



# PowerView

Client-Project-Contact export/modify utility



## From CLI - the Time & Billing Specialists

- **Choose fields to be displayed** — all relevant fields in the client, project, or contact database are available.
- **Enter selection criteria** — use several criteria to find exactly what you want.
- **Populate on-screen grid** — then rearrange and sort your data by drag & drop of column headings.
- **Export to common file formats** — for further manipulation, reporting, or merging with labels, letters, email.
- **Locate information** — use "begins with" or "contains" lookup operators to find information when you can only remember a first name, or partial company name.
- **Save and reuse queries** — automatically refresh data for frequently used reports or merges.
- **Mass Update** — PowerView, when used with PowerImport, allows modification of selected records - for example, change all of Manager ABC clients to Manager XYZ.

The screenshot shows the PowerView application window with the following components:

- Client | Project | Contact** tabs at the top.
- Selection Criteria:** A table with columns: Field, Operator, Value, Connector.
 

Field	Operator	Value	Connector
Status	is equal to	1 - Active	AND
Office	is equal to	CPA - Moore & Profit P.C.	DONE
- Display Fields:** A list of fields with checkboxes: ID, Alpha Sort, Status, Name, Address1.
- Buttons:** Apply, Open Profile, Save Profile, Export, Clear.
- Data Grid:** A table with columns: Alpha Sort, Status, Name, Address1, Address2, City, State, Zip, Coun, Office, Email, Partn, Mana.
 

Alpha Sort	Status	Name	Address1	Address2	City	State	Zip	Coun	Office	Email	Partn	Mana
QUIN	Active	The Quintown	123 Lostcache R	P.O. Box 6789	Anytown	AA	12345-6789	USA	CPA	Presiden	CLI	MNM
PACIF	Active	Pacific Recor	The Music Mall	99 Notes Road	Anytown	AA	12345-6789		CPA		WIN	SAS
DEWEY	Active	Dewey, Help	Suite 323	66 Lawyer Lane	Anytown	AA	12345-6789		CPA		CLI	EMM
COMPUT	Active	Computer Pro	66 Technology R		Anytown	AA	12345-6789		CPA		CLI	MNM
DENTON	Active	Denton Fend	985 Crash Avenue		Anytown	AA	12345-6789		CPA		WIN	SAS
FRESHP	Active	Fresh Painter	44 Latex Lane		Anytown	AA	12345-6789		CPA		WIN	SAS
HARDTO	Active	Hard To Find	55 Elbow Road		Anytown	AA	12345-6789		CPA		WIN	SAS
HDOOPER	Active	The Hooper I	8746 West Street		Anytown	AA	12345-6789		CPA		CLI	MNM
COUNT	Active	Country Estat	88 Grass Court		Anytown	AA	12345-6789		CPA		WIN	SAS
HASTE	Active	Marion Haste	22 Wedding Lane		Anytown	AA	12345-6789		CPA		SAS	
MAYKEN	Active	Mayken Door	44 Construction St		Anytown	AA	12345-6789		CPA		CLI	MNM
PERFEC	Active	Perfect Office	123 Lane		Anytown	AA	12345-6789		CPA		CLI	MNM

**Price:** Included with PowerPM

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