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New Features - Windows version vs. DOS version

Budget Planner for Windows has evolved considerably from its DOS predecessor. This is a comparison of Budget Planner for Windows to Budget Planner for DOS.

Win - The ability to name your own files and save them in any directory
DOS - Used one database file with a fixed name in the software's directory

Win - Scrollable item/amount lists capable of holding 30 entries
DOS - Individual item/amount fields holding one entry

Win - All file maintenance functions in one window (add, print, etc.)
DOS - Individual maintenance function selection from pull-down menus

Win - "Stereo" browse buttons can display your saved information instantly
DOS - Browse required locating a record before displaying

Win - More intuitive maintenance process (add, change, delete)
DOS - Confusing "press Enter from Amount field" update process

Win - "Safety" temporary disabling (gray-out) of non-related menu items
DOS - No comparable function

Win - Selection of any printer driver set up in your Windows configuration
DOS - Uses hardware ports for directing output

Win - Printer Setup for configuring your Windows printer driver options
DOS - No comparable function

Win - Using Windows' Print Manager you can continue working while you print
DOS - Program was bound until printing completed

Win - More flexible printing options (full file, range of records)
DOS - Only printed individual records

Win - Advanced help file with index and topics sections
DOS - Pull-down menu help

FILE Menu Group

The **File** menu group contains the following options:

- N**ew** -- Open new budget database file
- O**pen** -- Open existing budget database file
- C**lose** -- Close existing budget database file
- M**aintenance** -- File activity (add, print, etc.)
- P**rint** -- Print options
- P**rint Setup** -- Set print driver options
- E**xit** -- End and return to Windows

When you first enter the program, the **Close**, **Maintenance**, and **Print** options are grayed because those functions are not used until a database file is opened.

Once a database is opened, the **New**, **Open**, and **Exit** options are grayed because they are not to be used when a file is open.

HELP Menu Group

The **Help** menu group contains the following options:

Topics... -- Help file topics

Index -- Help file index

About Budget Planner for Windows -- Title/version/author window

To select one of these items, click the **Help** menu and click the item of your choice.

NEW Menu Item

Select this menu option to create a **new** (empty) budget database file.

All Budget Planner for Windows database files have a **.CRD** extension.

Select the directory to save your file in by clicking in the **Directories** box. If the directory contains other .CRD files they will be shown in gray in the file name box. **SELECTING A GRAYED FILE DESTROYS THE ORIGINAL AND CREATES A NEW EMPTY FILE IN ITS PLACE.**

You may select a different drive by clicking the **Drives** box.

Click the **Ok** button to create the new file or **Cancel** to abort the process.

If the file open was successful, a message window will be displayed stating the file is open.

OPEN Menu Item

Select this menu option to open an **existing** budget database file.

All Budget Planner for Windows database files have a **.CRD** extension.

Select the directory to open your file from by clicking in the **Directories** box.

All other **.CRD** files will be shown in the file name box. You may type the name of the file to be opened and click the **Ok** button or double-click on the file of your choice.

You may select a different drive by clicking the **Drives** box.

Click the **Ok** button to open the new file or **Cancel** to abort the process.

If the file open was successful, a message window will be displayed stating the file is open.

CLOSE Menu Item

Select this menu option when you are finished with an open database file. If the file close is successful, a message window will be displayed stating the file was closed.

Alternately, you may double-click the main window close box to exit the program and automatically close the open file without displaying the close message.

MAINTENANCE Menu Item

The **Maintenance** window is the "nerve center" of Budget Planner for Windows. The following functions are performed from the Maintenance window:

- Add -- Insert new record into file
- Change -- Modify contents of an existing record
- Delete -- Remove an existing record
- Totals -- Calculate budget statistics
- Clear -- Erase the window entry field contents
- Print -- Print a file record
- Help -- Access the help file
- Exit -- Close the Maintenance window
- First file record ("I<") -- Display first record in a file
- Previous file record ("I<") -- Display the previous record from current
- Find file record ("I?I") -- Locate a specific record in a file
- Next file record ("I>") -- Display the next record from current
- Last file record ("I>") -- Display the last record in a file

PRINT Menu Item

Budget Planner for Windows offers two methods of printing:

Print menu option (available in the registered version of BPW)

Printing from the Maintenance window

PRINT SETUP Menu Item

This menu option opens a Windows' Print Setup box to allow you to configure your print settings.

EXIT Menu Item

Clicking the **Exit** menu option ends the program and returns you to Windows.

TOPICS... Menu Item

Clicking the **Topics...** menu option opens the help file and displays the help topics article.

INDEX Menu Item

Clicking the **Index** menu option opens the help file and displays the help index.

ABOUT BUDGET PLANNER FOR WINDOWS Menu Item

Clicking this menu option displays the information window for Budget Planner for Windows. It contains the following information:

Program Title
Program Version
Author
Copyright Year

This window is provided for information purposes.

Add Record (Maintenance)

To add a record into a budget database file:

First, from the Maintenance window, click the **Add** button. A message will prompt you to fill in the entry fields. The date and time are filled in and are not editable in add mode. You can only modify the date and time in change mode.

Second, fill in the Description, Budget Amount, Item, and Amount fields. The Item and Amount fields are scrollable lists which may hold up to 30 entries.

NOTE: only Item/Amount entries greater than \$0.00 will be calculated in the Totals fields. If the Description and/or Budget Amount fields are not filled in, a message prompts you to do so.

Third, after entering information in the entry fields, click **Add** again. A message will be displayed showing the record was added to the file and if you wish to repeat the process to click the Add button again.

To abort the add process at any time, click the Clear button.

Change Record (Maintenance)

To change the contents of a budget database record:

First, from the Maintenance window, locate the record you wish to modify. Use the browse buttons ("|<" "<" "|?" ">" ">|") to display the record's contents in the entry fields.

Second, modify any entry field -- Date, Time, Description, Budget Amount, Item, and/or Amount. If you change the Budget Amount and/or any Amount list item, click the Totals button to recalculate the statistics values.

Third, click the **Change** button. A message informs you that your changes were successfully saved.

To abort the change process at any time, click the Clear button.

Delete Record (Maintenance)

To delete a budget database record:

First, from the Maintenance window, locate the record you wish to modify. Use the browse buttons ("|<" "<" "|?|" ">" ">|") to display the record's contents in the entry fields.

Second, click the **Delete** button. A confirmation message asks if you are sure this is the record you want to delete. Click the **Yes** button to delete the record or the **NO** button to abort the delete. **If you click the Yes button the deletion is immediate and irreversable. The only ways to recover a deleted record is to add the record again or restore the database file from a backup.**

To abort the delete process, click the **NO** button and then the Clear button.

Totals (Maintenance)

The **Totals** button calculates the budget statistics of the current record.
The budget statistics are:

Total Items
Total (budget items) Amount
Difference (from budget amount)
Percentage (of budget amount)

When adding, changing, or deleting a database record, the budget statistics are updated by clicking the **Totals** button.

Clear (Maintenance)

The **Clear** button erases all values from the entry and statistics fields and resets the add process to its beginning.

Print Record (Maintenance)

To print your budget database record, click the **Print** button. A standard print box will be opened. Choose your printer and click the **Ok** button to print. If you are using Windows' Print Manager, the print job will be spooled to the selected printer.

Since the Item and Amount lists can hold up to 30 entries, the lists are printed to the length of the last **Amount** item greater than \$0.00.

To abort the print process, press the **Cancel** button in the print box.

[Creating a printable ASCII file of a database record](#)

Help (Maintenance)

Clicking the **Help** button opens the help file and displays the Maintenance help article.

Exit (Maintenance)

Clicking the **Exit** button closes the Maintenance window and returns you to the main window.

First Record (Maintenance)

Clicking the **First Record ("I<")** button displays the first record of the database file. File records are sorted in descending order from most recent to least recent by date, time, and description.

To clear the display, click the Clear button.

Previous Record (Maintenance)

Clicking the **Previous Record ("<")** button displays the previous record from the last viewed record in the database file. File records are sorted in descending order from most recent to least recent by date, time, and description.

To clear the display, click the Clear button.

Find Record (Maintenance)

The **Find Record ("I?I")** button is used to locate a specific record without having to "scroll" from record to record. It is normally used to find records in the middle of a database containing several records.

Clicking the **Find Record ("I?I")** button opens the Find Record window which displays a list of budget **descriptions** in the sorted order of the database file. File records are sorted in descending order from most recent to least recent by date, time, and description.

To select a record, highlight the description of your choice and press the **Continue** button. The record is immediately displayed in the window.

To abort the search, click the **Cancel** button. This will display the last record of the database file. Click the Clear button to clear the display.

Next Record (Maintenance)

Clicking the **Next Record (">")** button displays the next record from the last viewed record in the database file. File records are sorted in descending order from most recent to least recent by date, time, and description.

To clear the display, click the Clear button.

Last Record (Maintenance)

Clicking the **Last Record (">")** button displays the last record of the database file. File records are sorted in descending order from most recent to least recent by date, time, and description.

To clear the display, click the Clear button.

How To Register Your Program

As you exit Budget Planner for Windows, you will come to the **Register BPW / Exit** window. This window contains two buttons: **Print Registration Form**, and **Exit**.

Click the **Print Registration Form** button to open the **Registration Form** window.

[Filling out the Registration Form](#)

[Printing the Registration Form](#)

Filling out the Registration Form

To complete the Budget Planner for Windows Shareware Registration Form, fill in the following fields:

Name Address City State Zip Code Number of Copies

Click the **Totals** button to generate the proper prices and the [Print](#) button to print the form.

Printing the Registration Form

To print your Budget Planner for Windows Shareware Registration Form, click the **Print** button. A Windows Print box is displayed. Select your printer and click the **Ok** button. To abort the print process, click the **Cancel** button.

[Creating a printable ASCII file of the Registration Form](#)

Creating a Print File

In addition to printing your database records and Shareware Registration Form, you also have the option of saving your output as an ASCII "text" file.

To create a text file:

Be sure you have the Windows **Generic / Text** printer driver loaded in your Windows directory.

Be sure the driver is configured to **File** instead of an LPT port.

Select the **Generic / Text** driver when you wish to create a text file.

When you click the **Ok** button from the Print box a small window will appear prompting you to enter a file name. It is recommended that you use a **.TXT** extension with your file name. You may use a path along with your file name.

Click the **Ok** button from the file name box and the text file will be created.

