After Hours Consulting

presents

Expert Consultant™

Managing Your Business

Expert Consultant Owner's Guide

v. 1.2.6 October 22, 1999

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Expert Consultant, v 1.2.6

Hello, and thank you for using Expert Consultant for the Macintosh. This is a database designed to make the life of the SOHO consultant or business owner easier by tracking the information we need to conduct our business.

The enclosed files were written in FileMaker 4.03, but have been tested successfully on FMP 3.05 to 4.12. The database itself is a standalone product, but without a full installation of FileMaker, some features such as spellchecking will not be available.

This demo will work for a limited period. If you elect to upgrade to the full commercial version, you may do so without loss of data or duplication of effort. The database will simply fail to permit the addition of new records or printing after a certain timeframe. All other features will continue to function. Expert Consultant (EC) should save you thousands of hours of development time, giving you a useful immediate solution to billing your clients or selling your goods in the small business world. We are always looking for ways to improve EC, and your input counts, so feel free to drop us a line. We'll carefully consider all responses. Our email address is:

Sales@AfterHoursConsulting.org

Conventions used: Please refer to the Glossary for terms which may be unfamiliar. We present screenshots here that may not exactly match the screens you view in the current version of EC. Some color schemes, layouts, features and button locations will change during development. The remainder of this document is a help guide (also under development), explaining concepts and features within the software enclosed. Thank you for taking the time to download this package and explore what it has to offer. We look forward to hearing from you in the future.

Paul S Vail
Owner, After Hours Consulting

Note: Documentation accompanying demo copies do not incorporate screen shots.

Expert Consultant, About the Help Guide

Expert Consultant (EC) consists of a collection of files which interrelate information about your company, the clients you service, the vendors from whom you purchase, your products, billing invoices (AR), purchase orders and expenses (AP), your employees and their timecards, and links to support information from other available FileMaker Pro databases.

If you downloaded the demo, this database is empty, and you will need to fill in some information regarding your company and yourself to get started. A full version of EC is available on CD. This version contains over a thousand products, 700 vendors, 30,000 zip code references, and additional source material to help you get started that much more quickly in your business. Please contact us via email or telephone for additional information or current pricing. Network version licenses are also available.

Necessary and recommended hardware

EC will run on any Macintosh system with at least a 68020 CPU (Macintosh II) and System 7.0.1 with at least 8 Mb of RAM installed and 10 Mb free hard drive space. The All-in-One original Mac with the 9" screen may find our extended layouts difficult to view. Networked versions will run on LocalTalk, EtherNet, IP, Apple Remote Access, and mixed networks, and are cross-platform capable with Windows NT (32 Mb RAM minimum, 10 Mb free hard drive space). The appropriate FileMaker files should be installed from your master copy of FileMaker Pro. Presently, FileMaker Pro 3.0.5 or higher is supported.

While we understand some companies have chosen to use Windows-based machines in computing environments, these machines typically require far more overhead in terms of support, total-cost-of-ownership, and troubleshooting. This may come as a surprise to our Windows users, but unfortunately the claims made by many IS support personnel are not borne out by the facts. In a business operation, a Windows-based machine will end up costing two to three times as much in terms of hardware and support as a Macintosh system over the predicted lifetime of an EC version installation (six years).

You will find EC more enjoyable to use with FileMaker Pro 4.1 on a PowerPC system with a minimum of 32 Mb of RAM installed, running OS 8.1 or higher. Monitor settings for at least 640x480 resolution and a color depth of 256 colors minimum. The recently released iMac or iBook is an ideal platform solution for standalone or network solutions. Network systems using Ethernet 10baseT or higher will greatly enhance your operation. We strongly encourage you to **make frequent backups of your database**, preferably on a daily basis. There are many low-cost methods for maintaining backups. Please contact us for more information. EC is completely compatible with all backup media, provided there is enough capacity on the media volume for your files.

Your software license permits an unlimited number of backups; however, only one copy of EC may be installed and used at a site unless you have purchased the network license.

Only the basic fonts supplied by Apple Computer were used in the development of EC. Some fonts, such as Helvetica, have equivalents on the Windows platform (Ariel). Fonts such as Charcoal currently unsupported by Windows are not used in EC.

Printing conventions: Due to variations in margins and commands from printer to printer, we have permitted user control over many print dialogs on-screen. All print layouts are designed to conform to a page size of 8.5 x 11 inches (US letter) with margins set to .45 inches on a side. When a print button is selected, the user will be asked to verify page setup information and the print command, where appropriate.

Database notes: FileMaker Pro is a robust cross-platform relational database. But, like all software, there may be undocumented bugs and problems. Please bring these to our attention when you encounter such a bug. FileMaker Pro is very sensitive to corrupted fonts. Should FileMaker Pro hang during the launch of the database, first suspect a bad font file and take corrective action to remedy the problem. The easiest way to trouble-shoot a corrupted font is to reinstall your basic fonts, restart the computer, and try launching the database again. To avoid unnecessary complications during font troubleshooting, deactivate such font handling software such as MasterJuggler, ATM Deluxe, and Suitcase prior to your restart. OS 8.6 users must install the Font Manager update available from Apple's website for reliable operation of their computer, including EC.

If you are installing the demo, and are not already an owner of FileMaker Pro, the spell-check feature may not be available for your use.

Installing EC

If you are reading this help guide after downloading our website demo, then you have already installed EC on your hard drive. You need only make sure that you have added the two EC extensions to your system folder (and restart your Mac). The database is decompressed at the same time as this guide, so no further installation is necessary. If you are reading the Acrobat documentation or paper copy that came with your CD, then follow these instructions for properly installing EC on your hard drive.

Macintosh: Insert the CD into your CD drive. Open the ECmac folder. Copy the EC folder from the CD to your hard drive.

Windows: Insert the CD into your CD drive. Select the CD drive (often Drive E) and open the contents of the CD. Open the ECwin folder. Copy the EC folder to your hard drive.

Read the README file for late-breaking information on EC. Refer to the Glossary at the end of this document for terms that may be unfamiliar.

Launching Expert Consultant

(image)

To launch the EC database, open the EC folder and double-click on the ExpertConsultant file.

When this file is launched, the software will check for your EC license and open the Setup.fp3 file. Unregistered versions require that you enter the setup information with every launch. Much of this information is used in creating your printed billing and purchase documents, along with specialty pages that are included with the demo. The setup screen will also request that you register your product with us. Registration not only removes this reentry requirement, but it entitles you to technical support for your product. More on the registration process in a moment.

Setup of Expert Consultant

If you are upgrading from an earlier version of EC, please read the section on upgrades and **Importing Data** before continuing. This will save you many hours of data re-entry.

EC requires some company-specific information to operate properly. During the setup process, you will be asked to provide this information for the database. The database creates customized billing layouts using your company information at the header, footer, and within the body of many printable layouts. To provide this information, EC has a series of interview screens that you are taken through for entering in your information. If this is the first time you are opening a registered copy, or this is an unregistered copy, EC will automatically open with the interview. If you are already an EC user, you may select the Setup option in any Help window.

Setup: Company Information.

The interview process begins with the following introductory window:

(image)

Please note:

1. If you are upgrading from a previous version of EC, you should select Import.

2. If you are new to EC, you should select Continue.

(3) Or, you may quit by select ing the Quit button.

Selecting the Import button takes you to a special screen for inporting your data from a previous/demo copy of EC. Please turn to the appendix section on Importing data now. Selecting the **Continue** button takes you to he first step in the setup interview, where you provide basic information about your firm. Enter the following information in the appropriate fields. An example of your setup screen follows:

(image)

Note the examples of company information provided to the right of the fields. To start the process, press the **TAB** key. Your cursor will be taken to the Company Name field, where you should enter in the legal name of your firm. Press **TAB** again, and the cursor moves to the Company mailing address field. Continue to **TAB** through the page, entering the proper information. When you have completed this page, select the Continue Button to bring up the next page in the process. Note that you may also return to the previous page with the **Previous** button.

(image)

This page permits the entry for a company "nickname", or the common name for a firm. Most firms have an alternative name by which they are known, from "IBM" to "After Hours". Our paperwork reflects this duality of business, and provides for more appealing printouts.

Enter your information,.then select the **Continue** button.

(image)

Company financial information is also stored within EC. The FIN is used on the bottom of invoices for reference. If you are a sole-proprietor and use your SSN, we do not recommend that you put your SSN in this space (to protect your privacy). This number is only necessary for the issuance of Federal 1099 forms at the end of every January from clients that you bill, and the FIN is supplied to them on every billing for their records. FIN numbers are not subject to the same abuse of privacy as SSN numbers, so their publication does not jeopardize your privacy. You may want to explore the current laws regarding 1099s and who is required to file them for your own accounting records, particularly if you subcontract work, pay interest to a non-commercial lending party, or lease from a non-corporation.

Select the **Continue** button for the next page in the interview.

(image)

Your state sales tax number is also recorded by EC, along with the state tax rate to be collected on material goods. You should enter the rate, as this value is used by your invoicing files to properly calculate the amount to be retained for the state. Failure to collect sales tax does not go over well with the Department of Revenue, and you may be liable for the amounts you fail to collect and report should your business be audited, along with some nasty fees. Sales taxes are generally passed on to the client, and should be noted in the Billing Invoice (and stated upfront whenever offering a quote for products). Sales tax laws vary greatly from state to state. While we have developed EC for general use, our home state guidelines do not levy a sales tax upon labor, consulting or travel time billed when these charges are maintained separately on a billing. EC follows this format, with extensive detail on billing output.

This concludes the basic background information for your company. Selecting the **Continue** button will display a summary of your entered information.

(image)

Review what you have entered, and select the **Previous** button if you need to go back to make corrections or changes. If the information is correct, select the **Save** button.

When the **Save** button is selected, you will enter the second half of the setup interview. See the next page.

The second half of the Setup process permits you to enter data for each of the modules in EC that require custom tailored information. The interview will continue by asking you specific information for each file. Select SAVE and proceed.

Setup: Billing and File Information.

Your Billing invoices need to know your billing rates, terms you specify for bill collection, and footers for the bottom of invoices.

When you select the Save button from the first half of the interview process, the next window to be displayed is presented below:

(image)

EC supports three different business models: the Contractor, the Retailer, and the business which bills both for by time and products. Determine which category your business falls into, and follow the on-screen instructions for setting that category here. Note: presently, EC will permit you to return to this setup window to change your designation in the future if necessary. Press the TAB key to bring up your choices, select the proper classification, then click on the HERE link to enter that choice. Select the Next button to continue with the Billing Invoice interview.

If you chose the Retailer classification, skip the next section and continue on to the Billing footer section. Contractors or "Both" businesses should continue on…

(image)

If your classification is either the Consultant or Both category, your next interview screen is for setting up your billing rates. The screen is simple: Most consulting practices provide reasonable support or service contracts for their clients, with time purchased in advance for a discount sum. EC takes this practice into account with a precanned support contract (available from within the Billing file). The amount for that contract is provided from information you enter here in the Support Contract Cost field. If you do not offer a support contract, leave these fields blank.

Your standard billing amounts for Labor, Consulting, and Travel time are also entered in the appropriate fields. Select the **Save** button for the next window in the process.

(image)

If you have purchased the Inventory module of EC, EC will activate the inventory modules. This field cannot be modified – but should agree with your purchased license. If it does not, please contact us immediately. You will not be able to take advantage of our built-in inventory system otherwise. Select the **Continue** button to continue.

Once you have filled in all of the appropriate fields for the Setup interview, EC takes you to the Start page. This page permits you to print out a copy of your entered information for registration, edit entered information, start EC or **Quit** from EC. This menu is presented on the screen:

(image)

If this is your first time launching EC, you should print out your registration information, and submit it along with your payment to After Hours Consulting. To do so, select the **About EC** button. When selected, EC will show a window with an explanation of how to print your registration form, with these buttons at the bottom:

(image)

If you have not already done so, go to your Chooser (under the Apple menu) and select your printer. Then, click once on the Print button to print out your registration information. Some additional machine information will be collected on the printed sheet. Mail this sheet with your payment to our mailing address:

After Hours Consulting
PMB 167
5910-129 Duraleigh Road
Raleigh, NC 27612

Alternately, you may fax directly from your desktop, if you have the appropriate software installed and select the proper driver within the Chooser. Faxing does not permit you to correct or add information to the registration form, and the registration process will not commence until your payment has been received, but for ownership verification, this process has timely advantages. Our fax number is **810-816-6707**. You may also wish to print out a copy of a registered version of EC for your records in the event that you need technical assistance. Your registration number (serial number) is required for technical assistance.

Return to the Start window with the Continue button. To launch EC, select the Start button

(image)

<u>Starting EC for the first time.</u>

When you select the Start button in the Setup file, a number of events occur which help EC function properly. This cascade of actions are necessary maintenance operations. You will see on screen several new dialog messages appear. At this time, EC will also update any records in the data base with the current date and time. (With established copies of EC, you may have a brief pause while EC conducts this calculation – this is normal and runs once a day for files which have not been opened on that day).

If you are a new EC user, and you did not purchase our commercial package with data, your EC is pretty empty. Since EC does not know whether you are upgrading from a previous version of EC or not, each principal file in EC will give a warning message that there are no records contained within any empty files.

(image)

Critical files will then offer you the opportunity to import data from previous files when those files are selected! Once all of the files have been loaded into EC, you will see the Message file on your screen, in its Navigator mode.

O.K., so we are hitting some symantecs here. In English: EC will always open to the Message file. The Message file is one of the six primary files you will work within. The six principal files are:

(image)

However, these files are supported by information held within a variety of other EC modules. For example, Clients relies upon the POC file for all of its Client contact information; if you are using an inventory system, both Purchase and Invoice rely on the LineItems file for data; with or without an inventory system, these files rely upon the Employee file for order entry; Messages also relies on the Employee file for message entry, and so forth.

When the Message file opens, it offers a menu to access these hidden, but important, files. What does that have to do with the string of warning messages you see when you first launch EC? In this case, EC is telling you that there is no data in these files. If you had information from another database or an older version of EC, there should be a way to enter in that information without having to suffer through days or weeks of typing. Well, there is. We call it the Import windows.

Let's examine what happens when you select on a file without any records. If you open the Clients file from the Navigation bar (the row of buttons at the top of the screen, like our example above), the Clients file opens to an introductory screen regarding importing. As Clients contains no records, you may follow the importing instructions or bypass the import process. Read these screens carefully. If you are upgrading from an earlier version of EC, follow along with the next section.

Importing data

If you have existing records from a previous version of EC that you wish to import into this version, you will need to access EC using the administrative password to activate the import feature. To do this, you should be sure that the database is not open (Quit from FileMaker or from EC). Then, hold down the option key (Macintosh) or command key (Windows) while double-clicking on your setup file. Keep the key down until you are asked for your administrative password.

Simply follow the on-screen instructions to start the import. We recommend that you print out a copy of the instructions for reference during the import process. The critical points to remember are these:

1) If you are importing from another FileMaker file, such as an earlier version of EC, you should first open the source file (that file from which you will import information) and FIND ALL records you wish to import. Failure to do so may result in an incomplete importation. EC will only import the records that are readily available from a previous version file. For versions prior to 1.1.1, you should verify each file individually. Version 1.1.1 and later automatically prepares your files for import simply by launching the old EC (v 1.1.1 to present), then quitting from it.

2) If you conduct the importation more than once, you may end up with duplicate records in some or all files.

3) Importing should not be cancelled once it is begun. Data corruption or loss may occur.

4) Review your selection in the import window carefully, so your information ends up going in the proper target (destination) fields. With newer versions of EC, we recommend always selecting the Matching Names choice, then verifying each field match throughout the list before conducting the import.

(image)

Note the items in the left side column. These are the fields from the source file (called billing invoice in this example). The fields in the right column are the destination fields in the file you are importing into. The arrow between adjacent fields [client -> client] indicates that this information will be transferred. A dash [- -] indicates that the target field is not modifiable (maybe a calculated field). You may toggle from arrow to dash by single-clicking on the appropriate arrow / dash. You can only import if you have started EC by using your administrative password. If you have forgotten your password, contact us by email or telephone for assistance.

Note: If you are importing from a database which does not offer selectable POC (point of contact) files or support for multiple contacts within one client (EC beta 0.92 and earlier), you may need to import your existing client file into both the new Client file and the new POC file. With the changes incorporated with EC from 0.93 and later, only one Client name is necessary for proper indexing of multiple contacts within that organization. The client name must match exactly within the client fields in both the Client and POC files.

Older versions of EC may have slightly different field names, as some fields were found to contain blank character spaces in their name. These fields have been corrected, but may not align automatically during the import process.

Opening an empty file will activate the import feature automatically. Billing invoices are arguably the most important file of your database, as this is your bread and butter. Reread our recommendations on making backups now (consider how important your invoice data is to you). Some users prefer to start with a clean slate rather than import old data. This is fine, but remember that certain files will not permit transitions from one layout to another unless there is data to view. You may need to make a new record prior to exploring a file – a blank or “dummy” record will help with your introduction to EC.

Import options are available for all EC modules.

Using Expert Consultant

Launch EC by opening the Setup file. After the title screen appears, select the Start button to launch the support files for EC. You will then be presented with the contact manager for EC, called Message.

Navigator bars and getting around -

Message permits you to track contact information within EC, such as when a client or vendor was called, how long the call lasted, and so forth.

(image)

We will use this window to teach the basics of getting around in EC. When Message has loaded, the Message file screen opens to a navigator window, as shown above. Nearly all files will use the same navigation (Nav) bar at the top of the screen, and the pertinent information for your business operation will appear in the black portion of the window below the Nav bar. For instance, here we have the top navigation bar which permits us to select related files of interest, such as our **Clients** or customers, **Purchase** orders or expenses, billing **Invoice**, **Vendors** and suppliers, **Products** (material goods for sale or resale), and **Messages**. An underlined item will often permit us to move to a different layout within the same file. Note: you may quit from EC at any time by selecting the **Quit** button. Doing so will save all information and changes you have made to that point.

The second tier of buttons permits us to review and conduct operations on the currently opened files. Here, we see buttons to permit the creation of a New message, four arrow buttons for navigating among messages, and additional buttons for Finding information, Printing information, creating one-page letters for clients, accessing the on-line help file, and closing the file.

We'll return to Message shortly. The next section will review all of the major files to EC in the order listed in the Navigation Bar.

Clients, the customer manager

The way we make money is by giving our customers goods and services at fair prices to the fullest of our abilities. That usually means being knowledgeable, well-trained in our service field, up-to-date on all of our products, and being prompt and courteous with our clients. We remain in business for only one reason in the end: our clients. This is true whether one is a computer consultant, shop owner, or manufacturer. Keeping records on our clients helps us do our job with better accuracy, speed, and completeness. EC helps you do this by having an integrated Client file available at all times.

(image)

By selecting the Clients button, the Clients file is brought to your screen.

Note the top navigation bar is consistent with the one you see in the Message file. The second nav bar permits you to perform actions on the presented record. Fields beneath the nav bar present information about existing clients. It is important to note that only a few of the fields in this window permit you to edit the file. This protects against accidental editing or changing of the file. Your records have to be correct, with accurate information. To keep all of your records exact, EC has certain safeguards built into its data entry format. EC is very specific in how it will list information, and if one were to alter the name of the company by just a little bit (perhaps an extra space), EC would consider that listing a separate company. Why is this important? Well, for example, EC will only list employees of your listed client if the client name matches *exactly* with the listings in the POC file. Altering either the listed Client name here, or the Client name for a POC in the POC file, would create a mismatch.

Here, we have a listing for a company. Let's look at what each portion of the screen means. On the left side, we have fields that list all contacts we have made with the company, refered to as principals, or Point(s) of Contact, POC.. In the center of the screen, more detailed information about the selected POC is displayed. The right-hand side displays a picture of the POC. Below these three sections are file tabs which display additional information about this client and POC.

Let's examine each section a bit closer. Look at the left side of the above example. As this company has done business with us in the past, we have them listed as a "*Client*" just left of the company name (*After Hours*). Beneath the Principals label, all employees we have entered for this company are listed (there are only two here). To view information on a specific POC, select the desired name button in the principals listing. That individual's information will appear in the center of the screen. If there are more than eight POCs for this client, you may activate a scroll bar to view additional listings by selecting the Scroll arrows. To edit an individual POC record, select the desired individual, then click anywhere in the center area where the POC data is displayed.

Sincewe have selected one of the available POCs listed, the center of the above example shows name, address, phone numbers, email address, and web site information. Some businesses prefer to have a picture of a client, a POC or even a business card or logo available, so the right side of the example displays this if it was entered when the POC was added to ExpertConsultant.

Let's take a closer look at the bottom half of the Client file, where the most useful information resides. This is set up as a series of file tabs. Clicking once on the desired tab brings that information to the screen. (Your labels may vary, as this information is entered by you when EC was set up the first time. You may alter some of these labels by returning to Setup and selecting the Edit feature).

Customer Information

(image)

Client opens up automatically to display the CUSTOMER INFORMATION for the selected POC. During the SETUP process, you are asked to name the CUSTOMER INFORMATION column headings (column A and B). Here is where they are displayed on the left and right, respectively. Note: the information contained in each column is only displayed here. You enter this information in the POC file when you create the record for this particular POC. This is done to protect the integrity of the information from accidental alteration. And if you have already created the client record and you wish to edit it, simply click on the space you want to enter. EC will take you to the proper file. What do you use Customer Information for? Maybe you want to record the names of your customer's children or pets, their anniversary or birthdate. These fields are references for whatever use you decide. EC is designed to be flexable for your needs.

In our computer business, it helps to know what computer hardware and software our clients use, so we record that data here. This is invaluable when offering telephone support or resolving warranty issues with vendors. Knowing the principal software titles a client uses is helpful, too. And, since clients sometimes misplace their registration information (especially when they need to reinstall that important application), there is room to record this information, too. How you use the Customer Information tabs is up to you.

Invoice History

(image)

Selecting the INVOICE HISTORY tab presents all billing invoices and quotes for a client (not just a POC, but the Client listed). Note the View button on the left side. Clicking on this takes you directly to the listed invoice. Reading left to right, the column with the capital letter represents what kind of invoice record is listed (Q=Quote, B=Billing, R=Rental). The column of lower-case letters indicates if the invoice is unpaid (o=open) or paid (p). The invoice number and date are listed in the next two columns. The Hrs column shows the number of hours billed for labor or consulting. The number of contract hours is listed for clients with support contracts. The total amount of the invoice is listed beneath the $ sign. And the beginning of the invoice comment field is listed. If more than seven invoices are listed, the scroll bar will permit viewing additional invoice records. Invoices are listed in reverse chronological order from the newest backwards.

Messages

(image)

Selecting the MESSAGES tab brings up a list of all messages related to the selected POC. As with the INVOICE HISTORY tab, one can select the View button on any message to open that individual message. Also listed here is the date the message was created, the status of the message, and a portion of the body of the text within the message. If more than nine messages are listed, a scroll bar is available to view additional messages. Messages are listed in reverse chronological order from the newest backwards.

Notes

(image)

Selecting the NOTES tab presents a text block for recording additional notes about the POC for this Client. Should you need more space than is presented, the NOTES text area will automatically present a scroll bar for viewing information that runs off the page.

Rates

(image)

Selecting the RATES tab brings up the billing rate assigned to this POC. When you set up EC, you Under Billing Information, the hourly rate is recorded in dollars. If you charge a travel fee but waive it for clients that are located reasonably close to your office, you may set the Travel Fee to **No**. Clients who qualify for a travel fee (**Yes**) are billed whatever travel time you elect to charge (in the **Billing** file – see *creating a new invoice* in the **Billing** section).

Tax information for clients. Very few clients qualify for true tax exemptions. Certain non-profits are examples. If a client is tax-exempt, you may record that information in their POC record(s). That information is required by the Department of Revenue of most states, and may be viewed here. Certain localities also charge excise taxes based on whether a client is within a local municipality. We’ve created a City Limits tag here for tracking such clients.

If a Client has purchased a support contract, the remaining hours on their balance is listed here. This is a “global” number, and not linked to any one POC, but reflects the balance for the company as a whole.

Additional background information is available, such as when the POC record was first and last altered. Our firm has often treated clients who act as referral sources with preferential treatment. They are looking out for our best interest, and it is only right to return the favor. Here, clients listed which provide referrals often are invited to our annual client appreciation festival. A list of those events is also maintained.

All billing information for new POCs is automatically entered when you create a new POC, based on what you enter in your setup parameters. Existing client billing rates are not automatically updated, and should be periodically reviewed should your terms change over the years.

Support Info

(image)

Selecting the SUPPORT INFO tab presents a listing of some currently canned layouts that provide our clients with useful information. For instance, to present our terms and hours, we supply one format for our civilian clients and a more business-like format for our commercial clients. Basic information regarding surge protection, our CD archiving service, support contracts and more is listed. To print out any one of these form sheets, simply select it's button. To view the form sheet without printing it, select the checkmark button adjacent to the item. EC will record the date you printed out each sheet for future reference.

Additional help guides are available in the right-most column. We'd be happy to tailor your own specialty one-page layouts (up to three per registered user). Simply contact us for additional information.

Adding or Editing the Clients file.

Selecting the Edit button.

Within any Clients normal layout, if the Edit button is selected, the user is given the opportunity to edit existing POC listings for a client, add new POCs to an existing client, or add a new Client. Selecting the Edit button brings up the following screen:

(image)

There are three buttons to this screen: **New**, **Add**, and **Delete**.

To begin the process of adding a new client, select the New button.

To add a new POC to an existing client, be sure the Client is listed on the left side (all current POCs for that client will be listed below the client name), then select the Add button. If the proper client is not listed, select your desired client by clicking on the existing client and choosing from the popup menu.

The Delete button permits you to delete clients or POCs, but is only active with the administrative password.

More details about this process are given on the following pages.

Adding a new Client to the file.

Select the New button. This adds a new Client record to the file. You will be presented with the following screen:

(image)

Type in the Name of the new client in the field, as shown above. This is the name of the company, or if you service private individuals, the surname of the family. We recommend that you adopt some convention at your facility for naming civilians. We use the following:

If Joe Smith became a customer, we would check to see if we had serviced any Smiths prior. If so, then Joe would be added as a New POC to the existing Smith file. Since each POC is a distinct file, we don't need to worry about mixing up the Smiths – we simply select the proper Smith from our list in the other features of EC. If Joe was our first Smith, we would treat him as a new client, and in the window above, we would enter in **Smith family** as our prospect. The "family" tag presents a simple reminder that we are dealing with a private family and not a company.

To continue with the interview process, select the Continue button. This would present the screen for adding POCs (see next page).

Adding a new POC to an existing Client.

Select the Add button. This adds a new POC record for the selected client, with blank fields for the POC name and related information (email address, phone extension, and so forth). You are then asked to confirm the client name you which to make an addition to, as shown below.

(image)

Many of the fields may autofill to save effort with re-entering such information as address and contact numbers, leaving only the name, occupation, and internet data empty. Fill out the appropriate fields by entering your information in each box, then selecting the TAB button to move to the next field. When you have finished with this screen, select the Continue button.

You are next asked if you have a scanned image of the POC (or perhaps their business card) for EC to file. If so, put the image file somewhere readily accessible to the hard drive such as the desktop, and then follow the import instructions. Select Done when you have finished.

PURCHASE, the expense and purchase order manager

The PURCHASE file is used to track all purchased (AP) for EC. Whether you use an inventory system or not, you want to know how much money is spent on maintaining your business. PURCHASE communicates with PRODUCTS, EXPENSES, and VENDORS primarily, so you will need to become familiar with those files to make the most of PURCHASE.

If this is the first time PURCHASE is opened, you will be given the option to import existing data if you didn't import your old data during the setup process. Follow the instructions for that process, or see the section on importing in this guide. When PURCHASE is opened, the following screen is presented:

(image)

This screen will present the first purchase recorded in the above window. This screen will be referred to as the purchase browser, as it permits browsing of purchases, but no serious direct editing. This protects records from accidental alteration.

The Screen is broken up into three sections. The upper left section gives information about the vendor from whom the purchase was made, along with some payment and shipping information. The upper right shows the purchase order number, status of the purchase, and pertinent dates. You may use the Nav bar to mark an order received and use the Paid button to mark an order paid.
Note that you may also review inventory (if used), print a copy of the PO, preview the printed copy (View Output) and view a quick listing of all POs in the current found set, or outstanding POs. If you have no records in the file, and did not import records, you will be asked to select the Edit / New button in the Nav bar. This will allow you enter in a new PO.

Creating and Entering a New Purchase:

Selecting the Edit / New button in the browser layout reveals the following window:

(image)

Note that the window has an abbreviated Nav bar, and file tabs for the four steps in the process of placing an order. To facilitate the order entry process, you should already have the Vendor information entered in the VENDOR file, Product (or Expense) information in the appropriate file, and yourself listed in your Company employees file. [Only managers may alter the Employee file.] If you do not have the information entered, the PO interview process will provide buttons to access the necessary support files when appropriate.

To begin a PO entry, select the New PO button (for material purchases) or the New Expense button (for company expenses which will not be tracked in inventory. A pulldown menu of all available vendors will appear. Select your Vendor. If the desired vendor is not listed, select the Vendor button to access that file, and create a new Vendor -- or press the delete button and manually enter in the Vendor name. [Manual entries are not stored in the Vendor file, but will be linked to this record only.] Press return. Enter in your name, or select it from the pulldown menu of available Employee list. Verify the account representative and contact information for the vendor. Note the order method by which you place the order.

Note: If a new record is created in the wrong category (e.g., the New Expense button was selected when the New Purchase button was intended), clicking on the Edit Mode label just about the Vendor selection field will toggle the type of AP category.

Next, select the PRODUCTS file tab to proceed to the next step in the order process.

(image)

If you are using an inventory system, the above screen will appear. To add a material good to the PO, select the Add Item (+, plus) button to the left of the Items list. This will present a pulldown menu of all listed products in your PRODUCTS file.

Note: If you need to add a new product item not already in your Product list, do this prior to selecting the :

1) Select the Items, Products & Such (COGS) button, COGS means cost of goods sold)
2) Add your new item to your Products list.
3) Return to the Purchase file to complete your purchase.

To add a line item to this purchase:

1) Select the Add Item button.
2) Select the appropriate item from the pulldown menu
3) Press the RETURN key
4) Verify the cost per for that item (individual cost)
5) Enter quantity of items purchased
6) Mark who the item was purchased for under the Client column (optional).

Select up to eight items, then proceed to the Shipping / Notes file tab. EC permits lineitem deletion for entry mistakes by selecting the delete button for that line item.  Be careful, entry deletions cannot be undone!

If your purchase requires more than eight items, select the EXPAND button in the lower right corner. EC permits the entry of up to sixteen purchase items in the Expanded purchase mode. The following screen is presented when the Expand button is selected.

(image)

Non-inventory users of EC will see a similar screen below:

(image)

The shipping information window is filled out in a like manner: select the payment method and shipping method (administrators may change or add to these pulldown menus), enter in order and tracking references, cost of delivery, taxes, insurance, and note the shipping date (select the button for today’s date). Notes regarding the purchase may also be logged here. Advance from one field to the next with the TAB key.

(image)

Select the Totals Review file tab to review the PO:

(image)

Select any file tab to return to that section for editing. Select the Done button to return to the PO Browser window. Purchases may not be edited from within the browser window. All changes must be addressed from these four file tab selections.

If the purchase was not material goods, but rather an expense, you would select the New Expense button. Most of the file tabs within the order entry process are the same as those used with a PO purchase; however, the Products window lists a collection of precanned expenses. These expenses and their related fields may be viewed and edited from the EXPENSES file by selecting the Office Expenses button.

(image)

To enter an expense, press the TAB button to present a pulldown menu of listed expenses. The commercial version of EC comes with a collection of Expenses with representative tax identification information. This information is fully editable from within the Expense file. Continue with the TAB button to advance to the next field. To return to a previous field, select it with the mouse, or Shift-TAB to retreat to the previous field.

Select Shipping / Notes or the Next button to continue with the order process (presented above).

Purchase Quicklist

Selecting the Quicklist button presents all of the current records you are browsing in your found set as a list. The first client and item is listed, along with the vendor, PO# and total amount of the purchase. The list is in a scrollable format to permit use of the scroll bars in viewing items displayed below the screen. You may expand the view any of the listed purchase records by selecting the View Record icon on the far left of that line item. To return to an individual record, single-click on any field for that record, then select the PURCHASE button in the Nav bar.

(image)

The expanded view button returns you to the record adjacent to the button you select.

Printing a Purchase

Selecting the Print button from the Nav bar presents an expanded dialog box:

(image)

Select what type of output with the appropriate button.

• The Print PO with payment information will print a sheet with all payment information, including credit card information.

• The Print PO without payment information replaces the payment line with the word “Confidential”.

• The Print Packing Slip will print a page with the vendor’s name and address, along with your address as the return address.

• Exit will return you to the purchase browser.

BILLING, the billing invoice file.

The Billing file is used to generate and track all billable invoices (AR) for EC. This is where you bill for your time and materials, and how you make sure you get paid for your efforts.

Open the Billing file by selecting the **Invoice** Nav button in any open file. Billing relies on information from the following files for proper operation: Client, POC, Setup, & Product, so these files will need to remain open during Billing use. When Billing is selected, one of three following screens appear:

For businesses which both sell material goods (Retailers) and bill by time (Consultants), this browser screen will appear, displaying an overview of the billing details of the record presented.

(image)

The familiar tiers of buttons in the Nav bar and the first record in the Billing file appear. If there are no records in the file, you are directed to the import screen to import information from a previous version of EC or another file. If you do not have records to import, then EC will permit you to return to this screen. We'll review data entry in a moment. For now, let's tour the above window.

For existing invoices, this is a browser window. Only a few fields can be modified or used for search critieria. Immediately below the Nav bar, the billed customer is noted, along with pertinent bill status, customer payment, and payment printing information.

Product and Billable Time information is summarized, along with published notes on this invoice, along with all dollar amounts. Product delivery (date delivered) and job time calculations are also presented.

For Retailers only, this is the browser window available for viewing:

(image)

For Contractors, this is the browser window available for viewing:

(image)

Editing an existing invoice or creating a New invoice.

To view an existing bill in greater detail, or to create a new invoice, select the Edit / New button in the Nav bar. The first of four screens will appear:

(image)

Note the abbreviated Nav bar in the upper left corner. An existing bill will display more detail about the billed client in the four file tab pages available here. The Client name is listed in the top section, along with the type of invoice (Billing, Rental or Quote). The Invoice reference, date and status are giving to the right of the client name.

In the Address tab, your representative (the person who generated the invoice) is listed, along with the Client, POC, and contact information. There are optional fields for recording customer PO numbers, and tax status. Depending on whether you are using the inventory system, the invoice format is displayed, along with summary dollar amounts affecting the invoice. Selecting any of the four file tabs displays that category of information for existing invoices.

If you wish to generate a new record, select the appropriate Nav button (Bill or Quote). Then, press the TAB button on your keyboard to select the Client and POC to whom you wish to address this invoice. Review the contact information for accuracy, and then select the Next button to continue the invoice generation process.

For Retailers, the next screen permits the entry of items from your Products catalog. For Contractors who do not sell material goods, the next screen permits the entry of your billing time, with a text block for the job description summary.

(image)

Using the Inventory system will display this screen above. If this is an existing invoice, and material goods were purchased, those items would be displayed in the window, along with price, quantity sold, total line cost, and stock on hand prior to the sale. Shipping and handling charges are entered manually in the Delivery field. Sales tax is calculated automatically based on the SETUP data.

Add a line item from the Products file by selecting the first available **[+]** button.
If you accidentally add a line item and wish to delete it, you may do so by selecting the [x] button on the far right (not shown here). This requires that you launch EC with your administrative password.

If an invoice does not involve material goods, mark this section as N / A by selecting the button below the product list area. This provides a visual reminder that there were no material goods exchanged on all printed copies.

Non-inventory systems:

If your facility does not use the inventory package, the screen below is presented instead:

(image)

To modify a product line item or add a new item, select the appropriate line, select the pulldown menu of available products, and press enter. Fill in the quantity number and repeat until finished. Enter the Delivery (S&H) charges. [Note: the price column can be modified manually, as needed. This does not affect the price for the product in the PRODUCT file, only on this invoice.]

Return to the client information file tab with the BACK button, or continue with the NEXT button to review or complete the Billing Time and Notes section:

(image)

Review or enter in the number of hours labor or consulting time, travel time (if applicable), or contract time consumed (as a negative number). If travel fees are waived, and this needs to be listed on the invoice, select the Waive travel button. A convenient job timer is included in this page for tracking your billable time. Select the √ to start the timer, the **X** to stop it, and the **t=** to determine the total elapsed time.

To bill for a support contract, select the Add Support Contract button.

Taxable amounts and Sales tax is brought over from the Products page.

Job notes to be listed in the invoice may be entered in the appropriate field.

Select the Back button to return to the Products file tab or the Next button to review all charges in Totals Review (next page).

(image)

Quotes.

Frequently, clients will expect pricing quotes prior to making purchase or labor decisions. You may generate a quick quote in much the same fashion as creating a billing invoice. There are two differences you will notice on the screen: first, the replacement of the Billing Invoice notice with a Quote Invoice notice. The second is that all quotes use the non-inventory windows for developing or displaying information.

Once a quote is created, it has it's own unique Invoice number. Should the Quote be accepted by the client, all or part of it may be converted into an invoice for billing and AR. If modifications to an existing quote are needed, there is an Edit Quote button available in the Edit:Products window, and from under the list window Nav bar.

So what happens when one wants to convert a quote to an invoice? EC permits this with the Convert Quotes button. Selecting the button will automatically display the appropriate screens for your EC installation (convert to an Inventory or a Non-Inventory Billing invoice).

Each item in a quote conversion should be carefully considered before applying it to a Bill, along with all of the other Invoice items the user normally addresses (billing time, travel, etc.) The following three figures illustrate the typical screens for a quote conversion.

Quote Converter, Inventory

(image)

Non-inventory Quote conversion.

(image)

Quote Converter, Part 2

(image)

Invoice List

(image)

Selecting the List Quotes button will display all of the available quotes in chronological order as a scrollable list. You may select any record, and view that record in detail by selecting the Invoice button.

Quote Invoice Print Output

Each type of invoice has a tailored layout for printing. To print an invoice, select the Print button on your screen. The appropriate print output will be sent to whatever you have designated in your Chooser as the output destination. Here is the top portion of a quote invoice.

(image)

The Quote invoice printout gives client name and address information, an assigned Quote reference number, date, and product information for up to ten items. The bottom half of the Quote is given below:

(image)

In the bottom half of the Quotes Invoice, any notes you have recorded for the invoice are displayed, along with additional cost information. The Quotes layout will change, according to your company classification: Both will display both the product information in the top half of the page and the time-related billings in the above bottom portion. Retailer will not display time-related billing information. Consultant will not display product information. Instead, the Consultant layout displays an expanded Notes field for extensive job description.

Billing Invoice Print Output

All billing invoices which are generated initially, or invoices originally created as a Quote, and converted to a Bill, will display very similar print output. Please see the following examples.

The example below is from a company running as Both a Consultant and Retailer. Hence, the top half of the printed invoice details the customer information, along with line item information including the item Code, Description, Quantity Shipped, Cost per Item, and Line Item Total. The total cost of Items listed is subtotaled below the line item section.

Also depicted in below the line itemization is all billing and shipping status.

(image)

The bottom half of this invoice is shown on the following page.

(image)

This is the bottom half of the billing invoice for a “Both” classification. Here, we have output for the notes brought over from the generation of the Quote, as well as cost of Delivery (local deliveries may be taxable in your jurisdiction, hence EC has a field to accommodate such needs), the taxable subtotal, the calculated taxes based on the information recorded in this particular clients file, labor billing, consultation billing, travel billing, shipping and handling (non-taxable), a Total for the invoice, and corrections to the Total such as prepaid or credit amounts and past due carried over manually from a previous bill to yield the Amount Due. Consultants that offer support contracts may show aount applied against any current contracts and the amount remaining on the contract.

As with all relevant output, your terms are listed below the dollar amounts and your custom footer is applied to the bottom of the page.

VENDOR, the supplier manager

The VENDOR file tracks all of ECs Supplier information: Name, POC, mailing and shipping addresses, contact numbers, tax numbers, account numbers, and for vendors which supply ISP services, their default Internet service information. The VENDOR file is used by PRODUCTS, PURCHASE, and MESSAGE.

Selecting the VENDOR button from any Nav bar gives the following screen:

Notes

(image)

The familiar Nav bar is presented at the top of the window. The first tier of Nav buttons permits the standard navigation among the principal EC files.

The second tier of Nav buttons permits the creation of a New vendor listing, which gives a blank screen. The Nav arrows select the first, previous, next and last vendor record. The List button will bring up a list format of all records in the current viewed (found) set (see List below). The Find button puts you in the Find mode, where you may search the file for records matching your criteria in any field. The Print button will print the current record as shown. The Help button will present the Help page with basic reminders of how to use the file. The Close button closes the Vendor file (and saves any changes which have been made to the file).

The third tier of buttons permits basic editing and the Find All command.

The upper left portion of the data window displays name, address and contact information for the vendor. For owners of the complete FMP package, FileMaker permits one to set up modem dial commands for autodialing the telephone. A phone button is linked to this command, and will dial the primary vendor number when selected. (See the Miscellaneous Features section for more details) Below that block is a section for recording additional Vendor information pertinent to your business, such as account numbers, tax information, and references to internet addresses.

The upper right block is for the storage of an image (photograph or scanned business card) for the displayed Vendor.

The lower half of the data window gives five file tabs for specific topical information: Notes, Messages, Purchases, Products & Shipping data. Selecting a file tab will present that window.

When adding a new Vendor, a blank screen is presented. By pressing the TAB button on the keyboard, one may move from field to field, filling in the appropriate information. Alternatively, one may click to select any particular field for editing.

Notes

(image)

The Notes file tab is intended for all of those miscellaneous bits one needs to record, but can't quite figure out the appropriate place for them. The Notes field is scrollable, and selecting the field will present the scroll bar to permit reading information that may be off-screen.

Messages

(image)

The Messages file tab links the Vendor file to all related Messages which may be recorded regarding the displayed Vendor. A View button for ready access to the Message record is available, the date the Message was created, and a portion of the Message body is presented. If more than four messages relate to this vendor, a scroll bar permits scrolling to additional messages. Messages are presented in reverse chronological order (newest Message presented first).

Purchases

(image)

The Purchase file tab links the Vendor file to all related Purchases which may be recorded regarding the displayed Vendor. Note: the Purchase tab will display all purchased made regardless of whether you are running EC in Inventory or non-Inventory mode. The proper layout will present itself. A View button for ready access to the related purchase record is available, the PO number, the date the purchase was placed, the date received, the total cost of the order, and a portion of any items purchased is presented. If more than three POs relate to this vendor, a scroll bar permits scrolling to additional orders. Purchases are presented in reverse chronological order (newest Purchase presented first). The total amount spent with a Vendor is displayed at the bottom of the file tab. EC automatically determines which files to present based on whether an inventory system is employed or not.

(image)

If your company began with one system and converted to another, selecting the Purchase file tab will show the alternate PO collection (e.g., your company upgraded from non-inventory to inventory, and has records for both systems in EC. Since you are now using an Inventory system, the default view in this file tab is to show Purchases related to the Inventory system. If you wanted to view earlier purchased (non-inventory system), you would select the lit Purchase tab to view those files). [The Purchase tab will indicate which view is currently displayed with an "I" (Inventory) or a "n" (non-Inventory) in the file tab] The Inventory view will only display inventory purchases. The non-Inventory view will display ALL purchases, but will not show inventory line items for Inventory POs.

Products

(image)

EC displays all product files for which the current VENDOR is selected as the Manufacturer or Publisher. Selecting the View button next to any listed item will present the PRODUCTS record for that item. Items are listed by item name, current price (your price) and manufacturer's part number.

Internet

(image)

ISP suppliers are considered Vendors (as they sell services to you and your clients). Consultants who wish to record ISP information may access the special Internet screen using the Internet button. To facilitate client education, and as a reminder for you, the consultant, the file tab Internet displays fields for storing critical ISP data. This information may be used in the pre-canned Internet data available for Clients from the Clients:Support Info file tab.

(image)

Note: because some font types make it difficult to discern between letters and alphabet characters (numeral one and the lower-case "L" or numeral zero and the letter "O"), all information recorded in the Internet fields use Chicago font.

Shipping

(image)

Shipping information may differ from mailing information for a Vendor. Record alternate shipping addresses in this file tab, along with special shipping notes. This shipping notes field is not the same as the principal Notes file tab.

Telephone List

(image)

Selecting the List button in any Vendor layout presents a list of all records currently viewed (found). One may sort by any underlined category by selecting that category title (e.g., sort all found records by primary phone number by clicking on the title “Phone 1”.

If more records exist in the found set than are viewable on screen, a scroll bar will be presented to permit scrolling to the additional records.

Select the Vendor button to return to the normal Vendor layout.

Special data entry feature: when entering in address information, if you select the Zip Code first, the City and State will automatically fill. This information is stored in the zipcode.fp3 file, which may be directly access from the Message:Navigator window (see Message section).

PRODUCT, the material goods manager

The PRODUCT file stores all material goods listed for purchase, resale, and inventory (if inventory system is employed). Within the PRODUCT file, information for a material's name, an auto-assigned part number, product description, manufacturer (a menu of your VENDORs is presented), manufacturer part number, system and platform assignments, tax code assignments, your inventory or storage location, cost and resale pricing, and extraneous information may be assigned to the appropriate field.

The PRODUCT file auto-opens during the launch of EC. If there are no records present, the file will ask if you wish to import older Product information through the usual import process. Otherwise, existing records will be presented in a screen format safe for viewing by you or your client. This opening layout will only list your selling price, item status (in-stock, etc.), and relevant notes on the product, as shown below:

(image)

The normal Nav bar displays at the top of the screen. The second tier permits the creation of New records (only while in the full browse mode), standard record navigation, listing of all currently-viewed records, finding, printing, etc. The third tier permits standard editing, a link to the LineItems file (for inventory only), and a Find All button.

Note that this is the window safe for client viewing. Only the selling price is available in the window, not private information such as a vendor's part number, contact number, or your purchase cost. To view the complete information on a product, select the PRODUCT Nav button again (the underlined button) to present the following window:

(image)

Here, one can view detailed information on vendor sources, vendor part number, your cost, a reference 10% markup price, your given price, a reference price minus your local tax rate (for price rounding), status (in-stock, discontinued, shipping, back-ordered, etc.), and additional notes one would not want available in the description field.

Unlike the client window, the manufacturer and manufacturers part number are listed here for reference. To hide this information, simply select the PRODUCT Nav button again to toggle back to the client-safe layout. Note that one may use this layout to compare prices from a number of Vendors. Only the top line in this listing is used for purchase, billing and inventory management, so be sure to place your normal source in this line.

There is nothing like owning a copy of a product to know it well. If your organization has information on a product, a demo copy, or owns a copy, that may be noted in the upper right body of the window. Often, knowing when a product was discontinued is useful, so a date field for recording this is also presented.

The Print commands for both windows give specialized output. For the client-safe layout, output will list the part name, (your) price, and the description. If multiple records are listed, one may print out the complete record set. Output from the full description layout will yield what is displayed on the screen.

Lists

Both layouts offer a List command for viewing selected records as a list. Several lists are available, depending on which layout is currently viewed. Selecting the List command in the client-safe layout presents the following window:

(image)

The above client-safe list displays the product item name, date of record entry, price, and quantity in inventory, if employed. Selecting the PRODUCT Nav bar returns the viewer to the client-safe browser.

While in the full browser, selecting the List button presents the following window:

(image)

This is very similar to the client-safe list, but more complete. Both Lists support print commands for their respective output. With inventory users, selecting the Line Items Nav button displays the following Line Items layout:

(image)

Selecting the Inventory button will display all items in the current inventory using the following screen:

(image)

Product item name, inventory count, price and current valuation based on price are displayed. This list is printable. Return to the Product browser with the PRODUCT Nav button.

Entering New Products

Selecting the New Nav button presents the following layout:

(image)

Mostly self-explanatory, this window is similar to the standard product browser window. Simply fill in all appropriate fields, and then select the Done button to return to the product browser. Note: certain fields, such as # in stock, are not modifiable from this layout. If you are entering in a new item to EC, and you have some of these items in stock already, refer to the Line Items section for modifying existing inventory counts.

MESSAGE, the contact manager

The MESSAGE file is used as a contact manager, basic letter editor, and label printer template. Within MESSAGE, one may enter information about telephone conversations regarding clients or vendors, store and view messages to other office staff, write one-page letters to clients or prospects, and create labels suitable for shipping boxes, envelops or floppies.

MESSAGE also has a navigator layout for quick access to all support layouts one does not normally view during the course of using EC. It is this layout that the user first sees after selecting Start in the Setup layout.

When you launch EC, after the Setup file confirms your system settings, you should see the following screen:

(image)

The top nav menus should be familiar by now. Note the Letter button on the second tier. This would take the user directly to the one-page letter template. Selecting any of the special navigator buttons by each file name would open that particular support file. Your Navigator layout may look different (for instance, an additional financial module for EC is under development, incorporating a Tax module and Loan tracker).

Selecting the Message button in the top tier displays the normal Message browsing template (next page).

(image)

This is the normal MESSAGE browsing window. In browse mode, the user may view outstanding messages, but the body of the message, the client and vendor information may not be altered. To edit the Message being viewed, select the Edit button. The layout will look very similar, but the Client, Vendor and Message body may be altered. During a Find in Browse mode, you may only conduct searches in the From and To fields. You may conduct a Find for any criteria in the Edit mode. The Status line indicates whether a message has been read by the recipient (marked Received, with a date/time stamp) or if the message has been resolved (marked Done) as an on-screen reminder.

To create a new message, select the New button (the user is automatically presented with a blank message in the Edit mode, where the stored User name is automatically supplied in the From field). To view your print options, select the Print button. To view all messages after a Find, select the Message List button in the to Nav button tier.

To reply to a message (used for in-house communication), select the Reply button. This will copy the body of the message into a new message, to which you may add or edit. With EC running on a full version of FileMaker™, the user may conduct a spell check by selecting the Spelling button. The Letter button takes the user to the letter template. The Returned Call button marks the message with the current time and date stamps. The Call Timer may be used as a stopwatch. Select the **Start** button to begin timing an event such as a phone call. Select the **Stop** button to mark the end of the event. Select the Duration button to determine the elapsed time. Selecting the MESSAGE PAD label presents all messages not marked Done. To return to the Navigator, select the Navigator button.

Selecting the Message List button in the first tier presents all messages in the found group in an abbreviated list format.

(image)

In the List format, the date and time of the message is presented, along with the message owner (to whom the message was addressed), the client, the vendor and a portion of the message body. Sort buttons are available for sorting by message date and owner. The Find feature is available for all fields. With the proper administrative password, messages may also be deleted. The user may view the entire message by selecting the Message Form button within the appropriate message, or return to the selected message by selecting the Message button in the top tier.

The Letter template.

The Letter template provides an extended message text block for creating a one-page (8.5 x 11 inch) letter with your company letterhead.

(image)

The Date field fills automatically with the creation date for this record. By selecting the Client field, a list of existing clients will be presented. Selecting a client, then clicking on the Client button just to the left of the pulldown menu will autofill the address fields. In an upcoming version of EC, composing letters to Vendors will be added, with the same features. The text block permits the addition of a letter, with an outline boundary denoting the print margins for a standard letter-size printout on most inkjet and laser printers. The five buttons on the right permit the creation of a new message letter, a spell-check for full installs of FileMaker™, the printing of the viewed letter, and returning to the normal list and form layouts.

If your letter extends beyond the one-page size, as denoted by the grey background border, you may select the Add Page button at the bottom of the template to add a second page of text. Be sure to leave yourself room for the closing signature line.

Printing from the Message file.

Select the Print button in the second tier and the following window appears:

(image)

On the left side of the window, the name of the client, vendor, and the body of the message are displayed. The user may select the print the message as a generic printout, create a new letter, view the Floppy label template, or view the Mailing label template by selecting the appropriate button.

Label templates

Floppy Labels / Package Labels (Avery 6490 style)

(image)

The floppy label template permits the printing of individual labels. Whatever is listed in the Message body in the top left of the screen will be printed. This includes text that runs beyond the recommended size of the message (as denoted by the message field size). To use, review the message in the Example window, place the appropriate label page in your printer feed tray, and select the position of the label you wish to use on the sheet.

Note: each printer handles label pages differently. Some older laserprinters will not accept label sheets, or label sheets may damage the fuser assembly. Certain inkjet printers will jam with commercially-available print label stock. We recommend that you review your owner's guide prior to using labels in your printer. Many laserprinters support manual feeds. This is the recommended method of feeding the printer in all cases.

Envelop Labels (Avery 5160 Style)

(image)

The mailing label template also permits the printing of individual labels. Mailing labels are used not only for envelop mailing, but to label inventory and products in many operations. With that in mind, EC permits the transfer of client addresses, vendor address, and two methods of labeling products within this layout. To use: first select the appropriate information for the label from one of the four catagories. Select the category button to transfer the information to the label example. Then, place the appropriate label page in your printer feed tray, and select the position of the label you wish to use on the sheet.

Note: each printer handles label pages differently. Some older laserprinters will not accept label sheets, or label sheets may damage the fuser assembly. Certain inkjet printers will jam with commercially-available print label stock. We recommend that you review your owner’s guide prior to using labels in your printer. Many laserprinters support manual feeds. This is the recommended method of feeding the printer in all cases.

The next section reviews use of the Support Files.

LEARNING LOG, the troubleshooting reference file

The LEARNING LOG is a hidden reference file for storing miscellaneous notes regarding what you discover or need to refer to during your work. This file is the catch-all for those items you just can't quite remember, or may need for a rainy day: tidbits and news reports from email lists or magazines, diagrams, problem resolution techniques, unresolved problems currently haunting a client, and such.

The LEARNING LOG is available from the MESSAGE navigator window. When this button is selected, the following layout appears:

(image)

As standard in EC, the Nav bar is present at the top of the window. The second tier has mostly familiar buttons, with the exception of the Import Pict, which we will address in a moment.

The body of the window displays the date the record was created, the last date it was modified, and the posting order for reference. Also displayed are pulldown menus for assigning a client, vendor or product as a reference to the log record. The Notes field will contain anything you wish to store (this is scrollable). The Image field will give a thumbnail of any image one imports to the log record. To add an image to the file, you would first supply the image to your hard drive, then select the Import Pict button and select the image file in the dialog box which appears. To view an enlargement of the image, select the Image Nav button or the Image label itself.

(image)

Selecting the Image button presents the above layout. The imported image is presented on the left, and the accompanying notes given to the right (this is scrollable).

To return to the Learning Log browser, select the Return Nav button.

Caution, importing a pict will replace any existing image, which is irretrievable. Adopt a sensible policy of making frequent backups of your EC to avoid unnecessary data loss, downtime, or the need to hire a recovery firm.

Timecard, the employee paycheck tracking file

Timecard is under development. Use at your own risk. This file system is offered as a free addition to the current version of EC, as it will be incorporated into future editions.

Timecard is used to generate and track employee paychecks. It has a rudimentary wage calculation format, and will also store comments and accrued mileage in a timecard-type layout.

Timecard uses information from the Employee file.

Employee, the staff information file

Employee is under development. Use at your own risk. This file system is offered as a free addition to the current version of EC, as it will be incorporated into future editions.

Employee is designed to store basic information regarding you and your employees. It's information is used by the Purchase, Billing, Message and Timecard files.

POC, the point of contact file

The POC file stores all of the individual names and support information for employees and points of contact for a client. The POC file is intimately linked to the Clients file, but as a support file for EC, it is not immediately available in the Navigation Bar. What is stored in POC? The client for whom the individual works, their name, address, telephone numbers and other contact references, hardware and software, and internet settings. Why break out POC information for a client? As clients often have more than one employee with whom you interact, tracking individual employees becomes important when developing a broader sense of the client's needs and resources. We, as consultants or vendors to our clients, benefit by differentiating between the individual POCs under one client roof.

Let's view some of the POC layouts.

(image)

The top half of a completed POC file layout looks very much like the Clients layout, with only one notable exception: you may edit all of the information listed here. Do note: anything edited here will be permanently changed in all future Client and Billing records listing this POC. As with other aspects of EC, editing requires nothing more than clicking on the desired field and entering in your desired changes. The only field here you cannot change is the name of the Client associated with the POC.

Note the bottom of the screen. This, two, will seem familiar:

(image)

This is the source of the customer hardware and software information for the Client layouts. While you could only view this information in the Clients file, you may add or alter the information in these repeating fields. Typically, we record as much information as may be useful in the future for tracking a client and conducting remote troubleshooting.

Selecting the MESSAGES tab brings up the next screen:

(image)

Once again, just as in the Clients file, we are able to research any related messages we have recorded for this POC. The record button on the far-left permits us to readily review the individual record listed. The date of the Message, the status, and the first line of the body are all listed for inspection.
(to learn more about Message, review the Message section)

Selecting the NOTES tab shows this:

(image)

These are the notes regarding the individual, as also available from within the Clients file. NOTES is handy for tracking all of those remarks regarding a POC, but may not fit in well with the other categories selectable for a client.

The INTERNET settings for the POC are available from within the last tab (see next page).

(image)

This layout is where you will enter in any and all internet settings for the POC. These settings are necessary for printing out any of the internet support pages available within the Clients SUPPORT file tab.

By clicking on the select button in the window above, a list of all vendors is presented. We list our customer's ISPs within the Vendors file. If the ISP is listed, selecting its name will autofill many of the fields presented. You may alternately retrieve much of this information from the PPP/TCP or internet control panels on your POCs system.

The majority of the email and ISP settings may be stored within the Vendors file, as ISP providers are considered vendors. Please review the Vendors section for additional information about entering in this data.

Special data entry feature: when entering in address information, if you select the Zip Code first, the City and State will automatically fill. This information is stored in the zipcode.fp3 file, which may be directly access from the Message:Navigator window (see Message section).

Taxes

The Taxes module is under development and experimental in version 1. However, you may find using the Taxes module particularly handy in determining your AR and AP for a given period. Currently, the taxes module supports quick calculations for North Carolina and Federal income and sales tax amounts.

To access the Taxes file, select the Taxes button from the Message Navigator window. The following screen is presented:

(image)

Note that you have three choices for the tax period: by the individual year, by the individual calendar quarter in a given year (Jan-Mar, Apr-Jun, Jul-Sep, and Oct-Dec), or by a selected month in a given year. Click on the desired time frame. In this example, we'll show the tax quarter.

AR / AP spreadsheets.

Selecting a tax period will present the following screen:

(image)

In this example, you see the familiar nav bar at the top of the screen. Immediately below the desired tax quarter link we selected is a grey box for selecting the desired tax period. Clicking once in this box will bring up a chronological menu of all of your tax quarters for which there is valid data in either Billing, Purchase or both. If you haven't entered any records for either of these files, the menu will be blank.

EC presents a summary sheet for Billing (AR) on the left and a summary sheet for Purchase (AP) on the right. Each spreadsheet is scrollable to view all records in the time period. Note: these records are listed within a given time period based on the closure date for the record, not the date the record was initially created. Most accounting practices and state tax agencies base their calculations on when you receive the payment (Billing) or make the disbursement (Purchase). So, for accuracy, you will need to mark each Billing Invoice paid when you receive payment

Totals are given for both AR and AP below each spreadsheet respectively. Currently, automatic tax calculations are available only for NC Sales tax and suggested guides to Federal forms. These fields are suggestions and may not be valid for your application or your state. Please use these totals fields properly in accordance with your local, state and federal requirements.

Selecting the period pulldown menu will display all valid periods for which you've entered records. In this example, we've selected a period for the fourth quarter of 1995. Select the period you desire, then click away from the menu.

(image)

When the period is selected, all records from both Billing and Purchase will be populated with information.

(image)

Note that the individual records are protected from entry to protect your data from accidental erasure. Most totals are self-explanatory. The delta (∂)Cash sum in the lower right gives you an "at a glance" profit total.

ZipCodes

ZipCodes is a support file which supplies City and State information when a US zip (postal) code is selected. Currently, the commercial version of EC ships with a database of over 30,000 zip codes across the country. The demo version ships with an empty file.

Postal Zip Codes within the US follow a pattern by geographical region. The first digit of the US Zip Code tells postal workers which region of the country to route a letter or parcel. Each subsequent digit routes to progressively smaller geographical areas. Here is a general map of Zip Code regions:

(image)

ZipCodes supports the following files: POC, Vendors.

The screen for ZipCodes is very simple: in it are displayed three fields: City, State & Zip. One may conduct finds in any of these fields, and make additions or corrections as necessary.

The data within the Zip file is not guaranteed for 100% accuracy. Some source records may be too detailed for your tastes. For instance, we have several dozen communities in the greater Raleigh area, yet most zip codes are "Raleigh, NC" zip codes. Correcting some zip records in your area may be required.

e.g., In the original database, if I were to enter in the zip code for a client living in 27604, I might receive as a city/state "Morticie, NC". This is clearly a Raleigh, NC zip code now, but at one time the "27604" zip was considered the Morticie neighborhood. Sometimes, technology is too accurate for our use and we need to soften its effects. How you decide to edit your zip files is up to you.

(image)

To edit your Zip information, simply select the record you wish to edit and make your changes in the appropriate field. Adding a new Zip record is no more complicated than selecting the New button, and typing in the information (press the TAB button to jump from one field to the next). All other nav buttons behave as you would expect.

Administration. & Passwords.

When you purchased EC, you were assigned an administrative password. The password protects against unwanted information loss, such as accidental deletion of records. Because the information in EC can be deleted one field at a time, it is up to you to train your users to be careful when working within EC. Fortunately, changing or deleting a field is usually easy to correct. The information is at hand or probably easily remembered.

This isn't the case when whole records are deleted. As such we've protected all files from accidental record deletion. It is possible to delete records, but you should exercise this option quite judiciously. EC is designed for information integrity: you will not be able to easily go back and alter record numbers, invoice numbers and alike.

To open EC with your administrative password, you must first Quit from EC. Then, when you are prepared to double-click on the ExpertConsultant icon, first hold down the Option key on your keyboard. While the key is depressed, launch EC.. When you are asked for your password, enter it.

All administrative passwords are given in lowercase and no spaces.

Coming soon: Employees, Timecards, Expenses, Lineitem and general concepts of how to best manage your information.

Recommended reading:

Honest Business, Phillips & Rasberry, 1996; Shambhala Press, Boston, MA.

Rules for Revolutionaries, G. Kawasaki, 1998.

How to Become Successfully Self-Employed, 2nd Edition, Smith, B.R., 1993; Bob Adams Publishers.

The Macintosh Bible, 7th ed.

The current "Starting and Operating a Small Business" series for your state, Oasis Press, PSI Research, Grants Pass, OR.

Growing a Business, Hawken, Paul, 1987, Simon & Schulster.

Trouble-shooting and FAQs (Frequently Asked Questions)

Blank records. You've somehow created blank records and would like to use them. Not a problem – go right ahead! Most files permit you to enter in replacement or new information if you are in an Edit screen. Outside of Edit screens, you will have limited editing capabilities. Some special exceptions:

Clients – if you create a Clients record, but neglect to enter in a company name, you can do so in any normal layout. Use a blank record to add a new company to the database. How does this affect the database? It really doesn't. With the exception of entering in the first POC for that company, you treat this record as you would any other. For the first POC entry, 'though, you would not go to the Edit screen and select New. Instead, fill out the company name in the normal field, go to the Edit screen for that company, select Add for a new POC (even though you do not have an existing POC) and enter in the POC for that company as you would any normal POC entry. When you return to the Clients field, you may then activate the POC as the current contact.

POC – filling in a blank POC is a little trickier. The POC records are linked to their parent Client record using an unadjustable Client name field.

Purchase –

Selected the wrong client or product: if you've selected the wrong client and need to correct this, simply return to the Edit mode (if not already in an Edit screen), select the Address file tab, and press the TAB key to present the Client pulldown menu again. Be careful not to alter an accurate record!!! The TAB button will allow you to toggle through the principal fields for data entry. Alternatively, you may select the errant field with the mouse. Other editable fields can also be selected with the mouse.

This is also true if you enter in the wrong product. Simply reselect the item and make your corrections.

Version History:

v1.2.3 Enhancements to Billing, Client, POC, Setup, Purchase.

v1.2.2. released 10/15/99. Billing list modified to prevent accidental editing, selecting a list line item takes you to that record. Client: restored relationship to Billing broken in 1.2.1. Setup: modified screen sequence for launch.

v1.2.1. released 10/12/99. Enhancements to Clients, LineItems.

v1.2.0 released 10/3/99. Enhancements to every file, addition of Taxes file.

v1.1.1: released 9/23/99. Enhancements to Billing, Setup, Messages.

v1.1.0: released 9/12/99. Added on-line manual. Enhancements to Billing, Clients, LearnLog, Message, POC, Products, Purchase.

v1.0.9: released 8/28/99. Enhancements to Billing, Clients, Products, Setup, Messages, LineItems, Employees, Zipcode, Purchase.

v1.0.8: released 8/15/99. Enhancements to Purchase, Setup, Clients, Billing, Messages, LineItems, Zipcodes, Employees, Expenses, Message, Timecard and Learnlog.

v1.0.7: released 8/1/99. Enhancements to Purchase, Billing, POC ,Vendor , added Zipcode.

v1.0.6. released 7/1/99. Enhancements to Vendors, Clients, Employees, Line Items, Setup.

v1.0.5. released 6/10/99. Enhancements to POC, Setup, Purchase, Clients.

v1.0.4 released 5/20/99. Enhancements to Products, Timecard, Purchase, Expenses, Clients, Billing, Messages.

v1.0.3. released 4/30/99. Enhancements to Timecard, Learnlog, Expense, Employee, Vendor, POC, Purchase, Lineitem, Products and Setup.

v1.0.2 released 3/31/99. Enhancements to Billing, Products, Message, Learning Log and Clients.

v1.0.1 released 3/24/99 Enhancements to Billing.

v1.0.0 Inaugural release 3/23/99.

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Current Pricing:

As of July 1999, the current cost of EC is as follows:

•**Basic** file set without data: $50.00 U.S.
Single-user mode, unlimited record use of non-inventory EC, no data included beyond full help guide in PDF format, current version on CD. Import feature disabled unless client already owns FMP 3.0 or higher. 1 year free technical support via email to current registered users.

•**Enhanced** file set without data: $100.00 U.S.
Single-user mode, unlimited record use of inventory EC, no data included beyond full help guide in PDF format, current version on CD. Import feature disabled unless client already owns FMP 3.0 or higher. 1 year free technical support via email and telephone to current registered users.

•**Network** file set without data: $500.00 U.S.
(Multi-user mode, unlimited record use of non-inventory EC, no data included beyond full help guide in PDF format, current version on CD, includes one copy of FileMaker Pro, current version, shrinkwrapped*. 1 year free technical support via email and telephone to current registered users.

•**Enhanced Network** file set without data: $700.00 U.S.
(Multi-user mode, unlimited record use of inventory EC, no data included beyond full help guide in PDF format, current version on CD, includes one copy of FileMaker Pro, current version, shrinkwrapped*. 1 year free technical support via email and telephone to current registered users.

File sets with full data for Mac-based computer consulting are available for an additional $50.00 U.S. (This provides a wealth of precanned data for major vendors, products data, and a learning log for Macintosh use)

Registration renewal: updates to latest version of EC in a set category for an additional $25.00 U.S. per year (bug fix upgrades are free to current registered users). [Users of EC who have let their registration lapse may renew at the standard renewal price, or upgrade from a Basic set to the same Enhanced set for $50.00 U.S. Users of EC with a current registration may upgrade for $25.00 U.S. within a set classification.

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On-site installation & training is available for additional charges.

Have we mentioned making frequent backups of all of your EC files is a good idea?

Data recovery of corrupted files is available at our current labor rate and does not guarantee full recovery of any file. Contact After Hours Consulting for more details on these support issues.

Pricing and feature set subject to change without advanced notice. Always check with us prior to making a purchase of EC for the latest version and product news.

Glossary.

Terms and definitions used in EC that you should know:

Classification is the designation of what kind of company you run. Your choice in classification determines what screens you will see in particular files. Current classifications available include the Retailer (one who only sells material goods but no services beyond line item-type sales), Consultant (one who sells by the hour, without the exchange of billable material goods), or Both (one who conducts both kinds of business).

Database means the entire collection of your information. All of the data contained in the various files which interrelate. The database consists of a dozen or more separate Files, most of which intercommunicate their data.

Fields are cells within a Layout where you may enter specific information. For instance, within the Clients database, there are Fields for a Client's company name, and for the title of the point-of-contact, their first name, their last name, their street address, a second street address line, their resident city, state, zip and so forth. Each field contains separate information, and it is this categorizing of each field that gives a database its strength.

File means one of the FileMaker Pro documents which holds information on a particular topic. An example is the vendors file, which holds the name of companies you do business with, your principal contact with that company, address information, terms, account information and more.

Layout means one or more different ways of displaying information from a Record on the screen or to an output device like a printer.

Navigation Bar is the strip of buttons across the top of all windows within EC. Sometimes abbreviated the Nav bar, these are single-click buttons which take you to other files in EC (first tier) or perform operations on the file you are viewing (second and third tiers). You may also Quit from EC or close the file you are presently viewing from within the Nav bar.

Record means one collection of information within a file. You may have fifty clients. You would create a separate record for each client, ending up with fifty records in the Clients database.

Relational means that you can borrow or transfer information from one file to another, without having to type in all of your client information more than once.

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We cannot stress this enough: make periodic backups of your database. We recommend backups on a daily basis with a system designed to support redundant copies of the database. If you do not have a backup strategy employed for your files, contact us for options and assistance. Data loss due to the failure by a user to make sufficient backup copies is not covered under our offer to retrieve your data for free. Failure to backup your data voids all warrantees for this service.

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