

Asset Keeper Pro - File / Client Information

Client Information

The Client Information screen located in the File menu or in the toolbar of the Home screen, allows you to set options specific for your client file.

The General screen, shown below, displays general information regarding the selected file. This information can be changed at any time and is automatically saved when the screen is closed.

On the left side of this screen you will find different sections for setting up methods, calculation options, etc. For detailed information on each of these sections, please refer to that specific document.

Note the option "Do Not allow access to this file". If this option is checked, other users cannot select this particular file.

The screenshot shows the 'Client Information' window for 'ABC Computer Consultants, LLC - December 31, 2013'. The window has a menu bar with 'File', 'Edit', and 'Help'. On the left is a 'Sections' sidebar with options: General (selected), Methods, Calculations, Account Setup, Monthly Depreciation, Screen Prompts, Duplicates and Auto-Increment, Report Options, Folders, and Asset Tracking / Constr in Progress. The main area contains the following fields and controls:

- Company Name: ABC Computer Consultants, LLC
- Year-End: 12/31/2013 (with an 'Edit' button)
- Tax ID: 99-1234567
- Business Activity: Computer Consulting
- Entity: S-Corporation (dropdown menu) (with a 'Shareholder Allocations' button)
- Client is involved in farming?
- Notes: Tutorial File for Asset Keeper.
- Do NOT allow access to this file? (indicated by a red arrow)
- Message to display if someone tries to select this file: (empty text box)

At the bottom, there are two date fields: 'Created 5/14/2014 - 9:00 AM' and 'Last Modified 5/14/2014 - 9:04 AM'. On the right, there are links for 'How To...?' and a 'Close' button.