

SALES PLUGIN

2010 EDITION

PREMIER DATA SYSTEMS, INC.
3333 S WADSWORTH BLVD #C-106
LAKEWOOD, CO 80227

800-533-7420

Actions

-  Estimate Pro
-  Word Processor
-  Reports
-  Setup

Contacts | History |

Sales Contact

Name
Phone
Email

Notes

User defined
User defined

User defined
 User defined

SALES PLUGIN

OVERVIEW

“How can we increase sales?” This is a question heard in every (for-profit) business in the world. One of the most frequent replies is – More advertising! Another reply should be a highly effective and professional response to the leads generated from advertising.

This is the purpose of the Sales Plugin, an easy-to-use tool to help you respond to requests for estimates and proposals. With this system, you can easily and quickly create professional and easy-to-read estimates for your clients and prospective clients. Additionally, the Sales Plugin helps you manage your estimates with easy recall, editing, analyzing and completion, all the way through invoicing.

This chapter describes how to use the Sales Plugin and offers some advice on creative ideas.

The chapter is broken down into five main areas: Sales Plugin (1.0), Estimate Pro (2.0), Word Processor (3.0), Reports (4.0) and Setup (5.0).

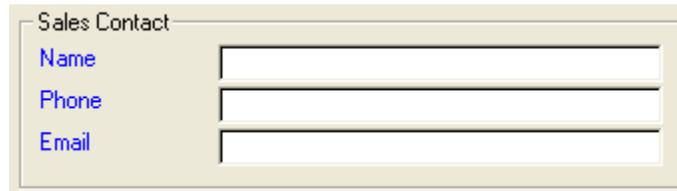
Sales Plugin

The Sales Plugin holds all client data for a currently displayed account. The two tabs on the Sales Plugin divide the information into two categories – Contact Information and History. Like all plugins in the Premier program, the Sales Plugin has a list of actions on the left-hand side which include Estimates, Reports, Word Processor and Setup.

First, we'll look at the tabs at the top of the Finance Plugin.

Contacts Tab

The Contacts tab on the Sales Plugin holds contact information for the currently displayed account. With the exception of the Email field, all information on the Contacts tab is optional. The email field is not required if estimates will not be emailed to your client.



The image shows a window titled "Sales Contact" with three input fields. The first field is labeled "Name", the second "Phone", and the third "Email". Each field is empty and has a light gray border.

Unique Account sales contact information can be entered in the Sales Contact window.

1.1.1 Name

The contact name or names can be entered in this field if different from the contact name displayed on the header of the account or if the formatting is different. This is useful for when you merge client data into your estimates. You can put a unique name or a differently formatted name in this field. For example, if the contact name shown at the top on the account's header is MR. ROBERT J. SMITH but you want the salutation on your proposal to read Dear Bob, you would simply enter the client's name as Bob in this field.

1.1.2 Phone

The phone number field can be used to enter a unique phone number for your sales follow-ups. Use this field if the phone number to call is different than the phone number shown at the top of the screen on the account's header.

1.1.3 Email

If emailing estimates to your client, you'll want to enter the client's email address in this field. Multiple email addresses can be entered such as tom@aol.com; mike@aol.com; sue@yahoo.com.

The image shows a software window titled "Notes". At the top left, the word "Notes" is displayed. Below it, there are two text input fields, each with the text "User defined" in blue. Underneath these fields are two checkboxes, each followed by the text "User defined" in blue. At the bottom of the window is a large, empty text area with a vertical scrollbar on the right side.

Any sales related account information can be entered in the Notes section.

1.1.4 User Defined

The text fields and the check boxes under notes are user definable. They can be used for any purpose. The captions (user definable) can be changed by clicking in the field. Then pull down the Configure menu and choose Configure. You can then change the caption (displayed on the screen) and the description (displayed in queries).

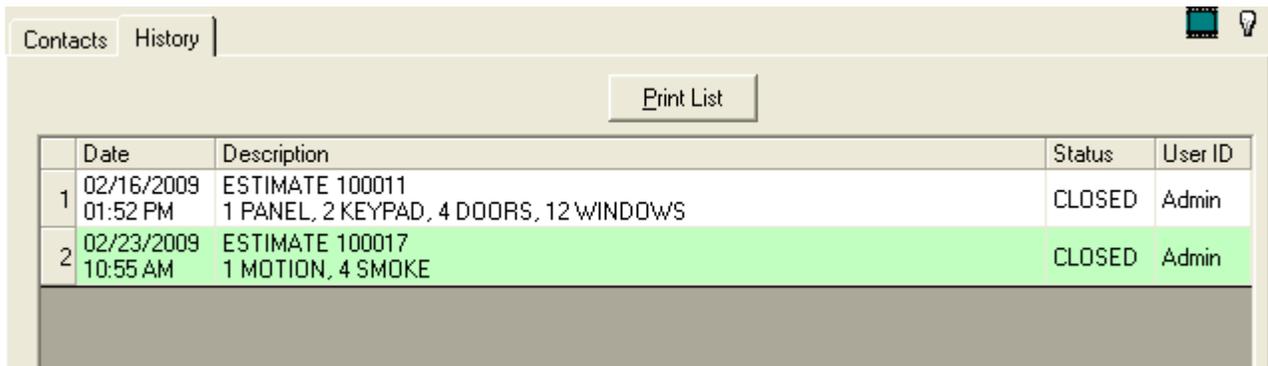
1.1.5 Notes

The large text box at the bottom of the notes frame can be used to record an unlimited amount of information for your account. Note that information entered in this field can not be included in any queries or filters.

History Tab

1.2.0 History

The History tab, shown below, shows a complete history of all estimates created for the currently displayed account. The date/time column shows the date & time the estimate was first created. The description column shows the estimate number and a brief description of the estimate. The status column shows if the estimate is open, closed or lost. The User ID column shows the name of the user that first created the estimate.



	Date	Description	Status	User ID
1	02/16/2009 01:52 PM	ESTIMATE 100011 1 PANEL, 2 KEYPAD, 4 DOORS, 12 WINDOWS	CLOSED	Admin
2	02/23/2009 10:55 AM	ESTIMATE 100017 1 MOTION, 4 SMOKE	CLOSED	Admin

The History tab on the Sales plugin shows all estimate history for the currently displayed account.

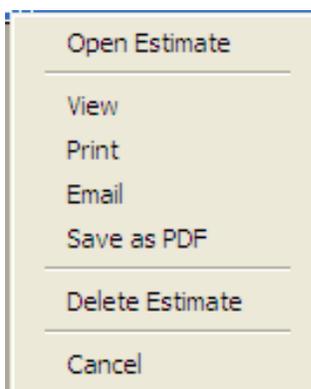
Double clicking on any of the estimates will display the selected estimate in the Estimate Pro editing window.

1.2.1 Print

At the top of the estimate window is a Print List button. Clicking this button will print all history displayed on the History tab.

1.2.2 Popup Menu

Right clicking on any estimate in the history tab will display the popup menu shown to the left. Selecting Open Estimate will display the estimate in the estimate editing window (same as double left clicking on an estimate). Selecting View will display a finished copy of the estimate. Selecting Print will immediately print the estimate to the default estimate printer. Selecting Email will immediately email the estimate to the selected account using the Email address on the Contacts tab (section 1.1.3). Selecting Save As PDF will give you the opportunity to save the estimate as a .PDF file to any specified location on your computer. Selecting Delete Estimate will delete the selected estimate (confirmation required).



Getting Started

As soon as the Sales Plugin is installed, you will be ready to create your first estimate. Just click on the Estimate Pro icon under your list of actions on the Finance Plugin (left-hand side). The Estimate Pro window will appear as shown in section 2. Just enter one or more items from your database of Products and Services. Then click the View button.

Your first estimate will display on your screen. You will see that some work will be needed to make it look more appropriate for your business.

The following five steps will guide you through the one-time setup.

1. First, you will notice that the opening and closing paragraphs contain the text “NOTE TO SOFTWARE USER”. This text is contained in the opening and the closing documents that will be used on every estimate you create. You should modify these documents by removing the Note To User text and replacing it with text that describes your company or your benefits.

2. The next thing you will notice is that there is a line on the estimate for each item you added in the Estimate Pro window. You may also notice that there are no detailed descriptions for any of the items. The descriptions are actually pulled from the database of Products and Services. You will want to go into the database to add good descriptions for everything you will be placing on your estimates. The detailed descriptions are held on the Sales tab in the Products and Services database.

3. Lastly, your estimate may contain unwanted information for each item on the estimate. You may decide that you don't want a quantity shown for each item or maybe the price for each item. You can control what prints on your estimates in the sales setup window. Refer to section 5.6 for more details.

After investing some time in these three items, you will be ready to create your own personalized estimates. Other minor adjustments may be needed such as printer selections, editor configurations, etc. All of the options are explained in detail in Sales Setup section 5.

Please see the following sections for more details on using the Estimate Pro window and configuring your Sales Plugin with the Sales Setup window.



SAFE SECURITY SYSTEMS

3333 S. Wadsworth Blvd #C-106
Lakewood, CO 80227
(800) 301-5988 Phone
(800) 336-0866 Fax
www.safess.com

2/19/2009

MR. & MRS. JOHN SMITH
3333 S WADSWORTH BLVD #C-106
LAKEWOOD, CO 80227

Dear Mr. & Mrs. Smith:

Thank you for this opportunity to provide you with this estimate. Safe Security Systems, Inc. has been protecting homes and businesses like yours in our area since 1987. Your safety is our business. After installing your system, our trained and certified installers will instruct you on its use.

1	12 ZONE CONTROL PANEL This U/L listed 12 zone control panel features remote access to help you check system status while you're away. You can even arm and disarm your system remotely. The system also includes many options including fire monitoring, medical emergency monitoring and more.	345.00
2	DIGITAL KEYPAD This easy-to-use digital keypad is what you will use to arm, disarm and monitor your system status. Built in digital displays will describe any open doors or windows that need to be shut before arming. Special keys can be used in case of fire or medical emergency. Pressing either of these keys will immediately summons the appropriate authorities.	278.00
4	DOORS PROTECTED These doors are protected from opening. If a door is opened while your system is armed, your system will sound an alarm and transmit a burglary signal to our 24-hour central station.	180.00
12	WINDOWS PROTECTED These windows are protected from opening. If a window is opened while your system is armed, your system will sound an alarm and transmit a burglary signal to our 24-hour central station. This does not protect your system against window breakage.	540.00
	24 HOUR U/L CENTRAL STATION MONITORING Our 24 hour U/L listed central monitoring station will quickly respond to any alarm signal received from your home by notifying the appropriate authorities. They will also monitor your system's back-up batteries and other conditions. Keeping you and your family safe for only \$24.95 per month. A three year agreement is required.	

Your total investment for this protection is \$1343.00. This estimate is valid for ninety (90) days. Please show your acceptance by signing and dating below.

Signature

Date

We sincerely appreciate your business.

SAFE SECURITY SYSTEMS, INC.

Estimate Pro

The Estimate Pro window is used to quickly create professional estimates and proposals. In seconds, a finished proposal can be created that will look similar to the one on the previous page.

The proposals are made up of three sections – the opening paragraph or paragraphs including the address and salutation, the estimate and the closing paragraph or paragraphs. The opening and closing sections are used on all estimates. They are created and setup using the Premier Word Processor as described below. The Estimate section is made up from the items you select in your estimate.

Here's how they work:

Opening and Closing paragraphs.

The opening and closing paragraphs can be seen at the top and bottom of the printed estimate. At the top of the estimate, the date, address, salutation and the first paragraph are all automatically added and filled in by Estimate Pro. The closing paragraph is also automatically created. In the example shown here, the program uses two separate documents. One for the opening and one for the closing paragraphs. You can easily create your own opening and/or closing documents and control their contents. The documents are managed with the Premier Word Processor action button found under the list of actions on the Sales Plugin (see Section 5). Each document can be modified to carry your own company information. The opening paragraph, for instance, could give reasons to buy from you, your mission statement, a mention of your years in business, etc. The closing paragraph could include information about your warranty, terms and conditions, how to purchase, etc. Simply modify the sample documents provided with the program or create your own. See Section 5.5 in the Setup chapter for more information about adding or changing the documents used in Estimate Pro.

Estimate Grid

The Estimate section is made up of the items you select in the Estimate Pro window. The descriptions held for each item in the database of Products and Services are automatically included. These descriptions and prices can be changed on each individual estimate. The following sections describe how to use the Estimate Pro window to create and manage the estimate section.

Estimate Pro

Client Tools: Look in: Account number: 4609

Estimate Tools: [Icons]

Date: 02/16/2009 Estimate # 100011 Status CLOSED Description: 1 PANEL, 2 KEYPAD, 4 DOORS, 12 WINDOWS

Quantity	Item	Description (short)	Description (long)	Unit Price	Total Price	Unit Cost	Total Cost	Cost Margin
1	PANEL	12 ZONE CONTROL PANEL	Edit...	0.00		0.00		
2	KEYPAD	DIGITAL KEYPAD		0.00		0.00		
3	DOORS	DOORS PROTECTED		0.00		0.00		
12	WINDOWS	WINDOWS PROTECTED		0.00		0.00		
5								
6								
7								
8								
9								
10								
11								
Totals	19				\$0.00		\$0.00	

View... Print... Email Save Setup... Close

Sub Total: \$0.00
Tax: \$0.00
Total: \$0.00

Estimate Pro
ESTIMATE AND PROPOSAL WRITER

SALES 3 Enter or edit the short description of each item.

Grid

The grid part of the Estimate Pro window is where you control the contents of your estimates. The items you add to each row of the grid will appear in the estimate section of your estimate documents. The columns that are displayed in the Estimate Pro window can be controlled in the Sales Setup window. See Section 5.2.1 for more information. Likewise, the columns that appear on your completed estimate document can be controlled in the Sales Setup window. See Section 5.6 for more information on controlling the appearance of your completed documents.

Each column in the Estimate Pro grid is described below.

2.1.1 Quantity

The item quantity should be entered for each item. The quantity will be used to calculate the various costs on the estimate. A quantity may be omitted, however, if you wish to use an additional row on the estimate to provide an additional description for one or more items.

2.1.2 Item

An item code must be selected for each item. The item code is used by the program to calculate costs and prices.

The item codes are held in your database of products and services. Each item in your Products & Services database contains additional information including prices, costs, a short description and a detailed description. When an item is selected from the products and services database, your program will automatically fill in the rest of the information on the estimate for the selected item. The default prices and descriptions can be easily edited by you after an item is selected. The changes to the prices and descriptions you make in your estimate will not change the defaults held in your database of products and services.

To add new items to your database of products and services, simply enter a new item code and then press your tab key. When your program realizes that the item code you entered does not already exist in your products and services database, the program will ask you if you want to add it now. If you choose yes, the program will display the Products and Services database for you so you can add the new item.

You can also start the Products And Services database by clicking on the Products and Services icon on the toolbar at the

top of the estimate window. See Section 2.3.7 in this chapter for more information on the Icon.

The Products and Services database can also be started by clicking on the Premier button at the bottom left-hand corner of the program.

2.1.3 Short Description

Each item you add to your estimate should include a short description. The short description can be used in several ways. First, it gives you a summary of each item you add to your estimate. Second, the short description can be included on your client's estimates.

A default short description can be entered for each item in your database of products and services. When an item is selected on an estimate, the short description is automatically added. You can change the description on your estimate at any time. Changing the description on your estimate does not change the default description in your database of Products and Services.

To modify the default description, simply click the Products and Services icon on the toolbar on the estimate window. See Section 2.3.7 for more information on the icon.

You can also bring up the Products and Services database by clicking on the Premier button on the bottom left-hand corner of the program window.

The short description column can be removed or added to the estimate window by making your desired selections in the Sales Setup window. Removing the Short Description column from the Estimate editing window does not remove the short description from your printed estimates. If the short description is removed, you will not be able to edit the default description for each item. Removing the description will, however, give you more space in the Estimate editor which could be useful when using computers with smaller displays.

See Section 5.2.1 for more information on controlling the estimate window's display.

2.1.4 Long Description

A detailed description should be entered for each item on your estimate. This description is used on the client copy of each estimate you create. The description should follow typical advertising & sales techniques including the following:

1. Focus on benefits to the client instead of features and specifications.
2. Focus on the client. Use words like "You" and "Yours" instead of "We" and "Ours".
3. Keep your client's perspective in mind. Your client wants to know what's in it for them.
4. Keep your client's reading level and comprehension in mind. Write on their level of understanding, not yours.

Each item you add to your estimate can include a default description. You can modify the description by double clicking on the description. You will receive an editor that will give you the opportunity to modify the description and the format. Modifying a item's description on your estimate does not change the default description for the item. To modify the default description, simply click on the Products and Services icon at the top of the estimate window. See Section 2.3.7 in this chapter for more information on this item.

You can also bring up the Products and Services database by clicking on the Premier button at the bottom left-hand corner of the Premier program.

The Long Description column can be removed or added to the estimate window by making your desired selections in the Sales Setup window. Removing the Long Description column from the Estimate editing window does not remove the Long Description from your printed estimates. If the Long Description is removed, you will not be able to edit the default description for each item. Removing the description will, however, give you more space in the Estimate editor which could be useful when using computers with smaller displays.

See Section 5.2.1 for more information on controlling the estimate window's display.

2.1.5 Unit Price

A retail price should be entered for each item on your estimate. This price is the retail unit price. The price will be multiplied by the Quantity (Section 2.1.1) to give a total amount which will be shown in the Total Price column (Section 2.1.6). A default unit price can be entered for each item in your database of Products and Services. The default price can be changed on each line of your estimate. Changing the price for an item on an estimate does not change the default price in your Products and Services database.

To change the default price for each item, simply click on the Products and Services icon on the tool bar on the top of the estimate window (Section 2.3.7).

2.1.6 Total Price

The Total Price is automatically calculated by multiplying the quantity times the Unit Price of each item. Changing the value in the Total Price column for one or more items will cause the program to recalculate the unit price for each item.

2.1.7 Sales Tax

Sales taxes are automatically calculated by a very sophisticated sales tax system in your program. This system can calculate sales taxes based on what you sell, where you sell it and to whom you sell. The tax percentage and tax amount are shown in separate columns. Each of these columns can be configured to either display in your estimate or not. You can control their appearance by clicking on the Setup button (See Section 2.2.5). You can find more information on controlling your program's appearance in section 5.2.1.

2.1.8 Unit Cost

The cost of each item in your estimate is shown in the Unit Cost column. The Unit cost can be adjusted for each item. Simply enter a new cost for each item if needed. Entering a new unit cost will cause the estimate system to recalculate profits and percentages.

The default Unit Cost is held in the Products and Services database. Changing the Unit Cost on an estimate does not change the default unit price. To modify the default price, simply click the Products and Services icon on the Estimate window (Section 2.3.7) or click the Premier button on the bottom left-hand corner of the program.

The total cost column can be easily added or removed from the grid in the Sales Setup window. You can bring up the Sales Setup window by clicking the Setup button (See Section 2.2.5). You can find more information on the Sales Setup window in section 5.

2.1.9 Total Cost

The Total Cost is automatically calculated by the estimate system by multiplying the Quantity times the Unit Cost of each item. A grand total of the total cost for each item on the estimate is shown at the bottom of the Total Cost column.

The total cost of each item can be manually adjusted. Entering a new total cost for one or more items will cause the program to recalculate the unit price and adjust the profit numbers for each selected item.

The total cost column can be removed or added to the Estimate system with the Sales Setup window. Click the Sales Setup icon to bring up the setup window (Section 2.2.5)

2.1.10 Cost Margin

The Cost margin for each item is automatically calculated by the Estimate system by dividing the Total Price (Section 2.1.6) by the Unit Cost (Section 2.1.8) for each item. The total cost percentage can be adjusted by simply entering a new amount. When a new cost percentage is entered, the Estimate system will calculate a new Amount for the selected item(s). The system will also automatically recalculate the profit numbers.

The Cost margin column can be added or removed from the estimate system. Simply click the Sales Setup button (Section 2.2.5). See Section 5 for more details on using the Sales Setup window.

2.1.11 – Unit Profit

The Unit Profit is automatically calculated by the Estimate system by subtracting the Unit Cost (Section 2.1.8) from the Unit Price (Section 2.1.5). The amount of profit for each item can be adjusted by simply entering a new amount. If, for example, you need to make more money on one of the items in your estimate, simply change the Unit Profit to a new amount. The Estimate system will calculate a new retail amount by adding the Unit Cost to the Unit profit. The total costs and profits will automatically recalculate.

The Unit Profit column can be added or removed from the Estimate system by clicking on the Sales Setup button (Section 2.2.5) on the toolbar near the top of the Estimate window. See Section 5 for more information on using the Sales Setup window.

2.1.12 Total Profit

The total profit for each item is automatically calculated by the Estimate system. A grand total of the profit is shown at the bottom of the Total Profit column.

The total profit for each item can be adjusted by simply entering a new total profit amount. If a new amount is entered, the program will recalculate all of the amounts in all columns in the estimate.

The Total Profit column can be added or removed from the program by clicking on the Sales Setup button (Section 2.2.5) on the toolbar near the top of the estimate window. See Section 5 for more details on using the Sales Setup window.

2.1.13 Profit Margin

The Profit Margin is automatically calculated for each item in your estimate. The total profit margin can be manually adjusted by entering a new percentage for one or more items. The system will recalculate all amounts when the Profit Margin is changed for one or more items.

The Profit Margin column can be added or removed from your estimate system by clicking on the Sales Setup button (Section 2.2.5) on the toolbar near the top of the estimate window. See Section 5 for more details on using the Sales Setup window.

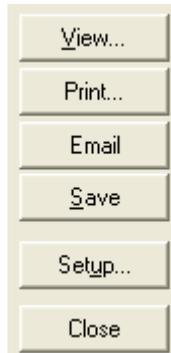
Totals

At the bottom of the Quantity, Total Price, Tax, Total Cost and Total Profit margins described in the preceding sections is a total for each column. These totals show the totals for each column for the estimate. The Cost Margin and Profit margin columns show a total cost and profit percentage for the estimate.

The bottom right-hand corner of the Estimate Pro shows grand totals for the estimate.

Command Buttons

The Six command buttons on the left-hand side of the Estimate Pro window are used to perform the most basic functions, including printing, emailing, saving, etc. The functions on all of these buttons are duplicated on the toolbar at the top of the screen. The following is a description on how to use each one.



2.2.1 View

Clicking the View button or the View icon on the toolbar will give you an opportunity to preview the current estimate before printing. This gives you the ability to see what the estimate will look like when printed. It can also help you see exactly what the estimate contains and how it reads.

The estimate will be formatted to the currently selected printer. Before creating your first estimate, it will be necessary to select a default printer. Click on the Sales Setup icon (Section 2.2.5) on the toolbar to bring up the Sales Setup window. See Section 5.7.1 for more information on using Sales Setup to modify printer selections.

Holding your mouse pointer stationary over the print button will cause a tooltip to display the current printer selected in Sales Setup.

2.2.2 Print

When clicking on the Print button on the toolbar or the Print button on the right-hand side of the Estimate Pro window, your program will send your estimate to your default printer. You can choose the default printer by clicking on the Sales Setup icon (Section 2.5.6) on the toolbar. See Section 5.7.1 for more information on using the Sales Setup window to modify printer selections.

Before printing your first estimate, it will be necessary for you to select the default printer.

Holding your mouse pointer stationery over the print button will cause a tooltip to display the current printer selected in Sales Setup.

If a document fails to print, you should first check to make sure that the printer is connected, turned on and has paper in it. Second, make sure the printer is not working "Offline" by right clicking on the printer in your computer's control panel. If printing still fails, you should try restarting your printer and your computer. If problems continue, you should consult your hardware technician.

2.2.3 Email

Clicking the Email button will automatically email a your estimate to your client. The document will be in the popular .PDF format. The client's email address must be entered on the Contacts tab on the Sales Plugin. An SMTP server and return email address must also be entered under the company setup window (Configure > Company). A CC (carbon copy) of the email can be sent to another address, usually a supervisor. The CC address can be entered in the Sales Setup window. See Section 5.8 in this chapter for more information on configuring emails.

2.2.4 Save

Clicking the Save button or the Save icon on the toolbar will save the current estimate to your database. Once saved, the document can be recalled at any time by simply double clicking on the estimate in the history tab on the Sales plugin.

2.2.5 Setup

Clicking the Setup button or the Setup icon on the toolbar (Section 2.5.8) will bring up the Sales Setup window. You can use this window to customize your Estimate system including column displays, printers, default documents and more. See Section 5 for more information on using the Sales Setup window.

2.2.6 Close

Clicking the Close button will close the current Estimate Pro window. If changes were made to the current estimate, you will be asked if you want to save the changes. Selecting Yes will save the changes and close the window. Saying No will close the window without saving.

Toolbar

The Toolbar window shown at the top of the Estimate Pro window contains many valuable functions and pieces of information. The Client Tools section is common in many parts of the plugin. This section can be used to select or navigate existing clients. The next two sections are unique to the Estimate Pro window and will be described in detail in the following sections.



The Estimate Pro toolbar contains many useful functions and pieces of information.

2.3.1 New Estimate

Clicking the New Estimate icon will give you the opportunity to close the currently displayed estimate (if any) and create a new estimate for the currently displayed client. If changes have been made to the currently displayed estimate, you will be asked if you want to save the changes before creating a new estimate. If you select Yes, your changes will be saved and a new estimate window will be displayed. If you select No, your changes will not be saved. Selecting Cancel will keep current changes and not display a new estimate.

To create a new estimate for a client that is different from the client that is currently displayed, simply click the Record Selector icon on the Client Tools toolbar. You will once again be asked if you want to save current changes.

2.3.2 Save

Saves the current estimate. See Section 2.2.4 for more details.

2.3.3 Print

Prints current estimate. See Section 2.2.2 for more details.

2.3.4 Print Preview

View the current estimate. See Section 2.2.1 for more details.

2.3.5 Delete Estimate

The Delete button on the toolbar at the top of the Estimate window can be used to delete the currently displayed estimate.

When you click the Delete button, you will be asked if you are sure you want to delete the estimate. Once the estimate is deleted, it can not be recovered.

2.5.6 Premier Word Processor

Clicking the Premier Word Processor icon will display the word Processor. This can be used to modify the opening and closing documents used by Estimate Pro. See Section 5 for more information on the Premier Word Processor.

2.3.7 Products and Services

The Products and Services database holds the details for every item you will use in your estimates. The details include a Summary Description and a Long Description of your items. The default prices and costs are also held. Note that changing the description of an item in the database of Products and Services does not automatically change the descriptions in any existing estimates.

2.5.8 Setup

Clicking the Setup icon display the Sales Setup window. See Section 5 for more details.

2.5.9 Sales Tax Settings

Clicking the Sales Tax icon on the toolbar will display the Sales Tax Settings window. This window will help summarize all of the Sales Tax Settings that are affecting taxes on your estimate.

2.5.10 Spell Check

Clicking the Spell Check icon on the toolbar at the top of the Estimate window will start the Spell Checker for your estimate. The Spell Check will check spelling in the Short Description column only.

2.3.11 Convert to Invoice

Clicking the Convert to Invoice icon on the toolbar at the top of the Estimate window will help you create an invoice from your estimate. All lines with a Quantity (Section 2.1.1) and an Item (Section 2.1.2) will be included. The estimate number and description are also copied to the invoice and set as the default description for the invoice.

When the invoice window appears, you will have the opportunity to make final changes to the invoice before printing. You can

also close the invoice window without printing or saving. When the invoice window is closed, you will be returned to the Estimate window.

2.3.12 Estimate Date

When an estimate is first created, the Estimate system will use the current date held in your computer as the Estimate Date. This date can not be changed once the estimate is created. To create estimates with a date other than the current date, you would have to change the date in your computer, create and save your estimate and then change the date back to the current date.

2.3.13 Estimate Number

When an estimate is created, your program will automatically assign a new unique number to your estimate. The number the program uses will come from the Next Estimate Number shown in the Sales Setup window. You can click on the Sales Setup icon (Section 2.2.5) on the toolbar to bring up the Sales Setup window. See Section 5.1.1 for more information on using the Sales Setup window.

When creating a new estimate, the Estimate # box will show pound symbols (#####) indicating that the estimate has not yet been saved to your database. After clicking the Save icon, your program will replace the pound symbols with a new estimate number.

Before assigning an estimate number, your program will make sure that the estimate number is unique. If the Next Estimate Number held in the Estimate Setup window has already been used, your program will use the next available number that has not been previously used.

Once an estimate is created, the Estimate Number cannot be changed.

2.3.14 Status

The status of each estimate can be controlled with the Status selection at the top of the Estimate Pro window. There are three selections to choose from:

1. Pending - indicates that your client has not yet made a decision about your estimate.
2. Closed - indicates that your client has made a purchase from the estimate.

3. Lost - indicates that the client has not and probably will not be making a purchase from your estimate.

The status of each estimate can be changed at any time by simply recalling the estimate from the History tab on the Finance Plugin (Section 1.2.0).

Reports can be printed from the Reports window (Section 4) which will list each estimate during a given range of dates and the status of each estimate.

2.3.15 Estimate Description

A brief description of each estimate can be recorded in the Description field at the top of the Estimate window. This description will display in the History tab on the Sales plugin (Section 1.2). This description is only seen by you the user. It is not printed on any client correspondence. It can be helpful if you create many estimates for one or more clients. When viewing a list of a dozen estimates for one client on the History tab on the Sales plugin, you will see this summary description of each one to help you more easily identify each estimate.

The description can be created in one of three ways. First, you can manually type a description for the estimate at any time. Second, a default description can be used. The default description is held in the Sales Setup window. The third option is automatic quantity and item number descriptions. This option will use the quantity and item number of each item on your proposal to make your description. For example, if an estimate contained three items - 3 PSC-889, 14 HIB2253 and 8 JJK2298, the program would create a description that reads 3 PSC-889, 14 HIB2253, 8 JJK2298.

You can modify the default description by clicking on the Sales Setup icon on the toolbar (Section 2.2.5). See Section 5.1.3 – 5.1.5 for more information on using the Sales Setup window.

Grid Editing Tools



Several grid editing tools can be found on the left-hand side of the Estimate Pro grid. These buttons can be used to add, delete, cut, copy and paste one or more rows. The following sections describe how to use each button.

2.4.1 Cut

Clicking the Cut button will delete the contents from the currently selected row. The contents of the current row will be

copied into the clipboard and can be pasted into any other row by using the Paste from Clipboard icon (Section 2.4.3).

2.4.2 Copy

Clicking the Copy icon will copy the contents of the currently selected row or rows. The contents of the row(s) will be copied to the system's clipboard. Once in the clipboard, you can paste the rows into any other rows in the estimate window. See Section 2.4.3.

2.4.3 Paste

Clicking the Paste from Clipboard button will paste the contents of previously selected row or rows to newly selected row(s). If one or more rows have not been previously selected, the Paste from Clipboard button will not be available.

When copying and pasting rows, it is important to understand that if two rows were selected to copy, you must select two rows in your grid to paste. If you select more rows or less rows than what was copied, you will receive a message describing the number of rows available for pasting.

2.4.4 Add

Clicking the Add New Rows button will add additional rows to your grid. To add new rows, you must first select one or more rows by clicking on the row numbers on the left-hand side of the grid. Once one or more rows are selected, simply click the Add Rows button. New rows will be added where the highlighted rows were. All lines will be moved down to make room for the new rows. This procedure does not erase any information.

2.4.5 Delete

Clicking the Delete Rows button will delete one or more selected rows. All rows that appear after the deleted rows will be moved up on the grid. Deleted rows will not be placed in the clipboard.

Before selecting the Delete Rows button, you must first select one or more rows to delete.

Word Processor

3.0 Word Processor

The Word Processor selection under your list of actions on the Sales Plugin is used to create and modify the documents used in your estimates. The word processor is used as described in the documentation for the Communications plugin.

The only difference between the Word Processor selection on the Sales Plugin versus the Communications plugin is in the Merge functions. The word processor on the Sales Plugin gives you more choices on the Merge Menu including Estimate Number, Amount, Tax, etc. Each of these estimate related items can be easily merged into any document used in the Sales Plugin including opening and closing documents for your estimates, email subject lines and email messages.

Therefore, all documents to be used with the Sales Plugin should be created with the Word Processor on the Sales Plugin.

Reports

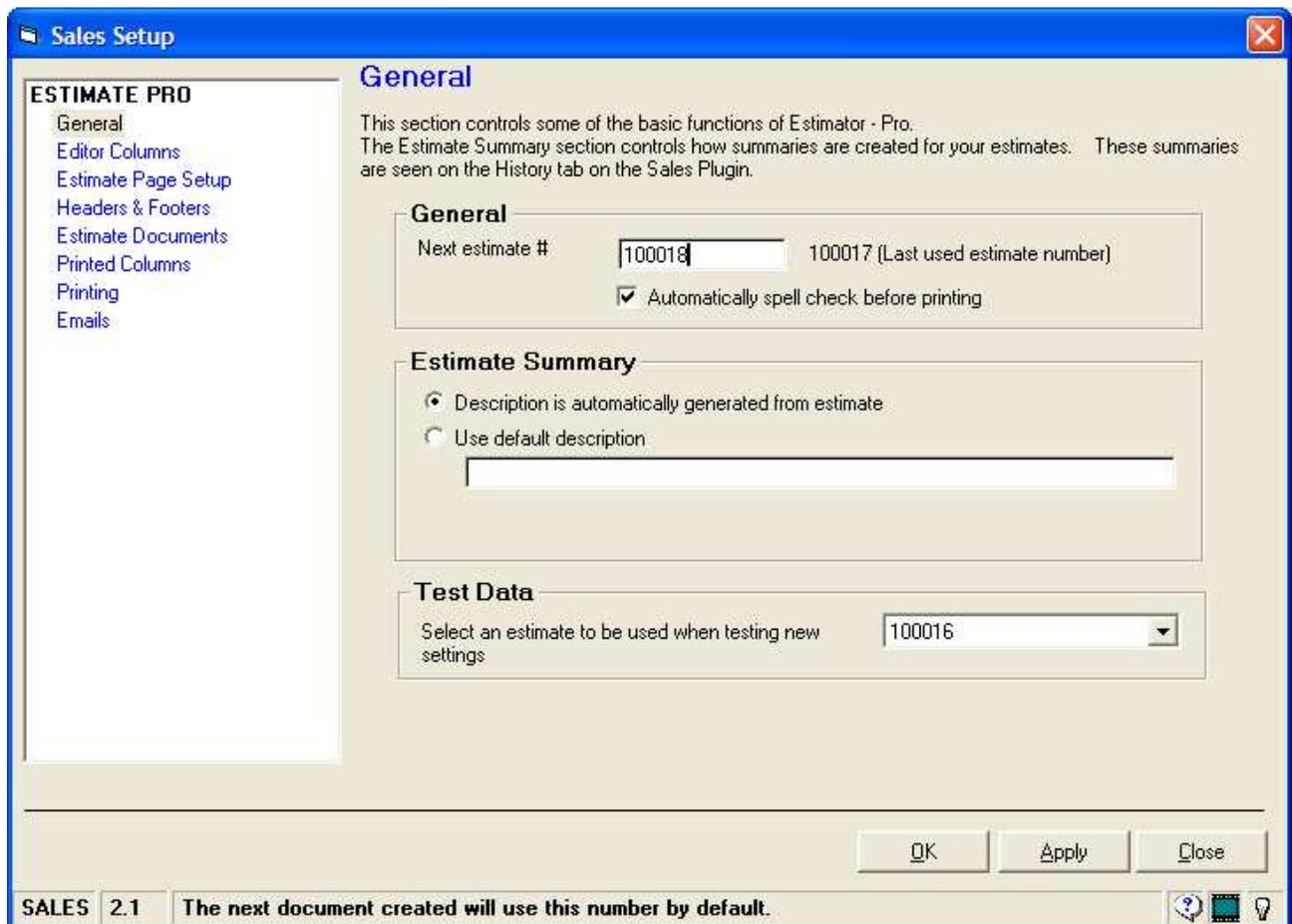
4.0 Reports

The Reports selection under the list of actions on your Sales Plugin will give you a list of all available reports. Clicking on any one of the reports will show a description of the report to the right of the report's name. The Options tab at the top of the reports window can be used to apply a query to your report. Clicking the View button on the right-hand side of the reports window will allow you to see a copy of the report on your screen before sending it to your printer.

Sales Setup

5.0 Sales Setup

The Sales Setup window is used to adjust all user-definable preferences in the Sales Plugin. The window consists of a list of sections on the left-hand side. Click on one of the sections to display the settings available for that selection. After making one or more changes in the Setup window, you should click the Apply or the OK button to save your changes. Each of these buttons and each of the sections of the Sales Setup window are described below.



The Sales Setup window holds all of the user definable settings used in the Sales Plugin.

5.0.1 OK Button

Clicking the OK button will save any changes you may have made in the Sales Setup window and then close the window. Before saving, however, the program will validate all sections of the Sales Setup window. If any problems are found or if vital information is missing, you will receive an alert and given the opportunity to correct the problem.

5.0.2 Apply Button

Clicking the Apply button will save all current changes. Before saving, the program will validate all sections of the Sales Setup window. You will receive an alert if any problems are found.

5.0.3 Close Button

To close the Sales Setup window, simply click the Close button. Any changes you have made will be discarded. To save your changes, you should first click the Apply button.

General

The General Setup window is used to establish basic settings as described in the next few sections.

2 General

This section controls some of the basic functions of Estimator - Pro. The Estimate Summary section controls how summaries are created for your estimates. These summaries are seen on the History tab on the Sales Plugin.

General

Next estimate # 100017 (Last used estimate number)
 Automatically spell check before printing

Estimate Summary

- Description is automatically generated from estimate
 Use default description

Test Data

Select an estimate to be used when testing new settings

Enter basic settings in the General Window.

5.1.1 Next Estimate Number

When creating a new estimate document, the number used on the estimate will come from this setting. When the estimate is created, the program will double check to make sure the number has not been previously used. If the number was previously used, the program will increment the number by one and then check again to make sure the number has not been previously used. The program will repeat these steps until it finds an estimate number that has not been previously used.

The Next Estimate Number shown on this screen will then reflect the next available estimate number.

5.1.2 Spell Check

The program's spell checker will automatically spell check each section of your document before printing, emailing or saving when the spell check box is selected. If the spell check box is not selected, you will still have an opportunity to Spell Check your work by clicking the Spell Check button on the Estimate Pro window.

5.1.3 Description - Automatic

When estimate descriptions are automatically generated from your estimate, the description will reflect the quantity and item number of each item on the estimate. The description will appear at the top of the estimate window. The description will also appear in the client's history on the history tab on the Sales Plugin. Once an estimate has been completed, the description may be modified by the user. Any changes to the estimate will replace user modifications with a new automatically generated description. The maximum length for estimate descriptions is 255 characters.

5.1.4 Description - Default

Selecting Use Default Description will cause the program to use the default description you enter (See Section 5.1.5) in the text box.

5.1.5 Description - Text

Each new estimate document can be given a default description entered here. This description will be used when first creating an estimate document. The description may be changed at anytime while building an estimate. Changing a description on an estimate will not change the default description in Sales Setup. The description you give to each estimate will be shown on the History tab on the Sales Plugin.

5.1.6 Test Data

Various sections in the Sales Setup window will give you the opportunity to view the effects of your changes on an actual sample estimate. In section 5.6, for example, you are given the opportunity to control which columns from the Estimate Pro window are printed on your printed copies. When you make changes to the columns in that section, you will be able to click

a test button to see a sample estimate with the new settings. The sample estimate the program will use is selected from the pull down list. The list will show all previously written estimates.

Editor Columns

5.2.1 Columns

The estimate window you use to create estimates can be configured to show just the columns you choose. In this grid, simply place a check mark next to the columns you want to use or display. Some of the columns contain information that you may not want others to see such as the cost and profit columns. Other columns may not apply to your business such as sales tax.

Editor Columns

This section gives you the opportunity to control the layout of the screen where you create your estimates. Simply place a check mark next to the name of each column that you would like to display when you create estimates. Note that an administrator level password is required to enable the cost and profit columns.

General

User interface columns

<input checked="" type="checkbox"/>	Quantity
<input checked="" type="checkbox"/>	Item
<input checked="" type="checkbox"/>	Description (short)
<input checked="" type="checkbox"/>	Description (long)
<input checked="" type="checkbox"/>	Unit Price
<input checked="" type="checkbox"/>	Total Price
<input type="checkbox"/>	Tax %
<input type="checkbox"/>	Tax
<input checked="" type="checkbox"/>	Unit Cost
<input checked="" type="checkbox"/>	Total Cost
<input checked="" type="checkbox"/>	Cost Margin

The columns that are used on the Estimate Pro window can be controlled in this section.

The columns you use to create an estimate are not the same as the columns printed on an estimate. Printed columns are controlled in the Printed Columns section in Sales Setup Section 5.6.

Page Setup

5.3 Estimate Page Setup

The page setup window is used to define not only the size of the paper you will use for your estimates but the margins as well. The margins can even be different on the first page and on following pages. This allows for letterhead which may have a higher margin on the first page and a lower margin on following pages. Header and footer margins can also be defined. These can also be different dimensions on the first and following pages.

Estimate Page Setup

This section controls how grids will appear on your printouts. The grids will contain each item you have entered on your estimate.

Paper Size		Orientation	
Paper size	Letter	<input checked="" type="radio"/> Portrait	
Width	8.50"	<input type="radio"/> Landscape	
Height	11.00"		

Margins	
Page 1 (Letterhead)	Page 2+
Top	1.60"
Bottom	0.70"
Left	1.00"
Right	1.00"
Header (from top)	1.00"
Footer (from bottom)	0.50"

Preview



The Estimate Page Setup window is used to control the size and the margins of your estimates.

5.3.1 Paper Size

Selecting a paper size is a quick and easy way to define the size of the paper to be used when printing documents. If a unique size is used, simply enter the width and height in the boxes below the paper size selection.

5.3.2 Paper Height & Width

The width and height of each document can be manually entered in this area. The width should be the narrowest portion

of the paper and the height should be the widest portion. If the page is to be printed in Landscape (printed across the widest portion of the paper), you would still enter the width as the narrowest portion. You would then select Landscape as the orientation.

5.3.3 Orientation

The orientation of the printed page can be selected as either Portrait or Landscape. Portrait is the most common selection. Portrait is like a portrait photograph where the page is standing up. Landscape is less common and looks like the paper is laying on its side.

5.3.4 Margins

The margins including top, bottom, left and right can be controlled for the first and following pages. To compensate for any additional space required by letterhead, the first page margins can be different than the following pages. Simply enter the margins for the first and following pages. Click the Page 2+ tab to enter margins for page two and beyond.

The preview shown to the right of the settings will show the approximate appearance of the pages based on your margin settings.

5.3.5 Headers & Footers

The first and following pages can have space allocated for a header and/or footer. The Header and Footer can be used to show things like a client's account number on each page or show a document name, etc. See the Headers and Footers section (section 5.4) for more information about controlling the content of the headers and footers.

Headers & Footers

5.4 Headers & Footers

Headers and footers are the small sections of text that appear at the top and the bottom of some documents. Usually, they appear on all pages. A Header, for example would appear at the top of the page. It could contain the name of the client, the estimate number, etc. A Footer, for example, would appear at the bottom of every page and would contain the date the document was created, a small tag line such as "Serving the greater tri-state area since 1987", etc.

Headers_Footers

This section controls the printer to which you would like to print your cover letters. Use the additional copies selection to print plain paper copies for your internal records.

Headers

First page
- Select -

Following pages
- Select -

Footers

First page
- Select -

Following pages
C:\App\Letter Footer.ptd

Headers and Footers for the first and following pages can be added using this screen.

The program is equipped to show a different header / footer on the first page and following pages. In the case of a header for example, you could show no header on the first page and a small header on all subsequent pages. This would be useful if the first page was going to be printed on letterhead.

The header and footer documents are created with the Premier Word Processor. They can use mail merging to embed client or system information into your headers and footers.

NOTE: When using the Premier Word program to create your headers and footers, simply create a new document and add your logo and/or company name, phone number, etc. to the top of the document. It is NOT necessary to pull down the view menu and choose header or footer. When creating footers, the text for the footers should be placed at the top of the page. Not at the bottom.

5.4.1 Documents

Documents can come from a file kept on disk or from documents saved in your database by the Premier Word Processor. Documents saved in your database are kept in a list. Click the down arrow to see a list of documents. Click the Browse button to select a document from disk. Acceptable document types include Premier Word Processor documents (.PTD), and graphic files including .JPG and .BMP.

5.4.2 Browse

Clicking the Browse button will give you the opportunity to search for and select a Premier Word Processor document to be used as a header or footer.

5.4.3 View

You can view the currently selected document by clicking the View button. The document will open up in the Premier Word Processor program. You can then view the document or modify and save it.

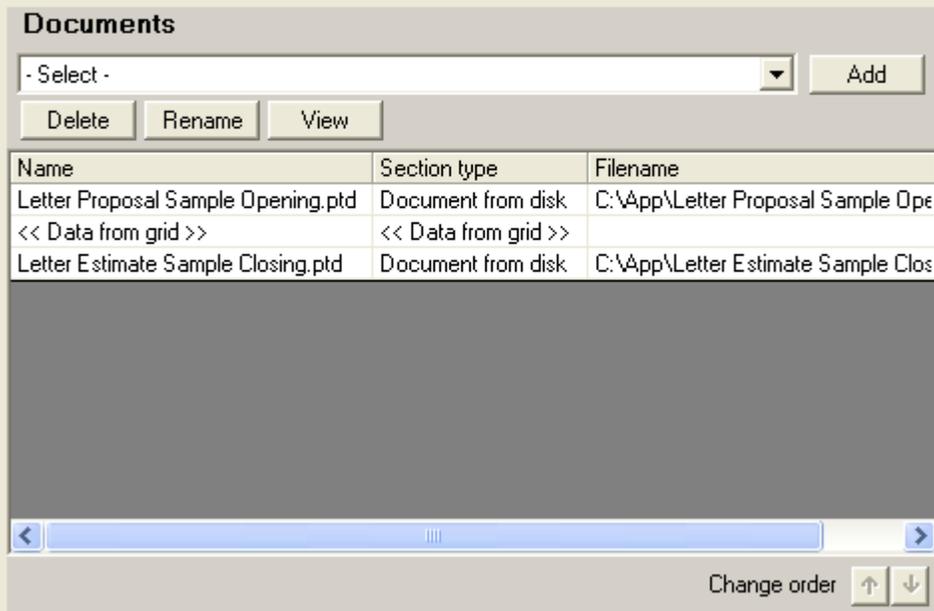
Documents

5.5 Documents

Every estimate you produce will contain multiple documents combined into a single larger estimate. In its simplest form, an estimate may consist of an introduction, data from the estimate grid entered in the Estimate Pro window and a closing. In this example, three documents would be blended into one estimate document.

Estimate Documents

This selection on the Estimator - Pro setup window is where you can control which documents will be used to create estimates and/or contracts. See help guides for detailed instructions on how to create and use documents.



The Documents window is used to control the documents that appear in your estimates and the order in which they appear.

In this section of the Sales Setup window, you can easily control how your estimate documents will be made up. First, simply select the type of document you would like to add from the drop-down list. Then click Add. If you select "Document from Disk", you will receive a window that you can use to browse for a document created by the Premier Word Processor and saved to disk. Simply use the browser to select the document and click OK. The document will appear in the list of documents near the bottom of this window. If you select "Document from Database", you will receive a list of all documents created by the Premier Word Processor and saved to your database. Simply select a document from the list and click OK.

Each document you select will have form filler capabilities to merge estimate data including totals, taxes, and more. To use the estimate merge fields, the document should be created by using the Premier Word Processor selection found under your list of actions on the Sales Plugin.

Any number of documents can be added to your finished estimate. Examples of other documents that you may want to add include a company profile, reasons to buy from you, terms and conditions, etc. Each estimate document you create can be a simple one page estimate or a multiple page document.

5.5.1 Documents

Selecting "Data from Grid" will merge your estimate data into the final estimate document.

Selecting "Page Break" will force a page break in your finished document. This is useful if you want to always print a page in your estimates such as terms and conditions on its own separate page.

It is important to realize that each document you add to your estimate will not appear on a separate page. They simply follow one after the other and wrap onto additional pages as needed. The Page Break option can be used to force additional pages.

5.5.2 Add

Clicking Add will add the currently selected document to your list of documents used in your proposals. Note that only one "<< Data from grid >>" selection can be added.

5.5.3 Delete

To delete a document from your list of selected documents, simply highlight the document with your mouse and click the Delete button. You will be asked to confirm the delete.

5.5.4 Rename

The name given to each document can be changed to make your list of documents a little more understandable. Simply select a document from the list and click the rename button.

5.5.5 View

The View button can be used to view the currently selected document. Only documents created with the Premier Word Processor can be viewed. While viewing the document, the document can be modified and saved. The modifications will be

used on all new estimates. You can also view a document in the list by double clicking on the document.

5.5.6 Order

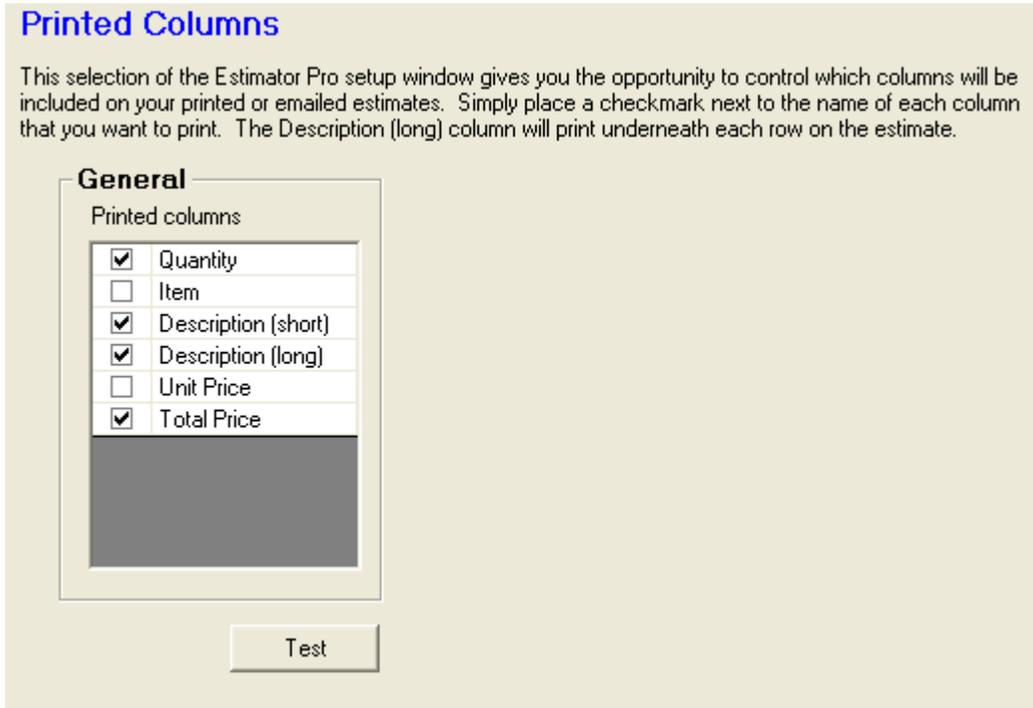
You can change the order that documents appear in the list by clicking the up or down arrows shown at the bottom right-hand corner of the list.

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Printed Columns

5.6 Printed Columns

The appearance of the items in your estimates can be controlled with the Printed Columns screen. The settings in the sample window shown below will produce the sample estimate shown on the following page.



The Printed Columns window allows you to control how the printed grids appear in your estimates.

5.6.1 Columns

The Columns included in your printed estimates can be controlled by placing a checkmark next to each column name. Since the Description (long) column can be very lengthy - up to several paragraphs in length, the column will actually print underneath all other columns.

5.6.2 Test

Clicking the Test button will display a sample estimate so you can see how changes you make on this screen will effect your estimates. See Section 5.1.6 for details on selecting a sample estimate.



SAFE SECURITY SYSTEMS

3333 S. Wadsworth Blvd #C-106
Lakewood, CO 80227
(800) 301-5988 Phone
(800) 336-0866 Fax
www.safess.com

2/19/2009

MR. & MRS. JOHN SMITH
3333 S WADSWORTH BLVD #C-106
LAKEWOOD, CO 80227

Dear Mr. & Mrs. Smith:

Thank you for this opportunity to provide you with this estimate. Safe Security Systems, Inc. has been protecting homes and businesses like yours in our area since 1987. Your safety is our business. After installing your system, our trained and certified installers will instruct you on its use.

1	12 ZONE CONTROL PANEL This U/L listed 12 zone control panel features remote access to help you check system status while you're away. You can even arm and disarm your system remotely. The system also includes many options including fire monitoring, medical emergency monitoring and more.	345.00
2	DIGITAL KEYPAD This easy-to-use digital keypad is what you will use to arm, disarm and monitor your system status. Built in digital displays will describe any open doors or windows that need to be shut before arming. Special keys can be used in case of fire or medical emergency. Pressing either of these keys will immediately summons the appropriate authorities.	278.00
4	DOORS PROTECTED These doors are protected from opening. If a door is opened while your system is armed, your system will sound an alarm and transmit a burglary signal to our 24-hour central station.	180.00
12	WINDOWS PROTECTED These windows are protected from opening. If a window is opened while your system is armed, your system will sound an alarm and transmit a burglary signal to our 24-hour central station. This does not protect your system against window breakage.	540.00
	24 HOUR U/L CENTRAL STATION MONITORING Our 24 hour U/L listed central monitoring station will quickly respond to any alarm signal received from your home by notifying the appropriate authorities. They will also monitor your system's back-up batteries and other conditions. Keeping you and your family safe for only \$24.95 per month. A three year agreement is required.	

Your total investment for this protection is \$1343.00. This estimate is valid for ninety (90) days. Please show your acceptance by signing and dating below.

Signature

Date

We sincerely appreciate your business.

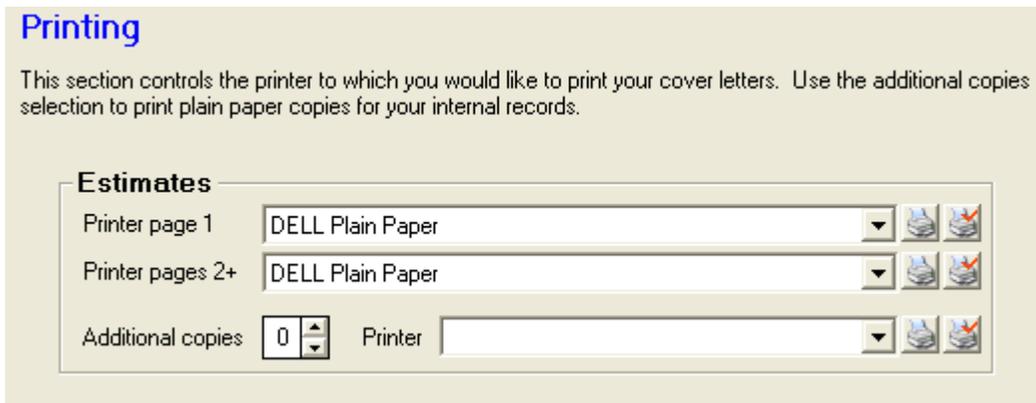
SAFE SECURITY SYSTEMS, INC.

Printing

5.71 Printers

Printing documents can be controlled with these printer selections. These selections allow for a wide range of scenarios that you may want to use. The first scenario involves letterhead. When printing on company letterhead, the first page of the letterhead will have company logo and company address information. The continuation pages are usually blank.

Because the first page and continuation pages are different, you may want to keep your letterhead in one printer or tray while the continuation pages are kept in another. In this scenario, simply select the printer that contains the letterhead in the Printer page 1 list. Then select the printer used for the continuation pages in the Printer page 2+ list.



Printing estimates using one or more printers is controlled in the Printing window shown above.

If you are printing on plain paper then you would want to select the printer where your plain paper is kept in the Printer page 1 and printer and leave Printer Page 2+ blank.

5.7.2 Additional Copies

If additional copies of your estimate are required to keep as a printed record in your files, simply enter the number of additional copies desired and the printer where the additional copies should be printed. Typically a printer is selected that contains plain paper. Using this setup, you can print customer copies on letterhead and continuation pages and print internal copies on plain paper.

When using a printer with multiple trays, simply install a second copy of the printer on your computer. Give the printer a name such as HP Tray 2. Then go into the printer's properties and

select tray 2 as the default tray. Use this printer for any function that requires printing from tray 2.

5.7.3 Test Page

Clicking the Test Page button will send a test page to the selected printer. This is useful when you want to confirm that the correct printer is selected and working.

5.7.4 Printer Properties

Clicking the Printer Properties button can be helpful if you want to view or change the settings for the currently-selected printer.

Emails

5.8 Emails

When an estimate is emailed to a client, the email is automatically created and your estimated is attached as a .pdf file. The subject line and message area of the email are completed with the settings on this window.

Emails

This section controls how emails are transmitted. In addition to the subject line, you can select a pre-written document to be included as your message.

Emailed

From:

CC:

Email subject line document

Email message document

The Emails screen lets you configure the subject line and the message area for your estimates.

5.8.1 From Address

The "From" address shown on your emails can be controlled here. If an email address is not entered, the program will use the default email From Address shown under your Company Configuration screen. The From Address will be used when a client or prospective client clicks Reply on any estimate you email.

The address can be a name such as "John Smith" or an actual email address. If a name is used, you should use the standard naming convention such as "John Smith <JSmith@aol.com>". Placing your name followed by your email address enclosed in brackets will cause your email to display your name without the email address. When the user clicks reply and replies to your email, the reply will go to the address shown in the brackets. This is the way that most email systems work.

5.8.2 CC

If you would like to receive a carbon copy (CC) of all emails you send to your clients, or if you need to send a CC to a supervisor, simply enter the email address for the CC in the CC box. Use the format described in section 5.8.1 for the naming convention. Leave the field blank if a CC is not needed.

5.8.3 Subject

The subject line is a very important part of all emails. The subject is one of the first things a recipient sees when an email is received. In just a few words the author must communicate the meaning or the purpose of an email.

In this section of the Sales Setup window, you can select a pre-written document to act as the subject line. A Premier Word Processor document is used so you can mail merge data into the subject line. The example document supplied with the program (Sales Estimate Email Subject.PTD) will simply read "Estimate ####" (where #### will be filled in with the estimate number being sent. You can modify this document to say anything else such as "Requested Estimate" or "Winning Estimate ####", etc.

The most important thing to remember is that the subject should be no more than just a few words. It has to fit on one line in an email.

Clicking the down arrow in this list will display all letter documents stored in your database. To select a file from disk, simply click the Browse button. To view the selected document, click the View button.

5.8.4 Message

The Message section on your emails should contain a brief message to the recipient. The message should be no more than one or two paragraphs in length. In this section, you may want to express your appreciation for the opportunity to provide the attached quotation, tell the client that you will follow up by phone, etc.

The document that you select for your message is created in the Premier Word Processor. Therefore, you can also merge client and/or estimate information into the message. The default document supplied with the program (Sales Estimate Email Message.PTD) will include a personalized greeting and a reference to the attached estimate.

Clicking the down arrow on the list will show all Premier Word Processor documents saved in your database (if any). Clicking the Browse button will let you find a Premier Word Processor document saved to disk. Clicking the View button will open the selected document so you can view or modify the document.