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Adminsoft Accounts User Guide

Handling Images

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Introduction

Images can be used in numerous places within the accounts system.

They can be added to documents such as invoices, statements, etc. For both print/PDF and HTML type documents. They can also be added to the following records:

Stock Items
Equipment/Vehicles (AutoManager)
Jobs (AutoManager)
Assets
Employees
Company Vehicles
Diary Entries
General Address Book Address
General Address Book Contact
General Images (these are miscellaneous images, option in the 'General' menu)

Sales Orders (Sales Order Processing)
Sales Prospects (Sales Prospecting)
Customer Transactions
Supplier Transactions
Nominal/General Ledger Transactions

I've listed them as two groups, because they are handled differently. In the first group, when you add an image, the accounts system just stores the location and file name of the image file. It does not load the image up into the accounts system database or folders. If you 'remove' an image, it simply deletes that reference. It not does not delete the image file itself. More about this this later. In the second group, the software expects you to scan the image in. It assumes the image does not already exist. However, if it does exist, you can pick it up as if it had been scanned. Scanned images go into the default folder for documents. This location can be changed. Again, this will be discussed in more detail later on.

# Adding Images to Print/PDF Type Documents

There are at least two, and sometimes three ways of adding an image to a document. The first option is to use the default logo. Click on 'Setup' on the top menu bar, go down to 'Miscellaneous' and select 'Settings'. The first input field is '**Path & filename of logo**'. You can enter your logo here (you can drag and drop it if you like). It is optional, but it does mean when editing documents, it's a little quicker and easier to add your logo. Once you have selected your logo, the image should appear in the form.

To add an image to a document, edit the document. In the next form image, I've loaded up a customer invoice layout:

Adminsoft Accounts Basic User Guide – Images
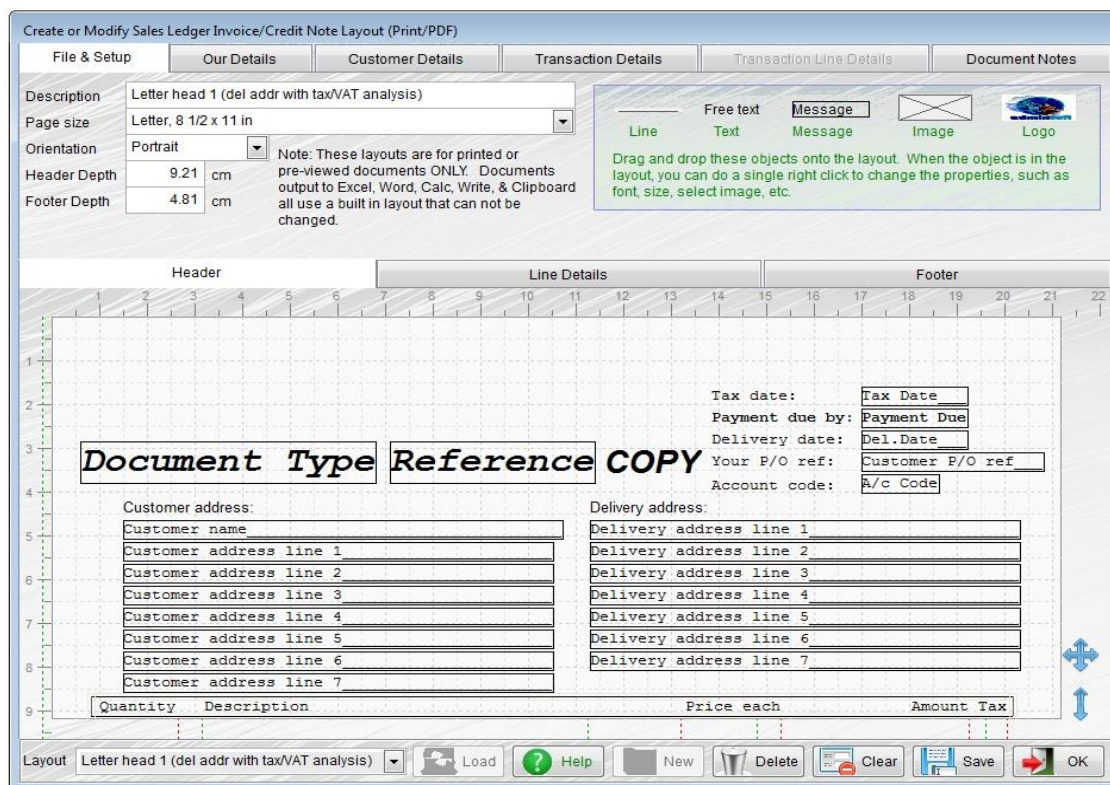
In the top righthand corner there are two image related objects. One of them, '**Logo**', already contains our logo previously set up in the 'Settings' option. You can now simply drag this down onto your invoice layout. The logo being displayed is rather crushed, in order to fit onto the data object. When you drop it into your layout, it will expand to its normal size and shape. You may need to single right click on it to change its size to fit the layout. See the next image, where I have dragged the logo onto the layout and then right clicked on it:
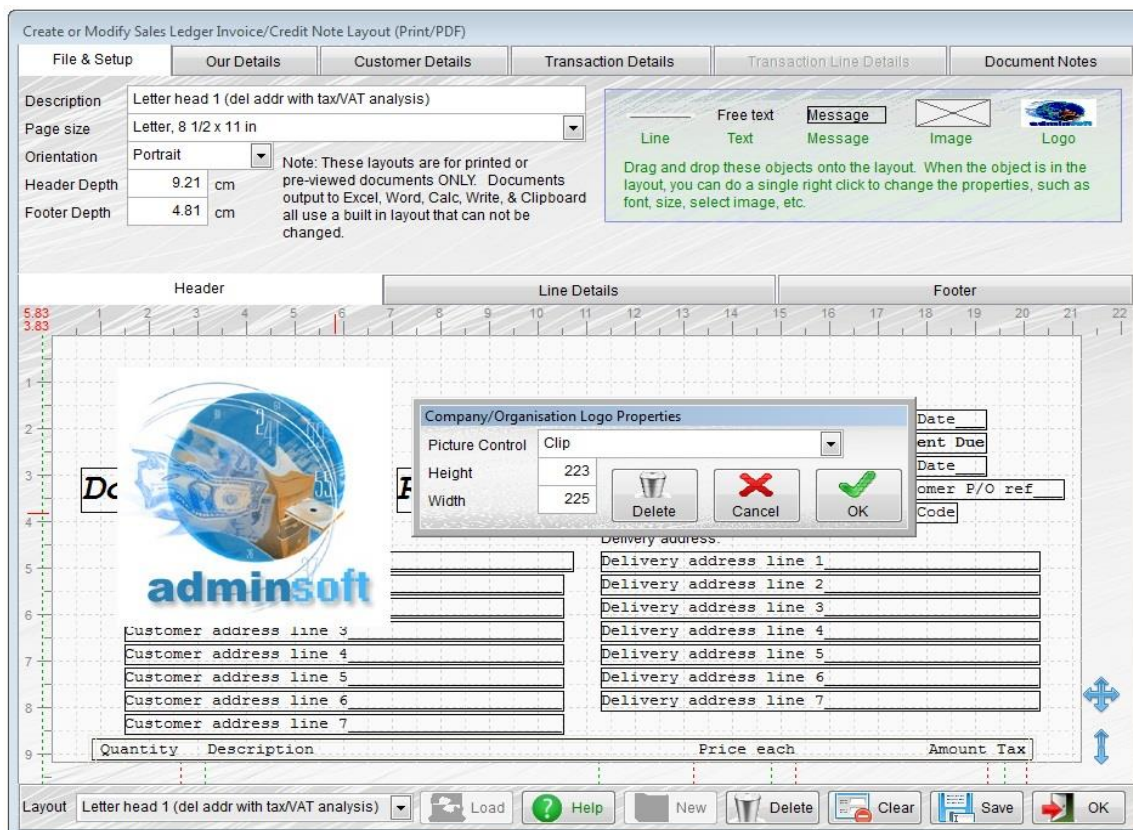
As you can see, I can change the height and width. I can also control the shape of it by the '**Picture Control**' setting. In its current setting of '**Clip**', it means if I reduce the size of the image, it simply reduces the available space for the image rather than making the image itself smaller. So, if I changed the height and width to 100 each, I would only see the top left quarter of the image being displayed. If I changed the setting to '**Scale, retain image shape**', then I would see the whole image, reduced to 100 x 100. There is a third setting '**Stretch image to fit frame**'. This is rarely used, but what it means is that whatever height and width you enter, the image will be increased or decreased in size and stretched to fit that size. With this setting, I could enter a height of 500 and a width of 50 and the image would be made to fill that size. Though it would be stretched too much, it would look pretty odd!

The other way of putting an image onto your layout is to drag the '**Image**' data object into the layout. You will then need to right click it to select the image. It has the same '**Picture Control**', '**Height**' and '**Width**' settings of the logo. This option is useful for images that perhaps create a fancy line, square, or some other design, to help make your document look special.

Please note. The logo and any other images selected are not stored with the document layout. It simply stores the location and name of the image file. The image/s are then not loaded up until the document is printed. This is not a problem on a single user system (unless you delete or move the image file), but if you have multiple users over a network, you have to bear in mind they must all have access to the image files, and they must appear to be in the same place. If a user prints a document which cannot access its image files, the document will still print (minus the images), but it may assume the images are no longer available, and so may remove them from the actual layout.

The third way of adding images applies to certain documents only, these are: Sales Invoices, Credit Notes, Proforma Invoices, Advice Notes, Delivery Notes (from A/c Receivable Ledger (Sales Ledger) only), Estimates, and Sales Orders (this also applies to HTML layouts). In the following image, I have loaded up a Sales Invoice with some images already added:

Adminsoft Accounts Basic User Guide – Images

I've added four images to the bottom right of the document layout '**Footer**'. These were dragged from the '**Images**' section in '**Transaction Details**'. The images printed will have been selected by the user at the time the invoice was entered (though they can be selected any time later), and are likely to be images of the stock items being sold (the stock images are available for selection in the invoice window). Images can also be scanned in or otherwise acquired in an invoice, and these can also be selected for printing. In the case of invoices, the '**Image desc.**' fields will default to the stock item stock code/SKU, but the user can edit them when entering the invoice.

Adding Images to HTML Type Documents

As we're talking about HTML, you can use the usual `<img src="file.jpg">` tag to add images into the document. Of course, those images will be static, in that the same image will appear every time the HTML document is output.

Some documents can use images that are associated with the transaction. Transactions that allow this include: Sales Invoices, Credit Notes, Proforma Invoices, Advice Notes, Delivery Notes (from A/c Receivable Ledger (Sales Ledger) only), Estimates, and Sales Orders (this also applies to Print/PDF layouts). When editing an HTML document, the tags for displaying images will appear on the left hand side list, along with all the regular data fields for account code, account name, etc. Below is an image to the image tags available for a Sales Invoice:
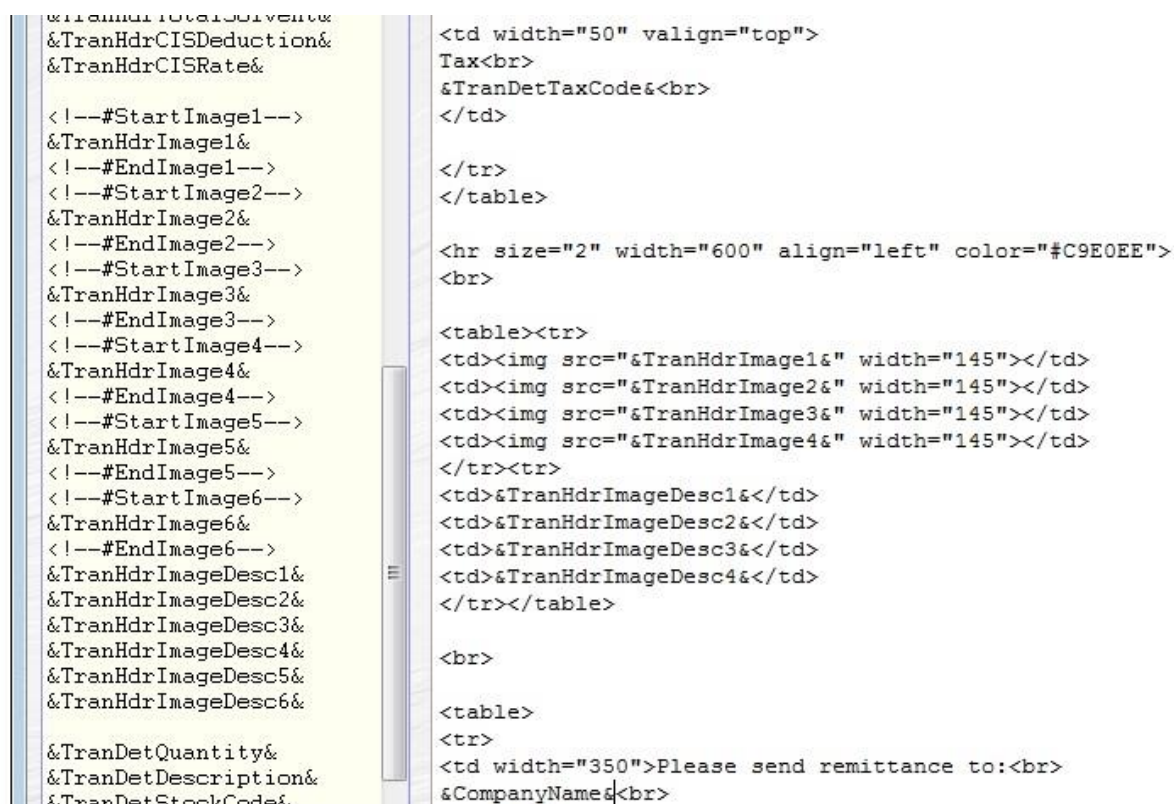
You can see the image tags on the left, and also a basic implementation of them on the right, in the HTML code for the Sales invoice. While some transactions allow up to eight images to be output in one document, transactions from A/c Receivable (Sales Ledger) are limited to six.

If a transaction has less than the number of images placed in the document layout (or perhaps no images at all), the software will use an image file that produces a white image of just one pixel. For most HTML layouts, that shouldn't cause a problem. But if not having an image to display does cause a problem, then you can use the `<!--#StartImage1-->` and `<!--#EndImage1-->` tags (they go from Image1 to Image6, of course). If there is no image to display, then all HTML code between the tags is not output. In the tag list in the HTML document editor, it just shows the image tags, but the HTML (or Javascript) code can be anything, and if there is no image, it will be removed.

You'll note the 'StartImage' and 'EndImage' tags are wrapped around the image code, and again around the image descriptions in a separate section below the images. The Sales Prospecting Estimate for multiple products is a little different, in that images can be select for the product header section, but 'StartImage' and 'EndImage' tags are not available, but images selected for the product footer section, do have the tags available. I've not tested this, but it might be those tags can be used in either section.

HTML documents are mainly used as part of the body of an email. If an image is on your local hard disk drive, or on a network drive, when the email is sent the image file/s will be picked up and bundled as part of the email (this includes images added to the HTML code using the image data fields). Bear in mind what we said at the end of the previous section about ensuring image files are available to all users. Also, images can be large. So, don't go mad with them! Any one picking up their email via mobile phone may not appreciate having to download 20mb worth of images. If any images are on the internet, then just link to the image in the email. The image won't be loaded up until the person receiving the email opens it (and usually they have the option of downloading images). This makes the email a lot smaller. However, some users turn off image downloads if bandwidth on their device is an issue, or sometimes for security reasons. So, you might create an email that looks great with the images in place, but consider what it'll look like if those images aren't loaded.

Adminsoft Accounts Basic User Guide – Images

Adding Images to Stock Items, Assets, Employee Records, etc.

Stock Items
Equipment/Vehicles (AutoManager)
Jobs (AutoManager)
Assets
Employees
Company Vehicles
Diary Entries
General Address Book Address
General Address Book Contact
General Images (these are miscellaneous images, option in the 'General' menu)

All the above allow you to add up to 8 images per record.   These must be existing images, and can exist anywhere on your hard drive or on the shared drive on a network. The software does not copy, move, or rename any of the images. All it does is store the location and file name of each image file.

So, for example, if you are in the Stock Item Details option, looking at a stock item, click the '**Images**' button. The following form will appear:

As you can see, this stock item currently has no images associated with it. The section on the left hand side of the form lists any images already associated (up to 8). If you click on one, it will appear in the larger display section towards the middle of the form. To add an image, you can either single right click on one of the left hand image pads, and then locate the image file, or if you have Windows Explorer open, you can drag and drop an image file onto one of the image pads. It doesn't matter which pad. In the example below, I've dragged a couple of images onto the form:

Note: you cannot drag and drop an image from the internet. Although the image will come across, and sit in the image pad looking like it's working, it won't be saved. This is because this option does not copy images, it just records the location and file name.

Below the image in the main display section (showing the green USB memory stick in the above example), there is an input field '**Description**'. You can type anything in here you wish. If there are different colours, or different types/orientation of one particular stock item, you could identify it here. This input field can be left blank if you wish.

At this point, if I click the '**Cancel**' button, it will forget about these images. If I click the '**Remove**' button it will remove the image that's displayed in the main display section. The green USB memory stick, in this case. It only removes it from the form, **it does not delete the image file**. If I click '**View/Print Image**', the image file will be opened using Windows default software for viewing that particular image type. Usually Windows Photo Viewer for JPG, PNG or BMP files, or Adobe Acrobat Reader for .PDF files.

If you load a PDF file, the small image pads will only show a PDF icon. You will have to click on the icon to see the PDF displayed in the main display section.

If you single right click on an image pad to locate a new image file, the default drive and folder that appears can be set up in the respective Setup → Settings option of each module. So, if you tend to keep all your stock mages in one place, you can set that up as the default location. Just saves a little time each time you want to locate images.

There are two important things to note here: 1) if you are operating a multi-user system over a network, all users must have access to the image files. Otherwise they will not display, they will simply see a blank image pad. Although the description and path plus filename information will be retained. 2) **the backup option in Adminsoft Accounts WILL NOT backup these image files. As they could be scattered anywhere, and even used by other software packages. So, it's vital you make alternative arrangements to back them up.**

Adminsoft Accounts Basic User Guide – Images

Adding Images to Sales Invoices/Credit Notes, Sales Order Records, etc.

Sales Orders (Sales Order Processing)
Sales Prospects (Sales Prospecting)
Customer Transactions
Supplier Transactions
Nominal/General Ledger Transactions

The above can also have image files associated with each record. However, it works differently to the option discussed in previous pages. The assumption is that these images will need to be created by scanning in the document (although it can also use existing images on your hard drive and images off the internet). If you have a TWAIN compliant scanner attached to your PC, the scanning can be done from Adminsoft Accounts.

If I bring up the details of a Sales Invoice, and click the '**Images**' button, I'll get the following form:

Before you can scan in a document for the first time, click on the '**Select Source**' button. This should allow you to select your scanner as an image source. If your scanner is not listed, it maybe it does not have TWAIN software loaded. TWAIN is the software interface that is required to allow applications like Adminsoft Accounts to communicate with your scanner. In the example above, I've already selected a CanoScan LiDE 25.

Once a scanner is selected, you need to set the '**Scan Settings**'. The thing here is to use the lowest settings you can get away with. If you don't need colour, set '**Scan Type**' to 'Gray Scale'. The reason is, colour scans create much bigger images than gray scale. For the other settings, we tend to use:

Pixel Bits: 8 bit
Resolution: 75 dpi
Quality: 40%

This keeps the size of each image down to between 200k and 400k, depending on what's on the image. Over time, you could find you've scanned in a lot of images. 1,000 images at 400k each is 400mb. If you select colour images at a fairly good quality, you could be looking at 4mb per image. Those 1,000 images would now be 4gb. Yes, disk drives have lots of capacity, but the more space taken up by images, the longer it will take to backup. And regular backups are VERY important.

Once you have selected your scanner settings, click the '**Save Settings**' button to save them. They will then automatically appear next time, as will your selected scanner.

To scan an image, simply click on one of the '**Acquire**' buttons. If the image is already on your PC or network, you can click on '**Locate File**' to find it and load it up. You can also drag and drop an image file from Windows Explorer or from the internet onto one of the thumbnails (or image pads as they sometimes get called). Once an image is displayed, regardless of whether it was scanned in or an existing image file, for consistency it will be handled as if it's been scanned.

Sales Prospecting estimates for multiple products use a different option for obtaining images. It looks like this:

Images cannot be scanned in, but you can click the '**Locate File**' button to locate existing images on your hard disk or network. You can also drag and drop images from Windows File Explorer or from the internet. The '**Remove**' button will remove an image from an image pad, and if the image has already been loaded up into Adminsoft Accounts, the image file will be deleted. It does not delete the file the image originally came from (which if it was off the internet would be impossible anyway). You'll notice there is no description for each image (as they're expected to be all one product), but here is a large area for an overall description. The description input is actually a WYSIWYG HTML editor. You can change fonts, font sizes, colors, etc. You can also copy and paste text from the internet or other sources into this editor. See the guide on Sales Prospecting for

further details on using this option.

Both the options discussed in this section actually stores the image files within the Adminsoft Accounts system. By default, the image files are stored in a folder called 'docs' which is next to your 'data' folder. This same folder also contains any documents that have been attached to an account or transaction. They can be backed up from Adminsoft Accounts along with your data (make sure you select an 'images' option). However, it is possible in the Setup → Settings option of each software module to select an alternative location to store the images

IMPORTANT: If you do select an alternative location for images, they will NOT be backed up by the Adminsoft Accounts backup option. Even if you select 'images' to be backed up (it will only backup anything in the default 'docs' folder). You would have to make other arrangements to back up these files.

This system handles the following types of images: BMP, JPG, PNG, GIF, ICO. It can also handle PDF files, but it cannot display a thumbnail image, it will simply display a PDF logo.

If you click the '**Remove'** button, it will physically delete the image. If the image already existed and was copied from another location, the copy will be deleted, but the original file will remain.

If this option has already been used to add images to a transaction, in the transaction details, if the '**Images**' button is clicked again, this same option appears, along with the images. Images can be added or deleted at any time. They can also be selected for printing/displaying when the transaction is output (the document layout must support images, see a few pages back).

Also, you may notice each image pad is marked as 'Page 1', 'Page 2', etc. This assumes that each image is a page from a multi-page document. Though of course, in practice the images could be anything you wish.

Sales Invoices/Credit Notes, Proforma Invoices, and Advice Notes

These are all generated in A/c Receivable (Sales Ledger), and include Estimates generated from that ledger. Elsewhere that images can be output in print/PDF and/or HTML documents, the document has a choice of any of the available images. There are normally up to 8 images available. But customer transactions are different. This is because as well as acquiring images using the 'Acquire Document Image/s' option discussed a few pages back, any stock items in the transaction may have their own images associated with them. So, in these customer transactions it is necessary to select which images will be available to the print/PDF or HTML document to be output.

The example I'll show you is a Sales Invoice. In the next screen image, I've clicked on the '**Select Images to Print**' tab, and dragged a couple of stock images into the '**Images to print**' section:
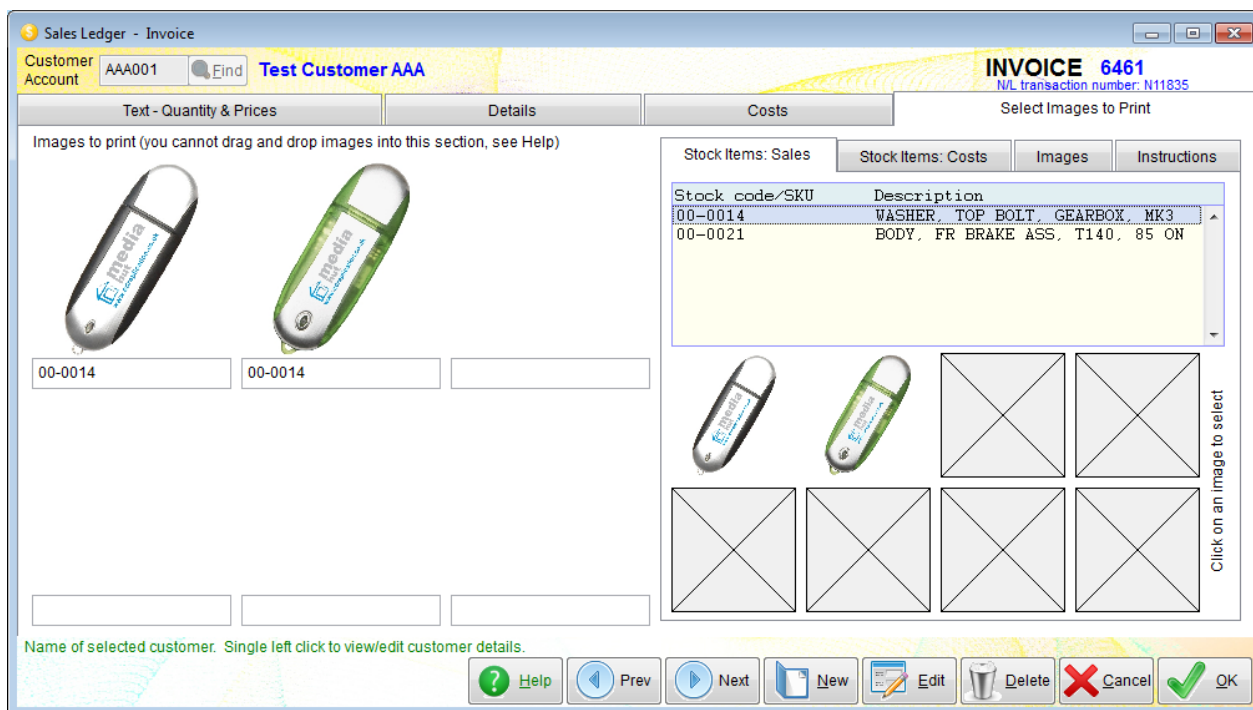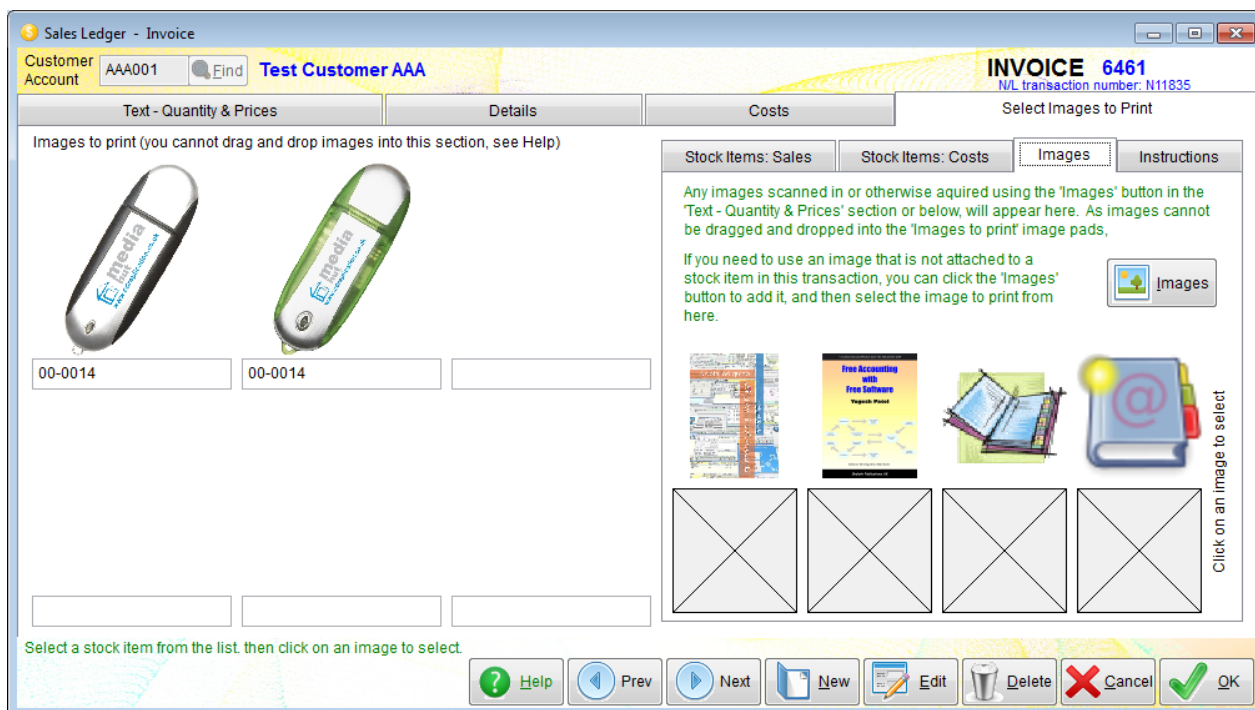
The description of the stock item I used says "WASHER, TOP BOLT, GEARBOX MK3", just ignore that! Clearly the images are USB memory sticks. The righthand side contains the source of the images, and the left hand side contains the images that have been selected by the user as being available for printing. There are two lists of stock items in a Sales Invoice, the list of items actually being sold, which will be listed in the '**Stock Items: Sales**' tab in the above screen image. And a list of items for cost purposes (often the same, but not always), which will appear in the '**Stock Items: Costs**' tab. Only stock items that have images associated with them will be listed. You can click on a stock item, and its images will appear in the 8 small image pads below the list. You can then click one of those images and it will appear in the '**Image to print**' section. Note: you can only select up to 6 images. In the '**Image to print**' section, below each image is a short description. This defaults to the stock code/SKU the image came from, but you can edit it, and type what you like in there. It is limited to 20 characters. If you need to remove an image from the '**Image to print**' section, right click on the image. This only removes it from this section, it does not remove it from the stock item of where ever it came from. If you want to use an image that was added to the transaction using the 'Acquire Document Image/s' option, click on the '**Images**' tab. The images will appear, as will the '**Images**' button which can take you to the 'Acquire Document Image/s' option. Note: there are two versions of the Invoice/Credit Note window, a small one and a larger one. The larger one will always be used, unless there isn't enough space available to Adminsoft Accounts, then it may use the smaller one. The smaller one does not have an '**Images**' button in the 'Text – Quantity & Prices' section (due to lack of space), and so the '**Images**' tab is the only place it appears.

Anyway, when we click on the '**Images**' tab, we'll see something like the next screen image:

As you can see, I've acquired four images of books. Just like the stock images, you just need to click on to select it.

In the '**Images to print**' section, if single click an image (ie. a normal left click), a larger version of it will be displayed in its own window.

The '**Images to print**' section can only use images that already exist in the Adminsoft Accounts system, it is only storing the location and file name of images. It is not making a copy of them to store elsewhere, So, at the time the transaction is printed out, the image files must exist, in the same location, and with the same name. Normally, this will not be an issue, as transactions are printed out straight after they are created, or very soon after. But if you print out an old transaction, you may find not all the images are present. Stock item images can be changed, and where a stock item is no longer used, they may perhaps be deleted

Obviously, any images selected to be available for print will only print if the print/PDF or HTML document layout has data fields/tags in it to handle the images. Most of the layouts supplied when the software is installed do not have any images incorporated into the layout, and so you may need to do some layout editing.

Manage (and Move) Image Files

You can find this option by clicking on 'Setup' on the top menu bar, go down to 'System' and select 'Manage (and Move) Image Files. It was only introduced in v4.184. So, if you're using an earlier version of Adminsoft Accounts, you'll need to update it.

When you start up this option will look something like the following screen image:

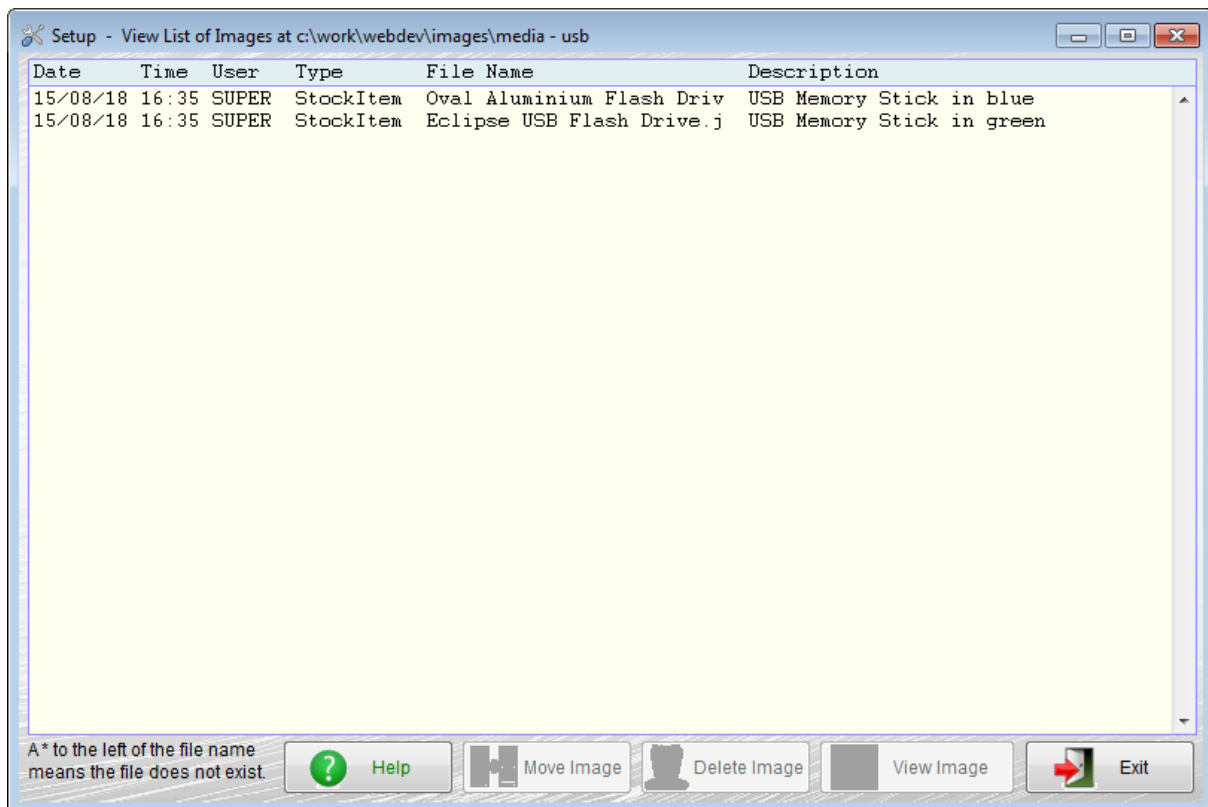# Adminsoft Accounts Basic User Guide – Images
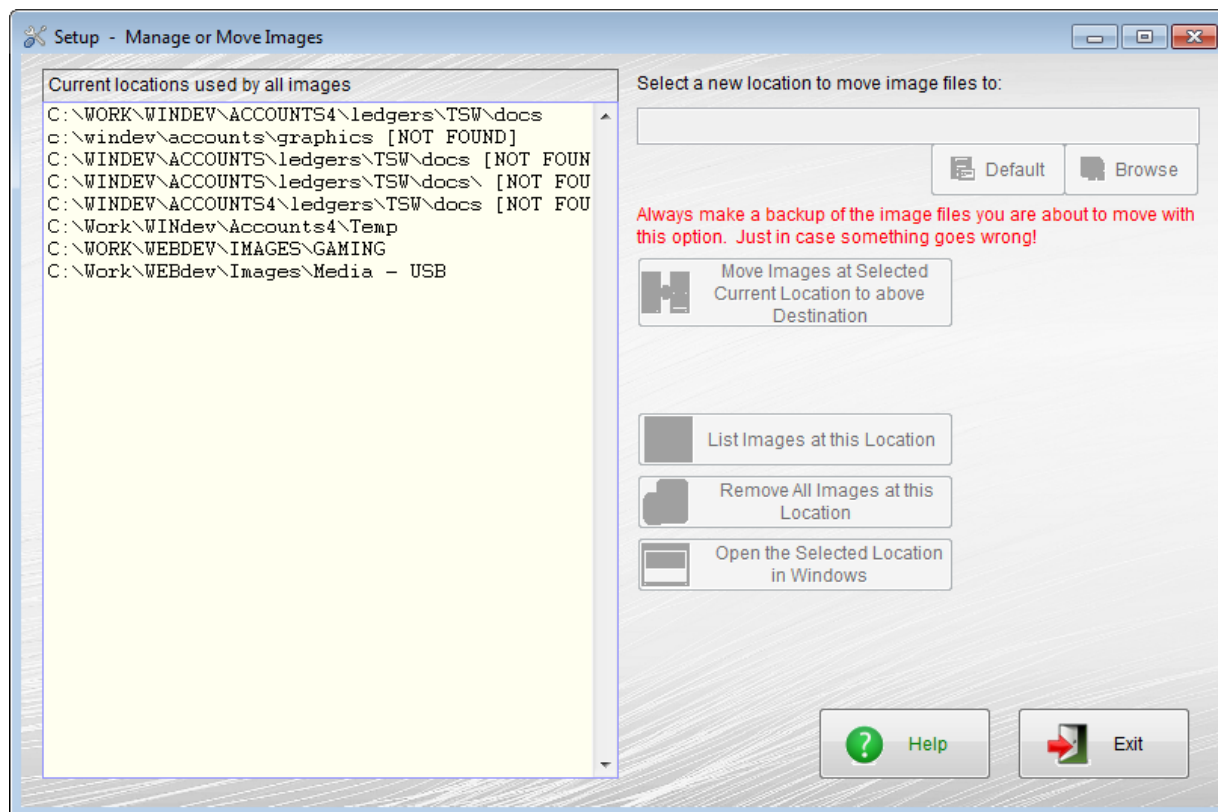
The list on the left hand side shows each folder used by all the images stored in the accounts system. For all modules and all record types. Everything.   As you can see, some of these folders don't exist. In this case they contained test data from goodness know how long ago. If I click one, I can then click the '**List Images at this Location**' button to see what images files it thinks it has. I can also click the '**Remove All Images at this Location**' button to remove the files at this non-existent location. This will also work when the location is valid, but it will then ask you to confirm before removing them.

The default folder for scanned images always appears first in the list, followed by any alternative locations for scanned images. Whether or not there are image files stored there or not. Following those are locations used by images for things like stock items, employees, and so no, that have not been scanned in, but simply have their location and file names recorded.

You can move one group of image files to another location. Click on the location in the list on the left hand side, then enter the new location into the input field, then click the '**Move Images at Selected Current Location to above Destination**' button. This will move all the images, and change all the path and file name references as required. Note: this option will actually move the image files, regardless of whether they were scanned in or already existed. So, this option **CAN** change original image files.

If you click the '**List Images at this Location**' button, a form will appear looking something like the next screen image:

It lists the date and time the image was created, or at least associated, which user was involved, what the image is for (the '**Type**'), and the file name and description. As the drive and path are all the same, it displays that at the very top of the form (in the 'caption' area).

If you click on any image file, provided it exists, you can then click the '**Move Image**' button to move it somewhere else, '**Delete Image**' button to physically delete it (ie. not just remove the record of its location and file name), and the '**View Image**' button to view the file using Windows.

If an image file does not exist, it will have an * to the left of the file name. You will be able to click the '**Delete Image**' button to remove the reference to the file.

Background Images on Forms

You will have noticed most forms have a subtle, almost pastel like background image. You can select different images, or chose your own image files. Click on 'Setup' on the top menu bar, go down to 'Miscellaneous', and select 'Set Background Images'. The form that appears will look something like the following image:
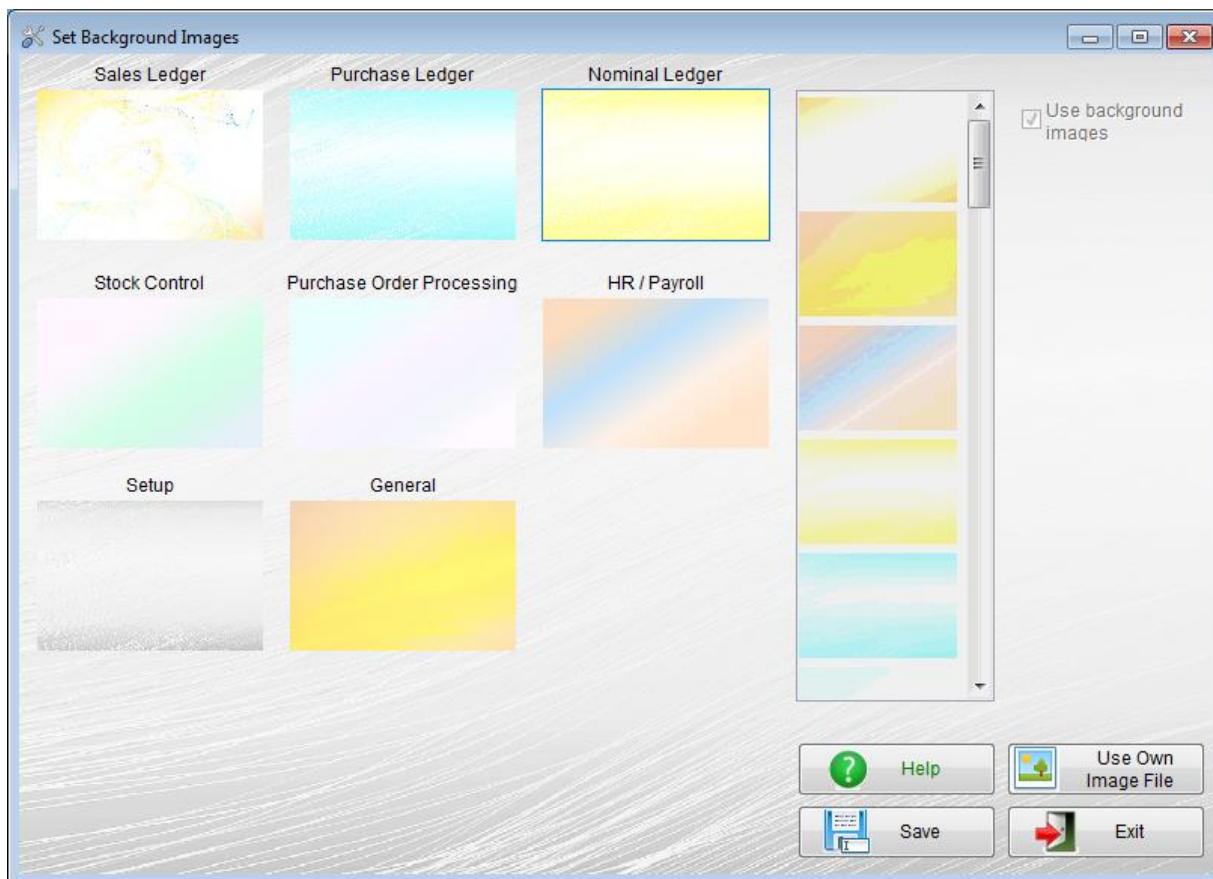
This option allows you to setup background images. Each module in the accounts system can have its own image. A range of images are already supplied, but you can load up your own if you wish.

To select an image for a particular module, click on the area just below the name of the module. If it's already setup to use an image, a thumb print of the image will be displayed. When selected, the name of the module will appear on the righthand side of the form, above the list of available images. You can scroll the list using the scroll bar, and click on an image to select it. To load up one of your own images, click the '**Use Own Image File**' button. When selected, the image will appear in the relevant module.

If the list and the '**Use Own Image File**' button are greyed out and cannot be selected, it's probably because the module has been set to not use images. Click on the '**Use background images**' option. The list and the button should then be available for use.

You will note all the built in images are fairly light pastel type images. Not too dark, and not too busy. If you wish to use images of your own, you should pick with care. The darker and more detail an image contains, the harder it will be to read the text on a form. The ideal size for an image is a width between 1200 and 1400 pixels, and a height between 600 and 1000 pixels. Also, the image has to be always available on disk. It is only loaded up as an when required. So, if the file is no longer available, then the module that used that image will no longer display it. When using the software over a network, it's important that you select files that will be available to all users, using the same drive/folder names.

You can see what the images will look like in use by clicking the '**Save**' button. But of course, this will save the image settings. But if you don't like the images selected, you can always change them back again.

Adminsoft Accounts Basic User Guide – Images

When done, click the 'OK" button to exit this form and save the images selected. These images will apply to the currently selected company/organization, and will be used by all users. If you create a new company/organization, it will use a default set of images. So, if you want to use particular images for that company/organization, you'll have to run this option again to set them up.

If your copy of Adminsoft Accounts has a Software Registration Key, when you select a company/organization, you will see an image in the background. You can change this to any image on your hard drive or network by doing a single right click anywhere in the background. Whatever image you select will remain until you change it again.

*** end of document ***