Software that fits you
Chameleon Software

## Case Manager Icons - The Case Selector (Top Row)

| Icon | Button title (Keyboard Shortcut) | Use |
|---|---|---|
| | Time Sheet (Ctrl+T) | Time Sheet displays the time entries for a single employee per day. Employee times can be added via the time sheet window or under the documents or costs tabs in the grid. |
| | Task List (Ctrl+K) | The Task List allows you to sort and filter your tasks to help prioritise your work and improve your efficiency. |
| | Calendar (Ctrl+L) | The Calendar allows you to view (daily, weekly, monthly or timeline) and filter appointments.<br>Calendar views: daily , work week, weekly, timeline |
| | Employee List (Ctrl+E) | Employee List maintains all the personal (work related) information as well as security and permissions for an individual. The personal information collected can then be inserted into documents through merge fields. |
| | Other Lists (Ctrl+O) | Other Lists allows you to add, delete and amend the options that appear in drop down lists throughout Case Manager. |
| | Reports (Ctrl+R) | Reports allow you to create standard reports in Case Manager as well as your own reports using the Custom Report Utility. Note SQL skills needed to create reports. |
| | Journal Entry List (Ctrl+J) | The Journal Entry List presents summary information for a collection of transactions (invoices, adjustments and/or payments). Each journal entry shows total invoices, total GST and total payments received. |
| | Company List (F12) | The Company List is the source of contact details (e.g. contact person, address, phone, email) for the companies your organisation works with. |
| | Workflow Designer (Ctrl+W) | Workflow Designer assists you to create a series of steps that define how a process should be carried out. It defines actions and timeframes to meet requirements and enables reporting on the level of compliance with expected practises. |
| | Search (F3) | The Search assists you to quickly locate information in documents and invoices. This can be filtered by date range, category, office or team. |

## Case Manager Icons - The Case Selector (2nd Row)

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|---|---|---|
| | New Case (Ctrl+N) | New Case allows you to create a file to record the details of a new client first and last name are the only mandatory fields). |
| | Duplicate Case | Duplicate Case allows you to create a second case for the same client. It will retain case details and contacts in the duplicate case but no documentation or costs/accounts from the original case. |
| | Delete Case | Delete Case will delete the case you have selected in the case selector. |
| | Save Case List Layout | Save Case List Layout saves the layout of your cases in the Case Selector. |
| | Print Case List | Print Case List will open a window which allows you to print, preview, email or export to different files the case list displayed on the grid. |
| | Export Grid to Excel | Export Grid to Excel will export the grid information to an Excel spreadsheet. |
| | Refresh | Refresh updates your database to show the latest changes made by all users. |
| | Case List Criteria | Case List Criteria controls the cases you see in the Case Selector and which columns are seen. You can also save different Case List Views via the 'Save' tab. |
| | Show Quick Filter Row | Show Quick Filter Row adds a filter row at the top of the grid. You can then type the beginning letters/number or name you are looking for. The grid will then only show records with the letters/number you are filtering for. |
| | Group by Box | Group by Box allows you to group the records in the grid by dragging a column heading to the top of the grid. |
| | Show Footer (Totals) | This shows the totals of a column in the grid, it will do a count of the number of records in the grid for that column. |

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## Case Manager Icons - The Client File

| Icon | Button Title | Use/purpose |
|---|---|---|
| | Add New | Add New creates a new item such as a new document in the document tab and a new cost in the cost tab. |
| | Delete | Delete removes items such as a document in the document tab and a cost in the cost tab. Security settings limit who can delete information and if there is any data associated with the item you are trying to delete you will not be permitted to delete it. |
| | Open in a new Window | Open in a new Window opens the item selected in a new window so you can move to other cases or tabs and refer back to this item. |
| | Print | Print will open a window to select print options for what item is displayed in the grid. |
| | Export to Excel | Export to Excel opens an Excel spreadsheet containing what is displayed in the grid. |
| | Refresh | Refresh updates your database to show the latest changes made by all users. |
| | Save | Save will save any changes you have made.Saving occurs automatically when you move out of a field. |
| | Undo | Undo will undo your last action. |
| | Column chooser | Column chooser allows you to select the columns you want displayed. Click on the title of the column you want to add and drag and drop the column onto the title bar. To remove columns, click on the title and drag and drop it back out of the title bar. |
| | Duplicate | Duplicate allows you make a copy of the item. |
| | Show Quick Filter Row | Show Quick Filter Row adds a filter row at the top of the grid. You can then type the beginning letters/number or name you are looking for. The grid will then only show records with the letters/number you are filtering for. |
| | Group by Box | Group by Box allows you to group the records in the grid by dragging a column heading to the top of the grid. |
| | Show Footer (totals) | Show Footer reveals the totals of a column in the grid,  it will do a count of the number of records in the grid for that column. |