axis98™

Version 2.0.1

User Manual

Last Updated on 8/4/98

Overview

Axis 98™ is a relational database system engineered specifically for companies in the graphic design, multimedia, advertising and service bureau industries. This software accounts for both workflow operations and financial aspects unique to these industries. Its well-conceived functionality addresses everyday procedures faced by each company, such as management of clients, projects, invoicing and personnel. Its open-ended design however, allows each company to tailor Axis 98 to their specific areas of service, procedures, client types, tax rates and marketing. With its efficient trafficking features, Axis 98 can also be employed by internal graphics and multimedia departments of large corporations. By compiling data throughout the various steps of each project, Axis 98 will provide powerful reports detailing financial and marketing analyses, staff performance, project status and much more.

Since Axis 98 is tailored to the needs of management, sales, production and trafficking personnel, specific passwords can be created for each individual. These passwords allow access to areas that the individual is involved with, yet protecting the confidentiality of areas that do not.

Configurations of this data management system range from licensing for the single, standalone application to an unlimited amount of users in a client/server environment. In order to accommodate varying company sizes and growth, Axis 98 can be purchased and upgraded in versions of a predetermined number of user licenses. A system robust enough to grow with your company.

To understand the processes of Axis 98, it can be illustrated in the following chain of procedures: Installation of program, understanding navigation, configure to your business services, add personnel data, allocate passwords, enter all client data, provide project price quotations, open and update projects, invoice projects, track invoice payments, calculate personnel compensation and analyze workload, sales performance and project statistics. This manual is constructed chapter-by-chapter to follow this chain of procedures to easily educate you about the system. Simply proceed through this manual to quickly and efficiently put Axis 98 to work for you!

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CHAPTER 1: SYSTEM INSTALLATION

Before we get into the actual installation procedure, we'll briefly explain what types of installations are available, and how they relate to Axis 98.

Axis 98 can run in two different ways. The first way is as a standalone database; in other words, running on only one computer in your office. When used in this way, only one person at a time can operate the system. The second method of using Axis 98 is networked. In a networked configuration there are two parts: the workstation and the server. Simply put, the workstation software is installed on every computer that will use the system, and is basically "Axis 98" itself. The server piece consists of only the back-end database file. This "datafile" sits on a file server in a shared folder that all workstations can access. The workstations link to this datafile, which is where all Axis 98 data is actually stored.

When the CD ROM is inserted, it should autoplay, and after a few seconds you should see the Axis 98 InstallPad Window. If you have autoplay turned off, or it doesn't start for some reason, look inside "My Computer" and open the CD ROM manually. Then double-click (run) the file "InstallPad.exe".

Standalone Installation:

When you click on the "Standalone Installation" button, the setup program begins. A confirmation dialog appears explaining, briefly, what installation you're running. Click YES to continue.

Next is the user license agreement. Please read the agreement which explains the terms of use, and disclaimers associated with the program. Click I Agree to continue with the installation. If you don't agree to the terms, click I Do Not Agree, and the installation will be aborted.

You can then click Continue at the welcome dialog. You'll then be asked to choose a destination folder to install Axis 98 into. The last step is to click on the Install Now button to proceed with the installation.

When the installation is complete, you'll need to restart your computer. When it starts up again, you'll find an Axis 98 Standalone group in your Start Menu, from which you can run the program.

Network Installation:

To install the network version of Axis 98, you'll need to install the server datafile, then the workstation(s) software.

Server

When you click on the "Server Installation" button, the setup program begins. A confirmation dialog appears explaining, briefly, what installation you're running. Click YES to continue.

Follow the on-screen instructions and make sure that you install the datafile into a folder on the network server that all workstations can access. Continue with installing the workstations.

Workstation

When you click on the "Workstation Installation" button, the setup program begins. A confirmation dialog appears explaining, briefly, what installation you're running. Click YES to continue.

Next is the user license agreement. Please read the agreement which explains the terms of use, and disclaimers associated with the program. Click I Agree to continue with the installation. If you don't agree to the terms, click I Do Not Agree, and the installation will be aborted.

You can then click Continue at the welcome dialog. You'll then be asked to choose a destination folder to install Axis 98 into. The last step is to click on the Install Now button to proceed with the installation.

When the installation is complete, you'll need to restart your computer. When it starts up again, you'll find an Axis 98 Workstation group in your Start Menu, from which you can run the program. When you run the program for the first time, it will ask you to find the server data file backend.mdb. Use the explorer-style dialog to navigate to the network folder where you previously installed the server datafile, and double-click on that folder. The program will now run.

Network Installation:

To install the network version of Axis 98, you'll need to install the server datafile, then the workstation(s) software.

Server

When you click on the "Server Installation" button, the setup program begins. A confirmation dialog appears explaining, briefly, what installation you're running. Click YES to continue.

Follow the on-screen instructions and make sur that you install the datafile into a folder on the network server that all workstations can access. Continue with installing the workstations.

Workstation

When you click on the “Workstation Installation” button, the setup program begins. A confirmation dialog appears explaining, briefly, what installation you’re running. Click YES to continue.

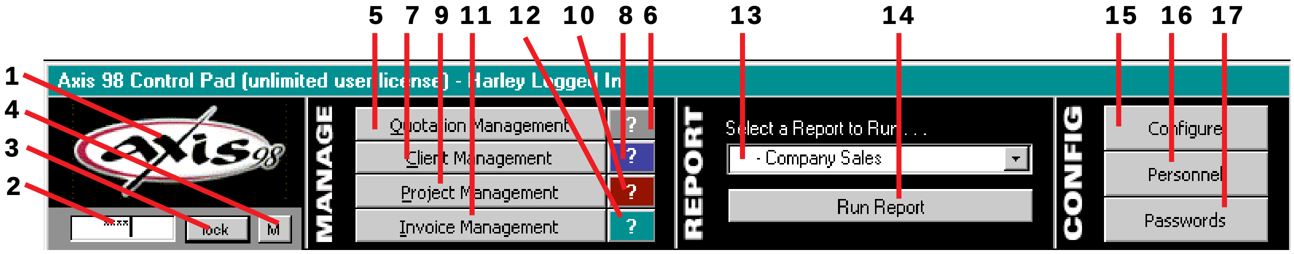
Next is the user license agreement. Please read the agreement which explains the terms of use, and disclaimers associated with the program. Click I Agree to continue with the installation. If you don’t agree to the terms, click I Do Not Agree, and the installation will be aborted.

You can then click Continue at the welcome dialog. You’ll then be asked to choose a destination folder to install Axis 98 into. The last step is to click on the Install Now button to proceed with the installation.

When the installation is complete, you’ll need to restart your computer. When it starts up again, you’ll find an Axis 98 Workstation group in your Start Menu, from which you can run the program. When you run the program for the first time, it will ask you to find the server data file backend.mdb. Use the explorer-style dialog to navigate to the network folder where you previously installed the server datafile, and double-click on that folder. The program will now run.

CHAPTER 2: CONTROL PAD

The Control Pad is the main navigation of this system. It provides access to all the various screens and reports. Following is a step-by-step description and usage of each feature.

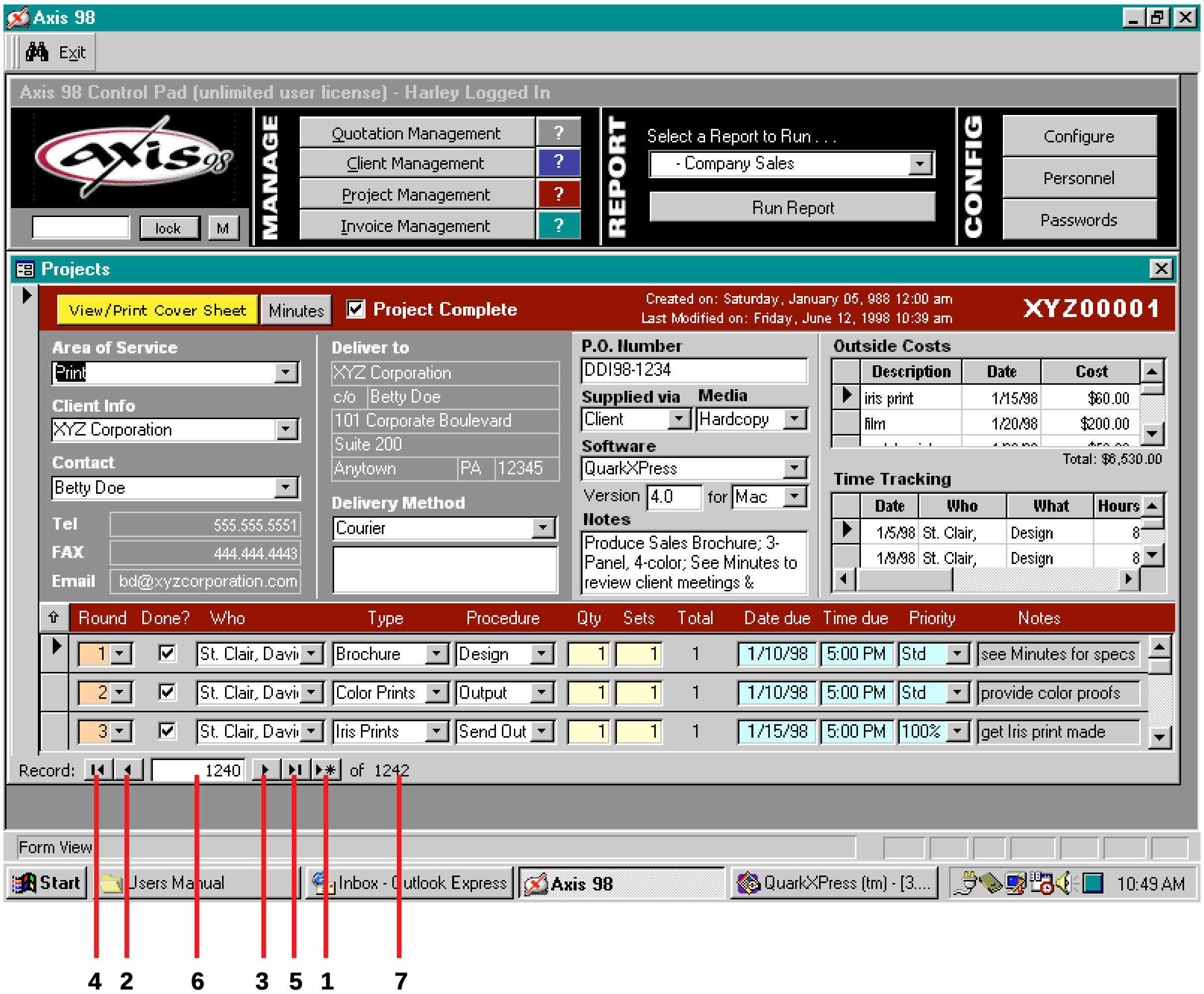


1. Logo: Click on the Axis 98 logo to retrieve technical support contact information, link to the Axis 98 web site, registration number, and authoring credits.
2. Password field: The temporary password for your system is DEMO. Type this pass word in the blank field and hit the Enter key. All the button text should now become visible, making each accessible. This temporary password will give you access to the entire system. **Attention Business Owner and/or General Manager:** Once you have finished configuring the system, go to the Password Screen (17). Highlight the DEMO password and change it to a personal and confidential pass word of your choice. This will be imperative to protect the confidentiality of the financial and personnel information entered into the system. Details and specific step-by-step instructions will be provided about passwords in Chapter 7.
3. Lock/Unlock Button: When the Unlock text is displayed on this button, the pass word must be entered to gain access to the system. When the “lock” text is dis played on this button, you have the option of locking the system without closing the entire program. Simply click on the the button and the system becomes l locked. This is convenient if you are leaving your computer for a brief moment and you don’t want to waste time closing, then reopening the program. Upon your return, you must re-enter your password to gain access.
4. M: This is the internal messaging system for the network configuration of Axis 98. Simply click on this button and a pop-out, messaging window will appear. You will be able to choose any other user from the pulldown menu. In the provided field, type your message, When finished, click the Send Message button. Within 15 seconds, the message will be delivered to the desired user. If the user is not currently logged in, the message will wait until the next time the user logs in.
5. Quotation Management: Click this button to produce, print, and retrieve price quotes for potential projects. See Chapter 9 for details.
6. Gray Box: Click this box to display a help tour of the Quotation Management Screen. This tour provides an on-screen description of various features and functions.
7. Client Management: Click this button to enter and retrieve client data, codes and contact information. See Chapter 8 for details.

8. Blue Box: Click this box to display a help tour of the Client Management Screen. This tour provides and on-screen description of the various features and functions.
9. Project Management: Click this button to enter new project information, track labor, and outside costs. See Chapter 10 for details.
10. Red Box: Click this box to display a help tour of the Project Management Screen. This tour provides and on-screen description of the various features and functions.
11. Invoice Management: Click this button to create and print invoices and to mark paid invoices. See Chapter # for details.
12. Green Box: Click this box to display a help tour of the Invoice Management screen. This tour provides an on-screen description of the various features and functions.
13. Reports: From this pulldown list, select the report that you choose to view. The report title should now be visible in the window.
14. Run Report: To view the selected report, click the Run Report button. If this a date specific report, you will now see a menu to select the desired date range.
15. You can tailor the report to an exact, specific time period by using the Date Range calendars at the top of the screen. From the month and year pulldown menus select the desired start month and year. Next click on the start day on the calendar. You will notice that the end date on the adjoining calendar will automatically default to exactly two weeks later. This is set up this way because most companies use two week pay periods. This is a built-in shortcut for running reports regarding wages, commissions and profit sharing. Select the desired month, year and day for the end date. Once the dates are set, click the Use Date Range button to run the report. To print the report to your default printer click on the printer icon (SHOW ICON) at the top of the screen. If, however you have loaded special paper or letter head in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray.
16. Click the All button to retrieve all data ever entered in the system pertaining to this report.
17. You can use the preset short cut date ranges provided as buttons at the bottom of the screen.

Chapter 3: Navigation Bar

The Navigation Bar enables you to move forward and back through the Records. A "Record" is each stored data screen. The Navigation Bar appears at the bottom of each page as a row of buttons labeled with arrows.



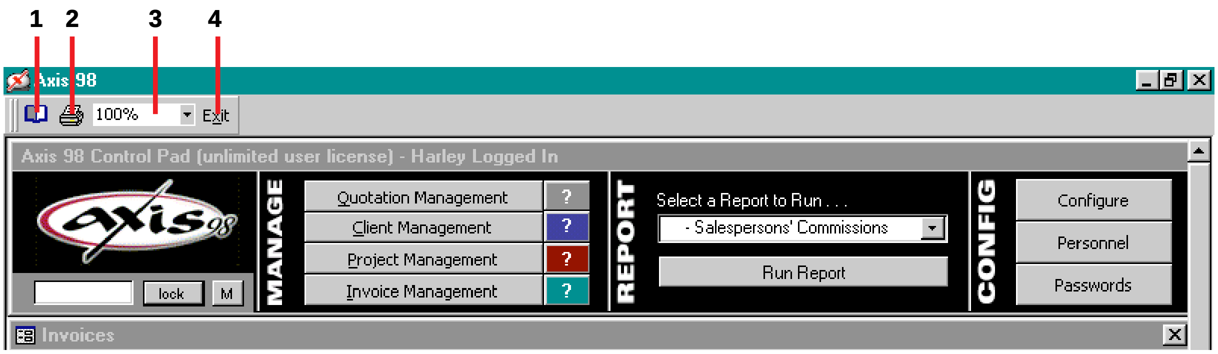
1. New Record: The Navigation Bar enables you to first create a new record. Click on the ▸* to open a new Record. A new screen with blank fields will now appear. You can begin entering data to create a new record for a client, project, invoice, employee, etc. Axis 98 automatically saves as you enter data, therefore it is not necessary to do a manual save. Whenever you want to add a new entry, such as a new client or new project, you must create a new Record by clicking on the ▸* button. NEVER type over an existing record that already has the fields filled in.
2. Back: By clicking on this button, you can move back through the records one at a time.
3. Forward: By clicking on this button, you can move forward through the records one at a time.

4. First Record: By clicking on this button, you can move directly back to the very first record entered.
5. Last Record: By clicking on this button, you can move directly forward to the last record entered.
6. In the middle of the bar is a field displaying the record number of the data currently on the screen.
7. At the far right of the Navigation Bar is a number displaying the total number of records in this section of Axis 98.

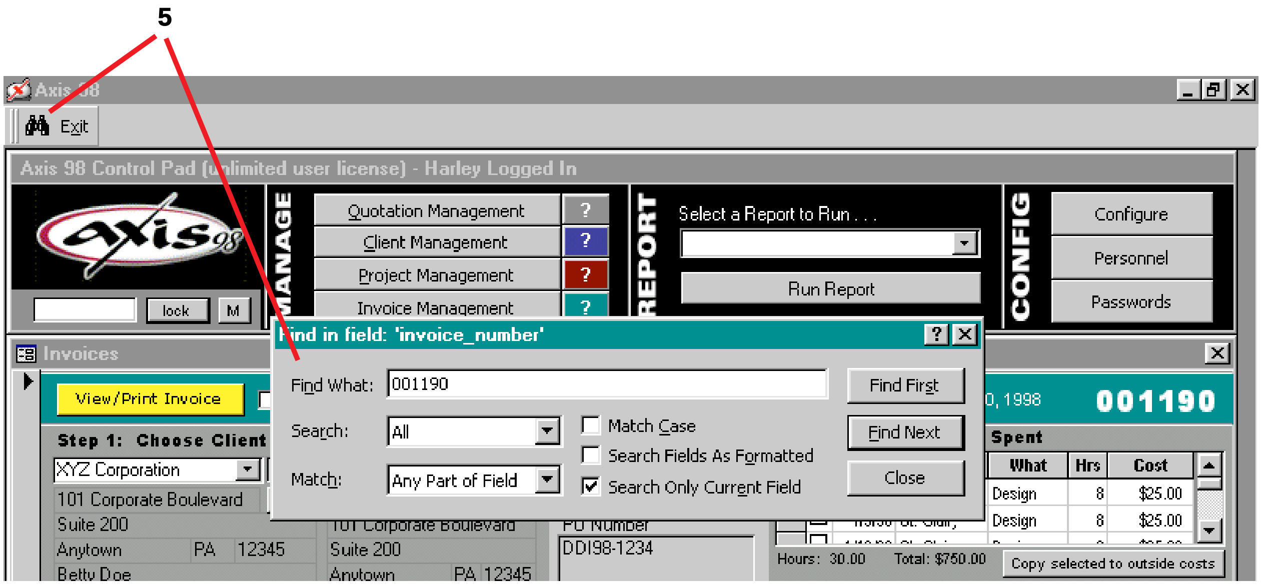
When you create a new record or make a change to an existing record, you must move forward or back to another record to affect the change throughout the system. For example: you go to the Client Management Screen and add a new contact person to an existing client record. When finished, you now must move forward or back to another client record. You can now go to the Project Management Screen to create a new project and assign the new contact person.

Chapter 4: Function Keys

The function Keys are located in the upper left corner of the screen above the Control Pad. These icons will assist you with printing, viewing, searching and exiting Axis 98. Following is a description of each.



1. Page Setup: The page setup function is provided only as an alternate means of selecting a different printer or specific tray. First you must be previewing a report on screen. After clicking on this icon, select the Page Tab. In this window, use the pulldown menu and/or the printer button to navigate to the desired settings. Do not use this icon to try to reconfigure the page layout. All pages are preconfigured to a specific setup and should not be altered.
2. Print: This button will is a shortcut to your default printer settings. You must always click on the Print/Preview Button before using this button. Otherwise, you will print the actual screens with data fields. After previewing a report on screen, click this icon to print.
3. Zoom: This pulldown menu allows you to view reports on screen at a variety of sizes. Simply select a view percentage and click on it. The image size on the screen will change accordingly.
4. Exit: By clicking this button you will completely quit out of Axis 98.
5. Search: (See next page) The search tool will allow you to seek out past projects, invoices, quotes, clients, etc. To use this tool first go to the section type that you you are searching for. To find a previous invoice go to the Invoice Management Screen. You can now search by any field, such as invoice #, client name, contact name, project # or P.O. # by clicking within the field. Now click on the Search icon. Type your search text in the Find What field. Next, you can tailor your search by using the pulldown menus and checkboxes. Once you have configured your search, click the Find First button. This will take you to the first record that has a match. If this is not what you were looking for, click the Find Next button until you find the appropriate record. When finished searching, click on the box with an X in the upper corner of the search window. This will close the search tool and allow you to resume working.



Short Cuts

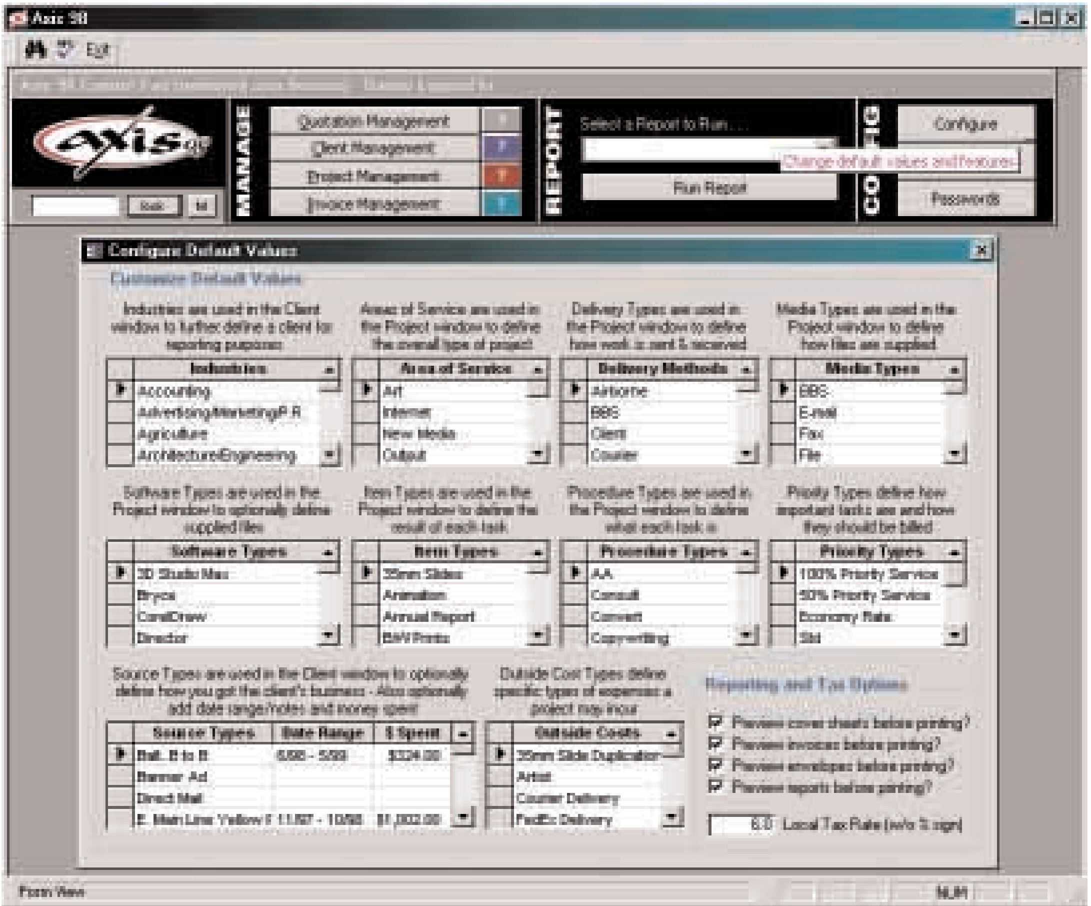
Below is a listing of short cuts to expedite your time entering data.

When you enter data from any pulldown menu you can simply click in the field and start typing the selection until Axis 98 recognizes the desired choice. Generally you will retrieve your desired selection with just a few letters.

When you are ready to print anything from Axis 98 to your default printer, simply click the printer icon at the top of the screen. Whenever printing you must first click on the yellow preview/print button regardless of the desired printer settings.

CHAPTER 5: CONFIGURE SYSTEM

Axis 98 allows you to configure various categories in order to customize the system to your business. Click on the Configure Button on the left side of the Control



Pad. These customizable categories will appear as pulldown menus throughout the various screens. The current version you have purchased has these fields already filled in as an example of what type of items should be in each section. These items can be changed, deleted or retained. The following information will detail each category and what it affects throughout the system. Take some time to customize each field to appropriately match your business services and procedures. Over time you can modify these lists to account for new clients and new services.

Manipulating each group of values (eg. Industries, Project types, etc.)

1. To add a new item, simply click your mouse in the field at the end of the list that has an asterisk in the Record Selector bar on the left side. This is a placeholder for a new item (Record). When you're done typing, press the ENTER key and the item is added to the system. A new, blank placeholder will be created beneath it for the next entry.
2. To delete an item, select it (click on the Record Selector bar on the left) and press the DELETE key.

3. You can select multiple items by clicking and dragging the Record Selectors along the left side of each item.
4. To copy/paste an item from one list to another, first select it by either clicking in the Record Selector or by highlighting the actual text and press Ctrl C on your keyboard. Now click in the new record and press Ctrl V to paste it as a new item.
5. The items in these lists are presented throughout Axis 98 as pulldown menus with the items displayed in alphabetical order. For example, in the Project Management Screen there is a designated field to select the software used for the project. Click on a pulldown list labeled "Software" to select from the preconfigured list of items. This list, and others like it, are created by you in the Configure Screen, to not only save typing but to provide consistency for reporting purposes.

Following is a description of all the categories and options.

Category: Industries

Description: This category is a listing of the various industries that best describe the business services of each of your clients. This will allow to define your client base by particular industries.

Where It Appears: The industry category will appear in the Client Management Screen. As you enter a new client, you will select one of the industry types from the pulldown menu which most accurately describes the services of this client.

What It Affects: By assigning each client with an Industry type, Axis 98 will provide 3 reports: Industry Ranking Report (Chapter 12) shows gross and net sales, categorized by industries, over any desired time period; Number of Clients by Industry (Chapter 12) ranks the number of clients you have in each industry; Annual Sales Trends by Industry (Chapter 12) depicts sales volumes by month over a desired year, shown both numerically and graphically.

Category: Project Types

Description: This category is a breakdown of the various services that your business provides. Carefully dissect the distinctive areas of your business that uniquely generate revenue; specific profit centers of your company.

Where It Appears: The Project Types will appear in the Project Management Screen. As you enter a new project, you will select one of the project types from the pulldown menu which most accurately describes this particular project.

What It Affects: By assigning each project with a type, Axis 98 will provide the following report: Project Ranking Report (Chapter 12) shows the number of projects, gross and net sales, categorized by project types, over any desired time period.

Category: Delivery Methods

Description: This category is a listing of the various means by which a client and/or your company can receive or deliver a project.

Where It Appears: The Delivery Methods category will appear in the Project Management Screen. As you enter a new project, you will be required to select a Delivery Method by which the finished project will be delivered as well as how your company will receive the initial information, Supplied Via, to undertake the project.

What It Affects: By assigning each project a Delivery Method and Supplied Via from the list, this information will be printed on the project's Cover Sheet detailing the necessary information for the person responsible for this particular project.

Category: Media Types

Description: This category is a listing of the various external media types by which a client will provide files and/or content for this project.

Where It Appears: The Media Types category will appear in the Project Management Screen. As you enter a new project, you will be required to select a Media Type to denote how client originals and/or files are being provided.

What It Affects: By assigning each project a Media Type from this list, this information will be printed on the project's Cover Sheet directing the person handling the project where to look for the necessary files.

Category: Software Types

Description: This category is a listing of the various software types that the client used or the software that the project needs to be created in.

Where It Appears: The Software Types category will appear in the Project Management Screen. As you enter a new project, you will be required to select a Software Type to denote what software the client used or what software the artist should use to create the project.

What It Affects: By assigning each project a Software Type from this list, the information will be printed on the project's Cover Sheet directing the responsible employee.

Category: Item Types

Description: This category is a specific listing of the various types of projects your company will undertake or have already undertaken.

Where It Appears: The Item Types category will appear in the Project Management Screen. As you enter a new information for each Round of the project, you will be required to select an Item Type to clearly describe what the finished project is to be.

What It Affects: By assigning each project a Media Type from this list, the description will be printed on the project's cover sheet quickly describing the project of each Round.

Category: Procedure Types

Description: This category is a specific listing of the various tasks required to complete the the project. (view this as the verb)

Where It Appears: The Procedure Types category will appear in the Project Management Screen. As you enter a new information for each Round of the project, you will be required to select a Procedure Type to clearly describe what actions need to be taken. If your company uses billing codes for particular tasks, you may also include these numbers with the label for better organization.

What It Affects: By assigning each Round a Procedure Type from this list, the necessary task will be printed on the project's cover sheet quickly describing the labor required for each Round.

Category: Priority Types

Description: This category is a way of denoting the urgency of each Round of the Project and also is a reminder of additional Rush Charges that should be incorporated into the invoice. It is only a notation and does not affect the calculating process of the invoice.

Where It Appears: The Priority Types category will appear in the Project Management Screen. As you enter a new information for each Round of the project, you will be required to select a Priority Type to clearly describe at what rate the Round should be billed.

What It Affects: By assigning each project a Priority Type from this list, the notation will be printed on the project's cover sheet and also be displayed in the line item sections of an invoice as a reminder as to whether or not these items need to be billed at a special rate.

Category: Sources

Description: This category is a listing of the means by which new clients can be gained, such as yellow page advertising, trade publications, salesforce and direct mail. To gauge the profitability of each marketing vehicle, the money spent on each should also be entered. If the same publication is to be used throughout the year or over several years you must differentiate the name of the publication by adding a date reference. For example, you place an ad in the Philadelphia Yellow Pages and then run another ad the following year. You should distinguish each by adding the year after the name of the publication, i.e. Phila. Yellow Pages '97 and Phila. Yellow Pages '98. For monthly publications you would simply add the name of the month(s) in which your advertisement appeared after the publication's name.

Where It Appears: The Sources category will appear in the Client Management Screen. As you enter a new client, you will select one of the Business Source types from the pulldown menu which most accurately describes how the new client was attained.

What It Affects: By assigning each client with an Sources type, Axis 98 will provide 2 reports: Business Source Ranking Report (Chapter 12) shows gross and net sales, ranking each source, over any desired time period; Clients per Business Source (Chapter 12) ranks the number of clients you have gained by each source.

Preview/Printing Options

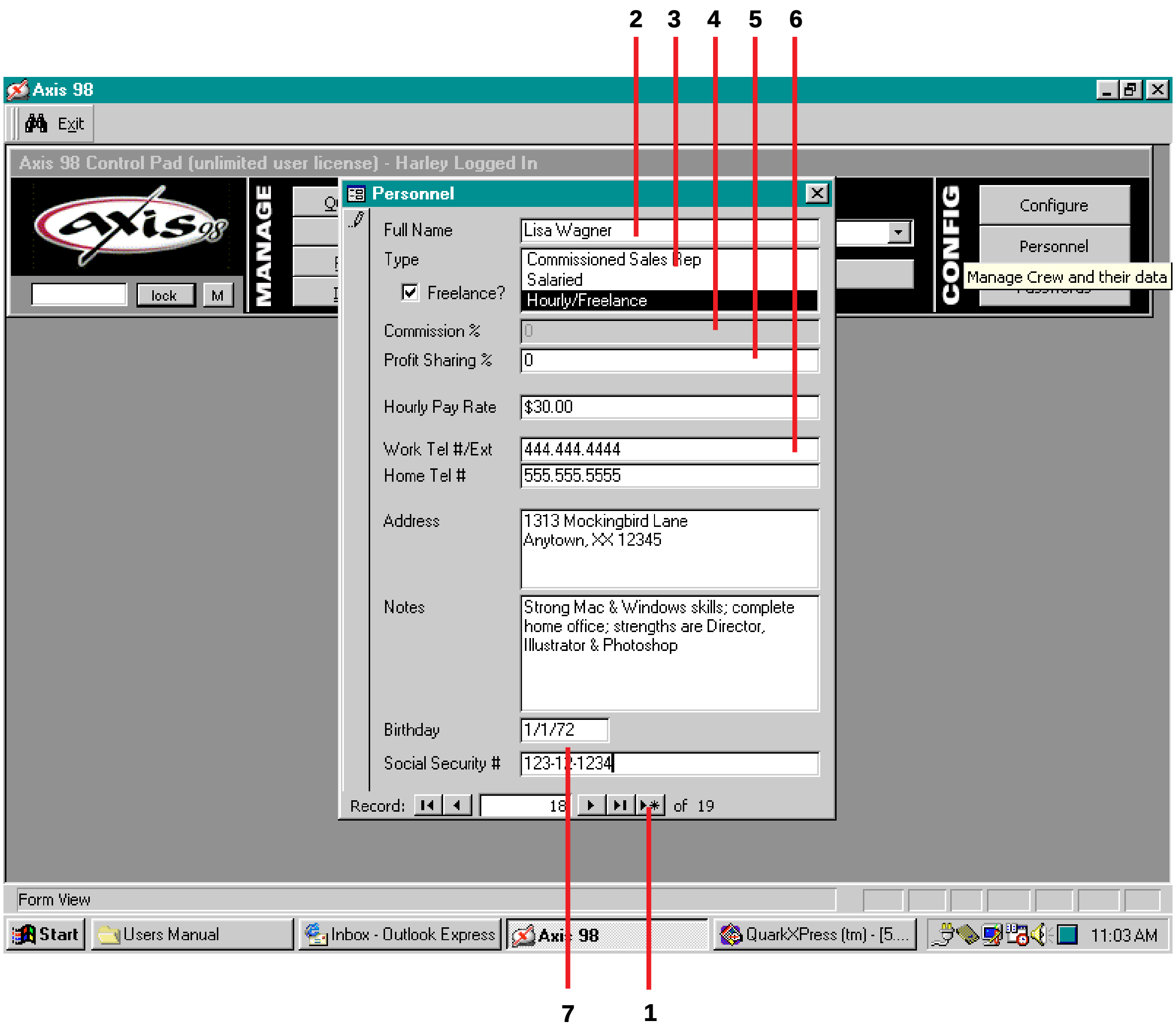
At the bottom of the Configure Screen, there are checkbox options pertaining to preview and printing of cover sheets, reports, invoices and envelopes. Currently, it has been set up with our suggested configuration. By selecting a checkmark in the box you will have enabled the preview option. By doing so, you will be able to preview, proof or select a specific printer's paper tray before actually printing. This also saves paper if you wish to only view a report on screen without printing it. If you deselect any of these checkboxes, the item will automatically print to your default printer when you click on the yellow Preview/Print buttons.

Tax Rate

In the bottom right corner of the Configure Screen, there is a field to enter the sales tax rate that you are required to charge your clients. Simply place your cursor in the field and enter the numeric value. It is not necessary to add %. Clients who are tax-exempt, or invoices that you specify as tax exempt, will not use this number. When creating invoices, Sales Tax will be calculated on this rate.

CHAPTER 6: PERSONNEL RECORDS

With the use of the Axis 98 system, you can organize information about your full and part time employees, as well as your staff of freelance employees, ranging from compensation to contact information.



To begin adding personnel information to your system, start by clicking the PERSONNEL button located on the far right side of the Control Pad.

1. Create a new entry by clicking the ▸* button on the Navigation Bar at the bot tom of the screen. This will present a new screen with blank fields.
2. Start at the top by entering the person's name. We recommend entering the last name first then a comma and the first name. All personnel records are ordered alphabetically by the first letter entered in this field. This name will be added to and placed in alphabetical order in all the "WHO" pulldown menus throughout the system. Having the last name first will make it quicker to select the appropriate person when you have several people with the same first name. From this data, the Personnel Contact List report will be generated (Chapter 12).

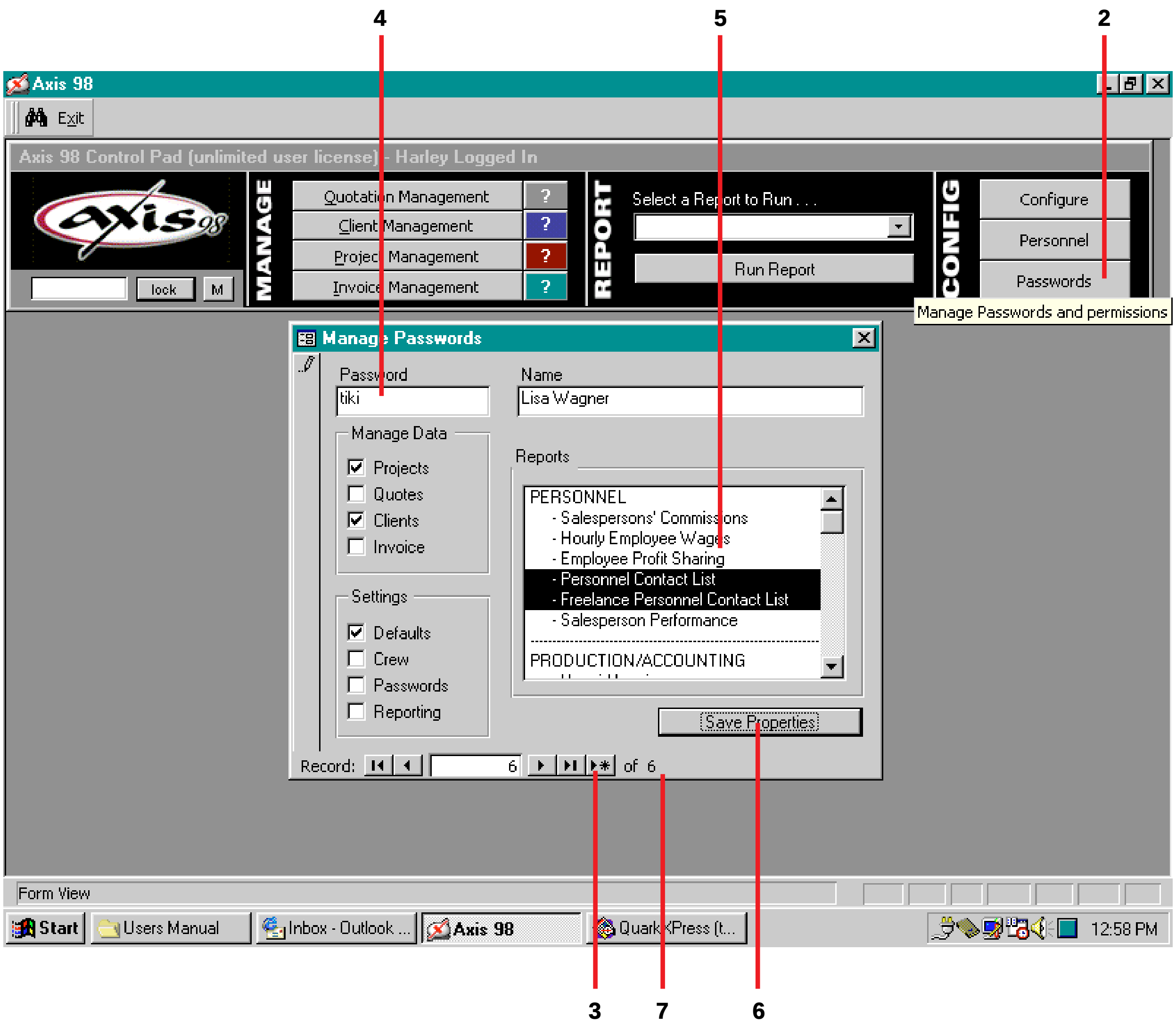
3. Next choose what type of compensation will be provided for this person: Commissioned Sales Rep, Salaried or Hourly/Freelance. Note: If this person is strictly a freelance employee, click on the Freelance? checkbox. This field will generate a specific report called “Freelance Contact List” (Chapter 12) in the reporting section of Axis 98. By choosing a specific type of compensation for each person, this field will generate several very useful reports, such as “Employee Profit Sharing”, “Hourly Employee Wages” and “Salespersons’ Commissions.” These reports will be discussed in detail on the Reports section of this manual (Chapter 12).
4. The Commission % field is the percentage of Net Sales that the Commissioned Sales Reps are compensated. The number entered in this field will generate a report called “Salespersons’ Commissions” (Chapter 12). This report will enable the person in charge of payroll the ability to select any desired pay period and automatically calculate the total amount of commission compensation due to each Commissioned Sales Rep in that date range.
5. The next field, “Profit Sharing %,” calculates a percentage from the Total Net Sales of the company. This is compensation that is to be paid to each designat ed employee as a profit sharing bonus. This obviously is contingent on your compensation package for each employee. If any or all of your employees are not entitled to profit sharing, simply enter 0. You cannot just leave it blank. This field will calculate the amount actual money the individual is entitled to by using the “Profit Sharing” report (Chapter 12) over any date range.
6. The 4 fields to follow, “Work and Home Telephone #’s, Address and Notes are fields that you can enter important contact information, as well as notes regard ing availability, skills and whether or not they have a home office. All OF this info will be contained in the “Personnel Contact List” report (Chapter 12) which provides a quick reference displaying all staff info.
7. The fields for Birthday and Social Security # are provided in order to retain this important information that often is required for tax purposes, medical plans and retirement compensation. This information will not be displayed or printed any where else in the system. It is meant as a stored, confidential reference. The only individuals that will ever be able to view this information are those who have access to Personnel and Passwords.

Chapter 7: Passwords

Axis 98 allows you to configure an infinite number of unique passwords for each individual using the system, depending on the number of user licenses you have purchased. Each password assigned can be configured to give specific access to specific areas.

Assigning Passwords

1. Begin by collecting confidential passwords from each individual that will be using the system.



2. Click on the Passwords Button on the Control Pad.
3. To create a new password, click on the new record button at the bottom of the frame. This will give you a new screen for you to begin customizing permissions to certain screens, specifically for this individual.
4. First, place your cursor in the Password field and type the appropriate password. Next, click in each box in the Manage Data and Settings sections that you want

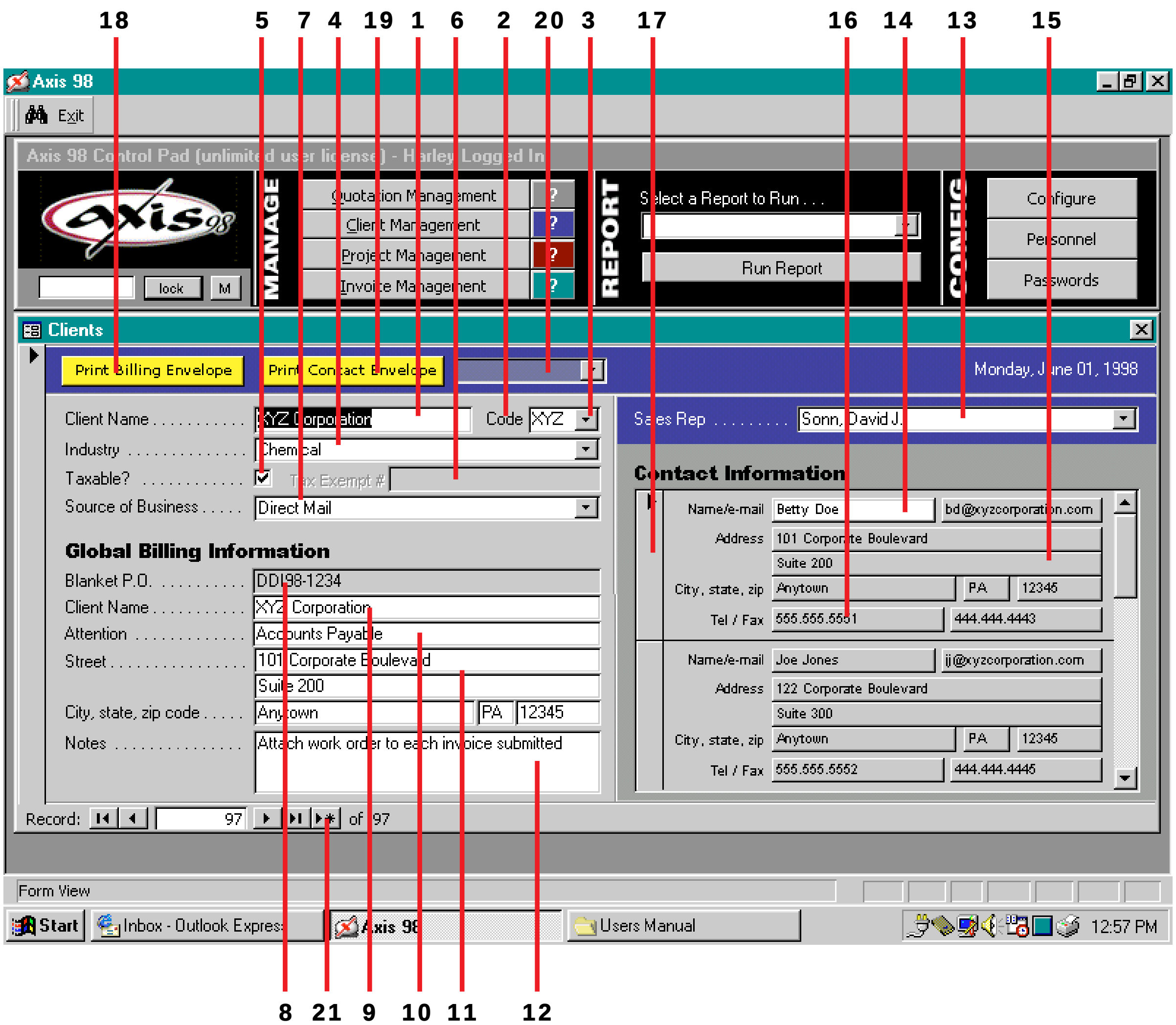
this individual to have access to. You will see a checkmark appear in the box denoting access to that area. Important **Note:** Under the section of Settings, only the company owner and/or general manager should have the Passwords Box checked on. This gives access to the main Passwords Button from the Control Pad. Anyone with this permission can get access to every part of the system, as well as change existing passwords, and could ultimately lock every one else out.

5. Now review which Reports you will give permission to access. Simply click on each report title, which will highlight it, to give access. The category headers, which are in all capital letters, serve only to categorize the various reports. These also need to be highlighted in order for them to appear in the Reports pulldown menu on the Control Pad. The same applies to the lines that separate each category. Note: Only the Reports that you grant access to will appear in the pull down menu.
6. After you finish assigning permissions, click the Save Properties Button to retain the selections you have made. To affect any changes throughout the system you must move forward or back to another Passwords Record before exiting the Passwords Screen.
7. To enter another password, click the new record button at the bottom and follow the same procedure.

Chapter 8: Client Management

The Client Management Screen is designed to enter and store all client information. Almost all other screens are dependent on this data. Following is a step-by-step description and usage of each feature of this section.

To begin, use the global Navigation Bar (21) at the bottom of the screen to create a new client record. Simply click on the ▸* button. See Chapter 3 for more details regarding the Navigation Bar.



1. Client Name: Enter the company name.
2. Code: Create a unique, 3-letter code in ALL CAPS for this client. Note: It is best to use the first three letters of the company name. If the company's name consists of multiple words, you can use the initials. The code should be easy to recognize and remember as to which client it represents.
3. Pulldown menu: This pulldown menu lists all codes currently in use. Consult this list to make sure the new code you are choosing hasn't already been assigned.

4. Industry: This pulldown menu lists all industry types previously created in the Configure Screen. Assign the client an industry type that best describes this client's business for future reporting and analysis purposes.
5. Taxable?: By clicking on the checkbox a checkmark will be displayed to denote that this client will be charged state sales tax. The default setting is checked off as being charged sales tax. Note: the sales tax percentage rate has already been entered in the Configure Screen.
6. Tax Exempt #: If the client should not be charged sales tax, i.e. nonprofit or a reseller, enter the client's Tax exempt #. This number is stored for reference purposes only. It will not be printed or displayed anyplace else throughout the system.
7. Source of Business: This pulldown menu lists all the means by which new clients can be obtained. This list has been previously created in the Configure Screen. Assign the client the vehicle that is responsible for initially generating this new source of revenue. This will be used for future reporting and analysis purposes.

Global Billing Information

8. Blanket P.O.: Enter any Blanket Purchase Order numbers or codes that the client has assigned you. This information will automatically appear on invoices and project cover sheets. It can be altered or even deleted if necessary in either the Project Management Screen or the Invoice Management Screen.
9. Client Name: Enter the company name to whom the invoices for this client should be sent.
10. Attention: Enter the person's name who should receive the invoice and will be responsible for payment. This could also be entered as a department name, such as Accounts Payable or Procurement Dept.
11. Street, City, State, Zip Code: Enter the mailing address for the recipient of the invoices.
12. Notes: This field is supplied to add any special notes about the client, billing procedures, etc. This information is displayed here only and will not be printed or displayed anyplace else throughout the system.
13. Sales Rep: This pulldown menu lists the names of all personnel entered in the personnel Screen. From this list, select the person's name in your company who is responsible for this client. By doing so, revenue generated from this client will be calculated into the amount of commission earned by this person. To appear in the Salespersons' Report (Chapter 12) this person must have been denoted as a commissioned salesperson in the Personnel Screen.

Contact Information

14. Name/e-mail: In the first field, enter the client contact person's name who is in charge of the project on the client side. In the next field, enter this person's e-mail address.
15. Address (City, State, Zip Code): Enter this person's exact address for delivery of projects.
16. Tel/Fax: Enter the direct dial phone number for this person in the first field. In the second field, enter the facsimile machine phone number that will be used to send proofs and/or correspondences to this person.

17. Record Selector: By clicking on this bar, you can select the entire record for this person. This will enable you to copy all the data in these fields to create another record for an additional contact person who may have similar information. Simply click the Record Selector and type Ctrl C. Scroll down to the last Record Selector labeled with a *. Click on this button and type Ctrl V. This will automatically duplicate all the previous data into a new record. Now replace with thenew contact name and make any other necessary alterations. You can also delete an entire contact person's record by clicking on the Record Selector and use the Del key.
18. Print Billing Envelope: To print an envelope using the Global Billing address, click on the Print Billing Envelope button. If you have selected the Preview Before Printing Envelopes option in the Configure Screen, the address will be displayed on screen only. You will then have the opportunity to type Ctrl P to configure the exact printer and tray you will be printing the envelopes from. If you have not selected this option in the Configure Screen, the address will automatically be printed using the default printer configuration.
19. Contact Name Pulldown Menu: This menu lists all the contact names for this client. When printing an envelope for a particular contact person you must first select the name from this list.
20. Print Contact Envelope: To print an envelope addressed to a specific contact person, click on the Print Contact Envelope button. You must have already selected the name in the pulldown menu beside of this button. If you have selected the Preview Before Printing Envelopes option in the Configure Screen, the address will be displayed on screen only. You will then have the opportunity to type Ctrl P to configure the exact printer and tray you will be printing the envelopes from. If you have not selected this option in the Configure Screen the address will automatically be printed using the default printer configuration.

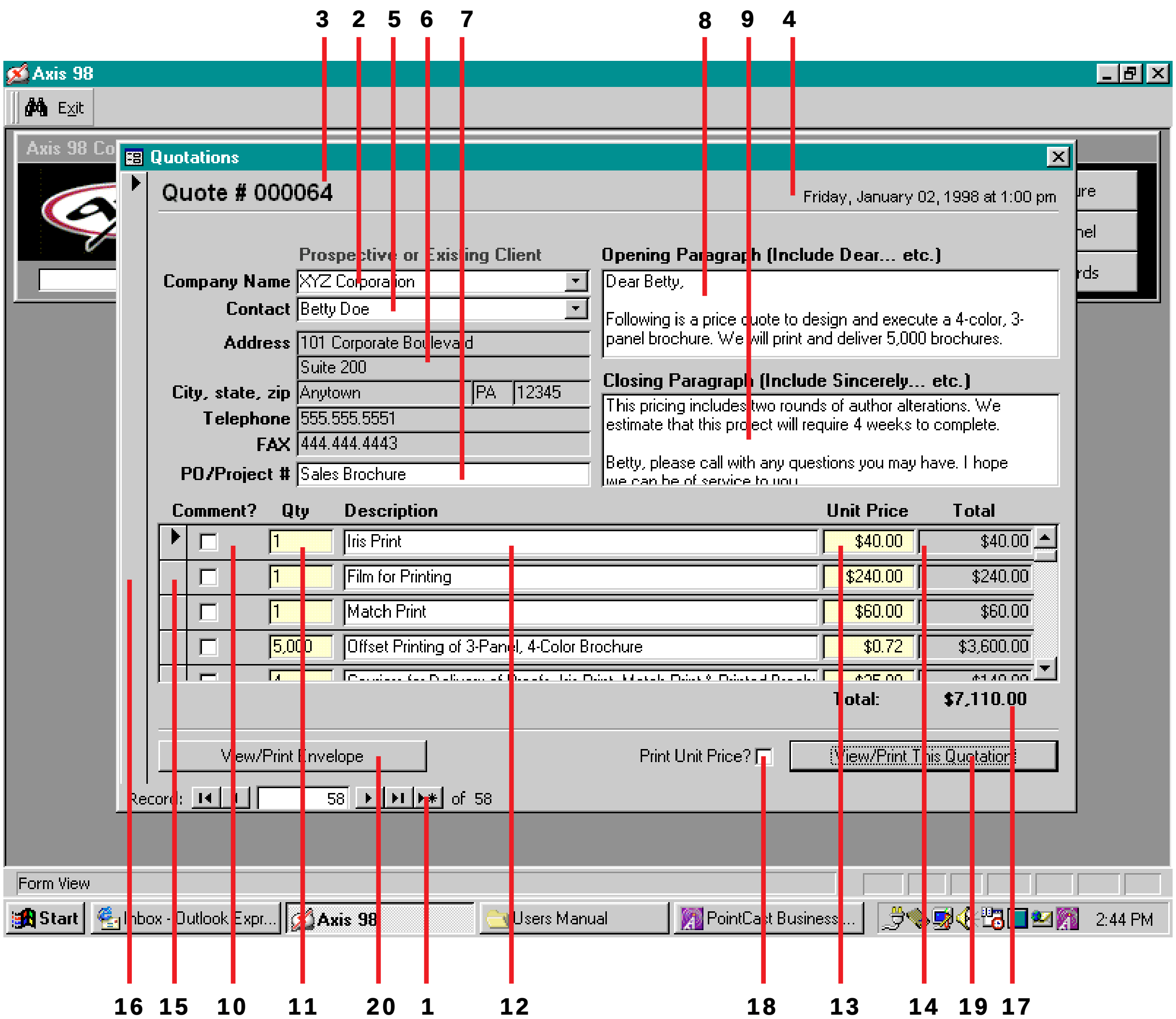
Once you have completed the record or just updating certain fields, you must move forward or back to another record to affect the change throughout the system. Once you have done so you can now go to the Project Management Screen to enter a new project for this client.

On the Control Pad there is a Blue Box located to the right of the Client Management Button. By clicking on this box, a help tour of the Client Management Screen will be displayed. This is provided as a quick reference until you are completely knowledgeable about the client management features of Axis 98.

Chapter 9: Quotation Management

The Quotation Management Screen provides an organized and professional means to calculate, print, store and track cost estimates. The completed data in this screen is designed to print on vertical 8.5” x 11” paper, specifically letterhead or a custom printed form, to provide a professional quotation for faxing or mailing.

Following is a step-by-step description and usage of each feature on this screen. To begin, use the global Navigation Bar (1) at the bottom of the screen to create a new Quotation Record. Simply click on the ▸* button. (See Chapter 3 for more details regarding the Navigation Bar.) This will display a new quote screen with blank fields.



2. Company: If the quote is for an existing client, select the company name from the pulldown menu. If it is for a company not in the system, simply type it in the provided field.
3. Quote #: As soon as you Tab from this field, Axis 98 will automatically generate the next numeric quote number available. This will be printed on the quote as a quick reference.

4. Date: Axis 98 will automatically display and print today's date on the quote. If you need to back date the quote, simply double-click the date field. Enter the desired date in the form of numbers and slashes, i.e. 5/14/98. Once entered, hit the Tab key and the altered date will be displayed.
5. Contact: If the quote is for a person in the system, simply select the name from the pulldown menu. If this is the case, next hit the Tab key and the corresponding address and phone and fax numbers will automatically be displayed. If the person's name is not in the system simply type it in this field.
6. Address & Contact Numbers: If the address and contact numbers are not already displayed, type the appropriate data in the provided fields. All of this information will be printed on the quote. The address data will also be used to print an envelope.
7. PO/Project #: Enter reference codes and/or descriptions in this field. This will be extremely useful for referencing previous or similar type quotes in the future.
8. Opening Paragraph: This field is designed to provide descriptive text about the project specifications and requirements in the form of a letter. Begin by entering "Dear" and the contact's name. Next, by using the Enter Key, add a couple of line spaces to separate the body copy. This text will be positioned above the pricing information on the printed quote.
9. Closing Paragraph: This field is designed for closing remarks and stipulations about the project. It can be ended with "Sincerely" and the author's name. **NOTE:** This paragraph is anchored to the bottom bar graphic and quotation totals of the line item section. If the there is too much content and text it will force the bottom portion of the pricing on to the next page. If this layout is unacceptable, do not include "Sincerely" and the author's name. If this doesn't bring it back to one page, make the text more concise.
10. Comment?:(Optional) By clicking on this checkbox, this line item will only print what you type in the Line Item field. You can add specific descriptions, codes and numbers. It will not print anything currently being displayed in any other field in this line. When the invoice is printed, this special notation will be dis played in a gray box. This will create the appearance of sections within the line items. (See sample quote at the end of this Chapter)
11. Qty.: In this field enter the number of items being charged on this line.
12. Line Item: Add text to accurately describe the items being billed and/or the services to be provided.
13. Unit Price: This field serves 2 purposes. It allows you display and store the unit price for each, single item in this line. Before printing, you will have the option whether or not to have this column of prices printed on this quotation. Secondly, this field serves as a built-in calculator. Once you enter the unit price value hit the Tab key. Axis 98 will automatically multiply the Unit Price by the value entered in the Qty. field and display the total cost in the Amount field.

14. Amount: This is the total cost for this line item. You can manually enter a value and alter the the value that previously was calculated. NOTE: After entering a value, you must always Tab to the next line in order to have this cost added to the total cost of the quotation. It is very important to remember to do this, especially on the last line item of the quotation. If you want to show a discount, credit or rebate, simply enter a separate line item and add a dash before the value in this field. Now hit the Tab key. You will see the value displayed in parentheses (), denoting a negative value, and the amount deducted from the total of the quotation.
15. Single Record Selector: If you incorrectly entered data or just need to delete an entire line, simply click on this button and use the Delete key. As a safeguard, you will be prompted by a dialog box to make sure you want to delete this. If there are similar line item(s) from a previous quotation you can cut and paste them into this current quotation. Simply click on this field in the previous quota tion and type Ctrl C. Multiple line items can be copied simultaneously by dragging the cursor across multiple buttons. Now click on this same field in the new quotation and type Ctrl V. A dialog box will ask you to confirm the pasting of these new items. Hit the Enter key to complete the transfer.
16. Record Selector: As previously discussed in Chapter 7: Client Management, the Record Selector allows you to delete or copy entire quotation records. Simply click on this bar. Then use the Del key to erase the entire quotation or type Ctrl C to copy this information to a new quotation. Follow the same steps as above for copying the data.
17. Total: The total dollar amount of this invoice. If you have included pricing on multiple options making the total amount irrelevant, highlight the number and delete it.
18. Print Unit Price?: If you click on this box, which will display a checkmark, the column of Unit Prices will be printed on the quotation. The default is set to not print this column.
19. View/Print This Quotation: Once you have entered all the necessary info, click on this button to print the quotation. You will first see a preview of the quota tion. You can eliminate the preview step by de-selecting the Preview Quotations Before Printing? option in the Configure Screen. This is not recommended how ever. Use the preview as a step to proof the quotation for complete accuracy and layout. By skipping the preview step, you will not be given the opportunity to chose a specific printer or tray. After previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the quotation. When finished printing click on the X Box in the upper right corner of the quotation preview. This will close the window and return to the Control Pad.

20. View/Print Envelopes: To print an envelope to mail the quotation to the contact person, simply click this button. The address will be previewed on the screen. After previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded envelopes in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the envelope. When finished printing, click on the X Box in the upper right corner of the envelope preview. This will close the window and return to the Control Pad.

On the Control Pad there is a Gray Box located to the right of the Quotation Management Button. By clicking on this box, a help tour of the Quotation Management Screen will be displayed. This is provided as a quick reference until you are completely knowledgeable about the quotation management features of Axis 98.

On the following page is an example of a printed Quotation.

Betty Doe
XYZ Corporation
101 Corporate Boulevard
Suite 200
Anytown, PA 12345

Friday, January 02, 1998

Tel 555.555.5551
FAX 444.444.4443

Dear Betty,

Following is a price quote to design and execute a 4-color, 3-panel brochure. We will print and deliver 5,000 brochures.

PO Project Number	Sales Brochure	Quote Number	000064

Quantity	Description	Amount
1	Conception & Design of 3-Panel, 4-Color Brochure	$3,000.00
6	Output Color Prints	$30.00
1	Iris Print	$40.00
1	Film for Printing	$240.00
1	Match Print	$60.00
5,000	Offset Printing of 3-Panel, 4-Color Brochure	$3,600.00
4	Couriers for Delivery of Proofs, Iris Print, Match Print & Printed Brochures	$140.00

Quotation valid for 60 Days
(Applicable tax is not included)

Total **$7,110.00**

This pricing includes two rounds of author alterations. We estimate that this project will require 4 weeks to complete.

Betty, please call with any questions you may have. I hope we can be of service to you.
Thank you.

Sincerely,

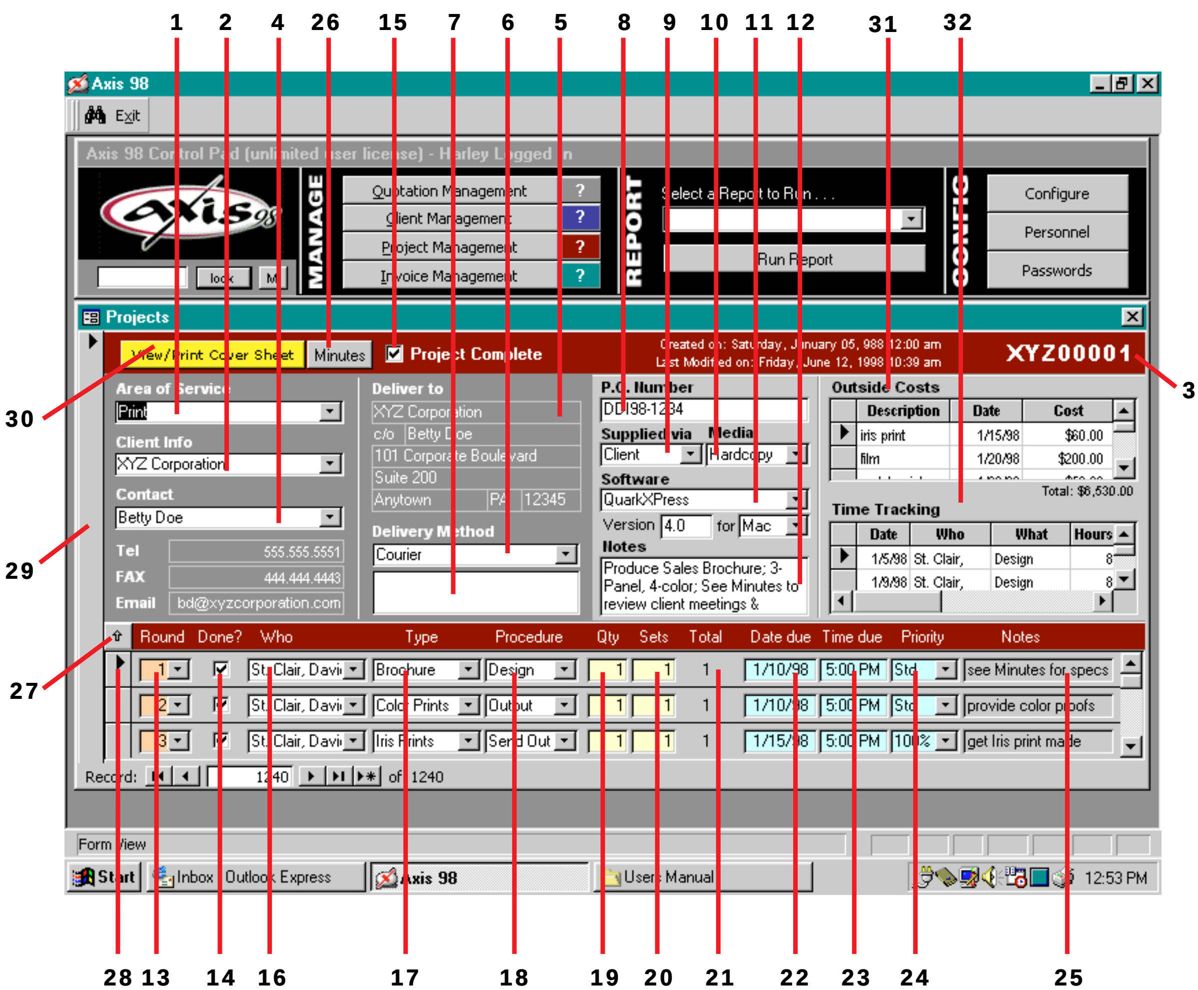
John Dawson

John Dawson

D&D Interactive, Inc.
215 North Presidential Blvd., Bala Cynwyd, PA 19004
p.610.667.4200 • f.610.667.5390 • www.ddii.com

CHAPTER 10: PROJECT MANAGEMENT

The Project Management Section is designed to organize each project by generating a unique code, adding descriptions and due dates for all stages of the project. It also provides a means to log all labor and outside costs necessary to complete the project. Once all necessary information is entered, a well organized project cover sheet can be printed. This cover sheet can be attached to a folder containing project materials. This will aid in organizing and trafficking of each project.



Following is a step-by-step description and usage of each feature on this screen. To begin, use the global Navigation Bar at the bottom of the screen to create a new project record. Simply click on the ▸* button. (See Chapter 3 for more details regarding the Navigation Bar.)

1. Area of Service: From the preconfigured list of Area of Service, select the label that most closely defines the majority of this project. This labeling is used in future financial reports and analysis. If the project contains a variety of tasks that are different from each other, the tasks should be assigned separate project numbers. For example, if a client asks for a printed brochure to be designed from which a web site is to be developed, the brochure and the web site should be logged in as separate projects. By doing so, the financial reporting will be that much more accurate.

2. Client Info: From the pulldown list of clients previously entered into Axis 98, select the client that this project is for. If the company is not in the list, it must first be entered into the Client Management Screen. After the client is selected, Tab to the next field. Axis 98 will automatically generate and display a unique project number (3). This number will begin with the three letter code previously assigned to this client and then is proceeded by the next highest available, five digit number for this client. The numbering is separate for each client in that the first project for each client will be _ _ _00001.
4. Contact: This pulldown menu lists all the possible contact names for this client. If the person is not in the list, the name and contact information must be added to the client record in Client Management. After a name is selected, Tab to the next field. Axis 98 will automatically display the telephone number, fax number, e-mail and delivery address for this person.
5. Deliver To: Although this information is automatically generated according to the contact person's data, you can alter it by highlighting the desired fields and just type over it. Doing so will only affect this project.
6. Delivery Method: This pulldown menu lists all the possible delivery methods that have been previously entered in the Configure Screen. Select the method by which the project is to be delivered. If the specific method does not currently exist in the list go to the Configure Screen and add it. This will automatically shut the Project Management Screen. Once you re-open this screen, the new delivery method you have added will appear in the list. This procedure can be used for all the customizable lists in the Configure Screen.
7. Blank field: This field is intended for delivery notes and/or client Fed Ex account numbers. Simply type the desired information.
8. P.O. Number: Any blanket purchase order numbers or codes entered for this client in the Client Management Screen will automatically appear in this field. If additional or different information needs to be added, simply click in the field and begin typing. When the project is to be invoiced, this information will automatically appear in the P.O. Number box on the invoice.
9. Supplied Via: This pulldown menu lists all the possible delivery methods by which a client can provide materials for this project. Select the method by which the materials are to be supplied. This menu uses the exact same list as the Delivery Method pulldown menu. Therefore, if the specific method does not currently exist in the list go to the Configure Screen and add it. This will automatically shut the Project Management Screen. Once you re-open this screen, the new entry will appear in the list. This procedure can be used for all the customizable lists in the Configure Screen.
10. Media: This pulldown menu lists all the possible types of communication and storage devices by which the client can provide files and materials for the project. Select the media type by which the materials are to be supplied. If the specific media type does not currently exist in the list go to the Configure screen and add it. This will automatically shut the Project Management Screen. Once you re-open this screen, the new entry will appear in the list. This procedure can be used for all the customizable lists in the Configure Screen.

11. Software, Version and Platform: These pulldown menus list possible types of software and platforms to be used to complete projects. The version number must be entered manually by clicking in the field and typing it in. This information will inform the production department what software should be used. If a project is strictly outputting from client supplied files, these 3 fields are used to denote what software the client has used. Select the appropriate data. If the specific software does not currently exist in the list go to the Configure Screen and add it. This will automatically shut the Project Management Screen. Once you re-open this screen, the new entry will appear in the list. This procedure can be used for all the customizable lists in the Configure Screens.
12. Notes: This field is supplied to add any special instructions about the project, files, etc. This information displayed here will also be printed on the project cover sheet.

Project Information

13. Round: This pulldown menu is a listing of numbers (1 - 15) to denote various and unique stages of the project. As a short cut simply click in the field and type the desired Round #.
14. Done?: By clicking on this box a checkmark will appear to denote that this Round has been completed. This field also affects the Unfinished Projects Report (Chapter 12). All Rounds from all projects that do not have this box checked will appear in this report.
15. Project Complete: This box is similar to the Done? field previously described. Once the project is absolutely completed, select the checkmark for this box and each unselected Done? boxes will be checked off automatically. This will remove this entire project from the Unfinished Projects report. Once a project is invoiced, Axis 98 will automatically check off this box in case it was missed.
16. Who: From the pulldown menu you can assign a specific person the tasks of each Round.
17. Type: This is the description of the product or service to be completed for each Round (a noun). This pulldown menu lists all the possible products that your company offers. If the specific product does not currently exist in the list, go to the Configure screen and add it. This will automatically shut the Project Management Screen. Once you re-open this screen, the new entry will appear in the list. This procedure can be used for all the customizable lists in the Configure screen.
18. Procedure: This can best be described as the action (or verb) that needs to be executed to complete the Item previously selected. This gives the person assigned the project a quick idea of the task. It will will provide a quick reference of how much time must be allocated to complete each Round. Also, it will give a description for billing rates. If a certain procedure does not currently exist in the list go to the Configure screen and add it. This will automatically shut the Project Management Screen. Once you re-open this screen, the new entry will appear in the list. This procedure can be used for all the customizable lists in the Configure screen.

19. Qty: This field is used to type a numeric quantity of unique Items in this Round. For example: If "Slides" is entered in the Item field and Output is entered for Procedure, the Qty would designate how many individual slides are to be output.
20. Sets: This field is used to type a numeric notation of how many sets of the original quantity is required. If the client requests a total of 5 sets of Slides this is where you would type the number 5.
21. Total: After you enter a numeric value in the Sets field, simply Tab to the Total field. Axis 98 will automatically multiply the value in the Qty field with the value in the Sets field and display the total.
22. Date Due: Click in this field to enter the month and day that each round must be completed. You must add a slash between the month and day. Axis 98 will automatically display the year.
23. Time Due: Click in this field to enter the time of day that each Round must be completed. You must add AM or PM. Axis 98 will default to 5:00 PM.
24. Priority: This pulldown menu, which can be altered in the Configure Screen, designates the priority by which each Round needs to be completed. This description can denote whether or not these tasks incur additional "Rush" charges or qualify for a predetermined Economy savings rate. It will default to Std (Standard turnaround) if you Tab through this field. When it's time to invoice the project, Axis 98 will display the priority type in each line item as a reminder of special billing rates.
25. Notes: Click in this field to type specific descriptions and instructions for each round.
26. Minutes: To provide and record additional instructions and client meetings, click on the Minutes Button. A separate pop-out window will appear. The current date and time will be displayed, which can be altered if necessary to organize all entries chronologically. From the pulldown list choose your name. Now proceed to enter detailed instructions, highlights of client meetings, document client conversations and directions, etc. You may want to type "See Minutes" in the Notes field to direct the person assigned to the project. The minutes page can be viewed on screen or printed out and placed in the project folder. It will be printed to your default printer unless you specify otherwise.
27. Max. Round View: By clicking on this up arrow button you can easily view up to 10 Rounds simultaneously. To return to the minimized (standard) view, click the the button which will now be displaying a down arrow.
28. Single Record Selector: If you incorrectly entered data or just need to delete an entire Round, simply click on this button and use the Delete key. As a safeguard, you will be prompted by a dialogue box to make sure you want to delete this.
29. Record Selector: As previously discussed in Chapter 7: Client Management, the Record Selector allows you to delete or copy entire project records. Simply click on the bar to perform the desired function.
30. View/Print Cover Sheet: Once you have completed entering all the necessary info click the yellow View/Print button to print the cover sheet. You can eliminate the view step by de-selecting the Preview Cover Sheets Before Printing? option in the Configure Screen. By doing so the cover sheet will automatically print to your default printer as soon as you click on the yellow button.

Advanced Features

Axis 98 is structured so that you can account for and calculate extra Outside Costs. These Outside Costs are defined as additional expenditures absorbed by the company that detract from the profitability of a project. Examples are as follows: Couriers, Fed Ex, printing, photography, freelance employees, etc. Any additional services the Company must pay for that are above and beyond normal materials. These items are left to the discretion of the business owner or general manager.

The business philosophy of Axis 98 is to determine the Net Revenue of a project (Invoice Total less Outside Costs and sales tax) and to pay sales commissions and profit sharing on this total. Due to its importance from a financial standpoint, Net Revenue is always shown in all financial reports. This illustrates a truer picture when determining profitability. For example, you have a project to design a brochure and are required to get 100,000 of them printed. Your design fees total $3,000 and your print bill totals $70,000, which you then add a 10% mark up of $7,000. The invoice total (before sales tax) adds up to $80,000. Axis 98 would should show a Net Revenue of $10,000. This is the real number of importance. It would not be profitable to pay commission and profit sharing on $80,000 but rather $10,000.

31. Outside Costs: To track these costs, click on the description field and type the source of additional fees. Tab to the Date field to enter to the date of the service (it will default to today's date). Next Tab to the Cost Field. Type in the dollar amount of the expenditure. When finished, Tab again and Axis 98 will display the total amount of all Outside Costs for this project. When it comes time to invoice this project, the Outside Costs will be carried through and displayed in the Invoice Management Screen. These fees are what determine the Net Revenue.

32. Time Tracking: This area allows the user the ability to track the time spent by anyone in the Personnel pulldown list. Simply place the the cursor in the date field to begin. If the labor occurred on today's date simply tab to the next field. If the hours were accrued on a previous date alter the date displayed. Next, select Who spent the hours on this project. Next, select the type of labor per formed (the verb) in the What field. Lastly, enter the number of hours spent, which can be in the form of a decimal (i.e. 5.5, 5.25, etc.), in the Hours field. The number of hours will be multiplied by the hourly rate previously entered in the Personnel screen and stored as a dollar amount. For confidentiality purposes, this dollar amount (and the person's hourly rate) will not be displayed anyplace in the Project Management Screen. Once you are ready to invoice this project, Axis 98 will list and total the dollar amounts accrued with this project. Here the hourly rates will also be displayed. From the hours logged for each individual, Axis 98 will generate the Hourly Employee Wages Report (Chapter 12). This report will calculate the compensation due to each freelancer and/or hourly employee.

On the Control Pad there is a Red Box located to the right of the Project Management Button. By clicking on this box, a help tour of the Project Management Screen will be displayed. This is provided as a quick reference until you are completely knowledgeable about the project management features of Axis 98.

On the following page is a sample print of a Project Cover Sheet.

Print
Sales Rep: Sonn, David J.

XYZ00001

Created on: Saturday, January 5,988 at 12:00 am
Last Modified on: Friday, June 12,1998 at 10:39 am

☑ Job Done?

Client Information

XYZ Corporation

Contact	Betty Doe
Telephone	555.555.5551
Fax	444.444.4443
Email	bd@xyzcorporation.com

Delivery Information

XYZ Corporation
c/o Betty Doe
101 Corporate Boulevard
Suite 200
Anytown, PA 12345

Courier

Job Information

Files delivered to us via Client, method: Hardcopy

Files are primarily created with QuarkXPress 4.0 on a Mac

P.O. Number: DDI98-1234

Notes

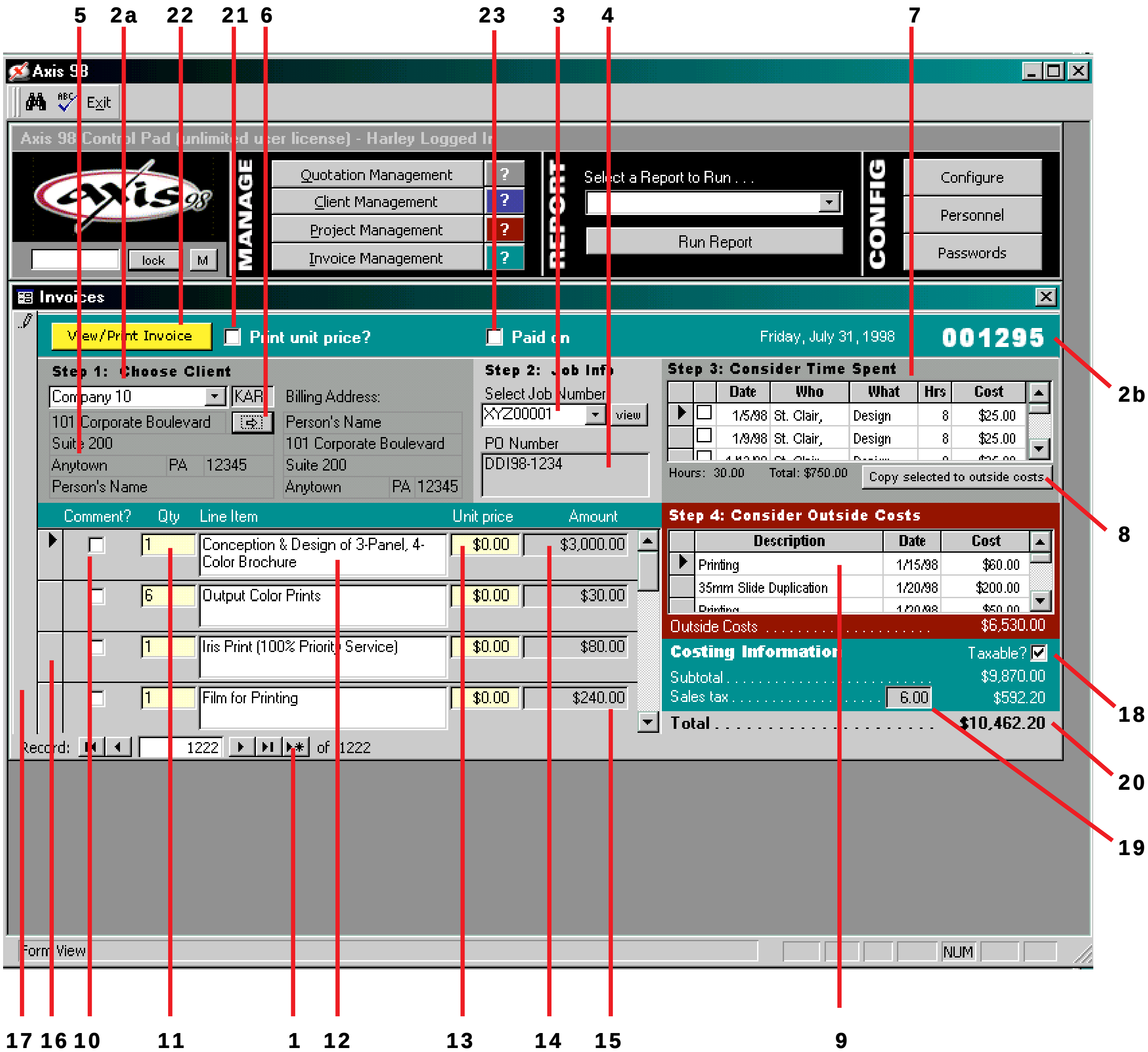
Produce Sales Brochure; 3-Panel, 4-color; See Minutes to review client meetings & requirements

Round	Status	Done	Who	Type	Procedure	# Orig	# Sets	Total	Date Due	Time Due	Priority	Notes
1		☑	St. Clair, David	Brochure	Design	1	1	1	1/10/98	5:00 PM	Std	see Minutes for specs
2		☑	St. Clair, David	Color Prints	Output	1	1	1	1/10/98	5:00 PM	Std	provide color proofs
3		☑	St. Clair, David	Iris Prints	Send Out	1	1	1	1/15/98	5:00 PM	100% Prio	get Iris print made
4		☑	St. Clair, David	Film	Send Out	1	1	1	1/20/98	5:00 PM	Std	have film made
5		☑	St. Clair, David	Match Print	Send Out	1	1	1	1/20/98	5:00 PM	Std	send match print to client
6		☑	St. Clair, David	Brochure	Offset Printing	1	5,000	5,000	2/1/98	5:00 PM	Std	use ABC printing co.
7		☑	St. Clair, David	Brochure	Offset Printing	1	5,000	5,000	2/10/98	5:00 PM	Std	brochures for Dallas office

CHAPTER 11: INVOICE MANAGEMENT

The Invoice Management Screen is the financial center of Axis 98. This area is designed to retrieve all data associated with a particular project in order to calculate and print professional invoices. Once all necessary descriptions and fees are entered, Axis 98 will store this data for future financial reports. The completed data in this screen is designed to print on vertical 8.5" x 11" paper, specifically letter-head or a custom printed form, to provide a professional invoice for mailing.

Following is a step-by-step description and usage of each feature on this screen. To begin, use the global Navigation Bar (1) at the bottom of the screen to create a new invoice record. Simply click on the ▸* button. (See Chapter 3 for more details regarding the Navigation Bar.) This will display a new, blank invoice screen.



2a. Client Field: From the pulldown list of clients, select the client for whom the project is to be invoiced.

2b. As soon as you Tab from this field, Axis 98 will automatically generate the next numeric invoice number available.

3. Select Job Number: From the pulldown list of project codes, select the project to be invoiced or simply click in the field and type the code. When finished hit the Tab key. Axis 98 will automatically fill in the contact name and addresses fields.

4. P.O. Number: The cursor will now appear in the P.O. Number field. This may already be filled with information previously entered in the Client and/or Project Management Screens. If not, you may type in any necessary information.

5. Addresses: Review the contact names and addresses currently being displayed. The address and contact name displayed on the left is being retrieved from the actual project. The Billing Address and contact is being retrieved from the billing information entered in the Client Management Screen. Each of these fields can be altered if necessary by simply clicking in the field and typing in new data.

6. Arrow Button: If you would like to copy the address and contact information from the left side into the Billing Address fields click this button. This will be helpful if the invoice needs to be sent directly to the client instead of a different department.

7. Consider Time Spent: Any labor data that was entered in the Project Screen will automatically be displayed with the associated costs. If there were additional hours not logged they can be entered now. At the bottom of the fields, Axis 98 will display the total number of hours logged as well as the total costs. If you would like any of these fees deducted as Outside Costs (such as freelancer fees) simply click in the box on the right side of each line item.

8. Copy Selected to Outside Costs: When you have finished selecting all the desired items as Outside Costs, click this button to automatically copy the items and costs to the Outside Costs fields. These items will be displayed as Labor Costs. These fees will automatically be added to the Outside Costs total. Since these copied items and fees are now deemed as Outside Costs they will directly affect the Net Revenue calculations in the financial and compensation reports.

9. Consider Outside Costs: This section will display all items, deemed as Outside Costs, that were entered in the Project Management Screen. If there are additional items to be added, simply click in a blank Description field and type the item and its cost. Axis 98 will automatically update the total for all Outside Costs. This total, subtracted from the Subtotal, will determine the Net Revenue of this invoice.

Now that you have finished entering labor and outside fees, review these items to see what needs to incorporated into the actual invoice. Go to the fields that you will customize Line Items of tasks and fees.

10. Comment?: (Optional) By clicking on this checkbox, only the text you type in the Line Item field will actually print on the invoice. You can add specific descriptions, codes and numbers to clarify or categorize the Line Item charges beneath it. It will not print anything currently being displayed in any other field in this line. When the invoice is printed, this special notation will be displayed in a gray box.

11. Qty.: In this field enter the number of items being charged on this line.
12. Line Item: Notice that Axis 98 has already pulled the Procedures, Project Types and Priority for each Round from the actual project record. This information, which is meant as a guide, can be edited. Alter the text if necessary to accurately describe the items being billed.
13. Unit Price: This field serves 2 purposes. It allows you display and store the unit price for each, single item in this line. Before printing, you will have the option whether or not to have this column of prices printed on this invoice. Secondly, this field serves as a built-in calculator. Once you enter the unit price value hit Tab. Axis 98 will automatically multiply the Unit Price by the value entered in the Qty. field and display the total cost in the Amount field.
14. Amount: This is the total cost for this line item. You can manually enter a value or alter the the value that previously was calculated. NOTE: After entering a value, you must always Tab to the next line in order to have this cost added to the total cost of the invoice. It is very important to remember to do this, especially on the last line item of the invoice.
15. If you want to show a discount or previously paid amount, simply enter a separate line item and add a dash before the value in the Amount field. Now hit the Tab key. You will see the value displayed in parentheses (), denoting a negative value, and the amount deducted from the total of the invoice.
16. Single Record Selector: If you incorrectly entered data or just need to delete an entire line, simply click on this button and use the Delete key. As a safeguard, you will be prompted by a dialog box to make sure you want to delete this.
17. Record Selector: As previously discussed in Chapter 7: Client Management, the Record Selector allows you to delete or copy entire invoice records. Simply click on the bar to perform the desired function.
18. Taxable?: If for any reason you are directed to charge or not charge sales tax on this invoice, you can click on the checkbox. If a checkmark is displayed, tax will be charged. No checkmark, no tax.
19. If for any reason you need to customize the tax percentage for this particular invoice, you can do so, by selecting the value in this field and typing the desired rate. Next, hit TAB to calculate the new rate.
20. Total: The total dollar amount of this invoice.
21. Print Unit Price?: If you click on this box, which will display a checkmark, the column of Unit Prices will be printed on the invoice. The default setting is to not print this column.

22. View/Print Invoice: Once you have completed entering all the necessary info click the yellow View/Print Button to print the invoice. You will first see a preview of the invoice. You can eliminate the view step by de-selecting the Preview Cover Sheets Before Printing? option in the Configure Screen. This is not recommended however. Use the preview as a step in which you proof the invoice for complete accuracy. Also, you will not be given the opportunity to chose a specific printer or tray. Once you are satisfied with the invoice, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the invoice. When finished printing, click on the X Box in the upper right corner of the invoice preview. This will close the window and return to the Invoice Management Screen.

To print envelopes for these invoices, you must go to the Client Management screen.

23. Paid on: After you receive payment, come back to the screen with this invoice number. Click on the checkbox to display a checkmark. Axis 98 will record the invoice as being paid and will display today's date after Paid on. By marking an invoice as being paid, it will affect several reports. It will remove this invoice from the Unpaid Invoices report and add it to the Employee Profit Sharing, Salespersons' Commissions and Receivables and Taxes Collected reports. (Chapter 12)

On the Control Pad there is a Green Box located to the right of the Invoice Management Button. By clicking on this box, a help tour of the Invoice Management Screen will be displayed. This is provided as a quick reference until you are completely knowledgeable about the invoice management features of Axis 98.

On the following page is a sample invoice for your review.

D&D INTERACTIVE

Invoice Number	001295

Bill To	Sold To
Person's Name Company 10 101 Corporate Boulevard Suite 200 Anytown, PA 12345	Person's Name Company 10 101 Corporate Boulevard Suite 200 Anytown, PA 12345

Date	Friday, July 31, 1998	Project #	XYZ00001

PO Number / Notes	DDI98-1234

Quantity	Description	Amount
1	Conception & Design of 3-Panel, 4-Color Brochure	$3,000.00
6	Output Color Prints	$30.00
1	Iris Print (100% Priority Service)	$80.00
1	Film for Printing	$240.00
1	Match Print	$60.00
5,000	Offset Printing of 3-Panel, 4-Color Brochure	$3,600.00
4	Couriers for Delivery of Proofs, Iris Print, Match Print & Printed Brochures	$140.00
	Brochures for Dallas Office - Bill to DDI98-1235	
5,000	Offset Printing of 3-Panel, 4-Color Brochure	$3,600.00
1	Shipping	$120.00
	Credit of Previously Paid Deposit	($1,000.00)
	Subtotal	$9,870.00
	Sales Tax	$592.20
	Total	$10,462.20

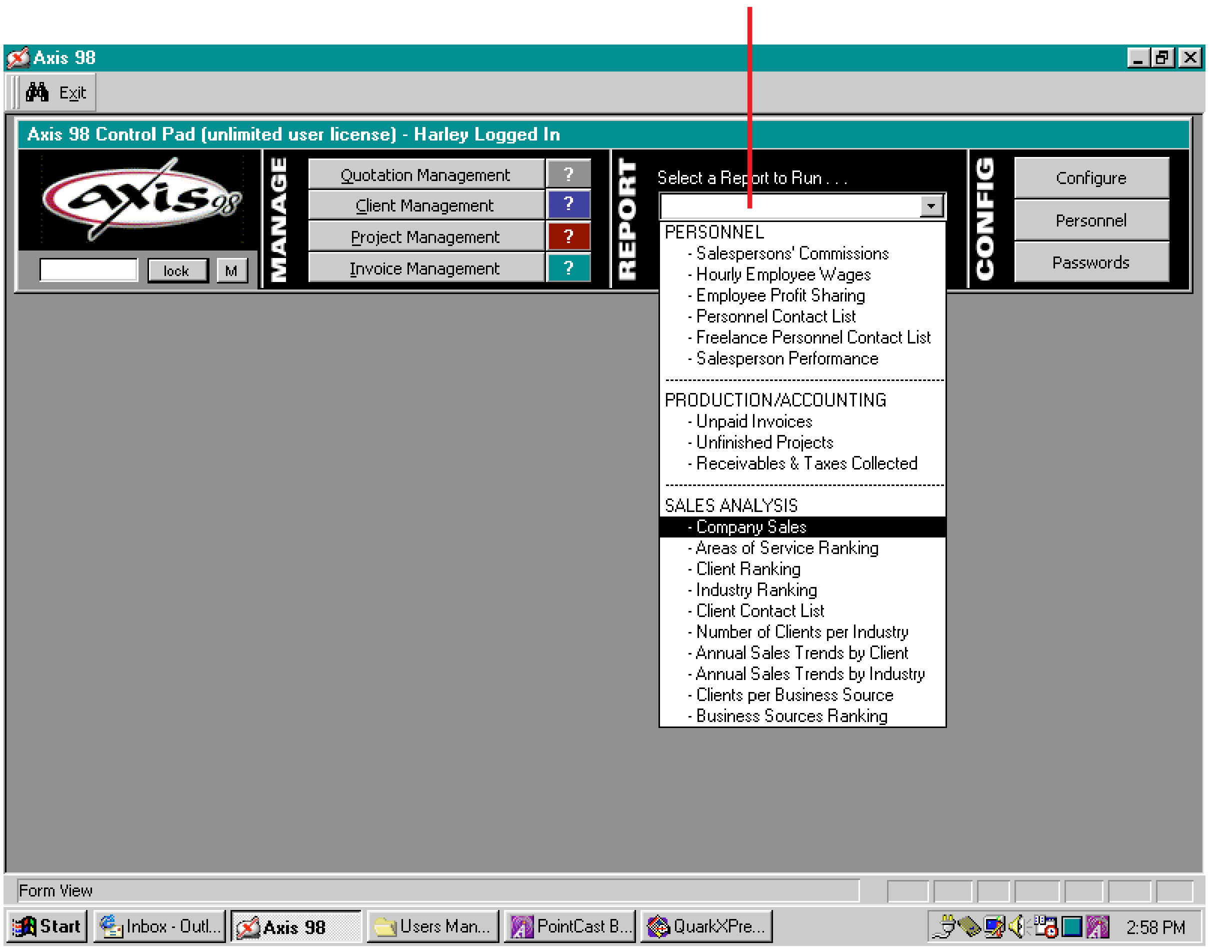
Terms: 30 Days

D&D Interactive, Inc.
215 North Presidential Blvd., Bala Cynwyd, PA 19004
p.610.667.4200 • f.610.667.5390 • www.ddii.com

CHAPTER 12: REPORTS

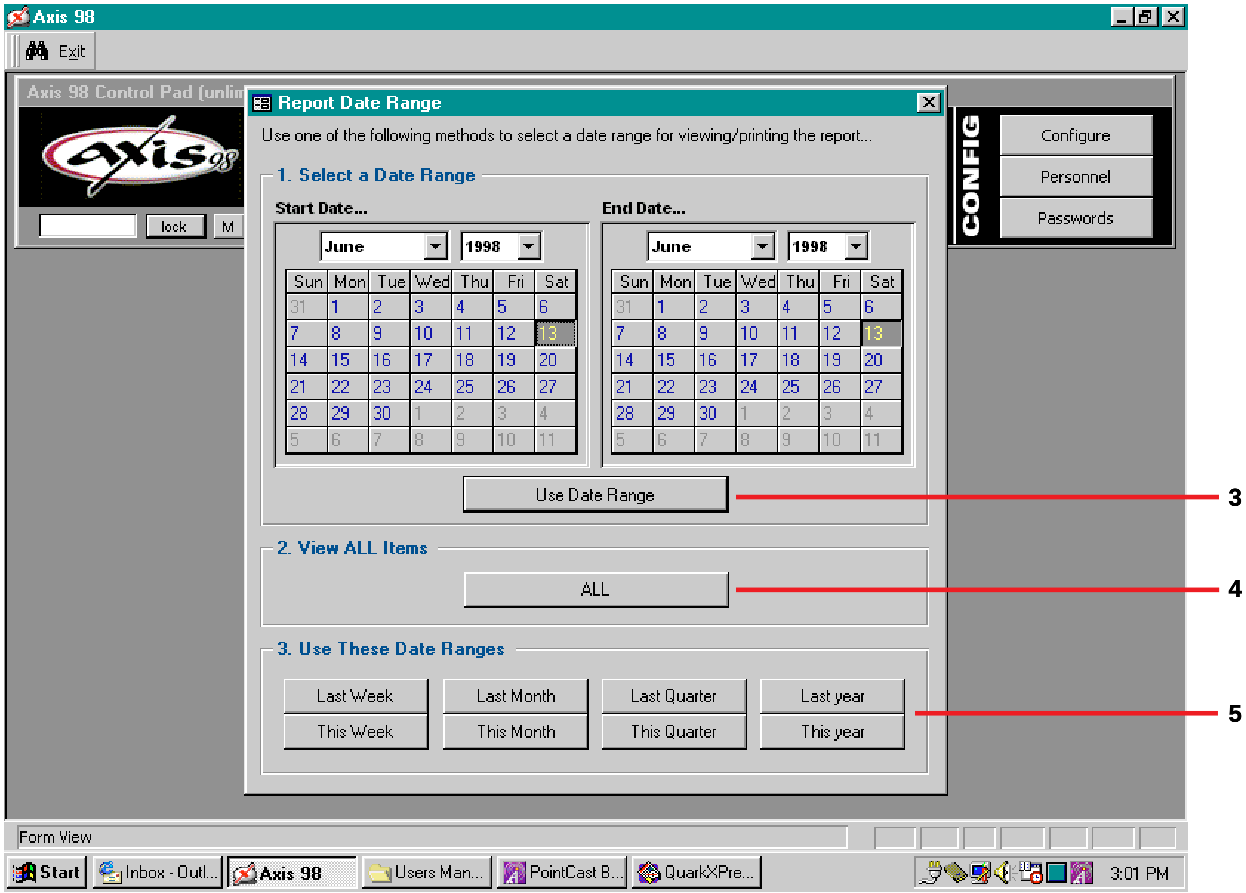
By entering data in various fields throughout the system, Axis 98 will automatically generate reports that will streamline your business practices, manage personnel and allow you to analyze the financial structure of your company. Following are detailed descriptions, procedures and uses of these reports. After these descriptions, procedures for previewing and printing will be detailed. In the next chapter there is an example of each report shown for your review.

1



1. From this pulldown list in the Report section of the Control Pad, select the report that you choose to view. The report title should now be visible in the window.
2. Run Report: To view the selected report, click the Run Report button. If this a date specific report, you will now see a menu to select the desired date range. A complete guide to utilizing these reports will follow these instructions.

3. You can tailor the report to an exact, specific time period by using the Date Range calendars at the top of the screen. From the month and year pulldown menus, select the desired start month and year. Next click on the start day on the calendar. You will notice that the end date on the adjoining calendar will automatically default to exactly two weeks later. This is set up this way because



most companies use two week pay periods. This is a built-in shortcut for running reports regarding wages, commissions and profit sharing. Select the desired month, year and day for the end date. Once the dates are set, click the Use Date Range Button to run the report. If you have selected “Preview Reports Before Printing” in the Configure Screen you will first see a preview of the report. When ready to print, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

4. Click the ALL Button to retrieve all data ever entered in the system pertaining to this report.

5. You can also use the preset short cut date ranges provided as buttons at the bottom of the screen. The same printing procedures apply.

Report Title: Salespersons' Commissions

Description:

This report is a calculated listing and total of the commissions earned by each salesperson in any given date range. It will show the commission earned on each invoice that was paid in the specified date range.

Purpose:

This report provides an accurate means to quickly calculate the total commission compensation each individual salesperson is due in any given date range. This report can then be given to each salesperson as a record of what invoices they are receiving commissions on, as well as how much commission they will receive in their paycheck. Each salesperson's report is constructed on a separate page for easy, confidential distribution.

Determining Data Fields:

When a person's name is initially entered in the Personnel Screen, they need to be labeled as a Commissioned Sales Rep under Type to appear in this report. The Commission % will be the rate at which the commission is calculated. When a new client is entered in the Client Management section, a salesperson's name is selected from the pulldown menu. Each client should have a salesperson assigned to it. This designated salesperson tag stays with the client through projects and invoices. The commission will not show up in the report until the invoice is marked as being paid by selecting the Paid On box in the Invoice Management Screen. Note: Any expenses entered into the Outside Costs fields, in both the Project Management or the Invoice Management Screens, such as printing costs, outside vendors or couriers will be deducted from the invoice subtotal. These expenses, labeled as Outside $ on this report, are subtracted from the Subtotal. This total, referred to as Net Total, is the dollar amount from which the commission is calculated. The sales tax added to the invoice is also deducted from the Net Total so that commission is not being paid on the sales tax.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Salespersons' Commissions Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now calculate the commission reports for each salesperson. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure screen, the reports will be displayed on your screen as a preview. Otherwise, the reports will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the navigation buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the invoice. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Hourly Employee Wages

Description:

This report is a listing of the total hours accrued by each individual over any selected date range broken down by time spent on each particular project. These hours are automatically multiplied by the individual's hourly rate, to calculate the compensation earned by each person.

Purpose:

This report provides an accurate means to quickly calculate the compensation of each hourly employee in any given date range. This report can be valuable for tracking the hours and compensation of freelance employees that may vary dramatically from pay period to pay period. By running this report for the entire year, you will be able to determine which freelancers have earnings that will require a 1099 Tax Form. Each individual's report is constructed on a separate page for confidential distribution.

Determining Data Fields:

When a person's name is initially entered into Axis 98 in the Personnel Screen, they need to be labeled as Hourly/Freelance under Type to appear in this report. The dollar value entered in the Hourly Pay Rate field in the Personnel Screen is used to calculate the individual's earnings. To correctly use this report, an individual's hours need to be entered in the Time Tracking fields in the Project Management Screen.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Hourly Employee Wages Report. Once it is showing in the pulldown window, click on the Run Report Button. This will open up a window from which you can enter any specific date range or the option to one of the preset time periods at the bottom. Axis 98 will then calculate the compensation for each person. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the reports will be displayed on your screen as a preview. Otherwise, the reports will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Employee Profit Sharing

Description:

If you currently offer or are considering offering a profit sharing bonus to your employees, this report will assist you. Whether you choose a monthly, quarterly or annual disbursement, Axis 98 will calculate a bonus percentage from the Net Revenue of all paid invoices. This report is very similar in structure and content to the Salespersons' Commissions Report.

Purpose:

This report provides an accurate means to quickly calculate the Profit Sharing each individual is due in any given date range. This report can then be given to each person as a record of what invoices they are receiving Profit Sharing from, as well as how much Profit Sharing they will receive in their paycheck. Each person's report is constructed on a separate page for easy, confidential distribution.

Determining Data Fields:

When a person's name is initially entered in the Personnel Screen, there is a field labeled as "Profit Sharing %". This is where the bonus percentage for each individual is entered. If you choose not to offer profit sharing to a particular individual or anyone in your company, simply enter 0. This field cannot be left blank. Profit sharing from each invoice will not show up in the report until the invoice is marked as being paid by selecting the Paid On Box in the Invoice Management Screen. Note: Any expenses entered into the Outside Costs fields, in both the Project Management or the Invoice Management Screens, such as printing costs, outside vendors or couriers will be deducted from the invoice subtotal. These expenses, labeled as Outside $ on this report, are subtracted from the Subtotal. This total, referred to as Net Total, is the dollar amount from which the Profit Sharing is calculated. The sales tax added to the invoice is also deducted from the Net Total so that Profit Sharing is not being paid on the sales tax.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Employee Profit Sharing Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now calculate the Profit Sharing reports for each person. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the reports will be displayed on your screen as a preview. Otherwise, the reports will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Personnel Contact List

Description:

This report is a complete listing of contact information for all employees except those denoted as freelancers. It provides phone numbers, addresses and special notes.

Purpose:

This report provides an organized listing and printout of contact information for all employees. In the event of an emergency, special scheduling and contact outside of the workplace, this report serves as an easy reference.

Determining Data Fields:

The Personnel Contact List Report derives all its data from the Personnel Screen. As you enter a person's name and relevant information, they will automatically be added to this report. The Personnel Screen also provides a Notes field to enter special info, such as available hours, additional phone numbers and skills that can be very helpful. Note: In the Personnel Screen there are also fields for Birthday and Social Security #. The data in these fields will not appear on this or any other report.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Personnel Contact List Report. Once it is showing in the pulldown window click on the Run Report Button. This will automatically generate the report. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on your screen first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Freelance Personnel Contact List

Description:

This report is a complete listing of contact information for only freelance employees. Just like the Personnel Contact List described previously, it provides phone numbers, addresses and special notes.

Purpose:

This report provides an organized listing and printout of freelancers' contact information in the event of an emergency, special scheduling and contact outside of the workplace.

Determining Data Fields:

The Freelance Personnel Contact List Report derives all its data from the Personnel Screen. To be included in this report the Freelancer? checkbox must be selected. As you enter a person's name and relevant information, they will automatically be added to this report. The Personnel Screen also provides a Notes field to enter special info, such as available hours, additional phone numbers and skills that can be very helpful. Note: In the Personnel Screen there are also fields for Birthday and Social Security #. The data in these fields will not appear on this or any other report.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Freelance Personnel Contact List Report. Once it is showing in the pulldown window click on the Run Report Button. This will automatically generate the report. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on your screen first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Salespersons' Performance

Description:

This report is a list of revenue generated by all Commissioned Sales Reps in any given date range. Specifically, it will show the number of projects completed and more importantly the Gross and Net Revenue in the specified date range.

Purpose:

This report provides a quick overview and comparison to analyze the success, profitability and workload of each salesperson. This report can be used as a means of tracking sales quotas, bonus structures and contests. Depending on what your company deems as "Outside Costs", Net Revenue is a better measurement when analyzing a salesperson's profitability.

Determining Data Fields:

When a person's name is initially entered in the Personnel Screen, they need to be labeled as a Commissioned Sales Rep under Type to appear in this report. When a new client is entered in the Client Management section, a salesperson's name is selected from the pulldown menu. Each client should have a salesperson assigned to it. This designated salesperson tag stays with the client through projects and invoices. The revenue will not show up in this report until the invoice is marked as being paid by selecting the Paid On box in the Invoice Management Screen. Gross Revenue on this report refers to the sum of all total dollar amounts on paid invoices. Net Revenue is the calculation of sales tax and "Outside Costs" subtracted from Gross Revenue. The two columns on this report labeled as % of Gross Revenue and % of Net Revenue is the percentage of total company sales for which each individual salesperson has generated.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Salespersons' Performance Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now calculate the performance of each salesperson. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Unpaid Invoices

Description:

This report is a complete listing of all invoices that have not been marked in the system as having been paid.

Purpose:

This report provides an easy means to determine what invoices are outstanding and which invoices you consider past due. The report will list the invoice number, invoice date, Project Number, Contact person, subtotal, tax, Outside Costs and the Invoice total. This invoice will assist you in making organized collection calls for past due invoices.

Determining Data Fields:

In the Invoice Management Screen there is Checkbox field to denote an invoice as being paid. As clients remit payment, simply search out the particular invoice and click on this box. A check mark will appear in the box showing this invoice as being paid, as well as the date on which it has been paid. Once an invoice is marked as being paid it is automatically removed from the Unpaid Invoices Report.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Unpaid Invoices Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. If you have selected the “Preview Reports Before Printing?” at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Unfinished Projects

Description:

This report is a complete listing of each Round of all projects that requires additional work. Projects are listed from oldest to newest according to the date the project was opened.

Purpose:

This report will aid in prioritizing projects, determining the day's or week's workload and ultimately assist in assigning projects to specific staff members. It will enable the production manager to quickly see the status of the various Rounds of ongoing projects.

Determining Data Fields:

In the Project Management Screen there is Checkbox field labeled as Done to denote whether or not this particular Round of the project has been completed. Once the necessary tasks of each Round are completed, simply click in the box under the Done column. A checkmark will appear to denote that this Round is completed. This Round will automatically be removed from this report. Also at the top of the Project Management Screen, there is Checkbox field labeled as Project Complete. Once the entire project is completed, click on this box. This will automatically check off all the Done boxes of all the Rounds in this project. The entire project will then be removed from this report. As additional means of accuracy, once an invoice is created for project, Axis 98 will automatically label the project as being completed and remove it from the Unfinished Projects Report.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Unfinished Projects Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now list all unfinished work. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Receivables and Taxes Collected

Description:

This report is a complete listing of all invoices paid within a given date range totaling the monies and taxes collected within this period.

Purpose:

This report will aid in preparing the necessary financial data for payment of sales and corporate taxes.

Determining Data Fields:

This report draws all its data from the invoices checked off as being paid in the Invoice Management Screen. Other determining factors for taxes are as follows: First, the sales tax rate which you will have already entered in the Configure Screen and secondly, whether or not tax is to be charged. This is a function of the Tax Exempt option in the Client Management Screen.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Receivables and Taxes Collected. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now list all the paid invoices in this date range with corresponding totals. If you have selected the “Preview Reports Before Printing?” at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Outside Costs Ranking

Description:

This report is a complete listing of the items that are considered Outside Costs. Defined previously as services or products above and beyond the normal fees necessary to execute a project. For example, couriers, printers, Fed Ex, outside vendors are such items that would incur fees that would affect the profitability of a project.

Purpose:

The purpose of this report is to track expenses incurred by the various items deemed as Outside Costs. This report will help you analyze whether or not it would be cost-effective and/or profitable to bring any of these services in-house. For example, it may show that it would be more profitable to hire a delivery person, buy a certain output device or search for a cheaper outside vendor.

Determining Data Fields

This report draws all of its data from the Outside Costs window in both the Project Management and the Invoice Management screens. You can configure the exact items deemed as Outside Costs in the Configure screen.

How to Use:

In the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Annual Sales Trends by Industry Report. Once it is showing in the pulldown window, click on the Run Report Button. This will open up a window in which you must enter the desired year. Axis 98 will automatically list all industries with their respective monthly gross sales totals and finally a graph displaying annual trends. Be Patient! This report will require a little extra time to generate. The status is displayed in the bottom bar. If you have selected the “Preview Reports Before Printing?” at the bottom of the Configure Screen, the report will be displayed on your screen as a preview. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Company Sales

Description:

This report is a complete listing of all invoices generated within a given date range totaling the subtotals, taxes, gross totals and net totals within this period.

Purpose:

This report will calculate the total sales for any date range to show sales volume and the financial performance of the company.

Determining Data Fields:

This report draws all its data from the invoices and Outside Costs entered in the Invoice Management Screen. Axis 98 automatically does all the calculations.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Company Sales Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now list all invoices in this date range with corresponding totals. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Areas of Service Ranking

Description:

This financial report shows revenue totals generated by each Area of Service within a given date range.

Purpose:

This is an invaluable report in that it shows you the financial strengths and weaknesses of each of your designated areas of service in any given time period. The report lists the total number of projects, as well as the Gross and Net Revenue for each project category. It will also display a percentage for each category to show the revenue share of the company's total sales.This will help you justify decisions regarding additional equipment, staffing and advertising to bolster and expand these specific areas of service.

Determining Data Fields:

Each time a new project is entered into the the Project Management Screen it is assigned an Area of Service from the pulldown menu you previously configured. By labeling each project as a particular type, the corresponding invoice for this project is automatically labeled as such. This enables Axis 98 to then generate the financial information for each project category. As defined previously, the Net Revenue is a calculated by subtracting Sales Tax and Outside Costs from the Gross Total.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Areas of Service Ranking Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now list all the invoices in this date range with corresponding gross an net totals. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Client Ranking

Description:

This financial report shows revenue totals generated by each client within a given date range.

Purpose:

This report ranks clients from highest to lowest based on the Gross Revenue generated from each. It also lists the number of projects completed, Net Revenue and the percentage of total company sales for both Gross and Net Revenues.

Determining Data Fields:

From every invoice created for a each client, Axis 98 calculates both gross and net revenue totals. Then, based on all invoices created within a specific date range, Axis 98 calculates the percentages of both Gross and Net Revenue and ranks clients by the percentage of gross revenue.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Client Ranking Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now list all the clients in this date range with their respective gross and net revenue totals and rank them according to the highest to lowest Gross Revenue Percentage. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Industry Ranking

Description:

This financial report shows revenue totals generated by each industry within a given date range. This report ranks industries from highest to lowest based on the Gross Revenue generated from each. It also lists the number of projects completed, Net Revenue and percentage of both Gross and Net Revenues.

Purpose:

By determining the revenue generated by each industry, the company can determine which industries are most lucrative and concentrate on generating new sales from other potential clients in these same type industries.

Determining Data Fields:

Each time a new client is entered into the Client Management Screen, it is labeled as a particular industry type from the Industry Type pulldown menu. Hence, each client, project and ultimately each invoice is assigned this industry labeling. From the invoice totals within any given date range, Axis 98 can then calculate this report. Specific industry types can be added, deleted or altered in the Configure Screen. If alterations are made to a specific industry type, clients previously assigned this label will have to be manually adjusted.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Industry Ranking Report. Once it is showing in the pulldown window click on the Run Report Button. This will open up a window which you can select any specific date range or the option to use one of the preset time periods at the bottom. Axis 98 will now list all the industries in this date range with the total number of projects for each, their respective gross and net revenue totals, and rank them according to the highest to lowest Gross Revenue Percentage. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on the screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Client Contact List

Description:

This report is a complete listing of contact information for all clients, listing the specifics for each contact person. It provides phone and fax numbers, e-mail addresses, mailing and billing addresses and the three-letter code of each client.

Purpose:

This report provides an organized listing and printout of contact information for all clients. It provides a great tool for organizing client mailings, specialized telemarketing and promotions.

Determining Data Fields:

The Client Contact List Report derives all its data from the Client Management Screen. As you enter new client data, including each contact person's name and relevant information, it will automatically be added to this report.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu select the Client Contact List Report. Once it is showing in the pulldown window click on the Run Report Button. This will automatically generate the report. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on your screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Number of Clients by Industry

Description:

This report is a listing of all industries, depicting the number of clients per industry type, ranked by the most to least.

Purpose:

By determining the number of clients by each industry, the company can determine which industries most require the Company's services, and concentrate on generating new sales from other potential clients in these same type industries.

Determining Data Fields:

Each time a new client is entered into the Client Management Screen, it is labeled as a particular industry type from the Industry Type pulldown menu. Specific industry types can be added, deleted or altered in the Configure Screen. If alterations are made to a specific industry type, clients previously assigned this label will have to be manually adjusted to keep this report accurate.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Number of Clients by Industry. Once it is showing in the pulldown window, click on the Run Report button. Axis 98 will automatically list only industries which have clients displaying the total for each. If you have selected the “Preview Reports Before Printing?” at the bottom of the Configure Screen, the report will be displayed on your screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the reports after previewing them on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Annual Sales Trends by Clients

Description:

This report is a complete listing of all clients alphabetically, displaying the gross revenue for each, both month-by-month, and annual totals. At the end of the report, Axis 98 will calculate and display the total gross revenue for each month and the year. Axis 98 will also generate a line graph, plotting the totals of gross monthly revenues. This report is generated by year. If the year is not concluded, Axis 98 will do calculations based on year-to-date totals.

Purpose:

The object of this report is to illustrate monthly sales trends for each client both numerically and graphically. This will assist a company to analyze and determine busy and slow cycles for each client. The report will aid in staffing, ordering supplies, managing cash flow, scheduling internal projects and taking vacations.

Determining Data Fields:

This report draws all its data from the invoices, by client, entered in the Invoice Management Screen. Axis 98 automatically does all the calculations.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Annual Sales Trends by Clients Report. Once it is showing in the pulldown window, click on the Run Report Button. This will open up a window in which you must enter the desired year. Axis 98 will automatically list all clients with their respective monthly gross sales totals and finally a graph displaying annual trends. Be Patient! This report will require a little extra time to generate. The status is displayed in the bottom bar. If you have selected the “Preview Reports Before Printing?” at the bottom of the Configure Screen, the report will be displayed on your screen as a preview. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Annual Sales Trends by Industry

Description:

This report is a complete listing of all industries alphabetically, displaying the gross revenue for each, both month-by-month, and annual totals. At the end of the report, Axis 98 will calculate and display the total gross revenue for each month and the year. Axis 98 will also generate a line graph, plotting the totals of gross monthly revenues. This report is generated by year. If the year is not concluded, Axis 98 will do calculations based on year-to-date totals.

Purpose:

The object of this report is to illustrate monthly sales trends for each industry both numerically and graphically. This will assist a company to analyze and determine busy and slow cycles for each industry. The report will aid in staffing, ordering supplies, managing cash flow, scheduling internal projects and taking vacations.

Determining Data Fields:

This report draws all its data from the invoices, categorized by industry, entered in the Invoice Management Screen. Axis 98 automatically does all the calculations.

How to Use:

n the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Annual Sales Trends by Industry Report. Once it is showing in the pulldown window, click on the Run Report Button. This will open up a window in which you must enter the desired year. Axis 98 will automatically list all industries with their respective monthly gross sales totals and finally a graph displaying annual trends. Be Patient! This report will require a little extra time to generate. The status is displayed in the bottom bar. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on your screen as a preview. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

R E P O R T I N G

Report Title: Clients per Business Source

Description:

This report is a listing of all sources from which business is generated, such as print advertising, salesforce and your web site, depicting the number of clients gained by each type, ranked by the most to least.

Purpose:

By determining the number of clients gained by each source, a company can determine the most effective means to market its services. By including the amount of money allocated to each source entered into Axis 98, the marketing director can determine the profitability of each marketing vehicle. It will also aid in determining future allocations of the advertising and staffing budget.

Determining Data Fields:

In the Configure Screen you can create a customized list of all sources that could possibly generate new clients for the company. Each time a new client is entered into the Client Management Screen, it is required to enter how the client was gained from the Business Source pulldown menu.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Clients per Business Source Report. Once it is showing in the pull-down window, click on the Run Report Button. Axis 98 will automatically list all the possible Business Sources displaying the total number of clients generated by each. If you have selected the “Preview Reports Before Printing?” at the bottom of the Configure Screen, the report will be displayed on your screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigation Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Report Title: Business Source Ranking

Description:

This financial report is a listing of all sources from which business is generated, such as print advertising, salesforce and your web site, depicting the number of projects, gross and net revenue totals and percentages for each.

Purpose:

By determining the revenue gained by each source, a company can determine which the most effective means to market the its services. By including the amount of money spent on each Business Source, the marketing director can determine the profitability of each marketing vehicle. It will then aid in determining future allocations of advertising and staffing budgets.

Determining Data Fields:

In the Configure Screen you can create customized list of all sources that have been implemented to generate new clients for the company. Each time a new client is entered into the Client Management Screen, it is required to enter how the client was gained from the Business Source pulldown menu. This label is carried through to all invoicing, thus determining revenue generated.

How to Use:

On the Control Pad there is a pulldown menu in the Reporting section. From this menu, select the Business Source Ranking Report. Once it is showing in the pulldown window, click on the Run Report Button. Axis 98 will automatically list all the possible Business Sources displaying the total amount of revenue generated by each. If you have selected the "Preview Reports Before Printing?" at the bottom of the Configure Screen, the report will be displayed on your screen as a preview first. Otherwise, the report will automatically print to your default printer. If there are multiple pages generated for this report, the total number of pages will be displayed as a number on the right side of the Navigational Bar at the bottom of the screen. The page number of what is currently being viewed is displayed in the field between the Navigation Buttons. To view other pages use the forward and back buttons in the Navigation Bar. If you want to print the report after previewing it on screen, click on the Printer Icon Button at the top of the screen to use your default printer settings. If, however you have loaded special paper or letterhead in a special printer tray, type Ctrl P. This window will give you the necessary options to print from the desired tray. As alternate means of selecting special printers or trays click on the Page Setup Button at the top of the screen. Click the Page Tab to select a printer or tray. Now use the Printer Icon Button to print the report. When finished printing, click on the X Box in the upper right corner of the report preview. This will close the window and return to the Control Pad.

(See sample report in Chapter 13)

Chapter 13: Sample Reports

The following pages are samples of each type report detailed in the preceding chapter.

Areas of Service Ranking

Report Range: January 1, 1998 through March 31, 1998

Area of Service	# Projects	Gross* Revenue	% of Gross* Revenue	Net* Revenue	% of Net* Revenue
Presentations	68	**$61,727**	33.36 %	$55,066	33.72 %
Output	104	**$49,783**	26.91 %	$45,649	27.96 %
New Media	11	**$28,751**	15.54 %	$26,848	16.44 %
Internet	14	**$20,244**	10.94 %	$19,730	12.08 %
Print	7	**$19,831**	10.72 %	$14,675	8.99 %
Art	8	**$4,671**	2.52 %	$1,326	0.81 %
Programming					
	212	**$185,007**		**$163,294**	

Report run on Wednesday, July 29, 1998 at 12:58 pm

* Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Client Contact List

Company 1		**Billing Address** P.O. Box 2900 J 12 Valley Forge, PA 19482		**Client Code** VGI
Contact Name	**Telephone**	**Fax**	**Email**	
Person's Name 100 Chester Field Parkway J12 Malvern, PA 19355	555.555.5555	444.444.4444		
Company 10		**Billing Address** 40 Monument Rd. 2nd Floor Bala Cynwyd, PA 19004		**Client Code** KAR
Contact Name	**Telephone**	**Fax**	**Email**	
Person's Name 40 Monument Rd. 2nd Floor Bala Cynwyd, PA 19004	555.555.5555	444.444.4444		
Company 100		**Billing Address** 34 Garrett Rd. Upper Darby, PA 19082		**Client Code** PCI
Contact Name	**Telephone**	**Fax**	**Email**	
Person's Name 34 Garrett Rd. Upper Darby, PA 19082	555.555.5555	444.444.4444		
Company 101		**Billing Address** 3755 Aramingo Ave. Phila., PA 19137		**Client Code** PGT
Contact Name	**Telephone**	**Fax**	**Email**	
Person's Name 3755 Aramingo Ave. Phila., PA 19137	555.555.5555	444.444.4444		
Company 102		**Billing Address** 215 City Ave. Merion Station, PA 19066		**Client Code** BPM
Contact Name	**Telephone**	**Fax**	**Email**	
Person's Name 215 City Ave. Merion Station, PA 19066	555.555.5555	444.444.4444		
Company 103		**Billing Address** 777 Henderson Blvd. Park Square North Bldg. #6 Folcroft, PA 19032		**Client Code** RIE
Contact Name	**Telephone**	**Fax**	**Email**	
Person's Name 777 Henderson Blvd. Park Square North Bldg. #6 Folcroft, PA 19032	555.555.5555	444.444.4444		

Client Ranking Report

Report Range: May 1, 1998
through May 31, 1998

Client	# Projects	Gross* Revenue	% of Gross* Revenue	Net* Revenue	% of Net* Revenue
Company 1	38	**$24,416**	36.07 %	*$20,172*	*34.53 %*
Company 9	3	**$16,538**	24.43 %	*$14,190*	*24.29 %*
Company 2	11	**$10,930**	16.15 %	*$10,166*	*17.40 %*
Company 5	25	**$9,558**	14.12 %	*$8,425*	*14.42 %*
Company 43	10	**$2,216**	3.27 %	*$1,957*	*3.35 %*
Company 4	4	**$1,238**	1.83 %	*$1,048*	*1.79 %*
Company 3	5	**$1,021**	1.51 %	*$963*	*1.65 %*
Company 20	3	**$478**	0.71 %	*$425*	*0.73 %*
Company 36	3	**$286**	0.42 %	*$188*	*0.32 %*
Company 12	1	**$265**	0.39 %	*$185*	*0.32 %*
Company 32	1	**$176**	0.26 %	*$166*	*0.28 %*
Company 34	1	**$170**	0.25 %	*$160*	*0.27 %*
Company 8	1	**$150**	0.22 %	*$150*	*0.26 %*
Company 40	2	**$121**	0.18 %	*$114*	*0.20 %*
Company 7	1	**$95**	0.14 %	*$90*	*0.15 %*
Company 30	1	**$38**	0.06 %	*$25*	*0.04 %*
	110	**$67,697**		***$58,425***	

* Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Number of Clients by Business Source

Source	Date Range	$ Spent	# Clients
Referral			43
Sales Force			38
E. Mont. Yellow Pages	*2/97 - 1/98*	*$831.00*	4
E. Main Line Yellow Pages	*11/97 - 10/98*	*$1,002.00*	4
W. Main Line Yellow Pages	*11/97 - 10/98*	*$948.00*	3
Norristown Yellow Pages	*8/97 - 7/98*	*$936.00*	3
Website			2
Staff Referral			2
Walk-in			1
Phila. Yellow Pages '98	*3/98 - 2/99*	*$1,542.00*	1
Phila. Yellow Pages '97	*3/97 - 2/98*	*$669.00*	1
Direct Mail			1
			103

Number of Clients by Industry

Industry	# Clients
Healthcare/Medical	11
Design/Graphics	11
Consulting	10
Advertising/Marketing/P.R.	8
Pharmaceutical	8
Banking/Financial	6
Manufacturing	6
Investment Firms	5
Computer - Software	4
Insurance	4
Printing/Publishing	4
Real Estate	3
Retail	3
Telecommunications	3
Chemical	3
Biotechnology	3
Legal	2
Computer - Hardware	2
Food Services	2
Utilities	1
Non-Profit	1
Defense/Aerospace	1
Construction	1
Transportation	1
	103

Company Sales Report

Report Range: January 1, 1998
through January 14, 1998

Job No.	Invoice Date	Inv. No.	Client	Subtotal	Tax	Goss Total	Net Total	Paid Date
VGI00252	1/5/98	778	Company 1	$210.00	$12.60	**$222.60**	$210.00	*2/9/98*
COM0008	1/5/98	764	Company 40	$90.00	$5.40	**$95.40**	$90.00	*1/23/98*
HAY0009	1/5/98	765	Company 36	$41.00	$2.46	**$43.46**	$16.00	*1/23/98*
VGI00253	1/5/98	767	Company 1	$6,431.50	$385.89	**$6,817.39**	$5,814.50	*1/16/98*
HQM00005	1/5/98	768	Company 17	$125.00	$7.50	**$132.50**	$125.00	*1/23/98*
VGI0250	1/5/98	769	Company 1	$19.00	$1.14	**$20.14**	$19.00	*1/30/98*
VGI0247	1/5/98	770	Company 1	$827.00	$49.62	**$876.62**	$827.00	*1/30/98*
GBC0002	1/5/98	771	Company 12	$1,000.00	$60.00	**$1,060.00**	$668.73	*2/20/98*
GBC0004	1/5/98	772	Company 12	$58.00	$3.48	**$61.48**	$45.00	*2/20/98*
KAR00033	1/5/98	773	Company 3	$205.00	$12.30	**$217.30**	$205.00	*1/23/98*
KAR00034	1/5/98	774	Company 3	$328.00	$19.68	**$347.68**	$328.00	*1/23/98*
HUE0001	1/5/98	775	Company 11	$250.00	$0.00	**$250.00**	$250.00	*2/20/98*
WYE0164	1/5/98	763	Company 2	$645.00	$38.70	**$683.70**	$645.00	*2/20/98*
VGI0249	1/5/98	777	Company 1	$590.00	$35.40	**$625.40**	$535.00	*2/9/98*
MKW0000	1/5/98	776	Company 30	$300.00	$18.00	**$318.00**	$300.00	*1/23/98*
DEL0035	1/9/98	779	Company 7	$1,150.00	$69.00	**$1,219.00**	$1,150.00	*3/2/98*
DEL00036	1/9/98	780	Company 7	$180.00	$10.80	**$190.80**	$180.00	*3/2/98*
VGI0251	1/9/98	781	Company 1	$2,000.00	$120.00	**$2,120.00**	$2,000.00	*1/23/98*
BAY00001	1/12/98	782	Company 23	$805.00	$48.30	**$853.30**	$775.00	*1/30/98*
THW0004	1/13/98	790	Company 13	$718.00	$43.08	**$761.08**	$693.00	*2/20/98*
VGI00254	1/13/98	783	Company 1	$1,100.00	$66.00	**$1,166.00**	$1,100.00	*1/23/98*
VGI00256	1/13/98	784	Company 1	$205.00	$12.30	**$217.30**	$205.00	*1/23/98*
KAR00035	1/13/98	785	Company 3	$75.00	$4.50	**$79.50**	$75.00	*1/30/98*
VGI00255	1/13/98	786	Company 1	$70.00	$4.20	**$74.20**	$70.00	*1/23/98*
VGI00257	1/13/98	787	Company 1	$260.00	$15.60	**$275.60**	$260.00	*1/30/98*
MAG00035	1/13/98	788	Company 4	$442.00	$26.52	**$468.52**	$417.00	*3/13/98*
DEL00039	1/13/98	789	Company 7	$200.00	$12.00	**$212.00**	$200.00	
				$18,324.50	**$1,084.47**	**$19,408.97**	**$17,203.23**	

Report run on Wednesday, July 29, 1998 at 12:56 pm

*Subtotal (invoice amount before tax), Tax (invoice tax amount),
Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Freelance Contact List

Freelance Personnel

Name	Work Tel #/Ext	Home Tel #	Address	Notes
Furman, Mike	222.222.2222	111.111.1111	128 Jackson St. Phone, RI 44444	Killer @ .ppt No computer @ home
Kane, Sandy	123.123.3456	123.456.7890	208 Laurelwood Dr. Douglasville, PA 19518	no computer @ home; Strong in PowerPoint
Lamb, Sandy	123.098.0980	111.111.1111	808 Markham Place Springfield, MS 00000	PC @ home
Lasio, Joe	123.345.5678	123.345.6789	11 Park Ridge Rd. Mt. Folly, WS 12345	Mac @ home
Lassie, Lisa	888.888.8888	555.555.5555	2635 S. Mole St. Pitts, OH 66666	Mac @ home
Lisa Wagner	444.444.4444	555.555.5555	1313 Mockingbird Lane Anytown, XX 12345	Strong Mac & Windows skills; complete home office; strengths are Director, Illustrator & Photoshop
Pette, Laurie	222.222.2222	333.333.3333	900 Emerson St. Jonesland, KS 77777	Mac @ home
Rome, Terry	777.777.7777	888.888.8888	123 Main St. Narrowsburg, TX 44444	Illustrator
Slym, Jim	999.999.9999	222.222.2222	880 N. Beechwood St. Pittsburgh, MD 09090	No computer @ home
Stone, Jeff	222.222.2222	555.555.5555	625 B St. Newton, FL 33333	Mac @ home
Wells, Sam	000.000.0000	999.999.9999	45 Rod Ave. Gatestown, PA 44455	mac @ home
Williams, Stacey	111.111.1111	222.222.2222		mac @ home

St. Clair, David
77 Wayne Ave.
Athens, MN 33333

Hourly Employee Wages Report

**Report Range: January 1, 1998
through January 14, 1998**

Project	Date	Hours	Rate/Hr	Total
XYZ00001	Wednesday, January 14, 1998	6.00	$25.00	$150.00
XYZ00001	Tuesday, January 13, 1998	8.00	$25.00	$200.00
XYZ00001	Friday, January 09, 1998	8.00	$25.00	$200.00
XYZ00001	Monday, January 05, 1998	8.00	$25.00	$200.00
		30.00		**$750.00**

Industry Ranking Report

Report Range: January 1, 1998 through March 31, 1998

Industry	# Projects	Gross* Revenue	% of Gross* Revenue	Net* Revenue	% of Net* Revenue
Investment Firms	79	**$62,942**	34.02 %	*$58,269*	*35.68 %*
Pharmaceutical	50	**$57,176**	30.90 %	*$50,936*	*31.19 %*
Design/Graphics	12	**$25,451**	13.76 %	*$25,351*	*15.52 %*
Telecommunications	5	**$10,092**	5.45 %	*$4,945*	*3.03 %*
Consulting	23	**$6,937**	3.75 %	*$6,452*	*3.95 %*
Computer - Hardware	1	**$3,978**	2.15 %	*$3,700*	*2.27 %*
Defense/Aerospace	2	**$3,887**	2.10 %	*$739*	*0.45 %*
Advertising/Marketing/P.R.	8	**$2,734**	1.48 %	*$2,353*	*1.44 %*
Printing/Publishing	6	**$2,707**	1.46 %	*$2,566*	*1.57 %*
Utilities	1	**$2,539**	1.37 %	*$2,365*	*1.45 %*
Biotechnology	10	**$2,449**	1.32 %	*$2,242*	*1.37 %*
Healthcare/Medical	6	**$1,689**	0.91 %	*$1,571*	*0.96 %*
Insurance	3	**$1,023**	0.55 %	*$900*	*0.55 %*
Food Services	3	**$583**	0.32 %	*$172*	*0.11 %*
Manufacturing	1	**$350**	0.19 %	*$290*	*0.18 %*
Retail	1	**$318**	0.17 %	*$300*	*0.18 %*
Computer - Software	1	**$153**	0.08 %	*$144*	*0.09 %*
Transportation					
Architecture/Engineering					
Banking/Financial					
Legal					
Real Estate					
Construction					
Government					
Hospitality/Meeting					
Chemical					
Video Production					
Religious					
Gaming					
Technology					
Agriculture					
Environmental					
Education					
Accounting					
Non-Profit					
	212	**$185,007**		***$163,294***	

* Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Outside Costs Ranking Report

Report Range: January 1, 1998
through January 31, 1998

Outside Costs Category	Costs
35mm Slide Duplication	*$200*
Artist	*$150*
Courier Delivery	*$799*
FedEx Delivery	*$117*
Printing	*$4,105*
	$5,371

* Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Personnel Contact List

Commissioned Sales Personnel

Name	Work Tel #/Ext	Home Tel #	Address	Notes
Heeney, Betsy	111.111.1111	222.222.2222	45 Jay Ave. Tollsville, VA 67890	Strong Customer Service Skills
Sonn, David J.	888.888.8888	999.999.9999	231 Wayne Ave. Now, CO 67676	Strong knowledge of market

Salaried Personnel

Name	Work Tel #/Ext	Home Tel #	Address	Notes
Darrow, David	555.555.5555	444.444.4444	123 Vine St. Wayne, NJ 09876	Mac Guru!
Jurkiewicz, Clifford	345.345.3456	123.123.1234	78 Yo Yo Blvd. Rileyville, KY 56789	Strong Photo Background
Mullin, Michael	444.444.4444	222.222.2222	133 Lexington Drive Thames, GA 99999	Programmer & Designer

Hourly Personnel

Name	Work Tel #/Ext	Home Tel #	Address	Notes
St. Clair, David	555.555.5555	121.222.2222	77 Wayne Ave. Athens, MN 33333	Art Director

Employee Profit-Sharing Report

For the period of Sunday, February 1, 1998
through Saturday, February 14, 1998

Darrow, David

Client	Invoice	Date Paid	Subtotal	Outside $	Net Total	Sharing
Company 36	**000638**	2/9/98	$221.00	$13.00	$208.00	$4.16
Company 4	**000655**	2/9/98	$1,015.00	$55.00	$960.00	$19.20
Company 4	**000749**	2/9/98	$186.00	$0.00	$186.00	$3.72
Company 36	**000757**	2/9/98	$577.00	$101.00	$476.00	$9.52
Company 11	**000760**	2/9/98	$390.00	$0.00	$390.00	$7.80
Company 11	**000761**	2/9/98	$300.00	$0.00	$300.00	$6.00
Company 1	**000777**	2/9/98	$590.00	$55.00	$535.00	$10.70
Company 1	**000778**	2/9/98	$210.00	$0.00	$210.00	$4.20
Company 1	**000801**	2/9/98	$39.00	$0.00	$39.00	$0.78
Company 1	**000802**	2/9/98	$251.00	$30.00	$221.00	$4.42
Company 1	**000803**	2/9/98	$440.00	$0.00	$440.00	$8.80
Company 1	**000804**	2/9/98	$1,059.00	$0.00	$1,059.00	$21.18
Company 3	**000823**	2/9/98	$240.00	$0.00	$240.00	$4.80

Total Sharing **$105.28**

Receivables and Tax Report

Report Range: July 1, 1998
through July 14, 1998

Job No.	Invoice Date	Inv. No.	Client	Subtotal	Tax	Goss Total	Paid Date
RSC00001	5/21/98	1120	Company 43	$91.00	$5.46	**$96.46**	*7/2/98*
WYE00214	5/10/98	1079	Company 2	$67.00	$4.02	**$71.02**	*7/2/98*
WYE00217	5/10/98	1080	Company 2	$366.00	$21.96	**$387.96**	*7/2/98*
WYE00220	5/20/98	1108	Company 2	$720.00	$43.20	**$763.20**	*7/2/98*
WYE00221	5/20/98	1109	Company 2	$630.00	$37.80	**$667.80**	*7/2/98*
WYE00222	5/20/98	1110	Company 2	$450.00	$27.00	**$477.00**	*7/2/98*
WYE00223	5/20/98	1111	Company 2	$798.00	$47.88	**$845.88**	*7/2/98*
WYE00224	5/20/98	1112	Company 2	$899.00	$53.94	**$952.94**	*7/2/98*
WYE00225	5/20/98	1113	Company 2	$818.00	$49.08	**$867.08**	*7/2/98*
WYE00226	5/20/98	1114	Company 2	$469.00	$28.14	**$497.14**	*7/2/98*
WYE00227	5/21/98	1116	Company 2	$822.00	$49.32	**$871.32**	*7/2/98*
PBA00001	5/26/98	1124	Company 43	$170.00	$10.20	**$180.20**	*7/2/98*
WYE00228	5/29/98	1154	Company 2	$4,272.75	$256.36	**$4,529.11**	*7/2/98*
HAM00001	6/19/98	1201	Company 43	$93.00	$5.58	**$98.58**	*7/2/98*
BCG00001	6/19/98	1207	Company 21	$100.00	$6.00	**$106.00**	*7/2/98*
BCG00003	6/19/98	1206	Company 21	$850.00	$51.00	**$901.00**	*7/2/98*
BCG00004	6/19/98	1205	Company 21	$100.00	$6.00	**$106.00**	*7/2/98*
MES00061	6/4/98	1158	Company 9	$532.00	$31.92	**$563.92**	*7/2/98*
VGI00371	6/4/98	1170	Company 1	$56.00	$3.36	**$59.36**	*7/2/98*
VGI00368	6/4/98	1166	Company 1	$313.00	$18.78	**$331.78**	*7/2/98*
MES00062	6/4/98	1159	Company 9	$204.00	$12.24	**$216.24**	*7/2/98*
VGI00367	6/4/98	1165	Company 1	$594.00	$35.64	**$629.64**	*7/2/98*
NOV00008	4/22/98	1001	Company 43	$120.00	$7.20	**$127.20**	*7/10/98*
CMC00005	4/22/98	1003	Company 5	$143.00	$8.58	**$151.58**	*7/10/98*
CMC00008	4/27/98	1021	Company 5	$2,663.00	$159.78	**$2,822.78**	*7/10/98*
CMC00003	4/27/98	1022	Company 5	$365.00	$21.90	**$386.90**	*7/10/98*
CMC00007	4/27/98	1023	Company 5	$180.00	$10.80	**$190.80**	*7/10/98*
HAY00011	4/30/98	1033	Company 36	$420.00	$25.20	**$445.20**	*7/10/98*
CMC00002	4/30/98	1040	Company 5	$3,388.00	$203.28	**$3,591.28**	*7/10/98*
VGI00379	6/10/98	1186	Company 1	$180.00	$10.80	**$190.80**	*7/10/98*
HAY00014	5/29/98	1152	Company 36	$187.00	$11.22	**$198.22**	*7/10/98*
MKW00006	7/10/98	1261	Company 30	$481.00	$0.00	**$481.00**	*7/10/98*
PMR00001	5/21/98	1117	Company 43	$180.00	$10.80	**$190.80**	*7/10/98*
HAY00012	5/21/98	1122	Company 36	$47.25	$2.83	**$50.08**	*7/10/98*
HAY00013	5/21/98	1121	Company 36	$36.00	$2.16	**$38.16**	*7/10/98*
VGI00373	6/10/98	1185	Company 1	$637.00	$38.22	**$675.22**	*7/10/98*
VGI00377	6/10/98	1184	Company 1	$25.00	$1.50	**$26.50**	*7/10/98*
KAR00060	6/30/98	1252	Company 3	$48.00	$2.88	**$50.88**	*7/10/98*
UPM00013	5/10/98	1052	Company 43	$125.00	$7.50	**$132.50**	*7/10/98*
				$22,640.00	**$1,329.54**	**$23,969.54**	

*Subtotal (invoice amount before tax), Tax (invoice tax amount),
Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Salespersons' Commission Report

Sonn, David J.

Report Range: February 1, 1998
through February 14, 1998

Client	Invoice	Date Paid	Subtotal	Outside $	Net Total	Com $
Company 3	**000823**	2/9/98	$240.00	$0.00	$240.00	$24.00
Company 1	**000804**	2/9/98	$1,059.00	$0.00	$1,059.00	$105.90
Company 1	**000803**	2/9/98	$440.00	$0.00	$440.00	$44.00
Company 1	**000802**	2/9/98	$251.00	$30.00	$221.00	$22.10
Company 1	**000801**	2/9/98	$39.00	$0.00	$39.00	$3.90
Company 1	**000778**	2/9/98	$210.00	$0.00	$210.00	$21.00
Company 1	**000777**	2/9/98	$590.00	$55.00	$535.00	$53.50
Company 11	**000761**	2/9/98	$300.00	$0.00	$300.00	$30.00
Company 11	**000760**	2/9/98	$390.00	$0.00	$390.00	$39.00
Company 36	**000757**	2/9/98	$577.00	$101.00	$476.00	$47.60
Company 4	**000749**	2/9/98	$186.00	$0.00	$186.00	$18.60
Company 4	**000655**	2/9/98	$1,015.00	$55.00	$960.00	$96.00
Company 36	**000638**	2/9/98	$221.00	$13.00	$208.00	$20.80

Total Commission **$526.40**

Salesperson Performance Report

Report Range: January 1, 1997 through March 31, 1997

Sales Rep	# Projects	Gross* Revenue	% of Gross* Revenue	Net* Revenue	% of Net* Revenue
Sonn, David J.	136	**$83,072**	86.74 %	*$76,673*	*88.41 %*
St. Clair, David	3	**$12,694**	13.26 %	*$10,054*	*11.59 %*
	139	**$95,766**		***$86,727***	

* Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Sources Ranking Report

Report Range: January 1, 1998 through June 30, 1998

Source	Date Range	$ Spent	# Projects	Gross*	% of Gross*	Net*	% of Net*
Sales Force			187	**$138,304**	35.59 %	*$125,054*	*39.48 %*
Referral			119	**$132,355**	34.06 %	*$88,857*	*28.05 %*
Staff Referral			147	**$101,841**	26.21 %	*$90,987*	*28.73 %*
E. Main Line Yellow Pages	**11/97 - 10/98**	**$1,002.00**	13	**$8,857**	2.28 %	*$8,093*	*2.56 %*
E. Mont. Yellow Pages	**2/97 - 1/98**	**$831.00**	5	**$4,828**	1.24 %	*$1,600*	*0.51 %*
Norristown Yellow Pages	**8/97 - 7/98**	**$936.00**	2	**$1,706**	0.44 %	*$1,566*	*0.49 %*
W. Main Line Yellow Pages	**11/97 - 10/98**	**$948.00**	3	**$617**	0.16 %	*$542*	*0.17 %*
Phila. Yellow Pages '97	**3/97 - 2/98**	**$669.00**	1	**$53**	0.01 %	*$50*	*0.02 %*
Website							
Walk-in							
Pitts. B to B	**12/98 - 11/99**	**$660.00**					
Phila. B to B	**6/98 - 5/99**	**$1,362.00**					
Balt. B to B	**6/98 - 5/99**	**$324.00**					
Phila. Yellow Pages '98	**3/98 - 2/99**	**$1,542.00**					
TV Commercial							
Radio Commercial							
Direct Mail							
Banner Ad							
NJ B to B	**1/99 - 12/99**	**$444.00**					
			477		**$388,561**	***$316,749***	

* Gross Total (invoice total including tax), Net Total (subtotal less "outside costs")

Gross Sales – Monthly Trends by Client

1997

Client	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Company 1	$9,267	$13,862	$5,275	$4,798	$32,707	$3,485	$10,766	$16,214	$10,358	$18,918	$19,870	$7,500	**$153,017**
Company 10													
Company 100													
Company 101													
Company 102													
Company 103													
Company 11								$4,000	$1,035			$690	**$5,725**
Company 12													
Company 13						$68			$690				**$758**
Company 14						$681		$555			$313		**$1,549**
Company 15							$600		$252				**$852**
Company 16								$1,401					**$1,401**
Company 17								$845	$277	$207			**$1,328**
Company 18								$557		$1,082	$106		**$1,744**
Company 19													
Company 2	$1,734	$5,838	$17,706	$11,281	$15,924	$1,737	$32,263	$1,773	$23,194	$14,193	$9,063	$166	**$134,874**
Company 20			$224			$86	$144	$114	$124	$2,490	$266		**$3,448**
Company 21													
Company 22						$80		$93	$318				**$491**
Company 23													
Company 24													
Company 25													
Company 26													
Company 27													
Company 28													
Company 29													
Company 3	$541	$90		$986		$602	$1,382	$1,161	$1,060	$561	$2,017	$569	**$8,969**
Company 30													
Company 31													
Company 32												$1,161	**$1,161**
Company 33													
Company 34	$6,000	$150	$6,544				$6,000	$6,544					**$25,238**
Company 35													
Company 36	$812					$1,027	$162			$234		$612	**$2,847**
Company 37							$114	$93	$41				**$249**
Company 38													
Company 39									$204			$311	**$514**
Company 4	$841	$52	$1,233	$1,186		$153	$216	$742	$1,466	$2,012		$197	**$8,097**
Company 40	$69					$1,352			$1,569	$453		$242	**$3,684**
Company 41													
Company 42													
Company 43	$11,367	$5,682	$7,388	$5,942	$5,338	$2,935	$596	$1,032	$2,552	$8,936	$4,035	$175	**$55,979**
Company 44													
Company 45													
Company 46													
Company 47													
Company 48													
Company 49													
Company 5													
Company 50													
Company 51													
Company 52													
Company 53													
Company 54													
Company 55													
Company 56													
Company 57													

Gross Sales – Monthly Trends by Client

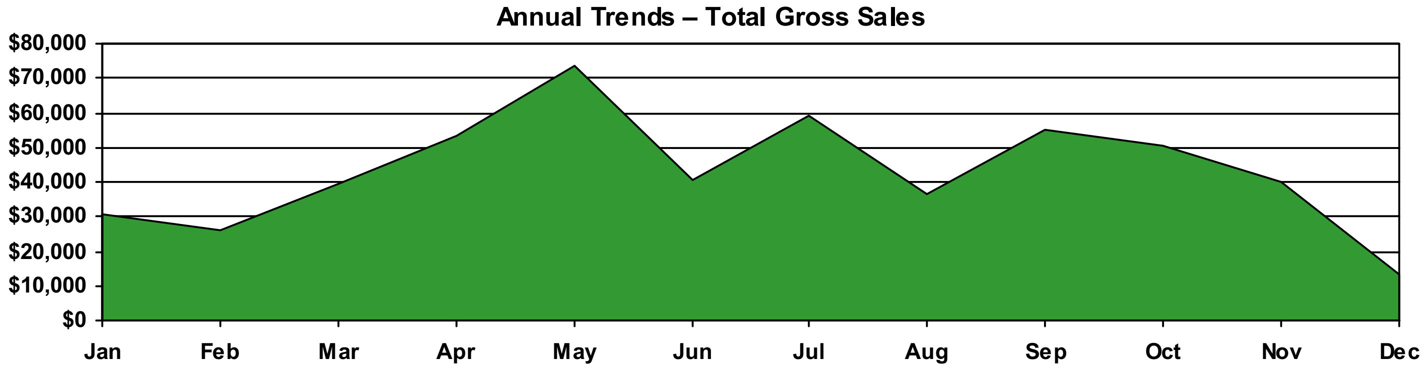
1997

Client	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Company 58													
Company 59													
Company 6				$5,806		$13,215				$1,162			**$20,182**
Company 60													
Company 61													
Company 62													
Company 63													
Company 64													
Company 65													
Company 66													
Company 67													
Company 68													
Company 69													
Company 7			$619	$3,058	$675	$4,057	$5,019	$1,270	$204			$120	**$15,023**
Company 70													
Company 71													
Company 72													
Company 73													
Company 74													
Company 75													
Company 76													
Company 77													
Company 78													
Company 79													
Company 8				$890		$955	$1,765				$161		**$3,772**
Company 80													
Company 81													
Company 82													
Company 83													
Company 84													
Company 85													
Company 86													
Company 87													
Company 88													
Company 89													
Company 9		$286	$187	$19,098	$18,892	$10,022			$11,540	$83	$4,196	$1,526	**$65,831**
Company 90													
Company 91													
Company 92													
Company 93													
Company 94													
Company 95													
Company 96													
Company 97													
Company 98													
Company 99													

Gross Sales – Monthly Trends by Client

1997

Client	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
	$30,630	$25,961	$39,175	$53,044	$73,537	$40,454	$59,029	$36,395	$54,884	$50,330	$40,027	$13,268	$516,734

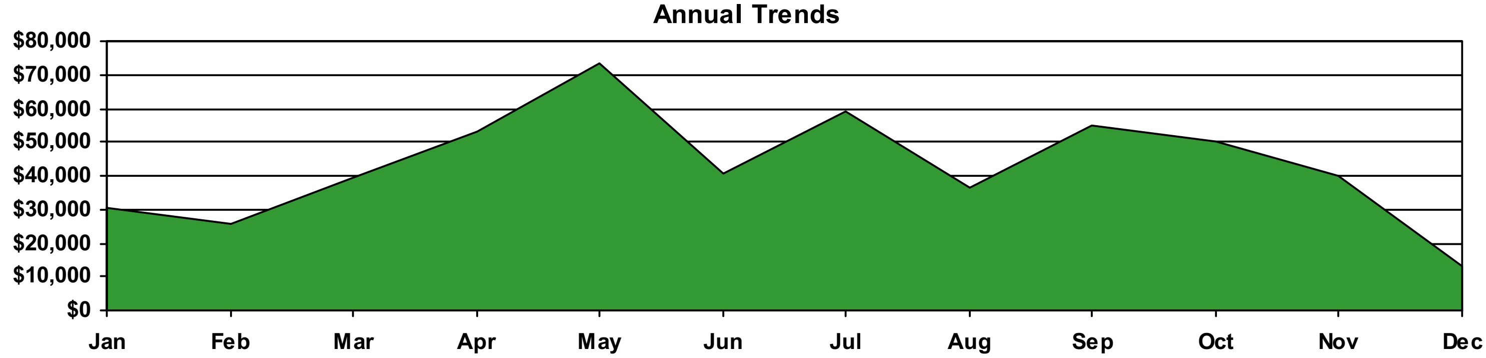


Gross Sales – Monthly Trends by Industry

1997

Industry	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Accounting													
Advertising/Marketing/P.R.	$6,000	$150	$6,544			$80	$6,000	$6,637	$927	$227			**$26,564**
Agriculture													
Architecture/Engineering													
Banking/Financial	$2,540		$350	$173	$159								**$3,222**
Biotechnology	$1,355	$52	$1,233	$1,685	$51	$153	$331	$974	$1,507	$2,012	$259	$197	**$9,808**
Chemical				$708						$477			**$1,185**
Computer - Hardware						$681		$555			$313		**$1,549**
Computer - Software									$421	$1,447		$311	**$2,178**
Construction													
Consulting	$1,353	$1,256	$187	$20,351	$19,598	$11,652	$1,544	$1,161	$12,600	$878	$7,105	$2,707	**$80,391**
Defense/Aerospace							$600		$252				**$852**
Design/Graphics	$130			$1,081	$64	$955	$2,310	$4,877	$1,069	$3,225	$484	$865	**$15,060**
Education													
Environmental													
Food Services													
Gaming													
Government													
Healthcare/Medical			$504	$501		$128	$51		$478	$108		$1,161	**$2,931**
Hospitality/Meeting													
Insurance		$1,087	$535			$2,893	$144	$114	$391	$2,490	$576		**$8,230**
Investment Firms	$9,267	$13,862	$5,894	$7,856	$33,382	$7,543	$15,786	$18,885	$10,562	$18,918	$19,870	$7,619	**$169,442**
Legal	$6,927	$2,878						$572			$2,359		**$12,736**
Manufacturing		$657								$4,535			**$5,192**
Non-Profit													
Pharmaceutical	$2,602	$6,019	$23,929	$11,281	$20,241	$1,805	$32,263	$1,773	$24,004	$14,193	$9,063	$166	**$147,340**
Printing/Publishing	$144							$845	$277	$207			**$1,472**
Real Estate				$3,496	$42				$827				**$4,365**
Religious													
Retail	$245			$106									**$351**
Technology													
Telecommunications	$69					$1,352			$1,569	$453		$242	**$3,684**
Transportation													
Utilities				$5,806		$13,215				$1,162			**$20,182**
Video Production													
	$30,630	**$25,961**	**$39,175**	**$53,044**	**$73,537**	**$40,454**	**$59,029**	**$36,395**	**$54,884**	**$50,330**	**$40,027**	**$13,268**	**$516,734**

Annual Trends



Unfinished Projects Report

Report Range: May 1, 1998
through May 31, 1998

COM00012 – Company 5 (Presentations) — *Friday, May 01, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Jurkiewicz, Clifford	Slides	Design	3	1	3	5/5/98	5:00 PM	Std	'97 template matching report

VGI00349 – Company 1 (Output) — *Monday, May 04, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Jurkiewicz, Clifford	Slides	Output	7	1	7	5/6/98	5:00 PM	Std	do not adjust levels

MES00060 – Company 5 (Output) — *Friday, May 08, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Jurkiewicz, Clifford	B/W Prints	Output	22	1	22	5/8/98	5:00 PM	Std	add to tag PDP203 Title Slides
002	☐	Jurkiewicz, Clifford	Slides	Output	22	1	22	5/11/98	5:00 PM	Std	plastic

TOC00002 – Company 5 (Internet) — *Monday, May 11, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Jurkiewicz, Clifford	Site Map	Design	1	1	1	5/13/98	5:00 PM	Std	design map & e-mail
002	☐	Jurkiewicz, Clifford	Web Site	Design	2	1	2	5/15/98	5:00 PM	Std	design home page

GBC00009 – Company 5 (Print) — *Thursday, May 14, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	St. Clair, David	Logo	AA	1	3	3	5/15/98	5:00 PM	Std	configure logo for output
002	☐	St. Clair, David	Linotronic	Send Out	1	1	1	5/15/98	5:00 PM	Std	fed ex

GBC00010 – Company 5 (Print) — *Thursday, May 14, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	St. Clair, David	Folders	Design	1	1	1	5/23/98	5:00 PM	Std	
001	☐	St. Clair, David	Color Print	Output	10	1	10	5/24/98	5:00 PM	Std	
	☐			Output	0	0	0		5:00 PM	Std	

MSM00006 – Company 5 (Print) — *Monday, May 18, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	St. Clair, David	Note Pads	Design	1	1	1	5/22/98	5:00 PM	Std	
002	☐	St. Clair, David	Note Pads	Send Out	40	50	2000	5/22/98	5:00 PM	Std	

ABC00001 – Company 5 (New Media) — *Tuesday, May 19, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes

TOC00003 – Company 5 (Art) — *Tuesday, May 19, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Darrow, David	Flier	Design	1	1	1	6/30/98	5:00 PM	Std	8.5 x 11 full color 2 sides

GBC00012 – Company 5 (Internet) — *Wednesday, May 20, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Darrow, David	Web Site	Design	1	1	1	5/22/98	5:00 PM	Std	create 1 under con w/ logo

VGI00369 – Company 1 (Output) — *Thursday, May 28, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Mullin, Michael	Slides	Output	1	1	1	5/28/98	5:00 PM	, Priority Se	0022865 90552 pvi
002	☐	Mullin, Michael	Slides	Output	4	1	4	5/28/98	5:00 PM	Std	0024666 91507 great western chem

PBA00002 – Company 5 (Presentations) — *Friday, May 29, 1998*

Rnd	Done?	Assigned to	Type	Proc.	Orig.	Qty	Total	Due Date	Time	Priority	Notes
001	☐	Jurkiewicz, Clifford	On-Screen	Design	3	1	3	6/3/98	5:00 PM	Std	design treaments '95 ppt
002	☐	Jurkiewicz, Clifford	On-Screen	Create	15	1	15	6/12/98	5:00 PM	Std	create show
002	☐	Jurkiewicz, Clifford	B/W Prints	Output	15	1	15	6/12/98	5:00 PM	Std	add tag

Unpaid Invoices Report

Report Range: May 1, 1998
through May 31, 1998

Invoice	Date	Project	Billed to	Contact Name	Subtotal	Tax	Outside $	Total
001053	5/10/98	UPM00012	Company 43	Persons Name	$317.00	$19.02	$13.00	**$336.02**
001054	5/10/98	KAR00050	Company 3	Persons Name	$88.00	$5.28	$0.00	**$93.28**
001055	5/10/98	KAR00051	Company 3	Persons Name	$40.00	$2.40	$0.00	**$42.40**
001047	5/10/98	HEM00011	Company 8	Persons Name	$150.00	$0.00	$0.00	**$150.00**
001096	5/18/98	CMC00020	Company 5	Persons Name	$80.00	$4.80	$0.00	**$84.80**
001084	5/18/98	CMC00025	Company 5	Persons Name	$331.00	$19.86	$30.00	**$350.86**
001085	5/18/98	CMC00027	Company 5	Persons Name	$66.00	$3.96	$0.00	**$69.96**
001086	5/18/98	CMC00009	Company 5	Persons Name	$253.00	$15.18	$13.00	**$268.18**
001088	5/18/98	CMC00014	Company 5	Persons Name	$299.00	$17.94	$30.00	**$316.94**
001089	5/18/98	CMC00016	Company 5	Persons Name	$627.00	$37.62	$30.00	**$664.62**
001090	5/18/98	CMC00022	Company 5	Persons Name	$218.00	$13.08	$30.00	**$231.08**
001091	5/18/98	CMC00023	Company 5	Persons Name	$79.00	$4.74	$13.00	**$83.74**
001092	5/18/98	CMC00011	Company 5	Persons Name	$332.00	$19.92	$30.00	**$351.92**
001093	5/18/98	CMC00012	Company 5	Persons Name	$218.00	$13.08	$30.00	**$231.08**
001095	5/18/98	CMC00015	Company 5	Persons Name	$1,161.00	$69.66	$30.00	**$1,230.66**
001097	5/18/98	CMC00021	Company 5	Persons Name	$262.00	$15.72	$0.00	**$277.72**
001098	5/18/98	CMC00026	Company 5	Persons Name	$117.00	$7.02	$0.00	**$124.02**
001099	5/18/98	MES00056	Company 9	Persons Name	$10,179.47	$610.77	$1,261.00	**$10,790.24**
001094	5/18/98	CMC00013	Company 5	Persons Name	$555.00	$33.30	$30.00	**$588.30**
001102	5/20/98	KAR00052	Company 3	Persons Name	$375.00	$22.50	$0.00	**$397.50**
001138	5/28/98	CMC00029	Company 5	Persons Name	$223.00	$13.38	$30.00	**$236.38**
001144	5/28/98	CMC00034	Company 5	Persons Name	$849.00	$50.94	$30.00	**$899.94**
001143	5/28/98	CMC00017	Company 5	Persons Name	$495.00	$29.70	$43.00	**$524.70**
001142	5/28/98	CMC00036	Company 5	Persons Name	$230.00	$13.80	$30.00	**$243.80**
001141	5/28/98	CMC00031	Company 5	Persons Name	$455.00	$27.30	$0.00	**$482.30**
001139	5/28/98	CMC00032	Company 5	Persons Name	$308.00	$18.48	$30.00	**$326.48**
001145	5/28/98	LLA00009	Company 34	Persons Name	$160.00	$9.60	$0.00	**$169.60**
001137	5/28/98	CMC00028	Company 5	Persons Name	$206.00	$12.36	$30.00	**$218.36**
001136	5/28/98	CMC00018	Company 5	Persons Name	$1,256.00	$75.36	$60.00	**$1,331.36**
001140	5/28/98	CMC00033	Company 5	Persons Name	$92.00	$5.52	$30.00	**$97.52**
001148	5/29/98	VGI00283	Company 1	Persons Name	$0.00	$0.00	$0.00	**$0.00**
					$20,021.47	$1,192.29	$1,823.00	**$21,213.76**

Chapter 14: FAQs

Below is a listing of frequently asked questions. These may assist you in troubleshooting any difficulties you may be having.

Q. I changed one of my clients from taxable to Tax Exempt by clicking the Tax Exempt box in the Client Management Screen but when I try to invoice a project for this client, the invoice still adds tax. Why doesn't the Tax Exempt status doesn't take affect?

A. After you click on the Tax Exempt box, you must move forward or back to another client screen. You can now go to the Invoice Screen to create a Tax Exempt invoice. You must always move forward or back one record to affect a change throughout the system.

CHAPTER 15: TECHNICAL SUPPORT

There are several means by which you can gain technical support, troubleshooting assistance, answers to your questions and general help. For simple assistance with features and functions, click on the colored boxes on the Control Pad to view the built-in help tours. The Axis 98 web site, www.axis98.com, is constantly updated with the following items that will assist you.

1. The FAQs section of the web site is constantly added to better address possible scenarios you may be encountering.
2. The most current version of the manual, including the latest updates and additions, is always available as a free download, to better assist you.
3. Minor updates and enhancements included in the most current version of Axis 98 is always available as a free download to registered users. By integrating an updated version of Axis 98 you will not lose any of your current data.
4. You can e-mail questions and suggestions to ds@ddii.com This is always a free service. Please allow 4 to24 hours for a reply.
5. You can receive customer support by calling 610.667.5425. You are limited to 2 free calls. All calls thereafter are on a pay-per-incidence basis. The cost is $50.00 per incident and you will be charged once we determine the problem has been resolved.

Chapter 16: Glossary

The following list of terms are used throughout this manual and Axis 98 to describe functions and procedures. This glossary is provided as a quick reference to define confusing terminology.

Record: An individual screen that is stored as separate data file. Each project, client and invoice is a separate record and is assigned a record number.

Record Selector: thin, vertical gray bar on the far left side of every record. Click on this the delete or copy the entire record.

Single Record Selector: gray box on the left side of individual line items, rounds etc. click on this to delete or copy the individual line of data

Round: Term used in the Project Management Screen to used to designate individual steps of a project, labeled numerically. See Chapter 10.

Net Sales/Revenue: Invoice total less sales tax less “Outside Costs”; A truer picture when determining profitability of a project. See Chapter 11 - Advanced Features

Outside Costs: additional expenditures absorbed by the company that detract from the profitability of a project. Examples are as follows: Couriers, Fed Ex, printing, photography, freelance employees, etc. Any additional services the Company must pay for that are above and beyond normal materials. These items are left to the discretion of the business owner or general manager. See Chapter 10 & 11.

Data Range: The start and end date of any calculated report as month, year and day. See Chapter 12.