Newton Main Menu - Quick Start Guide

Marketing

Legacy Menu	New Menu Location (2017)
Client Query Wizard	**Client** – Client Query
Diary Maintenance	**User Dashboard** – Create Item - Diary
Diary and Submission Reports	**Reports** – Other – Diary and Submission Reports
Memo Writer	**Setup** – Memowriter Letter Library
History Reports	**Reports** – Other – History Reports

G/L

Legacy Menu	New Menu Location (2017)
Balance Sheet	**Reports** – Balance Sheet
Bank Deposit	**Accounting** – Bank Deposit
Bank Reconcile	**Accounting** – Bank Reconcile
Bank Transfer	**Accounting** – Bank Transfer
Daily Mgmt Summary	**Reports** – Daily Management Summary
General Ledger Detail	**Reports** – General Ledger Detail
General Ledger Inquiry	**Reports** – General Ledger Inquiry
G/L Budget Maintenance	**Accounting** – G/L Budget Maintenance
Income & Expense	**Reports** – Income & Expense
Journal Register	**Reports** – Journal Register
Journal Summary	**Reports** – Journal Summary
Journal Entry	**Accounting** – Journal Entry
Open/Close Month	**Accounting** – Open/Close Month
Trial Balance	**Reports** – Trial Balance

A/R

Legacy Menu	New Menu Location (2017)
Aged Receivables	**Client or Company** – Agency Receivables for __
Agent Statement	**Client** – Agent Statement
Broker Statement	**Client** – Broker Statement
Cash Transaction	**Accounting** – Cash Transaction
Cash Reports – Cash Summary	**Reports** – Cash Reports – Cash Summary
Cash Reports – Cash Deposit Report	**Reports** – Cash Reports – Cash Deposit Report
Claims List Report	**Reports** – Claims List Report
Client Statement	**Client** – Client Statement
Collection Summary	**Client** – Collection Summary

Invoice Register	**Reports** – Invoice Register
Late Charges – Auto Late Charges	**Client** – Late Charges – Auto Late Charges
Late Charges – Manually Edit Late Chg	**Client** – Late Charges – Manually Edit Late Chg
Late Charges – Late Charge Report	**Client** – Late Charges – Late Charge Report
Open Item Match	**Accounting** – Open Item Match
Policy List Report	**Reports** – Policy List Report
Policy Reports – Active Production by Date	**Reports** – Policy Reports – Active Production by Date
Policy Reports – Policy Expiration List	**Reports** – Policy Reports – Policy Expiration List
Policy Reports – New Business by Effective Date	**Reports** – Policy Reports – New Business by Eff Date
Policy Reports – Policy Report - User Defined	**Reports** – Policy Reports – User Defined
Policy and Billing	**Accounting** – Policy and Billing
Print Invoices	**Client** – Print Invoices
Reconcile Receivables	**Client or Company** – Reconcile Receivables
Sales Analysis – by Client	**Client** – Sales Analysis by Client
Sales Analysis – by Class, Company or Producer	**Company or Producer** – Sales Analysis by __
Statistics Entry	**Accounting** – Statistics Entry

A/P

Legacy Menu	New Menu Location (2017)
Accounts Current	**Company** – Accounts Current
Check Reports – Check Summary	**Reports** – Check Reports – Check Summary
Check Reports – Check Register	**Reports** – Check Reports – Check Register
Check Transaction – Express Checks	**Accounting** – Express Checks
Check Transaction – Non-policy Related	**Accounting** – Non-policy Related Checks (legacy)
Company Statement	**Company** – Company Statement
Invoice Query	**Reports** – Invoice Query
Open Item Match	**Accounting** – Open Item Match
Print Checks	**Accounting** – Print Checks
Producer Statement	**Producer** – Producer Statement
Reconcile Payables	**Company or Producer** – Reconcile Payables
Reconcile Payables Batch – Batch Create Company	**Company or Producer** – Reconcile Payables Batch
Reconcile Payables Batch – Batch Process Company	**Company or Producer** – Reconcile Payables Batch
Reconcile Payables Batch – Batch Create Producer	**Company or Producer** – Reconcile Payables Batch
Reconcile Payables Batch – Batch Process Producer	**Company or Producer** – Reconcile Payables Batch
Surplus Lines Report	**Company** – Surplus Lines Report
1099-MISC Forms	**Vendor** – 1099-Misc Forms
Voucher Transaction	**Vendor** – Voucher Transaction

Profiles

Legacy Menu	New Menu Location (2017)
Agency	**Setup** – Agency
Bank	**Setup** – Bank
Class	**Setup** – Class
Client	**Setup** – Client
Company	**Setup** – Company
Contract	**Setup** – Other – Contract
Department	**Setup** – Department
General Ledger	**Setup** – General Ledger
Additional Interest	**Setup** – Additional Interest
Producer	**Setup** - Producer
Tax And Fee	**Setup** – Other – Tax & Fee
Transaction	**Setup** – Transaction
Vendor	**Setup** – Vendor
Payment Fee Setup	**Setup** – Other – Payment Fee Setup
Attachment Tag Setup	**Setup** – Other – Attachment Tag Setup
Other – Diary Category	**Setup** – Other – Diary Category
Other – Diary Sub Category	**Setup** – Other – Diary Sub Category
Other – Submission Status	**Setup** – Other – Submission Status
Other – Diary Type	**Setup** – Other – Diary Type
Other – State	**Setup** – Other – State
Other – User Codes	**Setup** – Other – User Codes

Other

Legacy Menu	New Menu Location (2017)
Preferences	**Setup** – Preferences
Configure Forms	**Setup** – Configure Forms
Profile Item Counter	**Reports** – Other – Profile Item Counter
Rebuild Control Totals	**Help** – Data Utilities – Rebuild Control Totals
Security System	**Setup** – Security System
Choose Printer	**Setup** – Choose Printer
Automatic Reports	**Reports** – Automatic Reports
Download	**Company** – Download
Upload Configuration	**Setup** – Upload Configuration