

# Kardia Configurable Solutions™

INTEGRATED INTO QUICKBOOKS™

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BILLING AND INVOICING | INVENTORY MANAGEMENT | PAYMENT PROCESSING

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## INTRODUCTION

Thank you for your interest in Kardia. Kardia integrates with QuickBooks™; both the desktop and online versions.

QuickBooks™ is a great product for managing a company's financial information. We use it ourselves internally. *BUT*, there are areas that QuickBooks™ does not address or does not address to the level that a business may need. Kardia allows you to maintain your investment in QuickBooks™ as well as add those other custom business functions. And since Kardia can integrate with QuickBooks™, it means you can add those other functions and not have to take time re-entering the relevant data into QuickBooks™.

Kardia and QuickBooks™ can provide a powerful and flexible solution for small businesses. We have spent years building Kardia using CST — which stands for our 'Configurable Solutions Technology'. This allows for highly customized business rules without having to customize any software. Kardia has hundreds of installs of its Configurable Solutions and despite all of our users running the same baseline of code, we are still more than able to handle everyone's detailed operational needs across a wide range of business types.

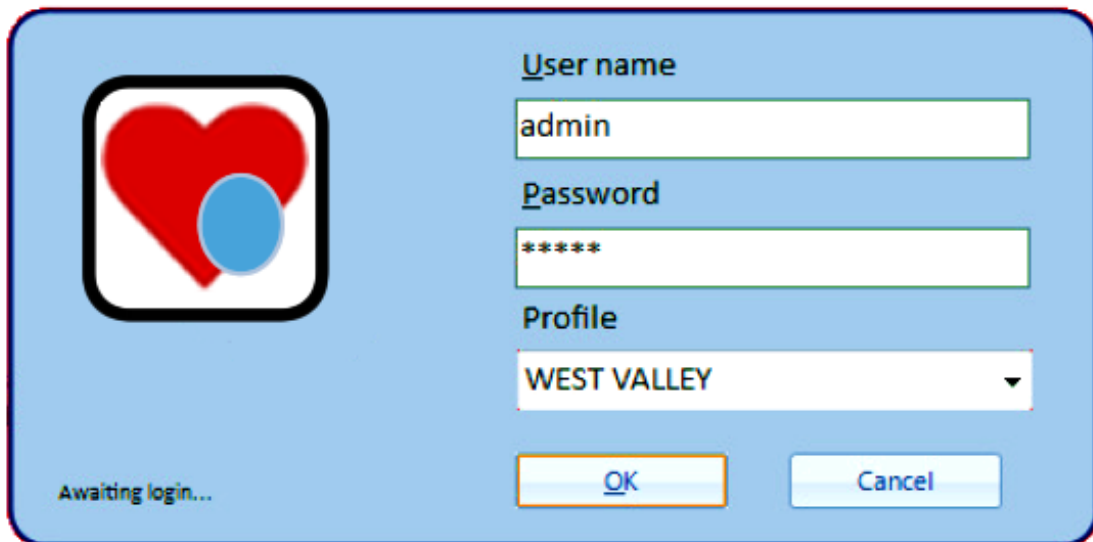
Our Kardia Website has a good deal of further information to illustrate what our clients are doing with Kardia and QuickBooks™ together; plus the following provides a very strong overview of Kardia so you may get a sense of the look and feel of the entire application. As well, we invite you to contact us with any questions. We love to discuss business operations and have years of experience configuring our software to solve all kinds of business needs and challenges.

## THE KARDIA BUSINESS SYSTEM

Once installed, you can launch the program by clicking on the desktop icon:



This will load the program and bring you to the login screen:



Awaiting login...

**User name**  
admin

**Password**  
\*\*\*\*\*

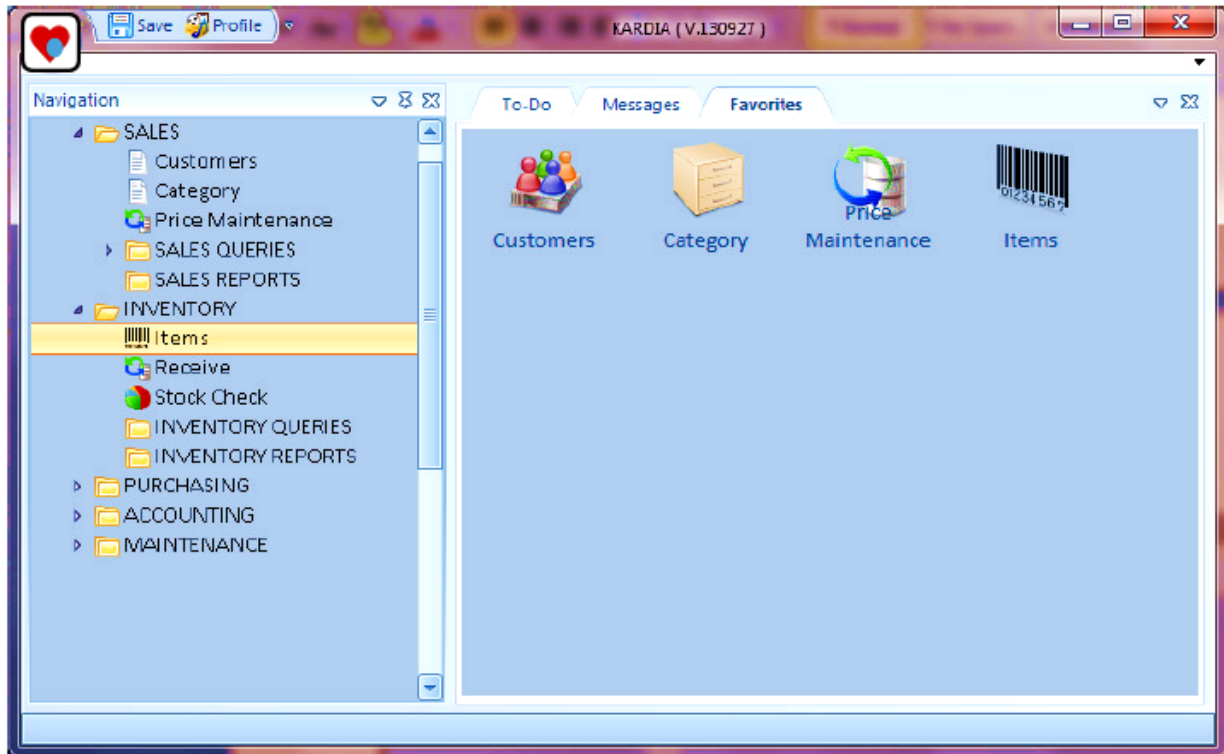
**Profile**  
WEST VALLEY ▼

OK Cancel

By default, the login is 'admin' for user name and 'admin' for password. These can be changed and additional logins can be created once you have logged into the system as an administrator. The Profile drop-down typically has just one option, however, it is possible to have multiple configurations within one Kardia installation, and the Profile drop-down would allow a user to select whichever ones they wanted. (For example, one might have an asset-tracking Profile as well as an order-entry Profile — a separate Profile is generally intended when there is a change to the underlying database that is being utilized.)

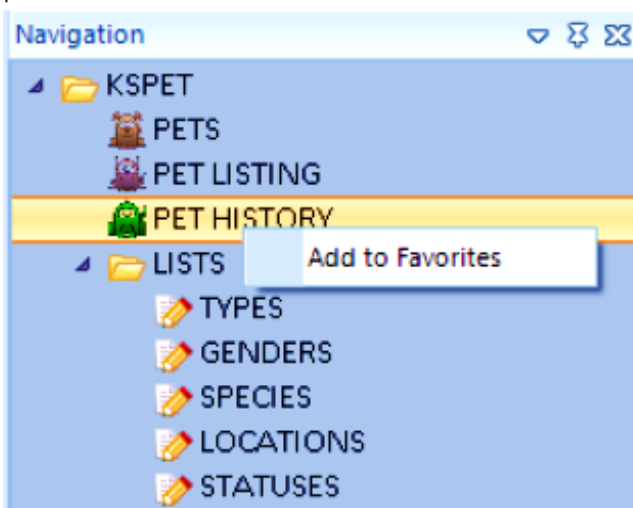
After successful login, you will be taken to the main menu.

## MAIN MENU



The main elements of the menu are:

- **Navigation Window** –



This window provides access to all of the functions of the application. It uses a 'tree structure' (similar to Windows Explorer) to drill down into logical menu groups as needed to find the function you require. Once located, you double-click it to launch that function.

- **Favorites Window (not shown) –**

This window will initially be blank for each new user. The user can populate the window by right-clicking an item in the Navigation window and selecting ‘Add to Favorites’ per the screen shot above. Once the icon appears in the Favorites window, the user no longer needs to find it in the Navigation window; they can launch it by clicking the icon in the Favorites window.

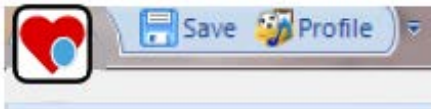
- **ToDo Window –**

To-Do Messages Favorites						
Task	DateCreated	Category	Sub-Category	Comments	Close	
Check Phone Messages	06/20/2016	SCHEDULER	OFFICE		Close	
Quarterly Sales Tax	06/20/2016	SCHEDULER	TAXES		Close	
Backup	06/23/2016	SCHEDULER	OFFICE		Close	
+					Close	

The system has the ability to schedule periodic tasks and—if any have been setup—they will appear in this window.

- **Messages Window (not shown) –**

- **The ‘Quick Access Toolbar’ (QAT) –**



Shown at the top left corner of the screen QAT provides two functions –

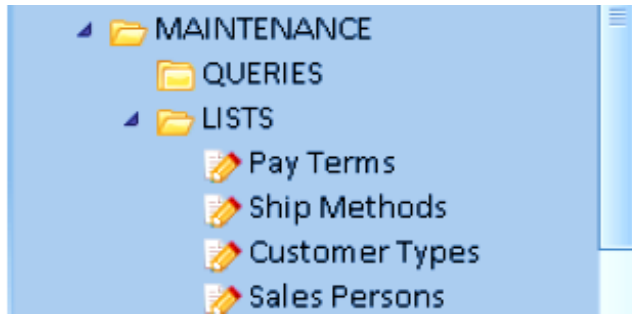
- **‘Save’** – Since you can move and size any of the above windows to fit your screen and preferences, the ‘Save’ button must be used if you wish to not lose any of your settings.
- **‘Profiles’** – For non-administrators, you can control your password and basic system settings. For administrators, you can add and maintain logons via the ‘Profiles’ function.

## KARDIA FORM TYPES

As you use Kardia, you will notice similarities from form to form. Kardia uses four basic form types, and once you understand what each form type does and how it works, then you have come a long way and are sure to know how any Kardia application works.

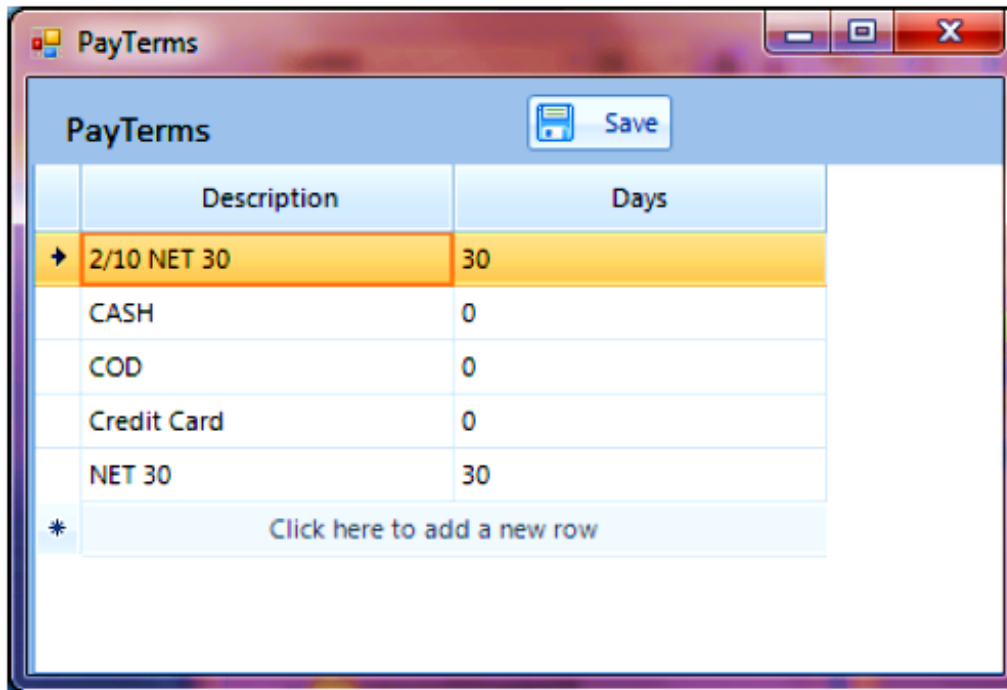
In the section that follows, the various form types are covered in a generic manner.

## LIST MAINTENANCE



Anywhere you see a drop-down list appear on a form, there is generally a List Maintenance form associated with it so that you can control the elements in the list. From your main menu, all of the List Maintenance forms generally appear in a 'MAINTENANCE' folder.

The sample list form below is for maintaining a list of 'Pay Terms,' but the features and functions of this form-type apply to all similar lists.

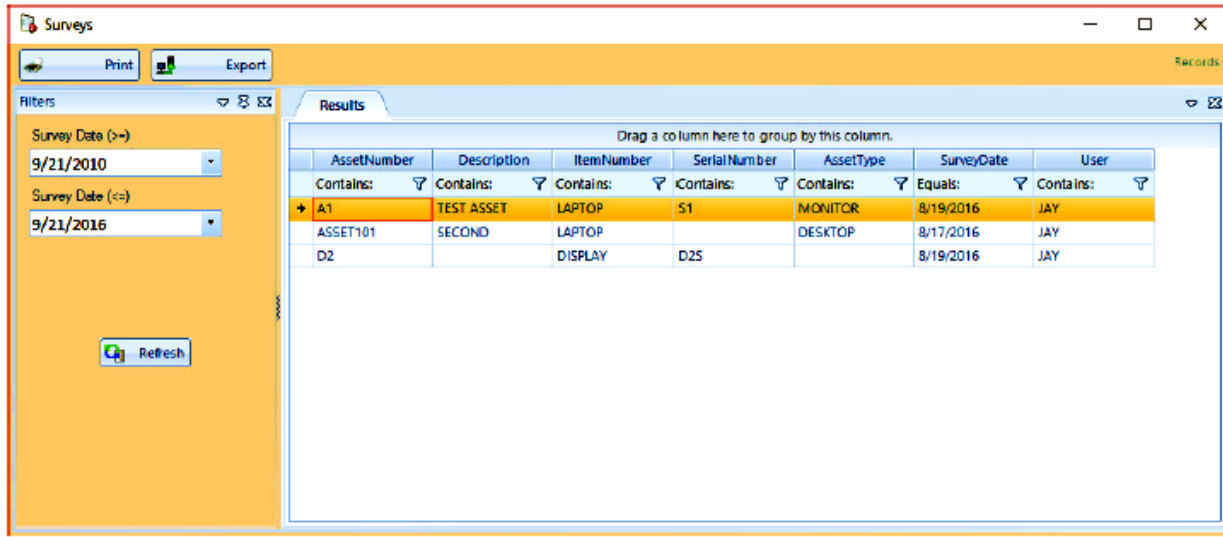


	Description	Days
→	2/10 NET 30	30
	CASH	0
	COD	0
	Credit Card	0
	NET 30	30
*	Click here to add a new row	

To add a new element in the list, simply click on the blank row at the bottom of the list (where it says 'Click here to add a new row'). You will then be able to enter data into each cell corresponding to the column header of that row. You may also edit any cell (except the Key Field for the list) by clicking in the cell and adjusting, as desired. And finally, if you wish to delete a row, then highlight it and press the 'DEL' key on your computer keyboard. If you need to edit the Key Field, you will need to delete it and then add the correct value a second time.

When you are done adding, editing or deleting, press the 'Save' button at the top of the form.

## QUERY FORMS



Query Forms display data in a familiar ‘spreadsheet like’ format. Query Forms can be configured to show single-table or multi-table data in simple rows and columns.

The left-side window allows you to enter filters that are applied to the underlying data-source prior to hitting the ‘Refresh’ button. For example, if you have a table of 1 million records, you probably don’t need to browse through the entire table. You can enter a filter to help you narrow the selection and then hit ‘Refresh’ to run the query and display the results.

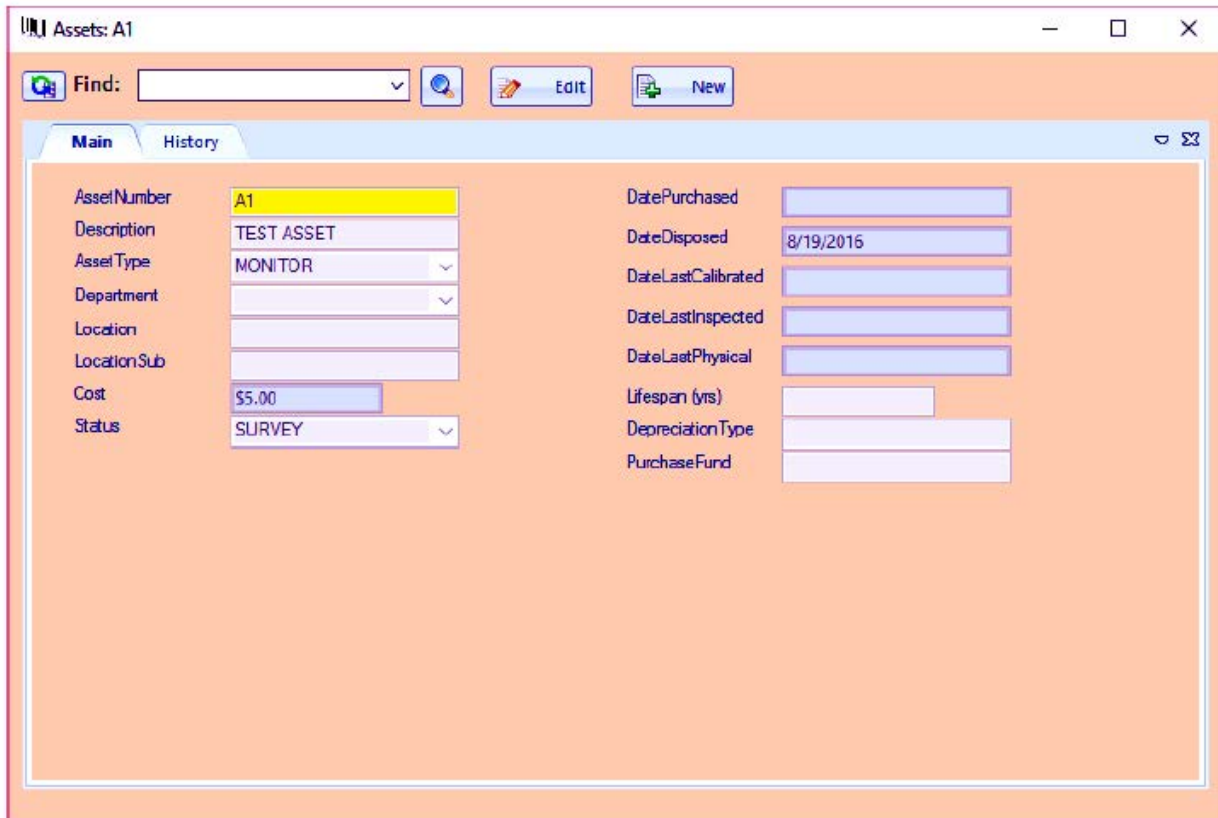
The right-side window shows the results. Based upon the specific query form you are using, the name and number of columns will vary.

Here are some features of Query Forms—

- **Editing** — Columns can be configured to be edited based upon user permissions, if desired.
- **Sorting** — You can click on any column header to sort the data by that column. Clicking once sorts ascending, clicking again sorts descending and clicking a third time resets to the original, unsorted format. You can sort on multiple columns by just holding down the CTL key on your computer keyboard and then click on any additional column headers in the order you wish to sort them.
- **Grouping** — Some Query Forms are configured to allow grouping. Grouping allows you to group records by a specific column. If grouping is enabled, you will see the ‘Drag a column here to group by this column’ area on the results pane. This allows you to click and drag the column header you wish to group to that area, and the results will be grouped on that column. You can also group on multiple columns by simply repeating the process. To un-group, just click the ‘x’ on the group icon that appears in the grouping region.
- **Filtering** — In addition to the pre-refresh filter, you can filter after the refresh just as easily as if the Query Form has it enabled. The filter row will appear underneath each column header. Also, you can start typing in the filter box and instantly, you will see the result-sets filtered with each keystroke. The default is a ‘contains’ filter which hides any records that do not have the typed characters in the column you are filtering. Use the drop down for other filter types, such as >, =, NULL, etc.

- **Export** — You can click the export button and the results will be exported to Excel. You will need to have Excel installed on your PC for this to be of value. Excel provides a familiar environment for many users and this is a quick way to create ad hoc reports.
- **Print** — The print button will output the results to a printer. This is helpful for a quick, hard copy reporting of the data.

## TABBED FORMS



The screenshot shows a web application window titled "Assets: A1". At the top, there is a "Find:" search box with a magnifying glass icon, an "Edit" button, and a "New" button. Below this is a tabbed interface with "Main" and "History" tabs. The "Main" tab is active and displays a form with the following fields:

Asset Number	A1	Date Purchased	
Description	TEST ASSET	Date Disposed	8/19/2016
Asset Type	MONITOR	Date Last Calibrated	
Department		Date Last Inspected	
Location		Date Last Physical	
Location Sub		Lifespan (yrs)	
Cost	\$5.00	Depreciation Type	
Status	SURVEY	Purchase Fund	

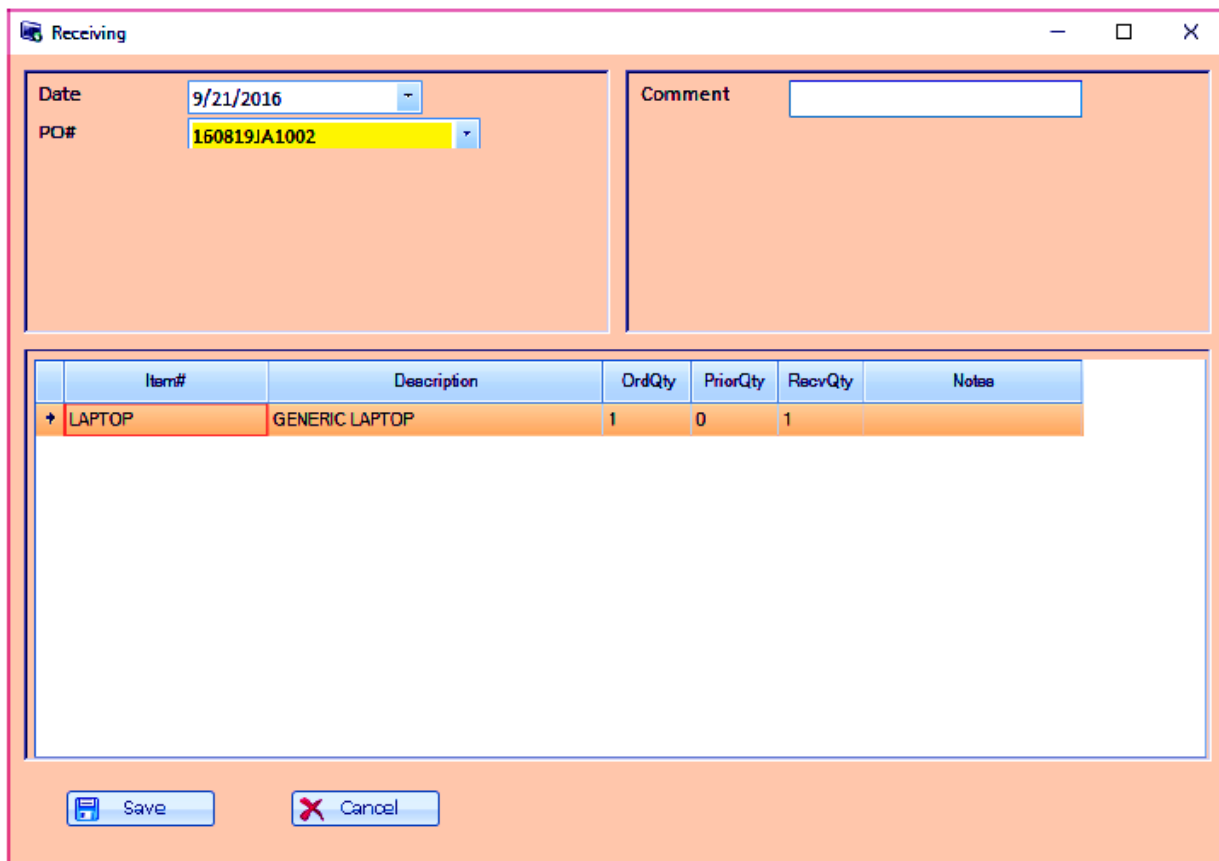
Tabbed forms allow for maintaining key information on objects that generally have too much data to show on one form (like inventory items, sales orders, purchase orders.) The forms can be configured to compile data from a variety of sources and provide hyperlinks to allow for drill down.

Here are some functions and features of Tabbed Forms —

- **Find** — The Find Box at top left will have focus when the form is opened. You generally then begin typing whatever information you know to find the Record for which you are looking. Often the drop-down is a limited list of those Records that will be most in demand, but the search button (the one with the magnifying glass) can be configured to open a Query Form to help with 'tougher to find' records.

- **New / Edit / Undo / Save** — Only two of these buttons will be visible at any time. Edit / New work together. Edit will open the fields for editing for the current Record. New will clear the form for adding a new Record. Once the form is in ‘Edit’ mode, then Undo / Save work together. ‘Undo’ allows you to cancel whatever ‘Edits’ or additions you have made. ‘Save’ locks any changes to the database.
- The Forms will generally have two or more Tabs on which you can click to view fields under each Tab. Fields include Text Boxes, Check Boxes, Drop-Down Boxes, Grids, Pictures and Buttons that can link to other Forms or Functions.

## TRANSACTION FORMS



Item#	Description	OrdQty	PriorQty	RecvQty	Notes
+ LAPTOP	GENERIC LAPTOP	1	0	1	

Transaction Forms are generally geared for more complex transactions, where an Omni Form may prove too cumbersome or confusing. Transaction Forms can be simple, single-field forms or multi-column forms with grids.

The only constants on every Transaction Form are the ‘Save’ and ‘Cancel’ buttons. Once you enter the data called for on the Form, pressing ‘Save’ will post the transaction to the database and update multiple tables within ‘commit’ / ‘rollback’ transactions.