

Consultancy Program: What the program Does

The information below shows what the program does. You don't have to use all the program all the time, but some parts of it might be useful to you and save you time, once you have learnt how to use it.

< < < - Use Bookmarks

1. Address Book

- a) Hold all your names and addresses (as many addresses as you want for both people and companies, including an address copy facility – useful for husbands & wives)
- b) Three Ways of Selecting Names (First & Last, Last & First or Both – Set In Settings)
- c) Enter Category (see Category lists below)
- d) Select by All Names or by a Particular Category if you want.
- e) There are Five Selection Lists you can name yourself - eg. Season, Body Shape, Colour, Style, Make Up or Height, Weight, Body Mass etc.
- f) View Past Appointments
- g) Enter Birth Date and calculates age – can be hidden
- h) Telephone from the screen – You can do this throughout the program (and Export the Fax No)
- (i) Email from the screen - You can do this throughout the program
- (j) Visit Websites from the Screen - You can do this throughout the program
- (k) Lock Telephone Numbers to avoid deletions in error.
- (l) Connect Related Files to particular Company or Person
- (m) Open Private Notes (In Case of Networking)

- (n) Do multiple labels for the person or company (16 different regular sizes)
- (o) Design and do an envelope to the 1st or 2nd Addressee
- (p) Export the name and address of the 1st or 2nd Addressee to Word or elsewhere (And open Word at the same time)
- (q) Search by address (1st line and Town) or Telephone Number
- (r) Add to any Lists (see below)
- (s) Show what List (s) the person is on
- (t) Automatically tries to enter the correct form of Address (e.g. Mr., Sir, Lord etc.)
- (u) Include a Picture of the Person

2. Easy Data Entry

Allows you to input the majority of the name and address data for both people and companies using a spreadsheet approach on one extended line.

3. Address Search

- a) Search By Town, County or part of Post Code
- b) Shows Name, Home Tel., Switchboard, Mobile & Address – (You can 'phone all numbers throughout the program.)
- c) Allows you to see Full address of Selected Person or Company
- d) Allows You to do an Envelope to Single Addressee or 2nd Company Contact
- e) Allows you to Export Address for Single Addressee or 2nd Company Contact

4. Category Search

Search by Selected Category and show;

- a) Name
- b) Home Telephone Number
- c) Office telephone Number
- d) Direct line

- f) Mobile
- g) Notes
- h) Copy Married and Single Address to another Program
- i) Do an envelope to Married and Single Address
- j) See Address including email Address & Website
- k) Preview and Export/Print Report

5. Appointments

- a) Diary
- b) Shows Birthdays
- c) Allows anyone on the database to make appointments
- d) Allows you to Charge by Time or Period
- e) Allows you to turn off Upper & Lower Case
- f) Appointments show:
 - i) Date
 - ii) Start Time
 - iii) End Time
 - iv) Client
 - v) Appointment
 - vi) Appointment Cost
 - vii) Amount (depending on Calculation Method (see d above))
 - viii) Notes on Appointment
 - ix) Automatically Invoice Appointment Amount – Add to last unprinted Invoice or starts a new one for particular client.
- g) Preview and then Print Appointments, either for a Consultant or all Consultants, between chosen dates
- h) Preview and Print Birthdays
- i) Delete an Appointment if you make a mistake.

6. Product Sales

- a) Shows list of all clients on left

- b) Show in First or Last Name Order
- c) Select as particular Client
- d) Right hand Side allows products to be added to any client and shows: -
 - i) Sale Date
 - ii) Select Product to sell
 - iii) Unit of Sale is shown
 - iv) Price per Unit is shown
 - v) Enter Number Sold
 - vi) Automatically Invoice Client for Product (Add to last unprinted Invoice or starts a new one for particular client) and Update Stock
 - vii) Delete a Sale if you make a mistake and recredits Stock

7. Invoice

- a) Select Name – Address entered automatically
- b) Auto Number and you can add your own reference
- c) Date (can be changed)
- d) Show Inbuilt Header and Footer (or Don't)
- e) Date of Sale, Details, Amount, Select VAT rate if required.
- f) Enter Invoice Detail order and update it
- g) Alter any entry automatically invoiced
- h) Delete Invoice Item
- i) Notes
- j) Sub Total, VAT and Invoice Total
- k) Note when Invoice Paid
- l) Delete Invoice
- m) Envelope for Client
- n) Invoice Details – Enter Footer details
- o) Print & Save Invoice – It can also be emailed.
- p) Save Invoice, but don't print
- q) Show Client Details
- r) Switch to Statement Form
- s) Once Printed Invoices are shown as Printed and Copy on the Printed form. If no VAT then VAT not printed on Invoice.

8. Credit Notes

This is the same as the Invoice, but makes reverse entries

9. List with Dates (Useful for circulars, Press Releases, Circulars, Christmas Cards etc.)

- a) Select List for Dates
- b) Name Of List
- c) Date of List
- d) Notes about List
- e) Change a Name on List
- f) Add Names to List; Select from all Names or By Category or By Selection List(see Address (d).
- g) Show Name, Company (if Applicable), Note about the Entry, Received Date, Sent Date, Copy (mark to copy to another List) and Don't Print. Add & Remove all Dates, Copy Marks and Don't Print fields).
- h) Copy Names from another List to Current List.
- i) Do Labels (16 Sizes)
- j) Do Mail Merge for Letters
- k) Do an Envelope to a Person On the List
- l) Print the List
- m) See Address of person on the List and telephone or email them from the pop up form
- n) Show what other Lists the person is on

10. Email Lists

- a) Select List for Emails
- b) Name of Email List
- c) Date of Email List
- d) Start Time of Email List
- e) Notes
- f) Open List of Emails to Select from, including selecting by Category or by Selection List (see Address (d).

- g) Details of Name, Email Address, Use and Copy (To another List)
- h) Copy Names (from another List)
- i) Copy Names to the Email and open Email if using Outlook etc.
- j) Do a Report of the Email List
- k) Copy to Email (depending on System Used)
- l) See Address of person on the Email List and telephone or email them from the pop up form

11. Things to Do

- a) Select List
- b) List Name
- c) Date
- d) Person's Name If required
- e) Notes
- f) Date of Detail
- g) Another chance to include a person
- h) Details of List – select from past entries or enter new one.
- i) Completed
- j) Date Completed
- k) Add New Item
- l) Delete Item
- m) New List
- n) Cancel List
- o) Print List

12. Export

- a) Address Book
- b) Appointments
- c) Currents Date Lists
- d) Current Email List
- e) Current Invoice or All Invoices
- f) Current Order or all Orders
- g) Current Things To Do
- h) Settings

Export to csv Delimited, HTML, Word, Excel or Note Book and Open, if required, in selected program automatically.

13. Settings

- a) Select operators Name (Use for Invoice Header and Appointments pre Selection)
- b) Pre Dial Number if required
- c) Own Telephone Number
- d) Select Telephone Modem details
- e) Enter Number of Days Warning for Birthdays and Appointments – will show, when program opens
- f) Years to hide age from
- g) Form of Single Title (Mr. Or Esq.)
- h) Enter First Name or Initials for Envelopes and Labels
- i) Method of Selecting Names – First or Last, Last & First or Both.
- j) Email System – Outlook etc. or Other (eg AOL)
- k) Whether to apply Proper Case or not
- l) Back up Source for Data
- m) Back up Destination for Data
- n) Period between back up in days – You will warned to do it, when the program opens.
- o) Whether to show Header and Footer (you can overrule on the Invoice and Order Form)
- p) Top and Bottom Sales Report (number and whether to show as a % or not)
- q) Clear and Set a Password
- r) Open Appointment Form
- s) Open VAT Form
- t) Open Settings Table – You need to Print this before Updating the program

14. Back Up Data

Allow you to back up your Data or any other file on your computer. .(Automatic reminder to do it)

15.Products

- a) Select products by name or code
- b) Select Supplier
- c) Product Code
- d) Product Name
- e) Product Category
- f) Unit of Measure
- g) 2 Fields you can name yourself
- h) Purchase price
- i) Sale price
- j) Total in Stock
- k) Re-order level
- l) Re-order Number
- m) On Order
- n) Notes
- o) Delete Item
- p) Attach Files and Notes (Time & Dated) to Product
- q) Do a Report of The Product
- r) Include/Show picture of product
- s) Show Supplier Details

16. Product Orders

- a) Select Supplier & Address Insert automatically
- b) Today's Date can be amended
- c) Automatic Order No. inserted and you can add your own
- d) Select whether to show Header & Footer
- e) Automatic entry of all low stock items for the selected Supplier
- f) Open form to add Products from
- g) Select product to order
- h) Unit of Measure
- i) Enter or amend Number Ordered
- j) Accept or amend Cost Price
- k) Total Cost of item and Select Vat

- l) Notes
- m) Sub Total, VAT & Total – These are not shown on print out.
- n) Delete Order
- o) Envelope for Supplier
- p) Order Details for Footer
- q) Save and Print – This updates the on order Figure - – It can also be emailed.
- r) Save Order, but do not print.
- s) Show Supplier

17. Receive Orders

- a) Shows Order No. Order Date and Supplier
- b) Shows Product Name
- c) Allows Price to be changed
- d) Use O.K . Button if all is in order
- e) Use Update Button for Part orders
- f) Shows Number On order, Already Delivered and Balance
- g) Allows Standard Delivery Date
- h) Enter Number Received
- i) Surplus undelivered items can be cancelled or reordered from another supplier.

18. Stock Take

- a) The stock take forms take two forms, one form to carry out the stock take, with Estimated Stock & Room to Enter the found Stock. The other Form allows you to reconcile the found stock, show any gains and loses, print out the form and update the Stock.
- b) There are 10 different Stock Reports, one of which might suit your way of doing it!

19. Reports

There are 25 built in Reports:

- a) Appointments of a Client

- b) Appointments between Dates by Client
- c) Appointments between Dates by Date
- d) Top Stock Sales by Client
- e) Bottom Stock Sales by Client
- f) Total Stock by Product with Purchase Price
- g) Total Stock by Product with Sale Price
- h) Total Stock by Product with Purchase and Sale Price
- i) Total Stock by Product No. with Purchase Price
- j) Total Stock by Product No. with Sale Price
- k) Total Stock by Product No. with Purchase and Sale Price
- l) Total Stock Valuation By Supplier
- m) Stock by Category with Purchase & Sale Price
- n) Stock by Category with Purchase Price
- o) Stock by Category with Sale Price
- p) Low Stock
- q) Low Stock by Category
- r) Outstanding Orders
- s) Orders Placed Between Dates
- t) Orders Placed Between Dates with Supplier
- u) Sales between dates
- v) Stock Sales between dates by Client.
- w) Client's Statements
- x) VAT Sales & Purchase Report for period

All reports can be previewed or printed.

20. Archiving

- a) This allows you to Archive Invoices and Payments that have been paid to a Date
- b) This allows you to Archive Orders that have been received, to a Date
- c) You can see and print out archived documents, but you cannot change them.

21. Help

There are tool tips on most of the fields on the program. In addition there is full on line help, either from the button on the screen or by using F1, on any form of the program, which will take you to the appropriate part of the help program.

22. Low Stock Warning

This popup form shows all items that have fallen below their low stock level. The reorder amount for any item can be automatically ordered by the click of a mouse. It will add the reorder amount to the last order for that supplier or open a new order and update the Stock Outstanding.

23. Development

The Program can be developed to your or your Company's requirements.

The cost would be £40 an Hour or by negotiation.