



## Compatibility Guide

### Overview

**Introduction** Much like the paper version of Safeguard's Compatibility Guide [Software and Product Reports – DSC830851] CMS offers an electronic Compatibility Guide to help you quickly locate:

- Base Negative numbers
- Product Prefixes
- Competitor Forms translations
- Software Product Searches.

The two most common uses are the *Competitor Product Search* and *Software Product Search*.

This module will teach you how to use all four options available to you.

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**In This Section** These topics are covered in this section:

Topic	See Page
Competitor Product Search	2
Software Product Search	6
Base Neg/Advantage Product	10
Software Compatibility List	14

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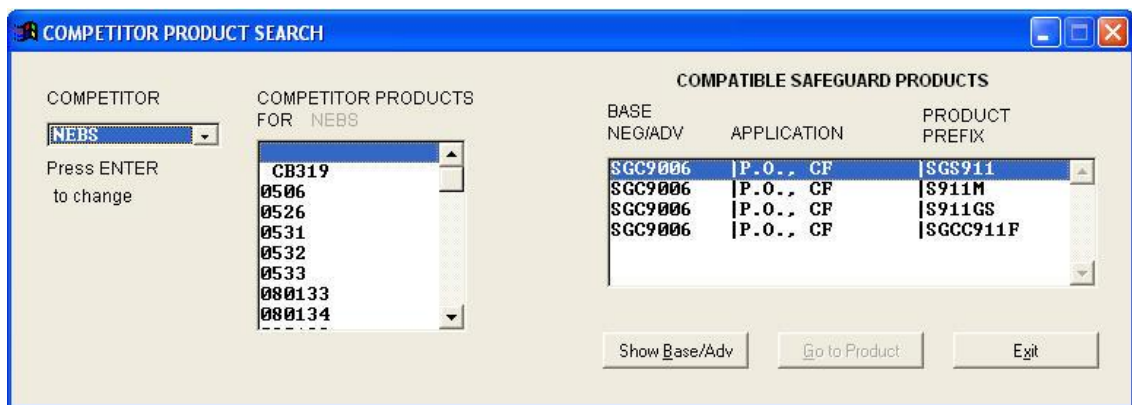
## Competitor Product Search

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**Introduction** This tool makes it handy when trying to translate a competitor's form number to a Safeguard form number.

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**Competitor Product Search Screen** This is an example of the Competitor Product Search screen:




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## Competitor Product Search, cont.

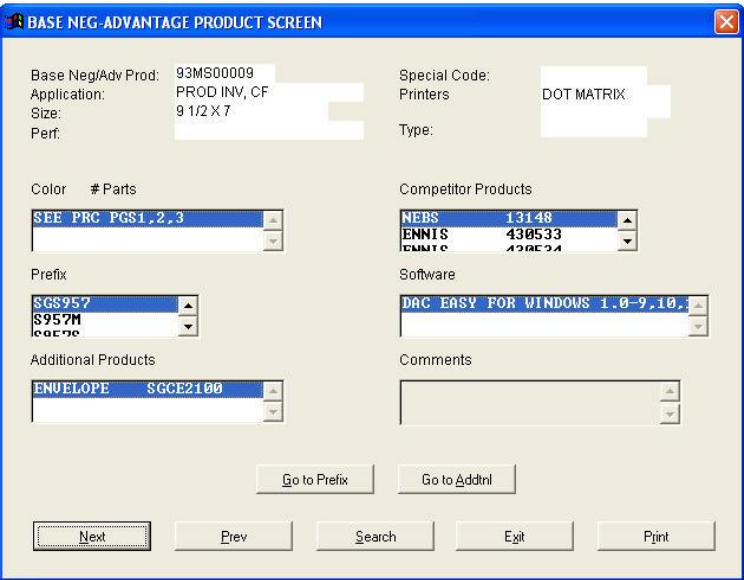
### Competitor Product Search

Follow the instructions below to understand the use of this section:

Step	Action
1	Navigate to the <b>Compatibility Guide</b> from the <b>File</b> menu in CMS and press <b>ENTER</b> .
2	Click the <b>Competitor Product Search</b> link.
3	In the <b>Competitor</b> field, click the drop-down arrow to select the Competitor's name. [e.g. ENNIS]. Using the mouse, highlight the desired option to select it.
4	In the <b>Competitor Product For</b> field, use the mouse to scroll through the option and click on the desired form number with your mouse. [e.g. 430534]
5	In the Compatible Safeguard Products box, the following appears: <div style="text-align: center;">  </div> <ul style="list-style-type: none"> <li>➤ <b>Base Neg/Adv</b> – This is the layout code used for the Design forms</li> <li>➤ <b>Application</b> – This tells you what type of form it is. [e.g. PROD INV, CF = Product Invoice, Continuous Feed]</li> <li>➤ <b>Product Prefix</b> – This is the beginning of the product code used to order this product.</li> </ul>

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## Competitor Product Search, cont.

Step	Action
6	<p>To view additional information about this product, click the <b>Show Base/Neg</b> button.</p> <p>The Base Neg Product screen will appear:</p>  <ul style="list-style-type: none"> <li>➤ <b>Base Neg/Adv Prod</b> - Base negative number used for the design form.</li> <li>➤ <b>Application</b> - Product Description</li> <li>➤ <b>Size</b> – the size of the check or form</li> <li>➤ <b>Perf</b> – perforation dimensions/placement</li> <li>➤ <b>Special Code</b> – Notes items like; Voucher Top (VT), Voucher Bottom (VB), and No Voucher (NO VOUCH).</li> <li>➤ <b>Printer</b> – the type of printer this check or form uses.</li> <li>➤ <b>Color # Parts box</b> – shows the color options and how many parts are available</li> </ul>

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## Competitor Product Search, cont.

Step	Action
6, cont.	<p data-bbox="597 489 857 525"><u>Show Base/Neg, cont.</u></p> <ul data-bbox="646 562 1432 884" style="list-style-type: none"><li>➤ <b>Competitors Products</b> – shows a list of all the competitors that manufacture this check or form</li><li>➤ <b>Prefix</b> – shows a list of available prefixes for this check or form</li><li>➤ <b>Software</b> – shows a list of software programs that utilize this check or form</li><li>➤ <b>Additional Products</b> – shows a list of additional items the customer might need [ e.g. envelopes that match the form]</li><li>➤ <b>Comments</b> – used by Safeguard’s marketing department to reflect comments about this check or form</li></ul> <p data-bbox="597 926 808 961"><u>Buttons Available:</u></p> <div data-bbox="597 995 1432 1142" style="border: 1px solid #ccc; padding: 5px; text-align: center;"></div> <ul data-bbox="646 1199 1425 1625" style="list-style-type: none"><li>➤ <b>Go To Prefix</b> - from the Order screen, displays the product file at the closest match to the displayed Safeguard compatible product. NOT available from the File Menu screen</li><li>➤ <b>Go to Addtnl</b> - When accessing the Compatibility Guide from the Order screen, displays the product file at the position of the highlighted product code in the Additional Products box. NOT available from the File Menu screen</li><li>➤ <b>Next</b> - takes you to the next one in the list</li><li>➤ <b>Previous</b> - takes you to the previous one in the list</li><li>➤ <b>Search</b> – enables you search by a base neg number</li><li>➤ <b>Exit</b> – allows you to exit this screen</li><li>➤ <b>Print</b> – allows you to print the information on the screen</li></ul>

NOTE: None of the information on the Compatibility Guide can be changed by you. If you have a question on the information listed contact Distributor Support.



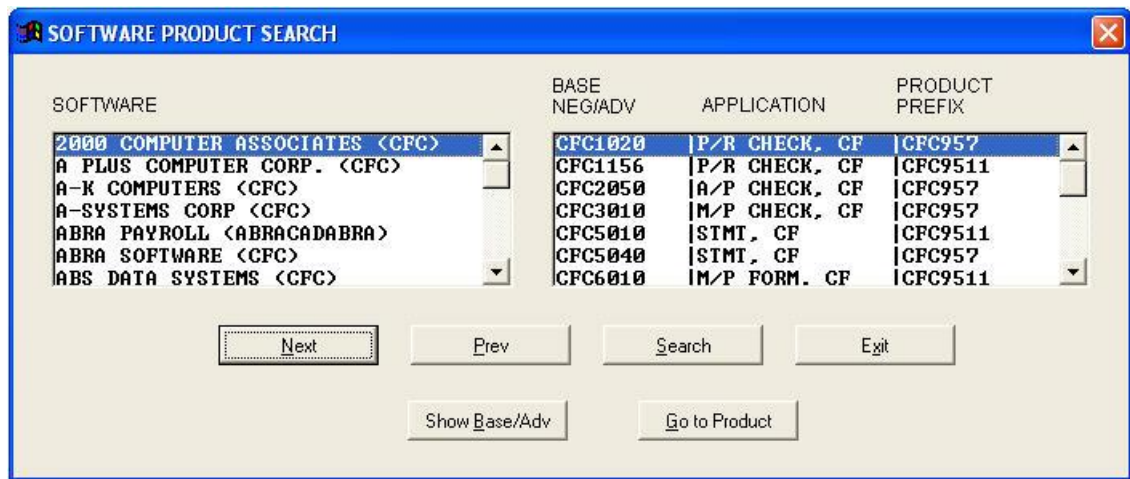
## Software Product Search

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**Introduction** This tool makes it handy when trying to locate the Safeguard Base Negative and Form's prefix when you know the customer's software.

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**Software Product Search Screen** This is an example of the Software Product Search screen:



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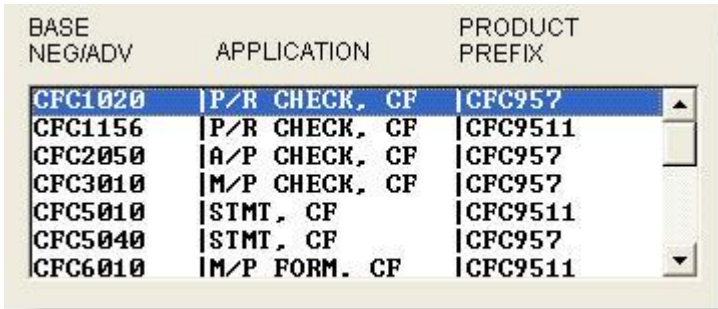
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## Software Product Search, cont.

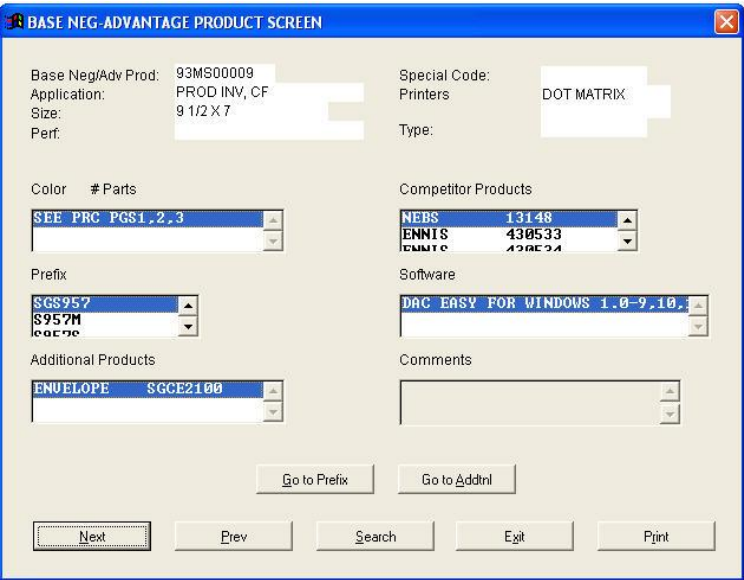
### Software Product Search

Follow the instructions below to understand the use of this section:

Step	Action
1	Navigate to the <b>Compatibility Guide</b> from the <b>File</b> menu in CMS and press <b>ENTER</b> .
2	Click the <b>Software Product Search</b> link.
3	In the <b>Software</b> field, use the mouse to scroll through the list. [Software is listed alphabetically]. Using the mouse, highlight the desired option to select it.
4	A list of options will appear, depending on which software was selected, the list varies:    <ul style="list-style-type: none"> <li>➤ <b>Base Neg/Adv</b> – This is the layout code used for the Design forms</li> <li>➤ <b>Application</b> – This tells you what type of form it is. [e.g. P/R CHECK, CF = Payroll Check, Continuous Feed]</li> <li>➤ <b>Product Prefix</b> – This is the beginning of the product code used to order this product.</li> </ul>

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## Software Product Search, cont.

Step	Action
5	<p>To view additional information about this product, click the <b>Show Base/Neg</b> button.</p> <p>The Base Neg Product screen will appear:</p>  <ul style="list-style-type: none"> <li>➤ <b>Base Neg/Adv Prod</b> - Base negative number used for the design form.</li> <li>➤ <b>Application</b> - Product Description</li> <li>➤ <b>Size</b> – the size of the check or form</li> <li>➤ <b>Perf</b> – perforation dimensions/placement</li> <li>➤ <b>Special Code</b> – Notes items like; Voucher Top (VT), Voucher Bottom (VB), and No Voucher (NO VOUCH).</li> <li>➤ <b>Printer</b> – the type of printer this check or form uses.</li> <li>➤ <b>Color # Parts box</b> – shows the color options and how many parts are available</li> </ul>

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## Software Product Search, cont.

Step	Action
5, cont.	<p data-bbox="597 485 857 520"><u>Show Base/Neg, cont.</u></p> <ul style="list-style-type: none"> <li data-bbox="646 562 1432 632">➤ <b>Competitors Products</b> – shows a list of all the competitors that manufacture this check or form</li> <li data-bbox="646 636 1419 667">➤ <b>Prefix</b> – shows a list of available prefixes for this check or form</li> <li data-bbox="646 672 1393 741">➤ <b>Software</b> – shows a list of software programs that utilize this check or form</li> <li data-bbox="646 745 1367 814">➤ <b>Additional Products</b> – shows a list of additional items the customer might need [ e.g. envelopes that match the form]</li> <li data-bbox="646 819 1393 888">➤ <b>Comments</b> – used by Safeguard’s marketing department to reflect comments about this check or form</li> </ul> <p data-bbox="597 930 808 961"><u>Buttons Available:</u></p> <div data-bbox="597 995 1432 1142" style="border: 1px solid #ccc; padding: 5px; background-color: #f0f0f0;"> </div> <ul style="list-style-type: none"> <li data-bbox="646 1203 1419 1304">➤ <b>Go To Prefix</b> - from the Order screen, displays the product file at the closest match to the displayed Safeguard compatible product. NOT available from the File Menu screen</li> <li data-bbox="646 1308 1419 1451">➤ <b>Go to Addtnl</b> - When accessing the Compatibility Guide from the Order screen, displays the product file at the position of the highlighted product code in the Additional Products box. NOT available from the File Menu screen</li> <li data-bbox="646 1455 1182 1486">➤ <b>Next</b> - takes you to the next one in the list</li> <li data-bbox="646 1491 1279 1522">➤ <b>Previous</b> - takes you to the previous one in the list</li> <li data-bbox="646 1526 1312 1558">➤ <b>Search</b> – enables you search by a base neg number</li> <li data-bbox="646 1562 1101 1593">➤ <b>Exit</b> – allows you to exit this screen</li> <li data-bbox="646 1598 1334 1629">➤ <b>Print</b> – allows you to print the information on the screen</li> </ul>
<p data-bbox="480 1738 1419 1808">NOTE: None of the information on the Compatibility Guide can be changed by you. If you have a question on the information listed contact Distributor Support.</p>	



## Base Neg/Advantage Product

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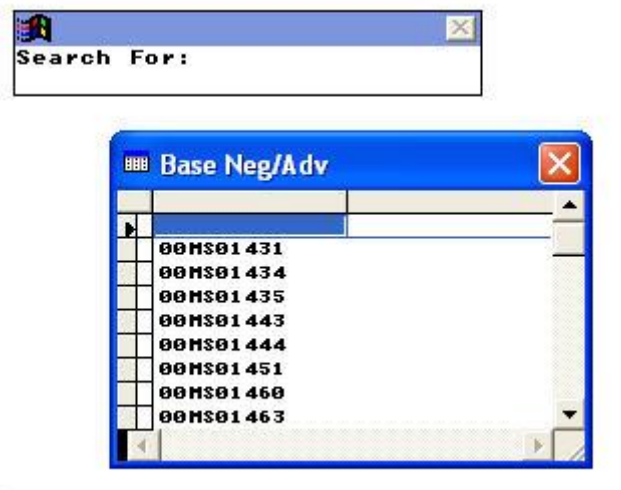
### Introduction

This tool makes is used to quickly locate information for a product using a base negative number as the look-up keyword.

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### Base Neg/Advantage Product Screen

This is an example of the Base Neg/Advantage Product screen:



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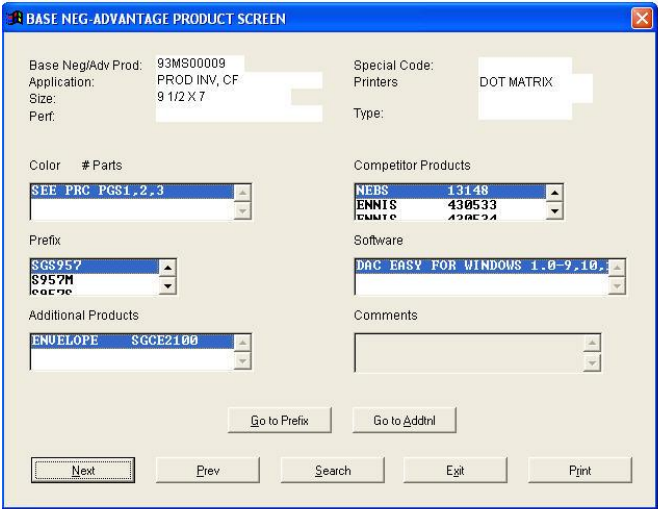
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## Base Neg/Advantage Product, cont.

### Base Neg/Advantage Product

Follow the instructions below to understand the use of this section:

Step	Action
1	Navigate to the <b>Compatibility Guide</b> from the <b>File</b> menu in CMS and press <b>ENTER</b> .
2	Click the <b>Base Neg/Advantage Product</b> link.
3	<p>Start <b>Typing</b> the base negative number [e.g. SF5001 – the base negative for a multi-purpose laser check], press <b>ENTER</b>.</p> <p>The Base Neg screen will appear:</p> 

➤ **Base Neg/Adv Prod** - Base negative number used for the design form.

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## Base Neg/Advantage Product, cont.

Step	Action
4	<p data-bbox="597 489 857 520"><u>Show Base/Neg, cont.</u></p> <ul data-bbox="646 562 1458 1171" style="list-style-type: none"><li>➤ <b>Application</b> - Product Description</li><li>➤ <b>Size</b> – the size of the check or form</li><li>➤ <b>Perf</b> – perforation dimensions/placement</li><li>➤ <b>Special Code</b> – Notes items like; Voucher Top (VT), Voucher Bottom (VB), and No Voucher (NO VOUCH).</li><li>➤ <b>Printer</b> – the type of printer this check or form uses.</li><li>➤ <b>Color # Parts box</b> – shows the color options and how many parts are available</li><li>➤ <b>Competitors Products</b> – shows a list of all the competitors that manufacture this check or form</li><li>➤ <b>Prefix</b> – shows a list of available prefixes for this check or form</li><li>➤ <b>Software</b> – shows a list of software programs that utilize this check or form</li><li>➤ <b>Additional Products</b> – shows a list of additional items the customer might need [ e.g. envelopes that match the form]</li><li>➤ <b>Comments</b> – used by Safeguard’s marketing department to reflect comments about this check or form</li></ul> <p data-bbox="597 1213 808 1245"><u>Buttons Available:</u></p> <div data-bbox="597 1283 1432 1430" style="border: 1px solid #ccc; padding: 5px; background-color: #f0f0f0;"><p style="text-align: center;"><input type="button" value="Go to Prefix"/>    <input type="button" value="Go to Addtnl"/></p><p style="text-align: center;"><input type="button" value="Next"/>    <input type="button" value="Prev"/>    <input type="button" value="Search"/>    <input type="button" value="Exit"/>    <input type="button" value="Print"/></p></div> <ul data-bbox="646 1486 1425 1591" style="list-style-type: none"><li>➤ <b>Go To Prefix</b> - from the Order screen, displays the product file at the closest match to the displayed Safeguard compatible product. NOT available from the File Menu screen</li></ul>

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## Base Neg/Advantage Product, cont.

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Step	Action
4, cont.	<p data-bbox="597 489 873 527"><u>Buttons Available, cont:</u></p> <ul data-bbox="646 562 1425 884" style="list-style-type: none"><li data-bbox="646 562 1425 699">➤ <b>Go to Addtnl</b> - When accessing the Compatibility Guide from the Order screen, displays the product file at the position of the highlighted product code in the Additional Products box. NOT available from the File Menu screen</li><li data-bbox="646 699 1425 737">➤ <b>Next</b> - takes you to the next one in the list</li><li data-bbox="646 737 1425 774">➤ <b>Previous</b> - takes you to the previous one in the list</li><li data-bbox="646 774 1425 812">➤ <b>Search</b> – enables you search by a base neg number</li><li data-bbox="646 812 1425 850">➤ <b>Exit</b> – allows you to exit this screen</li><li data-bbox="646 850 1425 884">➤ <b>Print</b> – allows you to print the information on the screen</li></ul>
<p data-bbox="480 957 1425 1031">NOTE: None of the information on the Compatibility Guide can be changed by you. If you have a question on the information listed contact Distributor Support.</p>	



## Software Compatibility List

**Introduction** The Software Compatibility List displays all the Safeguard products compatible with any software packages in the Compatibility Guide.

Use this option to create a report that will show all of the check or forms prefixes, base negative numbers, and product descriptions for a specific software application.

**Software Compatibility List Screen** This is an example of the Software Compatibility List screen along with a report print out:

The screenshot shows the 'Software Compatibility List' application window. It features two list boxes: 'Software' on the left and 'Software Selected' on the right. The 'Software' list includes items like '2000 COMPUTER ASSOCIATES <CFC>', 'A PLUS COMPUTER CORP. <CFC>', and 'ABRA PAYROLL <ABRACADABRA>'. Below the lists are instructions: 'Highlight & Press ENTER to Select Tab to Continue' and 'Highlight & Press ENTER to Unselect Tab to Continue'. There are buttons for 'Run', 'Cancel', and 'Edit Data', and a 'Destination:' dropdown menu set to 'Printer'. Overlaid on this is a 'Report Designer' window showing a 'Print Preview' of a report titled 'SOFTWARE COMPATIBILITY'. The report header includes 'CMS 6.5', '02/21/07', and '08:18:08'. The report content is a table with columns for 'SOFTWARE', 'BASE NEG/ADV', 'PRODUCT', 'APPLICATION', and 'PROD CODE PREFIX'. The data rows are:

SOFTWARE	BASE NEG/ADV	PRODUCT	APPLICATION	PROD CODE PREFIX
ACCOUNTCHECK	SF4001		M/P CHECK, SF	SFSL2
	SGC15009		M/P FORM, CF	SGC15009
	SGC4001		M/P CHECK, CF	CK97



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## Software Compatibility List, cont.

### Software Compatibility List

Follow the instructions below to understand the use of this section:

Step	Action
1	Navigate to the <b>Compatibility Guide</b> from the <b>File</b> menu in CMS and press <b>ENTER</b> .
2	Click the <b>Software Compatibility List</b> link.
3	Scroll through the available list, using the mouse highlight the desired option and press <b>ENTER</b> .  NOTE: The Software selected list will now be populated.
4	In the Designation box, select the option for output   <ul style="list-style-type: none"><li>➤ <b>Printer</b> – sends the report direct to the printer</li><li>➤ <b>Screen</b> – allows you to view the information on the screen prior to printing.</li><li>➤ <b>Disk</b> – allows you to export the information</li></ul> Click the <b>Run</b> button to continue.
5	If you selected Screen as the destination option, you will have additional choices when using the print preview function.   <ul style="list-style-type: none"><li>➤ <b>Next, Previous, First, Last [arrow] buttons</b> - allow you to move through a multiple page report.</li><li>➤ <b>Zoom drop-down</b> – allows you to zoom in and out as needed.</li><li>➤ <b>Close button</b>– when clicking on the door icon, the report closes</li><li>➤ <b>Print button</b> – allows you to send the report to the printer.</li></ul>