



**Priority Business Checks**  
7225 Bermuda Rd. Ste.B  
Las Vegas, NV 89119

**Main Phone 702.263.2435**  
**Toll Free 800.240.0305**  
**Fax 702.263.2436**

# *User Manual*

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*Document Version 1.6*

## PBChecks.com Database

Prepared for:  
**Priority Business Checks**  
7225 Bermuda Rd. Suite B  
Las Vegas, NV 89119

June 13, 2006

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## Table of Contents

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<b>1. Introduction.....</b>	<b>3</b>
<b>2. User Types .....</b>	<b>4</b>
2.1. User .....	4
2.2. Manager .....	4
2.3. Administrator .....	4
<b>3. Log In Procedure .....</b>	<b>5</b>
<b>4. Create a New Order.....</b>	<b>6</b>
<b>5. Enter Customer Data .....</b>	<b>7</b>
<b>6. Branch Information.....</b>	<b>8</b>
<b>7. Account Number .....</b>	<b>9</b>
<b>8. Pick Item.....</b>	<b>10</b>
<b>9. Completion and Submission .....</b>	<b>11</b>
<b>10. Reorder/Quick Reorder .....</b>	<b>12</b>
<b>11. Canceling Orders.....</b>	<b>14</b>
<b>12. Saving Pending Orders .....</b>	<b>15</b>
<b>13. Continue or Change an Order .....</b>	<b>16</b>
<b>14. Quick Find an Order.....</b>	<b>17</b>
<b>15. View Active Orders .....</b>	<b>18</b>
<b>16. Select Other Branch .....</b>	<b>19</b>
<b>17. Search Bank History .....</b>	<b>20</b>
<b>18. View Product List.....</b>	<b>21</b>
<b>19. Printing.....</b>	<b>22</b>
<b>20. Viewing vs. Editing.....</b>	<b>23</b>
<b>21. Getting Help .....</b>	<b>24</b>
<b>22. Glossary .....</b>	<b>25</b>



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## 1. Introduction

---

This document provides instructions for using the web-based database for PBChecks.com. In the following document, I will briefly describe each of the following topics:

- Supported Users – who will be using the system
- Completing Tasks – description of how to complete tasks in the database
- Glossary – words used in this document with their definitions

*Please be aware that this software is in the implementation stage of development, we encourage your feedback and request you report any glitches you encounter.*

*Thank you for your patience as we work together toward success.*



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## ***2. User Types***

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This section describes the types of users who will use the database.

### ***2.1. User***

The standard User has access to read-only functionality of the database in that they can view data, but not change them. They have access to all primary sections of the database.

### ***2.2. Manager***


The Manager-level user has access to the full functionality of the database in that they can view and edit data. They have access all sections of the database.

### ***2.3. Administrator***

The Administrator-level user has access to the full functionality of the website in that they can view and edit data, administer user accounts and privileges, and edit layouts. They have access to all sections of the database.

### 3. Log In Procedure

Open Internet Explorer  and go to [www.pbchecks.com](http://www.pbchecks.com)

Address:  <http://www.pbchecks.com/>

Click on the LOG IN button 

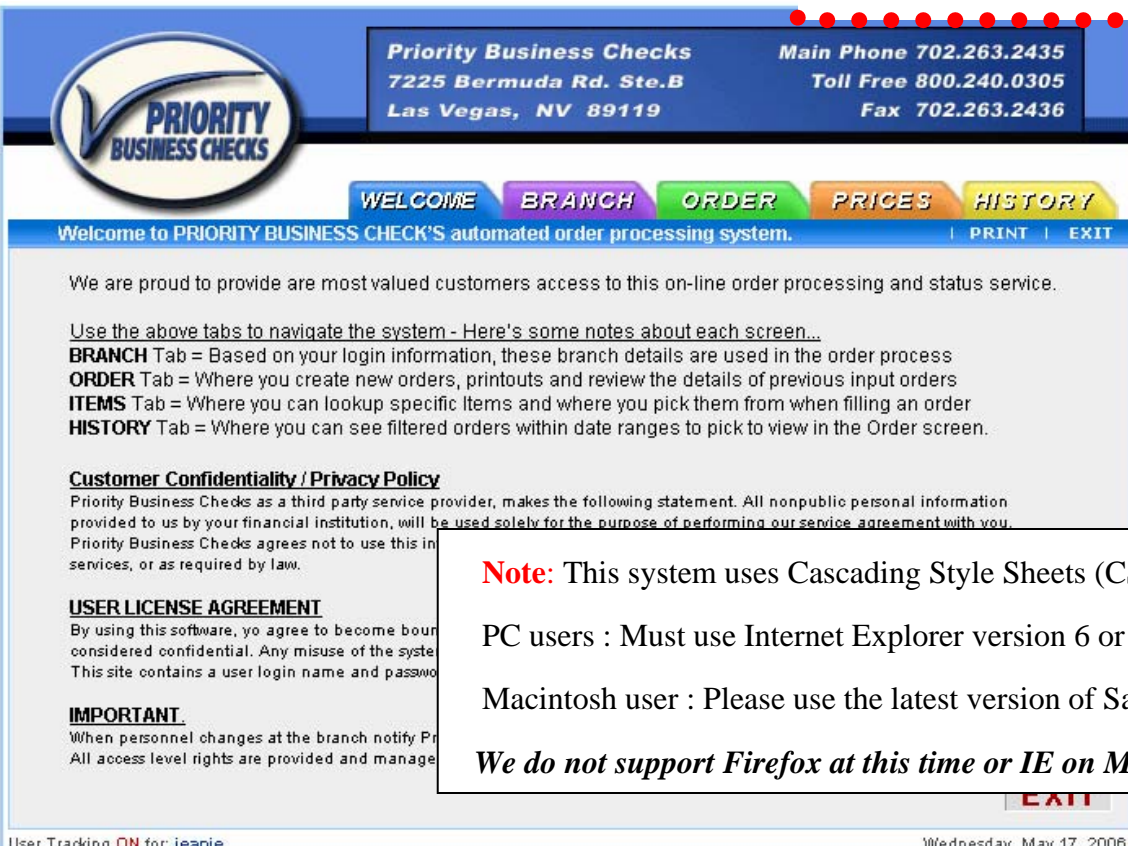
Type in your Login information provided by PBChecks

Name:

Password:

and click Log In 

**WARNING** : Do NOT share your login name and password with anyone! You can and will be held personally responsible for any changes made under your name in the system.



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**WELCOME** **BRANCH** **ORDER** **PRICES** **HISTORY**

Welcome to PRIORITY BUSINESS CHECK'S automated order processing system. | PRINT | EXIT

We are proud to provide are most valued customers access to this on-line order processing and status service.

Use the above tabs to navigate the system - Here's some notes about each screen...

**BRANCH** Tab = Based on your login information, these branch details are used in the order process

**ORDER** Tab = Where you create new orders, printouts and review the details of previous input orders

**ITEMS** Tab = Where you can lookup specific Items and where you pick them from when filling an order

**HISTORY** Tab = Where you can see filtered orders within date ranges to pick to view in the Order screen.

**Customer Confidentiality / Privacy Policy**  
Priority Business Checks as a third party service provider, makes the following statement. All nonpublic personal information provided to us by your financial institution, will be used solely for the purpose of performing our service agreement with you. Priority Business Checks agrees not to use this information for any other purpose, except as required by law.

**USER LICENSE AGREEMENT**  
By using this software, yo agree to become bound by the following terms. All information provided to this system is considered confidential. Any misuse of the system will be reported to your financial institution. This site contains a user login name and password.

**IMPORTANT**  
When personnel changes at the branch notify Priority Business Checks. All access level rights are provided and managed by Priority Business Checks.

User Tracking **ON** for: jeanie

Wednesday, May 17, 2006

**Note:** This system uses Cascading Style Sheets (CSS)

PC users : Must use Internet Explorer version 6 or above



Macintosh user : Please use the latest version of Safari

**We do not support Firefox at this time or IE on Macs**

(The Welcome screen will appear)

#### 4. Create a New Order

---

On the  screen, click the  banner button.

## 5. Enter Customer Data

---

Once the cursor starts blinking in the “CK Name” field, begin to type the check name. Using the **TAB** key to move to the next field and continue to enter all the applicable information.

*(Note: Refrain from hitting the “return” key on your keyboard, if you do, simply use the backspace key to move back up within the field)*

Once all of the contact information is fully entered into the appropriate fields, you may click the  button to auto-fill the “**Ship To**” address if the it is the same as the CK address or the  button to auto-fill the Branch contact information.

To fill the “**Bill To**” address fields, click the button that corresponds to where the bill should be sent.     For example, click “Customer” and the fields will auto-fill with the contact information in the fields above; if you click “Bank,” then the bank’s contact info will auto-fill into those fields.

*(Note: After you select the “Bill To” recipient and the information automatically fills the fields, the header next to the “Bill To” field shows the type of recipient)*



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## 6. Branch Information

---

The associated Branch's information, based on your login name will be automatically be replicated into the Trans / Route #

Trans / Route #

**A123456789**

(not alterable) and the leading digits of

the Account Number **A 03** will also be placed in to the Account Number field.

*(Note: If you are submitting an order for another Branch in your Bank, you will need to manually enter the correct leading digits in the Account Number field)*



## 7. Account Number

After entering the remaining digits of the Account Number, click the “**Validate**” button    . If there is a problem with the data, a banner with red text will appear with instructions for correcting the issue.




(Note the red-text banner indicating the problem with Validation)

Make any necessary changes and then click Validate again. Repeat these steps until the data passes validation, you will know the information passes if the banner does **not** appear.

*Note: The system will not accept the submission of your order unless it passes the Validation process.*

## 8. Pick Item

Next, move down to the Order Item section to order checks or the Deposit Slips section to order deposit slips. Use the **PICK / Item#** buttons to choose an item, which will take you to the Items page:



Item Number	Quantity	Product Full Description	Price
226			
227 STGPS	150	START SET 1 PT. GENERAL PURPOSE CHECKS	56.50
228 STGPS2	150	START SET 2 PT. GENERAL PURPOSE CHECKS	71.80
229 STAPS	150	START SET 1 PT. ACCOUNTS PAYABLE CHECKS	56.50
230 STAPS2	150	START SET 2 PT. ACCOUNTS PAYABLE CHECKS	71.80

Click on the item to select it and you will automatically be returned to the Order screen with the selected item and its default values filled in (ie: starter sets get deposit slips, a stamp etc.)

If ordering checks on a new Account enter a starting number that is **1001** or higher into the “**Start #**” field.  You must click the little down arrows to choose other valid values for your selected item such as: Color, Position, Style, etc.

**BUSINESS CHECKS**

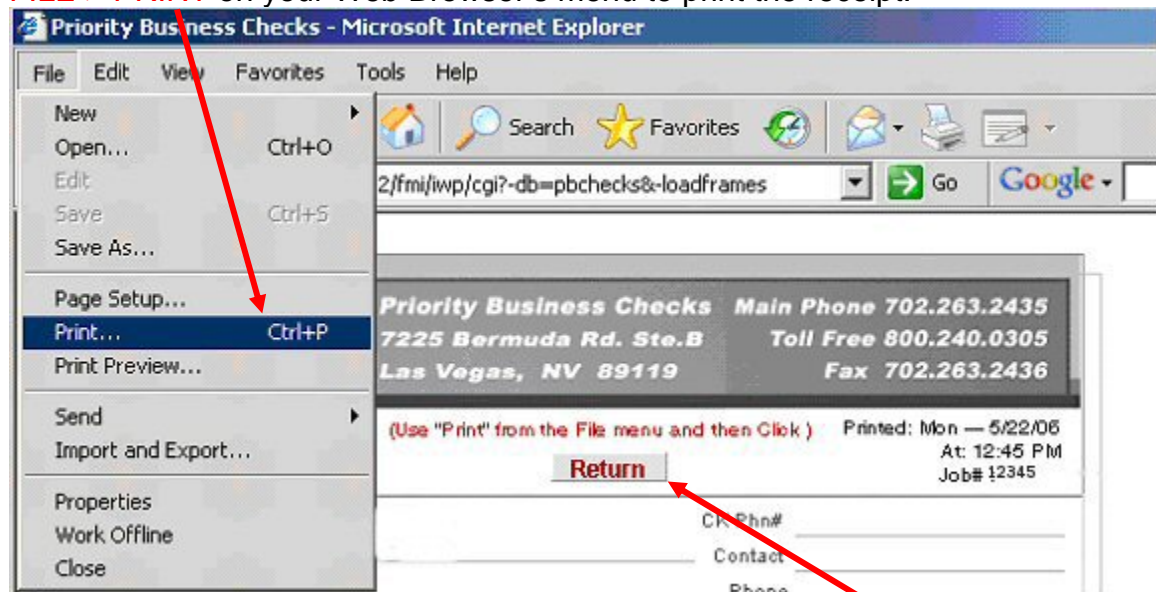
<b>PICK / Item#</b>	<input type="text" value="STLSREND"/>	Quantity	<input type="text" value="150"/>
<b>Desc</b> <input type="text" value="STARTER SET 1 PT. LASER CHECKS W/2 PT. DEPOSIT SLIPS"/>			
<b>Start #</b>	<input type="text" value="1001"/>	<b>Software</b>	<input type="text" value="Quick/ Pro/ Premier"/>
<b>Color</b>	<input type="text" value="Green"/>	<b>Style</b>	<input type="text" value="Gen. Purpose"/>
<b>Position</b>	<input type="text"/>	<b>Reorder</b>	<input type="text" value="New Order"/>
<b>Two Lines</b>	<input type="text" value="No"/>	<b>Custom Logo?</b>	<input type="text"/>
<b>Sig Line Print</b>	<input type="text"/>	<b>LogoStock</b>	<input type="text"/>

## 9. Completion and Submission

When you finish entering the details and you want to complete and submit the order for processing, you must click the **Submit** button in the lower right corner, to actually submit the order to PBChecks for processing.

*(Note: If the receipt printout screen does not appear, note the red banner text that will display why the validation did not pass)*

You will be presented with the Order Receipt screen, Choose **FILE > PRINT** on your Web Browser's menu to print the receipt.



(Web Order Receipt View)

When you're done printing from this screen, click on the **Return** button or anywhere on the screen to go back the order view.

Review the printed receipt and confirm information. When you are reviewing the receipt, and catch an error, then you may alter the order and then you **MUST** click the submit button again and print a new receipt with the corrected info. *(shred the old one) THEN....*

**FAX the receipt to the PBCheck (Fax number at top)**

**Note:** The status of your order will now be

Status **Submitted**

You may alter the order until PBCHECKS set it to "Production." Once the status is changed it is "View-only" and not alterable.

**IMPORTANT!** When altering a previously submitted order you **MUST** click **"Submit" AGAIN** & Print & Fax the corrected order.

## 10. Reorder/Quick Reorder

There are 2 ways to place a reorder – either **Reorder/Edit** (which copies the customer account details into a new order) or **QuickReorder** (which copies the customer account details and the product details of the previous order). See below for the instructions for using the Reorder or Quick Reorder features.

### Reorder:

To create a new order with **all of the customer account details** – Start by finding the order that you would like to reorder.

Once you are viewing the correct order, On the **ORDER** screen, click the **Reorder/Edit** banner button. All of the order details will be copied into a new order.

The customer account details will be duplicated into a new order & you will see a flag appear on the screen:

**ReOrder Created / Continue to fill in product information**  
 BANK INFO SPECIAL INSTRUCTI

Fill in the product and billing information for this reorder.

When you finish entering the details and you want to complete and submit the order for processing, you must click the **Submit** button in the lower right corner, to actually submit the order to PBChecks for processing.

*(Note: If the receipt printout screen does not appear, note the red banner text that will display why the validation did not pass)*

You will be presented with the Order Receipt screen, Choose **FILE > PRINT** on your Web Browser's menu to print the receipt.

When you're done printing from this screen, click on the **Return** button at the top of the screen to go back the order view.

Review the printed receipt and confirm information. When you are reviewing the receipt, and catch an error, then you may alter the order and then you **MUST** click the submit button again and print a new receipt with the corrected info. (shred the old one) **THEN....**

**FAX the receipt to the PBCheck (Fax number at top)**

**Quick Reorder on the next page:**

### Quick Reorder:

To create a new order with **all of the same customer account and product details** –

Start by finding the order that you would like to reorder.

Once you are viewing the correct order, On the **ORDER** screen, click the **QuickReorder** banner button. All of the order details will be copied into a new order.

The order will be duplicated & you will see a flag appear on the screen:

**ReOrder Created / Please Enter the Start Number & Billing Info.**  
 BANK INFO SPECIAL INSTRUCTIONS

Fill in the Start Number & Billing info for this reorder.

When you finish entering the details and you want to complete and submit the order for processing, you must click the **Submit** button in the lower right corner, to actually submit the order to PBChecks for processing.

*(Note: If the receipt printout screen does not appear, note the red banner text that will display why the validation did not pass)*

You will be presented with the Order Receipt screen, Choose **FILE > PRINT** on your Web Browser's menu to print the receipt.

When you're done printing from this screen, click on the **Return** button at the top of the screen to go back the order view.

Review the printed receipt and confirm information. When you are reviewing the receipt, and catch an error, then you may alter the order and then you **MUST** click the submit button again and print a new receipt with the corrected info. *(shred the old one) THEN....*

**FAX the receipt to the PBCheck (Fax number at top)**



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## 11. Canceling Orders

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You may cancel an order up to the point it is in Production by clicking the **Cancel** button at the bottom right corner. This will clear all the entered information and stop the order process.

*(NOTE: We can NOT undo a canceled order, all info is cleared)*





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## 12. Saving Pending Orders


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Use the **Save** to hold an open order in the case of additional information requirements (DO NOT SUBMIT) simply leave it as a “Web Order” to complete later. Follow the next section to find, complete and Submit a saved order.

### 13. Continue or Change an Order

You may alter an order as long as the Status is *not* "Production." Once the status is changed by PBChecks it is view-only, and cannot be altered.

To Edit an order, first find the appropriate order thru the branch's active orders list or use the quick find method. (see next section) If the Order Status is *not* listed as "Production," you can edit the order. Just click in the field that you wish to change and make the corrections. Remember, if the order has been previously submitted you must click **Submit** **AGAIN** to print a new receipt and Fax to PBCHECKS to resubmit a corrected order.

**Note:** If you need to make a change to an active order after the status has changed to "Production,"  there is a possibility (but no guarantee) that the order can be changed before it goes to print, if you call Priority Business Checks IMMEDIATELY at the contact number listed at the beginning of this document. A staff person *may* be able to make the changes for you, or change the status of the order so that you can go in and make the required changes.




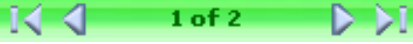
## 14. Quick Find an Order

---

While on the ORDER screen, click the  banner button to enter in to find mode.


Once in find mode, enter the search criteria in the appropriate field (for example, you can enter an order number in the "Order #" field or the customer's name in the CK Name field or the Account#, etc.).

Then, click the  banner button to execute the find.

If more than one record is found use the arrow buttons to navigate - see the count information in the banner .

## 15. View Active Orders

Click on the **BRANCH** tab to see your ACTIVE orders.  
 You can review the status of the order by going to the branch screen and looking at the active order list on the bottom half of the screen. Click on any text item associated with that order to go to the order details page and view the orders additional details.




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WELCOME
BRANCH
ORDER
PRICES
HISTORY

2 of 6
FIND ALL
PRINT | EXIT

<b>Bank Name</b>	Test Bank	<b>Contact</b>	
Address 1	Sample Branch	Phn / Ext	(702)
Address 2	2320 EAST	Phone/Fax	
City, ST, Zip	Las Vegas NV 89119-7502	Bank Logo	
<b>Billing</b>			
Address 1			
Address 2			
City, ST, Zip	LAS VEGAS NV 89103		
<b>Bank #'s</b>	A. Branch A	<b>Fraction</b>	Disc% 20%

Order Date	Ref#	Ordered by	Name on Check	Active Status	Updated
3/27/06				Picked Up	5/17/06
7/20/05				Picked Up	5/17/06

*(Note: the most recent order is the first on the list.)*



## 16. Select Other Branch

To see the active orders for other *Branches* in your bank, or orders you input for a client with a different branch, while on the Branch screen click the **BRANCH** tab **AGAIN** see to see the associated branches list.

Branch#	Bank Name	Address	City	Phone
1 A 003	Test Bank	7280	LAS VEGAS	
2 A 001	Test Bank	T	Las Vegas	(702)
3 A 004	Test Bank	1811 E	CARSON CITY	
4 A 002	Test Bank	6085	LAS VEGAS	
5 A 005	Test Bank	1887	MINDEN	

*(When you click on the Branch tab twice, a list of all associated branches appears)*

You can then click on any line to view the selected branch's Active order list, or Click the Branch tab again to go back to the original Branch View screen.

**PRIORITY BUSINESS CHECKS**  
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WELCOME BRANCH ORDER PRICES HISTORY

2 of 6 FIND ALL | PRINT | EXIT

Bank Name **Test Bank** Contact


Address 1 Sample Branch Phone (Ext) (702)

Notice that the found record count reflects the active branch count of the bank in the header. **2 of 6** Use the arrows to navigate thru the branches as desired. You may also toggle back to the active branch list and chose the branch and select to return.

## 17. Search Bank History


You may also find archived orders by going to the **HISTORY** tab to view a list of BANK orders, filtered by their current status.

Set the Date Range **Date From** 6/11/2005 **To** 10/9/2005 and simply click the **ALL** button to see all orders with any status for the selected date range and the **Active** button to see all active.

<div style="display: flex; align-items: center; justify-content: space-between;">  <div style="text-align: center;"> <b>Priority Business Checks</b>        7225 Bermuda Rd. Ste.B        Las Vegas, NV 89119     </div> <div style="text-align: right;">       Main Phone 702.263.2435        Toll Free 800.240.0305        Fax 702.263.2436     </div> </div>						
<div style="display: flex; justify-content: space-around; font-weight: bold;"> <span>WELCOME</span> <span>BRANCH</span> <span>ORDER</span> <span>PRICES</span> <span>HISTORY</span> </div>						
Status: <b>ALL</b>	<b>Active</b>	<b>ALL</b>	Date From: 3/18/2006	To: 7/16/2006	<b>SUBMIT</b>	Print
Ordered	Status	Company / Name on CK	Branch	Job #	Balance	
Wed 3/22/06	SHIPPED	NEW IMAGE	A 00		\$ 0.00	
Thu 3/23/06	SHIPPED	DAVID	A 00		\$ 0.00	
Thu 3/23/06	SHIPPED	AZ	A 00		\$ 0.00	
Fri 3/24/06	PICKED UP	EXECUTIVE	A 00		\$ 0.00	
Mon 3/27/06	PICKED UP	EXECUTIVE	A 00		\$ 0.00	
Mon 3/27/06	PICKED UP	ENVIRON			\$ 32.22	
Mon 3/27/06	SHIPPED	LUCKY	A 00		\$ 0.00	

(All orders or varying Status)

Or, set the Date Range and select a specific **Status** in the drop-down box on the banner **Shipped** and then click **SUBMIT** to find all orders with that status.


<div style="display: flex; align-items: center; justify-content: space-between;">  <div style="text-align: center;"> <b>Priority Business Checks</b>        7225 Bermuda Rd. Ste.B        Las Vegas, NV 89119     </div> <div style="text-align: right;">       Main Phone 702.263.2435        Toll Free 800.240.0305        Fax 702.263.2436     </div> </div>						
<div style="display: flex; justify-content: space-around; font-weight: bold;"> <span>WELCOME</span> <span>BRANCH</span> <span>ORDER</span> <span>PRICES</span> <span>HISTORY</span> </div>						
Status: <b>Shipped</b>	<b>Active</b>	<b>ALL</b>	Date From: 3/18/2006	To: 7/16/2006	<b>SUBMIT</b>	Print
Ordered	Status	Company / Name on CK	Branch	Job #	Balance	
Wed 3/22/06	SHIPPED	NEW IMAGE	A 00	37	\$ 0.00	
Thu 3/23/06	SHIPPED	DAVID	A 003	1	\$ 0.00	
Thu 3/23/06	SHIPPED	AZ	A 00	37	\$ 0.00	
Mon 3/27/06	SHIPPED	LUCKY	A 00	3	\$ 0.00	
Tue 3/28/06	SHIPPED	HONG		3	\$ 0.00	
Wed 3/29/06	SHIPPED	HONG		35	\$ 0.00	

(Shipped Status orders only)



## 18. View Product List

To View a list of available products, click on the **PRICES** tab. On this screen, you can choose a category of products to view by picking the **Category** **Choose Category -->** **Starter Set** in the drop down field and then clicking **Submit** **SUBMIT**.



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STARTER SETS INCLUDES - CHECKS, DEPOSIT SLIPS, ENDORSEMENT STAMP AND OR COVER

WELCOME
BRANCH
ORDER
**PRICES**
HISTORY

Choose Category --> **Starter Set**

**SUBMIT** <-- And Click

| PRINT | EXIT

Item Number	Quantity	Product Full Description	Price
226			
227	<b>150</b>	START SET 1 PT. GENERAL PURPOSE CHECKS	56.50
228	<b>150</b>	START SET 2 PT. GENERAL PURPOSE CHECKS	71.80
229	<b>150</b>	START SET 1 PT. ACCOUNTS PAYABLE CHECKS	56.50



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## 19. Printing

After Clicking PRINT on any screen, a report will appear on your screen. Go to your Web Browser's menu and choose "File" > "Print." Be sure to enter the printable page length i.e.: 1 of 1 on the History report or it will print many blank pages.

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(Use "Print" from the File menu and then Click )		Printed: Mon — 5/22/06 At: 12:45 PM Job#: 12345	
<a href="#">Return</a>			
CK Name	RANCHERO VISTA		
Co / Line2			
Address	911 N.	CK Phn#	
City/ST/Zip	LAS VEGAS NV 89128	Contact	
Ship To	911 N.	Phone	
	LAS VEGAS, NV 89128	Fax	
Bill To	911 N.		
	LAS VEGAS NV 89128		
<b>BANK INFO</b>		<b>ORDER INFO</b>	
Bank Funn Name	BUSINESS	Status	Submitted
Trans / Route #	A	Order #	
Account Number	A	Date	Thu-5/18/06
<b>SPECIAL INSTRUCTIONS</b>		Time	8:49 AM
Please describe the changes:			

(Web Order Report Print View)

When you're done printing from this screen, click on the small [Return](#) button or anywhere on the screen to get back.

**WARNING!!**  
**DO NOT CLICK THE BACK ARROW IN YOUR WEB BROWSER!**



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## 20. Viewing vs. Editing

When viewing a record (above) note how there are not lines between the ship to address and the special instructions background is grey. When you click in to any field (below) and the record is editable, highlights / outlines will appear around the fields and the special notes background is white, etc.



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## 21. Getting Help

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If you're not sure what a certain button does, hover the mouse over the button and within 2 seconds a small pop-up note will specify what that button will do.

If you need *help with your order* call 702-263-2435 or 800-240-0305. If you need *technical support* regarding the online ordering system, call 702-425-8592.



## 22. Glossary



*(Banner and Tab color match indicates the current screen/ module you are viewing.)*

**Tabs:** Use top tabs to navigate through the different modules. It will automatically select the related records from the current record you are coming from.

**Banner Buttons:** Use banner buttons to perform actions that affect the display data.

**Fields:** store data; headers for the field are above or beside the field.

City/ST/Zip	LAS VEGAS	NV	89123
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**Record Navigation Buttons:** First – Previous – Next – Last



**Portal List:** Banner color of the portal list indicates the module that the related records are being displayed from. For example, in this screen (**below**) you can see that the data in the portal list is green, therefore that information is coming from the Order module (the Order tab is also green.)

Order Date	Ref#	Ordered by	Name on Check	Active Status	Updated
9/30/05			Arm	Production	9/30/05
9/30/05			Inte	Production	9/30/05
9/30/05			Works	Production	9/30/05
9/30/05			B &	Production	9/30/05
9/27/05			Ran	Production	9/27/05
9/20/05			The	Production	9/30/05