SaleSmartz Manual

Introduction

About SaleSmartz Pro

SaleSmartz Pro-The Complete Sales Solution.
SaleSmartz Pro is created for Salespeople and consists of five powerful packages in one. It is a Quotation/Invoicing Tool, a Product Manager, a Contact Database,EMail and a Time Manager.
SaleSmartz is built using the proven concepts of the people who sell. We don't want to change the way you think. SaleSmartz has been given the look and feel of familiar objects, e.g. a Catalogue looks like a Catalogue. If you use yellow bits of paper as your current Time Manager, then you have the basis of ours (with better glue...).

SaleSmartz has proven that information can be moved and viewed graphically and yet still maintain the functionality and power of an advanced database. This application is a tool for people who wish to keep track of Contacts and Customers and use these resources efficiently. It is much easier to keep existing Customers than to find new ones. SaleSmartz allows you to quickly add new Customers while managing those already included.

Quotes can be easily and quickly created for a Customer, allowing you to respond instantly to their requests. You can choose to show a Customer your Products in their own environment, using a portable computer, or your own environment, perhaps in a network. Quotes can be presented in printed form to a Customer directly, saving time spent on typing and travel. A Customer can see what they want to purchase without waiting for days. A delay gives them the chance to look elsewhere.

You are automatically reminded by a To Do Memo to call a Customer about Quotes you create. Important meetings and phone calls can also be scheduled in the Time Manager, to be brought to your attention later with alerts. Phone calls and other messages can be jotted down on simple memos, to be examined and enhanced later when you have more time.

Price Lists and Catalogues are managed and updated to show Customers your complete range of Products quickly and graphically.
Reports can be made giving you up to date information about aspects of sales, profit and even future sales projections.

This manual

SaleSmartz has been designed with many features but most importantly, to be easy to use. When you first start using SaleSmartz you probably will not want to use all of its features. The application is designed so that new features can be used when you need them, you don't have to read the whole manual before you start. Chapters and sections describing advanced features are labelled "Advanced". These areas may be read later when you feel more confident with the application.

If you wish to quickly get an overview of the use of SaleSmartz, read the chapter "Quick Reference". It describes some of the commonly used steps in this application..
The chapter "Basics" describes common components of SaleSmartz. Reading this chapter prepares you for navigating and understanding the application.

SaleSmartz is available for both Macintosh and Windows. There are only very small differences in the functionality of SaleSmartz between these two platforms, these differences are described in the related sections of this manual. Some of the picture examples in this manual may not appear exactly as on your computer but the layout and content of each window is the same for both Macintosh and Windows.

QuickReference

General

About

This chapter describes various quick steps to help you perform common tasks. It can be used as a quick and easy way to learn how the application works or as a reminder of commonly used actions.

The chapter "Concepts", describes most of the terms used in the following examples. Refer to the chapters listed at the end of each section to get more detailed descriptions and also to see the other features available in SaleSmartz.

Make a Price List

About

A Price List is used to store your Product information and pricing. Several Price Lists (perhaps for each supplier) can be used by SaleSmartz at the same time.

Process

1) Select "New..." in the "File" menu to show the "New document" dialogue.

2) Choose the "Price List" option and click "OK".

3) Name and save the new Price List.

4) Install Products in a Price List by doing one of the following:

    a) Selecting the "Import..." menu item to import Products from a text file, e.g. export of your Price List from a spreadsheet program (see chapter 17 "Importing Data").

    b) Selecting "New Product" in the "Edit" menu, type the new Product's code in the dialogue window and click "OK". Enter the Product's information in the fields in the new Product window and save.

(See chapter "Price List")

Make a Catalogue

About

Catalogues are used if you wish to group and show your products graphically. Only copies of products appear in a Catalogue. Price Lists are needed to store the original Products.

Process

1) Select "New..." in the "File" menu to show the "New document" dialogue.

2) Choose the "Catalogue" option and click "OK" to open the new Catalogue window.

3) The first page of the Catalogue is the contents. Pages can be added by selecting "New section" in the "Edit" menu and then viewed using the page switcher in the top left of the window. If "New section" is not visible, deselect any icons which you may have selected first.

4) Drag (or Copy/Paste) items from a Price List on to pages in the Catalogue.

5) Name and save the new Catalogue.

(See Chapter "Catalogue")

Make a Print Template

About

Print Templates are used to define the printed appearance of Quotes/Invoices and Catalogues.

Process

1) Select "New..." in the "File" menu to show the "New document" dialogue.

2) Choose the "Print Template" option and click "OK" to open the new Print Template window. A Print Template consists of one or many "blocks". A default block is made automatically for

the Quote/Invoice or Catalogue columns near the middle of the window. The size, border, content and font attributes can be changed for each block using menus.

3) Add new blocks of customised text to the Print Template by selecting "New template block" in the "Edit" menu, e.g. these could be the address or phone number of the Contact.
Preset text (enclosed in «») will be replaced at the time of printing with the related information from the Contact/Quote or Invoice.

4) Change the content of these new blocks by double clicking on the block and defining it using the dialogue.

5) Resize blocks by first clicking to select them, then dragging the black corners to the required size.

6) Name and save the new Print Template.

(See chapter "Print Template")

Make a Contact (Customer)

About

Contacts are files which store information about a Company and/or People. Contact information and history can be recorded in each file.

Process

1) Select "New..." in the "File" menu to show the "New document" dialogue.

2) The dialogue will open with the Contact option already chosen, so click "OK" and the new Contact window will open.

3) Additional people can be added to a Contact by selecting "New address" in the popup menu to the right of the "Last name" field.

4) Enter data into the Address fields, and save.

5) The new contact can be saved by selecting "Save" in the "File" menu. You will be presented with a dialogue which will allow you to save the new contact as a single file, or a Contact Group (many Contacts in a single file). The latter is recommended if you have a large number of Contacts i.e. more than 500.

(See chapter"Contact")
Contacts can also be imported from other applications (see chapter "Importing Data").

Make a Quote

About

Use a Quote to provide a Customer with details of pricing for selected products.

Process

1) To make a Quote, select a Contact and open its window by doing one of the following:

a) Selecting "Show Contacts" in the "Windows" menu to show the Contact List and double click on a Contact line.

b) Opening one of the Contact files on the disk.

c) Creating a Contact if necessary (See Make a Contact (Customer) section in this chapter).

2) Once the Contact file is open, click on the "History" icon to the left of its window to show the "History" mode.

3) If not already selected, select the Contact History field by clicking in it. It will then appear with an extra line around it.

4) Select "New object" in the "Edit" menu.
If a dialogue appears for the new object, click on the Quote icon. A new Quote will be created and selected in the Contact History field.

5) Products can be installed in the Quote by dragging (or Copying/Pasting) items from a Price List or a Catalogue.

6) If there is no Print Template selected, one can be chosen (or changed later) by selecting from the list of templates beside the

"Choose template" menu item in the "File" menu.

7) Choose "Print..." in the "File" menu to print out the new Quote, or "Print preview" to see the quote before printing. (See chapter "Quote", chapter "Price List" and chapter "Catalogue")

Make a To Do Memo

About

A To Do Memo is a quick note which can be used simply as a reminder or for more advanced scheduling.

Process

1) Type -T(Mac)/Ctrl-T(PC) or select "New To Do Memo" in the "To Do" menu.

2) Type a message into the new To Do window.

3) Click on the lever at the top right of the window to show more function buttons.

4) Click on the info button to change the due date and other related information.

5) "Hot links" to other information such as Contacts and Products can be created on a memo by dragging icons of these items onto the memo.

6) View To Do memos in the To Do List, Month, Week or Day windows, opened from the "To Do" menu.

(See chapter "Time Manager (Calendar)")

Basics

General

About

This chapter describes some of the basic principles used in SaleSmartz. Reading this chapter will prepare you with many of the common tools for using the functionality in each part of the application.

Documents

Most new documents are created by selecting "New.." in the "File" menu. A dialogue will appear allowing you to choose the type of document you require.

Window menu

This menu contains a list of all document windows. If any document windows are open, the current (front) window is marked with a "¯". The abbreviated window type is also shown in brackets, after the window's name.
If you are working with a large number of windows, you may wish to hide some of them. The menu item "Hide Window name" performs this action. To show a window again, select it in the Window menu or select the menu item "Show all windows" in the Window menu.
The "Show Contacts" menu item allows you to view contact lists. "Show all contacts" will show the Contact List window containing all Contacts installed in the SaleSmartz application. If you are using contact groups, then the list of contact group files will appear in the "Show Contacts" menu. Selecting one of these groups will show the window containing the selected contact group.
"Show Catalogue/Price List" will open the application's default Catalogue or Price List if it has been installed in the preferences. Other price list and catalogue files will also appear in a sub menu to the right of the "Show Catalogue/Price List" menu item. Selecting one of these files from the sub menu will open each of the Price List or Catalogue files.
"Show contact properties" will show the list of contact properties in the "Shared resources" document.

Edit menu

Addition or removal of objects (e.g. Quotes or Contacts) contained in windows is performed with this menu. There are three main actions.

1) New object. Adds an object of the type currently being worked on.

2) Edit/Open/Select object. Allow the current object(s) to be changed. The "Return" or "Enter" keys also perform this action once an object is selected.

3) Clear object. Deletes the currently selected object. The "Delete" key also

performs this action.

Other menus

Most document windows will have their own menu. These will only appear when that document window is selected and contain items relating to its window.

Access level

There are two access levels for the application, customer view and full access. The access level is changed by selecting "Full access" in the "Edit" menu. A tick, "¯", beside this menu item indicates that you are currently using the full access level.

"Full access" is used by the Salesperson to prepare and evaluate information. The customer level could be used to show the customer your Catalogue of Products and prepare a Quote for them.
The customer level restricts the type of information shown. Costs and supplier etc. are hidden with the customer level. See the preferences for additional options for the customer view level.

	Costs	Product code	Supplier
Full Access	√	√	√
Customer	x	p	p
			√ = Visible
			x = Hidden
			p = Preference

Table of user level access

A password can be used to restrict access to the "Full access" level if you wish (See section "General", chapter"Preferences").

Limits

The limit to the number of Contacts and Products used in SaleSmartz is not fixed. A Price List can conceivably contain tens of thousands of Products. Factors such as available memory and network speed will determine what are reasonable limits.
Generally text fields in SaleSmartz have no length limitations. In reality fields can contain a little more than 30000 characters. This means that text such as product codes and names have no fixed length, allowing much more flexibility.

Date/Time

Date and time formats used by this application are taken from your computer's system software (See your computer's operating manual for more information). Date and time fields are used to change time settings. These fields can be edited by clicking in the section of the date or time you wish to edit and typing the new setting. The field will "add" each keystroke to the field section to set the date. Only valid date or time settings are shown when they are being edited.
Some date and time fields have this button to the left. This button is the "Now" button and sets the value of the associated date/time field to the current date or time.

Currency and numbers

The currency symbol and number format used by this application is taken from your computer's system software (See your computer's operating manual for more information). In most computers changing the numbering system is done in the "Control Panel".

Margin

Many areas of SaleSmartz use a Margin in its calculations. Margin is used as a percentage to indicate the profit made when selling Products and making Quotes. The formula used to calculate margin percentage is:

Margin = (Sell price - Cost price) / Sell price x 100

Or if you are converting from Markup
Margin = Markup% x Cost price / Sell price

The allowable limits for Margin percentage in SaleSmartz are from -1000% to 99.99%.

All choices button

In some windows you may see this icon on a button. This is the "All choices" button. Clicking this button will set the appropriate settings to show all information available. This is used in the To Do List window and Contact History.

Display columns

In some windows (e.g. Contact List, Print Template and Price List) columns and headers are used to display information.

The type of data shown in each column is changed by clicking on the popup menus (triangles) in the right of each column heading. A list of options will appear, choosing one will change that column's data type.
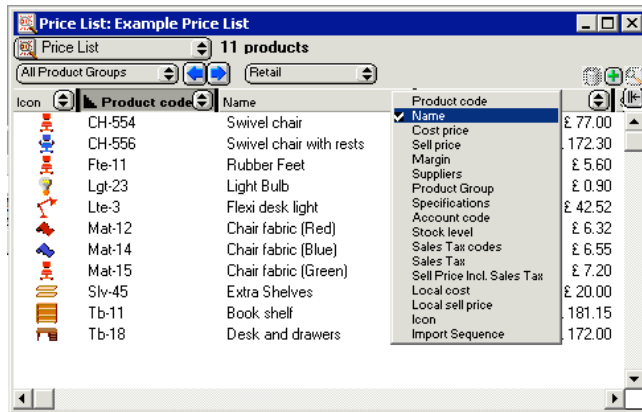
Selecting column content

Clicking on the heading text will sort the list in ascending order by that column. Clicking again will sort in descending order, and again will stop sorting. The current sort key column is shown underlined. In the figure above, the "Product code" is the sort column.

Resizing columns

Resizing the columns is performed by clicking in the grey bar at the right edge of each column popup menu. A grey line appears, showing the new column size. If the size of the column is very small, the pop up menu will be hidden, and/or the column heading text will be truncated to fit.

Resizing a column width to nothing will remove that column from display. Additional columns can be added (up to a maximum of ten columns) by clicking on the button to the right of the last column.

List buttons

Additional buttons will appear in the top right of a list. These will delete, add, or view info for an object that is selected.

Keyboard shortcuts

To speed up actions, parts of SaleSmartz have keyboard shortcuts.

The "delete" key is a short cut for "Clear" in the "Edit" menu. First select an object and then press "delete" to remove it.

The "return" and "enter" keys are shortcuts for the Edit/Open/Choose object menu item in the "edit" menu. Select an object in a window and press "return" or "enter" to perform the editing action, e.g. opening a window or showing more information. This has the same effect as double clicking on an object.

Rows in various lists (Price List, Contact List and To Do List) can be quickly shown by typing the letter of the first character of the content of the sort column. For example, in the Price List, pressing "C" will scroll and select the first Product whose name begins with "C" (assuming the list has been sorted by product name). Pressing the "Tab" key will jump to the next item beginning with that character. In this example, it would select the next Product whose name begins with "C".

Dialogues also have keyboard shortcuts. Buttons and check boxes in a dialogue have shortcuts based on the name of each item. Holding the (Mac)/Ctrl(PC) key and a character activates these shortcuts. The character to be typed is determined by the name of the button, e.g. typing (Mac)/Ctrl(PC)-C will activate a button called "Cancel".

Note: If there is more than one button whose name begins with the letter you type, then the second letter of the name is used as a shortcut, i.e. in the example

with a button called "Cancel", if there was a second button called "Choose file", you would type (Mac)/Ctrl(PC)-H to activate "Choose file".

Catalogue/Quote

About

Both the Catalogue and Quote documents use a similar book-like format. They consist of a Contents and one or more Sections (Pages).

Pages

Sections contain a list of items (Products or Bundles) in a graphical form. Each section has a name, which is edited in the field next to the Page Switcher. Adding or removing sections is performed by menu items.

Contents

The contents page shows a list of all sections.
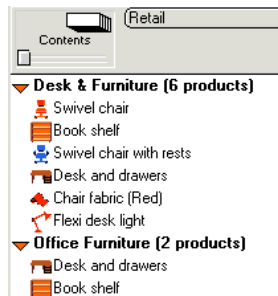
Contents page

The triangle pointing to the right, on the left of each section name can be used to show a list of the section's items. Click on the triangle, it will change to a downward pointing arrow and show the section's items. To hide the list of items, click on the triangle again, to close it.
Items can be moved within or between sections by selecting and dragging them.

Page switcher

Switching between sections is performed by the page switcher.

Page Switcher

Click on the page symbols at the top of the page switcher to move to the next or previous section . The label below this displays the current section number and total number of sections.
Dragging the knob below the label scans through all of the pages. Clicking in the drag bar will jump to the page in that position.
The name of the current section is shown and edited in the text box next to the page switcher.

Installing items

New items are placed into Catalogues/Quotes from Price Lists and Catalogues in one of the following ways:

1) Copy/Paste items, using the "Edit" menu.

2) Selecting and dragging items from other documents.

3) Selecting "Find..." in the "Edit" menu, do a find, then "Add" items.

4) Products can also be added to Quotes by clicking on the "Add" popup menu below the page switcher. This will show a popup menu with the contents of the default Catalogue/Price List file (set in the preferences).

Locating source files

Entries in Quotes and Catalogues have links to source files such as Price Lists and Catalogues. These source files may be moved or deleted on the disk. You may also just want to change all document references to another. When this happens follow this procedure:

1) Select the "Locate source documents" menu item in the "Quote" or "Catalogue" menus to open the dialogue.
"Locate source documents" dialogue.

2) The list of all source documents used in the Catalogue/Quote will appear on the left hand side of the field. To locate or change the file, double click on the line or select and click "Choose file".

3) The file selection dialogue will open to allow you to choose a replacement file.

4) Once chosen, the new file name will appear on the right hand side of the field.

5) Click "OK" to close the dialogue and put the changes into effect.

Dialling

About

SaleSmartz has several shortcuts to automatically dial phone numbers for you. This feature is available in Contact file windows, the Contact list window and To Do Memos. Clicking on the button in these windows will open the "Telephone" dialogue.
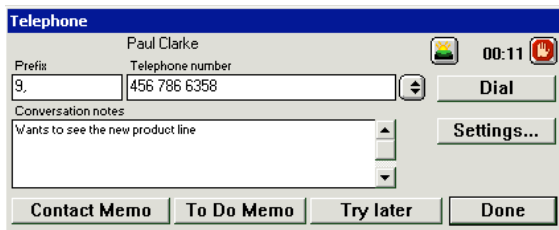
Telephone dialogue

Dial

The dial button in the telephone dialogue dials the number displayed.

Timer

The timer field will start automatically when you dial a number. You can also click on the green start button to manually start the timer. This time can then be recorded in contact memos by clicking the "Contact memo" button.

Prefix

The prefix field is set in the "Settings" dialogue and can be used for example for overseas or outside line prefix numbers.

Telephone number

This field contains the number that will be dialled when you click the "Dial" button. The popup menu to the right of this field allows you to choose other numbers if they are available e.g. this popup menu can contain the list of phone numbers for a contact, gathered from a Contact file or To Do Memo.
Note: When the "Telephone" dialogue is opened from a To Do Memo, the memo is searched for phone numbers, both in the content of the memo and in the hotlinks on the memo.

Conversation notes

When you are talking to a person, you can write notes in this field. These notes can then be converted into a Contact Memo or a To Do Memo by clicking on the buttons below this field.

Contact Memo

If the "Telephone" dialogue was opened from a contact window, or a To Do Memo with a Contact hotlink on it, then the "Contact Memo" button is visible. Clicking on this button will take the text content of the conversation notes field and make a new Contact Memo in the associated Contact.

To Do Memo

Clicking on this button will create a new To Do Memo with the text content of the conversation notes field.

Try Later

This button creates a new To Do Memo with a "Dial" hotlink. Opening the "Dial" hotlink will open this "Telephone" dialogue again, allowing you to try ringing the number again.

Settings...

The method of dialling can be set by clicking on the settings button, which opens the "Phone" section of the preferences (See section "Phone/Fax", chapter "Preferences").

Multi-user files

About

Most of the files used in SaleSmartz can be used in a network as a multi-user
system. No additional software is required to do this, just a multi user version of
SaleSmatz. To use the multi-user facilities, place the required file on a networked
shared disk which is available to all those who wish to use it (See chapter "Multi
Users").

Concepts

Quote

About

One of the main functions of this application is to supply Quotes to Customers.
This process is summarised here:
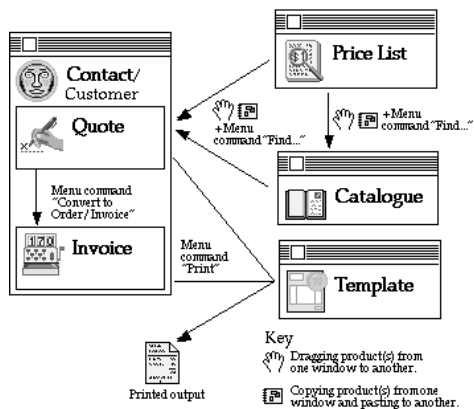
Quote flow chart

The window on the left represents a Contact/Customer containing Quotes and
Invoices. Arrows represent the flow of information, i.e.Products can be moved
from Price Lists and Catalogues into Quotes.
A Quote is first created in a Contact file.
Products/Bundles can then be added from Price Lists and Catalogues.
When complete, a Quote is printed in a format according to the chosen Print
Template.
Accepted Quotes are then converted to Invoices with the menu item "Convert to
Order/Invoice".

Price List

About

Price Lists contain the Products shown in Catalogues and Quotes. You are able to
use multiple Price Lists in SaleSmartz at the same time.
The Products in each list have various attributes, e.g. product code, name and
sell price. Catalogues, Quotes and Invoices use stored product codes to retrieve
and display Product attributes from Price Lists.
Products can be modified or imported from text files, such as exports from
spreadsheets.

Catalogue

About

A Catalogue is a collection of Products from one or more Price Lists. These
Products may be grouped together and placed on different pages of the
Catalogue. Catalogues are used to graphically group and show Products for
quick access and most importantly, show to Customers.
The Product images (catalogue entries) in a Catalogue are referenced to a
Product in a Price List by product code. When the Product or price changes, so
too does the Catalogue's entry.
Bundles of Products can also be created in the Catalogue. These are treated as
single items, with a single price but may consist of multiple Products. They can
be used to provide a "Special deal" or to simplify repetitive actions.

Print Template

About

Once a Quote or Invoice is ready, it can then be printed using a Print Template. The Print Template defines the printed appearance of the Quote or Invoice. "Blocks" can be placed on the template from various sources, e.g. Contact Address, Contact Name, current date, logos and pictures.

Contact (Customer)

About

Contact files contain information relating to a specific Person or Organisation such as Address and Call history. Links to Document files such as faxes and letters can also be stored with a Contact.
Contacts can be Customers, Suppliers and even personal contacts.
A list of Quotes and Invoices can be included in Contact files.

Quote

About

Quotes are created for Customers. They use a similar principle to Catalogues, with pages and contents, but prices are not changed automatically in a Quote. Products and Bundles can be moved into a Quote from Price Lists or Catalogues. When items are moved to the Quote, the current price and other information is copied from the Price List or Catalogue. This and other information can be updated or modified later.

Invoice/Order

About

Invoices and orders are treated as the same object in SaleSmartz.
Invoices are fixed records of a Customer's purchases, created by converting Quotes to Invoices in the Contact window.

To Do Memo

About

To Do Memos are text windows which can be used when you wish to have reminder notes, make appointments or link information together.
They can be used to store simple text or links to Contact icons or even Products.
To Do Memos can be created without closing any documents you are currently working on so interruptions can be handled easily.

Contact

General

About

Contacts are people or organisations and may be customers or suppliers. Each Contact can be stored as a separate file or in a Contact Group. The "Contact List" collects Contact files and displays them as a single list (See chapter "Contact List Window").

Separate files have several advantages. One of which is to be able to take some Contact files on a portable computer out in the field, edit them and replace them back in the office once finished. Sales staff can also swap customers amongst themselves by simply swapping files.

In order for these files to appear unique on the disk, they are renamed automatically when the Contact company name is changed and saved.
Contact groups can also be used to store Contacts. These groups can contain many Contacts and also be used to classify Contacts, such as a "Supplier" group and a "Customer" group.

If you have many contacts (more than 500) then Contact groups are recommended for Contact storage.
In the Macintosh version of SaleSmartz, each Contact is aware of its file's folder and label colour. The
Windows version also has label colours in SaleSmartz, but disk file colours are not available on a Windows
system.

Contacts can also be classified in your own way by using the variables mode.
Contact files can be shared across a network allowing multiple user access to the same file (See chapter "Multi
Users").

Menu

When the Contact file window is selected its menu will appear.

<div align="center">**Contact file menu**</div>

Show Person/Address

This allows you to display one of the people (addresses) within the contact file.

Set as default

This will set the currently viewed person, as the default for the contact file.

Set as delivery

This will set the currently viewed address as the delivery address for quotes and invoices.

Don't link eMails

This setting will prevent eMails from being linked to this contact automatically.

Copy person and address

When you select the icon of the person in the contact window (above the first name field), this item will allow
tou to copy the whol person and address, and then paste it again, or in another contact.

New Person/Address

This creates a new empty person and address.

Clone Person/Address

This creates a copy of the currently viewed person and address

Delete Person/Address

This deletes the currently viewed Person and Address

Copy all details

This menu item copies the name, address and phone numbers of a Contact person in the address mode, to the
clipboard.

Copy merge field names

The mail merge field names can be copied to the clipboard by selecting this menu item. These fields can then
be used to create mail merge templates by pasting them into a document in a word processor application (See
chapter "Mail Merging").

Move contact to...

This action will move a contact to another contact group.

Delete whole contact

This will delete this contact from the file.

Post code after town/state

The position of the post code in an address can vary for different countries. If you have Contacts in countries
where the post code position is different, then you can change the position for this Contact by selecting this
menu item. Select it once to change, and again to change back. The position of the town (state) and post code
fields in the address mode will change accordingly.
The default post code position is set in the preferences (See section "Contact", chapter "Preferences").

Has "State"

If a contact has addresses that include a State, this menu item should be checked. This adds a state field to the
address fields. If you have purchased SaleSmartz in a country that has states then this option will
automatically be marked on for all new contacts.

File label

The file label (colour) can be changed by selecting a colour from the "File label" menu. On a Macintosh, each contact's disk file can be given a label colour. This colour is shown for each contact in the contact list and in the contact file's icon on disk.

Creating

Select "New" from the "File" menu and then choose the Contact document type. Alternatively select "New Contact" in the "Edit" menu, from the "Contact List" window.

Deleting

Deleting a Contact involves deleting its file on disk or from its Contact Group. A Contact can also be deleted from the Contact List, by selecting a Contact and then selecting "Clear Contact" in the "Edit" menu.

Opening

Contact file windows can be opened by double clicking on a Contact file or alternately from the Contact List by selecting a Contact, and selecting "Open contact" in the "Edit" menu. The Contact window consists of four different data display modes. Each of these is represented by an icon on the left of the window. Clicking on the icon will show the appropriate mode.

Quotes/Invoices/Products and To Do Memos can also be dragged onto a Contact in the Contact list window to open this Contact.

To Do Memo Hot Links can also open a Contact file when double clicked (See section "Hot Links", chapter "Time Manager (Calendar)").

View options

The contact window can be viewed in several ways depending on the size of your computer screen. To change the view settings, open the "Preferences" from the "Windows" menu and select the "Contact" preferences (see section "Contact", chapter "Preferences").

You can view all contact details at the same time, or only view sections at a time by clicking on the icons in the left of the contact window.
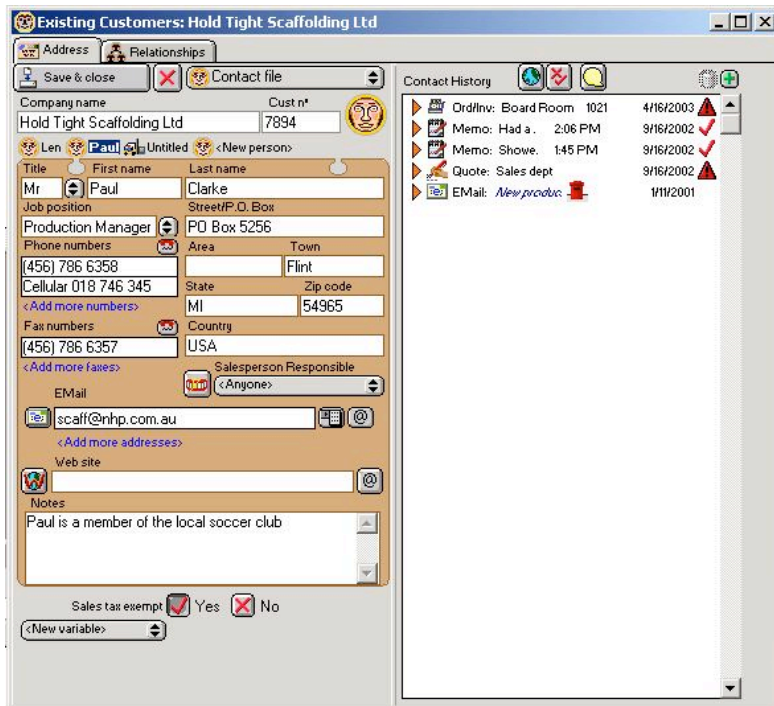
Contact window, using the "show profile/history in address mode" preferences

Address

About

General information about a Contact is shown and edited in the address mode. More than one person or address type (e.g. postal, street or visiting address) can be added to a single Contact file.

One of these people or addresses can be marked as the default. This default address will be shown in the Contact List window in the columns containing address details. The currently shown address can be selected with the popup menu to the right of the Person last name field. This popup can also be used to add or remove Person/Address types. There must however be at least one Person/Address type for each Contact file.

Contact address mode

Save and close

Save changes and close the window.

X - close

Close the window without saving.

Contact file - menu

Menu containg the Contact address mode actions.

Company Name

This is the name of a Contact's company or organisation. It is used as the Contact's file name, so must be included.

Cust no

May be used as a unique reference for the Contact, e.g. customer code or account number. This number is used as a reference when importing contacts to check if a imported contact already exists.

Contact Icon

This icon can be used to drag a reference to this Contact. Contacts may be dragged on to To Do Memos to create Hot Links to the Contact (See section "Hot Links", chapter "Time Manager (Calendar)"). They can also be dragged into Product Info windows to link suppliers to a Product.

Person/Address selector

Underneath the Company name field, there is a list of the addresses included in the contact window. You can choose to show each of these people/addresses by clicking on each of the names.

Title

The title of the person, e.g. Mr., Mrs. or Miss.

Person first name/Person last name

The name of your Contact people at the company or a type of address.

Job Position

The job title or position of the selected contact person.

Phone numbers/Fax numbers

Contact phone and facsimile number(s). These fields will accept both number and characters. These may consist of 1 or more numbers each.
The button to the top right of each of the phone and fax fields allows you to quickly ring the numbers in these fields (See section "Dialling" in chapter "Basics").

Address

The address field format is flexible, if you wish to ignore fields in the address then just leave them empty.

Street/P.O. Box

The first line of the address for the selected Contact person.

Area

The second line of the contact address, if used.

Post Code

The postal or zip code for the address. The placement of the postal code is determined in the preferences. You can choose to have it before or after the Town field.
Note: SaleSmartz automatically fills empty town and/or state fields while you type into the post code field. The text for the town/state fields is taken from other contacts with the same post code or from a database if you have an appropriate "Plug-in" file.

Town

The town, city or district for the address can be entered in this field.

State

If the contact's address contains State then this field can be used. Select the menu item "Has State" in the "Contact file" menu to show/hide this field. If you purchased SaleSmartz in a country that has states, the State field will be automatically shown for all new contacts.

Country

This field can be used if you have multi national contacts.

Salesperson Responsible

The name of the salesperson that is responsible for this Contact may be entered here if there are a team of salespeople. This will appear on the printed Quote or Invoice if required and also on reminder To Do memos about Quotes or Invoices.

EMail

The EMail address(es) for this person or company can be included in this field. You can add more addresses by clicking on the "Add more addresses" link. Clicking on the button to the left of this field will create a new eMail message to this address. For the 2 buttons on the right, the first will add this email address to the list of shortcut addresses in the eMail window, beside each address. The 2nd button is the "Own domain name" button which will specify that the domain name in this eMail belongs to this contact so all eMails from this domain will be linked to the contact.

Website

The website for this person or company can be included in this field. Clicking on the button to the left of this field will open the website in your broswer. The button to the right of this field is the "Own domain name" button which will specify that the domain name in this website belongs to this contact so all eMails from this domain will be linked to the contact.

Notes

Your comments and reminders for the selected Contact person. This field is hidden when not using "Full access" level.

History

About

The Contact history mode displays a list of correspondence and events for each Contact. Each entry in the history mode is sorted in descending order of importance and time.
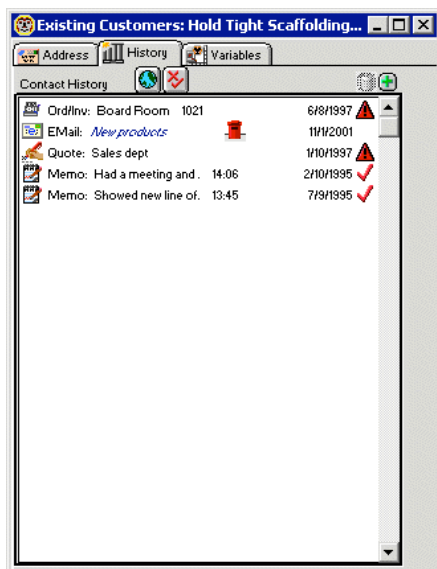
Contact history mode

When no history entries are selected, the history mode appears as a large list of entries. The entries consist of Quotes, Invoices, Memos, EMails and Documents.

Filtering is provided by the filter button above the list. This will show the Filter window.
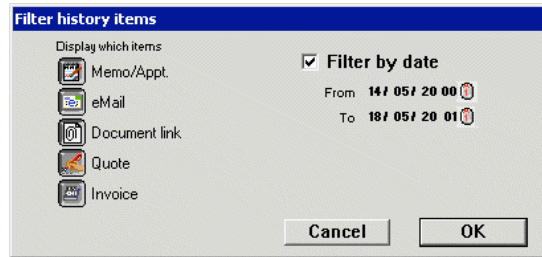
Contact history filter dialog

Five buttons to the left of the list provide a filtering function for the display. Each button represents a type of history entry.

Clicking one or more of these buttons on will include that type in the history list. Clicking on the "All" button at the top of the list will show all types at the same time.

Each history entry has its own editing panel. This panel is shown and the size of the history list is reduced when you select the entry you wish to work with.

Quote

If you sell goods to a Contact, you can show them your Products and prices using the Quote function. Quotes for customers are created and edited in the history mode. Later they can be converted into Invoices. To Do Memos are automatically created as reminders in the To Do List for each Quote which has been created. These To Do Memos will appear on the due date of the Quote to remind you to ring a Contact regarding this Quote. Summary information about each Quote is shown in the Contact history field. The due date is shown to the right. If the due date is overdue then a warning symbol will appear beside the date.

Invoice

An invoicing facility is provided for each Contact. Invoices can only be created by converting Quotes using the "Convert to Order/Invoice" menu item. Reminders are included in the To Do List for Invoices that have not been paid or sent to a Contact.
An Invoice shown in the history list will appear with its name, invoice number, and the status to the right of the line. The status will be either:

a) Whether or not it has been sent to a Contact.
b) The Payment due/made date. A warning icon will show if an Invoice is overdue.

Memo/Sheet

Reminders and a history of communication with the Contact can be kept in the Memos section. These can also be used as a call history. Memos that have not been marked as "Done" have reminder To Do Memos automatically recorded in the To Do List.
A Memo can also take the form of a call sheet by clicking on the "Call sheet" button in the Memo editing panel. The Call sheet will then show the word "Sheet" at the beginning of its line in the history field.
A Memo entry in the history list will display the first line of text in the Memo. It will then display the due/completed date and a status icon.
A tick will be shown when it has been done, a phone will appear when it has not been done and a warning icon will be shown when a Memo is overdue.

EMail

EMails can be stored in the contact history. These can be optionally linked to contacts when you send or receive an eMail with this contacts eMail address in it. This optional linking is set in the Preferences (See section "EMail", chapter "Preferences").
EMails can also be stored with a contact if you send a template eMail to the contact

Doc

Files can be linked to contacts, these can include letters, faxes, maps, brochures or any other file found on a disk.

Creating entries

New Quotes, Memos and Document links are created by choosing from the "New object" menu item in the edit menu.
They can also created by selecting "New object" in the "Edit" menu. A dialogue will appear.
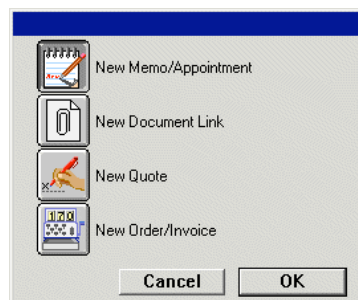
New Quote/Memo/Document link object dialogue

Once created, a new history entry will appear as an untitled item and select the correct editing panel for that item.

Invoices are created by converting a Quote to an Invoice using the menu item "Convert to Invoice". A dialogue will appear requesting an order number. After typing a number to confirm the order the new Invoice will be created and selected. An option to keep the old Quote once converted is provided in the preferences.

History objects can be dragged between Contact file windows to create new entries in other Contact files.

History entries can be duplicated by selecting "Duplicate" in the "Edit" menu.

Deleting entries

History entries are deleted by selecting the entry in the history list and then selecting the "Clear object" menu item or pressing the "Delete" key.

Editing entries

Click on a history entry to edit it. When selected, a panel will appear to edit that entry. A different panel will appear for each type of entry.

Quote panel

Quotes are editing using this panel in the Contact history mode. When a Quote is selected in the history mode, this panel will appear to show the Quote's information.

See chapter "Quote" for details on editing and printing Quotes.
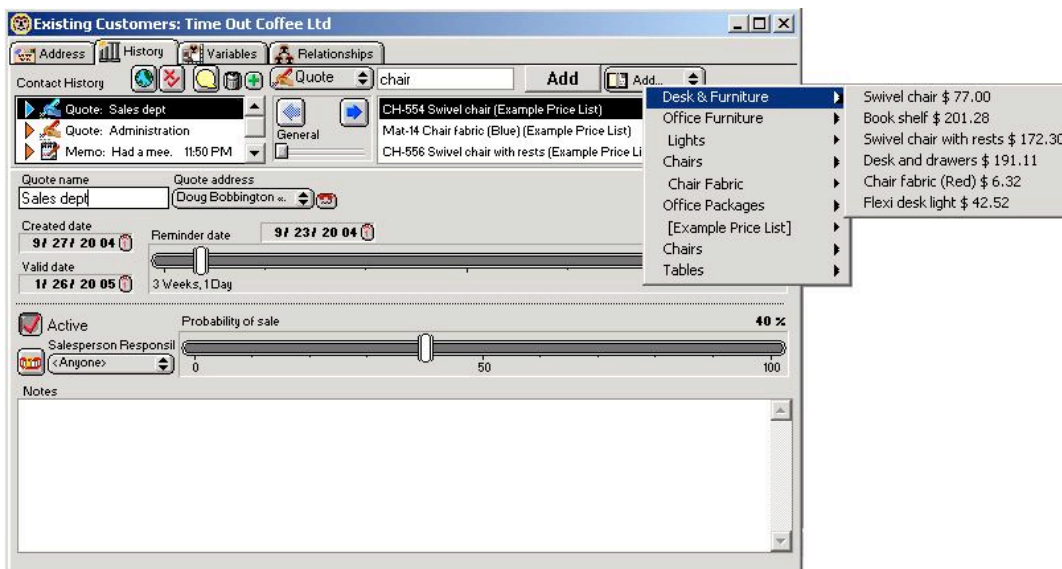
Quote editing panel

Invoice panel

Once an Invoice is selected, this panel will be shown with its details.

For more information on editing and printing an Invoice, see chapter "Invoice-Order".

Invoice editing panel

EMail panel

The EMail editing panel shows selected eMails. For more information on this editor, see Chapter "EMail".
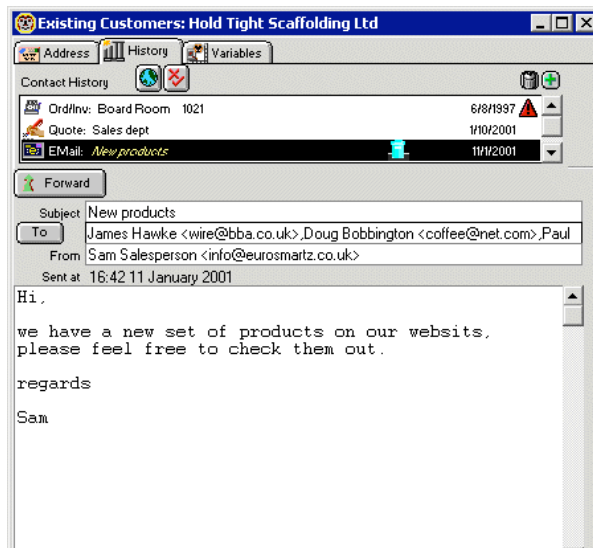
EMail editing panel

Memo panel

Reminders and a history of communication with the Contact can be kept in the Memos section. Memos are different from To Do Memos, but a To Do Memo reminder will be created automatically for a Contact Memo if it has not been marked as "Done".

Memo editing panel

Done

If the Memo has been completed the "Done" button can be set. This changes the status of the Memo from a reminder to a record of communication.

Call Sheet

Clicking this option on will change the memo into a "Call sheet". A call sheet allows you to define an objective and a result for a sales call.

Memo icon

The Memo icon acts as a dragging object for a memo. Drag this icon to move a reference to this Memo to another window.

Completed

These date and time fields indicate the date of the memo, either the due date for memos not yet done, or the date when contact was made.

Created date

This indicates when the memo was created. This field is optional and set by preferences (See section "Contact", Chapter "Preferences").

Optional indicators: These options are available when the preference is set (See section "Contact", Chapter "Preferences").

Incoming/outgoing

The speach and ear icons indicate if this was an incoming or outgoing call.

Chargeable

This button indicates if the memo relates to a call that is chargeable to your client. This can be used later in reports for billing.

Hours/minutes

These fields record the duration of a call.

Concerning

This popup menu allows you to relate a memo to a person in the contact file.

Dial button

This button allows you to quickly dial the number of the selected person.

Salesperson responsible

This field allows you to allocate or record the memo for another person in your company.

Memo content

This field shows the text content of the Memo.

Docs panel

Documents of various types can be linked to the Contact such as faxes, maps and letters. Merged letters can also be automatically linked to contacts.
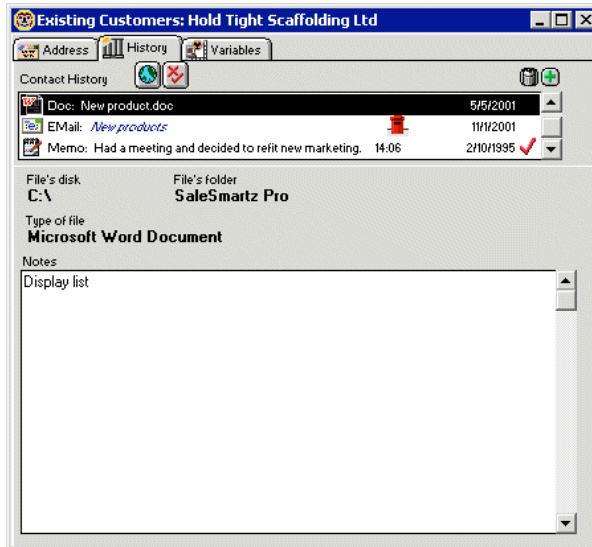
Contact Docs panel

Variables

About

The variables mode of a Contact contains the classifications you use to describe your Contacts in more detail. You can use these classifications in reports or to simply show more information about each Contact. An example of this is to have variables called "Customer" and "Supplier" which can be used to class Contacts into groups.

These classifications or properties are created in the default Shared resources Document ([See chapter "Custom Variables"](#)).
When you place a link to a Contact property into the Contact profile mode, the variables code is used as a reference to the original variables in the properties document. Any changes to properties in this document will be reflected in the Contact variables.
Warnings will appear to notify you if properties used in this Contact's variables mode have been deleted or changed from the variables document. You should then check to be sure the linked variables are still valid ([See chapter "Custom Variables"](#)).
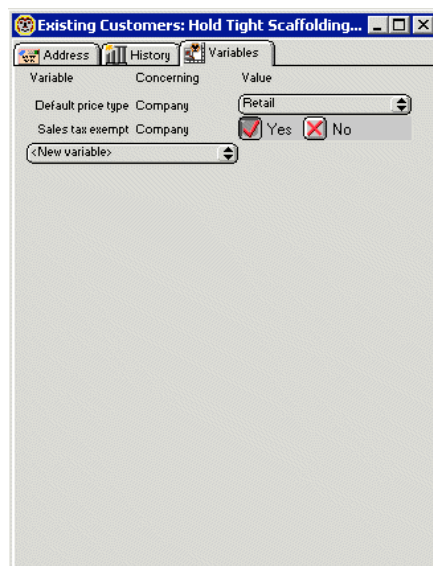
Contact variables mode

Creating variables (classifications)

As mentioned before, profile properties are created in the Custom variables window. These properties can be linked to a Contact to create classifications in several ways.
To add a variables to the list, choose from the "New variable" popup menu.
New variables can also be dragged from a Custom variables document. Select "Show Custom variables" in the "Windows" menu. Drag a variable from this window to add it into the variables mode of a Contact.
You can also click to select the "Variable" field and select "New variable" in the "Edit" menu. A dialogue will

appear allowing you to select the desired property and add it. The variables shown in the dialogue are listed from the application's default Shared Resources Document.

Deleting variables

Property links are deleted from the Contact profile mode by selecting the property name and selecting "Clear property" in the "Edit" menu or pressing the "Delete" key.

Relationships

About

The relationships panel displays relationships between different contacts and companies.
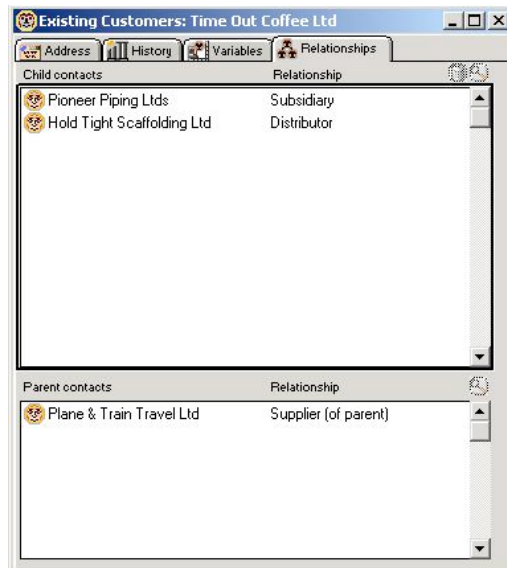
Contact relationships mode

Child contacts

This list displays all contact files that have a child relationship with this contact/company. You can drag contacts from the contact list or other areas to this list. Click on the relationship column of the contact to rename the relationship.

Parent contacts

This list displays all contact files that have this contact as a child relationship.

Multi-user

About

Contact files can be used in multi-user system by placing its file on a shared disk accessible to those who wish to use it (See chapter "Multi Users").

ContactListWindow

General

About

The Contact List collects all of the Contact files together and displays them. The list is shown by selecting the "Show Contacts" menu item, or opening the "Contact List" file on disk.

(Advanced)

SaleSmartz scans its own folder for Contact files. Folders within this folder will also be searched, as will aliases/shortcuts to other folders and Contact files. This scan can be done automatically when the contact list window is opened or manually by choosing "Re-scan" in the "Contacts" menu. This

option may take some time when opening the Contact list window, especially for network based systems.
A second option for Contact file scanning is also available. This option continuously scans the Contact files and folders when the Contact list window is open. Contact files which have been outdated or can not be found appear in italic text style in the contact list.

Both of these options can be set in the preferences (See section "Contact", chapter "Preferences"). Contact file scanning is important to keep the contact list information up to date.
If you are using a file server or shared disk with Contact files stored centrally on it, place an alias/shortcut pointing to the folder containing the Contact files, inside the application's folder.
Note: Be sure only to include an alias/shortcut to folders required. An alias/shortcut to a file server will cause the whole server to be searched for Contacts, which could take some time. It is recommended that 50 or less **individual** Contact files be placed in each folder, the does **not** apply to **Contact group files** which can contain many thousands of contacts. This is purely for speed reasons when scanning for Contact files in a network.

Once a folder is used in a search, it will be remembered for later searches. This means that a folder can be taken out of the application's folder and will still be searched for Contact files. If you don't wish this to happen or you feel there are too many folders being searched, you can reset the list of searched folders by choose "Rebuild contact list" from the "Contact List" menu.
Once reset, the folder search will only look for folders and aliases/shortcuts in the main folder again.

Window
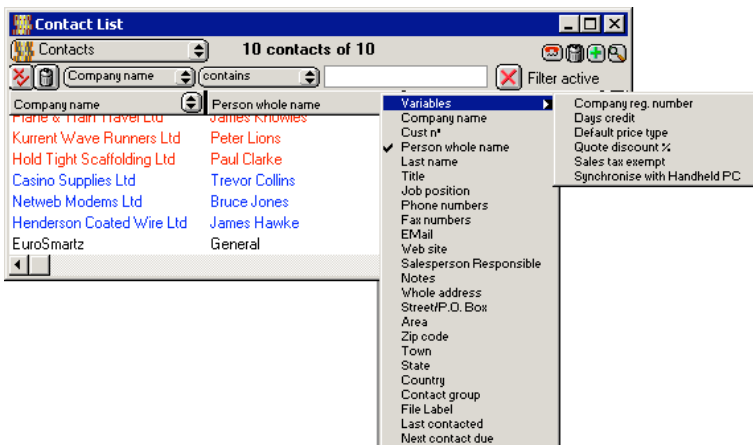
Contact List window and column menu

If you choose to use Contact properties in the Contact Profile mode, these values can also be shown in the Contact List columns.
When you choose the content of each column from the popup menu, the "Profile" sub menu contains all of the application's Contact properties.

Filter

The filter button in the left of the window allows you to filter the contact list according to your search criteria. You can choose the column you wish to use for the filter, a comparison type, and a comparison value. Clicking on "Filter active" will put the filter in effect. You can add multiple filters by clicking on the filter button again.

Dial

The small button to the left of the "Lock sorting" button in the top right of the contact window can allow you to quickly dial the phone number of one of the selected contacts in the contact list.

Menu

The Contact List menu will be shown when the Contact List window is selected.
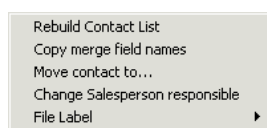
Contact List menu

Rebuild Contact List

As mentioned before, a scan of the application's folder is made for Contact files. If you have added or moved files while the application was running then you may need to use this menu item. It re-scans the disks for Contact files. This can also be used if you think there are some contacts not showing.

Copy merge field names

The mail merge field names can be copied by selecting this menu item. These fields can be used to create mail merge templates (See chapter "Mail Merging")

Move contact to...

You can move selected contact files to Contact groups or folders on your disk by selecting this menu item.

Change Salesperson responsible

This will change all of the selected contacts and their history items to show a new "Salesperson responsible". This can be used to allocate contacts a different salesperson, e.g. if a salesperson leaves your company.

File label

Each contact's disk file can be given a label colour. This colour is shown for each contact in the contact list and for a Macintosh, in the contact file's icon on disk. This file colour can be changed by selecting a colour from the "File label" menu or on a Macintosh, by using the "Label" menu in the "Finder".

"Contact Summary" File

A file is created as a buffer for the Contact List, you don't have to do anything with this file. It is created automatically when you open the List and is called "Contact Summary". This file speeds up the loading of Contacts. You can remove this file if you wish, the information contained in it can be recreated automatically by the application after scanning the its folder and reloading Contacts.

Opening

The Contact List is opened by selecting "Show Contacts" in the "Windows" menu. If there have been many changes to the search folder structure or the Contact List file has been removed, a longer delay will occur when opening the Contact List window, as the Contact files will be loaded.
This will only happen the first time the window is opened after these changes. Once opened, the Contact List will then save the new changes in the Contact List file to speed up the opening of the window next time.

Importing

Contacts can be imported from another application's exported text file by selecting "Import contacts" in the "File" menu when you have the Contact List window open.
Contact files will be created and saved in a folder called "Imported Contacts". This folder will appear in the same folder as the application (See chapter "Importing Data").

Exporting

Contacts can be exported to a text file or using a translator for use in other applications by selecting "Export contacts..." in the "File" menu when the Contact List window is open (See chapter "Exporting Data").

Quote

General

About

Quotes are linked to Contacts and stored in the Contact file. They have the same book-like structure as Catalogues.
Quotes can contain Products from Price Lists and/or Bundles from Catalogues in the form of Quote entries. These Quote entries are still referenced to the source files (Price Lists or Catalogues) of each Product or Bundle.
Costs, discounts and finance can be added if required.

Creating

Quotes are created in a Contact (See section "History", chapter "Contact").

Fixed quoted prices

All Quote entries placed into a Quote will copy the latest price at the time of the transfer. The quoted price will then be fixed until you wish to change it. The same is true for the name of the entry.
If the quoted price differs from the listed price (in the Price List for Products, or Catalogue for Bundles), an indicator will appear to the left of the quote entry (described later).
An indicator will also appear if the listed price is unavailable, e.g. the Price List is closed, or if the Product is no longer in the list.

Parts

A Quote contains several parts: quote editing panel, goods, costs and profit modes. The page switcher in the top right of the Contact file window allows you to view each of these parts.
Each part of a quote is described in the following sections.

Menu

A Quote has its own menu visible when the window is selected.

```
Print Preview...          Ctrl+R
Convert to Order/Invoice
Quote discount...
Add miscellaneous...
Clean up
Update all prices
Set Quote finance
Sections as complete quotes

Open source info
Show specifications

Open source documents
Set source document
Locate source documents
Check source documents
```
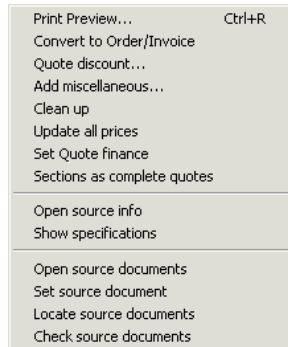
Quote menu

Print preview

Add miscellaneous...

Selecting this menu item will allow you to create a new Quote entry which does not exist in a Price List. For example, this can be used to add products which you do not sell very often, or which have no real price.

Clean up

Arrange the Quote entries when in section/graphic mode.

Update all prices

Change the quoted price of each of the entries in this Quote to the current sell price of the source object in the Price List or Catalogue. This action requires all source documents to be open and will open these before continuing.

Set Quote finance

This item is used in the "Costs mode" and changes the finance type for a Quote.

Quote discount

This menu item allows you to change the discount for the whole quote.

Sections as complete quotes

This menu item indicates how sections are used in a quote. You can use sections to display several alternatives or options for a customer.
Normally all sections are totalled together in a quote. If you choose the "Sections as complete quotes" option, each section is treated as a single quote, and the totals are shown after each section when printed.

Convert to Order/Invoice

This menu item is used to convert a Quote to an Invoice in the history mode.

Open source info

Open the info window for a selected Quote entry's source Product or Bundle. This is opened by the Quote entry's source file (Price List or Catalogue).

Show specifications

Shows the selected quote entry(s) specifications when printed.

Open source documents

If source documents (Price Lists/Catalogues) for any of the quote entries are closed, this menu item will open these source documents. These documents will be opened but hidden and can be seen in the "Windows" menu.

Set source document

Sets the source document for each of the selected entries via a file dialogue.

Locate source documents

If some of the source files have been moved or deleted from a disk, this menu item will open a dialogue to locate the correct source file (See section "Catalogue/Quote", chapter "Basics").

Check source documents

Checks all of the Quote's source files to make sure they are open or on disk.

Quote editing panel

Quotes are created and edited within the history mode of the Contact file window. When selected, a Quote will display its first page which contains scheduling and other information. Other parts of the Quote can be shown using the Page switcher in the middle of the Contact file window.
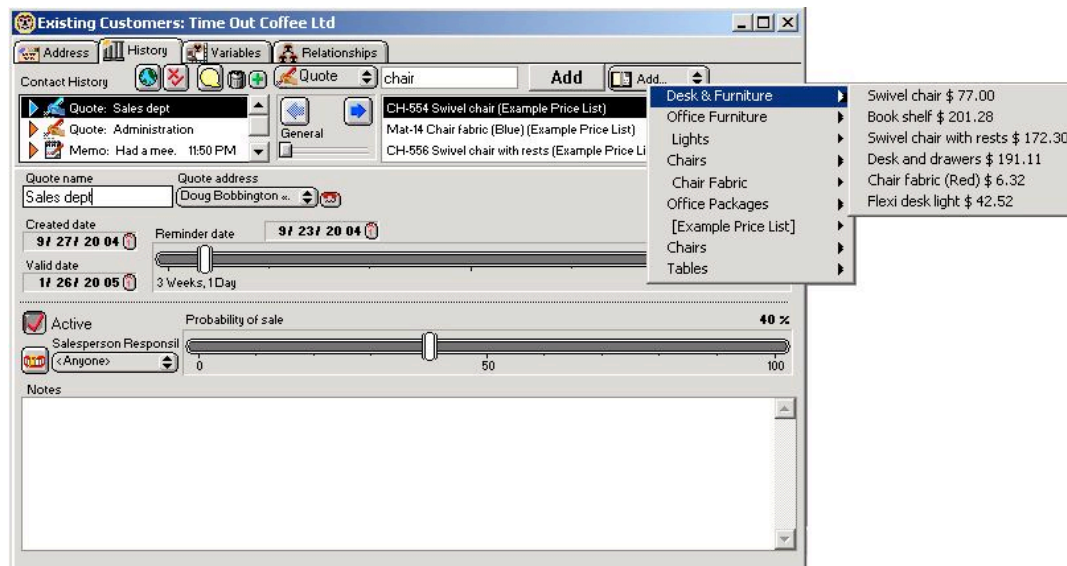
Quote editing panel

Quote - menu

This menu contains the actions for a quote

Search field

This field allows you to quickly find products or bundles in your price lists and catalogs. Enter some text in this field and the search with bring back a list of items that match the text with the product code or name

Add

This button will add any selected lines from the search (above) to the quote.

Add - menu

This menu contains a list of products and bundles from your price lists and catalogs that you can add by selecting the item.

Page switcher

In the middle of the window is a page switcher. This navigates through the Quote (See chapter 5. "Basics chapter").

Sales Reminders

As each Quote entry is added to the Quote, a reminder can appear in the "Sales Reminders" field.
Each Product or Bundle can have a "Sales reminder" property (See chapter 7. "Product", chapter 9. "Bundle").
If this field is filled with text such as suggestions for cables, batteries or other related components, this text will appear in the reminders field in the Quote when the item is installed. This field automatically scrolls to show the latest text. This text is not stored with the Quote and is cleared each time the Quote is closed.
When a reminder includes a Product/Bundle code link, click on the link to open the "find" dialogue. The code will be entered automatically into the value field of this dialogue. In most cases you will then simply press the return key three times to add the link. Once to find, once to add and lastly to close the "Find" dialogue.

Quote name

Quote names can be changed by first clicking on the Quote in the list and then changing the text in the name field at the bottom left of the list.

Quote address

The Contact address used in Quotes can be set by selecting an item from this popup menu.
This address will be used in the fields in the Quote's chosen Print Template that are preset with the Contact address details, e.g. whole address or town. The "Default Address" will use the address marked as "Default" in the Address mode.

Quote Icon

The Quote icon acts as a dragging object. Dragging this icon will transfer the details of this Quote to another window.

Dates

There are three date values for each Quote which you may use if you wish. All of these dates can be printed using the quote's print template.

    1) **Date quoted**. The creation date of the quote

2) **Valid until**. The date that the Product prices or offer expires.

3) **Reminder date**. The date you expect the customer to purchase the Products listed in the Quote.
The expected acceptance date (due date) is shown in a date form. This information is used to provide automatic To Do Memo warnings that a Quote is due, and also for sorting of Quotes. The date can be changed by clicking on a part of the date field and typing the required number. The waiting time is shown below this field (in years, months, weeks and days) as the date is changed.
The other method of setting the due date is to drag the slider. This will change the date according to the position of the slider. The maximum position of the slider can be set in the Preferences (See section "General", chapter "Preferences").
Note: It may not be possible to choose an exact date with the slider if the maximum position is a large number, as the smallest division will be greater than a day. Use the date field to choose an exact day.

Active

Not all Quotes are accepted by a customer, if you find that a Quote has been rejected then you can click the "active" button off. This shows the Quote in a deactivated state and removes any reminders from the To Do List.
The reason why you may wish to mark a Quote as inactive instead of deleting it is for historical reasons. You may want to build a report at a later date to evaluate how many Quotes were accepted.

Salesperson responsible

This field allows you to allocate or record the quote for another person in your company.

Probability

The expected probability that the Quote will be accepted can be shown using the "Probability slider". This value is used in summary reports. Dragging the slider to the required position sets the value, from 0 to 100%.

Notes

Notes for each Quote can be entered in the "Notes" field. These can describe the situation for the Quote, and other details.

Goods mode

About

The goods mode of a quote contains the list of products which you wish to present to your customer.
A quote can contain several sections which contain products. These sections can act as groupings, such as when quoting for departments in a company. Sections can also act as individual quotes when you select the "Sections as complete quotes" option in the "Quote" menu. This option is useful if you wish to show a customer several configurations of products in the same quote.
The goods mode contains a contents page which is in turn followed by each section in a graphic view.
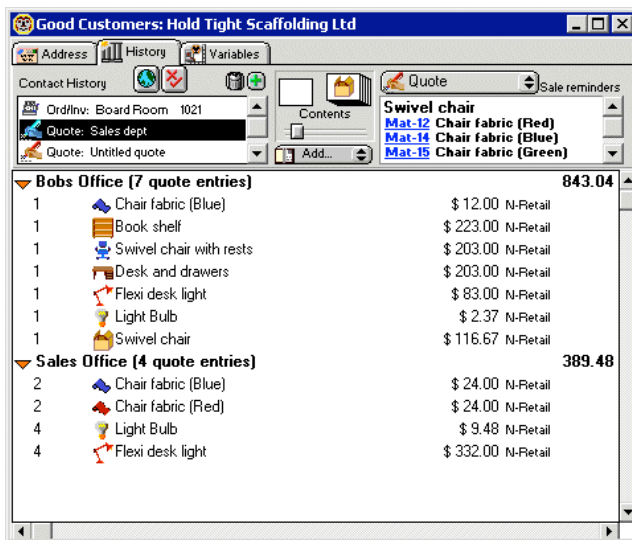
Quote contents view
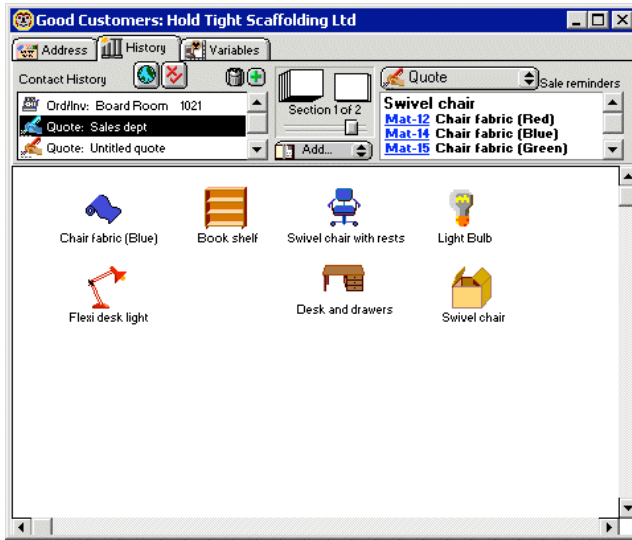
Quote section/graphic view

The name of each section can be changed in the section name field under the page switcher in the top of the window or by clicking on the section name in the "Contents" view.

Costs mode

About

The costs mode of a Quote incorporates both costs and finance options.
Costs can be quoted to provide a more accurate description of the customers purchase.

Costs mode

Goods total

The Goods Total, the full total of the goods quoted.

Quote discount

If you choose to have a discount value for the whole Quote, it will appear here.

Pre tax costs

Costs which incur sales tax can be added to a Quote.

Sales Tax

The calculated sales tax on the goods and costs.

Non-taxable costs

Costs which do not incur sales tax

Total

The total value of the Quote

Finance

Both rental and purchase finance can be added to a Quote

Total financed

The goods value to be financed. The goods total less quote discount, if any.

Deposit

The deposit a customer will pay on the goods, only applies to purchase finance.

Term (months)

The term over which the customer wishes to finance the goods.

Finance rate

The rate which applies to the term the customer has chosen. Finance rates are stored in the preferences (See section "Finance", chapter 24. "Preferences").
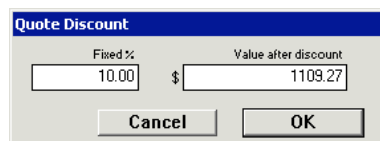
Monthly payments

The payment the customer will make on a monthly basis for the financed goods.

Whole Discount

As well as a discount per item in the Quote or Invoice, a whole discount can be provided. The action of setting the discount is hidden so that the Customer is not prompted to ask for one.
To set the whole discount, select "Quote discount" in the "Quote" menu or double click anywhere in the costs mode area while holding down the "Alt" (Mac)/"Ctrl" (PC) key down. A dialogue will appear and the value can then be set.

Setting discount on the whole Quote

To remove a discount from a Quote, repeat the procedure and set the discount value to zero. The discount will be removed from the calculations display.

Editing Costs
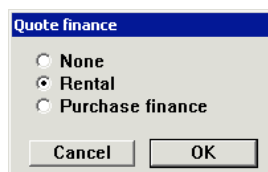
To add a cost, either Pre-Tax or Non-taxable, click on the button "Pre tax costs"/"Non-taxable costs" and a default nil cost will be created.
Click on the new cost or title, once to select and then a second time to edit it. When you have finished editing the cost, type return, tab or click elsewhere to set its value.
A cost can be removed by selecting the cost cell and selecting "Clear cost" in the "Edit" menu or pressing the delete key.

Finance

The type of finance to be used for a Quote can be chosen by selecting "Set Quote finance" in the "Quote" menu. This will open the finance dialogue.

Choose finance dialogue

Choose the finance you would like to use, or "None" to remove the finance fields.
Both rental and purchase finance use the same fields, the only difference being "Deposit". This is only used for Purchase finance.

The editable fields for finance are the Deposit and Term fields. Double click in these fields to edit them.
Only a valid finance term can be entered into the "Term" field. The value you enter will be checked with the stored list of finance terms in the preferences. If there is no exact match, a default term will be used (See section "Finance", chapter "Preferences").
The monthly payments field is automatically updated when you make a change to a finance field.

Profit mode

About

The profit mode of a Quote or Invoice provides a breakdown of the profitability of the Quote or Invoice.
Each Quote entry is listed with its associated margin value.

Profit mode								
Goods total	1232.52							
Discount	123.25	10.00 % of Goods total						
Total sale	1109.27							
Goods cost	851.84							
Margin	**257.43**	**23.21 % of Total sale**						
Commission	25.74	10.00 % of margin						

Quantity	Name	Margin %	Margin	Discount	Discount %	Cost price	Quoted price	Sales Tax	List price
	Bobs Office								
1	Chair fabric (Blue)	45.42 %	5.45	0.00	0.00 %	$ 6.55	$ 12.00	1.20	$ 12.00
1	Book shelf	18.77 %	41.85	0.00	0.00 %	$ 181.15	$ 223.00	22.30	$ 223.00
1	Swivel chair with rests	15.12 %	30.70	0.00	0.00 %	$ 172.30	$ 203.00	20.30	$ 203.00
1	Desk and drawers	15.27 %	31.00	0.00	0.00 %	$ 172.00	$ 203.00	20.30	$ 203.00
1	Flexi desk light	48.77 %	40.48	0.00	0.00 %	$ 42.52	$ 83.00	8.30	$ 83.00
1	Light Bulb	62.03 %	1.47	0.00	0.00 %	$ 0.90	$ 2.37	0.24	$ 2.37
1	Swivel chair	34.00 %	39.67	0.00	0.00 %	$ 77.00	$ 116.67	11.67	$ 116.67
	Sales Office								
2	Chair fabric (Blue)	45.42 %	10.90	0.00	0.00 %	$ 13.10	$ 24.00	2.40	$ 24.00
2	Chair fabric (Red)	47.33 %	11.36	0.00	0.00 %	$ 12.64	$ 24.00	2.40	$ 24.00
4	Light Bulb	62.03 %	5.88	0.00	0.00 %	$ 3.60	$ 9.48	0.95	$ 9.48
4	Flexi desk light	48.77 %	161.92	0.00	0.00 %	$ 170.08	$ 332.00	33.20	$ 332.00

Quote Profit mode

Goods total

The total value of the goods included in this total.

Quote discount

Edited by double clicking on the Quote discount line with the "Alt" (Mac)/"Ctrl" (PC) key held down (See section "Costs mode" in this chapter).

Total sale

Total gross sale value of the goods.

Goods cost

The combined cost values of the goods in the Quote.

Margin

The margin value and percentage for the Quote.

Commission

If you have defined your commission percentage in the preferences, the sales commission value for the Quote will be shown here.

Quote entries

Each Quote entry will be listed with their own profit details. The quoted price is the value that you have recorded for the quote entry's sell price in this Quote. The list price is the current source Product or Bundle sell price, used for comparison.

Double click on a line to edit these entries in the same way as the "Goods mode". Discounts, quoted price and other information can be changed for each Quote entry in the "Profit mode" to recalculate the whole Quote margin value.

Quote entry object

About

When installed into a Quote, a Product or Bundle is converted into a Quote entry. In the Page (graphical) view of the Quote, it has the following graphical appearance:

10.00 % <File closed>
Swivel chair with rests

Quote entry (Graphical view)

Each of the symbols shown indicates a property of the Quote entry. The Contents (line) view abbreviates these properties. The same Quote entry appears as the following in the Contents:

1 Swivel chair with res. 10.00 % $ 182.70 N-Retail
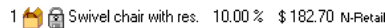
Quote entry (Contents view)

The quantity, name and discount can be changed directly here by clicking on each part and typing a new value.

Name

The name of the Quote entry.

Quantity

The number of items. This is not visible if there is only one.

Discount

The discount (in percent) associated with an object. Visible if a discount has been applied and the "Show discount" option has been checked (See section "Quote entry object" later in this chapter).

Sales tax

The Sales tax code for each Quote entry is shown (for countries that have more than one Sales tax).
Price type

The quote entry's price type is shown if you have more than one price type and have set the preferences to do show the type.

Has description

This indicator is present when the Quote entry will print a description. This description can be taken from a Product specification and provides a customer with more Product detail.

Source Icon

When the Quote entry's source document is open, the icon related to the source Product or Bundle will appear for this Quote entry. If this document is closed a default icon will appear, as in the figure above.

Price differs from source

A warning indicator which shows that the price stored for this Quote entry differs from its source Product or Bundle.

Source file status

The current state of this Quote entry's source document, Price List or Catalogue. If visible, it will show that the source document is not open, that it has been moved or simply can not be found.

Source file name

The name of the source document for this entry. This is optional and set in the preferences (See section "Contact ", chapter "Preferences").

Creating

From the "Add" popup

Products can be added to a quote by clicking on the "add" popup under the page switcher in the upper middle of the window.

From a Price List

Products can be selected and dragged from a Price List window into a Quote. Copying objects is done in a similar way, by selecting the product(s) and copying and pasting into the Quote.

From a Catalogue or Quote

Products and bundles can be selected and copied or dragged from a Catalogue window, into a Quote. This is possible from both the contents and section (graphic) Catalogue views.
If you hold down the "Alt" (Mac)/"Ctrl" (PC) key when you install a product in a quote, you will be shown the quote entry dialogue so you can adjust the quantity.
Each item remembers the file that it came from, by file name and disk location. The item's file can be changed by selecting the "Set source document" menu item, and then selecting the new file.

Note: Products (but not bundle objects) in Catalogues originate from Price Lists. This means that a Product copied from a Catalogue to a Quote will remember the Price List's file, not the Catalogue's.

Deleting

Quote entries can be deleted by selecting them, and then selecting "Clear Quote entry"/"Cut Quote entry" in the "Edit" menu or pressing the "Delete" key.

Quote entry information
dialogue

Information about a Quote entry can be changed by selecting it and selecting "Edit quote entry" in the "Edit" menu, or by double clicking on it. This will show an information dialogue for that entry.

Quote entry info dialogue

Quantity

The entry's quantity value can be changed in this field. It can be a decimal value if required, but must be a positive number.

Name

The object's name can be changed. The default is the name of the source Product or Bundle, when it was

installed into the Quote. Changing the name only affects this object in this Quote.

Price type

If you have more than one price type then this popup will appear and allow you to choose a price type for the quote entry e.g. wholesale or retail.

Unit Price

This is the current price for the quote entry, after discount (if any).

Total Price

The unit price multiplied by the quantity.

Sales Tax codes

The Sales tax code will be shown if you have multiple Sales taxes or if the Quote entry is exempt from tax. This Sales tax can be edited by clicking on the button "Change" which will show an editing dialogue.

Show Specifications

A description of an object can be shown in the printed Quote. This may be information or notes about the Product, to assist the customer.
This description defaults to the specifications of the Product, but can then be edited (See chapter 7. "Product", chapter 9. "Bundle").

Price List/Catalogue

The source file for this quote entry is shown here.

Open source info

Clicking on this button will open the source Product/Bundle information window.

Generous

The discount value for a Quoted price can be set in the Quote entry info dialogue.
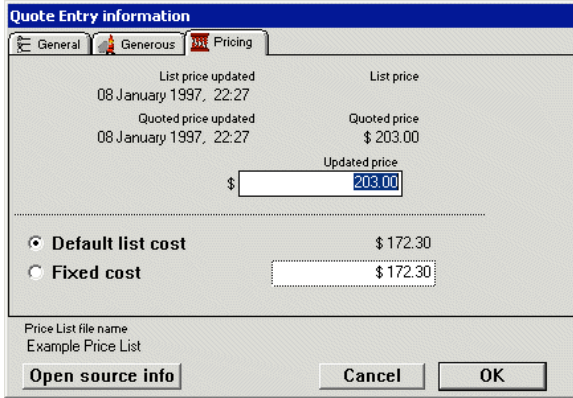
Quote entry discount

Discount can be set in two ways.

> 1) Set a discount percentage ("Fixed %"). All later updates of the quoted price will then be discounted by this percentage value.

> 2) Set a discount value ("Fixed value"). This is fixed value and will not change if the quoted price is updated. The percentage value will however change with updates.
> Discount may be set as a negative value. This is useful for weighting prices. It may be advisable to then uncheck the "Display discount" button. This will hide the discount in the Quote and printed result. The unit and calculated prices shown for the discounted Quote entry will however be the discounted value.

Pricing

A quote entry's quoted price and cost can also be changed in the Quote entry dialogue.

Update price and cost

Quoted price
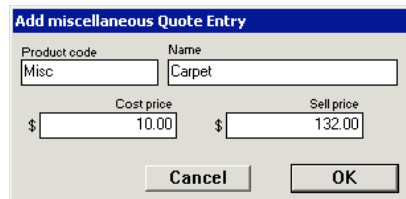
The quoted price and the current list price (if available from an open source document) are shown. This price update only affects this entry in this quote and does not affect its price list.
The update times are also shown for the source object and, the quoted price. This time is set when the object is updated, as an indication only.

Cost

The cost of a Quote entry is normally stored in its source object in a source document (Price List or Catalogue).
If you wish to change the cost of a Quote entry (perhaps a supplier has given you a special buy price for this quote) you can type a new value in the cost field.

Adding miscellaneous Quote entries

In some cases you may not have all products you sell stored in a Price List. This could be true for items such as small accessories and products that you sell very rarely.
If you wish to add one of these Products to a Quote and do not wish to store the Product in a Price List, you can select the "Add miscellaneous" menu item in the "Quote" menu. When this menu item is selected a dialogue for the new Quote entry's details will appear.

Add miscellaneous Quote Entry Dialogue

A miscellaneous Quote entry behaves in much the same way as a normal Quote entry but has its own icon.

Copying a Picture

As mentioned earlier, quote entries can be copied from a Quote. When an entry is copied in the Page or Graphic mode, a picture of the object is also copied (as in a Catalogue). This picture can then be pasted into another application to be used in drawing documents.

Printing

Printing of a Quote is done by first selecting a Print Template and then double clicking on the Quote in the History list, or selecting "Print..." in the "File" menu (See chapter "Print Template").

Exporting

A Quote can be exported to a file for use in other applications. This could be used for a picking list or shipping document. Select "Export Quote" in the "File" menu (See chapter "Exporting Data").

Invoice-Order

General

About

Invoices and Orders are treated as the same object in SaleSmartz, they are fixed records of goods purchased by a customer.
Generally Quotes are used to edit orders for customers. When you have finished a Quote, it can then be converted to an Invoice which is a fixed Order.
The information stored in an Invoice is fixed as the Invoice represents an agreement with the customer, however, the installation notes and delivered quantities can be changed. Notes can display your own information for each of the products in an Invoice. For example they could contain serial numbers or warranty details.

Creating

Invoices are created in the "Contact" window by converting Quotes into Invoices (See section "History", chapter "Contact").

Parts

An invoice contains several parts. The page switcher in the top right of the Contact file window allows you to view each of these parts.
Each part of an invoice is described in the following sections.

Invoice editing panel

About

Invoices are viewed in the history mode of the Contact file window. When an invoice is first selected, the first page of the invoice will be shown.
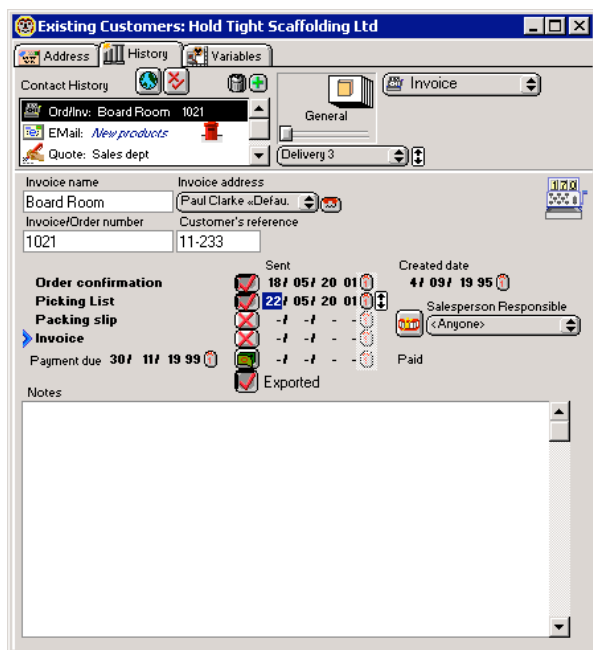
Invoice editing panel

Name

The Invoice will retain the name of the original Quote until changed in the name field below the history field.

Address

The address popup menu acts in the same way as the Quote address type popup. The address chosen will be shown in the printed Invoice.

Invoice icon

The Invoice icon acts as a dragging tool. Drag this icon to move information about the Invoice to other windows.

Invoice/Order number

The Invoice can have an invoice number to act as an internal reference for your company. This can be changed in this field, but can also be created automatically if you wish, when you create the invoice.
If you enable the option for automatic invoice numbering in the preferences, a

new incremental invoice number will be placed in this field ([See section "Contact", chapter "Preferences"](#)).

Customer's reference

The Invoice has a customer reference which is set at the time the Quote is converted to the Invoice. It can be changed in the number field below the list. This can be used to store a customers order number, or other reference, but is not required.

Created date

This date represents the time at which the Order/Invoice was converted from a Quote.

Salesperson responsible

This field allows you to allocate or record the invoice for another person in your company.

Order confirmation/Picking List...

If you have chosen the whole order process option in the preferences, then you will be shown all of the parts of the process shown in the example above. Clicking on each of these parts will select the appropriate template (stored in the preferences). When completed, the button to the right of each part can be clicked on to indicate when its document was printed/sent.

Payment due

The reminder date is set to remind you to check up on an Invoice, to make sure it has been paid. The payment due date for an invoice can be set in this field. This can be automatically defined with a set number of days, if you define the contact property to do so ([See chapter "Custom Variables"](#)).
The payment due date is the date used on the automatic To Do Memo which gets created for an invoice, until the invoice is marked as paid.

Paid

A button is provided to indicate whether or not a Contact has paid the Invoice. The date field to the right of this button shows the payment date, once the payment has been made.

Notes

Additional information such as terms of payment and partial payments can be stored in the Notes field.

Goods mode

About

Goods mode					Unit Price	Calculated Price	Installation notes
Order	Deliv.	Left					
Untitled section							
1	1	0	Light Bulb		2.37	2.37	
2	2	0	Book shelf		223.00	446.00	
1	1	0	Chair fabric (Green)		12.50	12.50	
1	1	0	Chair fabric (Blue)		12.00	12.00	
20	5	15	Swivel chair with rests	5.00	203.00	964.25	s/n 33221
14	14	0	Flexi desk light		83.00	1162.00	
					Goods total	**2599.12**	

Invoice goods mode

The goods mode is a list of all the goods purchased by the customer. The list of goods in an Invoice is fixed. Quantities, prices and costs of Products are set when the Invoice is converted from a Quote.

Partial deliveries

An invoice can be broken into several delivery stages. The actual delivered amount can be edited by clicking on each product's quantity.
When you change the quantity, the invoice will be changed into a partial delivery. This will add two new quantity columns and a delivery popup under the page switcher.
When you have changed all quantities for the current part delivery, you can click on the "Done" button under the page switcher. This will complete the current part delivery and create a new one.
New partial deliveries will be created each time you click on the "Done" button until there is no more stock left to deliver.
You can view and print previous partial deliveries by choosing each part in the popup menu below the page switcher.
Only the quantities in the last partial delivery can be edited, if you wish to change previous deliveries, you will have to use the popup menu to delete the last delivery. This will return the last delivery's stock to the previous delivery.

Supply

About

The supply part of an invoice can be used to help you order in products for the Customer's order. You can group products with suppliers to send orders to them or to act as a picking list for your own use.
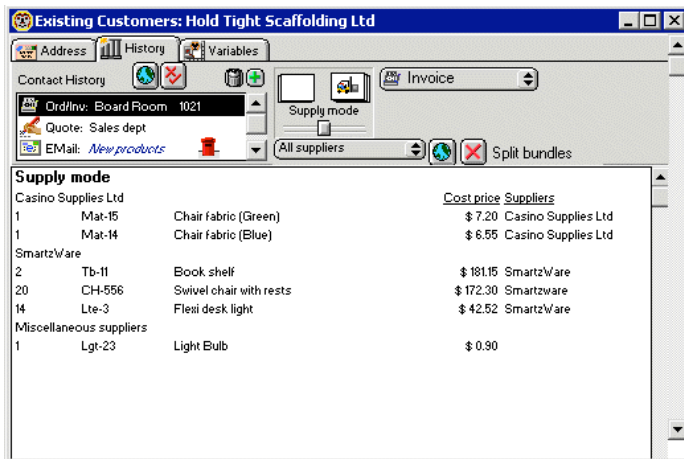
Invoice "Supply" mode

Products can be grouped under supplier names by dragging each product to the supplier. Suppliers are added when the Invoice is created, and collected from the suppliers for each product. Use the "Edit" menu if you wish to later add suppliers to or remove suppliers from the Invoice.

Once products have been grouped, you can print out orders for each supplier by first selecting the supplier's name in the pop up menu at the top of the window. You can then use the "Print" or "Print preview" menu items in the "File" menu to print out the selected products. The appearance of the print out is defined by the chosen print template.

Costs, Finance and Profit

An Invoice has Costs and Profit modes like a Quote but these can not be changed.
The costs mode contains calculations for the final total and finance.
The profit mode contains a breakdown of the Invoice's profit.

For more information about these modes, see sections "Costs mode" and "Profit mode", chapter "Quote".

Printing

Printing of an Invoice is done by first selecting a Print Template and then selecting "Print..." in the "File" menu (See chapter "Print Template").

Exporting

An Invoice can be exported to a file for use in other applications. Select "Export Invoice" in the "File" menu (See chapter "Exporting Data").

EMail

General

About

SaleSmartz provides eMail integration so that you can send and receive eMails, and keep track of customer eMails. EMails can be automatically linked to contacts so that you can see your communication with a contact, at a glance, in the contact history. SaleSmartz uses its own eMail plugins, or external eMail applications to send and receive mail.

You can also use templates to send eMails to one or more contacts. Quotes and

invoices can also be emailed to contacts using SZ Templates. (For more information on these, See chapter "SZ Template")

Hints

EMail templates

You can save an eMail as a template by selecting the "File" menu - "Save as" option. Save it into your "Merge templates" folder to use it as a merge template for contact merges.
You can also add default cc/bcc email addresses and even attachment files or embedded images.

EMail quote/invoice templates

Create a new SZ template and edit the template text. Then copy the template text and paste into an eMail. Save the eMail as a file in your "Templates" folder and it will appear in your quote/invoices template menu.

Private eMail accounts

You can set up personal eMail accounts in the Preferences - eMail accounts, and mark the option "Private account". All incoming and sent eMails for this account will appear in the "Private" folder which no other user can see. (See Section "EMail accounts", chapter "Preferences")

Auto address completion

Type a few letters of someones name or eMail address, click out of the address field and SaleSmartz will search for a matching address. It will insert the found address, or ask you to choose from a list of matching addresses when you click the send button

Out of office reply

Create an out of office eMail template, then you can set up an eMail rule to reply to all eMails with the template when you are on vacation. (See Section "EMail rules", chapter "Preferences")

EMail

Creating

New eMail is created by selecting "New" from the "File" menu, clicking on the new eMail button in the Tool Bar or a Contact Info window, or by mail merging with an eMail template

New eMail window

Basic new EMail window

The eMail window allows you to create and edit eMails and then send them to your contacts.

Send

This button will send (or queue) eMails after you have completed them. You can save your eMails at any time and they will appear in the "Drafts" folder in the Mail Centre, until they are sent. If you have chosen the preference not to send

immediately, this button will have the text "Queue" on it (See section "EMail", chapter "Preferences"). Clicking on "Queue" will save the eMail in the Mail Centre Outbox until the "Send & Receive" action is processed.

Attach files

With this button, you can attach one or more files to an eMail, so that they are sent with the mail. The list of attached files will appear in the bottom of the eMail window.

Subject

This field is used to enter the subject of the eMail

To/Cc/Bcc

These buttons/fields can be used to enter the address of the recipients. The arrow icons to the right of these buttons allow you to choose an address from your shortlist. This shortlist can be the most commonly used eMail addresses and is changed by clicking on the button [icon] to the right of the eMail field in a contact window.

<div align="center">**EMail destination address field**</div>

When you edit an address, the address editor window will appear over the eMail window. Several addresses can be added to an eMail, by clicking on the "Add more addresses" link, or by pasting from the clipboard.

Note: You can type names of contacts or partial addresses and SaleSmartz will find matches and automatically fill in the address.

From

The "From" popup menu allows you to choose the "From" address for your eMail. The list of these addresses is stored in the preferences (See Section "EMail accounts", chapter "Preferences")

Message

The large field in the bottom of the eMail window is used to enter the text of the message. You can have a default signature appear here by default by setting the eMail accounts in the preferences (See Section "EMail accounts", chapter "Preferences")
Use the Font and Style menus at the top of your screen to format the text message.

Spell checker

You can use the built in spell checker for your emails. Windows users may need to install some extra software. Click here for more info.
Spell checking is automatic and any text that may be a spelling error will be hilighted in red. Right click on any text that is in error and you will be shown a menu of options to correct the text.

<div align="center">**Spell checker menu**</div>

Incoming eMail
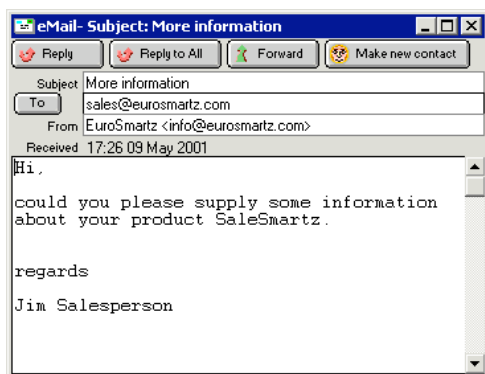
Received eMail window

When you receive an eMail, it will have additional buttons in the eMail window.

Reply

This button will copy the text of the message and create a new eMail to the sender. Each line of the copied message can have a prefix (e.g. >) so that you can see the original text. This prefix is set in the preferences (See section "EMail", chapter "Preferences")

If you have set several eMail accounts in the preferences, the reply message will automatically have your "From" address set to the matching eMail account, and also any signtaure will be attached below the message.

Reply to all

this button functions in a similar way to the "Reply" button, but includes the addresses of all recipients in the new eMail.

Forward

This button will create a new eMail with the contents of the received mail, to allow you te send it to another recipient.

Make new contact

If the received eMail is not linked to a contact (i.e. the sender's address is not stored for any contact in your contact list), you can make a new contact from this eMail, by clicking on the "Make new contact" button. The address and any other name information stored in the eMail will be used to create the new contact.

Once you save the new contact, all eMails relating to this contact will be attached to the contact if you have the preference set to do so (See section "EMail", chapter "Preferences")

EMail menu

The eMail menu will appear in the top of your screen when you have an eMail selected or an email window open.
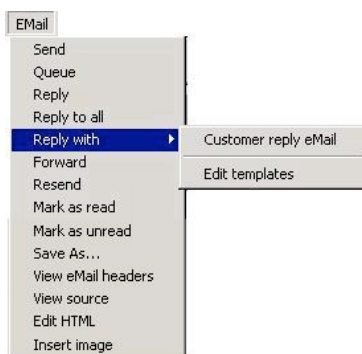
EMail Menu

Send

Send or queue this eMail, depending on your preference settings (See section "EMail", chapter "Preferences")

Queue

Queue this eMail in the Outbox for the next "Send & receive"

Reply

Create a new email in reply to this eMail

Reply to All

Create a new email in reply to this eMail, but to all addresses listed in the eMail

Reply with <template>

Create a new email in reply to this eMail using the selected template. See section "EMail templates", chapter "EMail"

Forward

Forward the email and any attachments to one or more eMail recipients.

Resend

Forward the email and any attachments in its original format, to one or more eMail recipients. This can be useful if you want to forward emails with HTML content to somone.

Mark as read

Change the "read" status of this email for you, to "Read" without opening it. This won't affect the read status for other users.

Mark as unread

Change the "read" status of this email for you, to "Unread". This won't affect the read status for other users.

Save as..

Saves the current eMail as a file. This is useful for converting incoming eMails into templates.

View eMail headers

Show the hidden transmission information for an eMail.

View source

Show the content of the eMail message. This is really only useful for HTML messages.

Edit HTML

If you choose to resend an HTML formatted email, this menu item will allow you to edit the raw HTML before sending it.

Insert image

This will allow you to select an image file and then attach it to the eMail and insert an image tag placeholder in the email text.
This placeholder text will then be replaced with the image when the eMail is sent with the SaleSmartz eMail Plugin.

EMail templates

About

EMail templates can be used as standard replies to emails, or even to email quotes and invoices.
Correspondence eMail templates are stored in the "Merge templates" folder and can be edited using the "File" menu - "Merge with" - "Edit merge templates".
Quote and invoice eMail templates are stored in the "Templates" folder inside your SaleSmartz folder.
New eMail templates can be saved by using the "File" menu - "Save as" menu item when you have an email open.

To create more advanced eMail templates, paste the text from an "SZ Template" (Chapter "SZ Template") This will allow you to merge contact and quote/invoice fields with your template.

Mail Centre

About

The Mail Centre stores and organises all eMails. It has several folders which store different types of eMail.

Opening

The Mail Centre window can be opened by choose "Show Mail Centre" from the "Windows" menu. You can also set a preference to open it when starting SaleSmartz (See section "General", chapter "Preferences")
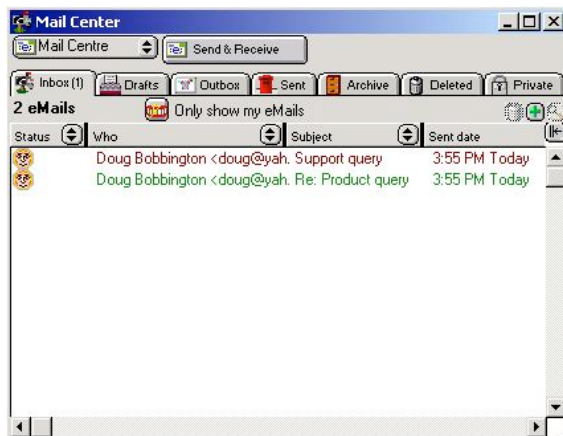
Mail Centre Window

Mail Centre menu

This button shows the menu for the Mail Centre. Details below

Send & Receive

This button will synchronise the Mail Centre with your eMail application. Queued mails in the Outbox will be sent and new mail will be added to the Mail Centre Inbox.

Inbox...Deleted

These folders store different types of eMails. You can move eMails between folders by selecting and then dragging eMails onto the name of the folder.
The number of unread emails for each folder is displayed in the folder name tab, inside brackets.
Additional eMail folders can be added in the preferences (See section "EMail", chapter "Preferences")

Private

This folder stores your own private eMails so that no others on the network can see or access them.

Reply etc.

Other buttons will appear once you have selected one or more eMails. These are the same buttons that appear in the eMail window and have the same function (See section "EMail")

Only show my eMails

This button will filter eMails so that you will see only those that were sent to or from you, or that don't match any of the user's personal eMail addresses if you have a network system. You will need to make sure you have set your personal eMail address in the preferences for this (See section "Myself", chapter "Preferences").

Mail Centre Menu

Send & Receive

You can manually synchronize eMail accounts using this menuitem. EMail accounts are synchronized in the background.

Move to

Use this menuitem to move selected eMails to other folders.

EMail accounts

Edit all eMail accounts in the preferences.

EMail rules

Edit all eMail rules in the preferences.

Filter again

This will filter all eMails in all folders and check to link them to contacts with matching eMail addresses.

Run manual rules

Run any rules marked with the option "Manual".

Show eMail processes

Show any background eMail account plugin processes.

EMail

Displays the eMail menu (see above) for selected eMails.

Attachments

Any attachments for incoming eMails will be stored in a folder called "EMail attachments" on your server, or in your SaleSmartz folder. These attachments can be set to be removed if you delete the associated eMail, by setting a preference (See section "EMail" chapter "Preferences").
Private eMail attachments are stored locally on your own computer.

EMail Rules

About

EMail rules are powerful filters which can be used to perform actions on eMails. For example, you can move all eMails with a particular subject to a special folder.
You could also create a rule to reply to all emails sent to a support email address. This reply could send and eMail template displaying the status of a support contract by comparing a contact's custom variable with the current date. (See section "EMail rules" chapter "Preferences")

PriceList

General

About

Price Lists are the reference documents for all Products. The structure of a Price List allows sharing a single file between many users, such as in a team network situation. Updates made by a user will be shown in the Price List on the other users computers (See chapter "Multi Users").
Links are formed from Price Lists to Catalogues and Quotes in order to obtain Product information. Product information such as code, name and price are stored in Price Lists. All references by other documents to Products in a Price List are by product code only.
Product Groups are also stored in a Price List. Icons can be attached to both Products and Product Groups. Icons can also be edited within the Price List (See section "Product Icons").

Window
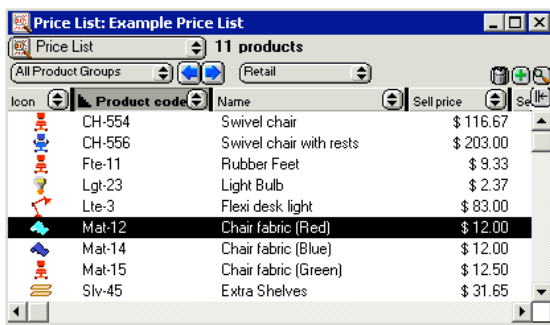
Price List window

The price type popup menu (which appears in the middle of the window under the title) allows you to show different price types e.g. Retail and Wholesale. This popup menu is only visible if there is more than one price type (See section "Price List", chapter "Preferences").

Creating

Select "New..." in the "File" menu and then choose the "Price List" document type in the "New document" dialogue.

Deleting

A Price List file can be deleted by removing its file from disk.

Opening

A Price List can be opened by opening the file on disk or from the "Show a Catalogue/Price List" menu in the "Windows" menu. It can also be opened from a Quote or Catalogue by selecting the menu item "Open reference documents" or when an object requests Price List information (such as double clicking on an object in a Catalogue).

Menu

The Price List has a main list window for viewing all Products, Icons and Product Groups. It has its own menu called "Price List". When the Price List window is active, this menu will appear and contains these items.
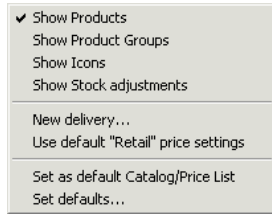
Price List menu

Show Products

Shows the view containing the list of Products.

Show Product Groups

This shows the Product Group view of the Price List window to show all installed groups and allow editing of them (See section "Product Groups").

Show Icons

This shows the Icon view of the Price List window to allow icon editing (See section "Product Icons").

Show Stock adjustments

The stock adjustments view of a price list can be show by selecting this menu item.

New delivery...

If you wish to use the stock level features of SaleSmartz, this menu item allows you to enter a new delivery into the price list to change the stock levels for the selected products.

Use default "Retail" price settings

This menu item changes the selected product(s) to the default price and sales tax settings. These settings are taken from the selected Product's Product group or the Price List. This action only affects the currently shown price type (if you have more than one).

Set as default Catalogue/Price List

This will make this Price List the default, so it will be opened, optionally at startup, or from the Windows menu.

Set defaults...

You can set the Price List's defaults with this menu item.

Set defaults
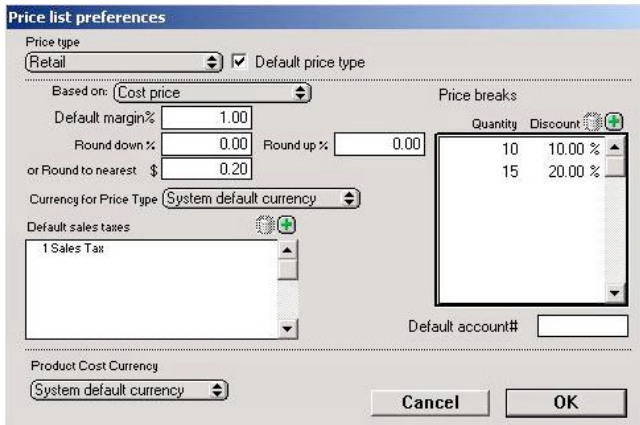
Setting the defaults for a Price List.

Price type

A popup menu at the top of the defaults window can be used to edit the defaults for each price type in the Price List, if there is more than one price type.

Default price type

The most commonly used price type can be marked with this check box. This price type will be shown when the price list is first opened.
Note: The price type popup and checkbox will not be visible if you have only one price type (See section "Price List", chapter "Preferences").

Based on

Here you can select if this price type is based on cost price, or another price type. Then the margin will set your sell price.

Default margin

The margin will be used for Products which use a default Price List margin ([See section "Pricing", chapter "Product"](#)).

Round up/down

Rounding of prices can be determined in the two rounding fields. Products that use a margin to calculate their retail price will be affected by these fields. Rounding can be used to prevent retail values containing decimal or odd values.

Or to nearest

You can specify the minimum price rounding here. eg. round to the nearest $

Currency for price type

The currency for this price type can be set here. This will convert all prices in the price type using the exchange rates set in the Preferences ([See section "Price List", chapter "Preferences"](#)).

Default sales taxes

Sales tax can also be defined in this window. The sales tax field in the right of the dialogue is used to display all sales tax values used in this price list. The field in the bottom of the window is used to define which tax(es) will be the default for the selected price type. Taxes can be added by first selecting the Tax field and then choosing "New Sales tax" in the "Edit" menu for Macintosh, or for Windows, by choosing "New Sales tax" in the menu provided by clicking the right mouse button. Clicking on each line will allow you to choose a tax from the applications list of taxes stored in the "Shared Resources" file ([See section "Price List" in chapter "Preferences"](#)).

Price breaks

You can specify price breaks that apply to the whole price list here. You can also set price breaks per product group and per product.

Default account

The account code is only used when exporting products to an accounting system.

Product Cost Currency

This poup menu defines the currency that is used when you purhcase your products. By default it is your own currecny, specified by "System default currency"

Product Icons

About

Picture icons can be added to a Price List to enhance the appearance and descriptions of Products. These icons are stored in the Price List file and linked to Products and Product groups.
Both large and small icons are used in SaleSmartz. Be sure to edit both the large and small versions of an icon, as they are used in different views. Small icons are usually used in lists, while large icons are used in Catalogues, Quotes and Price Information Windows.

Creating

Icons can be added by using the "Icons" view of the Price List window. Select the menu item "Edit icons..." in a Price List menu when viewing any of the Price List windows. The "Icons" view will appear with a list of all of the Icons in the current Price List.
To add a new icon, select the menu item "New icon" in the "Edit" menu and the Edit Icon dialogue will appear with a new default icon. Edit the new icon as described later (See Editing section). To add the new icon to the list, click on the "Save" button. It will then be saved and included in the list.
Icons can be pasted into a Product Information window or the into the Price List window from the clipboard ([See section "Product Info window", chapter "Product"](#)).

Disk file icons (Macintosh version only)
If you wish to copy an icon from a disk file for example, switch into the "Finder", select the file, and show the information window for that file by selecting "Get info..." in the "File" menu. Click on the file's icon at the top left of this window and copy it. Switch back into the SaleSmartz application and paste the icon into the Price List window.

Pictures

Pictures can be pasted as icons. If you have a graphics viewing application, select a picture and copy it. Switch into the SaleSmartz application and paste the picture into the price list window. A new Icon should be created using the picture.
Icons can also be dragged from another Price List's window.

Deleting

Icons can be deleted by selecting an icon in the Icon's view and selecting "Clear icon", "Cut icon" in the "Edit" menu or pressing the "Delete" key.

Editing

Icons can be edited within the Price List. Double click on an Icon in the List window, or select it and choose the menu item "Edit icon". You will be presented with this editing dialogue.
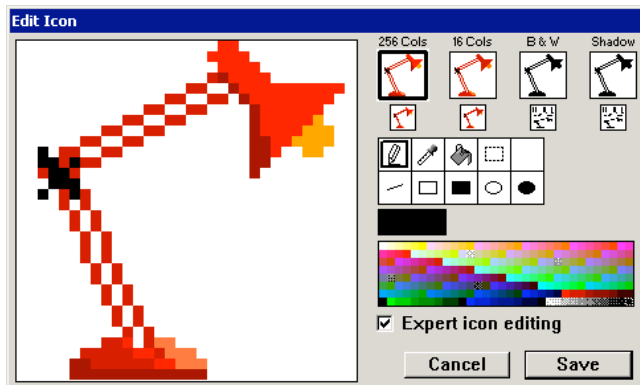
Icon editing dialogue

Both large (Product information window) and small (Products in the Price List window) icon views can also be edited.
256 Cols, 16 Cols, B & W.

An Icon consists of four different view modes, the three colour depths and shadow. The mode(s) you choose to edit will depend on your computer's screen colour capabilities, i.e. if you only work with a black and white screen then you will only need to edit the "B & W" icon view.

Shadow

The shadow mode is used to provide the background for the icon, it acts as the screen. If you draw an icon and notice that not all the parts of the icon are visible, then you will probably have to change the shadow mode icon.
A simple way to edit the shadow mode is to drag an icon from another mode on to it for conversion.

Expert icon editing

If you have this option selected then you will be able to edit all possible view modes, as seen in the figure shown above. Normally you would have this option disabled and only edit the icons mode which matches your screen.

Making changes

1) To select an icon view, click on the sample icons at the top right of the window. Both large and small versions are available. Small versions will be used in line views, such as the Price List and Catalogue/Quote contents. Large Icons are used in Graphic views, such as the Catalogue and Product Information window. When selected, the chosen view will appear in the large editing field on the left.

2) Choose the tool you wish to use to draw from the tool palette.

3) Choose a colour from the palette on the bottom right of the window.

4) Use the cursor as a pencil to fill in dots of the Icon with the chosen colour. Straight lines can be drawn by first holding the shift-key down and then clicking in the sample. The first direction you move the cursor in will be the direction of the line you draw.

5) Borrowing a colour from a part of the sample icon can be done by holding the "Alt" (Mac)/"Ctrl" (PC) key down or choosing the eye dropper tool. The cursor will change to an eye-dropper symbol . The tip of the eye-dropper picks up colours when clicked on a dot in the sample. The selected colour will then appear in the colour palette.

6) Icons can be dragged to other icons in the top right of the window to convert them to different modes and sizes, e.g. the large 256 colour icon can be dragged onto the small 256 colour icon to convert the image to a small size without having to redraw it.

7) When editing is completed, click on the "Save" button at the bottom of the dialogue to store the changes into the Price List file.

Product Groups

About

Product Groups provide a means of collecting Products into groups. A Group has a name and optionally an icon. The group's icon will be used by Products in the group if a Product has no icon of its own. "<None>" will be shown as the default group name for Products. Even "<None>" can have an icon attached.
A Product Group can also have a sell price margin assigned to it. This margin

will be used if a Product in this group uses the "Default margin" mode (See section "Pricing", chapter "Product").

Product Groups.

Creating

Groups are created when Products are imported from a file and the "Product Group" column has been checked "on" (see chapter 17. "Importing Data"). They can also be added by using the "Product Groups" view of the "Price List" window. Select "Show Product Groups" in a price list menu when viewing any of the Price List windows. The "Product Groups" view will appear with a list of all of the Product Groups in the current Price List.

To add a new Product Group, select "New Product Group" in the "Edit" menu and the Edit Product Group dialogue will appear with a new default group. Edit the new group as described later (See section "Editing" below). To add this new group to the list, click on the "Save" button. It will then be saved and included in the list.

Deleting

Product Groups can be deleted by selecting a group in the "Product Groups" view of the "Price List" window and selecting the menu item "Clear Product Group" or pressing the "Delete" key. The default group "<None>" is protected and can not be deleted.

Editing

Product Groups can be changed if desired. Double click on a group in the Product Groups view or select and select "Edit Product Group" in the "Edit" menu. You will be presented with this dialogue.

Edit Product Group dialogue

Icon

An Icon can be linked to a Product group by pasting from the clipboard or selecting from the Icon list, in the same way as in the Product Information window.
Select the icon in the "Edit Product Group" window, and paste a new icon. Double click on the icon to choose from the list of icons in the Price List.

Group name

The name of the group can be edited in the "Group name " field.
Note: The "<None>" group name cannot be changed.

Price type

This popup menu allows you to define the following defaults for each of the price types.
Note: The Price type popup menu will not be visible if you only have one price type (See section "Price List" in chapter "Preferences").

Group Margin

If you wish, a group's sell price margin can be set in this field. Click the button "Group margin" and then type a value into the field. This value will be used for Products in this group using the "Default margin" mode (See section "Pricing", chapter "Product").

Group account #

A default account code can be set for products groups. This account code will be used when exporting products to an accounting application. This account code will only apply to products without their own account code.

Sales tax

If you wish to assign a sales tax to all products in this product group, use this field.
Taxes can be added by first selecting the Tax field and then choosing "New Sales tax" in the "Edit" menu for Macintosh, or for Windows, by choosing "New Sales tax" in the menu provided by clicking the right mouse button. Only sales taxes listed in the Preferences can be used ([See section "Price List",chapter "Preferences"](#)).

Stock adjustments

About

Product stock adjustments is an optional feature of Price Lists that can be used to keep control of stock levels.
The Stock adjustments view can be shown by selecting "Show Stock adjustments" in the "Price list" menu.

Price List: Example Price List

Stock adjustment reference		Quantity	Product affected
11/5/2001	Shipment Order 4/5	* 1	Mat-12
		* 2	Lte-3
		* 3	Lgt-23
11/5/2001	Shipment Order 6/3	* 8	Fte-11
		* 2	CH-556

Price List stock adjustments

Stock adjustments are stored in each Product, and can be edited in the Product Info window ([See section "Supply", chapter "Product"](#)).
If you wish to use this feature, you can mark a preference in the "Invoice" section of the Preferences to automatically change stock levels to account for products used in Invoices. These changes will be made when you mark an Invoice/Order confirmation as "Sent".

Importing

About

The easiest way to build or update a Price List is to import data from another file. Selecting the "Import..." menu item in the "File" menu presents you with the import dialogue.
Importing of Products and Contacts is described in the [chapter "Importing Data"](#).

Product

General

About

Products are stored in Price List files. The main window of the Price List is a list of all of the Products contained in the list. This list can be viewed and sorted according to each column ([See section "Display columns", chapter. "Basics"](#)).
The list shows an abbreviated form of each Product.

Creating

A Product can be created by either importing data from a text file or by selecting "New product" in the "Edit" menu while viewing the Price List window. "New product" will provide a dialogue to enter the new Product code".

A unique product code will be provided as a default, you may change it if you

wish. This product code will remain fixed for the Product and act as the reference for all other documents using the Price List.

Products from other Price List windows can be dragged or Copied/Pasted into another Price List. If the Product being moved has the same product code as a product already in the Price List, you will be warned. This ensures that only one Product in a list has a particular product code.

Deleting

A Product can be deleted from a list by selecting one or more Products in the Price List, selecting the menu item "Clear product", "Cut product" or pressing the "Delete" key.

This will delete the Product from the Price List window. The Product then will be deleted from the Price List file when its list document is saved.

Note: When a Product is deleted, its product code is reserved until the Price List is saved. This means that you can not add a Product with a deleted Product's code until the Price List has been saved.

Editing

Once created, a Product can be edited by opening its information window. Double click on the Product or click on it and select the menu item "Open product". The information window will appear to allow editing.

Product Info window

About

The Product Info window is used to display and edit information for a Product. It has a top panel and five other modes to display information.

Menu

The Product Info window has a menu which is only visible when this window is active.

Show Products
Show Product Groups
Show Icons
Insert Quick Link
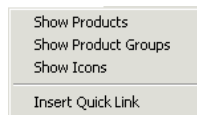
Product Info window's menu

Show Products

Selecting this menu item will show the Product's Price List's main window containing a list of Products included in this Price List.

Show Product Groups

The Product Group mode of the Product's Price List can be shown by selecting this menu item.

Show Icons

The Icons mode of the Product's Price List can be shown by selecting this menu item.

Insert Quick Link

This menu item can be used to insert the characters used to define a Quick Link for reminder text (See the Sale Reminders field description later in this chapter).

Use default "Retail" settings

This menu item reverts the Product's pricing and sales tax to the Product's Price List or Product groups default sales settings. Available in the "Pricing" mode.
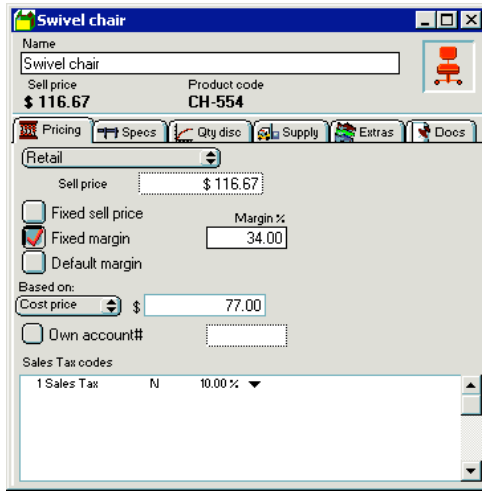
Product Info window

The top panel of the Product Info window displays the basic information for a Product.

Name

The name of the Product can be changed in this field.

Sell Price

The sell price of the Product is shown in this field. Editing of the retail price is done in the "Pricing" mode of the Product Info window.

Product code

The Product code cannot be changed for a Product. It acts as the unique reference to this Product.

Icon

The picture icon for the Product can be changed. Until changed, all Products will have a default icon like this.

Default Product icon

Note: A Product without an icon will use its Product Group's icon if the group has one. This is why a Product in a list may appear with an icon, but in the information window it will appear without.
This icon acts as a dragging tool. Dragging the icon has the same effect as dragging the Product in the Price List and allows you to install the Product into another document.
To select an icon that is already installed in the Price List, double click on the icon in the Price Info window or click on the icon and select the "Choose icon" menu item. The choose icon dialogue will then appear with a list of all the icons installed in the Price List.
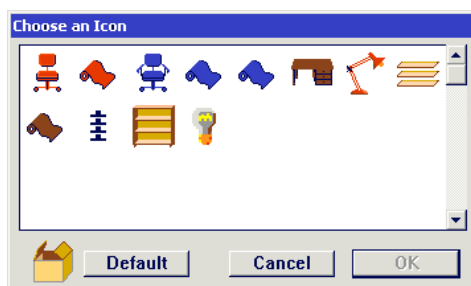
Icon selection dialogue

Double click on one of the icons displayed to select it or click on "Default". The default icon will deselect any icon that was associated with the Product.

Pasting Icons

An icon can also be linked to a Product by selecting the Product's icon in the Info window and pasting an icon or picture from the clipboard.

Disk file icons (Macintosh only)
Icons can be copied from the "Finder". Select a file and then select "Get Info" in the "Edit" menu. Select the icon in the top left of the information window and copy it. Show the Product's information window and Paste the copied Icon into the selected Product icon.

Pictures

Pictures can be pasted as icons. If you have a graphics viewing application, select a picture and copy it. Switch into the SaleSmartz application and paste the picture into the selected Product's icon. A new Icon will be created.
Pasting an icon will perform three actions. First the icon will be added to the Price List, saved and then linked to the Product. If the pasted icon is already in the Price List then only the product link will be set (See section "Product Icons", chapter "Price List").

Pricing

About

The "Pricing" mode shows information about the origin and pricing structure of the Product. When the user level is not "Full access level", this mode is hidden from view. This is to prevent a customer from possibly seeing this information.

Product Pricing mode

Price type popup

If you have more than one price type, this popup menu will be visible and enable you to edit each price type within a product (See section "Price List", chapter "Preferences").

Sell Price

This field contains the Product's current sell price value. This field can be edited only if the "Fixed sell price" mode is selected. If a margin mode is used this field will indicate the Product's sell price for the margin.

Sell Price Modes

The sell price for a Product can be set in three different ways. The simplest way is to type in the Product's price into the "Sell price" field (Fixed sell price). The sell price can also be calculated by using a margin value (See section "Margin", chapter "Basics"). The Product's margin can be set for each Product (Fixed Margin) or in the Product's Product Group/Price List (Default Margin).

Fixed sell price

This check box will select the "Fixed sell price" mode, where the Product's sell price is entered into the "Sell price" field.

Fixed margin

Selecting this check box will activate the "Fixed margin" mode for a Product. In this mode the Products sell price is determined by the margin value you enter in the "Margin" field. The "Sell price" field will be inactive, but will indicate the calculated sell price.

Default margin

If you click in the check box to activate this mode, a Product's sell price will be determined by the default margin for that Product.
This default margin is first taken from the Product's Product Group margin if it has one. If no margin is available for a Product's group then the Price List's default margin will be used. This allows you to change a margin value for a whole range of Products at the same time (See chapter "Price List").

Based on:

If you have more than one price type, you can base one type on another by selecting another type in this popup menu e.g. Retail price = Wholesale + 30% margin. The default is to use the cost price for margin calculations.

Cost price

This describes the cost value of purchasing this Product. This is only used as a reference for yourself and for calculations used in the "Profit" mode of Quotes and Invoices. The cost price is used as the basis for margin calculations.

Own account#

If you export information from SaleSmartz to an accounting system, you can set this product's account code in this field. If no number is entered here then the default account number will be used, from the Product's Product group, or Price list.

Sales tax codes

If a Product uses a Sales tax that differs from its Product group or Price List then you can edit the Sales Tax in this field. New Sales tax values can be added by selecting "New tax rate" in the "Edit" menu whenever the Sales tax field is selected. The choice of different Sales tax rates is defined in the preferences (See section "Price List", chapter "Preferences").
The menu item "Use default Sales tax" reverts the product's Sales tax to its Product group, or Price List's default Sales Tax.

Specs

About

The "Specs" mode shows the general information about a Product.

Product Specs mode

Product Group

This field contains the Product Group that this Product belongs to. Product Groups are properties of a Price List (See section "Product Groups", chapter "Price List").
The Product Group pop up contains a list of all Product Groups contained in the Product's Price List. Select an item from this pop up menu to change the Product's group. This menu also acts as a shortcut to adding and editing Product Groups with the "Add group..." and "Show product groups..." menu items.

Specifications

This is a free text field. It can contain information about a Product such as size and colour. This information is used for example, in the Catalogue to describe a Product being displayed.

Sales Reminders

When a Product is moved into a Quote, a reminder can appear to remind the Salesperson of certain issues. This text will appear in the Quote to allow you to quickly add other related Products into the same Quote by clicking on the underlined quick links.

Quote Sales reminders field

The Sales Reminders field can contain information such as accessories or vital components required when selling this Product, e.g. batteries or cables. The field can simply contain text, or even links to other Products.
If you wish to use the quick link facility to link Products as a reminder, then enclose product codes for these links in " { } " characters. This is a way to tell SaleSmartz to treat the text within these characters as links, e.g. "{CH-554} Swivel chair" will include the product code "CH-554" as a quick link for a

Swivel Chair. You can optionally include a number and a "*" character in front of the product code to automatically add a preset quantity of the linked product e.g. "{2*CH-554} would add two Swivel chairs.
Select "Insert Quick Link" in the "Product Info" menu to add a new Quick Link text block and allow you to type text between the bracket characters.
Note: A closing character "}" must be present to match every opening character "{" when editing this field. If there are an unevenly matched pairs of these brackets then a dialogue will appear to warn you of this.

Another way to link Products as Quick Link reminders is to drag a Product from another window into the reminder field. This will automatically add the product code and name, of the dragged Product, and format the text accordingly.
(See chapter "Quote")

Price breaks

About

The "Qty Disc" (Price breaks) mode allows editing of the price break discounts for this product.
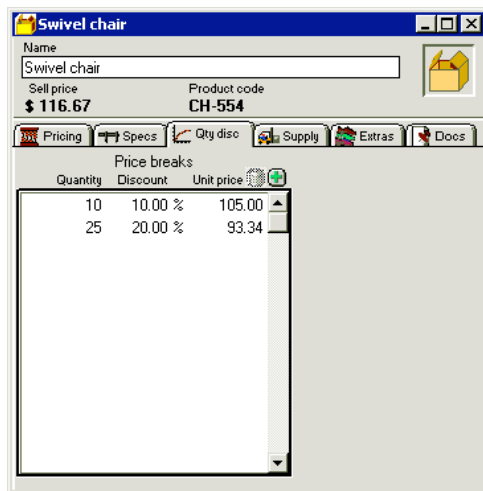
Qty Disc mode

Use the buttons at the top of the list to add and remove price breaks. Click in the list on the numbers, to edit the price breaks.

Quantity

The quantity field determines the minimum quantity required to get the discount.

Discount

The discount percentage is the discount applied to the price once the quantity is reached.

Unit price

This field shows the discounted default price. This is an example and other price types will have the same discount percentage applied to provide a different price.

Price breaks are calculated when a product is placed in a quote.

Supply

About

The "Supply" mode displays the suppliers and stock levels for a Product.
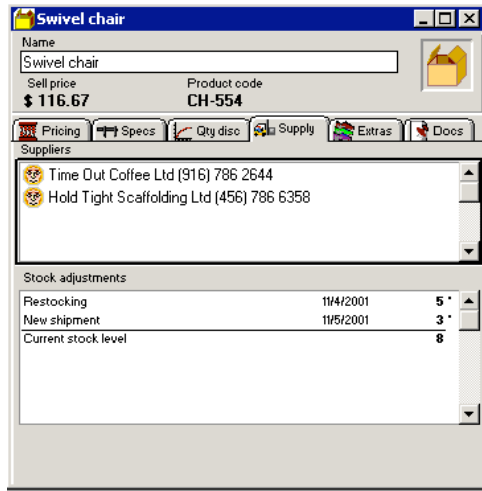
Product Supply mode

Suppliers

The supplier field can contain free text or links to Contact files. This field is used to record the supplier(s) of a Product for your own reference.
Contacts can be dragged from Contact icons in other windows to link them to a Product. Double clicking on a Contact in this field will open the Contact (Supplier) file window.
If you delete all Contact (supplier) links from the Suppliers field, you will be able to type text into this field. You can use this feature if you don't have all of your suppliers in your Contact database.

Stock adjustments

This field is an optional feature for products. You can maintain a record of stock changes for each product. These changes can be deliveries received or orders sent out. A preference setting can be made to automatically take in to account stock used in invoices/orders (See chapter "Preferences").
New stock adjustments can be added by clicking in the stock field and then selecting "New stock adjustment" in the "Edit" menu.

Extras

About

The "Extras" mode allows you to edit Contact properties and an optional feature for products which may have several variations e.g. colour, texture, material.
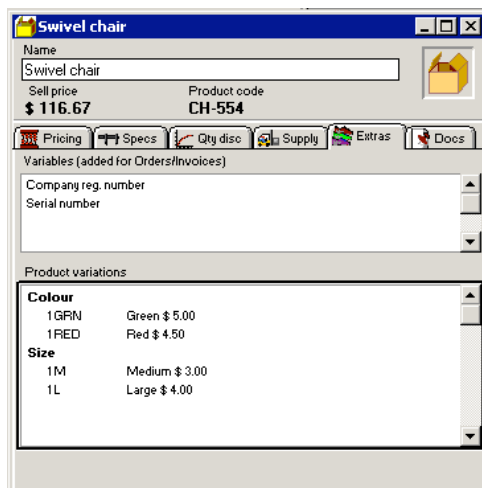
Product Extras mode

Properties
Contact properties can be linked to a product. These properties will be installed into a contact when a Quote containing this product is converted to an Order/Invoice e.g. installation dates or service contracts.
New properties are added by clicking in the properties field and selecting "New property" from the "Edit" menu.

Product variations

New variation groups are added by clicking in the variation field and then selecting "New variation" in the "Edit" menu. Click on "Variation group" and

then "OK". Variation groups can contain several variations. The Matrix button allows variations to be defined in a matrix, useful for configuring multiple quantities for different variations of a product.
Variations can be added in two ways:

1) Select "New variation" in the "Edit" menu, then enter the variation name and click "OK". This type of variation may also have a price component.

2) Products can be dragged from a Price List and added after each variation group to define the products variations. This means that for a variation group such as colour, products of "Red" and "Blue" can be created in a Price List and then dragged to the product shown above.

The advantage of having variations in the form of other products is that each variation can have its own price if necessary e.g. a plastic finish for a table is cheaper than a wood finish.
Before this Product is installed in a Quote, a dialogue will appear to let you define which variation of this product you want to install.
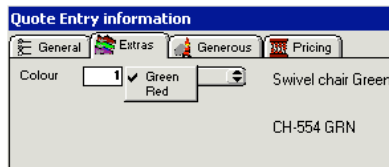
Defining product variations in a quote

Defining a product variation matrix in a quote

Once installed in a Quote, a Product with variations behaves almost exactly like a normal Product.

Docs

About

Documents can be linked to Contacts, Products and Product bundles. The documents can be of any type available on a disk.
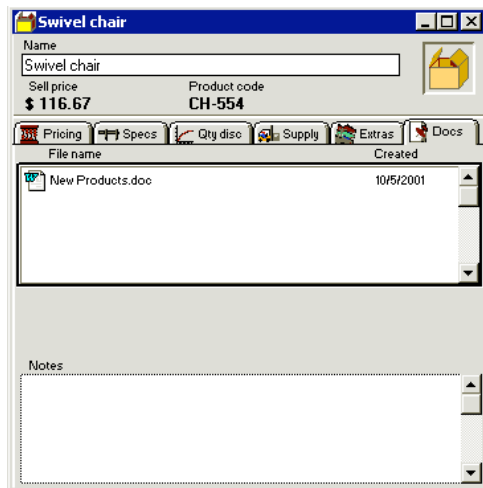
Document link mode

Creating

A link is created by first clicking on the list field to activate it, then selecting "New document link" in the "Edit" menu. A dialogue will appear allowing a file to be selected. When selected this file will appear in the document list.

Deleting

Links are deleted by selecting the Document link in the Document list, then selecting "Clear document link" in the "Edit" menu or pressing the "Delete" key.

Opening

To open the document, double click on it or select it and choose the "Open document link". The application that created the document (if available) will then be launched with the document to be opened. Be sure to have enough memory available to open this other application, if memory is not available then a warning dialogue will appear to tell you.

Catalogue

General

About

Catalogues store references to Products in Price Lists and bundles of Products. Catalogues are used to display Products in a graphical, organised and more descriptive way than Price Lists. The structure of a Catalogue is Book-like as in a Quote.
Bundles can be built in Catalogues as groups of Products. These can be used for "special deals" or set configurations. These bundles are stored in the Catalogue file whereas the Products are not.
"Source documents" is the term given to files used to store the source objects for entries in a Catalogue or Quote.

Window
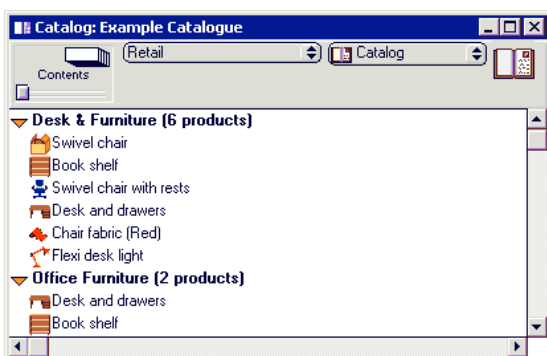
Catalogue window

Price type popup

If you have more than one price type, this popup menu will be visible and enable you to view each price type for the products (See section "Price List", chapter "Preferences").

Page switcher

To the left of the Catalogue window is a Page switcher. This navigates through the Catalogue (See section "Catalogue/Quote", chapter "Basics").

Section name

The section name field is used to edit the name of a section when it is viewed in the section (graphic) view.

Menu

The Catalogue has its own menu which appears when the Catalogue window is selected.
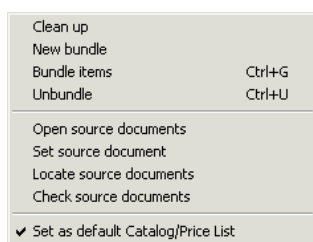
Catalogue menu

Clean up

Align the Catalogue entries when in section (Graphic) view.

New Bundle

Create a new empty Bundle object.

Bundle items

Group the selected Products into a new Bundle object.

Unbundle

Break up the selected bundle(s) into source Products.

Open source documents

If source documents (Price Lists) for any of the Catalogue entries are closed, this menu item will open the source files. These files will be opened but hidden and can be seen in the "Window" menu.

Set source document

Sets the source document for each of the selected entries via a file select dialogue.

Locate source documents

If some of the source files have been moved or deleted from a disk, this menu item will open a dialogue to locate the correct source file (See section "Catalogue/Quote", chapter "Basics").

Check source documents

Quickly check all source files to make sure they are open or located on the disk.

Set as default Catalogue/Price List

This will set this catalogue as the preference for the default Catalogue. The windows menu will then open this catalogue as the default, or when SaleSmartz starts up, if you have set the preferences to do so (See section "General", chapter "Preferences").

Creating

Select "New document" from the "File" menu and then choose the "Catalogue" document type.

Deleting

A Catalogue can be deleted by removing its file from disk.

Opening

A Catalogue can be opened by opening the file on disk.
The application's Catalogue can be opened by selecting "Open Catalogue" in the "Windows" menu. This will open the default Catalogue file, the location of which is stored in the preferences. If no Catalogue is currently set as the application default, then you will be asked to locate it with the preferences dialogue (See section "Catalogue", chapter 24. "Preferences").
A Catalogue can also be opened from a Quote by selecting the menu item "Open source documents" or when an object requests Bundle information (such as double clicking on an object in a Quote). Opening Quotes can also automatically open related source Catalogues if the preferences are set to do this (See chapter "Preferences").

Catalogue entry

About

A Product installed into a Catalogue creates a catalogue entry object. Each catalogue entry remembers the file that it came from. The item's file can be changed by selecting the item, selecting the "Set source document" menu item, and then choosing the new file. Products are represented by reference in Catalogues, they are not stored there. This means that a Catalogue always requires a Price List to display Product prices and icons.
Catalogue entries can appear in different forms. In the section (or graphic) mode catalogue entries will appear as in the example below if the preferences option for large catalogue entries is on (See section "Catalogue", chapter. "Preferences").
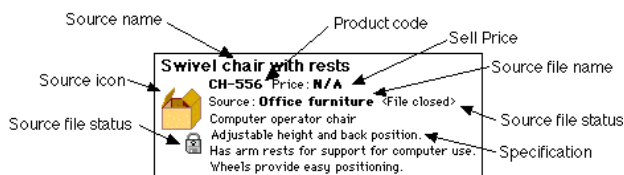
Large Catalogue entry

If the preferences option is set to small Catalogue entries then the catalogue entry will appear as in the figure below.

Small Catalogue entry

The same Catalogue entry will appear in a simplified form in the contents mode of the Catalogue.
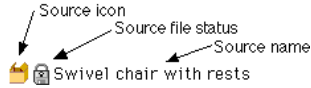
Contents Catalogue entry

Source icon

The Product's icon is shown here, when the Product's Price List is open.

Source name

The last updated name of the Product is shown here.

Product code

This is the reference code of the Product, the link to the Product in the Price List. This is hidden when the user level is not "Full access level".

Sell price

This is the current price of a Product, only available when the source Price List is open.

Specification

A sample of the specification stored for the Product in the Price List.

Source file name

The name of the Product's source file. This is optional and can be set as a preference (See section "Catalogue", chapter "Preferences").

Source file status

The state of the Product's source file. This is hidden when the list file is open. It will show if the entry's Price List file is closed or has been moved/deleted.

Creating

Products can be selected and dragged from a Price List window into a Catalogue window. Copying objects is done in a similar way, by selecting Product(s), copying and then pasting into the Catalogue window.
Catalogue entries can also be dragged or copied from one Catalogue to another.
A Product can be placed into a Catalogue by using the "Find" dialogue (See chapter "Finding").

Deleting

To delete a Catalogue entry, select it, and select "Clear catalogue entry" or "Cut catalogue entry" in the "Edit" menu, or press the "delete" key.

Copying a Picture

As mentioned earlier, Catalogue entries can be copied from a Catalogue window. When an entry is copied in the section (graphic) mode, a picture of the object is also copied (as in a Quote). This picture can then be pasted into another application to be used in drawing documents.
This picture can also be used in the printing of a Catalogue.

Printing

About

A Catalogue is printed by first choosing a "Print Template" file, then selecting "Print" or "Print preview" in the "File" menu (See chapter "Print Template").

Bundle

General

About

Bundles generally consist of collections of Products. They have a unique code, name, and a sell price, and are similar in function to Products. Bundles can be used too as standard configurations or special price deals.
Bundles can only be stored in Catalogues, but can appear as entries in Quotes.

Bundle icon

Bundles can be quickly recognised by their icon outline as in the figure above. The icon content can be changed, but it will always have the same surround. In the contents mode, bundles will always have this small icon .

Creating

Bundles can be created by selecting "New bundle" in the "Catalogue" menu. A unique code is required to create the Bundle. A dialogue to enter the code will be shown with a default code.
Use this code or type a new one. Click "OK" and the new Bundle will be created with default values.
Bundles can also be created by selecting a group of catalogue entries and selecting "Bundle items" in the "Catalogue" menu. After entering the code, the selected catalogue entries will be included in a new Bundle.
The new Bundle's initial sell price will be the sum of all the Bundle's Products' sell prices. Specifications and sales reminders will be collected from all included Products to provide these properties for the Bundle.
Products can be added to a Bundle by dragging or pasting them into the Items mode of a Bundle info window.
As with other Catalogue entries, Bundles can also be dragged or pasted from other Catalogues.

Deleting

Bundles can be removed by first selecting the Bundle in a Catalogue, and selecting "Clear catalogue entry" or "Cut catalogue entry" in the "Edit" menu, or by pressing the "Delete" key.
Bundles can also be "dismantled" by selecting the bundle and choosing the "Unbundle" menu item. It will then be broken into its Product components.

Editing

Bundles are edited in the Bundle information window. This is opened by double clicking on a bundle or selecting it and selecting "Edit catalogue entry" in the "Edit" menu.

Bundle Info window

About

The Bundle Info window is used to edit information about bundles.
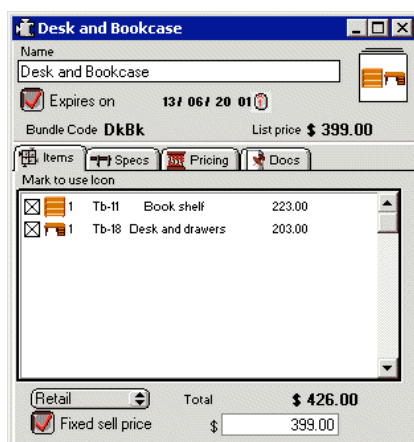
Bundle information window

Name

The name of the Bundle can be edited in this field.

Icon

The icon representing the Bundle is shown here, it is changed in the "Items"

mode. This icon acts as a dragging tool. Dragging this icon can install this bundle in another document in the same way as dragging from the Catalogue.

Expires on

This option can be set to display the expiry date for bundles. A warning will appear if you try to use this bundle after this date.

Bundle code

The unique reference for other documents using this bundle.

List price

The saved sell price of the Bundle is fixed or uses the total of its Products sell price values. It is edited in the "Items" mode, later in this chapter.

Menu
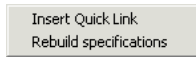
Bundle window menu

Insert Quick Link

When editing the "Sales reminders" field, selecting this menu item will insert a new Quick Link character code (See section "Specs", chapter "Product").

Rebuild specifications

When first created, a Bundle takes the specifications and sales reminders from the Products used to create the Bundle. If you wish to rebuild these specifications at a later time, select this menu item.

Items

About

The "Items" mode of a Bundle info window shows the list of all Products included in the Bundle. It is not essential to have Products as components of a Bundle, but their attributes can be included and viewed from within the Bundle.

Bundle Items mode

Components

The list of included Products is shown in the "Components" field.
The check box to the left of each line in this field sets the appearance of the Bundle's icon. Clicking the check box "on" will include this Product's icon in the Bundle's icon. A maximum of four icons can be shown and they will appear in order of inclusion, from top-left to bottom-right.

Position of different quantities of bundle icons.

To the right of the check box, is the Product's icon, if its source Price List is open. The Product's code is visible if the user level is set to "Full access". The name of the Product is the next item in each line of the components field, and then the sell price. This price is also only available if the Product's Price List is open.

Price type popup

If you have more than one price type, this popup menu will be visible and enable you to view each price type for the bundle (See section "Price List", chapter "Preferences").

Total

When all Products have open Price Lists and therefore sell prices listed, a total will appear at the bottom of the window. This is the retail total of all of the Products. It can be used to determine the Bundle's price.

Fixed sell price

The sell price of the Bundle is shown in this field. This can be fixed and entered into this field, or it can be automatically calculated from the sell prices of its component Products. The "Fixed sell price" button sets the price mode to use. Note: When the "Fixed sell price" mode is off, the retail field may not contain a value if one or more of the component Products has a closed source Price List. This is because Products in a Bundle require their source Price List file open to read price information. Double click on a Product will first open its source Price List, and then its info window.

Specs

About

The "Specs" mode of a bundle shows a description of the Bundle.
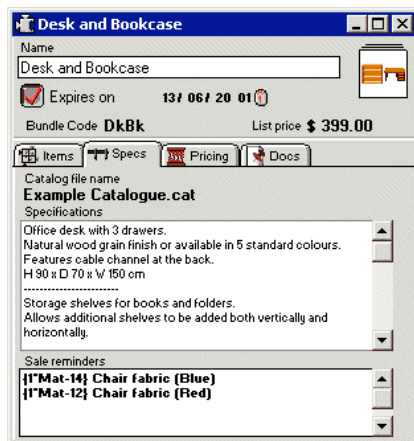
Bundle Specs mode

Catalogue file name

A reminder of the name of the file that the Bundle belongs to.

Specifications

This is a free text field. It can contain descriptive information about the items in a Bundle.

Sales reminders

When a Bundle is moved into a Quote, a reminder can appear to remind the salesperson of certain issues (See section "Specs", chapter "Product" for a description of Sales reminders). These reminders can be edited in this field, or taken from the bundled Products.

Pricing

About

The "Pricing" mode of a Bundle info window contains the account code and Sales Tax fields.

Bundle Pricing mode

Account code

This account code is used only for exporting to accounting systems.
The bundle's own sales tax can also be edited in this mode. If you don't set a
sales tax for a bundle it will use its product component's, or the application's
default sales tax.

Own tax rate

By default, a bundle will inherit the tax rates from it's components. You can
override these tax rates by clicking on "Own tax rate" end editying the taxes in
the fields below.

Docs

About

Documents of various types can be linked to the Bundles such as pictures and
data sheets (See section "Docs", chapter "Product").

PrintTemplate

General

About

A Print Template provides a format for printing a Quote/Invoice or Catalogue. These
templates can be used for Printing and Faxing. If you want to use templates for EMailing
and saving to disk files, use SZ Templates instead (See Chapter "SZ Template").

The position and text appearance for each of the components of these printed documents
can be customised. These components are represented by "Template blocks". These blocks
are manipulated to provide the desired layout of the template. Additional text and picture
blocks can be added to enhance the printed result.
The template consists of five sub layouts. These may differ from each other if required.

1) Preceeding page (optional). This page can contain fields such as Fax header
information. If this part contains no blocks, it won't be printed.

2) First product page. This is always part of a printout. This will probably contain
customer address details in a Quote or Invoice.

3) Middle product page. If the total number of pages in a printout exceeds two, then this
sub layout is used for all the pages between the first and last, i.e. in a 5 page printout,
pages 2,3,4 will use this sub layout.
This layout could contain simple information, such as the page number or the date.

4) Last product page. This layout is also always part of the printout. When printing, the
Application will check to see if the information fits on to the first page. If it does, it then
checks if the data will still fit when the blocks from the last page are added. If not, another
page will be added to show the last page's blocks.
Switching between the three layouts is done by selecting the sub layout from the "Display
as" pop up menu at the top of the Print Template window.
Note: Not all information will be available for printing from a Catalogue. Some options
will be ignored, such as totals, finance, discount and customer details.

5) Following page (optional). This page can contain information to be appended after the
product information pages. It woln't be printed if it contains no blocks.

Hints

EMail quotes/invoices

You can print SaleSmartz quote/invoice templates to PDF files and eMail attachments. Create a Quote/Invoice cover eMail in the merge templates folder ("File" menu - "Merge with" - "Edit merge templates"). When you print preview a Quote/Invoice, select "EMail attachment" from the print preview plugin menu (bottom right) and it will merge the cover email with the customer name etc. fields, and also attach the template as a PDF file.

Print templates

Creating

To create a new Print Template, select "New" from the "File" menu and then choose the "Print Template" document type.

Opening

A Print Template can be opened by opening its file on disk.

Editing

A template consists of three types of blocks. By default, a "Columns" block is created. This is essential for printing, and can not be removed. Text and picture blocks can be added as well.

Creating Blocks

Template blocks are created in different ways depending on the type of block you wish. Text blocks can be created by dragging the "Drag new block" button in the top of the window, to the template layout area.
Text blocks can also be created by selecting the "New template block". A default block is created and placed at the top left of the window.
Picture blocks are created automatically by pasting a picture from the clipboard.

Deleting blocks

Template blocks can be deleted by first clicking on them to select them and choosing the menu item "Clear template block" or pressing the "Delete" key.

"Block info" dialogue

Double clicking, or selecting a block and selecting "Edit template block" in the "Edit" menu, will display an information dialogue. Each block's attributes are set in this dialogue. Each block type will display a different block info dialogue but the lower part of each dialogue will remain the same. This part applies to both text and picture blocks (See the following sections for more information on block editing).
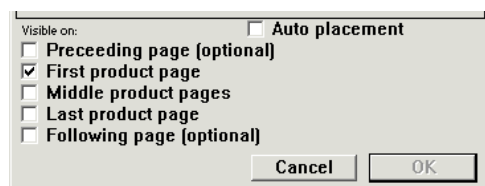
General block attributes part of a Block info dialogue

Preceeding page, First page, Middle pages, Last page, Following page

The sub layout(s) that a block will appear on are selected using the three check boxes at the bottom left of the dialogue. Column blocks are always visible on all sub layouts.

Auto placement

Check the "Auto placement" option on when you wish to automatically place a block which lies below the columns block.
The columns block will change in vertical size depending on the quantity of Products being printed. As a result of this, blocks below the columns block may appear to have a large white space between them, and the columns block.
Checking the Auto placement option on will cause a block below the columns block to shift to compensate for the size change. Its vertical position is adjusted to be the same distance below the columns block, even when the columns are shorter than in the template.

Appearance

The block's font, style, alignment and size can be changed using menus. The type and width of border can also be set for a block using the "Border" menu.

Border clearance relates to the gap between a template blocks content and its edges. This is especially useful in the Column block when you wish to increase the gap between various lines of text.

Select a text block or a part of a columns block and then choose the attribute from the menus.

Column block

Column blocks display the content of the Quote/Invoice or Catalogue. Print preferences can be set, to customise the appearance of the printed result.

A column block is divided into different parts and font information can be set individually for each part.

Sample printed columns

The columns block has more attributes than the other two block types. The order and content of each column can be set. The font and border settings can also be set for individual cells in the block.

Columns block

To the right of the columns block are buttons with ticks or crosses. These buttons define which rows will be included in the final print out. Click these buttons on or off to change the printed result.

Note: You will have to select the columns block by clicking in it in order to see the buttons and scroll bar in the right of the columns block.

Header

The header is the name of the content of each column. The text appearance is set for all of the headers together.

Section name

This is the name of each section of Products in the Quote/Invoice or Catalogue. This cell will always remain visible in the template edit window, even if the "Print section name" option has been turned off.

Section picture

The graphical (Icon) view of each section of Products can be included and printed. This view is created in the source Quote/Invoice or Catalogue and appears the same as a section (graphical) view in these documents.

The alignment and border for this picture can be defined in this cell of the columns block.

Content

As well as for the whole block, the size, font and border for each cell in the column block can be set individually. The size and content of each column can be changed at the top of the block (See section "Display columns", chapter "Basics").
The Product specifications are shown under any columns defined as "Description". This is shown on the printout only for a Catalogue Product or if the "Show description" option is checked for a Quote entry object (See chapter "Quote").

Totals

The total cells can each be set to individual text appearances. They will always be placed on the right hand side of the columns block.
The costs/tax and finance reflect the costs mode of a Quote or Invoice.
If total cells are not used, such as finance and costs, they will not be printed.
Note: The header titles used in the column block can be changed if you wish. Double click on the block to show the "Block info" dialogue, choose one of the headings modes with the pop up menu in the top left of the dialogue and then change the text in the appropriate field(s).

Column Block Info

Double clicking on the Column block will show the Column Block Infor Dialogue
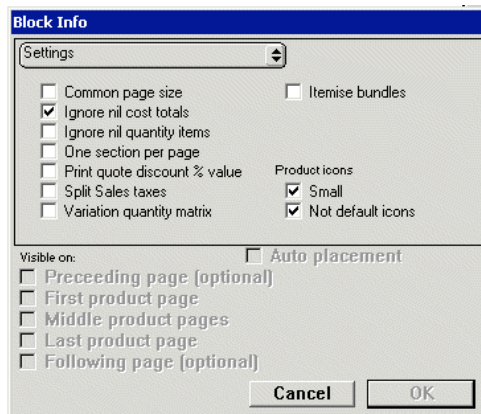
Column block info dialogue

Common page size

The column block in each sub-layout has the same height. The width of the column block on each sub-layout is always the same.

Ignore nil cost totals

If the pre-tax costs total or the non-taxable costs total are nil then this total will not be printed.

Ignore nil quantity items

When you break orders/invoices into part deliveries, some entries may have a nil value for quantity. These items can be removed from the printout by checking this option..

One section per page

Each section in the Quote/Invoice or Catalogue will be started on a new page in the printed result. Sections that will not fit on to a single page in the print out will be carried across to the next one.

Print quote discount % value

When the overall quote discount is printed, you can choose to print the discount as a percent value as well as the money value, by using this option.

Split Sales taxes

If you have multiple tax components in a Invoice/Quote, this option will split them and show the total for each.

Variation quantity matrix

This option will show products which have variation matrix, as a grid of quantities (See section "Extras", chapter "Product").

Product icons

Icons can be printed for each product line by choosing "Icon" from the column's content pop up. The placement of these icons is determined by the column definitions in the columns block.

    Small

    With this option, icons will be printed in small form instead of the normal large form. Use this option to reduce the line height of each row if you don't use a larger font size, i.e. a font smaller than 14 point.

    Not default icons

    Products which have no icon assigned to them normally appear with a default icon. When you chose this option, these icons will not appear in

the printed result.
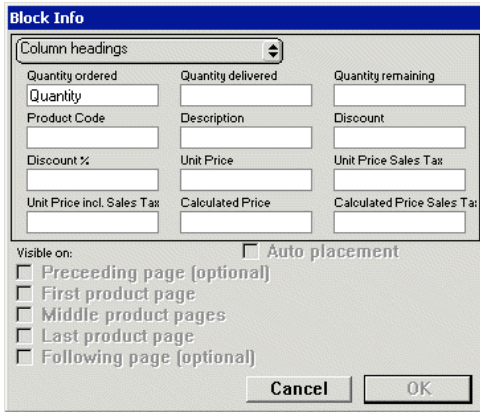
Columns block info, Column headings mode

The pop up menu at the top of the columns block dialogue allows you to change other information for a block.
The text headings which appear in a print out can be changed if you wish. Each text heading has a field in which you can type. Any text entered in a heading field will be used to replace the associated heading text in the print out.
The totals headings option in the pop up allows you to change headings associated with totals.
Note: These changed headings will not appear in the Print template window, but will appear in when a document is printed using this template.

Text block

Text blocks can contain information about the Quote/Invoice, Customer (only for Quotes and Invoices) or other sources.
Text blocks are created by selecting the "New template block". A default block is created and placed at the top left of the window.
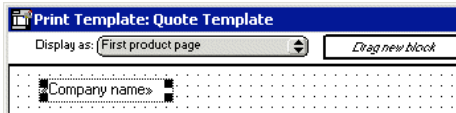
New text block

The text content of each block can be taken from one of six sources and is selected in the text block info dialogue. This dialogue is opened by double clicking on a text block.
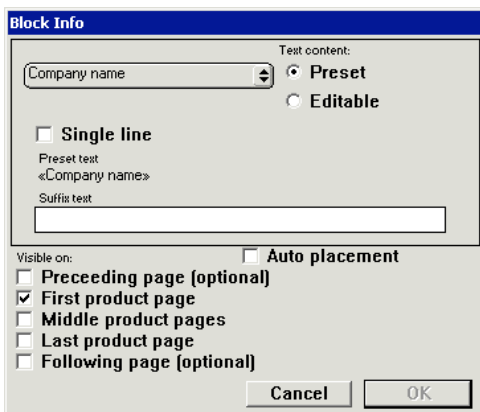
Text block info dialogue

The sources of the content of a text block are:

1) Preset text. Preset labels can be added to the template. The text content of these blocks can be chosen from the pop up in the Block info dialogue. Labels, such as Contact name and address are set from the attributes of each Quote/Invoice. Other labels, such as date, time and page number are calculated when printing.

2) Editable text. You can define your own "Standard text", which will appear on all printing, such as headings or greetings. This text can be changed for each Quote/Invoice /Catalogue just before printing, in the "Print preview" dialogue.

Single line

If you only wish to use a single line of preset text, check this option on. This could be used for example for the Contact phone numbers field, if you only wanted to show the first phone number from several in this field. The number to the right of the check box represents which line you wish to use.

Suffix text

If you wish to place any text after the preset text, enter it in this field. This can be useful for example if you wished to place a comma after a person's name, but could not always be sure how long the name was.

Picture block

Picture blocks can contain such items as company logos or maps.
Picture blocks are created by pasting pictures (type "PICT"(Mac)/"Bitmap"(PC)) from the clipboard. A new block with the picture will be created. The picture content of this block can be changed in the "Block info" dialogue by pasting a new picture from the clipboard into the "Picture" field.
To get the best quality picture printing, paste a large or high resolution picture into the template. Resize the new picture to make it smaller which increases the quality.
Most printers have a higher resolution than a screen and thus pictures of a normal size will appear with jagged edges. Reducing the size of a picture will scale it and increase the resolution and hence the quality of the printed result.
You can reduce the size of a picture with a %-scale by double clicking on the picture and typing in the vertical and horizontal scale values in the "Block info" dialogue.

Printing a Quote/Invoice or Catalogue

When ready, a Quote/Invoice or Catalogue can be printed using a template. The printed appearance will be determined by the chosen "Print Template".
When you have a Quote/Invoice or Catalogue open, you can choose a template file from the list beside the menu item "Choose template" in the "File" menu.
A scan of the disk can be made to search for template files by selecting "Look for templates" beside the "Choose template" menu item. Templates are installed by simply saving them into SaleSmartz's folder, or a sub folder of this. File aliases/shortcuts can be used to link file servers to your application's folder. Place an alias/shortcut to a shared disk inside the home folder for SaleSmartz. SaleSmartz will then use this alias/shortcut when searching.
This scanning process is done once, automatically when the files are first needed.
This template choice will then be stored and saved with the other Quote/Invoice or Catalogue information.
Selecting "Print preview" in the "File" menu when viewing a Quote/Invoice or Catalogue will show the printed format before it is sent to the printer. The page format shown includes the selected template's latest changes. This means that changes can be made to an open template, without saving, and these will be reflected in the printout.
Text labels in the template can be edited in the "Print Preview" mode. This allows last minute changes to a printout.

Print preview: Sales dept

QUOTATION

16 October 1995

Pioneer Piping Ltd
PO Box 1151
Boston
MA 25642
USA

Attn: Dave Dunstan

Dear Dave,

Further to our conversation it is my pleasure to provide you with the following prices.

Quantity	Description	Unit Price	Calculated Price
	Bobs Office		
1	Chair fabric (Blue)	12.00	12.00
1	Book shelf	223.00	223.00
1	Swivel chair with rests	203.00	203.00
1	Desk and drawers	203.00	203.00
1	Flexi desk light	83.00	83.00
1	Light Bulb	2.37	2.37

Reset text | Quote Template ◆ | | Default printer ◆ |

OK | Edit selected template | Cancel | Print

"Print preview" dialogue

Reset titles

To change all the fields back to their original values, click on "Reset titles".
Note: The columns block field can not be edited in this manner.
It is better to store these changes in the Print Template window if you modify these text fields regularly.

Template chooser popup menu

You can choose another template by selecting from the popup menu in the bottom of the window. This will update the window with the new template

Edit selected template

This button will close the print preview window and open the selected templates source file for editing.

Plug-in menu

This menu will allow you to choose the plug-in to use to print/fax/email or save the document. Documents can be emailed using Text, HTML or PDF file format. For SZ Templates (See chapter "SZ Template")
To fax a document, be sure to install your fax software first. Choose the fax option as the current printer (consult your fax software manual) and print in the same way as you would to a normal printer.

TimeManagerCalendar

General

About

The Time Manager section of SaleSmartz has many functions. It is a Contact manager, day planner, organiser and reminder system. It is designed with simplicity in mind, but has the support of a very sophisticated system.
The central component of the Time Manager is the To Do Memo. It appears as a simple window where text can be entered, but can be expanded to include much more detail if required.
The term "To Do List" is used to describe the Time Manager in SaleSmartz. The To Do List contains and organises all To Do Memos.

Menu

The Calendar menu is always visible.

New To Do Memo	Ctrl+T
New Banner	
Read out today's To Dos	
To Do List	
Monthly planner	
Weekly planner	
Daily planner	
Access...	
New message center...	
Open message center	
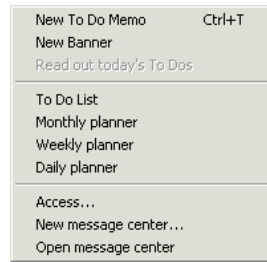
Calendar menu

New To Do

Creates a new empty To Do Memo and opens its window. This can be done at
any time (when there is no dialogue open) without closing documents.

New banner

A new banner can be created by selecting menu item. See the section on banners
later in this chapter.

Read out today's To Dos

If you have a compaitble sound synthesizer installed, this menuitem will read out
the dail to dos. This option can also be set at startup (See section "General",
chapter "Preferences")

To Do List

Show the To Do List window, the list of all To Do Memos.

Monthly planner

Show a monthly view of To Do Memos.

Weekly planner

Shows the window with the To Dos for a whole week.

Daily planner

Shows the window with the To Dos for a particular day.

Access...

Define the access you will allow for other users connecting remotely to your To
Do List. Connecting remotely to your To Do List is only allowed if you place
your To Do List on a networked shared disk.

New Message Centre...

Selecting this menu item will create a Message Centre file. A Message Centre is
effectively the same as a To Do List file but can be opened separately. This can
be placed on a networked shared disk and is used to receive memos from other
users, if you turn off or take your computer away from the network (See section
"Remote access" below).

Open Message Centre...

Open the application's default Message Centre to view received memos.

Remote access

Additional menus appear for a To Do List if you open a Message Centre or
another user's To Do List. As mentioned before, a Message Centre operates in
the same manner as a To Do List.
When you open a Message Centre or another user's To Do List another To Do
menu will appear. This operates in the same way as the application's To Do menu
but only applies to the opened file.

Creating

The "To Do List" is created if necessary when the application is launched. A file
called "To Do List" will appear on disk. This file can then be placed elsewhere if
you wish but is always required to run SaleSmartz.

Deleting

The To Do List file can be removed, but will be recreated when SaleSmartz is
launched again. Do not remove the To Do List file while the application is
running.

Opening

The three To Do view windows can be opened in the "To Do" menu or the To Do
List window can be opened by opening its disk file.
Saving
The "To Do List" file is automatically saved when the application quits or when
one of its view windows is closed. To Do Memo windows are saved when they
are closed.

To Do Memo (manual)

About

The To Do Memo acts as the central component of the To Do List. In its simplest form it appears as in the figure below. There are two forms of memo. One is the manual version as described here and the second is an automatically created by the application (See section "To Do Memo (automatic)" later in this chapter).

Basic To Do Memo

The colour of the window can be set as a preference (See section "To Do", chapter "Preferences"). The default colour for a manual To Do is yellow.

Creating

The To Do Memo can be created in many ways.

Selecting the "New To Do" menu item will create a simple memo window as in the figure above.

Many objects can be dragged into one of the three To Do windows (List, Month, Week and Day windows) to create a new memo.

Objects such as Contacts from Contact Lists, Products from Catalogues and Price Lists, Quotes/Invoices and Memos from Contact windows can be dragged into the windows to create a new memo. When created, the memo will include an icon of the object being dragged, this is called a Hot link and acts as reference to the source object (See section "Hot Links" later in this chapter).

Deleting

Manual To Do memos are deleted by selecting the memo in any of the three main windows, selecting "Clear To Do" in the "Edit" menu or pressing the delete key.
They can also be deleted when a memo's window is open by clicking the delete memo button.
This button is visible when you display the information panel at the top of the To Do Memo window.

Editing

When a memo is first created, its window will appear and immediately allow text to be typed into it. This text will automatically be saved when you close the window.
This allows you to quickly open a new memo with the keyboard shortcut -T(Mac)/Ctrl-T(PC), type a reminder and close the memo, knowing it has been saved. Later when you have more time can the memo be opened, viewed and changed.
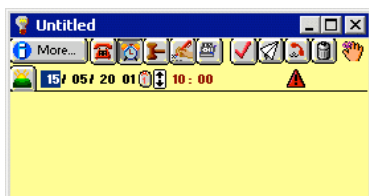
Memo window (Date dependent)

The function of each of these buttons is listed here.

More

Show the detailed information dialogue for this memo.

Types.

The following buttons set the type of the memo. Clicking on one or more of these buttons will add this type to the memo.

Phone

A phone call was received or should be made.
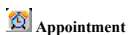
Appointment

An appointment to do something.

Meeting

A meeting to be attended.

Quote

This memo relates to a Quote.

Invoice

This memo relates to an Invoice.

Done

A personal reminder whether or not a memo has been actioned.
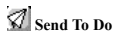
Send To Do

Click this button to send a To Do Memo to another user across the network.

Dial

Automatically dial phone numbers (See section "Dialling", chapter "Basics")

Delete memo

Delete this To Do Memo from the To Do List

Warning

Shown when this memo is overdue
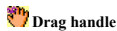
Drag handle

Drag this icon to move this memo's information to another window.

Due date

If "Date dependent" has been checked "on" in the information dialogue, then a "Due date" field will appear to show this date. It can be edited by clicking in the date or time fields and editing them (See section "General", chapter "Basics").

Now

Set the due date of this memo to the current date and time.

Detailed information

Clicking on the "Info" button in a memo window will open the information dialogue.
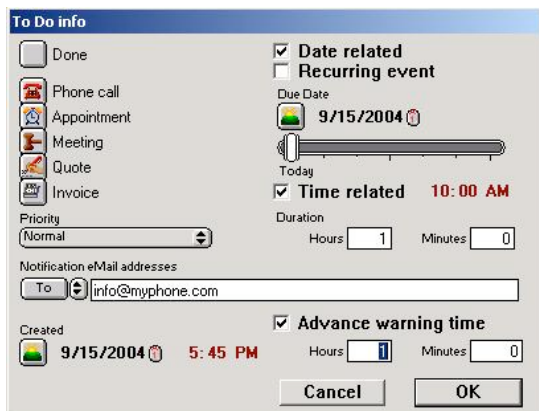
<p align="center">To Do Memo information window</p>

This window allows editing of the data stored in the memo.

Done

As in the memo window, "Done" is a reminder to you that the memo has been actioned or not.

Type

"Type" buttons appear again down the left side of the dialogue. These have the same action as the buttons on the memo window top panel.

Priority

The priority of the memo can be set in this pop up menu. The setting can be one of "<None>", "Normal" or "High". This setting will affect the memos text appearance in the main windows, as a reminder.

Notification eMail addresses

You can enter one or more eMail addresses in this field to have this To Do memo sent to the recipients when it is due, or for advance warnings.

Created

This date can be edited and acts as personal reminder of when the memo was created.

Date related

This option enablesl date and time fields. It means that the To Do Memo has a specific time.

Recurring event

If you have an event that repeats e.g. a birthday or paying monthly wages, you can choose this event type.
The "Start date" sets the date for the first occurrence of this event e.g. a birthday would have the birth date, with the year of birth, or simply last year.
"Every period" defines how often the event occurs e.g. a birthday would be "Every Year".
"On period number" chooses when the event occurs e.g. a birthday would have "On day 0" as the "Start date" defines the actual date.
Other events could be monthly wages e.g. "Start date" of last month, "Every 1 month", "On Tuesday 1", if you wanted to remind you of wages on the first Tuesday of each month.

Time related

If you can enter a specific time for this memo, use the "Time related" option. Type the time value into the field to the right of this button.

Advance warning time

Each To Do Memo can have an warning to remind you about the memo in advance. This warning can be enabled and the period set with the fields at the bottom right of the dialogue. A default warning will be set for each new To Do Memo according to the setting in the preferences (See section "Notify", chapter "Preferences").

Notification

When a To Do memo becomes due, actions can be taken to warn you. These actions are set in the preferences (See chapter "Preferences").
An alert icon will appear in the To Do Memo window and in the "Names" column of the To Do List window.

Other applications

To Do due warnings can also be made to appear in other applications while you are using them.

To Do Memo (automatic)

About

As seen in the Contact window, many items are time dependent. Quotes and Invoices have due dates, Contact memos also have dates. When a Contact file is opened, To Do Memos are created for each of these. These To Do memos are automatic and have a different colour to differentiate them from the normal To Do Memos. The content of Automatic To Do Memos cannot be changed
A Quote for example has a due date, which becomes the To Do Memo's due date. A Hot link is also placed on the To Do Memo window to open the Quote concerned (See Hot link section later in this chapter).

Creating

Automatic To Do memos are created or updated when a Contact file is opened or saved.
The "Contact List" also updates these memos when scanning for Contact files.
The latest automatic memos can be read at start-up by setting the "Show Contact window" Preference (See section "General mode", chapter 24. "Preferences").
This is recommended for a network based system, as other users can change Contact files without updating your own To Do List.

Deleting

Automatic To Do Memos are managed by the To Do List. These memos will be deleted when they have are no longer required, e.g. a Quote has been deleted or deactivated.
Automatic To Do memos can also be deleted by selecting the memo in any of the three main windows, selecting "Clear To Do" in the "Edit" menu, or pressing the delete key.
Although they have been deleted, they will appear again if the Contact file they are linked to is opened or saved.

Hot Links

About

A Hot Link is an object which can be placed on to a To Do Memo. It is a link to another part of the application.

Creating

Hot links are created by dragging objects onto a To Do Memo. It can be any one of these.

Contact

Dragged from a Contact address mode or the Contact List window.

Dial

Created by the "Telephone" dialogue.

Quote

Dragged from the history mode in the Contact window.

Invoice

Dragged from the history mode in the Contact window.

Memo

Dragged from the history mode in the Contact window.

EMail

An email dragged from the Mail Centre or a contact History.

Catalogue

Dragged from a Catalogue window.

Report builder

Dragged from Report builder window.

Report

Dragged from a Report window.

A hot link appears as an icon and name (in italic text style) on a To Do memo.

Netweb Modems Ltd.
Bruce Jones
0181 123 9804

Contact Hot link

It can also be created by dragging a Hot link from another To Do memo.
Another form of Hot Link is provided for Products. This link stores lists of Products and acts as a very simple calculation area and is called a Quick Quote, described later in this section.

Deleting

A Hot link is deleted by selecting it, and then selecting "Clear Hot link" in the "Edit" menu, or pressing the "Delete" key.

Opening

A hot link is opened by double clicking on it or selecting, and selecting "Open Hot link" in the "Edit" menu.
A Contact Hot link will open the Contact file. Quote/Invoice and Memo Hot links open the Contact file first and then select the original object in the history mode.
Note: Quick Quotes can not be opened but the Products and Bundles contained in them can.

Quick Quote

Quick Quotes are lists of Products and Bundles on a To Do Memo. A Quick Quote is created when you drag Products or Bundles from a Price List or Catalogue on to a To Do Memo.

Quick Quote Hot Link

Each line in the Quick Quote lists the quote entry's details. The Icon is taken from the source object. The quantity is displayed and used in calculations. The product code is shown if the user level and preferences allow it. The name of the entry and price are taken from the source Product or Bundle.
If no source document is open, the sell price will not appear for an entry. The price is not fixed like a normal Quote but linked directly to the source object. The Goods total is shown as a sum of all Quote entries in the Quick Quote. This is also only available when all source Price Lists or Catalogues are open and each source object can be found in these files.

Dragging a whole Quick Quote is done by clicking in the region outside the entry list but still inside the outer border.
Quick Quotes can be dragged on to Contacts to create a new Quote. This means that a Quick Quote can be used as an easy calculation area and then transferred to a Contact file for additional options and printing.
A To Do Memo containing a Quick Quote can also be dragged onto a Contact to create a new Quote. The text in the To Do Memo will be moved to the "Notes" field of the new Quote.

Adding Entries
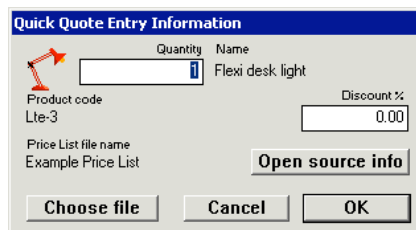
Additional Products or Bundles can be installed after the Quick Quote has been created, by dragging them on to the To Do Memo.

Deleting Entries

Quote entries can be deleted from a Quick Quote by selecting the entry in the list, selecting "Clear quote entry" in the "Edit" menu or pressing the "Delete" key.

Editing Entries

Editing Quote entries can be done by choosing an entry and selecting "Open quote entry" in the "Edit" menu or double clicking on a line.

Quick Quote entry info dialogue

Icon

The icon is displayed from the source Product or Bundle object.

Quantity

The quantity value associated with each Quote Entry is changed in this field.

Name

The name of the Quote Entry is taken from the source Product or Bundle.

Product code/Bundle code

The code that links this Quote Entry to the Product or Bundle.

Discount

A discount percentage for the selected quick quote entry can be set in this field.

Price List file name/Catalogue File name

The name of the source document that contains the Product or Bundle

Choose file

Click this button if you wish to change the source document of the selected quote

entry, i.e. Price List or Catalogue file.

Open source info

Click this button to open the information window for the source Product or Bundle.

Banner

About

Banners can be used to mark periods of several days with a message or theme, e.g. expos and training courses.

Creating

Banners are created by select "new banner" in the To Do menu. You will then be presented with the banner information dialogue.
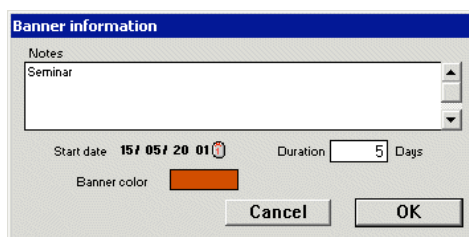
Banner information dialogue

Deleting

A banner can be deleted by selecting it in the To Do Month window and pressing the "delete" key or selecting "Clear banner" in the "Edit" menu.

Editing

Changes to banners are made using the banner information dialogue. This dialogue is opened by double clicking on a banner in the To Do Month window, or by selecting a banner and selecting "Edit banner" in the "Edit" menu.

To Do List window

About

The complete list of To Do memos can be viewed in this window.
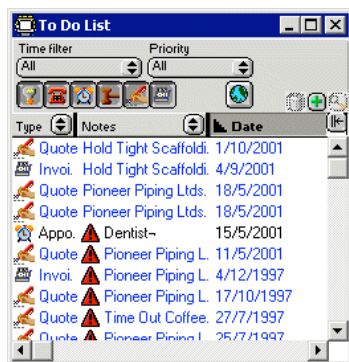
To Do List window

The top panel contains filters for the memos. If you only wish to see some of the memos, selections in this panel can remove the others.

Time filter

The period of time for the selection of memos can be chosen here. Those memos without a due date can be viewed with the "No due time" menu item.

Priority

The priority can be chosen here to show only those memos that match.

Types

The type of memos viewed can be selected here, by clicking buttons "on" or "off".

All choices

The "All choices" button [icon] shows all To Do Memos stored in the To Do List.

List

The list of To Do Memos included in this application are listed here. The contents and sorting of the list can be changed with the headings at the top of the list (See section "Display columns", chapter"Basics").

To Do Month window

About

To Do memos can be viewed in periods of single months using the Month window.
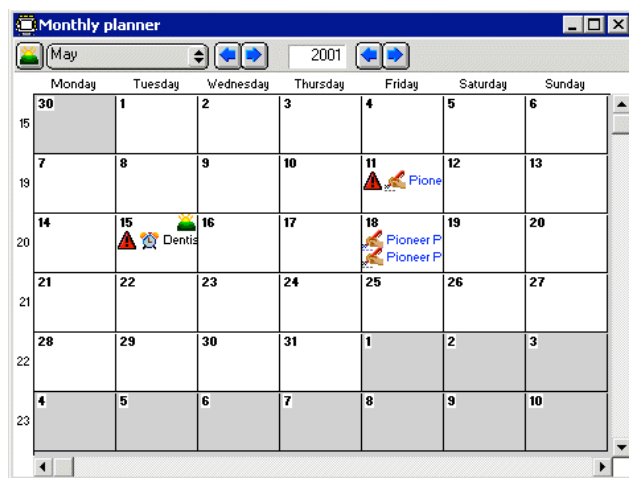
To Do Month window

The month being viewed is shown in the top panel. A pop up of months and also arrows allow selection of the month. The year can be changed by typing the desired year in the year field, or clicking on the arrows. The current month can always be shown by clicking on the "Now" button on the top left of the window.

The days of the week are displayed on the top. The starting day of each week can be changed in the preferences (See section "To Do", chapter "Preferences"). Days before and after the month being viewed are shown in a darker colour.

The memos displayed in the To Do Month window can have times displayed if you wish. This is a preference.

Scheduling

To Do Memos can be moved between days inside the month window by clicking and dragging them. This changes the due date of each memo as it is shifted. Auto To Do Memos can not be shifted in this manner.
An item such as a Contact or Quote dragged on to a day in this window will create a To Do Memo. This new memo will have the due date as the destination day. The default time of day for this new memo is set from the preferences.

Days

Double clicking on a day in the calendar, or selecting a day and selecting "Open day" in the "Edit" menu , will open the "To Do Day window".
Note: When selecting the day, be sure not to click on any of the To Do Memos in that day. The best way to do this is to click on the day number to select it.

Weeks

Week numbers are shown to the left of the month. Double clicking on these numbers will open the "To Do Week window".

To Do Week window

About

The To Do Week window acts in a similar way to the Month window.
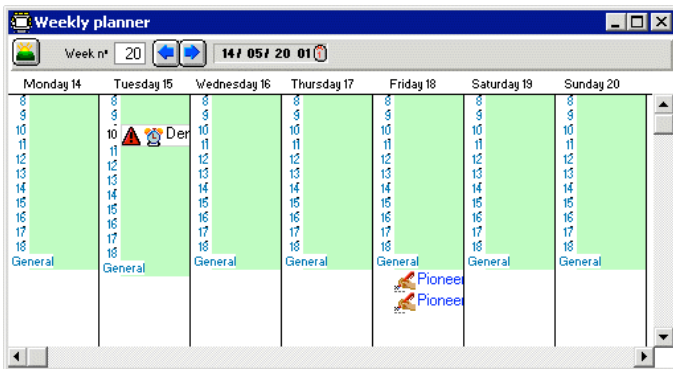
To Do Week window

The week being viewed is chosen in the top panel. A date can be chosen in the date field. The week including this date will then be shown.
The button to the left of the window, the "now" button will reset the selection to show the current week.
Hours of the day are shown as guidelines for scheduling. The start, end, interval times and week start day can be set as preferences (See section "To Do", chapter "Preferences").
You can double click on a day name to open the To Do Day window.

Scheduling

To Do Memos can be shifted within this window to reschedule them. As they are moved to different times of the day, or different days, the due date of the memo will change to match the time.

To Do Day window

About

The To Do Day window acts in a similar way to the Month window.
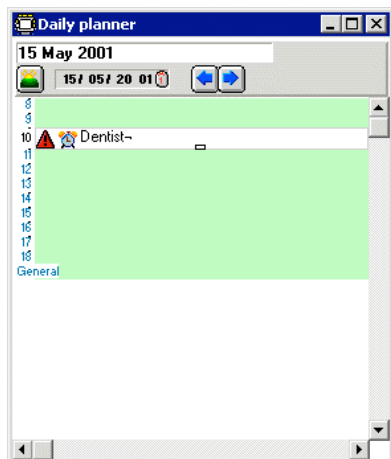
To Do Day window

The day being viewed is chosen in the top panel. The date field can be changed or the arrows can be used to select a different day.
The button to the left of the window, the "now" button will reset the selection to show today.
Hours of the day are shown as guidelines for scheduling. The start, end and interval times can be set as preferences (See section "To Do", chapter "Preferences").

Scheduling

To Do Memos can be shifted within this window to reschedule them. As they are moved to different times of the day, the due date of the memo will change to match the time.
The duration of each memo can be adjusted by dragging the tab at the bottom of

each to do memo's rectangle.
Objects such as Contacts and Quotes dragged on to times in this window will
create To Do Memos, with due dates set to the destination time.

Remote access

About

To Do Lists can be accessed by other users across a network. You can allow
these users to view information in your To Do List. This feature is useful for
example, if several people wish to organise a meeting together.

Access

The access privileges you allow other users for your To Do List file is set in the
"Access" dialogue. This dialogue is opened by selecting "Access" in any of the
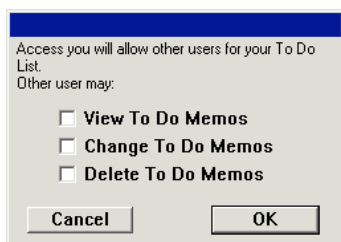"To Do" menus. You can only edit the access privileges for your own To Do List
or Message Centre.

To Do List access dialogue

Use the check boxes to determine what a remote user connecting to your To Do
List can do.
If you do not any access at all for other users then be sure to place your To Do
List file on your own disk and do not share its folder across the network.
When "View memos" is off, other users can only see the time placement of To
Do memos, not the actual content.
When you open another user's To Do List, you can view the access you have by
selecting "Access (R)..." in the "To Do (Remote)" menu. The access dialogue
will appear but you can't edit another user's access privileges.

Opening remote To Do Lists

To open another user's To Do List or Message Centre, select "Open..." in the
"File" menu in the normal manner. Locate the file on the network and click
"Open". Be sure that the other user has placed their To Do List or Message
Centre on a network shared disk.
Note: The other user does not need to close their To Do List file for you to access
it.
Once opened, the remote To Do List file's List window will be shown. The "To
Do (Remote)" menu will appear to help you open other windows.
You can drag To Do Memos between your own To Do List and a remote To Do
List. These changes will appear for the other user if they are currently running
SaleSmartz or when they next start the application.

Sending To Do Memos

You can send To Do Memos to other users on the network. This could be to relay
ideas or simply to record phone messages taken for another person.
To send a To Do Memo, first open its memo window, then click on the "Send To
Do", ⬛ button .

The "Send To Do memo" window will then appear. You can select a recipient
and then click "Send". Only those users that use the same "Shared resources" file
are available to send memos to in this way i.e. all SaleSmartz users must use the
same "Shared resources" file in a shared folder or server in a network.

Alternatively you can click on the button "Send to file...". When you click on
this button you can choose the To Do file or message centre belonging to another
user and click "Save". This file must be accessible in a shared disk in the
network.

A message will be automatically appended to the To Do Memo to confirm that it
has been sent. The receiver of the memo will automatically receive an appended
message to say who sent the memo and when.

Message Centres

Message Centres can be used to collect message if you are away from the office
or do not wish other users to see your To Do List file. It has the same
functionality and format as a To Do List file but its main function is to receive
memos.

If you place your Message Centre on a file server or other shared disk, users can

send messages to you and even check your schedule in this file.
As with your own To Do List file, you can set the access privileges in the Message Centre with the "Access (Centre)..." menu item in the "To Do (Msg Centre)" menu.

It is possible to have more than one Message Centre but only one is listed as the default. Others can be opened with the "Open" menu item in the "File" menu.
A preference can be set to automatically open your default Message Centre when you first start SaleSmartz. This can be used as a quick check to see if you have received messages while you weren't using your system.

CustomVariables

General

About

Custom Variables can be used to classify Contacts using your own criteria and crfeate your own custom fields. For example you may wish to group Contacts into Supplier and Customers. This chapter describes Custom Variables (or Classifications) for Contacts.
The Contact Profile mode in the Contact file window allows you to describe a Contact using these Variables (See section "Variables", chapter "Contact"). Custom Variables are not required for Contacts and this chapter can be skipped if you wish.

Hints

Setting a variable for multiple contacts

You can set a custom variable for multiple contacts by dragging a selection of contacts from a contact list window to a variable in the &quote;Custom variables window&quote;. This will prompt you to set a value for the new variable and them update and save the dragged contacts.

Removing a variable from all contacts
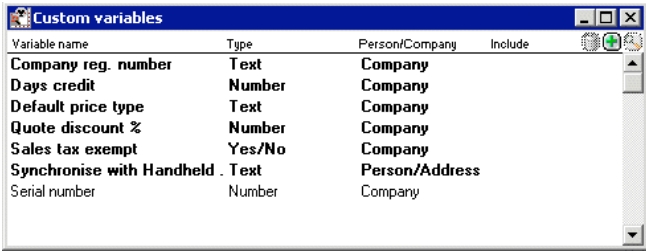
When you delete a custom variable, you will be asked if you want to delete it from all contacts.

My custom variables appear in italics in a contact

This means that the custom variable in the contact is no longer in the main custom variable list. If you click on the vairable in italics, you will be asked to add it to the main list, which will make it available for all contacts.

Custom variables

Window

Custom variables window

Creating

Custom Variables are stored in the file "Shared resources". This file's name and location are stored in the application preferences.

Opening

The Custom Variables window can be opened by selecting the "Show Custom Variables" from the "Windows" menu.
Note: If you no longer have access to the original Resources file (perhaps you have taken your computer away from a network) and you wish to use this functionality, create a new file and drag properties from Contact windows into this new document.

Deleting

The Shared Resources Document can be deleted by removing its file from the disk.

"Standard" Custom Variables

Several Custom Variables are supplied as "standard" and are always included in the Shared Resources Document. These properties can be recognised by a being displayed in bold. These properties are used by SaleSmartz to link additional information to a Contact.

These variables can only be deleted by the administrator user.

Company reg. number

This variable is used when contact information is exported to accounting applications.

Quote discount %

If this variable is assigned to a Contact, each quote created for the Contact will automatically have a whole quote discount assigned when the quote is created.

Sales tax exempt

This variable acts as a switch to turn off sales tax for items in quotes, and later invoices. It does not however alter the sales tax for invoices that are already created.
Note: For Australian systems, a further variable "Quoted sales tax" provides tax exemption and the ability to enter the quoted tax number for each Contact.

Default price type

If you have several price types, you can choose which type to use for certain Contacts by adding this Custom Variable to each Contact e.g. you could have retail or wholesale customers.

Days credit

This variable is used to automatically assign a payment due date for invoices.

Editing

About

Once a Custom Variables window has been opened, its properties can be edited.

Adding

Properties are added to a Shared Resources Document by selecting "New variable" in the "Edit" menu.
A dialogue will then appear allowing you to enter the details about the new variable (See the figure in the "Editing" section below).
Click "Save" to save the new variable to the Shared Resources Document .
Properties can also be added to a Shared Resources document by dragging Properties from Contact File windows.

Deleting

Properties can be deleted from the variable window by choosing a variable from the list and selecting the "Clear variable" menu item. Deletions are only saved when the document is saved.
Note: Contact files which use deleted Properties will still show these properties, but they will appear disabled in italic.

Editing

Properties are edited in a Custom Variable window by double clicking on a variable line. A dialogue will appear, allowing you to change the variable details. This dialogue also appears when you add a new variable.

Edit Variable dialogue

Variable name

The name of the variable can be entered in this field. Changes to this name will appear in all Contact files that use the variable, with this variable's code.

Per Company/Person

This option defines the variable as being associated with the whole company or one or more people within the company.

Include in new contacts

If you have properties that are used in all contacts then you can mark them as "Contact default" by checking this option "on". This means that all new contacts will have these properties included automatically.

Variable type

The type of value that will be attached to a variable can be changed by choosing a type button.

Yes/No

Properties with this type can only have two values, Yes and No, e.g. a variable called "Supplier" could have this type to indicate whether a Contact is a supplier or not.

Number

A number type can be used to describe items such as "Staff count". Numbers can be decimal values, either positive or negative.

Date

A date type can be used to store information about a Contact such as "First Contact" where you can record the date you first spoke to a Contact person.

Text

The text type can be used when you wish to store other information about a Contact. This can perhaps be a credit rating or a list of their interests.

Include in Calendar (Date)

For date type variables, you can choose to include the variable as a reminder in your To Do list with a link back to the contact.

Has a default value

If you want to assign an initial value to a variable, click on this check button. This will allow you to edit a default value which will be used whenever the Custom Variable is installed into a Contact file.

Has limits

If you wish to restrict the possible values for a variable, click on this check button. You can enter the limits in the field(s) below the button.
Once you have entered the details for a variable, click on "Save" to store the changes in the Shared Resources Document.

ImportingData

General

About

Price Lists and Contact Lists can be created or updated by importing data from text files. This chapter describes importing data for both of these lists.
This feature is useful if you are converting records from an old system or another software package you would like to exchange information with.

Contacts imported from a text file can be saved in Contact groups or as individual files in a folder called "Imported Contacts" in the application's folder. To break up the individual Contact files into smaller groups (as recommended for Contact List speed), sub folders will be created within the "Imported Contacts" folder, grouping the Contacts in name first letter groupings. The

"Contact nº" field is used to identify contact matches if the import is used to
update existing contacts.

Preparation

Before importing data into SaleSmartz you should prepare the import file. Open
the application you would like to export the data from. Save the required
information as a text format file. SaleSmartz is very flexible with the order of the
columns and the field delimiter character so these are not so critical.

A good test for the exported data is to try and import it into a spreadsheet or
word processor application. This will show you what the data looks like before
you import it into SaleSmartz.
Files from other computer systems can also be used if you have the correct file
conversion software. Again test the result with a word processor to see what the
data looks like. The text below shows how an imported file could look when
loaded into a word processor.

New Interiors Ltd.=>C-223=>James Chairson=>Mr=>Purchaser
John's joinery=>S-344=>John=>Mr=>Manager

This example shows what would become two Contacts, the "=>" represents a tab
character and the two lines are separated by a normal return character.
It is important that the file's field placement is consistent in each row in the file,
i.e. in the example above, the person's name always has two tab characters
before it, in each row.

Process

Selecting "Import..." in the "File" menu presents you with one of these
dialogues:
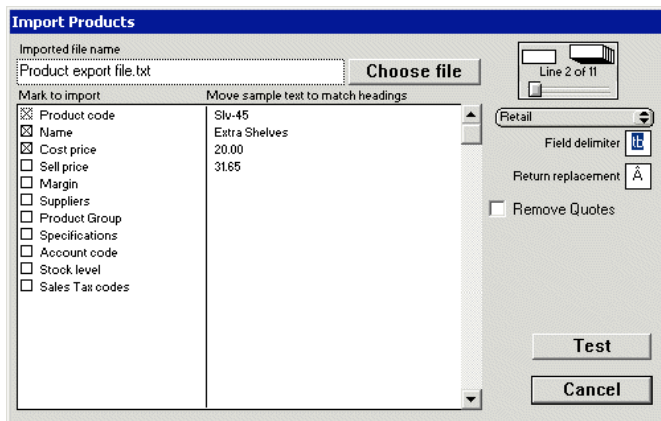
Importing Products from a text file.
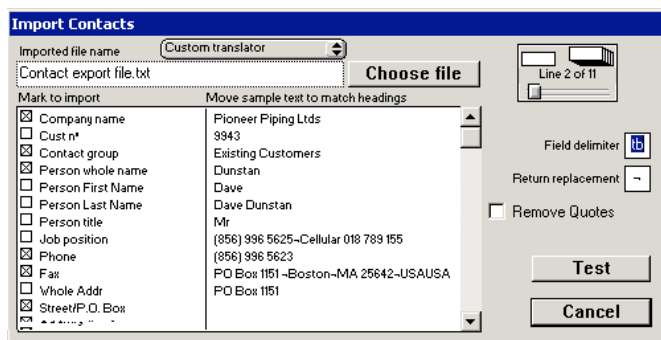
Importing Contacts from a text file.

Plug-ins

If you have translator files in the "Plug-ins" folder that are designed for import,
the popup menu "Custom translator" will appear above the button "Choose file".
This popup menu will otherwise be hidden.
If you have a compatible translator plug-in for your import file, the translator can
be chosen from the popup menu. If this is the case, you can follow the same
procedure as the next "Custom translator" section, but skip steps 1 to 7.

Importing
(Custom
translator)

To import data from a text file follow these steps.

1) The import file can be chosen by clicking on the button "Choose file". A
dialogue will appear to allow you to choose a text file.
Note: Only files of type text can be imported. Most spreadsheets and Word

processors allow the export of data in a text format. Files from other types of computer systems may also be imported if the System software allows it.
When chosen, the contents of each line of the file are displayed in the sample text field.
Note: Leading and trailing space characters will be removed from each of the file's fields.

2) Set the Field delimiter character. By default this is a tab. If the file has a different delimiter, click in the "Field delimiter" field and type the character. A Tab will appear as "tb" as in the example.
You will know when you have the correct character as the sample text will order itself into the correct rows.

3) Some files may have more than just a field delimiter and have quotes around each field, e.g. "Field1","Field2","Field3".
If this is the case then check the "Remove quotes" check box.

4) If some of the fields you import contain return (line end) characters, such as addresses, then these characters must be replaced before importing. A return character represents a new row, so fields with returns in will scramble the data. The character you have used to replace the return character can be entered into the "Return replacement" field to convert the imported data fields back to returns.

5) Drag the sample text on the right hand side of the sample field to match the columns on the left. The text will be rearranged and show the new order immediately.
Note: Contact import columns include two types of address. The first is called "Whole address". This can be used if the address occurs in a single field. The second is used if the address is split into separate fields. These are called "Address1, Address2... Align the parts of the imported address with these headings.

6) Different lines of the text file can then be viewed with the switcher to the right. Check that other lines have the same format.
Note: Product Groups will be created in the Price List if there is no group with a name matching exactly the group for the product being imported.

7) Check or uncheck the boxes on the left according to the data available. This restricts the import of data to only those that are checked on.
This is especially useful if you don't wish to import the names of existing Products because you have changed them.
Note: The product code is always imported and used as a reference. New products added to Price List will always contain Name and Retail price. Even if these are checked as off.
The company name field is also always imported for Contacts. Be sure to uncheck the address fields you don't wish to use, e.g. uncheck "Whole address" if you are using "Area", "Town" etc.

8) Once you have set the import format, click on the "Test" button. The import will be checked and a status dialogue will appear.
Import status dialogue.
The status dialogue provides a summary of the import action.

9) Errors (if any) can be viewed by clicking on the "Show errors" button. If there are a lot of errors the import order may be incorrect, click "Cancel" and rearrange the rows before trying again.
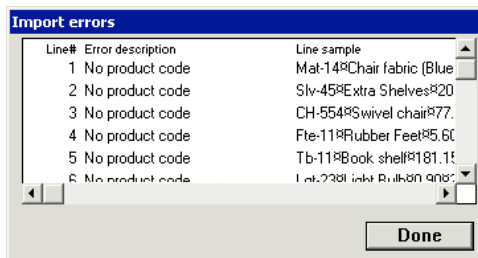
Product import errors dialogue.

Errors are shown referenced by line number in the left hand column. A description and then a sample of the text line is also shown. The highlighted part of the sample text indicates the position of the fault. Tab characters will be shown by the character "×" as in the example.

10) When you are happy with the result of the import, click on "Save" in the Import status dialogue. The new Products or Contacts will now be changed/added and then saved to disk.
Note: The import settings you have changed in this process will be saved in the Price List file for Price Lists and the "Contact List" file for Contacts. These will be kept for the next time you perform an import.

When a Price List text file is imported as an update, Products can be added if they don't already exist in the list.
If Products exist in the Price list and were not imported they can be obsolete. These Products will be shown in a dialogue after saving the imported list. They can then be deleted if you wish. Click and select the Product then click on the "Delete" button. This Product will then be deleted and the Price List saved.

Importing from Act!

**Versions older
than Act! 7.0**

If your version of Act!® is older than 7.0, you need to import the old database files into a Trial version of Act! 7.0 before proceeding with the steps below. Older Act! for Macintosh customers may need to upgrade to a more recent version before updating to Act! 7.0

**Importing Act!
Contacts**

An import Plugin is available to import contacts from Act! 7.0.
First you will need to export your data from Act!

1) Open Act!, then select "File" menu - "Export".

2) Choose the type of file to be "Text delimited" and press the "Browse" button to Select the file destination, then click "Next".

3) Select the "All records", if you want all contact records and then proceed clicking next.

4) When you get to the screen asking "Do you want to export field names?", click on "Yes, export field names"

5) Click next with the default screen values until the file is exported.

6) Open SaleSmartz and select "File" menu - "Import Contacts" and select the "Act! 7.0 Contacts" option in the Import type popup menu.

7) Click "Next" and follow the onscreen instructions to proceed with the import.

Note: The default field mappings may vary in Act! and the fields in SaleSmartz will be in the wrong place. To avoid this, download the default mappings file here (Unzip it) and click on "Load map" to load this file after step 5) above.

**Importing Act!
Notes/History**

An import Plugin is available to import notes and history from Act! 7.0.

You will need to create a report file from Act! to export the Notes and History entries.

1) Open Act!, then select "Reports" menu - "Notes/History".

2) In the dropdown, "Send the report output to", select "HTML File"

3) Click on the "All contacts" button

4) Click on each of the tabs (Note/History etc.) in the top of this window and select the "Date range" to "All". Also, click all option types you want to export, they are off by default.

5) Click OK and select where to save the file.

6) Open SaleSmartz and select "File" menu - "Import Contacts" and select the "Act! 7.0 Notes/History" option in the Import type popup menu.

7) Click "Next" and follow the onscreen instructions to proceed with the import.

Note: You should import Act! contacts before Notes/History. Notes/History are linked to contacts by Company name so you may have to merge contact details for duplicate entries if the contact has no company name.

ExportingData

General

About

Price Lists, Contact Lists, Reports, Quotes and Invoices can be exported to files which can be used by other applications. This process can be used in mail merge letters to customers or to view products in a spreadsheet. Refer to chapter "Report" for more information about exporting Reports.
If you have an accounting system, you can use exported files from SaleSmartz to update your system. SaleSmartz can use translator plug-in files to export data in a format that is compatible with many accounting systems. Translator plug-in files are installed with the "SaleSmartz Installer" disk, using the "Custom install" option.

Translators

About

Translator plug-ins are used to format exported data. SaleSmartz has a built-in translator called "Custom translator". Other translator plug-in files (for other applications) can be added to the "Plug-in" folder inside the main folder of SaleSmartz.

You can see which translator plug-ins are installed by looking at the "Export" menu item in the "File" menu whenever you are ready to export from a window of data. The "Export" menu item will have a sub menu (small triangle to the right, like the "Merge with" menu item) if any translator plug-ins are installed and this sub menu will contain a list of the translators that can be used.

If no translator plug-in files are installed, or installed incorrectly, The "Export" menu item will have no sub menu and only the "Custom translator" can be used.

User Parameters

Some translators may require additional export information which is not contained in SaleSmartz. This information may be account codes or other data. To change the user parameters for a Translator plug-in file, open this file by double clicking on its disk file. SaleSmartz can then open the file and allow you to edit the parameters for this translator file.

Custom translator

About

The custom translator is inbuilt into SaleSmartz. It allows you to export data to a text file in your own format.

Process

1) When you have a Price List, Contact List, Report, Quote or Invoice open, Select "Export..." in the "File" menu. A dialogue will then appear.
You can also click on the "Export" button in the "Find" dialogue when you have found Products or Contacts.
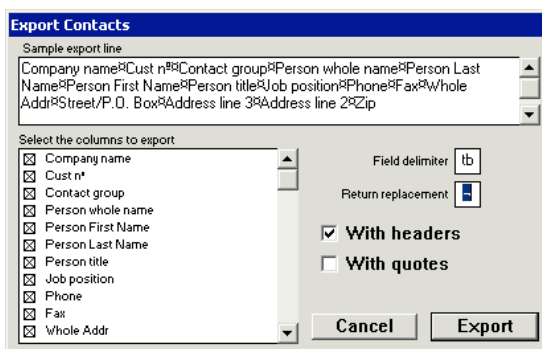
Export Contact dialogue

The Export Product, Report, Quote and Invoice dialogues appear and operate in a similar manner to this "Export Contact" dialogue, only the column names are different.

2) Choose the "Field delimiter" character by clicking in the box to the right of the "Field delimiter" text to select it and typing the character you wish to use. The delimiter is used to separate the exported columns and is usually a comma or tab character.
A "return" character will be used to separate each line.

3) The "Return replacement" character replaces any carriage return characters in an exported field. Without this, fields such as the Contact whole address would wrap around to another row and break the format of the exported file.

4) Click, the "Use headers" option if you wish to have the field name headers as the first line of the export. This can make it easier for another application to use the exported file.

5) If you wish to enclose each field with quote characters, click on the "Use quotes". This is only used if the application importing the new file requires it.

6) Click the small check boxes to the left of each column name to include that column in the export. A sample of the export text appearance will appear in the field at the top of the dialogue. The order you click the column check boxes "on" will define the order of the fields in the sample field.

7) Click on the "Export" button, name and save the new file. It will be saved in a "TEXT" file type which can be read by most word processor and spreadsheet applications.
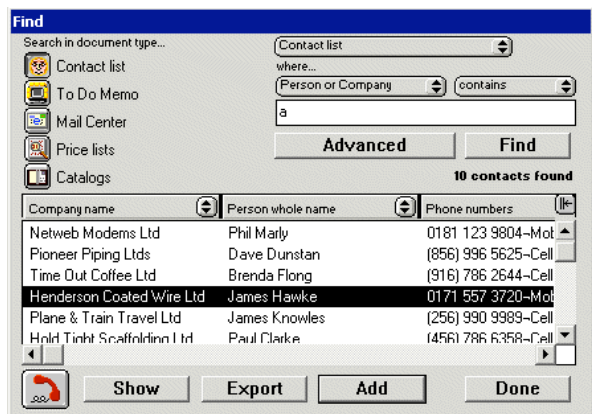
Finding

General

About

There are times when you may wish to quickly find a Contact or Product. A "find" dialogue is provided to help you do this.

Process

1) Select "Find..." in the "Edit" menu to show the "Find" dialogue.

Find dialogue

2) Click on one of the document type buttons to the left of the window to choose the type of item to search for.

3) This dialogue will only search documents of the chosen type. You may choose to search only one document by choosing the document's name in the pop up menu at the top left of the window.

4) Select the search subject and comparison in the pop up menus below the "where..." field.
These define the method used to find items in the chosen document(s).

5) Type in the search text in the editable field in the right of the window and click "Find".
A search will then be started and a list of any matching items will be shown in the scrolling field in the bottom of the window.

Dial

The dial button is enabled when you select contacts in the "Found items" list. Clicking on this button allows you to show the "Telephone" dialogue and quickly ring contacts (See chapter 5. "Basics").

Show

Selecting one or more of the lines in the found list field will allow you to "Show" these items by clicking on the "Show" button. This will close the dialogue and show the information windows for each of the selected lines.

Export

Clicking on the "Export" button will allow you to export the selected found lines to a text file (See chapter "Exporting Data").

Add

Items can be added to a document by selecting lines in the found field and clicking on the "Add" button.
The document used to receive the "added" items will be the top most (or current) window behind the find dialogue. If the current window can not have items of the chosen type added, the "Add" button will be disabled. Windows which can have items "Added" could be To Do Memos, Quotes or Catalogues.

Done

When you have completed your search, click on "Done" to close the dialogue.
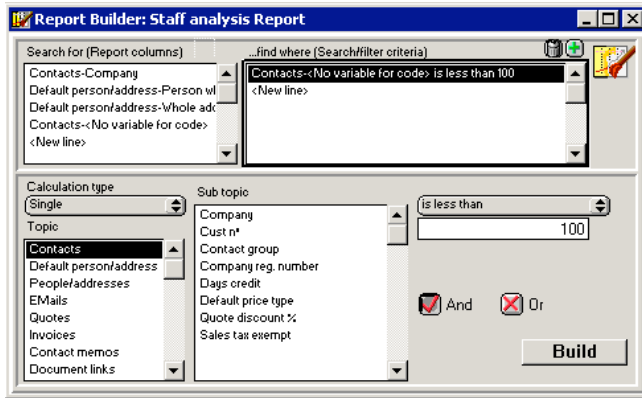
Report

General

About

The report module can be used to gather and analyse detailed information about Contacts.

It can be used to select Contacts with a particular interest or who live in a certain area. Entries in Quotes and Invoices are also accessible, e.g. a list of Contacts that have bought a particular Product in the last 6 months, can also be made.

Once this information is selected, it can then be viewed and/or exported as a file for use with other applications.

A Report is built from information relating to a Contact, their profile and history.

Window

Report Builder window

Search for

This field contains a list of information you wish to see.

...find where

The search criteria for the Report. Each line helps to define exactly what you are looking for.

Icon

The icon at the top right of the window acts as a drag handle, dragging this icon will drag a reference to this report, e.g. to a To Do Memo.

Other fields in the Report builder window are described later.

Creating

Select "New document" from the "File" menu and then choose the "Report Builder" document type.

Deleting

A Report builder file can be deleted by removing its file from disk.

Opening

A Report builder can be opened by opening its file on disk or from the "Show report" menu in the "Windows" menu.

Editing

Once created or opened, a Report Builder can be edited.

Search for

When building a report you should choose the information you are seeking in the "Search for" field. The order of the lines in this field is not critical, this can be changed in the finished report. Columns can also be removed later.

1) Click on "New line" in the "Search for" field and a new line will appear in this field.

2) Choose a calculation type in the "Calculation type " popup menu below this field. "Single" is the default and will allow all types of information to be gathered.

Other calculations such as "Total", "Average" etc. can only be used with numeric value information, such as "Goods total". All other information types will not be available for selection in the Sub-topic field.

These other calculations will provide a result for a summary of all of the selected sub topics, e.g. "Total Quotes-Goods total" will return a total of all Goods Totals from all Quotes that match the search criteria for each Contact .

3) Select a line in the "Topic" field. This selection will then allow sub topics to be selected.

Note: Default address will only return a single row for each Contact file, the Default address. On the other hand, if you use the "Addresses" topic, a new entry for each address you have stored in each Contact will be created. This can mean that several rows of information will be returned for each Contact file.

4) Select a line from the "Sub topic" field to the right of the main topics field.
This will complete this line for the search.
Note: Estimated. The sub topics which have "Estimated" in front of their name,
such as quote "Estimated goods total", are combinations of the Probability and
the Goods total for a Quote. The result is the probability multiplied by the goods
total, an estimate.

...find where

The "find where" field contains the criteria to isolate the information you are
looking for.
To edit this field, first click on it and follow the steps as per the "Search for"
field, then follow these additional steps.

5) Once the sub topic is chosen, the comparison type can be chosen in the popup
menu to the right of the window. This will define how the collected information
is compared to the value you enter.

6) Enter a comparison value in the area below this popup menu. The type of
selected information will determine how the value will be entered, e.g. a date sub
topic will show a date entry field for the value.

Repeat these steps until you have all the report information entered, then save
this Report Builder if you wish.

Build

Once you have created a Report Builder file, you can build a report by clicking
on the "Build" button. A Quick check is made to be sure all information is
entered correctly and then the report is started.
The first step in this process is to read the Contact List. It will be loaded if
necessary in order to continue. The Report Builder uses all of the Contacts in the
Contact List to search for information.

Contact files are loaded if necessary and scanned for the information needed.

A Report window will then appear and show the information that has been
gathered by this search.
The Report Builder can be saved and used again to create another report at a
later time if you wish.

Report

About

A Report is generated from a Report Builder. It will contain the rows of
information gathered by the Report Builder. The information in each Report is
fixed at the time it is created. Changes to other files, even the Report Builder
will not affect the information shown in the Report.

Report Window

Find items where...

This field contains the search criteria used in the original Report Builder.

Report Created

These fields show the date and time when the Report was created. These fields
are fixed and act as a reference only.

Icon

The icon at the top right of the window acts as a drag handle, dragging this icon
drags a reference to the Report.

Dial

The dial button allows you to use the telephone dialogue to automatically dial
the phone number(s) for the Contacts belonging to the selected rows.

Columns

Each column can show any of the "Search for" topics selected in the Report Builder. The order and content of the columns can be changed in the same manner as other lists (See section "Display columns", chapter "Basics").

Rows

Each row of returned information is also a link to its source contact file. To show the original item, double click on a row in the list. The Contact file window will be opened and if the row represents a Quote/Invoice or Contact Memo, this object will be selected in the Contact history mode.

Totals

Totals are automatically calculated for each numerical column. As mentioned before the values in each row are taken at the time the Report is generated. Later changes to files will not change row values in the Report.

Editing

Rows can be removed from a report if required. Select the row you would like to remove and select "Clear line" in the "Edit" menu.

Exporting

A Report can be exported as a text file. The export format is defined by the order and contents of each of the columns in the Report window.
Follow these steps to export a Report file.

1) Prepare the columns and order you wish to export. Add and remove columns if necessary (See section "Display Columns" in Chapter 5. "Basics").

2) Select "Export..." from the "File" menu.

3) You will then be presented with a dialogue to define the export format.
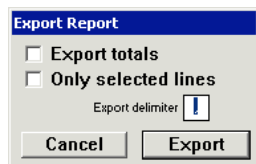
Export Report format dialogue

Select the options you wish to use. The Export delimiter will be used between each column of information. This will usually be a comma or tab character.

4) Click on the "Export" button, name and place the new file and click "Save".

The resulting file will be in a text format (See chapter "Exporting Data" for more information about text format files).

MailMerging

General

About

Contact files can be merged with word processor files to create documents such as faxes, letters or application forms. These documents will then contain information about the Contact that was used, i.e. name, address and phone number. Contact files can also be merged with Label Template files (See chapter "Label Template").

For merging Quotes and Invoices, see chapter "SZ Template".

Preparing

About

Before a Contact can be merged, the merge file must be prepared and placed in the "Merge templates" folder in the SaleSmartz folder. Label template files can be created and placed in this folder to become accessible.

Other document files used as templates for these merges can be created in most word processors which can save a document in the "RTF", Rich Text Format. Create the letter or fax etc. using your own fonts and styles, including tabs for layout positions. The easiest way to enter fields in a template is to copy them by selecting "Copy merge field names" in any of the SaleSmartz Contact menus, and then paste them into your word processor application .

The finished result could look like this:

```
<sz id="contact.Company name">
<sz id="contact.Street/PO Box">
<sz id="contact.Area">
<sz id="contact.Zip code"> <sz id="contact.Town">
<sz id="misc.Long Date">
```

Dear <sz id="contact.Person First Name">,

      I would like to announce a demonstration of our
new products.

Regards,
<sz id="myself.Name">

The resulting file after the Contact merge with "New Interiors Ltd." would then appear as this:

New Interiors Ltd.
1 Northern Avenue
Upper Richmond
Cambridge
12th April 1995

Dear James ,

      I would like to announce a demonstration of our
new products.

Regards,
Steve Salesperson

The resulting document can then be changed or re-formatted, as a new file is created from the merged information.

Template

Once you have designed your merge template file in your word processor, save it as "RTF" format into the "Merge templates" folder inside the SaleSmartz folder. Only the "RTF", "HTML" format and Label Templates can be used to merge documents.
Consult your Word processor's manual to find how to save a document in this format. Generally you would choose the menu item "Save as..." and then choose the "RTF" file format.

When SaleSmartz is started, it searches for merge templates in the "Merge templates" folder and adds them to the "Merge..." menu item in the "File" menu. This folder is also monitored for changes, and the menu will be updated for changes in the "Merge templates" folder while the application is running.

Merging

Once you have saved one or more merge templates in the "Merge templates" folder, you can then merge Contacts using these steps:

1) Select one or more Contacts by:

    a) opening a Contact file window. To choose a particular person or address type to use, show the address mode in the Contact file window and choose the desired address, otherwise the default address will be used.

    b) selecting one or more Contacts in the Contact List window.

3) Select the "Merge" menu item in the "File" menu and choose the file you wish to merge to.
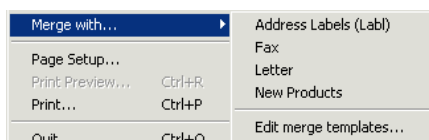
Merge menu

4) Merged Label Templates will simply be opened with the merged information. If the merge file is a word processor file, then you will then be show a dialogue to allow more options.
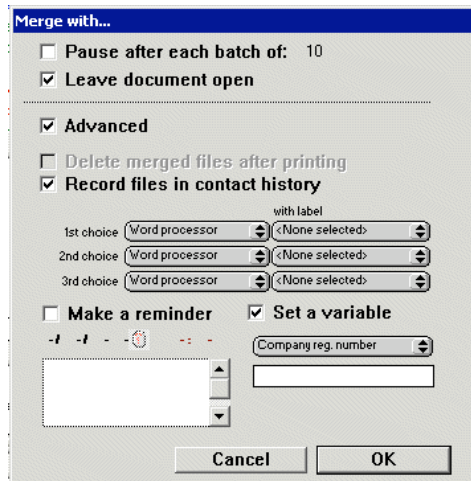
Merge with dialogue

If you click on the "Advanced" button you will be presented with several merge options.

Pause after each batch of

If you wish, you can print the documents in batches in case you have a problem with your printer.

Print and close each file

If this option is marked off, then each file will be opened and you will have to print each file yourself.

1st-3rd Choice

These options allow you to choose the method of merging files. The three popup menus contain a list of Plug-ins for mail merging.
If you were to choose the popups as in the picture, all contacts that had a fax number would receive a fax. If they had no fax number, they would receive an email. If they had neither, then a letter would be printed, optionally with an address label if selected.

Make a reminder

If you want to remind yourself to call the contacts who received this merged letter, then you can choose this option and create a reminder memo in the contact history for each contact.

Set a property

If you want to set a property for each of the merged contacts, then you can choose this option.
For Macintosh computers, the application used to open the new merged file should be the application you created the merge template with. If for some reason the word processor is not automatically opened, the default merge application can be set in the "Merge" section of the Preferences dialogue (See chapter 16. "Preferences"). This application will be used to open all files which have no known application type.

A newly created word processor file can also be automatically linked to the "Docs" section of the Contact for later reference, if the preference is set so.

LabelTemplate

General

About

A Label Template can be used to design and print labels on self adhesive label sheets. A Label Template consists of two viewing modes, one to design the layout of the label and page, and the other to show the list of text to be printed. Envelopes can also be printed using Label templates. You can treat an envelope as a single label, setting the "Labels across" and "Labels down" fields to 1. Switching between the two viewing modes is done by clicking on one of the two buttons to the top left of the Label Template window.
Each label can contain one or more fields. These fields are defined in the layout mode. Labels can be created manually by typing in text, or by dragging or merging a Contact to the Label

Template

You can also print standard labels that have fixed text (no Contact fields) e.g. Disk labels.

Creating

To create a new Label Template, select "New" from the "File" menu and then choose the "Label Template" document type.

Opening

A Label Template can be opened by either opening the file on disk or merging Contacts with a Label Template stored in the "Merge templates" folder (See chapter 21. "Mail merging"). Label Templates placed in the "Merge templates" folder will be visible in the "Merge with..." menu item in the "File" menu when a Contact is selected.

Layout mode

About

Once opened, a Label Template can be edited. As mentioned earlier, a Label Template consists of two viewing modes. The Layout mode is used to define the printed appearance of each label. Each label can contain text or pictures, such as logos etc.
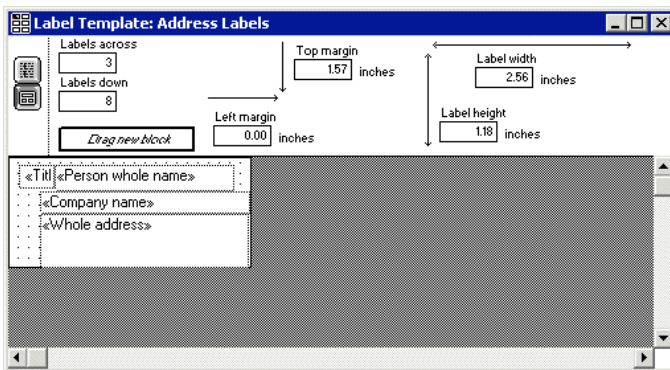
Label Template window, layout mode

Mode buttons

The two buttons to the upper left of the window allow you to switch between the two modes.

Labels across/Labels down

After you have chosen a sheet of labels to use, you can set the dimensions of this sheet in the fields at the top of the template window. The number of labels used, across and down can be entered into the fields of the same names.

Top margin/Left margin

These fields will define the distance between the top left corner of a sheet of labels and the top left corner of the first label. The actual measurement may vary depending on the printer you are using.
Note: Most printers will not print right to the very edge of a sheet of paper. If you have problems with a the edge labels being truncated, adjust the template layout blocks or set the left/top margins to start on the next label down/across so as to avoid using the edge labels.

Label width/Label height

These two fields define the dimension of each label. This dimension should actually be the distance from the left/top of a label to the left/top of the next label. This will account for any gaps between labels on the sheet.

Editing

The layout of each label is defined in the lower section of the layout mode. The size of this area represents a single label, defined by the width and height fields mentioned above.
Click on the label layout area, then choose "New template block" in the "Edit" menu to create a new block. Double click on a block to edit the content of it. The editing of template blocks is mentioned in detail in chapter 10. "Print Template", sections "Text block" and "Picture block".
Each field placed on the layout defined as "Preset" text (shown with «» characters around the text content), will appear as a field in the labels mode.

Labels mode

About

The labels mode of a Label template contains the text used as the content of the printed labels.
The two buttons in the upper left of the window will switch between the two modes of the Label Template.

Reuse labels

The grid at the top of the window is used to reuse label sheets. If you have already printed a few labels on a sheet, you can print more labels on the same sheet later by marking the labels which you have used.
Click on the grid in the places where labels have been used/removed and these positions will not be used when printing new labels. A grey rectangle indicates that a position will not be used. All of the labels will still be printed, but shifted down to account for the label stickers already used.
Click on the button to re-select all labels for printing.

Label Template, labels mode

As mentioned in the layout mode section, label field names are defined in the layout. The template blocks which are defined as "Preset" text, will appear here in the labels mode.
If you want to print identical labels (no Contact fields) then the text "no template blocks in layout" will appear instead of field names.
Creating

Labels can be created by:

1) selecting "New label" in the "Edit" menu. A new empty label will be created and selected. You can click and edit label text fields to the right of each field heading.

2) dragging a Contact from another window, e.g. from the Contact List window, from the Contact file window or from a Hot Link in a To Do Memo.

Deleting

Labels can be deleted by selecting one or more labels and typing "delete" or by selecting "Clear label" in the "Edit" menu.

Editing

The content of each field within a label can be changed by clicking on the field text area, to the right of the field name. Click once to highlight the field, and then again to edit the text. Multiple lines of text can be entered into each field, but be sure to allow for the height of these extra lines in the template block in the layout mode.
When you have finished editing a field, type tab, type enter or click elsewhere in the window to store the new text into the label's field.

Printing

About

Once completed, a Label Template can be printed by selecting "Print..." or "Print preview..." in the "File" menu. Selecting "Print preview" will show a preview window so you can see how the printed result will appear on paper.
If some labels are truncated in the preview or on paper, then adjust the margins to skip the labels which are not printed completely.
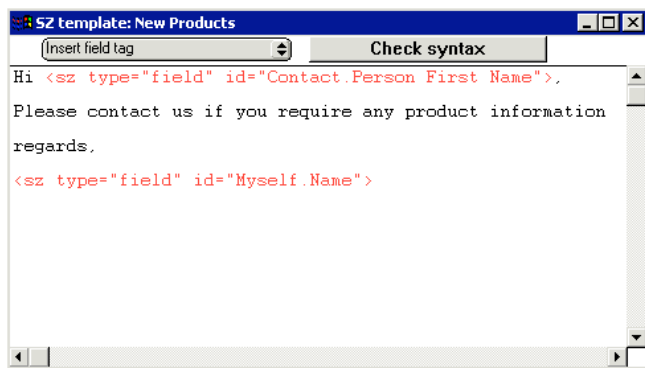
SZTemplate

General

About

SZ Templates are files used for printing or sending EMails, Faxes, Quotes, Invoices, Letters and exporting data.

They are very flexible but are also a little more advanced. For a less complex solution, you could use the Mail Merge features. (See chapter "Mail Merging").

In their simplest form, SZ templates are text files. Additonal fields can be added in the text of these files to insert text, such as a contact name or address. Using this process you can create an EMail template to respond to user requests or orders.

Window

SZ Template Window

Insert field tag

This Popup menu inserts the preset fields into your text. Click on this Popup and you can choose the category and type of field you want.

Check Syntax

This button checks the text in the SZ template to make sure it has no errors.

Creating

SZ templates are created by selecting "New..." from the "File" menu. Click on the SZ template icon and then click "OK".

Opening

SZ templates can be opened by choosing "Open..." from the "File" menu. They can also be opened from the "Merge with" window, if they have been placed inside the "Merge templates" folder. The Quote/Invoice "Print preview" window also offers an option to edit these templates.

Editing

Once the SZ template window has been opened, you can edit the text contained within. Preset fields can be added vie the "Insert field tag" popup menu. If the SZ template is being used for quotes or invoices, you don't need to same changes to the template in order to see the changes in the Print preview window.

Using

Mail/EMail/Fax merging

SZ templates can be merged with Contacts, Quotes or Invoices. You can save SZ templates in the "Merge templates" folder inside your SaleSmartz folder. This will add them the "Merge with" menu and then you can choose the new template to merge with contacts.

If you choose to merge to an EMail, choose "Merge with..." from the "File" menu when you have a contact selected or open. Then you can choose the EMail plug-in when you see the "Merge with..." window. Here you can also choose to leave the document open so that you can make any final changes before you send it.

Quote/Invoice /Order templates

SZ Templates will appear in the "Choose template" menu near the bottom of the "File" menu. This menu will appear when you have a quote or Invoice selected. You can then choose the SZ template and use "Print preview" as you would normally. You can save the quote as a file, or send as an email by choosing the option from the "Plug-in" menu in the "Print preview" window.

Structure

Attributes

The text contained in the template uses special "tags" starting with "<sz". These tags can be in several forms. Each tag generaly contains the words "type" and "id". These define the behavoir of the tag.

Type:

1) Field

The basic tag in an SZ template is the field tag. This is represented by the type "field". e.g. <sz type="field" id="Contact.Name">.

2) Loop

Loops are lines of text that repeat for object such as Quotes. You can list all of the items in a quote using loops. Thes is represented by the type "loopStart" or "loopEnd". e.g. <sz type="loopStart" id="Quote.Section">. Any text inside the loop will be repeated for each item.

IDs

The id part of a tag will determine what text replaces the tag when the template is processed. The ID will be in the form Object.Property, e.g. id="Contact.Name".

Width

The width attribute can be set for fields. This will set the width in characaters for the field. If the field text is less than the width value, extra spaces will be added to the field. The spaces will be added to left or right, or both, depending on the **Align** atrribute.

Align

The align attribute can be set for fields.This will determine which side of the field additonal spaces will be added to when setting the field width. This has no effect unless the **Width** attribute is used. The align value can be "left", "right", or "center". (Sorry about the spelling to our non-US customers, this is the same as HTML)

Output formats

The output format of a SZ template is very flexible. You can create text, html, rtf, xml and many other output files. SaleSmartz does not interpret the text around the tags, so this text can be in any format.

Quotes can be saved as HTML, TEXT or other formats, using the "Print to file..." option in the "Plug-in" popup menu, in the "Print preview" window. This allows you to save any quote that uses a SZ template to a file. This also allows you to send the quote as an EMail.

Quotes/Invoices

Quotes and invoices are more complex than Contacts because of their structure. Quotes can have many sections and many quote entries within each section. Because of this, quote fields are accessed using loops.

Properties relating to the quote iteself, such as description are accessed using the id="Quote.x" where x is the name of the property.

Within each quote, there can be one or more sections, just as it appears in the contact window. These sections must be placed inside a "Quote.Section" loop. Within each section there can be many quote entries. These must be placed inside a "Quote.Section.Quote Entry" loop.

e.g.

    <sz type="loopStart" id="Quote.Section">
    <sz type="field" id="Quote.Section.**Name**">

    <sz type="loopStart" id="Quote.Section.Quote entry">
    <sz type="field" id="Quote.Section.Quote entry.**Product
    code**"> <sz id="Quote.Section.Quote entry.**Description**">
    <sz type="loopEnd" id="Quote.Section.Quote entry">

    Total: <sz type="field" id="Quote.Section.**Goods total**">
    <sz type="loopEnd" id="Quote.Section">

This sample will produce a list of sections with all of the quote entries inside them. Each quote entry will display the product code and description.

i.e.

    Section 1 (Dining Room)

    PROD-1 Chair
    PROD-2 Table

Section 2 (Lounge)

PROD-1 Chair
PROD-3 Sofa

Total: 100.00

Examples

Examples of templates are available for download. You can download a Quote EMail template or a Quote HTML template. If a file save dialog doesn't open, choose "Save target as" when you click on these files (right mouse click on a PC) to save these links as files.

Note: You must save the resulting Quote merged HTML template with the .htm or .html suffix in order for it to be recognised by your computer.
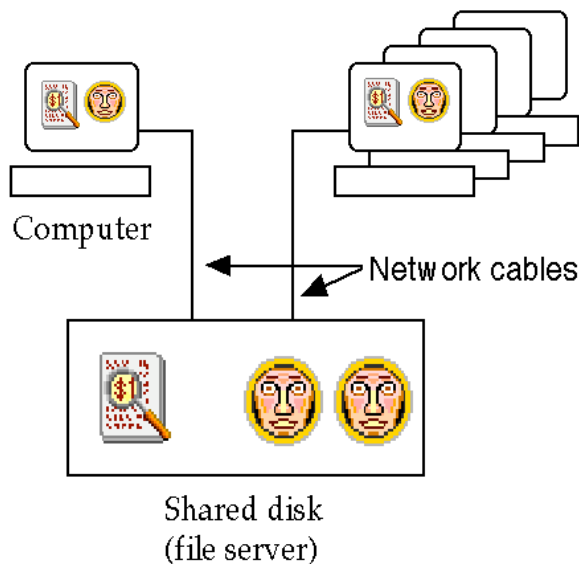
MultiUsers

General

About

The multi user functionality of several SaleSmartz files allows a single source document to be shared amongst all those who need it. This functionality is almost transparent. If you use a file in single-user situation then you will not notice a difference from any other normal file and do not need to read this chapter.
The shared nature of the multi-user files requires no additional software to run. The file must be accessible on some form of network for the computers wishing to use the file (See the operating manual for your computer).

Multi-users across a network

Files that can be shared and have multiple user access are: Price List, Contact, Contact Properties, To Do List, Print template, Catalogue and Message Centre. Be aware of the shared files if you use the SaleSmartz on a portable computer. A Catalogue for example needs a Price List to operate. Choose "Leaving the office" in the synchronisation menu before you disconnect from the network.

Technical

About

Changes made by one user will be reflected in the other users' instance of the multi-user file. If you are changing the same data at the same time as them, you will be notified.
For example, if you are editing a Contact information window at the same time as someone else. The other person then saves his/her changes to that Contact. When you try to save your copy, you will be notified with a dialogue that the Contact has changed while you were working on it.

> The address "Adrian Smith" has been changed in
> the file "Casino Supplies Ltd".
> Do you wish to open a new window to view the
> latest data
> or save it anyway?
>
> [Cancel]   [Save]   [**Open**]

Contact changed warning dialogue.

You are given three options:

Cancel

This will stop the action and leave the current window open with your changes untouched.

Save

This will write over the changes that were made by anyone else while you were working on this window. This is not the best option, but may need to be used in some cases. All changes made by others from the time you first opened this window will be lost.

Open

This action will open a second window for this object, beside the current window if possible. This is the best option. The latest changes for this Contact will be shown in this new window.
You can then compare the two, change the second and save it, or save the first if you wish. When you save one of these windows, the other will be closed automatically.
Note: A multi-user document continuously checks the disk file for updates. When it finds that the file has been updated, it will then update your version for you without disturbing any information you have changed or are working with.

Synchronization

General

About

When users are connected to a network they automatically receive updates and make changes to files they open from a central server.
If a user travels away from the main network (e.g. a salesperson visiting clients), they will have to take any required files with them. For example these files could be price lists and the contacts that he/she will visit.

If any changes are made to files while the user is away from the network, then these changes will have to be transferred back to the main server at a later stage. The file synchronization section of SaleSmartz allows the transfer of changes (in both directions) between files that originated from the same source file. For example, if a Salesperson visiting a client makes a quote for the client, while at the same time a person in the main office adds a contact memo to the server's copy of the same client file, then the two copies of the client file need to be synchronised.

Note: If you take files from a server and you intend to synchronise them at a later date, it is recommended that you perform an initial synchronization after they are copied to your own computer. This prepares files and so they "remember" the current state of the server files and helps to resolve changes better later.

Leaving the office/ Back in the office/ Update remotely with office

These menu options are used to simplify disconnecting and reconnecting to a network of computers.

Leaving the office

This option copies any files that you may need from the file server to your own computer so you can view and change them while you are away from the network.

Back in the office

This option will update the server files with the files you have changed while you are away from the network. Changes are updated both ways.
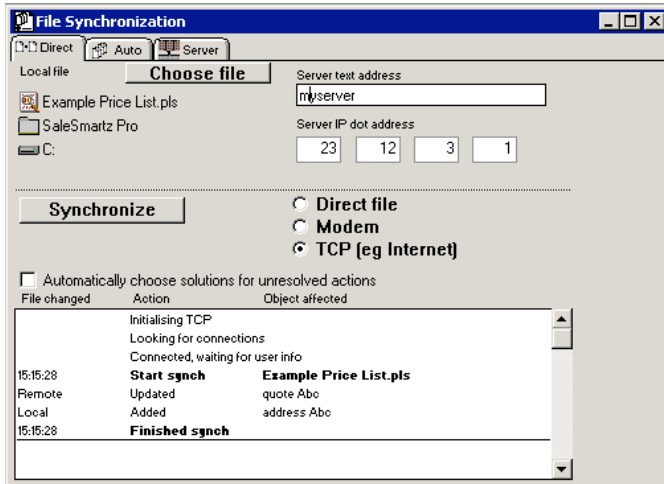
Update remotely

This option can allow you to update files while you are away from the network.

Advanced

The advanced option allows you to manually synchronise files

**Direct
synchronization**

The simplest form of file synchronization is "Direct synchronization". This allows a user to choose two files and synchronise them together automatically.
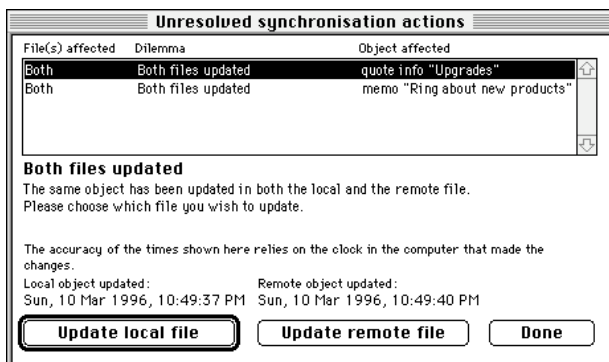

"Direct " file synchronization

The process of "Direct synchronization" is described here:

1) Open the local file you wish to synchronise, e.g. a contact file. This step can be skipped if you wish to choose the file after you open the "File synchronization" window.

2) Select "Synchronise" in the "File" menu.

3) The local file is already placed in the fields representing the local file in the "File synchronization" window. If you wish to choose another local file, click on the "Choose file" button beside the "Local file" label.

4) If the local file has been synchronised with a remote file before, then this remote file will be shown in the fields in the right of the window. If no remote file is shown or you wish to change it then click on the "Choose file" button beside the "Remote file" button. Generally the remote file will be the file on the file server.
If you wish to use TCP synchronization, click on the "TCP" button. TCP synchronization is described later in this chapter.

5) Click on the "Synchronise" button. The process of synchronization will be started and you will see a description of each action as the file is synchronised.

Unresolved actions

In some cases, an object may be changed in both the remote and local files. For example if a quote was updated in the office, while a salesperson updated the same quote in the field. When this happens a dialogue will appear to explain the situation and allow you to make the appropriate correction.

"Unresolved synchronization actions" dialogue.

**Auto
synchronization**

Auto synchronization allows you to synchronise groups of several files with remote files. For example if a salesperson travelled out of the office often, then they could keep a folder on their own hard disk containing the server's files they use, ready for auto synchronization. When they return to the office, they can use

auto synchronization to update both their own, and the server's files.

"Auto" file synchronization

The process of auto file synchronization is similar to direct file synchronization:

1) Each group of synchronised files is contained in a folder within the folder "Synchronization". The "Synchronization" is placed inside the main SaleSmartz folder. If this folder is not already there, a button called "Create" will appear in the top of the window. Clicking on this button will create the folder "Synchronization" and allow you to drag folders with files into the folder. You may have many different folders for auto synchronization, each of which can represent a different network or location.

2) Once a folder is selected in the Auto synchronization panel, you can select the remote folder to synchronise files with. This remote folder would normally be on a file server, and contain copies of all of the files you wish to synchronise. You can also choose TCP or Modem as the synchronization method, see the section later in this chapter.

3) Click on the "Synchronise" button and the process will be started. A record of actions will be shown, as in the "Direct synchronization" section.

Modem synchronization

You can use a modem to link two computers and synchronise via a phone line. Modem synchronization requires that a machine running SaleSmartz acts as a remote server, generally in the office network. Clicking on the "Start server" button in the "Server" section of the advanced "File synchronization" window starts the Modem server.

Modem setup panel

Once you have started the server, a user can connect remotely by entering the number to the server in the phone number field, changing the other settings to match those of the server and then clicking on the "Connect" button. The remote computer will then connect and synchronise files with the server.

TCP synchronization

SaleSmartz allows users to synchronise files using TCP. This will generally be using Internet, although other networks such as Localtalk and Ethernet can be used.
Note: Some Windows computers may not support SaleSmartz TCP synchronization, please contact EuroSmartz customer services for more information.
TCP synchronization allows users who are travelling, to connect to the main server in an office and synchronise files in much the same way as when they are connected to the office network.

TCP synchronization requires that a machine running SaleSmartz acts as a remote server, generally in the office network. Clicking on the "Start server" button in the "Server" section of the advanced "File synchronization" window starts the TCP server.

Both Direct and Auto synchronization have an option for TCP. To choose this option click on the "TCP" button in the right of the window. The TCP address fields will be shown.

TCP address panel

You can fill in either the text, or the dot address of the remote server.
When a SaleSmartz TCP server is started, it will show its dot address and, if available its text address in the "Server" panel.
Note: On some internet connections, both the server dot and text address change each time the computer connects to internet. Please contact your internet provider for more information. If the address changes for each connection, the person connecting to the server will have to be told the current server address, shown in the "server" panel.

This is the process for TCP synchronization:

Server

1) Connect the server computer (usually in the office) to the TCP network (e.g. for internet, you could use SLIP or PPP).

2) Open the "File synchronization" window, click on the server icon to the left of the window. Click "Start server" to start the SaleSmartz server.
Note: Although the synchronization process is automatic, a user should be near

the server, to answer possible queries from the remote users computer e.g. if the server can't find a file.

Remote user

3) The remote user also connects to the TCP network in the same way as the server.

4) Choose Direct or Auto synchronization in the same way as for a normal direct file synchronization. Click on the "TCP" button to show the TCP address fields.

5) Type in the server's text or dot address (contacting the user running the server to get the address if necessary), and click "Synchronise".
Both the server and the remote computer will disconnect from TCP when finished. The connection to Internet or other network will not be affected, you will have to disconnect this link yourself.

Palm Sync

About

Palm synchronization is an add-in module which provides synchronization between SaleSmartz Contacts/Date Events, and a Palm Pilot database.
This synchronization is a **Full** 2 way synchronization and updates/adds/deletes records 2 ways, with confirmation if required.

You will need to download and install the SaleSmartz Palm Conduit

Installation

Windows

1) Download and run the SaleSmartz Conduit Installer for Windows here: <u>v5.0</u> or <u>v4.3</u>.
 This will install the Palm conduit "SaleSmartz Conduit.dll" in your Palm directory.

If you have any problems, make sure you have downloaded and installed the latest Palm Desktop software <u>here</u>

Macintosh

1) Download the SaleSmartz Conduit for Macintosh: <u>v5.0</u>, <u>v4.3</u> or <u>v4.3 Classic</u>
2) Unstuff the downloaded file, and place the "SaleSmartz Conduit" file in your "Conduits" folder inside your Palm application folder.
For **OS8-9**, the conduits folder is in your Palm application folder, eg. *Macintosh HD*/Palm/Conduits
For **OSX**, the conduits folder is generally in /Library/Application Support/Palm HotSync/Conduits

3) Use the Palm software "HotSync Manager" to set up the SaleSmartz Conduit

Synchronization

The SaleSmartz conduit synchronizes like the other standard conduits, except you will need to have SaleSmartz running and in Sync server mode.
Make sure you have set the Palm preferences in the menu Windows - Preferences.
Note: If a record has changed on both the SaleSmartz and the Palm database, then a duplicate will be made on each database. This does not relate to non Palm items such as Quotes etc.
It is recommended that you back up both your Palm and SaleSmartz before your initial synchronization.

1) Start SaleSmartz, choose menu "File" - "Synchronization" - "Advanced"
2) Click on the "Server" tab and click "Start Server"
3) Press the sync button on your Palm Pilot to start the synchronization. You should see the connection being made to the synchronization server, and the events being logged.

Contacts

The SaleSmartz Conduit will synchronize Contacts and their fields with the Palm database.
As there can be several addresses per SaleSmartz contact, these will be split to fit on the Palm, and reassembled back to SaleSmartz for updates.

Each category on the Palm relates to a Contact group in SaleSmartz.
If there are no contact group files matching the Categories on the Palm, new ones will be made.

This section will be enhanced so that specific Contacts can be "tagged" inside a larger group so that you can specify the records to be synchronized with a custom variable.

Date Events

The SaleSmartz Conduit will synchronize Date Dependant To Dos with the Palm database.
You can choose to synchronize Auto To Dos (blue) with the Menu Window - Preferences - Palm preferences.
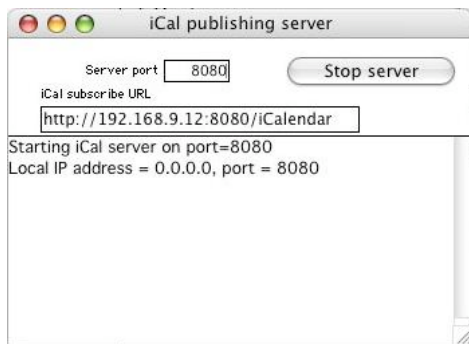
iCal Sync

About

The iCal sync module in SaleSmartz will allow you to share your Calendar events with the OS X iCal application. You can either use the SaleSmartz iCal server to publish your Calendar, or use the export file format to save your SaleSmartz Calendar to a file for importing into iCal.

iCal Server

The SaleSmartz iCal server will allow you to publish the SaleSmartz Calendar for your iCal application.
This can allow a PC or Mac OS X user to publish their SaleSmartz Calendar and access it over the internet, or simply on the same OS X computer.
To activate the server, select the "File" menu - "Synchronization" - "iCal synchronization".

iCal synchronization server window

You may have to change the port number if your computer is already using the port for another process and you receive an error.
You could try a number greater than 10000 to have a better chance of not conflicting. Check with your network administrator for more info.

Click on the "Start server" button and you will see the status in the log field below. You will see any errors there.

Once successfully started, the iCal URL field will be displayed. You can copy this URL and use it in your iCal application. Check with the documentation in iCal to see how you can subscribe to an iCal server.

iCal export file

You can export your Calendar to an iCal export file. When viewing a To Do window, (Monthly, Daily, Single To Do etc.) you can select from the menu "File" - "Export To Do" - "iCal".
You will then be asked to save the file and it will then be exported.

Check with yout iCal documentation to see how to import this file.

Preferences

General

About

The functionality in SaleSmartz can be customised to better suit your requirements by using these preferences.
To activate the Preferences dialogue, select "Preferences" in the "Windows" menu. There are different modes for this dialogue. If the current window is related to a mode then the preferences will show this mode by default, e.g. opening the preferences while a Contact file window is selected will switch to "Contact" mode of the dialogue.
Preferences are stored in a file called "SaleSmartz preferences" and stored in the computer's "Preferences" folder on a Macintosh or in the SaleSmartz folder on Windows systems.
The following descriptions of each mode in the preferences also show the "default" settings in each mode.

General mode

The general mode contains settings for the whole application.
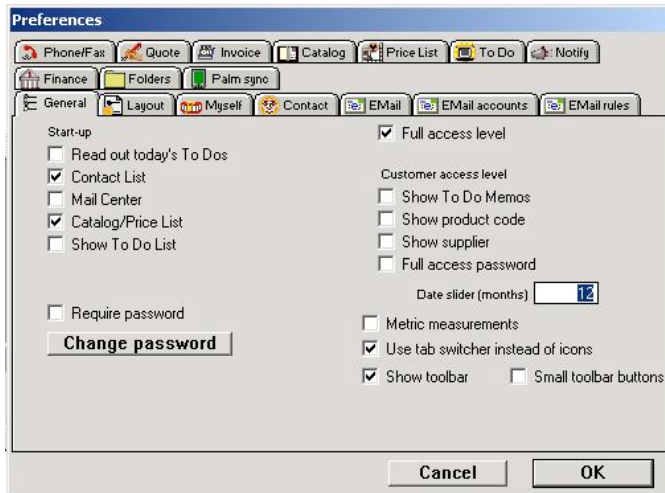
General mode

Start-up

The actions taken when SaleSmartz is launched are listed here.

Read out today's To Dos

This option is only for computers with a supported voice/speech synthesizer. This will read out the To Do memos for the day when you start SaleSmartz.

Contact List

Choosing this option will open the Contact List window every time SaleSmartz is launched.
This option also scans the disk(s) for Contact files and Automatic To Do Memos. Your To Do List will then contain the latest Quote/Invoice and Memo warning memos. This is setting is recommended for a network based system, as other users can change Contact files without updating your own To Do List.

Mail Centre

Choosing this option will automatically open your default Mail Centre.

Catalogue/Price List

This option will open the default Catalogue or Price List window if you have set one.

Full access level

Without this option the user level at start-up will be the Customer level, with the appropriate restrictions (See Access level in chapter 5. "Basics").

Require password/Change password

If you choose this option, access to SaleSmartz and your data will be denied at start-up until you type in a password, for added security.
Note: When SaleSmartz is first installed, your password will be empty. If you are asked for your password before you have changed it, simply leave the password field empty.
Click on "Change password" to enter a new password. You will be asked to enter the old password followed by the new one and then a confirmation of the new password. There is no password installed in SaleSmartz after you install it so leave the "Old password" field empty.

Customer access level

The customer access level is used when you wish to show a customer your Product Catalogue in SaleSmartz. Information viewing is restricted in this level. The options here can determine which additional features are disabled.

Show To Do Memos

Warnings for To Do memos can be suspended while the user level is set to Customer level. The content of To Do Memos is also hidden as is are all open To Do Memo windows.

Show Product codes

When the customer user level is chosen (not Full access), Product codes can be hidden if this check box is not selected.
Require password for full access
When you wish to switch back to full access level, you will be asked for a password first. This is to prevent a customer from viewing data while you are not in front of the computer.

Show supplier

As with the Product codes, Suppliers can also be hidden from the customers by unchecking this check box.

Metric measurements

Check this option if you wish to use metric units (millimetres etc.), otherwise inches will be used. This preference is used in the Label Template window.

Date slider (months)

Throughout SaleSmartz, dates can be changed with a slider as seen below. The maximum range of this slider can be set by changing this field.
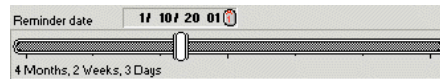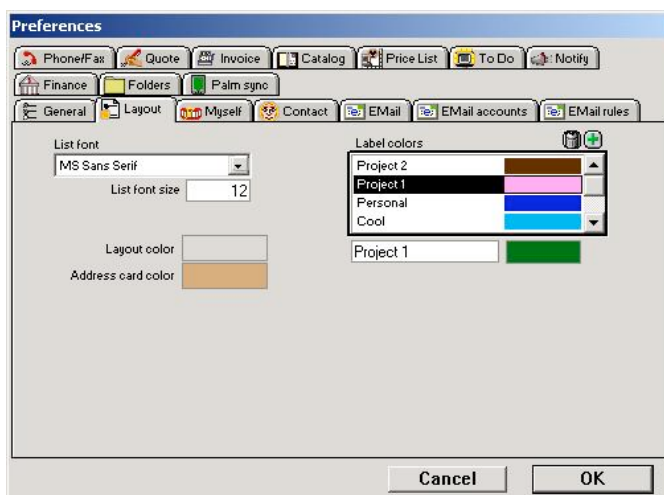

Date slider

Show utilities bar

This option shows the tool bar with shortcut buttons.

Layout mode

The layout mode contains layout settings for the whole application.

Layout mode

List font, List font size

The default font and size used for most lists is defined in this popup and field.

Layout color

This is the color that gets used for most windows.

Address card color

This is the color that is used to display contact address cards.

Label colors

You can specify category names and colors for contacts and eMails here.

Myself

The information describing the user of the Application is stored here.

Myself mode

This information is used in Quotes and Invoices when printing and is selected from a Print Template (See chapter "Print Template").
Each of these fields is free text and can be filled with information that you need.

My Code

The code field can contain a reference for the customer, such as tax or salesperson number.

Sales Commission

The sales commission figure defines the revenue you gain as a salesperson. This figure is used in the "Profit mode" of Quotes and Invoices to indicate the revenue on these items. A figure of "0" will mean that this value is ignored.

Contact

The Contact mode shows the settings for Contacts and mail merging.

Contact mode

Show history beside address

This option will display the contact history for a contact beside the address details in the address mode, so that you don't have to click on the "History" mode icon in the left of the window to view contact history.

Show Custom variables in address mode

This option will display contact properties for a contact in the first (address) mode of a contact window, so that you don't have to click on the "Profile" mode icon in the left of the window to view properties.

Post code after town/state as default

The post code in a Contact's address can be placed either before or after the town/state. This is useful for international Contacts. The position of the post code for new and imported Contacts can be set here. Once a Contact is opened, an individual preference can be set in the "Contact file" menu.

The post code field is not required for a Contact's address.

Job title must be in list of choices

This option relates to the job title field of a contact window. With this option "on", the text must be in the list, or be added to the list.

New Contact duplicate check on...

These options will check all new contacts to see if any of these fields match existing contacts. This avoids duplicattion in your database.

Link merged files to Contact

After the new merged file has been saved it can be automatically linked to the "Docs" section of the Contact, by checking this button.

Full contact memo details

This option displays more options when viewing a contact memo, such as memo type, incoming, outgoing etc.

Show contact memo created date

This option will display a date field for a contact memo to show the date the memo was created.

New contact memos marked as done

This option will set the "Done" button for new contact memos so that they are either reminders or history records, by default.

Postcode lookup

This option is available if you have postcode Plug-in software for doing searches on postcodes ad filling in the address fields accordingly.
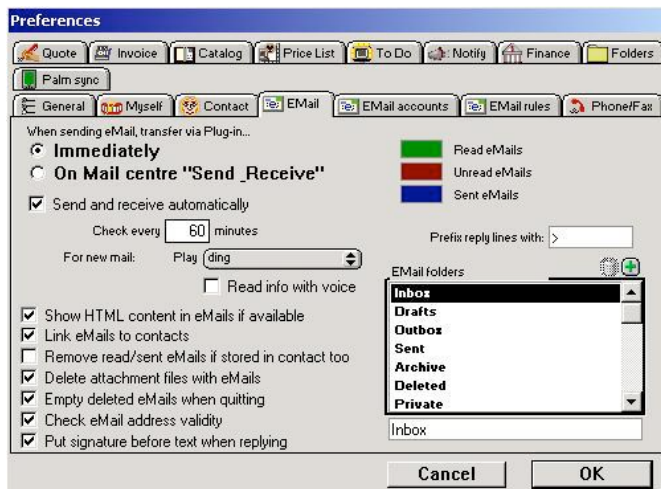
Auto fill Cust No

This option will create a new customer number for all new contacts.

Verify contact list with server

Unchecking this option will stop checking the server for contact group file changes. You can use this if you have a very slow network connection

---

EMail

The eMail mode shows the settings for eMails and the Mail Centre.

eMail mode

When sending eMail, transfer via plug-in...

This sets the option when to send your eMails to your eMail application. You can queue your mails by choosing **On "Mail centre" Send & receive**.This will store mails in your Mail Centre "Outbox" until you synchronise with your mail application.

Send and Receive automatically

This option will automatically synchronise your eMails with your external eMail application when you are not using your computer. This ensures your Mail Centre is up to date.

> **Check every**
>
> Enter the minutes delay between each check
>
> **For new mail:**
>
> You can also choose to notify you if an eMail arrives when you are not using your computer. This can be in two possible ways:
>
> **Play**
>
> This will play a sound for any new messages
>
> **Read info with voice**

If you have a compatible voice synthesizer, this option will make SaleSmartz read out the "From" address and the Subject of any new mails.

Show HTML content in eMails if available.

This option will show formatted HTML text in any eMails if they have any, and your computer supports this display.

Link eMails to contacts.

This option will link all incoming and outgoing eMails to any contact that matches the to or from eMail address. This helps to keep track of contact eMails by showing them in the contact history.

Remove read/sent eMails if stored in contact too

This option will remove any eMails that you have read, which have been linked to a contact. This clears out your inbox of read mails as the mails can always be found in the contact hsitory.

Delete attached files with eMails

This option will delete attachments from the "eMail attachments" folder when you delete the associated eMail, removing unlinked files.

Empty deleted eMails when quitting

This option will delete any eMails in the "Trash" folder of the Mail Centre, when the Mail Centre window is closed.

Check eMail address validity

Override the validity check for eMail addresses.

Put signature before text when replying

Determines if the signature for an eMail account will go before or after the reply message.

eMail colours

These colour panels allow you to choose the colours of different eMail types.

Prefix reply with

This field can contain text to place before each line of the original text when you reply to a mail. This allows you to see the differemce in the text content.

EMail folders

Here you can change the name of the eMail folders in the Mail Centre. You can also add new custom name folders.

EMail accounts

The eMail accounts mode shows the accounts used for sending and receiving eMail.
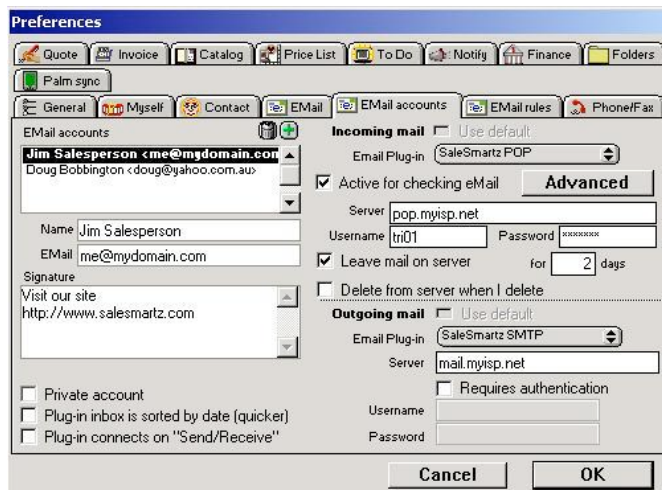
eMail accounts mode

EMail accounts

This field contains a list of all eMail accounts. These will appear in a popup menu for new eMails so you can set the "From" address of your mails. Click on an account to edit it, or use the editing buttons in the top right of this list to add and remove accounts.
Each account may have a different plugin for incoming and outgoing mail, or simply use the default account (shown in bold in the list).

Name

This can store your name or description of the address.

EMail

This stores the "From" eMail address.

Signature

This stores any signature text wich you want to place at the bottom of your eMails. This can be your company text or website etc.

Private account

Makes sure sent and received eMails are stored in your own private folder in the Mail Center. Other users can't access this folder.

Mail application Inbox is sorted by date (quicker)

Use this option if your external mail application has it's inbox sorted by date. If it isn't sorted by date, some messages won't be imported if you use this option. If you have this problem, don't use this option.

Plugin connects on "Send & Receive"

Some external plugins may support this option to connect to the mail server when synchronizing.

Incoming mail

These settings are for receiving the eMail for the selected account.

Default

If this is not the default account (first in the list, in bold) then you can check the "Default" option to use the default account plugin options.

EMail plug-in

Select the plugin to use for the incoming eMail for this account, if you don't use the default.
The SaleSmartz POP/IMAP plugins are recommended as they don't require an external application.

For the SaleSmartz plugins:

Server

This field contains the name of your POP/IMAP email server. Check with your ISP.

Username/Password

These fields contain the credentials to log in to your email server. Check with your ISP.

Leave mail on server for ...

Check this option if you want your eMail to remain on the server so other applications can access it.
You can define how long it is kept in the for-days field.

Delete from server when I delete

Check this option to remove mail from the server when you delete it from within SaleSmartz. This won't happen until you empty your Deleted folder

Outgoing mail

These settings are for sending eMail for the selected account.

Default

If this is not the default account (first in the list, in bold) then you can check the "Default" option to use the default account plugin options.

EMail plug-in

Select the plugin to use for sending eMail for this account, if you don't use the default.
The SaleSmartz SMTP plugin are recommended as they don't require an external application.

For the SaleSmartz SMTP plugin:

Server

This field contains the name of your smtp email server. Check with your ISP.
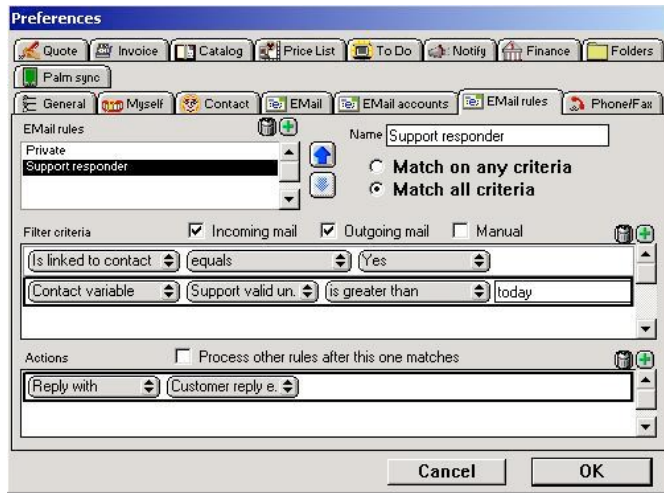
Requires authentication.

Check this option if your outgoing server requires a username/password.

Username/Password

These fields contain the credentials to log in to your email server. Check with your ISP.

EMail rules

The eMail rules mode shows the rules used to perform actions on eMails.

eMail rules mode

EMail rules

This field contains a list of all eMail rules. Add new rules with the add button in the top right of this field.

Move up/down

The two arrows to the right of the rule list will change the order of the rules by moving the selected rule up or down in the list.

Name

Enter your own name for the selected rule

Match on any criteria

This option will make all the criteria "OR" related so any matches will cause the actions to be performed.

Match on all criteria

This option will make all the criteria "AND" related so all criteria must match to cause the actions to be performed.

Incomimg mail

Check this option to apply the selected rule to all incoming mail.

Outgoing mail

Check this option to apply the selected rule to all mail sent.

Manual

Check this option to run the selected rule when the manual rul option is slected from the "Mail Center" menu.

Filter criteria

A list of criteria that filters eMails. Use the add and delete buttons in the top right to edit the list. Use the popup menus to select different criteria.

Process other rules after this one matches

This option will allow other rules to process an eMail after the eMail matches this rule.

Actions

A list of action to perform on matching eMails. Use the add and delete buttons in the top right to edit the list. Use the popup menus to select different actions.

Phone/Fax

The Phone/Fax mode shows the settings for automatic phone dialling and caller display (incoming call recognition).
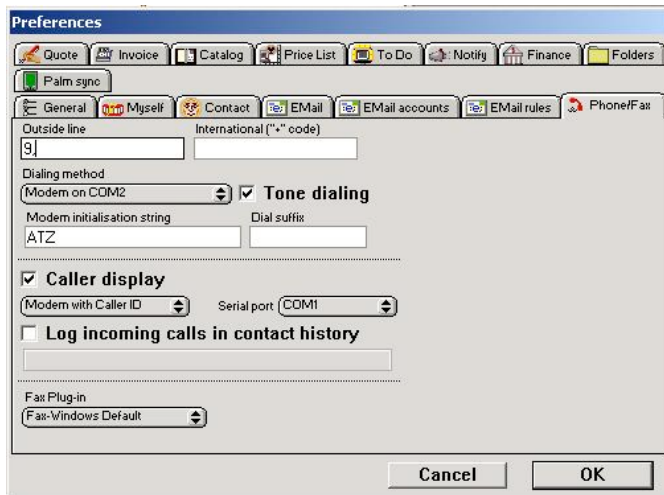
Phone mode

Note: The speaker dialling method may not be available on Windows systems.

Outside line/International ("+" code)

These fields can be used if you require extra prefix codes for phone numbers. When you put a "+" in front of a phone number, the international code will be used as a dialling prefix for the phone number.

Dialling method

You can choose to dial using a modem, if you have one connected, or using the speaker in your computer. If you use the speaker method then you should hold the microphone of your phone to the speaker when dialling, you may need to adjust the volume of the speaker using the popup menu to get better results.
Note: The speaker dialling method only works for phones with tone dialling capability.

If you choose the modem dialling method then you can choose the modem's port in the "Serial port" popup, and initialisation string.

The "Dial suffix" field is used if you wish to add a modem command to the end of the dial command string.

Caller display

If you have an appropriate caller device connected to your computer, SaleSmartz can be configured to display an incoming caller's Contact file window as the phone rings.
If you have plug-in files for Caller display devices, these plug-ins will appear in the popup menu to the right of the "Caller display" button allowing you to choose the settings defined in the plug-in file.
If you wish, the popup menus allow you to configure the serial port that the caller device is connected to. The prefix and suffix fields define the strings sent by the device to enclose the phone number.

Log incomng calls in contact history

This option is for caller display and will record all incoming call events in the appropriate contact history.

Fax plugin

You can select the plugin for your fax software if it is installed. This is used for mail merging and quote/invoice template printing.

Quote

The Quote mode shows the settings for Quotes and template printing.
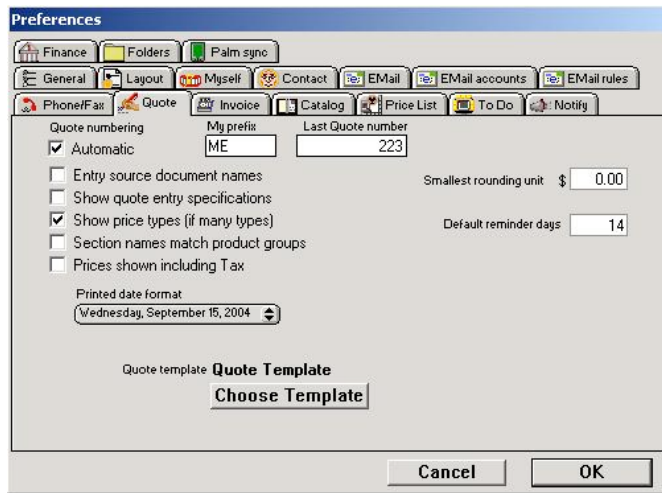
Quote mode

Quote numbering

This option automatically creates quote numbers for new quotes. You can set the prefix and starting point with the fields beside this option.

Entry source document names

This shows the source file (Price List or Catalogue) file name for each quote entry object.

Show quote entry specifications

This option will automatically show specifications for all new quote entries installed into quotes.

Show price types

If you have more than one price type, then this setting will show each quote entry's price type in the contents mode of Quotes.

Section names match product groups

This option will create a new section to match the name of the product group that new products may have.

Prices shown include Sales tax

This option will show the quote entry prices in the quote, inclusive of sales tax.

Printed date format

When a date field is printed from a Quote or Invoice, its format can be set here. Date fields can be items such as today's date, due date or validity date.

Smallest rounding unit.

If you do not wish to show small currency units in quotes, you can set the rounding value in this field. This field will contain the minimum unit for rounding up or down.
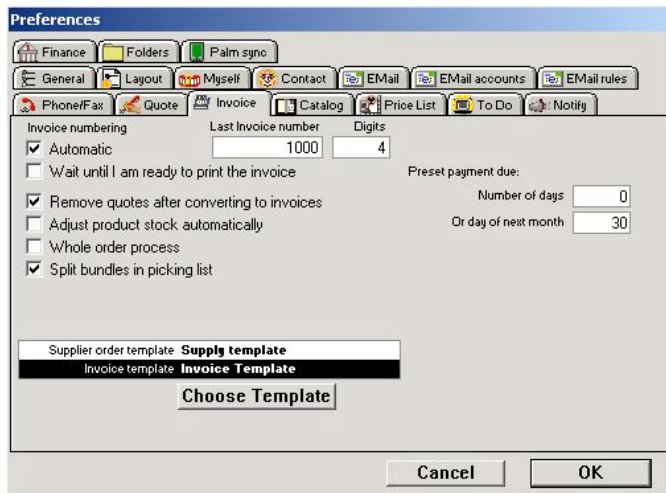
Default reminder days

You can specifiy the default reminder days for new quotes here.

Default Quote template

New Quotes can have a Print template installed as they are created. A template is chosen with the button "Choose template" below the template field.

Invoice

The Invoice mode shows the settings for Invoices and Orders

Invoice mode

Invoice numbering

Automatic invoice numbering can be used to reference new invoices as they are created. Check this option on if you wish to use this feature.

If you are using a network of SaleSmartz applications, be sure that each user uses the same Shared properties document, stored on a server disk. The last invoice number is stored in the properties document and is checked to provide a unique invoice number.

Wait until I am ready to print the invoice

This option will set the invoice number when you print the invoice for the first time instead of when you convert a quote to an invoice.

Remove quotes after converting to Invoices

Quotes can be converted to Invoices. The original Quote can be automatically removed once converted, by checking this button.

Adjust product stock automatically

If you use the product stock option in price lists, this option will adjust stock levels to account for products used in invoices/orders.

Whole order process

If you use more than the invoice document, then you can click this option on so you can print and record other order-related documents.

Templates

Each step of the order process can have a preset template which will be installed when an order/invoice is created. Each template is chosen with the button "Choose template" below the template fields.

Preset payment due

Here you can choose to set the payment due date for new invoices. Choose either the number of days after the invoice was created, or the day of the next month if your payement terms are set this way.

Catalogue

The Catalogue mode shows settings for Catalogues and an option for Quotes.
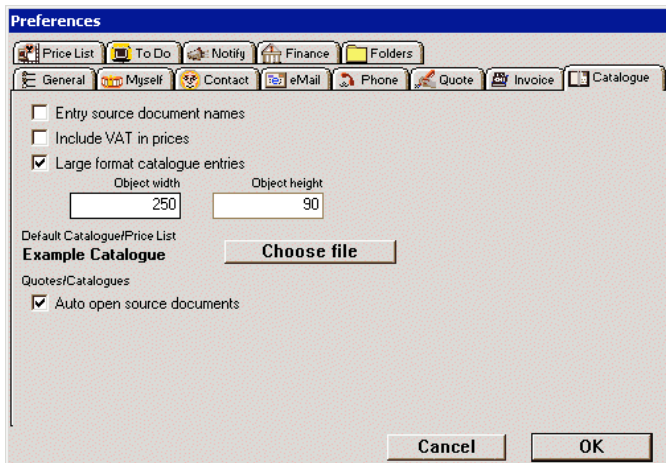
Catalogue mode

Entry source document names

Catalogue entries will show the file name of its source document (Price List) in its information field.

Include Sales tax in prices

If you check this option, prices shown in a catalogue will include sales tax.

Large format catalogue entries

Catalogues entries can have two different sizes. This check box sets the size to large.

Object width/height

These fields allow you to define the size of large catalogue entries. The units are pixels (screen dots).

**Default Catalogue/Price List**

This field contains the name of the application's default Catalogue or Price List file if installed. This file is opened when you select "Open Catalogue/Price List" in the "Windows" menu and also when you use the "Add" popup menu in a quote. Click on the button "Choose file" to select a new file.

Auto open source documents

Catalogues and Quotes have source documents which store prices and other information for Products and Bundles. These source files can be automatically opened when a Quote or Catalogue file is opened. To Do this, click on this check box. The Source file will then be opened, but hidden (Visible only in the "Windows" menu).

Price List

The price list mode defines price types and Sales tax.
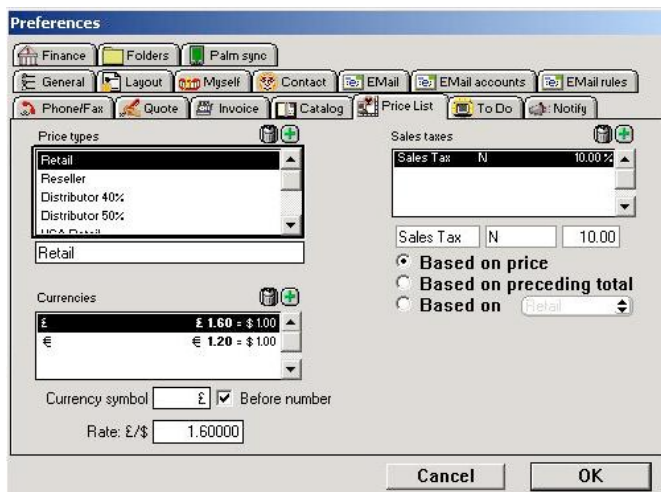
Price List mode

Price types

Price types can be used to define different pricing levels e.g. retail and wholesale. New types can be added by clicking in the price types field and selecting "New price type" in the "Edit" menu. These price types appear in price list and product information windows.

Sales tax

A list of all sales taxes is included in this field. These sales taxes can be added by clicking in the Sales tax field and selecting "New sales tax" in the "Edit" menu.
Sales taxes can be based on price types, but are usually based on the price of products.

Currency

You can set up the currencies you may use, in this list. These can be attached to your cost or sell prices if your products use different currencies from your default.

To Do

The To Do mode sets the preferences for To Do related windows.
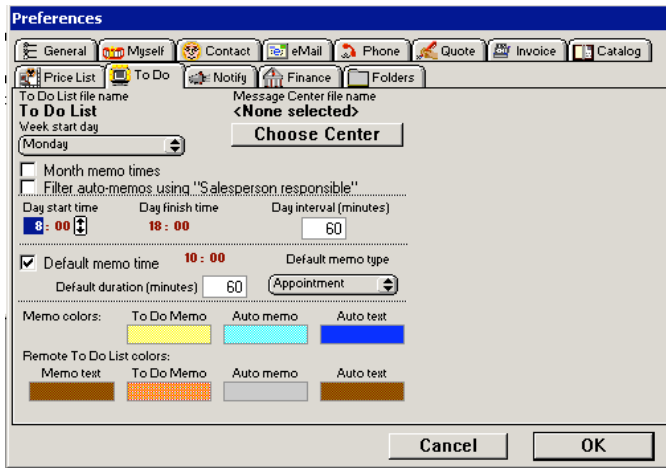
To Do mode

To Do List file name

The application's To Do List file name is recorded here.

Message Centre file name

If you have installed a Message Centre, its name is listed here. A new Message Centre can be chosen by clicking on the "Choose Centre" button (See chapter "Time Manager (Calendar)").

Week start day

In the To Do Month window, days of the week are shown. The starting day of each week can be chosen here.

Month memo times

Choosing this option will display the time for each To Do Memo listed in the To Do Month window.

Day Times

The To Do day window has time guidelines in hours. These guidelines can be set here.

Day start time

The To Do Day window starting hour guideline.

Day finish time

The end of the guideline hours.

Day interval (minutes)

The interval (in minutes) between each guideline hour in the To Do Day window.

Default memo time

A To Do memo created by dragging an object into the To Do Month window will have a due date set as the destination day of the month. The default time of that day can be set here. If you turn off the "Time related" button, new memos will have no due time, just the day.

Default memo type

As mentioned above, a memo can be created by dragging objects such as Contacts/Quotes on to one of the To Do windows. These created memos will then have the default type set here.

Default duration (minutes)

You can set the default duration time for all new To Do Memos in this field.

Memo colours

The base colour of the To Do Memo windows can be set here. The Auto Text colour will be used when an Auto To Do memo appears in a list. Click on a colour block to open the colour editing dialogue.

Remote To Do List Colours

When you open a Message Centre or another user's To Do List file, their To Do Memos will appear in different colours. This is to avoid confusion as to where these memos come from.

Notify

The notify mode sets the default actions for To Do Memos that become due. This relates only to the memos that have a due date, i.e. "Date related".
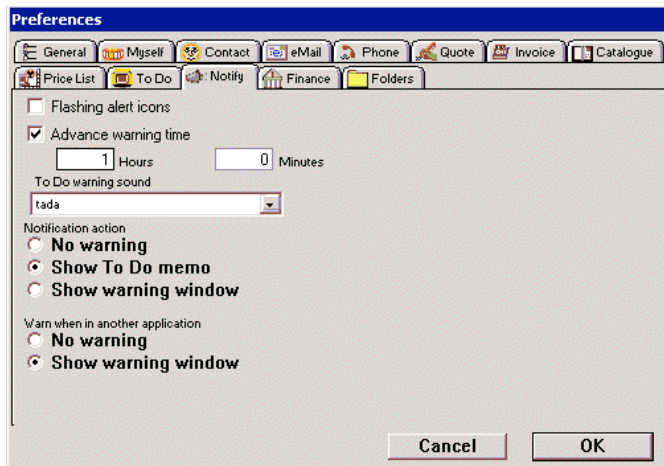
Notify mode

Flashing alert icons

Memos in the To Do List that are overdue will show an alert icon beside the description field in the list window. They will also show the icon in the To Do Memo window. If this check box is checked, these icons will flash to draw your attention to them.

Advance warning time

A time can be set to warn in advance that a To Do reminder will be due. A reminding action, the same as the notification action above will be done.

To Do warning sound

A sound can be played when a To Do Memo is due. The sound (or a no sound option) can be chosen in this popup menu.

Notification action

The action taken to show the warning when the memo is due can be set here.

> **No warning**
>
> Due memos will be ignored. Only an alert icon will show that a memo is due.
>
> **Show To Do memo**
>
> The memo window will be opened when it becomes due.
>
> **Show warning window**
>
> A window will appear displaying information about the memo when it is due.

Warn when in another application

When a To Do reminder is due and you have the application running in the background (i.e. while you are using another application), a warning can be sent to you to show the reminder is due. This warning action is in addition to whatever action is taken as set above

> **No warning**
>
> Nothing will be done to warn you about a reminder when you are using another application.
>
> **Icon in menu (Macintosh only)**
>
> A beep will occur and then a flashing icon will appear in the application menu to the right of the screen.
>
> **Show warning window**
>
> A window will appear displaying information about the memo when it is due. On a Macintosh, a flashing icon will appear and the beep will also occur.

Finance

The finance preferences mode allows the editing of finance rates used for Quote and Invoice finance examples. Finance is selected in the Costs mode of a Quote.
If you offer the option for finance you can enter and update the current terms and rates for finance in these fields.
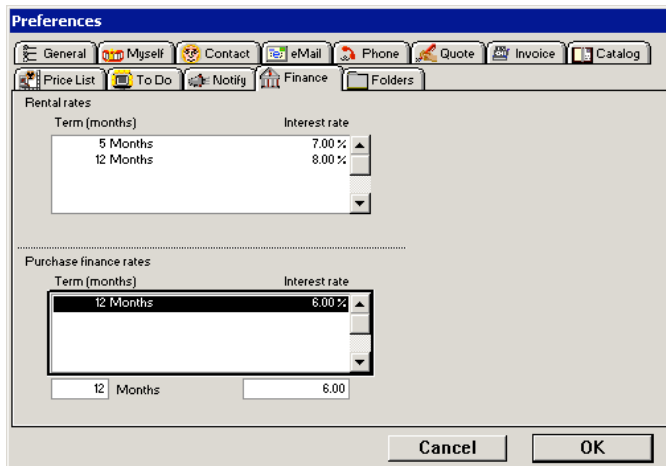
Finance mode

There are two fields in the finance mode. The top for the list of rental finance rates, and the lower for the purchase finance rates.

Adding rates

To add a finance rate and term, click in the field you wish to use and select "New rate" in the "Edit" menu. A new default rate will appear. Type the term (in months) in the field below the list to the left and its associated percentage rate in the field to the right.

Deleting rates

To remove a rate from either of the rate list fields, select the line you wish to delete and select "Clear rate" in the "Edit" menu or press the "Delete" key.

Editing rates

Rates can later be edited by selecting a line and typing values into the two editing fields below the list.

Folders

The folders mode provides settings for automatic saving of contacts and other files.
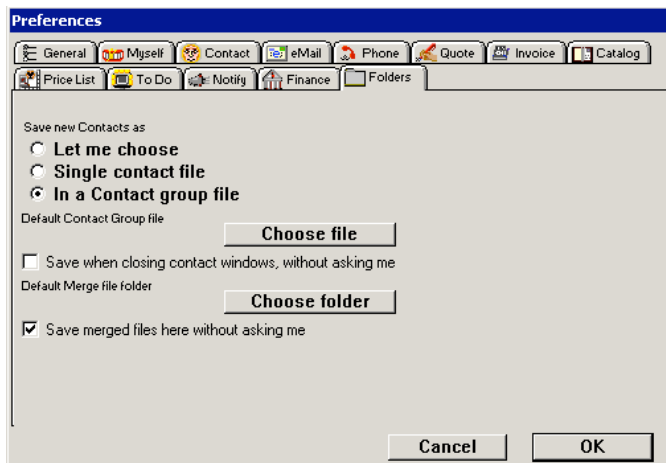
Folders mode

PC compatible file names (Macintosh only)

This option will add the 3 letter suffix to file names when you save files for a macintosh. This suffix is needed for PCs to access the files. If you are using a mixed network of Mac and PC then you should select this option.

Save new contacts as

These options allow you to choose the method of saving new Contacts.

Single Contact file

This option saves new contacts as single files on a disk. The "Choose folder" button allows you to choose a folder to be used as the default for saving new Contacts.

In a Contact Group file

This option saves new Contacts in a Contact Group chosen with the "Choose file"

button.

Default contact group file

This sets the default group where new contacts will be saved.

Save when closing contact windows, without asking me

This option saves new Contacts when you close the Contact window, without asking to save.

Default merge file folder

This folder can be set to contain all new merge templates so you don't have to find the folder each time you save a merge file.

Save merged files here without asking me

This option can be used to automatically save all merged files without a "Save file" dialogue.

Default merge document application (Macintosh only)

Word processor merge templates should be saved as "RTF' format and stored in the "Merge templates" folder inside the application's folder. If these merge templates have no application type then a default application can be set in these preferences. This application will be launched with the new merged file after it has been saved (See chapter "Mail Merging").

Palm

The palm mode provides settings for synchronizing with Palm devices.
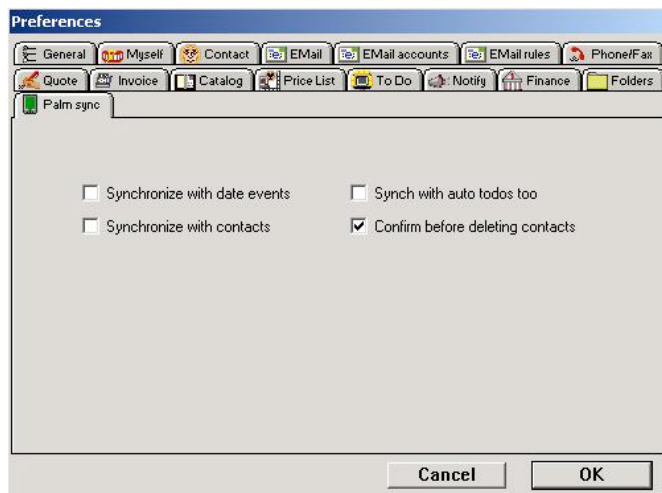
Palm mode

Synchronize with date events

Check this option if you want to synchronize with date/calendar events

Synchronize with auto to dos too

This option includes the automatic (blue) to dos in the syncrhonization
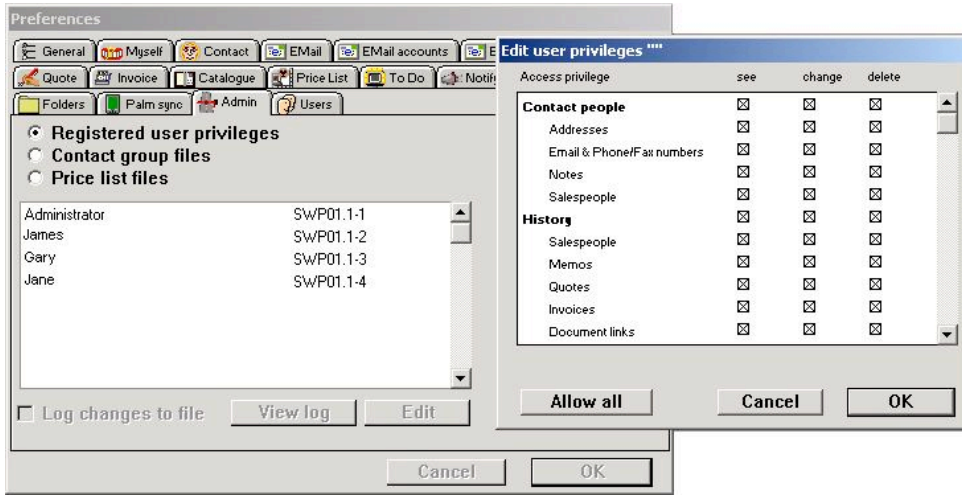
Synchronize with contacts

Check this option if you want to synchronize with contact/addresses

Confirm before deleting contacts

This option will prompt you before a synchronization will delete any contacts in the SaleSmartz database.

Admin (Administrator only)

The admin mode provides settings for multi user privileges.

Admin mode

There are three modes for editing privileges:

Registered user privileges

You can define what access certain users have to various areas of the application. Click on the user and the "Edit" to edit their privileges, as shown in the window above.

Contact group files

You can define what users have what type of access to each contact group file.

Price list files

You can define what users have what type of access to each price list file.
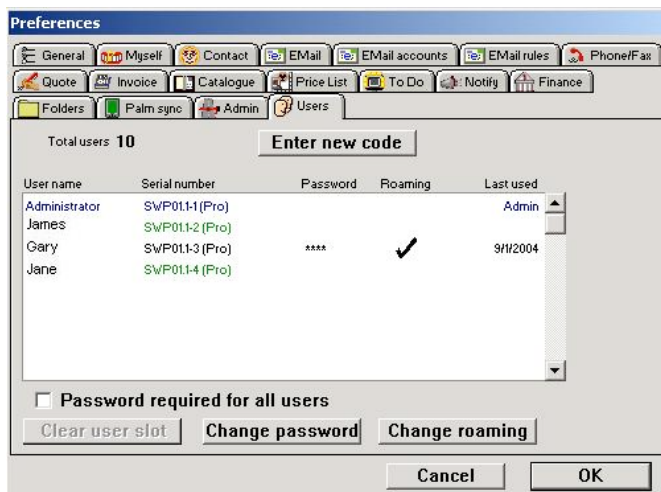
Log changes to file

This option will log changes to a log file for future reference.

View log

This button will open a window with a list of saved logs.

Users (Administrator only)

The users mode provides settings for user licences and passwords.

Users mode

Total users

This field contains the total number of users you that your licence covers.

Enter new code

If you have added more users, you can enter the new code supplied by EuroSmartz by clicking on this button.

User list

This list shows all users and their status. The name of the users is set by each user in their own "Myself" preference.

Password required by all users

This option will require all users to set and enter a password at startup.

Clear user slot

This button will clear the user associated with the serial number so you can change the licence to another computer.

Change password

Clicking this button will allow you to set/change a password for a user.

Change roaming

This action will allow a user to log in from another computer and retain their preferences and To Do list.