The Finance Shop

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The Finance Shop (TFS) provides finance and leasing brokers with a comprehensive finance application management solution.

TFS provides all the key features required to manage clients and their finance applications. From initial quote to the completion of the application.

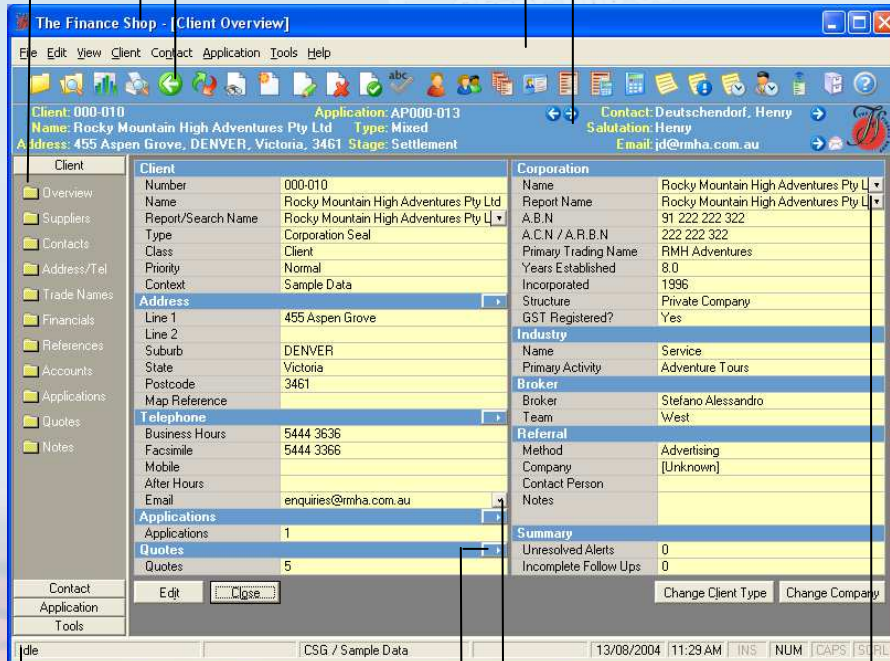## The Finance Shop [Client Overview] Screen

The sidebar provides one-click mouse access to most TFS screens

The title bar displays the name of the current screen

The menu bar provides the menus to access all functions of TFS.

The toolbar provides one-click mouse access to the features you use most often

The context bar provides overview information about the selected client, application, and client contact

The status bar displays the current user, date, time and activity

Automatically create a new email

Links to a related screen

Scrolls through pre-defined combinations for selection

Quick Procedures

To Do These Tasks	Do This
Select a Client	Press F3 or click
Search for a Client	Press F4 or click
Add new Client	Press F8
Add new Application	Press CTRL + F8
View a list of reports	Press CTRL + R or click
Print Preview	Click
Re-Read & Refresh Data	Press SHIFT + F5 or click
View Client Overview	Press CTRL + T or click
View a Client's Contacts	Click
View a Client's Applications	Click
View the Application Overview	Press CTRL + A or click
View the Application Calculations	Press CTRL + L or click
Open the Quick Calculator	Press F11 or click
View Comments	Press F7 or click
Add a New Comment	Press CTRL + F7
View Alerts	Press F6 or click
View Follow Up	Press F9 or click
View Personal Follow Up	Press SHIFT + F9 or click
Launch SmartLodge	Press CTRL + S or click
Launch TFS Administration	Click
Launch TFS SmartCampaign	Click
View Help Guide	Press F1 or click

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The Finance Shop

Standard Toolbars

- Selects a client
- Searches for a client
- Open Reports
- Print Preview

- Views a selected item
- Adds a new item
- Edits a selected item
- Deletes a selected item
- Spell Check
- Set item as primary

- Returns to the previous screen
- Refreshes the data on a screen

- Client Applications
- Client Contacts
- Client Overview
- Comments
- Application Overview
- Calculations
- Quick Calculator
- Personal Follow Up
- Follow Up
- Alerts
- SmartLodge
- Launch TFS Administration
- Launch SmartCampaign
- Help

Keyboard Shortcut Keys

To Do These Tasks	Use These Keys
Open a popup dialog	ENTER
Move forward through the fields in a grid	TAB
Move backward through the fields in a grid	SHIFT + TAB
Move to the top of a list	HOME
Move to the bottom of a list	END
Move to the list item above	↑
Move to the list item below	↓
Select a control such as a button	ENTER
Close a menu, dialog or screen	ESC
Toggle between open applications	ALT + TAB
Close The Finance Shop	ALT + F4

Miscellaneous Shortcuts/Options

To Do These Tasks	Do This
Select from a list of items known by TFS	Click
Search for entered characters anywhere within the field	Click
Clear search criteria	Click
Select from a drop-down list	Click
Scroll through the items in a list	Click
Send an email to the current client contact or entity	Click
Solve an application calculation	Click Solve
Jump to a related screen	Click