



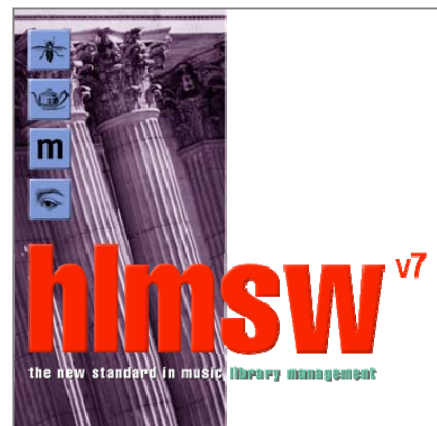
HLMSW v7 Overview

Preamble

HLMSW v7 has a number of new features including:

- Vista/Window 7 Compatibility
- New MSI-based installer
- New Reporting Controls
- New PDF Creation options
- Keyboard-based option selection when saving
- Invoice Line Discounts

It is important to note that this version is NOT compatible with previous versions of HLMSW.



Vista/Window 7 Compatibility

HLMSW v7 has been tested on both 32-bit and 64-bit versions of Windows Vista and Window 7.

New MSI-based installer

Note: It is important that BEFORE installing the new version of HLMSW, you should uninstall the old version of HLMSW AND the HLMSW AutoUpdater (which is no longer required).

New installations and updates now use the one program **HLMSWv7Setup.msi** for all maintenance operations. This file is located on your Company's shared HLMSW Update folder.

BTM Innovation Pty Ltd

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Please note NEW Address

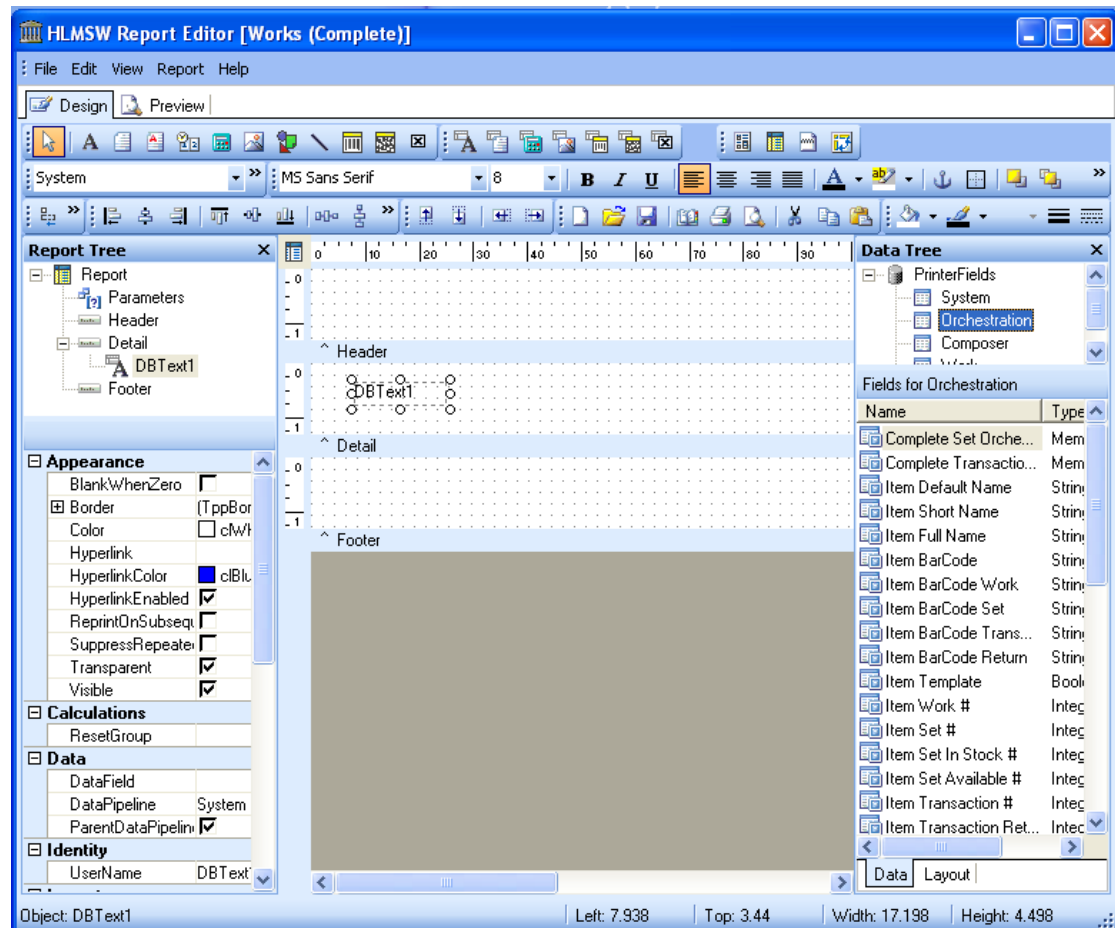
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New Reporting Controls

Note: It is recommended that you run the Edit Layout option on ALL Forms after installing this update to permanently upgrade them to the new version

A new version of the Report Builder software has been provided which has a number of new features which include:

New Look Interface



- Enhanced multi-selection options (to change similar item settings at the same time)
- Design Guides to quickly align and size objects
- "Edit in Place" support for Labels and Memos
- Groups: more control options
- Hyperlink property (viewer and PDF supports url and email addresses)
- Diagonal Lines
- Image and Barcode Alignment
- Text formatting with Ellipsis (when the complete text cannot be displayed)

New Barcode Options

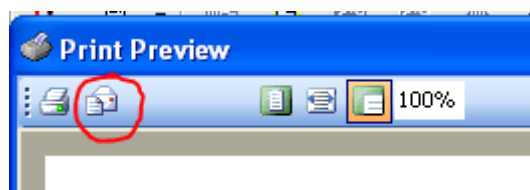
Support for 2D Barcodes (PDF417 and MaxiCode) and USPS Intelligent Barcode

New and Improved Output Options

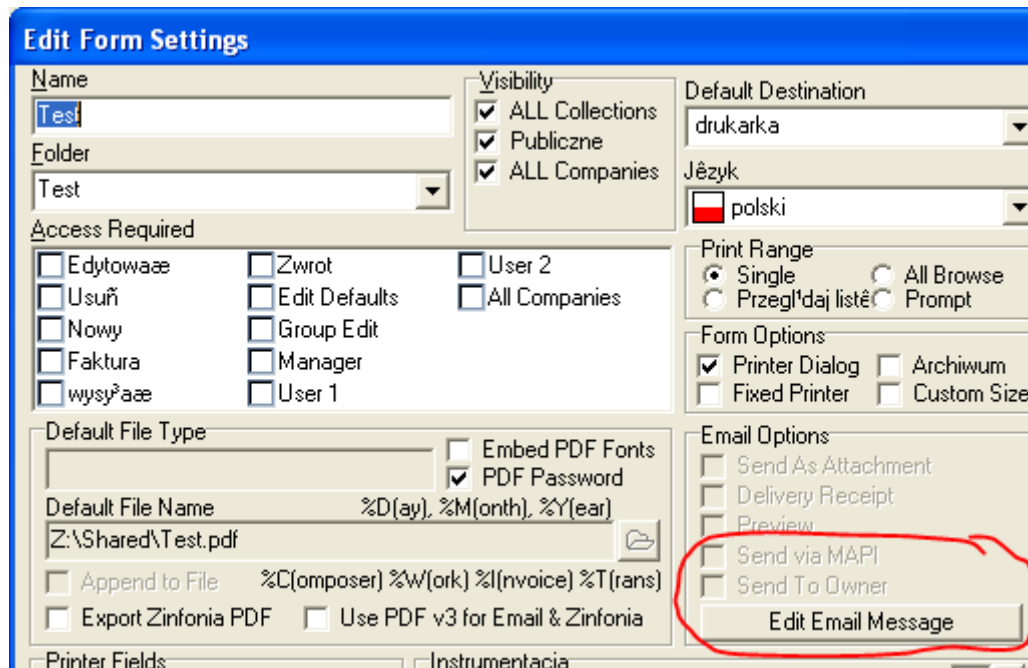
- Improved **PDF** options (see below)
- New **Word** (DOC) format
- Improved **Excel Report** (XLS)
- New **Excel Data** (XLS) format: perfect to extract JUST data elements into a XLS file
- Improved **Bitmap** (BMP) format
- Improved **JPEG** format
- Improved **Rich Text** (RTF) format

Built-in Email in Preview

Now when previewing any form you can email directly using the Email button.



You can also edit the default text used when sending the email with the Edit Email Message button in the Edit form settings dialog.



New PDF Creation options

The PDF creation process has been improved to allow:

- Select either v3 and v4 version PDFs
- Embedding of Fonts
- PDF Encryption
- PDF Testing

Note: In a later version of HLMSW, it will be possible to upload copies of selected forms into the Zinfonia system for your customers to retrieve at their leisure. Only reports with a Zinfonia Transaction ID and the *Export Zinfonia PDF* option checked will be created and exported automatically.

Select either v3 and v4 version PDFs

You can select either PDF version 3 or PDF version 4 for all reports. Both versions are widely used, but v4 PDF files are generally smaller and of better quality. Use of the *Use PDF v3 for Email & Zinfonia* checkbox will force the system to create v3 PDFs when emailing from the preview screen or when exporting to Zinfonia (this option is not yet implemented).

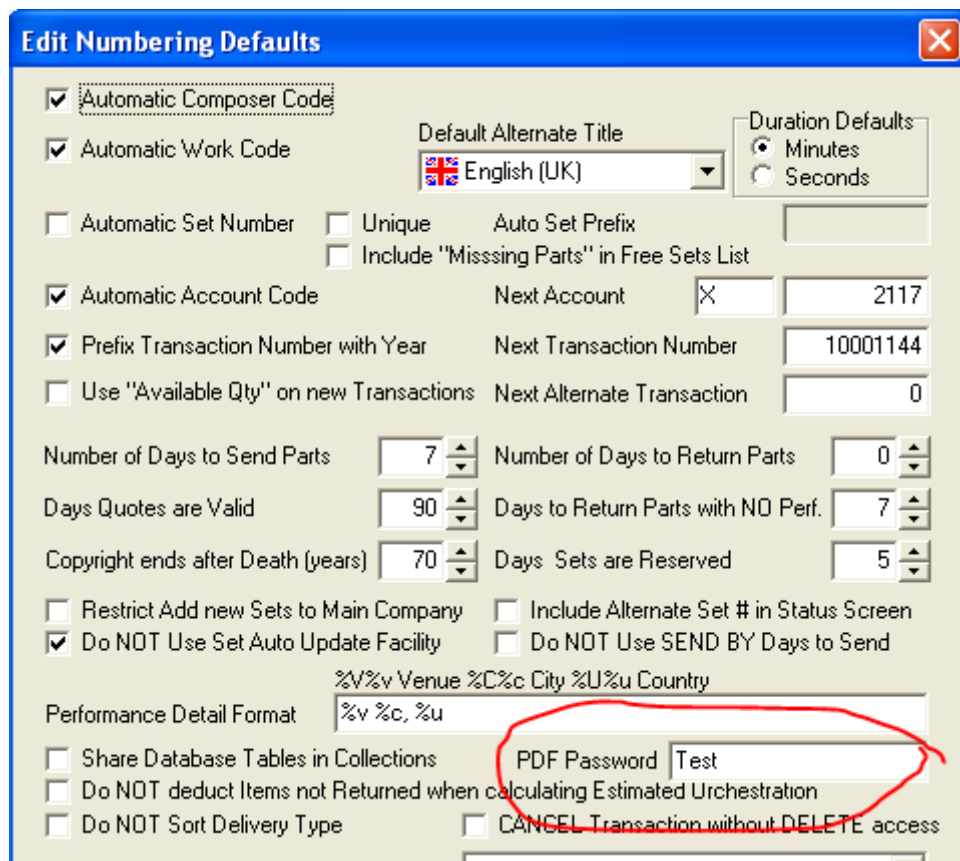
Embedding Fonts

When PDFs are created, you have the option of including in the PDF file all of the fonts used to create the document. This option should only be selected when non-standard fonts (especially for logos) are used.

Note: Font embedding will dramatically increase the size of your PDFs and so wherever possible, I recommend that you only use standard fonts in your PDFs (such as Times New Roman, Arial) and use images to display logos and other information in a company format.

PDF Encryption

You can now encrypt PDFs to remove the possibility of them being edited AFTER they have been created without a password. By default the password is the same as your database username, but you can set your own password in the Edit Numbering Defaults option in the Configuration Editor (System Defaults).



The screenshot shows the 'Edit Numbering Defaults' dialog box with the following settings:

- Automatic Composer Code
- Automatic Work Code
- Default Alternate Title: English (UK)
- Duration Defaults: Minutes, Seconds
- Automatic Set Number
- Unique Auto Set Prefix
- Include "Missing Parts" in Free Sets List
- Automatic Account Code
- Next Account: 2117
- Prefix Transaction Number with Year
- Next Transaction Number: 10001144
- Use "Available Qty" on new Transactions
- Next Alternate Transaction: 0
- Number of Days to Send Parts: 7
- Number of Days to Return Parts: 0
- Days Quotes are Valid: 90
- Days to Return Parts with NO Perf.: 7
- Copyright ends after Death (years): 70
- Days Sets are Reserved: 5
- Restrict Add new Sets to Main Company
- Include Alternate Set # in Status Screen
- Do NOT Use Set Auto Update Facility
- Do NOT Use SEND BY Days to Send
- Performance Detail Format: %V%v Venue %C%c City %U%u Country
- PDF Password: Test (highlighted with a red circle)
- Share Database Tables in Collections
- Do NOT deduct Items not Returned when calculating Estimated Urchestration
- Do NOT Sort Delivery Type
- CANCEL Transaction without DELETE access

PDF Testing

The new button **PDF Test** allows you to create sample PDFs in all of the available formats to see which options are best suited to your system.

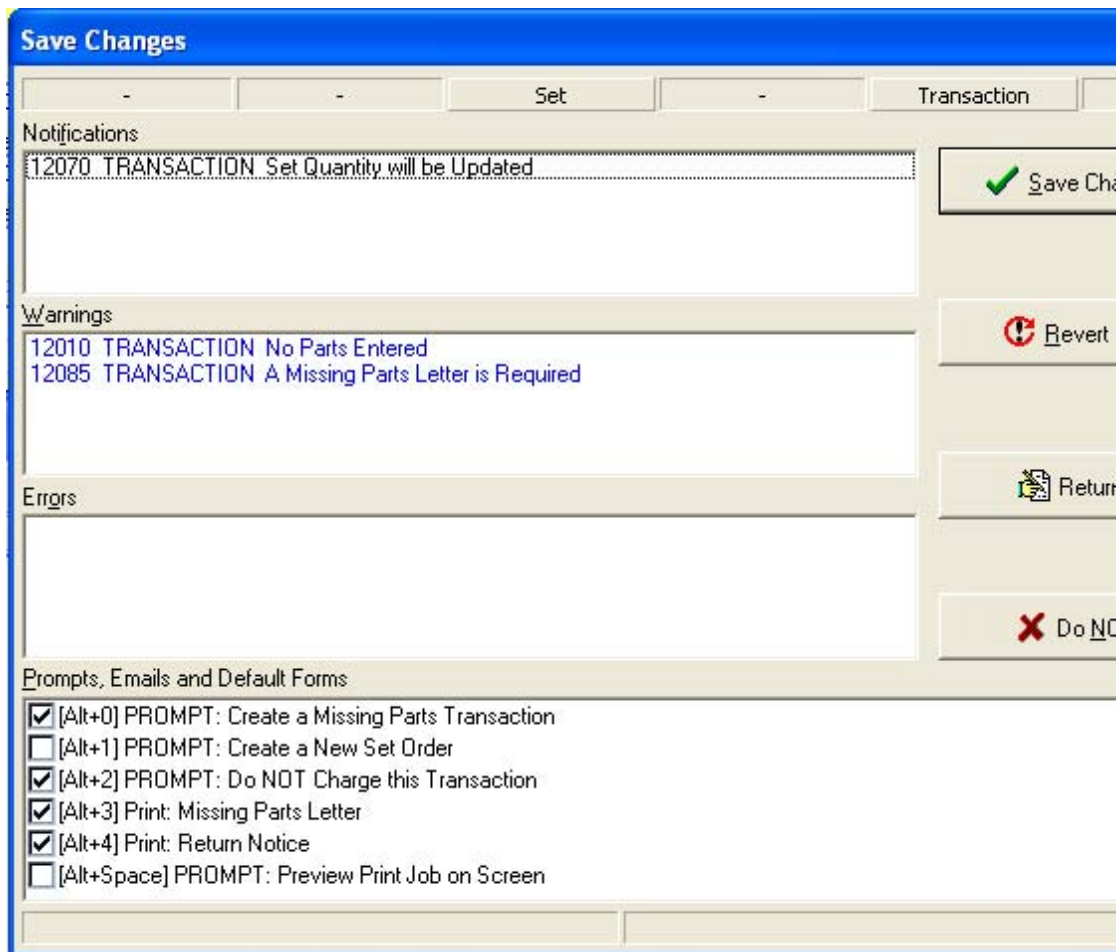
After you press the button the PDF Test screen is displayed.

First select an appropriate destination directory and the export file types you want to create, and then press the **Create Sample PDF Files** button.



After files have been created the size of the resulting files is displayed you can open them by selecting the filenames. **Note: to check that the PDF files will display the same for all users it is recommended you view them on a different computer than the one that created them.**

Keyboard-based option selection when saving

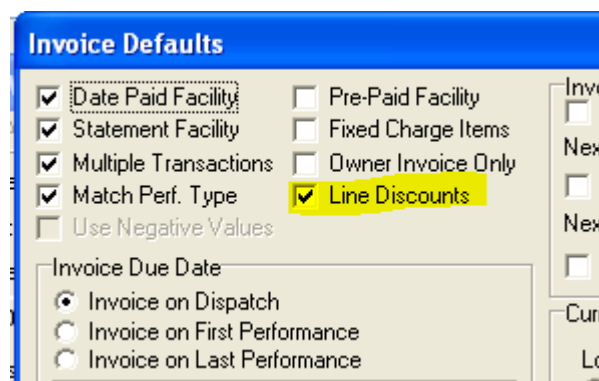


When saving items or consignments with multiple prompts, you can now use the displayed keyboard shortcuts to select or deselect options. The [Alt+Space] option is always used to toggle the *Preview Print Job on Screen* option but the other options will change according to what is being saved.

Invoice Line Discounts

It is now possible to enter discounts for amounts directly in into line amounts in HLMSW.

This option is enabled by selecting the *Line Discounts* option in the Invoice Defaults section of the *Edit Invoice/Credit Defaults* button on the System Configuration tab of the HLMSW Configuration Editor.



Once selected, two new columns **Subtotal** and **Discount** are available for display in the Invoice window

The screenshot shows the 'Edit Window (F7)' interface. At the top, there are tabs for 'Górecki M. (GOR...', 'Concerto-Notturn...', 'S:XSET', 'X2050', and 'Detail'. Below the tabs are fields for 'Invoice', 'Credit', 'Invoice Due', 'Invoice Date', 'Status', and 'Currency' (set to PLN). There are also fields for 'Payment Terms', 'Contract to' (set to '*Invoice Address*'), and 'Date Paid'. Checkboxes for 'Printed' and 'Grand right' are visible. A table with the following data is shown:

Description	Type	SubTotal	Discount	Amount	Tax Code	Tax %
10000218AI		100.00€		90.00€		
Hire fee	wyp. 7%	100.00€	10%	90.00€	K7=VAT w	7.000

You can enter a subtotal, amount or discount to change all of the other values and these values can all be printed on HLMSW forms.

Note: Only the values in the Amount and Discount columns are saved in HLMSW, the SubTotal column is calculated when it is displayed, and so (with rounding) may have a slightly different value when shown.

The Discount column works in the following way:

- If the discount is 0% OR 100%, then there is no change.
- If the discount is LESS than 100% then the discount is deducted from the Subtotal (eg 10% discount of \$100 is \$90).
- If the discount is MORE than 100% then the discount is added to the Subtotal (eg. 110% discount of \$110 is \$110).
- Fractional discounts (eg 33.33%) are not permitted.

Peter Grimshaw

16 May 2010