to start the program automatically after the installation is complete. You can leave the box checked to automatically start PFS Plus, or start it by clicking the icon that appears on your desktop after the installation is complete.

1.4 Password Encryption

Since you will be entering confidential data in PFS Plus, it is recommended that you create a password to password-protect and encrypt your personal data. To enable password protection, click that option located in the File menu. Once you select this option, you will be required to enter your password twice for confirmation. Take care to create a password that you will remember because you will not be able to retrieve the data you have entered in PFS Plus should you forget your password.

1.5 Technical Support

Technical support is included free with your purchase of PFS Plus. Should you need assistance, you can contact Pro-Ware. LLC using any of the following methods:

- ***Voice (402) 861-8800 -*** Support hours are 8:30 am - 5:00 pm, CST
- ***Fax (402) 861-8653 -*** 24 hours a day
- ***Internet Web Site -*** www.proware-cpa.com or www.assetkeeper.com
- ***Email Address -*** support@proware-cpa.com

When calling for technical support, please have your serial number and the version of PFS Plus that you are using. Your serial number and version number can be found by selecting the About PFS Plus option located under the Help menu.

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Part II

2 Applicant Information

This is the starting point for data entry in PFS Plus. From this screen, you can enter your name, address, email address, phone, and other contact information. If you have a co-applicant, you can click the tab for Co-Applicant data to enter contact information for the co-applicant. In addition, you can enter Employment History, Financial Advisor Information, and details for the Entity that will receive the financial statements. Any of the applicant information can be entered or modified at a later time, if necessary.

2.1 Overview

Once you have entered your Applicant Information, it will be displayed on the Overview tab.

2.2 Applicant Details

Select this tab to enter any of the following information:

- ***Name***
- ***Date of Birth***
- ***Social Security or Tax ID Number***
- ***License or Other Identification Number***
- ***Address, City State and Zip Code***
- ***Email Address***
- ***Daytime, Evening, and Mobile Phone Numbers***
- ***Fax Number***
- ***Tax Rate***

Once finished, your data will be automatically saved.

2.3 Co-Applicant Details

Select this tab to enter any of the following information for you co-applicant:

- ***Name***
- ***Date of Birth***
- ***Social Security or Tax ID Number***
- ***License or Other Identification Number***
- ***Address, City State and Zip Code (Click the checkbox to use the same information for the address that you entered for the applicant)***
- ***Email Address***
- ***Daytime, Evening, and Mobile Phone Numbers***
- ***Fax Number***

Once finished, your data will be automatically saved.

2.4 Employment

This tab allows you to enter employment information. To add an employer, click the "+" button in the lower left of the window.

Enter any of the following employment information:

- ***Employee (Specifies whether this employment information pertains to the applicant or the co-applicant)***
- ***Start and End Dates of Employment***
- ***Position***
- ***Employer Name***
- ***Contact Name***
- ***Address, City, State, Zip Code***
- ***Phone and Fax***
- ***Email Address***
- ***Employer's Website***

Click "Save" to save the information when finished.

To delete an entry made to your employment data, highlight the entry and click the "-" (minus) button in the lower left.

To edit an entry, highlight the entry, click the cogwheel in the lower left of the window and select Edit... from the drop-down list.

There is also a "Duplicate" option on the drop-down list that will duplicate the previous employer information entered. From there, you can modify the data as needed for the employment information.

2.5 Advisors

This tab allows you to enter financial advisor information. To add an advisor, click the "+" button in the lower left of the window.

Enter any of the following information:

- ***Advisor Of (Specifies whether this advisor information pertains to the applicant or the co-applicant)***
- ***Advisement Role***
- ***Advisor Name***
- ***Company Name***

- ***Address, City, State, Zip Code***
- ***Phone and Fax***
- ***Email Address***
- ***Advisor's Website***

Click "Save" to save the information when finished.

To delete an entry made for your financial advisors, highlight the entry and click the "-" (minus) button in the lower left.

To edit an entry, highlight the entry, click the cogwheel in the lower left of the window and select Edit... from the drop-down list.

There is also a "Duplicate" option on the drop-down list that will duplicate the previous advisor information entered. From there, you can modify the data as needed for the advisor information.

2.6 Prepared For

This tab allows you to enter information pertaining to the institution that this data is being prepared for. To add an institution, click the "+" button in the lower left of the window.

Enter any of the following information:

- ***Institution Name***
- ***Contact Name***
- ***Address, City, State, Zip Code***
- ***Phone and Fax***
- ***Email Address***
- ***Institution's Website***

Click "Save" to save the information when finished.

To delete an entry made to your "Prepared For" data, highlight the entry and click the "-" (minus) button in the lower left.

To edit an entry, highlight the entry, click the cogwheel in the lower left of the window and select Edit... from the drop-down list.

There is also a "Duplicate" option on the drop-down list that will duplicate the previous information entered. From there, you can modify the data as needed.

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Part III

3 Assets

Click Assets on the toolbar to enter asset information for you and your co-applicant. When you click the Assets button for the first time, you will see a blank window where you can add any assets. To start, click the "+" at the bottom-left of the window.

The following types of assets can be entered in PFS Plus:

- ***Cash***
- ***Receivables***
- ***Marketable Securities***
- ***Partnership Interests***
- ***Cash Value of Life Insurance Policies***
- ***Retirement Accounts***
- ***Vehicles***
- ***Personal Property***
- ***Primary Residence***
- ***Other Real Property***
- ***Other Assets***

3.1 Adding Assets

To add an asset, click the "+" sign in the lower-left of the window.

3.1.1 General Information

First, select the Asset Type that you are entering data for. Select from among the following asset types:

- ***Cash***
- ***Receivables***
- ***Marketable Securities***
- ***Partnership Interests***
- ***Cash Value of Life Insurance Policies***
- ***Retirement Accounts***
- ***Vehicles***
- ***Personal Property***
- ***Primary Residence***
- ***Other Real Property***
- ***Other Assets***

After selecting the asset type, enter the description, cost, valuation method, fair market value, and valuation date.

3.1.2 Tax Information

Enter any tax information for the asset here.

3.1.3 Notes

Enter any additional notes for your asset here.

3.1.4 Related Liabilities

You can link any related liabilities for the asset on this screen. To link the asset, click the "+" sign on the lower-left of the window. A popup list of Liabilities will appear from which you can choose to link the asset to.

3.2 Deleting Assets

To delete an asset that was entered previously, click the minus button in the lower left of the window. A confirmation screen will appear that indicates that you cannot recover the asset once it is deleted. Click "Delete" to permanently remove the asset from your file.

3.3 Editing Assets

To edit an asset, click the cogwheel at the bottom left of the window and click "Edit..." The Asset Details screen appears where you can change any of the existing information previously entered for the asset. Click "Save" to save your changes or "Cancel" to quit without saving.

3.4 Duplicating Assets

From the Asset Listing screen, you can highlight any asset and duplicate the information if you have similar assets. With the asset highlighted on the screen, click the cogwheel on the lower-left of the window and then click "Duplicate". This will create a new asset with the same information as the highlighted asset that was previously entered. You will see a duplicated asset with the additional word (Copy) listed on the screen. From there you can change any of the information by double-clicking the asset, editing any of the fields and then clicking "Save" to save your changes. Click "Cancel" to close the screen without applying the changes.

3.5 Deleting All Assets

Choose this option by clicking the cogwheel at the lower-left of the window and selecting the "Delete All Assets" option. Be careful in using this option because it will delete all of the assets in the file. A confirmation screen will appear asking you if this is really what you want to do. Click "Delete All" to confirm the deletion or "Cancel" to cancel the deletion.

3.6 Sorting Assets

The default sorting option for the assets in your file is to sort by liquidity. Assets that are more liquid, such as cash and marketable securities will appear before assets such as real property or cash value of life insurance policies. This is the default setting in PFS Plus but can be changed if you like. You can customize the sorting by selecting that option from the cogwheel menu. When you select this option, a "Customize List Order" screen appears where you can move assets up or down according to how you want them sorted. Use the arrows at the bottom left of the window to move assets up or down depending on your preference. Click the "Close" button to return to the Asset Listing screen.

3.7 Printing Assets

You can elect to print just one asset by highlighting the asset on the Asset Listing screen and then selecting the option "Print Selected Asset..." from the cogwheel menu in the lower left of the screen. You can also print all of the assets by selecting the "Print Asset Listing..." option. When you select the printing options, a screen will appear that will let you customize your report. You can change the sorting, which assets to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

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Part IV

4 Liabilities

Click Liabilities on the toolbar to enter liability information for you and your co-applicant. When you click the Liabilities button for the first time, you will see a blank window where you can add any liabilities. To start, click the "+" at the bottom-left of the window.

The following types of liabilities can be entered in PFS Plus:

- ***Notes/Loans Payable***
- ***Income Taxes***
- ***Mortgages Payable***
- ***Contingent Liabilities***
- ***Other Liabilities***

4.1 Adding Liabilities

To add a liability, click the "+" sign in the lower-left of the window.

4.1.1 General Information

First, select the Liability Type that you are entering data for. Select from among the following liability types:

- ***Notes/Loans Payable***
- ***Income Taxes***
- ***Mortgages Payable***
- ***Contingent Liabilities***
- ***Other Liabilities***

After selecting the liability type, enter the description, amount, payoff amount, interest rate, remaining payments, and monthly payment.

4.1.2 Notes

Enter any additional notes for your liability here.

4.1.3 Related Assets

You can link any related assets for the liability on this screen. To link the liability, click the "+" sign on the lower-left of the window. A popup list of Assets will appear from which you can choose to link the liability to.

4.2 Deleting Liabilities

To delete a liability that was entered previously, click the minus button in the lower left of the window. A confirmation screen will appear that indicates that you cannot recover the liability once it is deleted. Click "Delete" to permanently remove the liability from your file.

4.3 Editing Liabilities

To edit a liability, click the cogwheel at the bottom left of the window and click "Edit..." The Liability Details screen appears where you can change any of the existing information previously entered for the liability. Click "Save" to save your changes or "Cancel" to quit without saving.

4.4 Duplicating Liabilities

From the Liability Listing screen, you can highlight any liability and duplicate the information if you have similar liabilities. With the liability highlighted on the screen, click the cogwheel on the lower-left of the window and then click "Duplicate". This will create a new liability with the same information as the highlighted liability that was previously entered. You will see a duplicated liability with the additional word (Copy) listed on the screen. From there you can change any of the information by double-clicking the liability, editing any of the fields and then clicking "Save" to save your changes. Click "Cancel" to close the screen without applying the changes.

4.5 Deleting All Liabilities

Choose this option by clicking the cogwheel at the lower-left of the window and selecting the "Delete All Liabilities" option. Be careful in using this option because it will delete all of the liabilities in the file. A confirmation screen will appear asking you if this is really what you want to do. Click "Delete All" to confirm the deletion or "Cancel" to cancel the deletion.

4.6 Sorting Liabilities

The default sorting option for the liabilities in your file is to sort by liquidity. Liabilities that are more liquid, such as loans payable will appear before liabilities such as a contingent liability. This is the default setting in PFS Plus but can be changed if you like. You can customize the sorting by selecting that option from the cogwheel menu. When you select this option, a "Customize List Order" screen appears where you can move liabilities up or down according to how you want them sorted. Use the arrows at the bottom left of the window to move liabilities up or down depending on your preference. Click the "Close" button to return to the Liability Listing screen.

4.7 Printing Liabilities

You can elect to print just one liability by highlighting the liability on the Liability Listing screen and then selecting the option "Print Selected Liability..." from the cogwheel menu in the lower left of the screen. You can also print all of the liabilities by selecting the "Print Liability Listing..." option. When you select the printing options, a screen will appear that will let you customize your report. You can change the sorting, which liabilities to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

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Part V

5 Revenues

Click Revenues on the toolbar to enter revenue information for you and your co-applicant. When you click the Revenues button for the first time, you will see a blank window where you can add any revenues. To start, click the "+" at the bottom-left of the window.

The following types of revenues can be entered in PFS Plus:

- ***Salaries/Wages***
- ***Bonuses/Commissions***
- ***Dividends***
- ***Interest Income***
- ***Rental Income***
- ***Royalties***
- ***Child Support Received***
- ***Alimony Received***
- ***Retirement Benefits***
- ***Partnership Distributions***
- ***Other Income***

5.1 Adding Revenues

To add a revenue or income item, click the "+" sign in the lower-left of the window.

5.1.1 General Information

First, select the Revenue Type that you are entering data for. Select from among the following revenue types:

- ***Salaries/Wages***
- ***Bonuses/Commissions***
- ***Dividends***
- ***Interest Income***
- ***Rental Income***
- ***Royalties***
- ***Child Support Received***
- ***Alimony Received***
- ***Retirement Benefits***
- ***Partnership Distributions***
- ***Other Income***

After selecting the revenue type, enter the description, amount, and frequency of the revenue stream.

5.1.2 Notes

Enter any additional notes for the revenue here.

5.2 Deleting Revenues

To delete a revenue amount that was entered previously, click the minus button in the lower left of the window. A confirmation screen will appear that indicates that you cannot recover the revenue item once it is deleted. Click "Delete" to permanently remove the revenue amount from your file.

5.3 Editing Revenues

To edit a revenue amount, click the cogwheel at the bottom left of the window and click "Edit..." The Revenue Details screen appears where you can change any of the existing information previously entered for the revenue item. Click "Save" to save your changes or "Cancel" to quit without saving.

5.4 Duplicating Revenues

From the Revenue Listing screen, you can highlight any revenue item and duplicate the information if you have similar revenue streams. With the revenue item highlighted on the screen, click the cogwheel on the lower-left of the window and then click "Duplicate". This will create a new revenue amount with the same information as the highlighted revenue item that was previously entered. You will see a duplicated revenue amount with the additional word (Copy) listed on the screen. From there you can change any of the information by double-clicking the revenue item, editing any of the fields and then clicking "Save" to save your changes. Click "Cancel" to close the screen without applying the changes.

5.5 Deleting All Revenues

Choose this option by clicking the cogwheel at the lower-left of the window and selecting the "Delete All Revenues" option. Be careful in using this option because it will delete all of the revenue amounts in the file. A confirmation screen will appear asking you if this is really what you want to do. Click "Delete All" to confirm the deletion or "Cancel" to cancel the deletion.

5.6 Sorting Revenues

The default sorting option for the revenues in your file is shown on the drop-down list. The default sorting for revenues in PFS Plus can be changed if you like. You can customize the sorting by selecting that option from the cogwheel menu. When you select this option, a "Customize List Order" screen appears where you can move revenue items up or down according to how you want them sorted. Use the arrows at the bottom left of the window to move revenue amounts up or down depending on your preference. Click the "Close" button to return to the Revenue Listing screen.

5.7 Printing Revenues

You can elect to print just one revenue item by highlighting it on the Revenue Listing screen and then selecting the option "Print Selected Revenue..." from the cogwheel menu in the lower left of the screen. You can also print all of the revenue items by selecting the "Print Revenue Listing..." option. When you select the printing options, a screen will appear that will let you customize your report. You can change the sorting, which revenue amounts to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

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Part VI

6 Expenses

Click Expenses on the toolbar to enter expense information for you and your co-applicant. When you click the Expenses button for the first time, you will see a blank window where you can add any expenses. To start, click the "+" at the bottom-left of the window.

The following types of expenses can be entered in PFS Plus:

- ***Installment Payments***
- ***Mortgage Payments***
- ***Rental Payments***
- ***Child Support Payments***
- ***Alimony Payments***
- ***Insurance Payments***
- ***Household Expenses***
- ***Medical/Dental Expenses***
- ***Other Expenses***

6.1 Adding Expenses

To add an expense, click the "+" sign in the lower-left of the window.

6.1.1 General Information

First, select the Expense Type that you are entering data for. Select from among the following expense types:

- ***Installment Payments***
- ***Mortgage Payments***
- ***Rental Payments***
- ***Child Support Payments***
- ***Alimony Payments***
- ***Insurance Payments***
- ***Household Expenses***
- ***Medical/Dental Expenses***
- ***Other Expenses***

After selecting the expense type, enter the description, amount, and frequency of the expense amount.

6.1.2 Notes

Enter any additional notes for the expense item here.

6.2 Deleting Expenses

To delete an expense amount that was entered previously, click the minus button in the lower left of the window. A confirmation screen will appear that indicates that you cannot recover the expense item once it is deleted. Click "Delete" to permanently remove the expense amount from your file.

6.3 Editing Expenses

To edit an expense amount, click the cogwheel at the bottom left of the window and click "Edit..." The Expense Details screen appears where you can change any of the existing information previously entered for the expense item. Click "Save" to save your changes or "Cancel" to quit without saving.

6.4 Duplicating Expenses

From the Expense Listing screen, you can highlight any expense item and duplicate the information if you have similar expenses. With the expense item highlighted on the screen, click the cogwheel on the lower-left of the window and then click "Duplicate". This will create a new expense amount with the same information as the highlighted expense item that was previously entered. You will see a duplicated expense amount with the additional word (Copy) listed on the screen. From there you can change any of the information by double-clicking the expense item, editing any of the fields and then clicking "Save" to save your changes. Click "Cancel" to close the screen without applying the changes.

6.5 Deleting All Expenses

Choose this option by clicking the cogwheel at the lower-left of the window and selecting the "Delete All Expenses" option. Be careful in using this option because it will delete all of the expense amounts in the file. A confirmation screen will appear asking you if this is really what you want to do. Click "Delete All" to confirm the deletion or "Cancel" to cancel the deletion.

6.6 Sorting Expenses

The default sorting option for the expenses in your file is shown on the drop-down list. The default sorting for expenses in PFS Plus can be changed if you like. You can customize the sorting by selecting that option from the cogwheel menu. When you select this option, a "Customize List Order" screen appears where you can move expense items up or down according to how you want them sorted. Use the arrows at the bottom left of the window to move expense amounts up or down depending on your preference. Click the "Close" button to return to the Expense Listing screen.

6.7 Printing Expenses

You can elect to print just one expense item by highlighting it on the Expense Listing screen and then selecting the option "Print Selected Expense..." from the cogwheel menu in the lower left of the screen. You can also print all of the expense items by selecting the "Print Expense Listing..." option. When you select the printing options, a screen will appear that will let you customize your report. You can change the sorting, which expense amounts to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

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Part VII

7 Reports

This option located in the toolbar will display a list of the reports you can print in PFS Plus. The following reports are available:

- ***Financial Statements***
- ***Asset Listing***
- ***Liability Listing***
- ***Revenue Listing***
- ***Expense Listing***
- ***Applicant Information***

7.1 Financial Statements

You can print complete personal financial statements by selecting the "Financial Statement" option from the Reports button on the toolbar. When you select the "Financial Statements" option, a screen will appear that will let you customize the reports that will be printed. You can change the following items for your printed financial statement:

- ***Applicant Name - You can change the name of the applicant, if necessary.***
- ***Document Title - Change the title for this statement, if necessary.***
- ***Prepared For - You can select the "Prepared For" item among the list provided or add a new item by clicking the "+" sign next to the drop-down list.***
- ***Pages to Print - Select the pages of the report you would like to print.***
- ***Signature Lines - Select the number of lines and what pages to print them on.***
- ***Layout - Choose left or center alignment for the report.***
- ***Header/Footer Options - Select the page number to start printing, whether to print the date in the header or footer, and what pages to print the footer on.***

You can also choose to restore the default settings for the financial statements by clicking the "Restore Defaults" button.

Once you have selected the settings for your report, you can click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

7.2 Asset Listing

You can print any or all of the Assets by selecting the "Asset Listing" option from the Reports button on the toolbar. When you select the "Asset Listing" report, a screen will appear that will let you customize the report. You can change the sorting, which assets to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

7.3 Liability Listing

You can print any or all of the Liabilities by selecting the "Liability Listing" from the Reports button on the toolbar. When you select the "Liability Listing", a screen will appear that will let you customize your report. You can change the sorting, which liabilities to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

7.4 Revenue Listing

You can print any or all of the Revenue items by selecting the "Revenue Listing" from the Reports button on the toolbar. When you select the "Revenue Listing" report to print, a screen will appear that will let you customize your report. You can change the sorting, which revenue amounts to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

7.5 Expense Listing

You can print any or all of the Expense items by selecting the "Expense Listing" from the Reports button from the toolbar. When you select the "Expense Listing" report, a screen will appear that will let you customize your report. You can change the sorting, which expense amounts to include, the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

7.6 Applicant Information

You can print the Applicant and Co-Applicant information by selecting the "Applicant Information" option from the Reports button on the toolbar. When you select the "Applicant Information" report, a screen will appear that will let you customize the report. You can change many of the options for the report including which information to include. In addition, you can change the format of the report, the layout, and many other aspects of the report that will be printed. Click the "Preview" button to preview the report on-screen or "Print" to print the report without previewing it.

In addition, you can also choose to save the report to disk as a .pdf file. This can be handy if you are emailing the report or need to view it on a computer that does not have PFS Plus installed. You can select the name of the file and the location on your computer where you want it saved.

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Part VIII

8 PFS Plus Options

You can change your preferences for PFS Plus by selecting the "Options..." item located at the bottom of the "Edit" menu.

By selecting the "Options..." you can change the following:

- ***General Options - Select whether you want the PFS Plus splash screen to display when starting the program.***
- ***Folder Options - Change the location of your data folder.***
- ***Message Options - Restore any messages previously displayed that have a "Do not show again" option.***
- ***Update Options - Change the frequency of how often PFS Plus checks for updates.***

8.1 Options

You can change your preferences for PFS Plus by selecting the "Options..." item located at the bottom of the "Edit" menu.

By selecting the "Options..." you can change the following:

- ***General Options - Select whether you want the PFS Plus splash screen to display when starting the program.***
- ***Folder Options - Change the location of your data folder.***
- ***Message Options - Restore any messages previously displayed that have a "Do not show again" option.***
- ***Update Options - Change the frequency of how often PFS Plus checks for updates.***

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Part IX

9 Help Menu

The Help menu has the following options available:

- ***PFS Plus Help***
- ***Feedback...***
- ***Activation...***
- ***Registration...***
- ***Check for Updates***
- ***About PFS Plus***

9.1 PFS Plus Help

Choosing this option displays the Help for PFS Plus. You can choose any of the items located in the table of contents to browse or print.

9.2 Feedback...

This option will display a screen that you can fill out and submit to Pro-Ware, LLC. You can provide feedback for enhancements that you would like to see, general questions that you would like to submit to our technical support staff for review, or problems you may have encountered while using PFS Plus. Clicking "Send" will email the submission form directly to Pro-Ware's support staff.

9.3 Activation...

If you are running the demo version of PFS Plus, you can choose this option once you purchase the software. You will be able to enter the activation information that was sent to you by Pro-Ware, LLC. Once complete, the software will stop running in the demo mode and you will be able to use beyond the 30-day limit.

9.4 Registration...

Choose this option to enter your registration information for submission to Pro-Ware. If any of your registration information has changed, you can enter the changes here and they will be submitted to our office so that we can update your registration in our user database. Changes may take up to 72 hours to be posted to your account.

9.5 Check for Updates

Select this option at any time to check for updates to PFS Plus. This option can be selected at any time and is entirely independent of the automatic update checking that PFS Plus makes according to your PFS Plus Options located under the Edit menu.

9.6 About PFS Plus

This screen will display information about the version and date of the PFS Plus release that you are currently running. In addition, you can display system information by selecting the "System Information" button.

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