NCH Software
Reflect Customer Database

This user guide has been created for use with

Reflect Customer Database Version 3.xx

Technical Support

If you have difficulties using Reflect Customer Database please read the applicable topic before requesting support. If your problem is not covered in this user guide please view the up-to-date Reflect Customer Database Online Technical Support at www.nchsoftware.com/crm/support.html.

If that does not solve your problem, you can contact us using the technical support contacts listed on that page.

Software Suggestions

If you have any suggestions for improvements to Reflect Customer Database, or suggestions for other related software that you might need, please post it on our Suggestions page at www.nch.com.au/suggestions/index.html.

Many of our software projects have been undertaken after suggestions from users like you. You get a free upgrade if we follow your suggestion.

Reflect Customer Database

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Options ~ Web Routing http://www.nch.com.au/kb/10233.html

Introduction

Thank you for installing Reflect Customer Database.

Reflect is software that allows businesses to easily track customer information and interactions, record notes, tasks and events.

Reflect is entirely free, and can be installed and running in less than 60 seconds.

Features

- Store any number of to-do items, notes and events linked to a customer
- Set reminders for events, such as phone calls or meetings
- Run multiple (unlimited) businesses from one install
- Installs in less than a minute
- Designed to be very easy to use for day-to-day operation

System Requirements

- Windows 98/2000/XP/2003/Vista/7/8/10

How to Logon

Enter your Email address along with the password and click on Logon.

If you have forgotten your password, click the forgot your password? link below the password field. After filling out your registered email address, a new password will be sent to you by email.

Forgotten Password

If you have forgotten your password, click the forgot your password? link below the password field. After filling out your registered email address, a new password will be sent to you by email. Make sure you check your junk-mail folder if you don't see the email. If still not found, please check if you are connected to the internet, temporarily disable any internet firewalls, and try resetting the password again.

Getting Started

After you first install Reflect, the startup wizard will run. The wizard will prompt you for the most basic information about your business including your company name, address and contact details. These details will appear on reports.

After the startup wizard has run, you can create your first Account, Contact or Lead. Click on the New button at the top of any of these tabs, and start filling in all the needed information.

You can fine tune Reflect to suit your business using the configuration Options (from the Tools menu). From there, you can set up more details about your business, regional options, and web access.

Also located under the Tools menu, you have the option to import contacts from Outlook. This option allows you to import contacts directly from your Outlook address book.

Keyboard Shortcuts

The following list shows shortcuts for the most common tasks used in Reflect:

Universal Shortcuts

The following shortcuts can be used from any screen

Open Web Interface Ctrl+W

Adjust settings and Options Ctrl+O

Open Help Documentation F1

Exit (Close to Tray) Alt+F4

Account

- New account Ctrl+N
- Delete account Ctrl+D
- Import accounts from CSV Ctrl+I
- Export accounts to CSV Ctrl+E

Contact

- New contact Ctrl+N
- Delete contact Ctrl+D
- Import contacts from CSV Ctrl+I
- Export contacts to CSV Ctrl+E

Lead

- New lead Ctrl+N
- Delete lead Ctrl+D
- Import leads from CSV Ctrl+I
- Export leads to CSV Ctrl+E

To-Do

- New to-do Ctrl+N
- Delete to-do Ctrl+D

Event

- New event Ctrl+N
- Delete event Ctrl+D

Common Tasks: Summary Overview

You can select different data sheets by clicking on a tab. The data sheets include Account, Contact, Lead, To-Do and Event.

Creating a new record (Account, Contact, Lead, To-Do or Event)

Click the tab for the type of new record you will be creating, then click the New button on the tab's toolbar or press Ctrl+N. Enter all the needed information into the data fields in the lower half of the main screen.

Editing a record

Select a record in the list by clicking on the record. This will bring up that record's data at the bottom of the main screen, which can be edited as needed.

Deleting a record

Click the Delete button on the main toolbar or press Ctrl+D.

Creating reports of records to print, email or fax

You can create a report from any of the tabs within Reflect, which will display the list of records from that data sheet. Click Preview to view the report for that tab.

- Click Print if you want to print a list of records.
- Click PDF if you want to save a list of records as a PDF file.

Importing items from a csv file Right click on the list from any tab and select Import items from CSV file.

The Match CSV Fields dialog will appear, where you can match all needed fields from the csv file to Reflect item fields. You can see the Imported Fields listed on the left side of the screen and the Reflect Account Fields on the right side. To match an Imported Field to an Account Field, click on the corresponding Account Field under the Matching Import Fields column, and then select the matching field in the drop menu that will appear.

Exporting an item to a csv file

Select the item(s) that you want to export from a list. Right click on the item(s) and click Export to CSV file.

Remote Access

How to access Reflect remotely

1. The computer where Reflect is installed must be switched on, connected to the internet, and Reflect must be running. For convenience, you can check the Run on Startup option on the Company options tab. This will cause Reflect to run whenever you turn your computer on.
2. Set up login details for users who will be accessing Reflect remotely. Do this from the Web Accounts tab of the Options dialog.
3. Configure your firewall / router device to allow access to Reflect from the outside internet. Read the information at http://www.nch.com.au/kb/10046.html guidance on how to do this. Skip this step if you do not have a firewall / router device.
4. Determine the internet address of the computer running Reflect. This can be done using the Web Access tab of the Options dialog. Click on the Run Web Routing and Test Wizard button, and the Public Network address link on the tab will be updated. Enter the Public Network address into your web browser from your mobile device or outside-network computer.

NCH Software Suite

This is a useful way to browse all the software available from NCH Software

You can see a set of products by type like Audio, Video and so on and view the product. From there you can try out the product and it will download and install it for you to trial. If you already have the product installed then you can click "Run It Now" and the program will be launched for you.

There is also a list of features for products in the category. Click on a feature, such as "Edit a Video File", to install a product with that ability.

Search

Search our website for products matching any keywords you type.

See more of our software

Browse our website for more software.

Subscribe to our newsletter

You can subscribe to our newsletter for announcements of new releases and discounts. You can unsubscribe at any time.

See the latest discounts for purchase

See the latest discounts we are offering for purchasing our products.

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3. This software, and all accompanying files, data and materials, are distributed "as is" and with no warranties of any kind, whether express or implied except as required by law. If you intend to rely on this software for critical purposes you must test it fully prior to using it, install redundant systems and assume any risk.

4. We will not be liable for any loss arising out of the use of this software including, but not limited to, any special, incidental or consequential loss. Your entire remedy against us for all claims is limited to receiving a full refund for the amount you paid for the software.

5. You may not use this software in any circumstances where there is any risk that failure of this software might result in a physical injury or loss of life. You agree to indemnify us from any claims relating to such unauthorized use.

6. You may copy or distribute the installation file of this software in its complete unaltered form but you may not, under any circumstances, distribute any software registration code for any of our programs without written permission. In the event that you do distribute a software registration code, you will be liable to pay the full purchase price for each location where the unauthorized use occurs.

7. Use of statistics collected by the software is subject to the NCH Software Privacy Statement which allows automatic anonymized collection of usage statistics in limited circumstances.

8. The contract arising out of this agreement is governed by the laws and courts of the Australian Capital Territory.

Screen References - Dashboard

The dashboard is where you can get a general overview of what is going on in Reflect by looking at upcoming events on your calendar and To-Do list as well as quick access to new leads to follow up with.

Screen References - Account

This is where you fill in general details about the customer account.

General Tab

Account Name

Enter a name for the account.

Account Type

Enter the account category such as Customer or Competitor.

Salesperson

Enter the name of the individual you want to assign to the account or choose from the User List. Salesperson list is managed under contacts of primary business account.

Annual Revenue

Enter the annual revenue for the organization.

Primary Contact

Choose a primary contact for the organization.

Industry

From the drop-down list, select the industrial sector to which the account belongs.

No. of Employees

Enter the number of employees in the organization.

Description

Enter a description for the organization.

Address Tab

Select Address

Choose type of address that you want to edit from the drop menu; Billing Address or Shipping Address.

Billing Address

Enter the billing address of the organization.

Shipping Address is same as billing address

Select this to use the billing address for shipping.

Shipping Address

Enter the shipping address of the organization.

Phone

Enter the phone number of the organization.

Phone 2

Enter an alternative phone number for the organization, if any.

Fax

Enter the fax number for the organization.

Email

Enter an email address for the organization.

Website

Enter the URL for the organizations website.

Contacts, Notes, To-Do, and Event Tabs

Contacts

Add or edit contacts by clicking on the list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a contact. You can also complete this information from the main Contact tab, and link it to this customer's account

Notes

Add or edit notes by clicking on the list and filling in the details appropriate to the headings. Attach a file to the note by right clicking in the list and selecting Select attachment. Click the red X at the end of a row to delete a note.

To-Do

Add or edit to-do items by clicking on the list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a note. You can also complete this information from the main To-Do tab, and link it to this customer's account. Any To-Do items you enter will be visible from every To-Do tab.

Event

Add or edit events by clicking on a list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a note. You can also complete this information from the main Events tab, and link it to this customer's account. Any Event items you enter will be visible from every Event tab.

Screen References - Contact

Fill in the details for your contacts with each account.

General Tab

Prefix

Enter the contact's prefix. Eg: Mr., Mrs., Ms., Dr., etc.

Title

Enter the contact's business title.

First Name

Enter the contact's first name.

Salesperson

Enter the name of the individual you want to assign to the contact, or choose from the User List. Salesperson list is managed under contacts of primary business account.

Last Name

Enter the contact's last name.

Department

Enter the department to which the contact belongs.

Account

Choose the account name associated with the contact.

Lead Source

From the drop-down list, select the source that generated the lead, such as direct mail or trade show.

Description

Enter a brief description for the contact.

Address Tab

Primary Address

Enter the primary address of the contact.

Secondary Address

Enter the secondary address of the contact.

Home Phone

Enter the home phone number of the contact.

Mobile

Enter the mobile number of the contact.

Work Phone

Enter the work phone number of the contact.

Do not call

Select this if the contact does not want to receive phone calls.

Fax

Enter the fax number for the contact.

Email

Enter an email address for the contact.

Notes, To-Do, and Event Tabs

Notes

Add or edit notes by clicking on the list and filling in the details appropriate to the headings. Attach a file to the note by right clicking in the list and selecting Select attachment. Click the red X at the end of a row to delete a note.

To-Do

Add or edit to-do items by clicking on the list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a note. You can also complete this information from the main To-Do tab, and link it to this customer's account. Any To-Do items you enter will be visible from every To-Do tab associated with this account.

Event

Add or edit events by clicking on a list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a note. You can also complete this information from the main Events tab, and link it to this customer's account. Any Event items you enter will be visible from every Event tab associated with this account.

Screen References - Lead

This tab is used to keep information about leads. To create a new lead, click the New button in the toolbar. Delete the selected lead by clicking the Delete button. If a lead turns into a client, you can select the lead from the list and click the Convert button to turn the record into an account and contact.

General Tab

Prefix

Enter the lead's prefix. Eg: Mr., Mrs., Ms., Dr., etc.

Title

Enter the lead's business title.

First Name

Enter the lead's first name.

Salesperson

Enter the name of the individual you want to assign to the lead, or choose from the User List. Salesperson list is managed under contacts of primary business account.

Last Name

Enter the lead's last name.

Industry

From the drop-down list, select the industrial sector to which the lead belongs.

Company

Enter the company to which the lead belongs.

Department

Enter the department to which the lead belongs.

Annual Revenue

Enter the annual revenue for the lead.

No. of Employees

Enter the number of employees in the lead.

Lead Source

From the drop-down list, select the origins of the lead such as Trade Show or Direct Mail.

Lead Status

Select the status of the lead from the drop-down list.

Description

Enter a brief description for the lead status.

Referred by

If someone referred the lead to you, enter the information in this field.

Address Tab

Primary Address

Enter the primary address of the lead.

Secondary Address

Enter the secondary address of the contact.

Home Phone

Enter the home phone number of the lead.

Mobile

Enter the mobile number of the lead.

Work Phone

Enter the work phone number of the lead.

Do not call

Select this if the contact does not want to receive phone calls.

Fax

Enter the fax number for the lead.

Email

Enter an email address for the lead.

Notes, To-Do, and Event Tabs

Notes

Add or edit notes by clicking on the list and filling in the details appropriate to the headings. Attach a file to the note by right clicking in the list and selecting Select attachment. Click the red X at the end of a row to delete a note.

To-Do

Add or edit to-do items by clicking on the list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a note. You can also complete this information from the main To-Do tab, and link it to this customer's account. Any To-Do items you enter will be visible from every To-Do tab associated with this account.

Event

Add or edit events by clicking on a list and filling in the details appropriate to the headings. Click the red X at the end of a row to delete a note. You can also complete this information from the main Events tab, and link it to this customer's account. Any Event items you enter will be visible from every Event tab associated with this account.

Screen References - To-Do

Enter To-Do items related to an account, contact, or lead.

Name

Enter the name of the to-do task.

Status

From the drop-down list, select the current status of the task, such as Open, Done, or Not done.

Refer to type

From the drop-down list choose the category the To-Do item is related to: Account, Lead or Contact.

Refer to name

From the drop-down list choose the name of the related account, lead or contact. The options available in the drop-down list depend on the value selected in the Refer to type drop-down list.

Priority

Enter a priority that reflects the importance of completing the task.

Description

Enter a brief description of the task.

Screen References - To-Do

Enter To-Do items related to an account, contact, or lead.

Name

Enter the name of the to-do task.

Description

Enter a brief description of the task.

Status

From the drop-down list, select the current status of the task, such as Open, Done, or Not done.

Priority

Enter a priority that reflects the importance of completing the task.

Screen References - Event

Topic

Enter the name of the calendar event.

Type

Enter the type of the calendar event such as Call, Meeting, etc.

Owner

Enter the owner's name of the event.

Status

From the drop-down list, select the current status of the event, such as Planned, Held, or Not held.

Refer to type

From the drop-down list choose the category the To-Do item is related to: Account, Lead or Contact.

Refer to name

From the drop-down list choose the name of the related account, lead or contact. The options available in the drop-down list depend on the value selected in the Refer to type drop-down list.

Start Date Time

Enter the start date for the event.

Reminder Time

Enter the reminder time for the event in minutes.

Duration

Enter the duration of the event using HH:MM format.

Description

Enter a brief description of the task.

Screen References - Event

Topic

Enter the name of the calendar event.

Description

Enter a brief description of the task.

Type

Enter the type of the calendar event such as Call, Meeting, etc.

Status

From the drop-down list, select the current status of the event, such as Planned, Held, or Not held.

Owner

Enter the owner's name of the event.

Duration

Enter the duration of the event using HH:MM format.

Start Time

Enter the start date for the event.

Reminder (minutes)

Enter the reminder time for the event in minutes.

Screen References - Note

Add or edit notes and attachments related to an account, contact, or lead.

Subject

Enter the subject of the note.

Description

Enter a brief description for the note.

Attachment

Attach a file to the note. The file will be copied to Reflect database for you to modify its content if required. The original file is left untouched.

Web Access - Account

This page allows for the entry of new Accounts and editing existing Accounts.

Account Name

Enter a name for the account.

Salesperson

Enter the name of the individual you want to assign to the account or choose from the User List. Salesperson list is managed under contacts of primary business account.

Account Type

Enter the account category such as Customer or Competitor.

Industry

From the drop-down list, select the industrial sector to which the account belongs.

No. of Employees

Enter the number of employees in the organization.

Annual Revenue

Enter the annual revenue for the organization.

Description

Enter a description for the organization.

Primary Contact

Choose a primary contact for the organization.

Select Address

Choose type of address that you want to edit from the drop menu; Billing Address or Shipping Address.

Billing Address

Enter the billing address of the organization.

Shipping Address

Enter the shipping address of the organization.

Phone

Enter the phone number of the organization.

Phone 2

Enter an alternative phone number for the organization, if any.

Fax

Enter the fax number for the organization.

Email

Enter an email address for the organization.

Website

Enter the URL for the organizations website.

Notes

Add a new Note by clicking on the Add Note button, or edit existing Notes by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a Note.

To-Do

Add a new To-Do item by clicking on the Add To-Do button, or edit an existing To-Do items by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a To-Do item.

Event

Add a new Event by clicking on the Add Event button, or edit an existing Event by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete an Event.

Contact

Add a new Contact by clicking on the Add Contacts button, or edit an existing Contacts by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a Contact.

Web Access - Contact

This page allows for the creation of new Contacts or editing of existing Contacts.

Prefix

Enter the contact's prefix. Eg: Mr., Mrs., Ms., Dr., etc.

First Name

Enter the contact's first name.

Last Name

Enter the contact's last name.

Salesperson

Enter the name of the individual you want to assign to the contact, or choose from the User List. Salesperson list is managed under contacts of primary business account.

Title

Enter the contact's business title.

Department

Enter the department to which the contact belongs.

Description

Enter a description for the organization.

Lead Source

From the drop-down list, select the source that generated the lead, such as direct mail or trade show.

Account

Choose the account name associated with the contact.

Primary Address

Enter the primary address of the contact.

Secondary Address

Enter the secondary address of the contact.

Home Phone

Enter the home phone number of the contact.

Mobile

Enter the mobile number of the contact.

Do not call

Select this if the contact does not want to receive phone calls.

Work Phone

Enter the work phone number of the contact.

Fax

Enter the fax number for the contact.

Email

Enter an email address for the contact.

Notes

Add a new Note by clicking on the Add Note button, or edit existing Notes by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a Note.

To-Do

Add a new To-Do item by clicking on the Add To-Do button, or edit an existing To-Do items by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a To-Do item.

Event

Add a new Event by clicking on the Add Event button, or edit an existing Event by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete an Event.

Web Access - Lead

This page allows for the creation of new Leads or editing of existing Leads.

Prefix

Enter the lead's prefix. Eg: Mr., Mrs., Ms., Dr., etc.

First Name

Enter the lead's first name.

Last Name

Enter the lead's last name.

Salesperson

Enter the name of the individual you want to assign to the lead, or choose from the User List. Salesperson list is managed under contacts of primary business account.

Title

Enter the lead's business title.

Company

Enter the company to which the lead belongs.

Industry

From the drop-down list, select the industrial sector to which the lead belongs.

Department

Enter the department to which the lead belongs.

No. of Employees

Enter the number of employees in the lead.

Annual Revenue

Enter the annual revenue for the lead.

Description

Enter a brief description for the lead status.

Referred by

If someone referred the lead to you, enter the information in this field.

Lead Source

From the drop-down list, select the origins of the lead such as Trade Show or Direct Mail.

Lead Status

Select the status of the lead from the drop-down list.

Primary Address

Enter the primary address of the lead.

Secondary Address

Enter the secondary address of the lead.

Do not call

Select this if the contact does not want to receive phone calls.

Home Phone

Enter the home phone number of the lead.

Mobile

Enter the mobile number of the lead.

Work Phone

Enter the work phone number of the lead.

Fax

Enter the fax number for the lead.

Email

Enter an email address for the lead.

Notes

Add a new Note by clicking on the Add Note button, or edit existing Notes by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a Note.

To-Do

Add a new To-Do item by clicking on the Add To-Do button, or edit an existing To-Do items by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete a To-Do item.

Event

Add a new Event by clicking on the Add Event button, or edit an existing Event by filling in the details appropriate to the headings. Click the delete icon at the end of a row to delete an Event.

Web Access - To-Do

This page allows for the creation of new and editing of existing To-Do items related to an account, contact, or lead.

Name

Enter the name of the To-Do task.

Status

From the drop-down list, select the current status of the task, such as Open, Done, or Not done.

Priority

Enter a priority that reflects the importance of completing the task.

Refer to type

From the drop-down list choose the category the To-Do item is related to: Account, Lead or Contact.

Refer to name

From the drop-down list choose the name of the related account, lead or contact. The options available in the drop-down list depend on the value selected in the Refer to type drop-down list.

Description

Enter a brief description of the task.

Web Access - Event

This page allows for the creation of new and editing of existing Events related to an account, contact, or lead.

Topic

Enter the name of the calendar event.

Owner

Enter the owner's name of the event.

Status

From the drop-down list, select the current status of the event, such as Planned, Held, or Not held.

Type

Enter the type of the calendar event such as Call, Meeting, etc.

Refer to type

From the drop-down list choose the category the To-Do item is related to: Account, Lead or Contact.

Refer to name

From the drop-down list choose the name of the related account, lead or contact. The options available in the drop-down list depend on the value selected in the Refer to type drop-down list.

Duration

Enter the duration of the event using HH:MM format.

Start Date Time

Enter the start date for the event.

Reminder Time

Enter the reminder time for the event in minutes.

Description

Enter a brief description of the task.

Web Access - Select Company

This page provides a dialog which allows the selection of the company you wish to view. This is particularly useful when multiple businesses are setup.

Screen References - Fax Settings

To send faxes you need an electronic gateway to send direct from your PC using email protocols. Click on the recommended gateways link for more information.

Gateway domain (after @):

To send faxes you must enter the gateway domain (that is the part after @). For example to send a fax to [FaxNumber]@yourfaxco.com enter yourfaxco.com as the domain.

Screen References - Fax Number

Please enter the telephone number for the fax to send to.

Remember this fax number

Tick 'Remember this fax number' to save the number for use in the future.

Screen References - Email Address

Please enter the email address you want to send to. This needs to be the full email address, e.g. tom.jones@example.net . To send to multiple email addresses, separate each address with a comma.For problems with sending an email, please refer to this page.

Remember this email address

If this option is available, tick 'Save this as email ...' to save the email address for use in the future.

Screen References - Print Preview

The Preview window displays each page of the document as it will be printed by the printer.

Print (if available)

You can print the document by clicking the Print button.

This will open the printer selection and settings dialog where you can select which pages of the document to print.

Previous and Next

Use the Previous and Next buttons to view each page of the document when there is more than one page to print.

Close

The Close button closes the window.

Screen References - Back Up Data

It is essential that you backup your data regularly just in case something goes wrong. Please select one of the options below.

Backup Options

Back up to a Network Folder

This is a good option if you are working in an office. Ask your Network Administrator to create a safe folder on the shared server. Select this folder and click Backup. The entire application folder will be copied to that folder. If something goes wrong (like a hard drive crash) you just copy back the folder and everything will be restored.

Back up to a CD or DVD with Express Burn

Select this option to burn all the data to disc using Express Burn. See www.nch.com.au/burn to learn more about Express Burn.

Back up to a Removable Drive

As an alternative use this option to backup to an external USB hard drive or USB key flash drive. Please consider using MEO to encrypt the files if using removable media.

Screen References - Multiple Businesses

A single installation of Reflect can manage many businesses. They run as if they were entirely different installs. Every single setting can be changed for each business.

To add a business, from the menu select Reflect -> Multiple Businesses. Then click Add. After you click Add, the Startup Wizard will run, and you will be asked to fill in the basic details for the additional business.

Screen References - User Account

To give a user access to Reflect's web interface, you need to set up a new user account. Do this from Options -> Web Accounts, and the click Add to bring up the User Account dialog. You can edit an existing user from Options -> Web Accounts, select a user, and click Preferences. Each Reflect user account is identified by their email address.

Display Name:

Enter the user's name. This is used for display purposes.

Email address:

This is used to uniquely identify the user. The user will use their email as the user account name when they login to the Reflect web interface. If the user forgets their password for login, it will be emailed to them at this email address.

Password:

Enter the password for this user. The user will use this along with their email to login to the Reflect web interface.

Account Enabled

Check (tick) this option to enable the user account.

User Privileges

Administrator

Check this option if this user should be able to modify others users' preferences and to add/edit/remove transactions.

User

Check this option if this user should be able to add/edit/remove transactions, but not to modify other users' preferences.

Viewer

Check this option if this user should not be able to add/edit/remove transactions or modify other users' preferences. They will only be able to view the information already entered into Reflect.

Organizations

Select from the list of organizations the user will have access to.

Screen References - Match CSV Fields

User should select the row number from which Reflect program should start to read the data. The selected row number should be the line of data containing the field names for each type of data. From the left Import list, the user can see these data fields imported from the CSV file. And in the right list, they can see field names Reflect uses that will match up to the corresponding fields in the CSV file. User should double click the Matching Import Fields column inside the list, and then select the corresponding field for the selected row.

Screen References - Options ~ Web Access

Browser Access

For more information on setting up Browser Access, see this Knowledge Base article: www.nch.com.au/kb/10233.html .

Screen References - Options ~ Company

Enter or edit details about your business or company from the Company tab of the Options menu.

Company Details

Business Name:

Enter the official name of the business (e.g., Acme Corporation, Inc).

Registered Number:

In many countries, each business has an official number. Please enter it here.

Address:

Enter the address of your business.

Contact Details:

Enter the business contact details. For example, phone, fax and email address.

Logo image file:

To add your logo to reports, select the file path to the logo image. Accepted file types include jpg and png.

Run on Startup

Reflect can be configured to run automatically whenever a user logs on to the computer.

Run Reflect automatically when you login

Tick this option if you want Reflect to run automatically when a user logs on to the computer. Specify for whom Reflect will automatically startup by selecting one of the following options from the pull down list:

- Start when any user logs on: to start Reflect whenever any person logs on to the computer.
- Start when this user logs on only: to start Reflect only when the current user logs on to the computer.
- Start before logon. Show all users' tray: All users that are logged in will be displayed in your system tray.
- Start before logon. Show this user only: Show just yourself when you are logged in, you will appear in your system tray.
- Start before logon. Do not show icon: Show no icons in your system tray.

Screen References - Options ~ Other

Regional Format Settings

Decimal Symbol:

This is the symbol used for the decimal point - usually a dot everywhere but in Europe where a comma is used.

Thousands Symbol:

This is the symbol used to separate thousands - usually a comma.

Number of Digits After Decimal Point:

This is the number of digits after decimal point.

Paper Size:

This is the paper size used for pdf generation and when the default printer is used.

Send Settings

Email Settings...

Please refer to Knowledge Base Articles - Problems when sending email using our software for more information.

Fax Settings...

Click this button to set up for sending faxes with Reflect.

Margins (inches)

You can set the margins for all reports here by entering new margins for the sides, and the top/bottom.

Screen References - Options ~ Web Accounts

The Web Accounts tab displays all the Reflect user accounts that are set up. It is also where you can edit or add a new Reflect user account.

Web Accounts

List of user accounts.

Add...

Click Add to add a new user account to Reflect.

Remove

Click Remove to delete the selected user account from Reflect.

Preferences...

Click Preferences to edit details of the selected Reflect user account.