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Terms & Conventions

Standard Terms

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Standard Terms

Standard computer terms are used throughout this manual. The main terms are listed below.

Cursor The short blinking line or full block (such as a menu selection) which you can normally see on your screen during data input.

Field A specific information area on the screen. For example, the Order Form contains fields such as **Date, Phone, Street, City,** and so on.

Default A logical choice that has already been made for you. For example, you may be asked to input a date, and today's date is already in. That is the default. It is designed to be the answer you would give under most circumstances. You need only tap the **[Enter]** key to select the default, but you can always overwrite the default, if you wish.

Read Only Data that is in a Screen Form but you may not change it, only *read* it. This is usually important information that can only be accessed from another file. Or not at all, as is the case with Invoice numbers, and Service Item numbers.

Field Name This is the name of the field and will be printed in a bold, all capital letter style, for example **ADDRESS**.

Icon A graphical button that represents a menu command.

Toolbar A set or group of icons.

Typographic Conventions

Input anything in this thick type style is to be typed in by the operator, for example, **Technician** means you should type in the word - "Technician".

[ ] Anything between square brackets represents a key on your keyboard. For example: **[Enter]** Refers to the keyboard key labeled **Enter**, and **[Y]** means you should tap the key labeled **Y**.

NOTES will be followed by important information about the subject being discussed.

TIP It will be followed by some information you may find useful.

 Information applies to the DOS version only.

ÿ Information applies to the Windows version only.

Installing ProfitMaster

[Standard Installation](#)

[Network Installation](#)

Standard Installation

To install **ProfitMaster** please insert **Disk 1** into you're A: drive and:

Windows 3.1

From the Program Manager click **Run (File menu).** At the prompt Type: **A:Setup** and press **[Enter]**.

Windows 95

Click the Windows **Start** button. Click **Run**. At the prompt type: **A:Setup** and press **[Enter]**.

DOS

At the DOS prompt **(C:\>)** type **A:Setup.** Press **[Enter]**.

Follow the simple on-screen instructions and **ProfitMaster** will be installed.

At the completion of a successful installation, remove the diskette and store it in a safe place.

Network Installation

Novell Networks

When installing on to a Novell network, the target drive letter will probably be **F:**, so therefore select **F:** when prompted for target drive.

Novel workstations should have the following statement in their **CONFIG.SYS** file.

FILES=39 (or More)

As well as the following statement in the **SHELL.CFG** file.

FILE HANDLES = 39 (or More)

Additionally, server parameter settings should allow for enough file handles to be opened concurrently network wide. This figure can be calculated by using the "39 x Number of Workstations" formula.

As different versions of the Novell network apply this setting differently, please refer to your Novell manual or technical support for guidance.

Most networks, employ a program called SHARE.EXE a data sharing manager. Check your CONFIG.SYS and AUTOEXEC.BAT files to see if the SHARE.EXE is referenced. If so, the statement should include the following switches: /F:8192 /L:512

This will instruct the SHARE utility to allocate enough resources to manage most applications.

NOTE The Windows version should be installed from each of the work stations you intend to run ProfitMaster on to the Target Directory. The Target Directory should be the Network

Shared Directory all the installations are going to, i.e. F:\MASTER.

Other Networks

Most networks employ a program called **SHARE.EXE** as a data-sharing manager. Check your **CONFIG.SYS** and **AUTOEXEC.BAT** files to see if the SHARE.EXE is referenced. If so, the statement should include the following switches:

/F:8192 /L:512

Additionally, server parameter settings should allow for enough file handles to be opened concurrently network wide. This figure can be calculated by using the "39 x Number of Workstations" formula.

As different networks apply this setting differently, please refer to their manual or technical support for guidance.

If the above is not *completely* clear, you should obtain assistance from someone who is familiar with computer basics.

Starting ProfitMaster To start **ProfitMaster** in:

Windows 95

Click the **Start Button**. Click **Programs**. Click **PTS Profit Applications**. Click **CM-Profit.**

Windows 3.1(1)

Double click on the **CM-Profit** icon in the PTS Profit! Applications group.

DOS

At the **DOS** prompt **(C:\>)** type **CD\MASTER [Enter]**. Now type: **Master** and press **[Enter]**.

This will present you with the **ProfitMaster Log-In Screen**.

You will be asked to enter a **User Name**, and a **Password**.

It is recommended, you use the predefined **SUPERVISOR** User Name to Log-In as this will give you maximum control and range of input. Initially the **SUPERVISOR** User Name does not require a Password for entry. Thus you will gain entry by pressing **[Enter]** at the Password prompt without entering a Password.

You may also use any of the following options: User Name: **[Enter]** [No User Name]

Password: **[Enter]** (No Password)

User Name: **USER1 [Enter]**

Password: **[Enter]** (No Password)

User Name: **USER2 [Enter]**

Password: **[Enter]** (No Password)

User Name: **USER3 [Enter]**

Password: **[Enter]** (No Password)

Screen Layout ProfitMaster maintains a consistent look to its screens and operations. Information is placed so as to be easy to find and easy to read. Three **Status Lines** have been provided on each of the screens to keep you constantly informed on where you are and what can be done. Please take the time to locate these status lines and familiarize yourself with their content.

[DOS](#)

[Windows](#)

DOS

File/Form Status Line

This line is found along the very top of the screen. It displays current File and Form Status. A File/Form Status

Line might read:

é é é é é

File Form Record # On file Page # Pages This example shows you are currently in the ORDERS files using the Customer Orders form, viewing Record #156 of the 156 available records, on the first of a 2 screen pages.

Menu Indicator Line

This line is found directly below the Status Line. It provides your menu choices and highlights the Current Menu. It normally looks like this:

User Interaction Line

This line is found along the very bottom of the screen. It displays information and directions relating to your current operation. Typically, it might read:

Move the left and right arrow keys will **Move** you from menu to menu. The up and down arrow keys **move** the selection bar *within* the menus. Optionally you may also use your Mouse to perform this operation.

¿**Do** the **[¿]** symbol stands for the **[Enter]** key, and pressing it will **Do** what you have selected. Clicking the left Mouse button will have the same effect.

Esc informs you that pressing the **Esc** key will **Hide** the menu from view, although leaving it active. When you become more familiar with **ProfitMaster**, you will use this feature often as it clears the screen for clearer display. If the menu is hidden, pressing the **[Enter]** key will bring it back into view.

1st Letter Find reminds you that a short cut to selecting options from an open menu is to enter the **1st letter** of that option.

NOTE The numbers 1, 4, 8 & 9 in the user interaction line refer to the Function Keys on your keyboard, which are represented as [F1],[F4],[F8],[F9], etc..

[F1] Activates the on-screen **Help System [F4]** Activates the on-screen **Quick Notes [F8]** Activates the **Automatic Dialer**

[F9] Opens up the **Automatic Calendar**

WINDOWS

The Windows layout contains the same information as the DOS layout but in a graphical setting. There are some minor changes and additions to be discussed below.
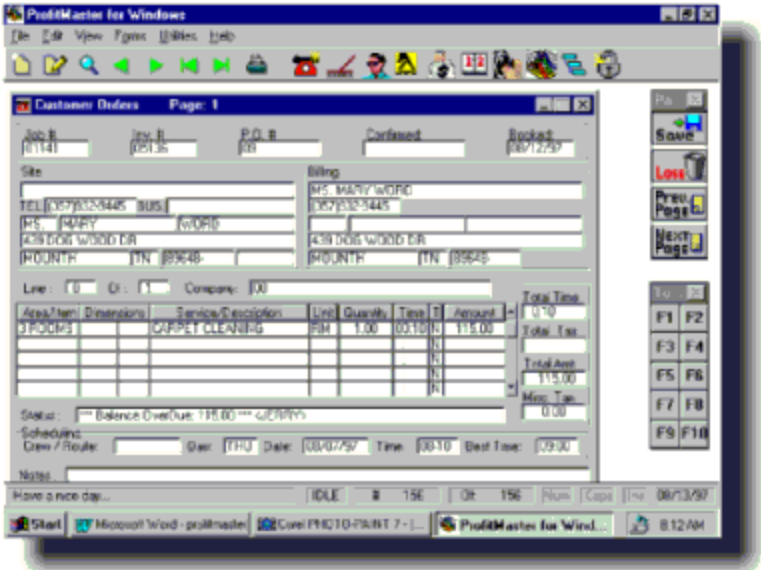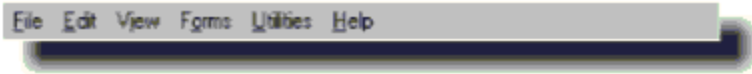
Main Title Bar

This line is found along the very top of the screen. It displays the program name and window control buttons.

Menu Indicator Line

This line is found directly below the Main Title Bar and contains the following menus:

File Edit View Forms Utilities Help

Toolbar

This is found below the Menu Indicator Line and contains the following Icons (from left to right):

New Record adds a new record to the active screen.

Edit Current Record edits the current record.

Search searches for records based on your input.

Previous Record moves to the previous record.

Next Record moves to the next record.

First Record moves to the first record.

Last Record moves to the last record.

Print Reports opens reports to be printed.

Orders, Estimates & Invoices open the Orders screen.

Services & Sales Items open the Services screen.

Personnel (Tech's & Agents) opens the Personnel screen.

Sources of Advertising opens the Sources of Advertising screen.

Customers & Billing Records opens the Customers screen.

Calendars Definitions opens the Calendars Definitions screen.

Cash Register opens the Cash Register.

General Ledger opens the General Ledger.

Chart of Accounts opens the Chart of Accounts.

Security opens the Security screen.

Title bar

This is found along the top of the active screen and contains the name of the screen, for example: **CUSTOMER ORDERS**, and window control buttons.

Status Line

This line is found along the very bottom of the screen and it displays information and directions relating to your current operation. It also displays the record number you are on.

For example: #156 of 156 means that you are viewing record #156 and that there are 156 records for the active screen.

It also indicates whether your keyboard is in the "Cap Locks", "Num Lock" or "Insert" modes.

Finally, the Status line also includes the date.

Vertical Toolbars

There are two vertical toolbars on the right hand side of the screen. The top one is the Page Tools and includes the

following icons from top to bottom:

Save saves the current record.

Lose lose changes to the current record.

Prev. Page moves to the previous page of the current record.

Next Page moves to the next page of the current record.

The lower vertical toolbar is a graphical representation of the function keys found running along the top of most computer keyboards. In **ProfitMaster**: **[F1]** Activates the on-screen **Help System**

[F4] Activates the on-screen **Quick Notes**

[F8] Activates the **Automatic Dialer**

[F9] Opens up the **Automatic Calendar**

Customization

The reason for customizing **ProfitMaster**, is that the program has to understand more about your business before it can serve your special needs. The customization needs to be performed only once, and provides information like: n Names of employees authorized to use the program.

n The different services you are offering & their prices.

n The names of the Technician[s] & Booking Agent[s] working for your company.

n The different methods you utilize to attract business, such as **Yellow Pages**, **Reminder Letters**, etc.

Once entered, the program uses this information to greatly speed up operations, and ensure only those you have authorized have access to your system and once on, will use it the way you designed it.

There are four areas of **ProfitMaster** that need to be customized: n **Preferences**

n **Service and Sales Items**

n **Personnel File**

n **Sources of Advertising File**

TIP You may also wish to customize the Customer and Billing File with your past customers. This will speed up the addition of new orders for past Customers, and enable you to do mailings immediately.

Preferences To customize the Preferences select the **Utilities Menu**.

If you have just started the program, the **Currently Selected Menu** is the *Edit Menu*, (the box with Add New Record, Edit Record, etc.). To select the Utilities Menu, use the right arrow key, or your Mouse.

ÿ From the **File Menu** click **Open**..

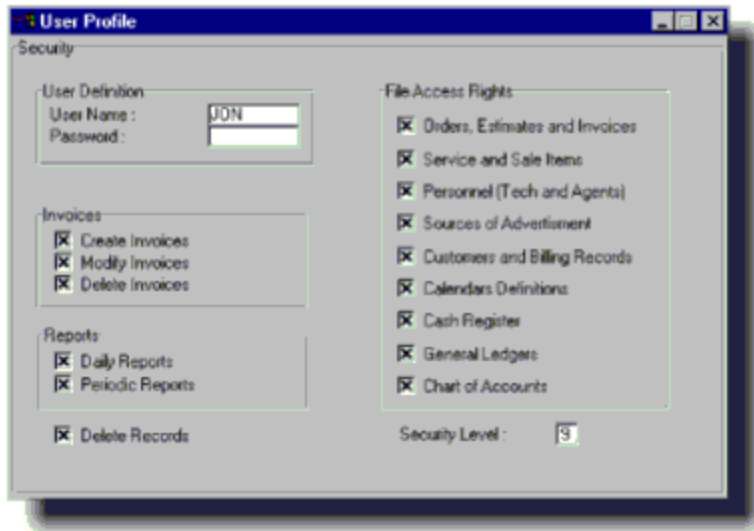In both versions you must sign on as **SUPERVISOR** or the Security option will be dimmed and un-selectable.

Security

Personal

Global

Security

ProfitMaster now allows you to add or edit user records with incredible ease.

Any passwords you set for your users should be considered their initial value because as each of them accesses your system they will be able to change both their name and password through their Personal Preferences. This will never be a problem for you since, as Supervisor, you will always have access to this information.

Add a New Record

To add a new record (User) in your Security file, choose **Add New Record** from the **[Edit Menu](#)**. This will provide a blank security record. You then need to input the User Name, password, if applicable and privileges. Each User has the following privileges: **Create Invoices** allows the user to convert a Work Order to an Invoice.

Modify Invoices allows the user to Modify an Invoice.

Delete Invoices allows the user to Delete an Invoice.

Daily Reports allows the user to print Daily Reports.

Periodic Reports allows the user to print Periodic (Monthly) Reports.

Delete Records allows the user to Delete records.
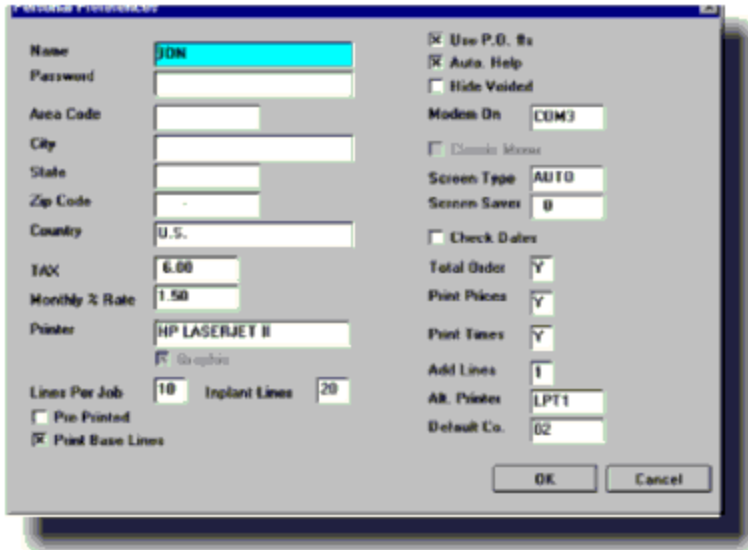
File Access Rights allows the user access to specific files in **ProfitMaster.**

Placing a check mark in the box next to a privilege assigns the privilege to the User. Conversely, removing a check mark from next to a privilege, removes the privilege from the User.

If you would like a User to have full access to **ProfitMaster** you can automatically assign this by placing **99** in the Users Security Level box.

Personal

The following settings are set on a per user basis and affect the settings of that user only. Each of your Users may modify his own preferences through **Utilities ->Preferences->Personal.**

Name Each user may customize their assigned User Name to any 10 characters they choose. Just remember what you enter in this field is what the system will expect the NEXT time you sign on. You will not be let back on unless you enter the exact same characters.

Password Each user may optionally customize their own password to any 10 characters they choose. Just be sure to remember it.

For security reasons the password will not show on the Log-in Screen as it is entered.

Area Code If you wish, you may set up the phone area code, that most of your customers are likely to be calling from. This will save you time later when entering Customer

orders, as **ProfitMaster** will automatically fill in this area code for you. You will also have the ability to modify (overwrite) the default if a Customer has a different area code. If you think this will be useful, go ahead and enter your Area Code. You can always come back here later and change/remove it.

City Same concept as Area Code, but for City information.

State You guessed right, the concept is the same as above.

Zip/Postal Code Uh huh, still the same idea.

TIP While you are most likely to have a high rate of repeat entries for Area Code, City, and State, it is less likely to be true for Zip. So you may prefer to leave this field empty. We have taken care to provide additional time saving capabilities for the relationship that exists between City and ZIP Code. We call it "self-learning" and explain it in greater detail in your Daily Procedures Manual, under Editing Customer Orders.

Country Entering either "U.S.", "CANADA", "AUSTRALIA", "NEW ZEALAND" or "U.K."sets up **ProfitMaster** for the zip or postal code of that specific country.

Tax Rate Here you should enter the Sales Tax Rate for your area so that taxable Services and Sale Items can be calculated. The format of a 6% Tax Rate, for instance, is 6.0. If you are in an area that requires more than 1 Tax Rate, further information is in the section on Services & Sales Items, under Supplementary Tax Setup, for guidance.

SCR. SAVER If no keyboard activity is detected for a certain amount of time, the Screen Saver is automatically activated to prevent damage to your screen. The time frame is expressed in seconds and represents the length of time

your keyboard can remain inactive. A setting of "0" disables this feature. A suggested value is 120. This will give you 120 seconds (2 Minutes) to think between key strokes. When the Screen Saver is active you may always resume operation by simply pressing any key. While in Data Entry mode the screen saver is not active .

Printer The **ProfitMaster** attempts to make the best use of your printer. In order to do this, you need to inform the program which printer is being used. If you are not sure, how to enter this information, you may press the Help key [F1], with your cursor in this field and select from the list of printers available. You should select the one which most closely matches your printer. If you are still not sure about it, please give us a call. We will either help you find out, or have you send us your printer manual. We will then provide you with a printer driver to suit your needs, free of charge.

Graphic Most printers, have **Line Graphic** capabilities, however, they must be setup correctly before you can take advantage of this feature. To test if your printer is set up to print Line Graphics, press the Print Screen key on your keyboard *now* (with some computers you need to press both the Shift and Print Screen keys together). This tells your printer to print a copy of the screen image. If your printed copy does not match the screen image, (there are alphabetical characters printed instead of the boxes), then your printer is either not set correctly, or unable to print Lines Graphics. If this is the case, enter **[N]** in this field and **ProfitMaster** will *automatically* convert Lines Graphics to other graphic-like symbols that your printer **can** print. If the print test looks like the screen, enter **[Y]**.

Lines per Job This is the number of **Service Lines**, you want the **ProfitMaster** to provide you with. This can be any number between 6 and 20. The higher the number, the

more lines you may have in each of your Job Orders, Estimates, and Invoices. The lower the number, the faster the program will perform its duties. So, do not set a higher number of lines than you are really going to use. Regardless of this setting, **ProfitMaster** will only save to disk the actual service lines used for each job for more efficient use of your disk space.

Preprinted Here is where you tell **ProfitMaster** if you are using blank or preprinted paper. Preprinted means that logo, boxes, headings, etc. are already printed on the paper. If you select this option, your system will not attempt to print over the preprinted information. If your preprinted forms also contain a Header/Footer you must erase the Header/Footer provided by us (see section on Header and Footer).

TIP Not only do preprinted forms look much better, but they allow for much faster generation of your forms as ProfitMaster has to print much less on them. For more information on Pre-Printed forms, and how to order them, please call your ProfitMaster sales representative.

P. Base Lines (Print Base Lines) controls whether or not printed Work Orders and Invoices should contain handwriting guidelines for the remaining blank lines.

Modem On If you have ordered the Automatic Dialer with the **ProfitMaster**, you should now enter the Location of the Modem in your computer. The only valid locations are "COM1","COM2","COM3" or "COM4". Please refer to your modem manual, or just give it a try, (you will find out in no more than 4 tries). If you do not have a modem, you may ignore this setting.

Use P.O Set this to **[Y]** if you need to reference Customer Purchase Orders on your Job Orders.

Auto Help Enables the Automatic Lookup Help for Service Items. See Daily Procedures, Service Box section, for further explanation. Initially set this field to **[Y]**. Several of the exercises in these manuals depend on it.

▨▨▨ **Classic Menu** Lets the system know which Menu format you prefer to see. **Classic** is vintage Version 4.5. If you want maximum effectiveness from your **ProfitMaster** V5.0, or later it is recommended you set this field to **[N]**.

▨▨▨ **Screen Type** This field defaults to (**auto**) or you may optionally set it to **Mono** or **Color.**

Printer For Additional Co. If you have not purchased the additional Multi-Company option, this field will not apply to you. This field will default to LPT1. If you want to print reports for your additional companies on a second printer, set this field to LPT2.

Check Dates When **Check Dates** is set to **[N]**, you can enter Date information without any restrictions. On the other hand, when set to **[Y]** there will be a few things the program will **not** allow.

For example:

n You may not enter a Job Date earlier than the Booking Date.

n You may not close a job with a Future Date.

NOTE These restrictions protect you from entering illogical information when running your day to day operations. But when entering historical information, such as last year's

work, for example, this restriction may impose an unnecessary difficulty. In this case, set this field to [N] until you have entered past Customer history, then reset it to [Y].

Total Order You can set whether or not **ProfitMaster** prints the **Total Amounts** on **Orders**. You may choose not to print the totals on Job Orders so your technician may add or change service information and total the Order by hand when the job is completed.

When set to **[Y]**es the total for your services will be printed on your Work Orders.

When set to **[N]**o, the total will not be printed on your Work Orders.

When set to **[A]**sk your **ProfitMaster** will ask you each time you print.

Invoices and Estimates are *always* printed with totals independent of this setting.

Print Prices When set to **[Y]**es the prices you charge for your services will be printed on your Work Orders.

When set to **[N]**o, prices will not be printed on your Work Orders.

When set to **[A]**sk your **ProfitMaster** will ask you each time you print.

Print Times When set to **[Y]**es the amount of time you predict it will take to perform your services will be printed on your Work Orders. **(Yes/No/All)**

When set to **[N]**o, prices will not be printed on your Work Orders.

When set to **[A]**sk your **ProfitMaster** will ask you each time you print.

[DOS] **Add Lines** This will tell your **ProfitMaster** how many lines (if any) to make available on your **Dispatch Report** to allow you to hand write Jobs that come in after the Report has been printed.

Monthly Interest Rate This is the percentage of interest you want charged each **month** for past due customers. For example an entry of 1 would yield 12% per year.

After all settings are as you want, press **[PageDown]** or click **[OK]** to save. You will see the following message:
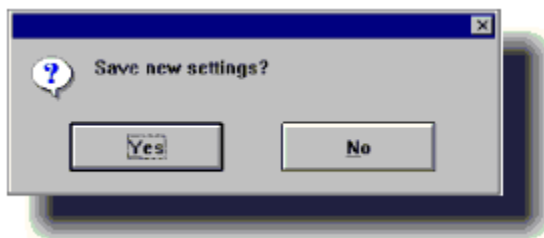
If you have not changed your mind, since entering the information, you should Press **[Y]** or **[Enter]**. If you have changed your mind, use your **Right Arrow[è]** to select N, then Press **[Enter]**, or Press **[N]**, and the settings will remain the same as they were before you entered this screen.

Global

The following settings are global and affect all users. The default global settings are usually sufficient for most users. The Global settings are accessed through **Utilities->Preferences->Global.**
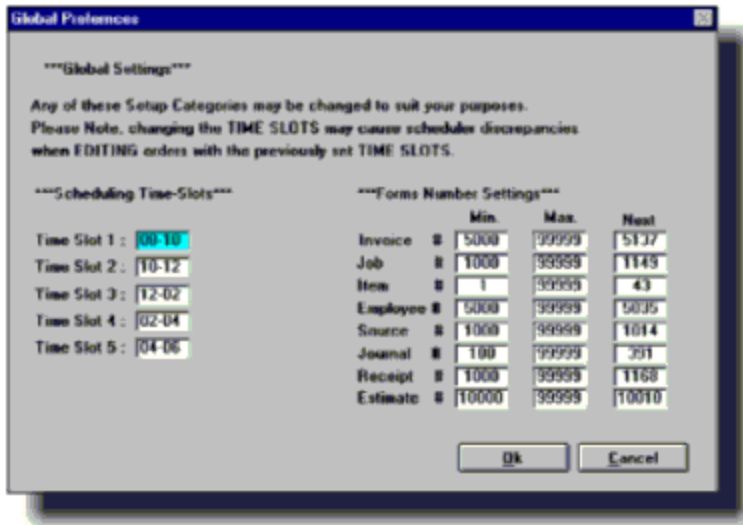
Scheduling Time Slots You can assign the Labels for the 5 time slots that the Automatic Calendar uses. Normally, the Labels represent a segment of your day, such as "08-11" meaning, from 8:00 am to 11:00 am, But you may use anything that suits you, for example, "1st", "2nd", "3rd", etc.

NOTE It is recommended that you do not change these settings if you have jobs already scheduled. If you reschedule *such job, the program will be unable to find the original Label, resulting in an erroneous job count on the Calendar Screen.*

The original settings of the program are:

08:00 - 10:00

10:00 - 12:00

12:00 - 02:00

02:00 - 04:00

04:00 - 06:00

Form Number Settings the **ProfitMaster** automatically assigns Sequential Numbers to all documents produced by the system. For example, Job Order Numbers, Invoice Numbers, as well as, ID Numbers like Employee Number, Item Number, etc.. If you are switching from a system that already assigns such sequential numbers, you may want to tell **ProfitMaster** what your Next number should be. You may define the Minimum, Maximum and Next number for any or all of the following; Invoices, Jobs, Items, Employees, Advertising Sources, Journals, Receipts and Estimates.
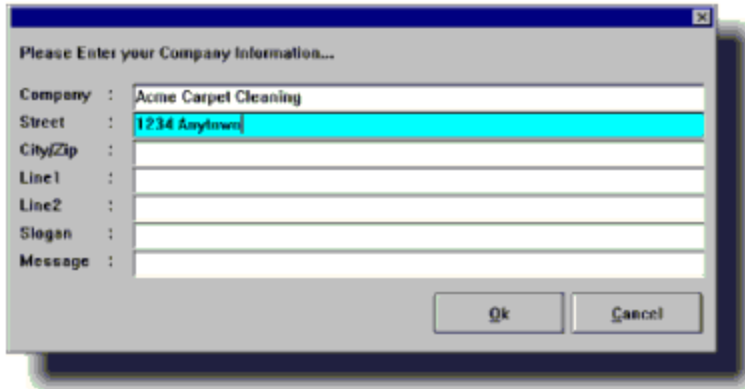
After all the settings are as you want, press **[PageDown]** or press **[Enter]** to save. You will see the following message:
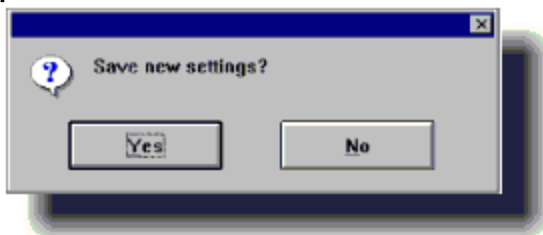
If you have not changed your mind, since entering the information, you should press **[Y]** or **[Enter]**. If you have changed your mind, use your **Right Arrow[è]** to select **[N]**, then Press **[Enter]**, or Press **[N]**, and the settings will remain the same as they were before you entered this screen.

Header & Footer

You have 8 lines of 80 characters each to customize the Header and Footer of your Job Orders, Invoices, etc.

TIP (DOS) While customizing your Header or Footer, most keys will keep their normal Data Entry assignments. In Overstrike mode, the [Enter] key moves the Cursor to the beginning of the following line. The [Enter] key unexpectedly *creates a new line when in Insert mode, pushing all subsequent lines down.*

If you made some accidental changes that you do not wish to keep, simply press **[Esc]** to abort editing, and try again.

◫◫◫ You can save your customized screen by pressing **[Ctrl] [W]**.

TIP (DOS) You may scroll the text window left and right with the [ç], and [è] keys.

Service & Sales Items

The **Service & Sale Items Catalog** contains all the services you make available to your Clients. Both Service Items and Sales Items will be referred to here as "items". This section will show you how to setup the program to "memorize" all the items your business offers.

From the **File Menu** select **open,** then select **Services and Sale Items** option.
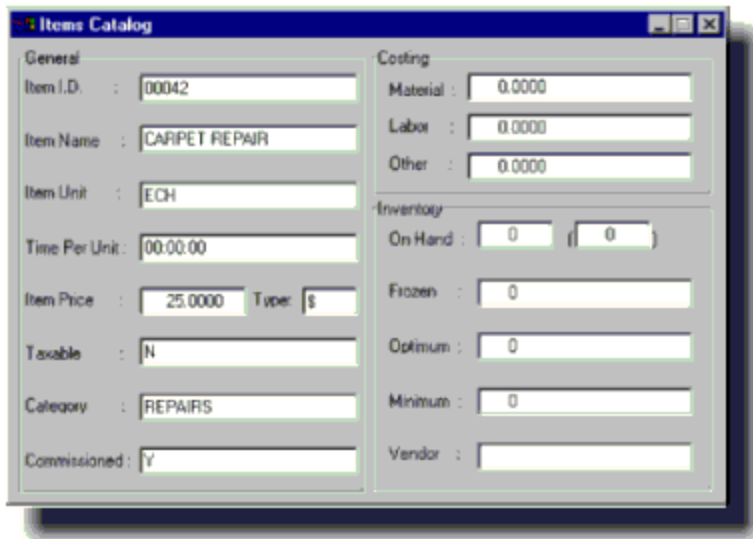
Add New Record

Using your Mouse or the **Left** [ç], and **Right Arrows**[è] move to the **Edit Menu**. From the **Edit Menu** choose **Add New Record.**

ÿYou can click the **Services & Sales Items Icon** instead of the **File ->Open** command.

ÿYou can click the **New Record icon** to add a new record instead of using the **Edit->Add New Record** command.

You will now be presented with a blank Service and Sales Items Form to fill in. Each record in this file contains the following information:

Item ID The Item ID Number is a **read only field** and cannot be modified. **ProfitMaster** will automatically assign a sequential number for the new item after all information for that item is entered. The **"Next"** sequential number is controlled by you via the **GLOBAL** settings under **Preferences**.

Item Name The Service or Item name as you want it to appear in the Service/Description field of your documents.

Item Unit The name of the Unit of Measure used to express quantities of that item. For example, the Unit for Carpet Cleaning may be "Square Feet" or "Rooms", and for Drapery Cleaning it might be "Pleats", or "Panels".

As the Item Unit field is limited to 3 characters, you may need to abbreviate. Use an abbreviation that is meaningful to you. It will appear in the Service/Description field of your documents. Common abbreviations are:

"**SFT**" - Square Foot.

"**LFT**" - Linear Foot.

"**SYD**" - Square Yard.

"**RM**" - Room.

"**EA**" - Each.

"**PLT**" - Pleat.

"**PAN**" - Panel.

Time Per Unit the time it normally takes a technician to perform one unit of the Service. For example, if it takes about 15 minutes to spray 1000 square feet of Scotchgard, you could calculate that it takes 900 (15 x 60) seconds to spray those 1000 square feet. This means it takes 0.9 seconds, or about 1 second per square foot. In this case, the Time per Unit would read "00:00:01", standing for 00 Hours, 00 Minutes, and 01 Second.

Item Price The price of the Item per single unit. For instance how much you charge per SFT (Sq. Ft).

Price Type Enter either **"$"** for Standard Items (indicating this is a price), or **"%"** to indicate the value in item price is to be calculated as a percentage of the job total. This feature comes in handy when calculating discounts or supplemental taxes.

If you offer special discounts to your Customers, you may need to enter a Discount Item on a work order. These are entered in exactly the same way as other items, except that the Item Price will be entered as a minus amount. If the discount is a percentage of the Job Order Total, the price Type would be %. An example would be, if you entered a price of -10.00, and the Type as %, then when you enter this item into a work order or an Invoice, it will automatically be calculated as a 10% discount.

Taxable Mark items subject to Sales Tax with a **[Y]**, those not with a **[N]**. You will be able to modify this setting, on a per Invoice basis.

Category The name of the **Family**, or **Category** of Items, that this item belongs to. You should group your items in a logical and meaningful manner, e.g. Carpet Cleaning, Upholstery Cleaning, Water Damage, Extras, etc. Your reports will then provide you with information pertinent to each category.

Commissioned Enter **[Y]** if this item qualifies for commission calculation and **[N]** if no commission should be paid.

Job Costing is an optional module. If you have not purchased this capability, you may skip this explanation. Job Costing provides the capability to budget your cost of doing

business by estimating how much you spend on material, labor and other (gas, equipment rental, insurance, office rental, etc.). These estimates are as a percentage of the Item Price, and expressed in dollars or fraction of dollars.

Material If you charge $0.15 per square foot for shampooing a carpet and estimate 12% of that goes for material (shampoo), then **Material** would be 12% X $0.15 = 0.018.

Labor If you charge $0.15 per square foot for shampooing a carpet and estimate 40% of that goes for labor, then **LABOR** would be 40% X $0.15= 0.06.

Other The **Other** category is available as a catch all for business expenses other than **Material** and **Labor**. If used, its value is calculated the same as that of **Material** and **Labor**.

Inventory is an optional module. If you have not purchased this capability, you may skip this explanation. Inventory provides the capability to keep track of the materials you are using for the services you provide.

On Hand The quantity of product currently on hand in your inventory. This field cannot be modified through the **Sales and Service** Item file. It is set and modified through the creation of a, Order/Invoice. To add inventory simply create a, Order with a negative quantity.

Frozen the quantity of product currently committed for delivery. This field cannot be modified through the **Sales and Service** Items file. It is automatically calculated from any open Order containing an order for this product. When the Order is closed, the **Frozen** field will be decreased and the **On Hand** field will be decreased to reflect delivery.

Optimum The quantity of product you feel most comfortable having in your inventory.

Minimum the minimum quantity of product you can allow in your inventory before you run the risk of not being able to cover future orders.

Vendor Name of the vendor that supplies this product to you.

After all settings are as you want, press **[PageDown]** or press **[Enter]** to save. You will see the following message:
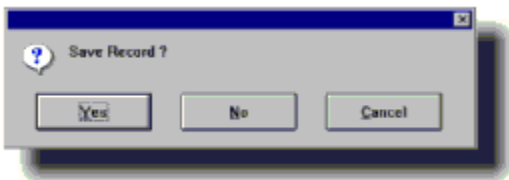
If you have not changed your mind, since entering the information, you should Press **[Y]** or **[Enter]**. If you have changed your mind, use your **Right Arrow[è]** to select N, then Press **[Enter]**, or Press **[N]** and the settings will remain the same as they were before you entered this screen. Selecting **[Cancel]**, will avoid saving this record and keep you within Personal Preferences and allow you to make additional changes prior to saving.

[DOS] After saving the new record, you will be presented with another blank Screen Form. You can now enter another Service and Sales Item or press **[Esc]** to end the data entry session and return to the Edit Menu.

Supplementary Tax Setup

In some parts of the US and other countries, there are *several* taxes that need to be collected from your Customer. If this applies to you, the **Supplementary Taxes** should be entered here as an Item, with a unique, descriptive **Category Name**. Taxes collected using this Item can later be found in the **Sales Analysis Report** under that unique **Category Name**.

The tax is a percentage of the Service and Sales charge, and so must be defined as **"%"** in the **Type field**. You should also enter **[N]** at the **Taxable field**, otherwise you will be adding insult to injury by making the Supplementary Tax taxable!

Sources of Advertising File

This File contains all the different Sources of Advertising that you use to attract Customers so they may be tracked for their effectiveness.

From the **File Menu** select **Open** then select **The Sources of Advertising** option.

ÿYou can click the Sources of Advertising icon instead of using the **File->Open->Sources of Advertising** command.

Add New Record

Using your Mouse or the **Left** [ç], and **Right Arrows**[è] move to the **Edit Menu**. From the **Edit Menu** choose **Add New Record**.

You will now be presented with a blank Source of Advertising Form to fill in. Each record in the File contains the following information:

Id # ProfitMaster automatically assigns this number for every new Source entered. This is a **read only** field and cannot be modified.

Name Source Name or Description. Common Advertising Sources are "YELLOW PAGES", "SERVICE REMINDER", "REPEAT CUSTOMER", "TELEMARKETING", etc..

Vendor The name of the Vendor who sold you this particular Advertising Item.

If you buy several Items from the same vendor, i.e. a ¼ page in a certain Yellow Pages directory and a ½ page in

another Yellow Pages directory, you will need to enter a *separate* Source Record for each item.

Contact Contact person's name, if any.

Phone # Contact's phone number, if appropriate.

Street Street Address

City City

State State

Zip Code Zip code

Cost of this specific Advertising Item.

Overhead % If you know the overhead % of your gross income associated with this item, (e.g. Phone 5% + Commissions 10% + Other 3% = 18%) enter it here. Otherwise leave blank.

Copies How many of a particular Advertising Item there were. For a publication, this figure would be the *distributed* amount. For customized pens or calendars it would be the number you *intend* to distribute.

Activation Date The date this particular Source becomes active, i.e., publication date or distribution date.

Commission % If the Source is a Referral Agency, or a person who receives a commission for business referrals, the figure entered here is used to automatically calculate commissions due, which can be changed at invoice level.

Minimum Commission If an amount is entered here, it will ensure any commission calculated for a job will not fall below this figure.

NOTES Any information needed to further qualify this item.

After all settings are as you want press **[PageDown]** or press **[Enter]** to save. You will see the following message:

If you have not changed your mind, since entering the information, you should press **[Y]** or **[Enter]**. If you have changed our mind, use your **Right Arrow[è]** to select **[N]**, then Press **[Enter]**, or Press **[N]** and the settings will remain the same as they were before you entered this screen. Otherwise choose **[Cancel]** to return to the previous screen in the data entry mode.

After saving the new record, you will be presented with another blank Screen Form. You can now enter another Source of Advertising or press **[Esc]** to end the data entry session and return to the Edit Menu.

Customer & Billing As jobs are added to the **Orders File**, your system will *automatically* add new Customer records to your **Customer File**. However, you may want to enter in a certain amount of Customer Information now. This will enable you to do mailings immediately and speed up new job data entry as you get to them.

From the **File Menu** select **Open** then select **Customer & Billing Records** option.

Add New Record

Using your Mouse or the **Left** [ç], and **Right Arrows**[è] move to the **Edit Menu**. From the **Edit Menu** choose **Add New Record**.

You will now be presented with a blank Customer & Billing Records Form to fill in. Each record in the File contains the

following information:

Id # The Customer Phone #, a unique ID

Work Phone # Includes room for an extension

Company Your Customer's company name, if any

Salut How you address your Customer, Mr., Mrs., Ms., etc..

F. Name Customer's First name

L. Name Customer's Last name

Street Street address

City City.

State State.

Zip Zip code.

Type Whether the above information reflects the Work [S]ite, the [B]illing address, or [2] for both.

Bill # If Type is set to "**Site**", a Billing record must exist and the Billing phone number is needed here.

Bill To A Billing company name will be automatically filled in here, if **Bill #** was entered.

Credit Any accumulated outstanding amount credited to a Customer due to a refund, etc. is shown here, and automatically updated.

Master The Job # which contains the **Master Information** on a Customer, such as *number of rooms* and their *sizes*. This is usually the first order stored for any Customer as this is usually when you collect this information. However, you can update this field if a subsequent Job becomes a more appropriate **Master Order**.

Source The Advertising Source which attracted this Customer.

Agent Which, if any Agent looks after this Customer.

Comments Any useful additional information.

(Nexy) Date The date set for Next Contact

Type The Type of Contact it will be, **[M]**ail, **[C]**all or **[O]**ther.

Notes About that Next Contact.

Mail Whether or not this Customer is to be included on your Mailing List.

Group Which, if any mailing Group this Customer should be part of.

(Last) Call Enter the reason you last called the Customer.

Date The date of that call to the Customer.

The following fields will be automatically filled in by your system.

Mail The name of the mailing, if any is automatically inserted here when the Customer is included in a Mail Merge or Mailing Labels printing.

Date Last mailing date

Job # The number of the last job completed for the Customer.

$ The amount of the last job completed for the Customer.

Date The date of the last job completed for the Customer.

Work The category of the **Primary Service** of the last job you completed for the Customer. The Primary Service is the first Service/Description line entered on the Work Order.

Times How many jobs you have completed for the Customer.

Avg. $ The average dollar amount of past jobs.

Days The number of days between completion of the last two jobs.

Avg. The average number of days between past jobs.

Company ID. If you have a Multi-Company version of **ProfitMaster** you can enter the Company # that services this customer.

After all settings are as you want, press **[PageDown]** or press **[Enter]** to save. You will see the following message:

If you have not changed your mind, since entering the information, you should press **[Y]** or **[Enter]**. If you have changed our mind, use your **Right Arrow[è]** to select **[N]**, then Press **[Enter]**, or Press **[N]** and the settings will remain the same as they were before you entered this screen. Otherwise choose **[Cancel]** to return to the previous screen in the data entry mode.

After saving the new record, you will be presented with another blank Screen Form. You can now enter another Customer Record or press **[Esc]** to end the data entry session and return to the Edit Menu.
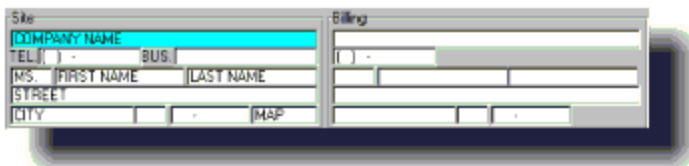
At any point during the entry of your customer data, you may call upon the Quick Notes capability to record comments related to this customer/job. See the **Reference Chapter** for details on how to use this powerful tool.

QuickStart

The following is a very brief description of how to enter a work order into **ProfitMaster** without any previous setup. The Quick Start is an "On-The-Fly" method of inputting records. For more detailed information on the procedures described below please refer to the Set Up and Daily Procedures Chapters.

Once you have "logged in" and the program initializes, you will be on the Customer Order screen. This is the main form you will be using in **ProfitMaster**. From this form you can accomplish almost all of the data entry required.

Now we need to Add A New Record. To do this you can either click the New Record icon (located in the upper left corner of the screen _ the shining yellow folder - Windows only) or you can go to the Edit menu and select Add New Record.

This will place the cursor in the Company Name Field. If this is a commercial job, enter their name here. Otherwise, leave it blank and use the **[Tab]** key to go to the next field.

Note if you clean many sites that are all billed to one company, for instance, a property management company, it is best to give a distinct name or phone number for each site. For example, if you billed to Company "A" for a site located on the West side of town you should bill to "Company A (West)" in the Company Field for all the units at that site. Or, you can bill to "Company A" but give each site

location a distinct phone #. This will make it easier to find, retrieve and enter payments for these jobs.

Phone number is an important field as it is used by **ProfitMaster** to identify your customers. Enter the phone number and the rest of the Site information. This information will automatically be placed in the Customer database. Site information includes:

COMPANY NAME If the Customer is a company, (commercial job) type the Company Name, then **[Enter]**. See above note.

PHONE This is the Phone # field. If you setup your area code in the **Personal Preferences**), you should see the area code already entered, and the cursor positioned past the ")" character. Type the phone number, then **[Enter]**. The Phone Number field is connected to the **Automatic History Lookup System.**

BUS Additional Phone field (with room for an extension No.)

MS. This is the Salutation field where you enter "MR.", "MRS.", "MS.", etc.. Type the appropriate salutation and press **[Enter]**. If you intend on doing Mail Merges make sure this information is inputted correctly.

FIRST NAME Self-explanatory.

LAST NAME Self-explanatory.

STREET Self-explanatory.

ZIP/POSTAL CODE Your input cursor will jump over the City and State fields and be positioned at the ZIP Code. This ZIP code is self-learning and if entered in a previous Order, your

system will remember the relationship between the ZIP and the City and State, and automatically fill them in for you.

CITY Self-explanatory.

STATE/PROVINCE If you entered a state code in **Personal Preferences**, you will see it entered here, or you can type any other state's code, then **[Enter]**.

MAP If you have a local area map system you may enter the page # & map grid here to serve as an aid for your technicians.

BILLING INFORMATION Some customers may want the service to be billed to a location other than the Site. For this reason **ProfitMaster** provides you the ability to enter **Bill To** information. For convenience **ProfitMaster** will automatically copy Site information into the **Bill To** fields. If the Bill To information is different you may use your mouse, or the up arrow [é] key, to move backwards and overwrite the default information.


Next is the Service Description area. The Area/Item field is an optional field for describing the area you are performing work on, i.e. Den, Living Room, etc.

The Dimensions fields are used to calculate the size of the area. If you want **ProfitMaster** to automatically calculate the price of performing work on this area go ahead and input the dimensions. Otherwise, you may leave it blank.
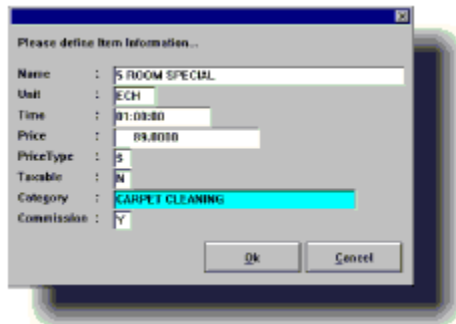
Service/Description is used to input the type of service you are performing. For example: Shampooing. Since we have not set up any Sales or Service Items, you will be prompted with the following screen:
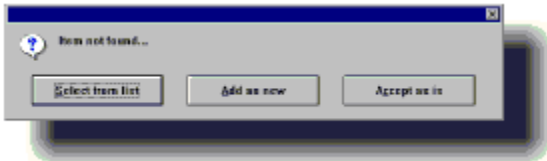
This dialog will always appear in **ProfitMaster** whenever you attempt to use a non-defined item in a field that normally expects a predefined entry.

At this point you can either add the item "as new" to the Sales & Services Database or accept the item "as is" and not place it in the database. If this is a service you regularly perform you should enter it in the database.

Select "Add as New" and a screen will appear asking some general information about the item:

ITEM NAME The Service or Item name as you want it to appear in the Service/Description field of your documents.

ITEM UNIT The name of the Unit of Measure used to express quantities of that item. For example, the Unit for Carpet Cleaning may be "Square Feet" or "Rooms", and for Drapery Cleaning it might be "Pleats", or "Panels".

As the Item Unit field is limited to 3 characters, you may need to abbreviate. Use an abbreviation that is meaningful to you. It will appear in the Service/Description field of your documents. Common abbreviations are:

"SFT" - Square Foot.

"LFT" - Linear Foot.

"SYD" - Square Yard.

"RM" - Room.

"EA" - Each.

"PLT" - Pleat.

"PAN" - Panel.

TIME PER UNIT The time it normally takes a technician to perform one unit of the Service. For example, if it takes about 15 minutes to spray 1000 square feet of Scotchgard, you could calculate that it takes 900 (15 x 60) seconds to spray those 1000 square feet. This means it takes 0.9 seconds, or about 1 second per square foot. In this case, the Time per Unit would read "00:00:01", standing for 00 Hours, 00 Minutes, and 01 Second.

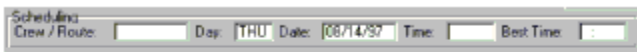**ITEM PRICE** The price of the Item per single unit. For instance how much you charge per SFT (Sq. Ft).

PRICE TYPE Enter either **"$"** for Standard Items (indicating this is a price), or **"%"** to indicate the value in item price is to be calculated as a percentage of the job total. This feature comes in handy when calculating discounts or supplemental taxes.

TAXABLE Mark items subject to Sales Tax with a **[Y]**. You will be able to modify this setting, on a per Invoice basis.

CATEGORY The name of the **Family**, or **Category** of Items, that this item belongs to. You should group your items in a logical and meaningful manner, e.g. Carpet Cleaning, Upholstery Cleaning, Water Damage, Extras, etc. Your reports will then provide you with information pertinent to each category.

COMMISSIONED Enter **[Y]** if this item qualifies for commission calculation and **[N]** if no commission should be paid.

Once you have completed entering this information you will be back on the Customer Order Form. Continue entering your Sales & Service Items. When you are finished, press the **[Tab]** button until you are asked, "Done with Details?" Press "Yes" and you will be put into The Scheduling Section.

Crew/Route is the name you give to your individual trucks or routes. For example you may have a truck that works the West side of your city. Thus you would call the truck, "West". The name only matters in its relevance to you. After you enter the name, a "grid" style calendar will appear allowing you to schedule the job.
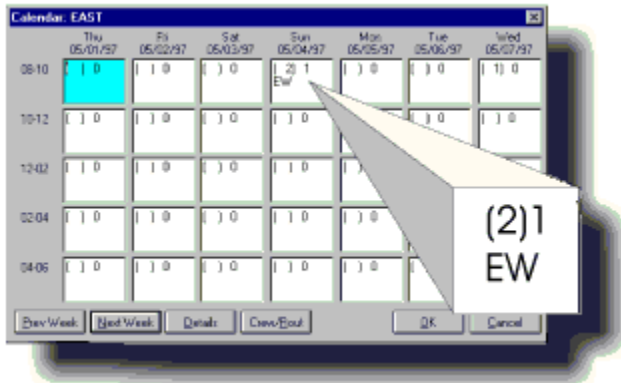
Our example shows the calendar for a Crew/Truck called "W". The calendar symbol for "West" was set to "W" in the Calendar Definitions. The "1" in the top right of the time slot indicates "West" has 1 job in this time slot. The "(2)" is the number of jobs for this time slot for all your Crews/Truck's. If there is more than 1 job for a time slot the number of jobs will be in the parenthesis followed below it by the symbol of each Crew/Truck and the amount of jobs each has for that time slot.

For example, if you have Trucks with the symbols "W" & "E", and "W" is scheduled for 1 job on 5/4/97 between 8-10 and "E" has 2 jobs on the same day and time the calendar for "W" would look like:

(3) 1

W 2E

When you are done scheduling you will be in the Notes field. You can enter any notes pertaining to the job. Press **[Tab]** and you will be on the next page.

If the date of this job is for the current day or before, you will be asked if you want to invoice the job.
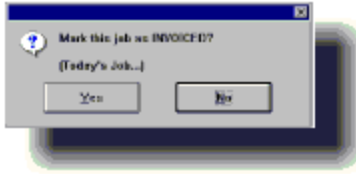
If you have already done the job say "Yes", if not say "No."

Now you will input the Sources of the job.

The Source field is used to track your advertising sources and again, you will be prompted to "Select from List", "Add as New" or "Accept as is". If you choose to add the source to the Sources database you will be asked some more information regarding the source.

NAME Source Name or Description. Common Advertising Sources are "YELLOW PAGES", "SERVICE REMINDER", "REPEAT CUSTOMER","TELEMARKETING", etc.

VENDOR The name of the Vendor who sold you this particular Advertising Item. If you buy several Items from the same vendor, i.e. a ¼ page in a certain Yellow Pages directory and a ½ page in another Yellow Pages directory,

you will need to enter a *separate* Source Record for each item.

CONTACT Contact person's name, if any.

PHONE # Contact's phone number, if appropriate.

STREET Street Address

CITY City

STATE State

ZIP CODE Zip code

COMMISSION % If the Source is a Referral Agency, or a person who receives a commission for business referrals, the figure entered here is used to automatically calculate commissions due, which can be changed at invoice level.

MINIMUM COMMISSION If an amount is entered here, it will ensure any commission calculated for a job will not fall below this figure.
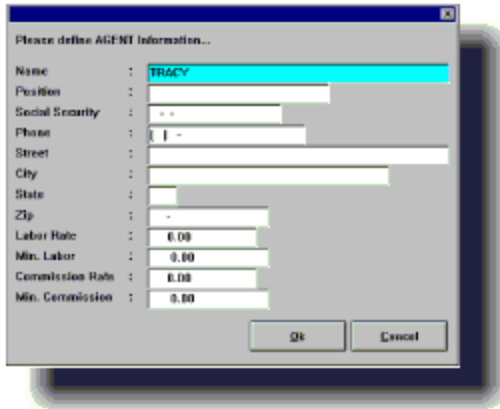
COST Of this specific Advertising Item.

COPIES How many of a particular Advertising Item there were. For a publication, this figure would be the *distributed* amount. For customized pens or calendars it would be the number you *intend* to distribute.

OVERHEAD % If you know the overhead % of your gross income associated with this item, (e.g. Phone 5% + Commissions 40% + Other 10% = 55%) enter it here. Otherwise leave blank.

PUBLISHED ON The date the source will be published.

The next field is for Agent. Use this field to record the name of the person that booked the job. If you use this field you will be prompted to "Select from List", "Add as New" or "Accept as is". If you choose to add the Agent you will be asked some more information regarding the Agent:

NAME Self-explanatory. **POSITION** The position this person holds in your company if applicable.

SOCIAL SECURITY Self-explanatory.

PHONE Self-explanatory.

STREET Self-explanatory.

CITY, STATE, ZIP Self-explanatory.

LABOR RATE The hourly rate you pay this person.

MIN. LABOR If applicable, the minimum amount this person has been promised per job.

COMMISSION RATE The percentage you pay this person per job.

MIN. COMMISSION The minimum amount this person can makes for a job.

Tech is used to enter the Technician(s) that will be performing the job. If you enter a tech you will be prompted to "Select from List", "Add as New" or "Accept as is". If you choose to add the tech you will be asked for some more information.

NAME Self-explanatory.

POSITION The position this person holds in your company if applicable.

SOCIAL SECURITY Self-explanatory.

PHONE Self-explanatory.

STREET Self-explanatory.

CITY, STATE, ZIP Self-explanatory.

LABOR RATE The hourly rate you pay this person.

MIN. LABOR If applicable, the minimum amount this person can makes per job.

COMMISSION RATE The percentage you pay this person per job.

MIN. COMMISSION The minimum this person can makes for a job.

ADD-ON EXTRA % The percent you pay this person *in addition* to his regular commission for any Add-on's or Extra items this person sells.

The Technician Field is optional. If you do not know who is going to perform the work you can leave the Technician field blank and enter the person at the time you invoice the job.

After you enter the Tech, **ProfitMaster** will ask if you want to save the record. If you choose "Yes" you will then be asked to elaborate if you want to save the record as a "Job", "Estimate", "Redo", "Pending" or "Adjustment":
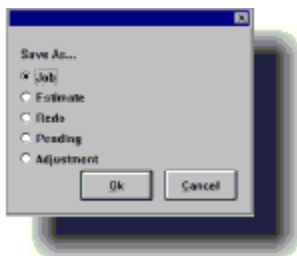
Job Regular work order appointment.

Estimate An Estimate quote and/or appointment.

Redo A correction/redo appointment.

Pending A tentative appointment (requiring further processing)

Adjustment Administrative record, such as an invoice for a returned check.

At this point you are done entering the work order. Repeat these procedures for each job you wish to enter.

If you had received payment and marked the job as invoiced, you can also apply the payment directly on the work order/invoice and close the invoice. If you receive the payment at a later date, you can search for and edit the work order/invoice, applying the payment at that time.

Daily Procedures

[Entering Customer Orders](#)

[Editing a Saved Record](#)

[End of Day Procedures](#)

[Preparing for the Next Day](#)

Entering Customer Orders

Add New Record

From the **File Menu** select **Open**, then select **Orders, Estimates & Invoices**

TIP The Orders, Estimates, & Invoices File is the default file, which means that more often than not it is already selected. If there is ever any doubt the (DOS) Status Line at the top of your screen or (WIN) the Secondary Title Bar clearly displays which file is selected.

Select the **Edit Menu**. Select **Add New Record**.

You will now be presented with a blank Screen Form:

General

The following fields are found in the 1st section of the Customer Order Form:

JOB # The Job Number, when entry is completed, **ProfitMaster**, will *automatically* assign this number for every new order entered. This is a **read only** field and cannot be modified.

TIP If you need ProfitMaster to assign Job Numbers starting at a specific number, this may be accomplished from the Utilities Menu by selecting the Preferences option, then Global settings. You can set the starting and ending numbers of ALL the forms that ProfitMaster generates.

INV # This information is entered automatically when an Invoice is issued for this Job Order. It is a **read only** field and cannot be modified.

P.O. # The Customer Purchase Order, if applicable. This field is used only if the "**Use P.O. #**" is set to **[Y]** in the **Personal Preferences.** If you use pre-numbered invoices use this field.

CONFIRMED This field is optional based on your local procedures. If you contact customers to confirm their job then you may want to use this field.
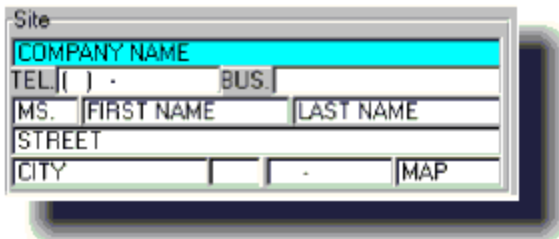
NOTE You may at any later time use the **Confirmations Form** , to enter the confirmation into this field .

BOOKED The date the order was received. **ProfitMaster**, will automatically assign it for every new order entered. This is a **read only field** and cannot be modified. **ProfitMaster** reads the date information stored in your computer clock. If your computer clock is not set correctly, the Booking Date will be incorrect.

TIP At any point during the entry of your customer data, you may call upon the Quick Notes capability to record comments related to this customer/job. To activate Quick Notes press the F4 key.

Site Information

The following fields pertain to the Site where the service is to take place:

COMPANY NAME **If the Customer is a company, (commercial job) type the Company Name, then [Enter]. Otherwise, do not fill in this field.**

The Company Name field is connected to the **Automatic Help Window** and the **Automatic History Lookup System**. The information you enter here will be used to search existing customer records for a match. If one is found, the system will prompt you:

You can now press [H] to copy the customer Header information, or **[W]** to copy the customer's **Master Job** as a whole. The **Master Job** is the Customer's *first* Job unless you modified the customer's record. For more details see Customer & Billing Records.

Phone This is the Phone # field. If you setup your area code in the Personnel Preferences, you should see the area code already entered, and the cursor positioned past the ")" character. Type the phone number, then **[Enter]**. The Phone Number field is connected to the **Automatic Help Window** and the **Automatic History Lookup System.** We highly recommend entering a Phone # for each customer.

NOTE You can use the **[Ctrl][Backspace]** key to erase the default area code if you need to enter a different one.

BUS Additional Phone field (with room for an extension No.)

MS. This is the Salutation field where you enter "MR.", "MRS.", "MS.", etc.. Type the appropriate salutation and press **[Enter]**. If you plan on performing Mail Merges make sure this information is accurate.

FIRST NAME Self-explanatory.

LAST NAME Self-explanatory.

STREET Self-explanatory.

ZIP Your input cursor will jump over the City and State fields and be positioned at the ZIP Code. This ZIP code is self-learning and if entered in a previous Order, your system will remember the relationship between the ZIP, City and State, and automatically fill them in for you.

CITY Self-explanatory.

State If you entered a state code in Personal Preferences, you will see it entered here, or you can type any other state's code, then **[Enter]**.

MAP This field is for your convenience. If you have a local area map system you may enter the page # & map grid here to serve as an aid for your technicians.

Billing Information

Some customers may want the service to be billed to a location other than the Site. For this reason **ProfitMaster** provides you the ability to enter **Bill To** information. For convenience **ProfitMaster** will automatically copy Site information into the **Bill To** fields. If the Bill To information is different you may use your mouse, or the up arrow [é] key, to move backwards and overwrite the default information.

The **Billing** information fields are organized in **exactly** the same way as the **Site** fields, with Automatic Help windows connected to the Bill to Party and Bill Phone # fields.

TIP Automatic History Help is available for both Bill To Party and Bill Phone fields of this group, and is independent of the Site History feature.

If you have many sites being billed to one Company such as a property management company, use a distinct name for that company in reference to each building you service or, you can give each site a distinct phone # in the Site Location Phone # field.

Service Information Box

The next set of fields is referred to as the **Service Information Box**. The box shows 5 service lines at a time, but may contain up to 20 lines. Each field is positioned beneath a descriptive header. The upper left part of the Service Box, displays the current line number, and the number of lines, already entered:

NOTE The first Service/Description line is known as the Primary Service. This line should be reserved for the main, or most important service performed. It is this service that will be referenced when it is impossible or impractical to list all the services on a printed report.

Each line includes the following fields:

AREA/ITEM can be used to define which Area, Room, or Item is to be serviced.

Dimension allows you to enter the dimensions of the Area, or Item to be serviced. **ProfitMaster** then enters the result in the Quantity field. The left half of this field allows numbers as high as 999.9. The right half of this field allows numbers as high as 99.9.

SERVICE/DESCRIPTION is linked to the Service & Sale Items file. Simply type the first few letters of any previously

defined Item ID, or Item Name, and the full item information will be automatically entered for you.

NOTE Should you enter an ambiguous or nonexistent entry, the Help Window will automatically open at the top left of the screen, allowing you to search and select any item from the currently defined Service & Sale Items. You can also activate the Help Window by pressing the [F1] key. More information on using Help Windows may be found in the Using Help Windows section.

UN. This **field** displays the Unit Name as defined for this specific item, as entered in the **Service & Sale Items** file.

QUANTITY This field is automatically calculated based on the Size dimensions, (if entered). You can overwrite the default calculation if you wish and enter any figure you choose.

TIME If the Time per Unit was defined when you entered this Item into the Service & Sale Items File, the estimated service time will be automatically calculated and should now be displayed. You may overwrite this calculation if necessary.

T This is the Taxable Y/N flag. This information is automatically entered from the item definition in the Service & Sale Items File. You may overwrite this information if necessary.

AMOUNT This field is automatically calculated based on the Item Price and Quantity entered. You may overwrite this calculation if necessary.

The **TIME**, **TAX** and **TOTAL JOB AMOUNT** are calculated automatically as you progress through the order entry.

TIP To Add a Service Line press the [Enter] or [ê] keys at the Amount field on the 5th service line, a scroll-up operation takes place, moving the current and all preceding lines 1 line upward. Similarly, pressing the [é] key at the Area field on the 1st screen line, will perform a scroll-down operation revealing the preceding line if any.

When you have entered all necessary service lines, you may press the "**[Ctrl][End]**" key combination to escape out of the Service Box. Alternatively pressing **[Enter]** on an empty line will prompt you:
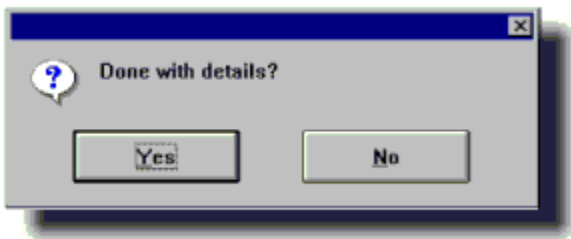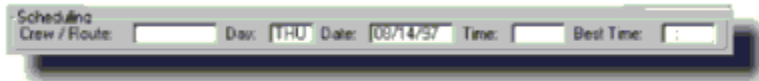

Pressing **[Enter]** now will take you out of the Service Box.

STATUS This is a **read-only field**, which will reflect the **Status** of the Work Order/Invoice.
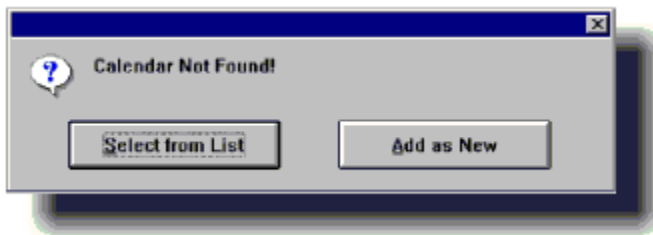
Scheduling

The scheduling information includes **Crew/Route Designation, Day of Week**, **Work Date**, **Time Slot**, and **Best Time**:


Crew/Route Enter the designated Crew or Route code here. If a calendar with this code already exists, the current job will be assigned to that schedule. Otherwise you will be offered the option to [S]elect from a List of already created schedules, or [A]dd as New schedule. The current job will then be assigned to that schedule code. The codes you use may designate a geographical area, a crew name, or whatever suits your purposes.

An unlimited number of calendars may be created and used. If you do not need to utilize multiple calendars, the calendar code may be left empty by pressing **[Enter]** . All scheduling information will then be stored on a single calendar with no name.

After entering the calendar code, or pressing **[Enter]**, the Calendar Window automatically opens, offering you the most intuitive time for the next job to be entered.
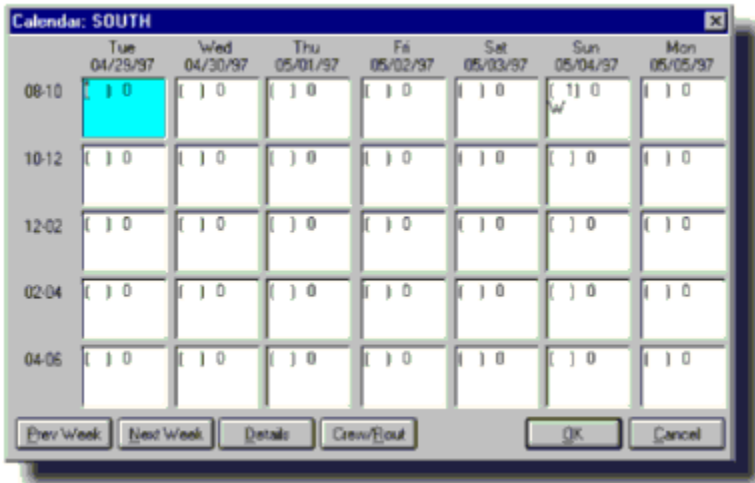
The Calendar Window is formatted in 7 Day columns, and 5 Time Slot rows, all clearly labeled. Each box in the window represents a specific Date and Time and indicates how many jobs are scheduled for that specific time slot. Just press [PgUp] or **[PageDown]** to move a week forward or backwards. If the required date is too far away (past or future), it may be easier to enter the required date directly into the Date field. To do this, press **[Enter]** when the Calendar appears. You will now be in the **Best Time** field. Press [Shift]**[Tab]** once and the cursor will move back to the date field. Enter the desired date. This will force the Calendar Window to reopen with the desired week.
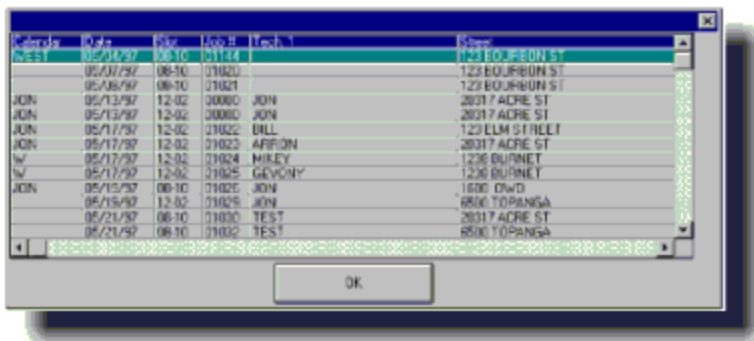
TIP You may call the Calendar from anywhere in the Orders File by pressing [F9]. You can then reschedule the job. Using the arrow keys, move to the new date and press [Enter]. You will be asked to confirm the change with a message "Record New Scheduling ?"

DAY This is the day of the week the job is scheduled. **ProfitMaster** defaults to tomorrow as this is the most likely time for a new job. You may overwrite this, or skip to the Date field to enter the required Job Date.

DATE This is the date the job is scheduled to be performed. As mentioned above, **ProfitMaster** defaults to tomorrow's date, but you may overwrite this default date.

Overwriting the **Day or DATE** fields will automatically activate the Calendar Window putting you at the least used time slot. You may, however, select *any* time or date required by moving the cursor around the Calendar using the arrow keys. When you are at the required slot, press the **[Enter]** key, and the job is scheduled!

If a specific Crew/Route has been entered, only jobs for that specific calendar will be displayed. If you wish to see any other calendar, click the Crew/Route button or (DOS)press the [Tab] key while in the Calendar Window. This will open a Help Window listing all the designated calendars and the date they were created.

TIP Pressing the [F1] Help Key from anywhere in the Calendar Window will open the Schedule Details Window (see above), displaying detailed information on the specific jobs scheduled in that particular slot. Pressing the [Esc] key closes this window returning to the calendar.

When reviewing a calendar that contains multiple jobs scheduled within a time slot the symbols below the job count will help you identify the Calendar designation of these jobs. Additionally, the **ProfitMaster** assigns a unique

symbol for a redo "n", and estimates "**-**". *Pending* jobs are *never* counted on the Calendars.

After you have selected a date and time slot by tapping the **[Enter]** key at the appropriate position on the Calendar, you will be returned to the Input screen. The date and time selected will have been entered in the appropriate fields automatically.

BEST TIME If the Customer has requested an **exact time** for the Technician to do the job, enter it here. This time will appear on the **Dispatch Report** and **Job Order**. Otherwise it can be left empty.

NOTES anything you may wish to add to further qualify the Customer Order. For example:
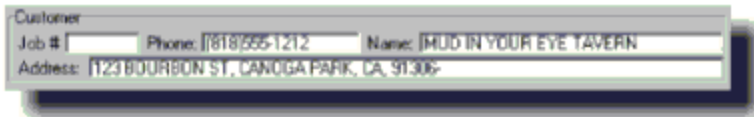
n INTERCOM CODE # 909.

n ** BEWARE OF THE DOG **.

n CALL CUSTOMER AT HIS OFFICE.

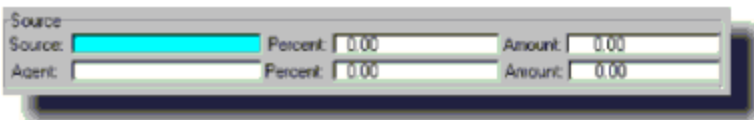Press **[PageDown]** or **[Tab]** to display Page 2 of your Work-Order

Customer Information

This box includes read only information reflecting the customer data as entered on the previous screen:

Customer
Job # [   ] Phone: [(818)555-1212   ] Name: [MUD IN YOUR EYE TAVERN   ]
Address: [123 BOURBON ST, CANOGA PARK, CA, 91306]

Source & Agent

SOURCE This field is used for Advertising Source Tracking. Enter the Name of the Source, if you know it, or Press the Help Key [F1], and information from the Source Table will be listed for you. Move the cursor with the Up and Down Arrow keys to position your selection and hit **[Enter]** when positioned on the records you wish. Alternatively, after pressing the Help Key, enter the first few letters of the Source. The cursor will move to the first selection matching your entry.

Source
Source: [   ] Percent: [0.00] Amount: [0.00]
Agent: [   ] Percent: [0.00] Amount: [0.00]

PERCENT If this source has been defined with a specific commission percentage, this field will display that figure here.

AMOUNT This field will be calculated automatically if the *percent* field is filled in. This field may be overwritten, too.

AGENT This field is also table driven, in this case by the **Personnel File**, so press the [F1] for similar help.

PERCENT If this agent has been defined with a specific commission percentage, this field will display that figure here. You may also overwrite it now.

AMOUNT This field will be calculated automatically if the *percent* field is filled in. You may also overwrite this field.

Technician Assignments

The assignment function is not required for the efficient processing of orders. All technician assignments can be made at the end of the working day when closing out Customer Orders.

NOTE You can assign Technicians at any later time, by using the Technician Assignment Form. For details see *Tech Assignments* in Preparing for the next day.

TIP If you are using this option, you will be able to produce personal listings of jobs for each Technician. For more information, please refer to *End of Day Procedures*, under *Closing Jobs*. Additional information may also be found in the *Dispatching Report* .

Enter the Technician name by doing any of the following:

n Enter all or the first part of the name, then **[Enter]**.

n Press the Help ([F1]) key with the cursor in the field.

This last option will put you in Help mode and present you with a list of all Techs entered in your Personnel file. Select the correct one by moving to that line and pressing **[Enter]**.

TIME This field will automatically contain the total time estimated to do this job, and may be overridden.
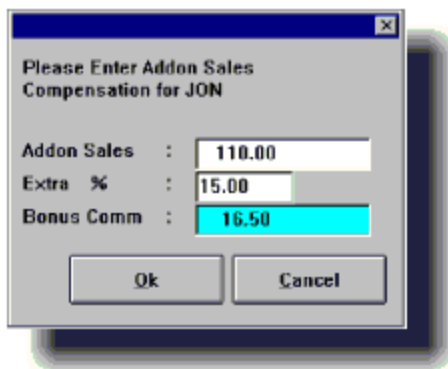
$ If this technician was defined as being paid by the hour, this field will contain his pay for the job, and may be

overridden.

% If this technician is paid a commission the percent commission as defined in the data base will be reflected here, and may be overridden.

$ If this technician was defined as being on commission this field will contain the commission earned on this job, and may be overridden.

If Add-on Sales are entered into a work order and the technician was defined in his Personnel record to receive an Add-on Bonus, the Add-on compensation dialog box will appear:
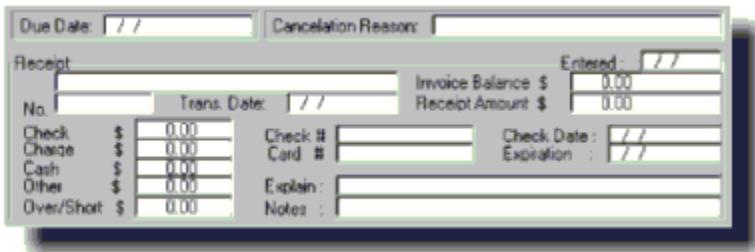
Press the **[Tab]** key until the cursor moves into the **Bonus Comm** field. The amount will be automatically calculated. Confirm the amount and press "OK".

Quick Invoice

As most orders should not be Invoiced yet (Work to be done in the future), **ProfitMaster** will normally skip over **Quick Invoice** and move on to **Saving** the Work-Order. The **ProfitMaster** will default to generate an Invoice *only* when the entered work date is scheduled to a past date (work already done...) Or if the job is scheduled for today. You will be prompted:
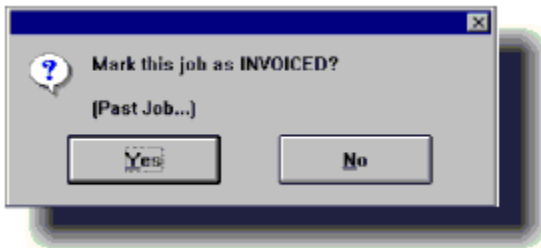
If this job should be invoiced now press **[Y]**, otherwise press **[N]**.

DUE DATE Enter the date payment is due on this invoice.

NOTE Pressing the [+] key and then some number will allow you to calculate a date in the future. For example if the due date should be in 30 days, you can simply press [+][3][0] and press **[Enter]**.

CANCEL RES. This field is required only when the generated invoice is for a $0 amount. You may then enter

the reason for not charging this Job (Redo, Customer didn't want the service, No one home, etc.).

If the job is invoiced, you may now enter the payment information. The payment will automatically be posted against this newly generated Invoice.

TRANS DATE The Transaction Date will automatically default to the Payment Due date, but may be overwritten if you wish.

INVOICE BALANCE This is a **Read Only** field indicating the Invoice Balance.

RECEIPT AMOUNT Enter amount received for this job. If Receipt Amount is less than Invoice Balance your system will alert you and let you know the remainder will be added to this CUSTOMERS BALANCE.

NOTE The Quick Receipt will not allow a Receipt Amount in excess of the Invoice Balance. If this should occur, your system will alert you and request you use the [Cash Register](#) for this transaction. (See the [End of Day Procedures](#) for more details).

Now you may enter how that amount was paid. Either;

n By **Check** along with the **Check #** and **Check Date**.

n By **Credit Card**, with **Card #** and **Expiration Date**.

n By **Cash**.

n By **Other**.

Over/Short If the Amount Received from this customer is not equal to the amount you have entered as Check, Credit

Card, Cash, or Other, the Overage or Shortage will be reflected here.

EXPLAIN This field is used to provide an explanation if a payment is over or short.

NOTES This field can be used for any relevant comments.

Saving The Order

After all settings are as you want, Press **[PageDown]** or **[Enter]** to save. You will see the following message:

If you have not changed your mind, since entering the information, you should press **[Y]** or **[Enter]**. If you have changed your mind, pressing **[N]** will ignore the data you entered. Otherwise choose **[Cancel]** to return to editing the Order/Invoice.

When you press Yes you will be prompted:
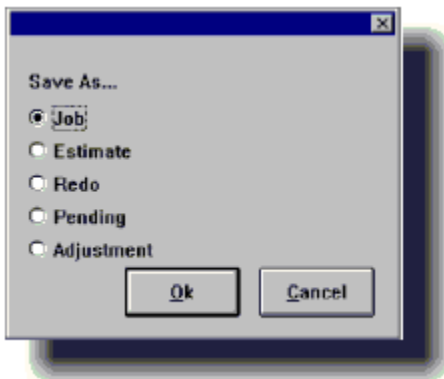
Please choose between:

Job Regular work order appointment.

Estimate An Estimate quote and/or appointment.

Redo A correction/redo appointment.

Pending A tentative appointment (requiring further processing)

Adjustment Administrative record, such as an invoice for a returned check.

If your system has the **Multi-Company** extension you'll be prompted:
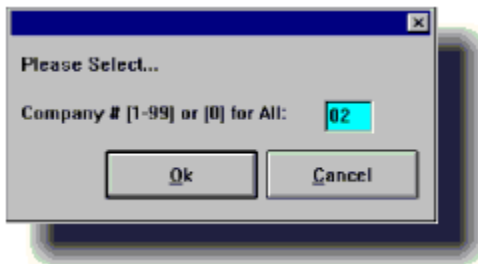
Simply enter the **Company Id #** associated with this order.

After saving the new record, you will be presented with another blank Screen Form. You can now enter another Customer Order or press **[Esc]** to end the data entry session and return to the Edit Menu.

Editing a Saved Record There will be many times when you will need to make changes to a Work Order or Invoice. This will create a new copy of the "revised" Invoice and mark the original Invoice "VOID". *The new copy will have a New Invoice #, but the same Job #.*

NOTE The Edit the Current Record command can be used for editing all records in ProfitMaster, not just Invoices or Work Orders.

1. From the **Files Menu** select **Open** then select the **Orders, Estimates & Invoices.**

2. In the View Menu, select **Search and Display**.

3. Enter your search criteria and press **[Enter]**.

4. In the Edit Menu, select **Edit the Current Record**.

If the job is already invoiced you will be prompted:
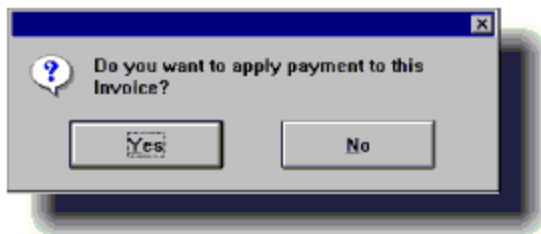
If you need to apply a payment to the Invoice go to ENTERING CUSTOMER PAYMENTS.

Click "NO". If it is an Invoice that has already been paid you will receive the following prompt:
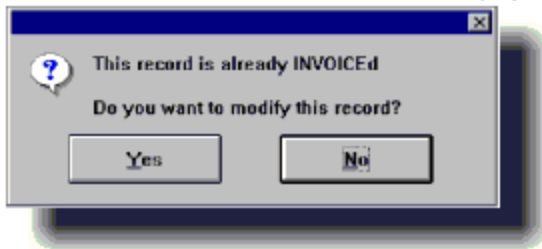
If you choose "Yes" you will receive the following prompt:
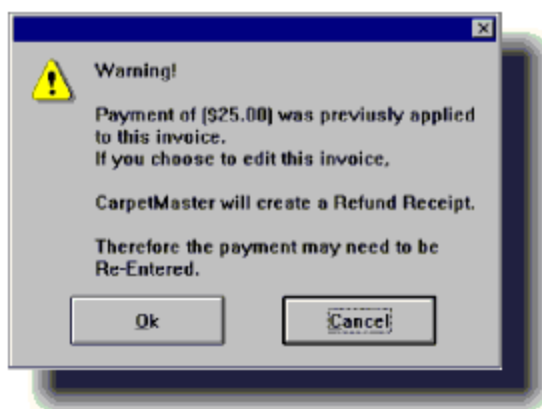
Once you have chosen "Yes" and "O.K." the cursor will move into the **Company Name** field in the Site section of the Invoice.

If the record is a Work Order, you will not receive any prompts.

5. Make any necessary changes to the Invoice or Work Order.

After all settings are as you want, Press **[PageDown]** or **[Enter]** to save. You will see the following message: If you have not changed your mind, since entering the information, you should press **[Y]** or **[Enter]**. If you have changed your mind, pressing **[N]** will ignore the data you entered. Otherwise choose **[Cancel]** to return to editing the Order/Invoice.

When you Press Yes you will be prompted:

Please choose between:

Job Regular work order appointment.

Estimate An Estimate quote and/or appointment.

Redo A correction/redo appointment.

Pending A tentative appointment (requiring further processing) **Adjustment** Administrative record, such as an invoice for a returned check.

You have now completed editing the record.

If the Record was a paid Invoice remember to re-enter any applied payments.

End of Day Procedures Without any effort on your part, other than performing your regular Daily Procedures you will now be able to access all the information stored throughout the day. Use it to check your operation, and set up for the next working day.

In this chapter we will show you how to:

n **Print the Booking Report**

n **Close Jobs**

n **Close a Job as a Cancellation**

n **Void an Invoice**

n **Reinstate a Voided Invoice**

n **Process Outstanding Jobs**

n **Enter Customer Payment Information**

n **Void a Payment**

n **Audit the Cash Register**

n **Audit End of Day Information**

n **Perform the DAILY BACKUP PROCEDURE**

Printing the Booking List From the File Menu select Open, then select the Orders, Estimates & Invoices file.

From the File Menu select Print then select the Booking List report.

If your system has the Multi-Company extension you'll be
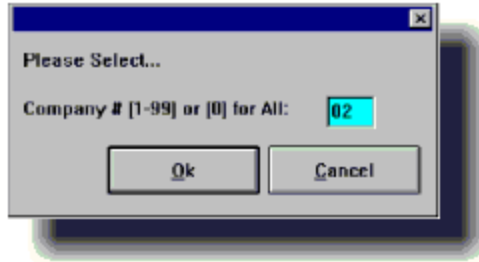
prompted:

Simply enter the **Company Id #** for records to include or 00 to include **All Companies**.

NOTE When running reports using the Multi-Company version of ProfitMaster you will always be prompted to select a company. In the following reports we have omitted that screen prompt from our instructions

.
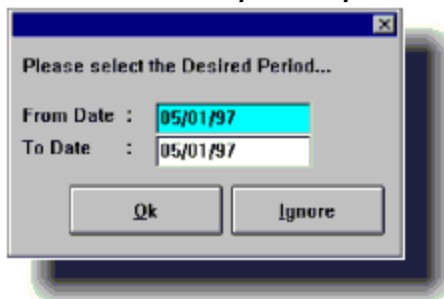
You may then select the required period or press **[Enter]** *twice* for today's **Booking List**.

Closing Jobs

There are 2 ways to close a job.

The first procedure is to retrieve and edit the work order. If the date of the work order falls on or before the day you edit
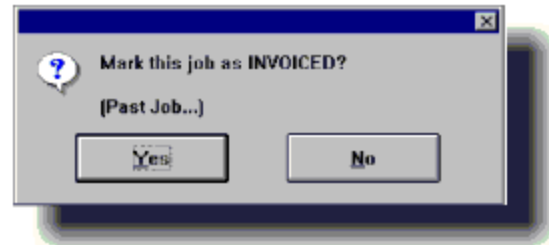
it **ProfitMaster** will prompt you:

Choose "Yes" and save the record as outlined in Part 2.

TIP While editing an Invoice you can also enter payment for the work directly into the Invoice.

The second procedure may be preferred for closing large quantities of invoices as it skips the site and billing fields and also will not ask whether you want to mark the job as an Invoice as it is implicit. If you are closing a work order and need to edit the site or billing fields, do not use this method. Otherwise: **1.** From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

2. Move to the Forms Menu selection and select the **Close Jobs / Invoices** option.

3. Move to the View Menu selection and select the **Search and Display** option.

4. Enter the **Job #** of the Job you want to assign and press **[Enter]**.

5. Move to the Edit Menu and select the **Edit the Current Record** option. The cursor will be placed in the first field of

the **Service Box**.

6. Any changes or additions can now be made to the Invoice. If you do not need to make any changes to the Service area, [PgDn] will take you to the next screen.

7. Skip over to the Tech fields.

8. Please enter the Tech. Name. This is a **highly recommended field**, as it is used to measure **Tech Performance**. If a cancellation was received before a tech was assigned you may wish to enter "NONE".

NOTE The Tech field is table driven by the Personnel File and may be accessed by pressing [F1], the Help Key. Information from the Personnel File will be listed for you.

You can either:

n Move the cursor with the Up and Down Arrow keys to position the selection bar and hit **[Enter]** on the record you wish.

n Enter the first few letters of the Technician. The cursor will move to the first selection matching your entry. Press **[Enter]** to select.

n Use your Mouse to select the Technician you want.

Now you can accept the default calculation, or overwrite the following: **9.** Enter the time taken to do the job

10. $ Wages, if appropriate.

11. Commission %

12. Verify or change the automatically calculated Commission Amount.

NOTE If Add-on Sales are entered into a work order and the technician was defined in his Personnel record to receive an Add-on Bonus, the Add-on compensation dialog box will appear. Verify and approve the technician's bonus.

13. Repeat steps **7 to 12** for a second tech if any.

14. DUE DATE

The date when payment is due. The Work Date is entered as default for convenience, but you may enter any valid date.

TIP If this is a Customer to whom you have extended credit terms, the CalcDate feature will be very useful here. Let's suppose this is a Customer with Net 30 terms. From the Due Date field, enter "+30". This will calculate and enter a date 30 days in the future.

You may now enter the payment information if a payment was received.

15. Repeat **steps 3 to 14** for each of the remaining Jobs to be closed.

Closing a Job as a Cancellation Once you have selected and displayed the job you want closed you may choose to close it as a **cancellation**. After performing steps 1-6 in the previous section, move the cursor into any area of the Service Box and press **(DOS[Alt][X]) (WIN[Ctrl][Alt][X]).** This will zero out the Invoice Total and mark the job as "Cancelled". Then continue entering the Tech information and the Cancellation reason. When you are finished the Status Line will say "Exception" and give the reason & technician assigned to the job:

Status : Exception-OUT OF TOWN <JON>
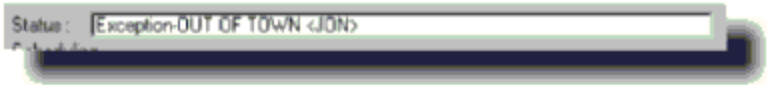
TIP You may still assign Technician Compensation even for a cancelled job. Simply enter the appropriate amount, and then confirm this when saving the record.

Voiding an Invoice 1. From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

2. From the **View Menu** select the **Search and Display** option.

3. Enter the **Job #** of the **Invoice** you want to void and press **[Enter]**.

5. From the **Edit Menu** select the **Delete/Void this Invoice** option.

6. Press **[Y]**es and you will then be prompted:
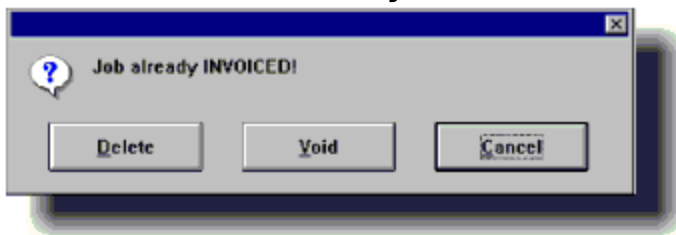
7. Press [V] to void this Invoice.

If *that* was a mistake, see **Reinstating An Invoice**.

NOTE When voiding an Invoice, any payment previously applied against this Invoice will be voided by the addition of a negative entry for this amount in the Cash Register file. You should reenter and apply this amount to another open Invoice, or refund the money.

Reinstating an Invoice

1. From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

2. From the **View Menu** select the **Search and Display** option.

3. Enter the **Job #** of the **Invoice** you want to *reinstate* and press **[Enter]**.

5. From the **Edit Menu** select the **Reinstate Voided Invoice** option.

Pressing **[Y]** here will **Reinstate** the Invoice.

NOTE Amounts previously applied to a voided invoice, will not be automatically reinstated with that Invoice and must be reapplied.

Processing Outstanding Jobs We recommend that you regularly check for any Jobs that should have been invoiced but were not, and correct the situation.

1. From the **File Menu** select **Open** then select **Orders, Estimates and Invoices.**

2. From the **File Menu** select **Print**, and select the **Outstanding List**.

Please Select Records to Include...

All   Jobs

Estimates   Pendings

Select the type of records you want to include in the report.

Please select the Desired Period...

From Date : 08/12/97
To Date   : 08/12/97

Ok   Ignore
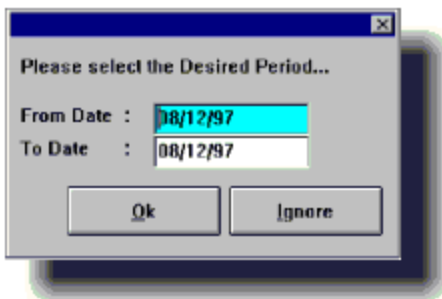
You may then select the required period or press **[Enter]** *twice* for **Yesterday's Outstanding Jobs List.**

If there are no **Outstanding Jobs** you will see the following

No Matching Record Found...

OK

message:

Indicating you are on top of things and all Job Orders have been dealt with properly. However, if **ProfitMaster** finds outstanding orders you will be given a report.

Review the list and perform one of the following:

n Close orders that were left open by mistake.

n Cancel orders that were canceled by the Customer and will not be completed.

n Reschedule jobs that will be completed at a later date.

n Assign orders to the **Pending Jobs Report** by saving the job as **Pending**. To do this, simply reschedule the job to the desired date and time for the future call, and mark the record as [P]ending when saving the record.

Entering Customer Payments There are two ways to enter Customer Payments.

1. From the **Files Menu** select **Open** then select the **Orders, Estimates & Invoices.**

2. In the View Menu, select **Search and Display**.

3. Enter your search criteria and press **[Enter]**.

4. In the Edit Menu, select **Edit the Current Record.**

If the job is already invoiced you will be prompted:
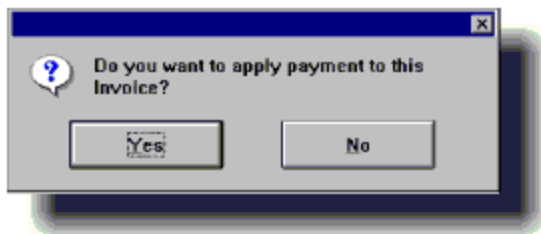
If you do not need to make any changes to the Invoice click "Yes". If you do need to make changes, click "No", and begin editing the invoice.

On the second page you will be able to enter the payment directly into the Receipt area of the Invoice. This will create a new copy of the "revised" Invoice and mark the original "VOID". *The new copy will have a New Invoice #, but the same Job #.*

If you selected "Yes" a Quick Receipt screen will appear:

Enter the payment information and click "OK".

The other **way** to enter a customer payment is through the Cash Register.

1. From the **Files Menu** select **Open** then select the **Cash Register**.
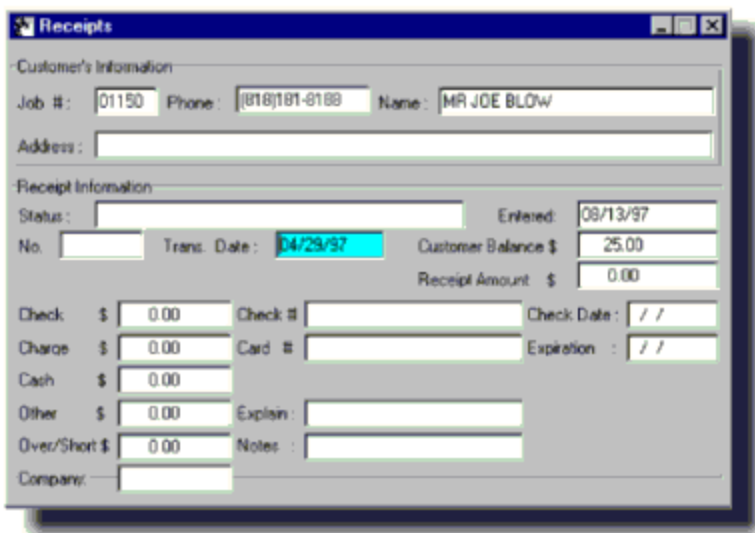
2. Select the **Edit Menu** then select **Add New Record** to enter the new payment, then enter one of the following two pieces of information.

3. JOB NO. Enter any Job # for the customer the payment is from **NOTE** Be aware the **Job #** is used to reference the Customer. Therefore all of this customer's records will be searched and will yield *all* **Open Invoices** for this customer.

4. CUSTOMER ID

Enter the phone number of the "Bill To:" party. If you don't know it, press [F1] and a window will open with the **Customers Billing List**.

NOTE Information identifying the Customer and his outstanding balance will appear on the screen.

5. TRANS DATE The Transaction Date, will automatically default to the Payment Due date, but may be overwritten, if you wish.

6. CUSTOMER BALANCE The Customer Balance, reflects the balance this customer has with you for ALL open Invoices.

7. RECEIPT AMOUNT Enter amount received for this job. If Receipt Amount is less than Invoice Balance the remainder will be added to this CUSTOMERS BALANCE.

8. Now you may enter how that amount was paid. Either;

n By Check **along with the** Check # &Date**.**

n By Credit Card**, with** Card # **and** Expiration Date**.**

n By Cash**.**

n By Other**.**

9. Over/Short If the Amount Received from this customer is not equal to the amount you have entered as Check, Credit Card, Cash, or Other, the Overage or Shortage will be reflected here.

10. NOTES This field can be used for any relevant comments.

11. After all settings are as you want, Press **[PageDown]** or **[Enter]**.
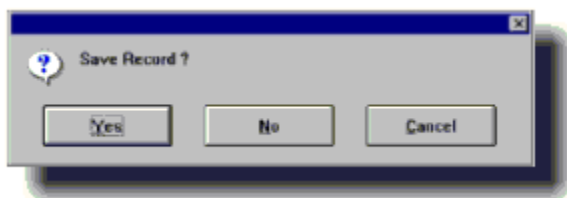
12. Press **[Y]** to save the Receipt.

13. You must now apply the payment. Under normal circumstances, the total amount will probably be applied to a single invoice, but **ProfitMaster** allows you to apply the **Amount Received** to as many invoices as you wish.

```
Please Apply Payment...

Customer ID #      :   (818)555-1212
Customer Name      :   MUD IN YOUR EYE TAVERN
Open Balance       :      1,720.00
Balance Due        :      1,720.00
Applying to        :   1
        of         :   9
Job #              :   01149
Job Date           :   04/29/97
Job Adress         :   123 BOURBON ST
Invoice #          :   05138
Due Date           :   04/29/97      PAST DUE!
Open Balance       :       55.00
Available  $       :       55.00
Apply      $       :       55.00

                            Ok        Search
```

If multiple Invoices are open for this Customer, they will now be presented in order of Due Date. If you do not wish to apply any amount to a specific Invoice, simply enter 0, and you will be presented with the next open Invoice.

TIP Pressing the [Esc] at this point will offer you the opportunity to enter a Job # or Invoice # of your choice. You may also browse through the offered records by using the [Page Up] key for the previous Invoice, and [Page Down] for the next Invoice.


```
Please Confirm (Non Correctable)!

        Yes              No
```

14. Press **[Y]** to confirm applying the amount to the specified Invoice.

15. When the **Amount Received** has all been applied, you
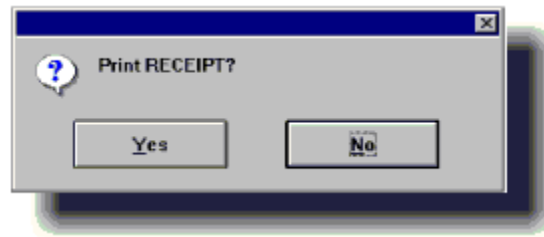
will be asked:

16. Press **[Y]**if you want a hard copy, otherwise press **[N]**.

17. Repeat steps **2 to 16** for any additional payments.

Voiding a Payment Voiding a payment is in fact accomplished by voiding the Invoice(s) to which the payment was applied, and then reinstating those Invoices if they are still valid. For example: Suppose you applied a $100 payment to Invoice # 1122, which was supposed to have been applied to Invoice # 1123. You need to *void* Invoice # 1122, thereby voiding the payment against it. Once the payment is void you must then reinstate invoice #1122 since it is a valid Invoice. Now you can reenter the payment and apply it to Invoice # 1123. Your Register Listing Report would reflect the above scenario like this: CASH REGISTER Report From : 01/01/93 To: 10/21/93 Page: 1

Rec. # Cash Check Charge Total 06/02/93

001008 100.00 0.00 0.00 100.00

001009 -100.00 0.00 0.00 -100.00

001010 100.00 0.00 0.00 100.00

==== ==== === === ====

100.00 0.00 0.00 100.00

Auditing the Cash Register From the **File Menu**, select **Open** then select the **Cash Register** file.

From the **File Menu** select **Print** and select the **Register Listing** report.

TIP this report can also be run from the Orders, Estimates & Invoices screen.
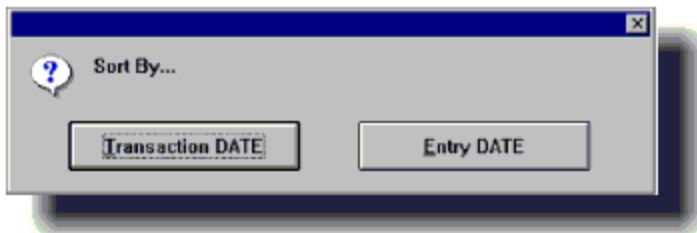
Press [E] for Entry Date and press **[Enter]**.
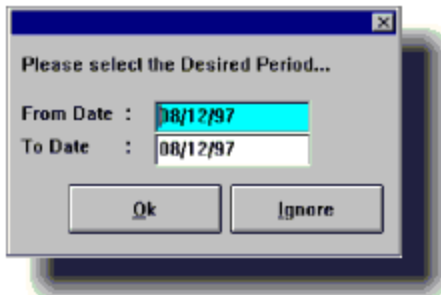
You may then select the required period or press **[Enter]** *twice* for **Yesterday's Payments**.

After you have run the **Register Listing** report, verify it against actual Cash, Checks and Credit Card receipts.

Auditing End of Day

After closing all **Jobs** and entering all **Payments** you should print the **End of day / Inv. Register** report and verify its accuracy.

1. From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

2. Then from the **File Menu** select **Print** and Select the **End of Day/Invoice Register**.
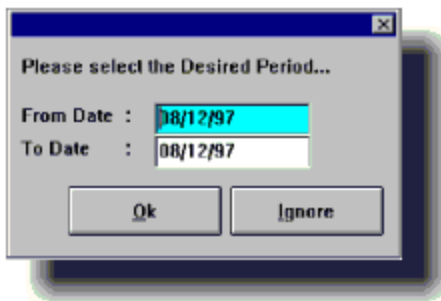
3. You may then select the required period or press **[Enter]** *twice* for **Yesterday's Invoices**.

4. Verify the report against the actual **Invoices** and **Receipts** for that day.

Daily Backup Procedure

At the end of each day's input, you should Backup all your data. Many people fail to perform this extremely important function because: **n** They think it is a waste of their time

n They are not too sure how to do it, and

n They think a data catastrophe will never happen to them.

Needless to say, none of these reasons are good enough not to backup your data on a *regular, daily basis*.

<u>WARNING</u> WE STRONGLY RECOMMEND THAT YOU BACK UP YOUR DATA TO AN EXTERNAL DEVICE SUCH AS A TAPE OR ZIP DRIVE!

(consult the manual of your specific device for more information)

MAKE SURE TO BACK UP DAILY. DEDICATE A DIFFERENT TAPE OR DISKETTE FOR EACH DAY OF THE WEEK.

NOT FOLLOWING THIS ADVICE IS LIKELY TO RESULT IN SEVERE DATA LOSS SOONER OR LATER!

Preparing for Next Day

In this section you will learn how to complete the following tasks:

n [Confirm Tomorrow's Appointments](#) (Optional) **n [Print Tomorrow's Dispatching Report](#) (Daily Run) n** [Print Tomorrow's Pending Jobs List](#)

n [Print Tomorrow's Work Orders](#) (Optional) **n** [Print Calls to Make Report](#) (Optional) Most of the work has all been done. All you need to do now is print out a few reports and prepare for tomorrow.

Confirm Tomorrow's Appointments Let's start by printing Tomorrow's Unconfirmed Jobs list.

Printing Unconfirmed Orders Report

From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

Then from the **File Menu** select **Print** and Select the **Unconfirmed Orders** Report.
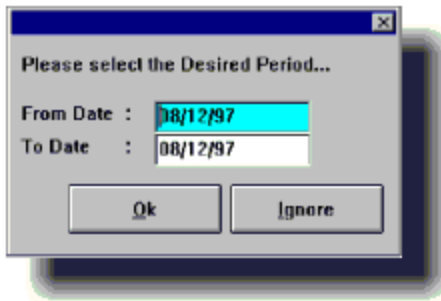
You may then select the required period or press **[Enter]** twice for tomorrows Unassigned Orders.

This list will include all Jobs *not yet confirmed*, if you wish you may call these customers and confirm their appointments.

Job Confirmation

1. From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

2. From the **Forms Menu** select the **Confirmations** option.

3. From the **View Menu** select the **Search and Display** option.

4. Enter the **Job #** of the Job you want to assign and press **[Enter]**.

5. From the **Edit Menu** select the **Edit the Current Record** option. The cursor will be placed on the **Confirmed By** field.

6. Now enter the **Name** of the person who actually confirmed the order. Press **[PageDown]** *twice* to save the record.

7. Repeat **steps 3 to 6** for each of the remaining Jobs on your **Unconfirmed Jobs** list.

Printing Unassigned Jobs Report

From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

Then from the **File Menu** select **Print** and Select the **Unassigned Jobs** Report.

You may then select the required period or press **[Enter]** twice for tomorrows Unassigned Jobs.

This list will include all Jobs *not yet assigned*, this means you probably want to evaluate tomorrow's work-load and decide who's going to perform each Job.

Technician Assignments

This function is *not* required, but may be used by those companies who wish to assign Techs in preparation for tomorrow. This option moves the cursor directly to the **Source** field on the second page of the Work Order. Otherwise, all technician assignments can be made at the end of the working day when closing out Customer Orders.

TIP If you are using this option, you will be able to produce personal job listings for each Technician.

1. From the **File Menu** select **Open,** then select **Orders, Estimates & Invoices File.**

2. From **Forms Menu** select **Tech Assignments**.

3. From the **View Menu** select the **Search and Display** option.

4. Enter the **Job #** of the Job you want to assign and press **[Enter]**.

5. From the **Edit Menu** select the **Edit the Current Record** option. The cursor will be placed on the **Technician** field.

6. Enter the Technician name by doing any of the following:

n Type all or the first part of the name, then **[Enter]**.

n Press the Help ([F1]) key with the cursor in the field.

7. Enter same information for the second Technician if any, or press **[PageDown]** to save.

8. Repeat **steps 3 to 7** for each of the remaining Jobs on your **Unassigned Jobs** list.

Printing Dispatching Report From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

Then from the **File Menu** select **Print** and Select the **Dispatch & Calls Report**.

A menu appears offering 3 **Dispatching Formats**. 1 line, 2 lines, or 3 lines. You may experiment with these options to find the printed version best suited to your needs.
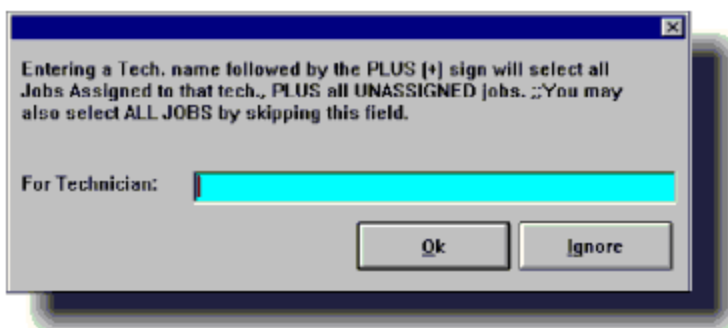
If you assigned technicians to your jobs, you can now print personal lists for each of them by selecting that tech's name. You can produce a report for all technicians by pressing **[Enter]**, leaving the field empty when prompted for a Tech Name.

You may then select the required period or press **[Enter]** twice for tomorrow's Jobs.

This report can now be used for dispatching the jobs for the next day.

Printing Pending Jobs List From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

Then from the **File Menu** select **Print** and **Select the Dispatch & Calls Report**.

Now select the **Pending Jobs List**.
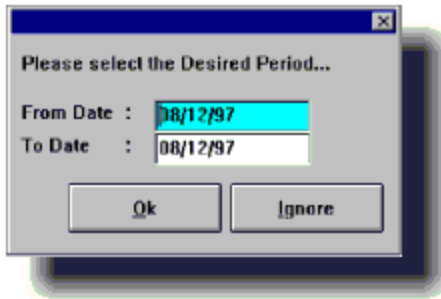
You may then select the required period or press **[Enter]** twice for tomorrows **Pending Orders**.

This list will include all Orders saved as *Pending*, you may now use it to contact these customers and set their appointment.

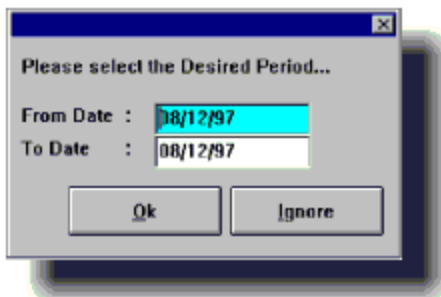**Printing Tomorrow's Work Orders** From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

Then from the **File Menu** select **Print** and Select the **Orders, Estimates & Invoices** option.

Press **[W]** for Work Date

You may then select the required period or press **[Enter]** twice for tomorrows **Work Orders**.

These Work Orders may now be given to the Tech[s] assigned to perform the work.

Printing Calls to Make From the **File Menu**, select **Open** then select the **Orders, Estimates & Invoices** file.

Press **[F4]** to open the **Notes Window.**
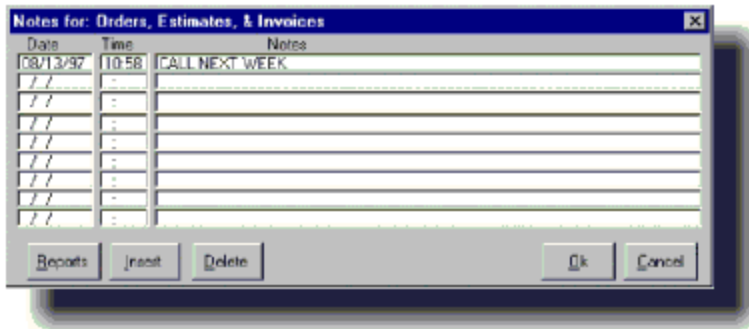
Press **DOS[Alt][R]** or **WIN[Ctrl][Alt][R]** to open the **Notes Report Menu.**

Select the **Calls to Make** Report.

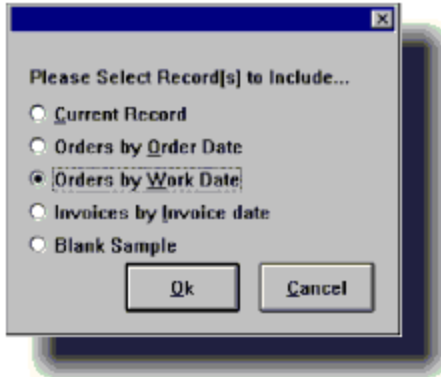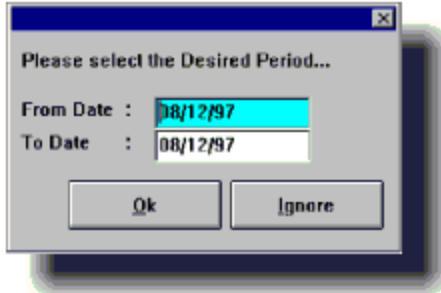You may then select the required period or press **[Enter]** twice for tomorrows **Calls**.

This list will include all Orders marked for a call back, this means you probably want to inspect each **Order's Notes** and then contact these customers to complete processing as needed.

References

[Keyboard Usage](#)

[On Screen Help](#)

[Menus](#)

[Customer Order Status System](#)

[Reports](#)

Keyboard Usage In a busy and growing business, a fair proportion of computer work is *data entry.* **ProfitMaster** does its very best to make that job as easy as possible. Some keys take on almost *magical* qualities when you are in **ProfitMaster**. Well, if not magical, they do become more powerful, and some are shortcuts, which will save you huge amounts of time.

These shortcuts are broken into three categories: n [Menu Keys](#)

n [Data Entry Keys](#)

n [Dialogue Box](#)

You have some Hot Keys available only when navigating the Menus, others only when in Data Entry mode, and others that are available no matter where you are. A detailed explanation of all these special keys is given below.

Menu Keys

To efficiently accomplish your data entry, you will need to navigate through the different Menus that **ProfitMaster** provides. The following keys will help you do that: **Up Arrow [é]** Moves selection bar up.

Down Arrow [ê] Moves selection bar down.

Enter [¿] Activates the selected option.

Any Letter Selects and activates the menu option with a matching first letter. If more than one option starts with that letter, the selection bar will locate the first option starting with that letter. Repeat the same letter to browse through the matching options.

Left Arrow [ç] Displays the Menu to the left.

Right Arrow [è] Displays the Menu to the right.

Hide [Esc] Hides the menu display. Although hidden, the Menu System remains active, and all keys will perform as usual. Pressing **[Enter]** will restore the menu to the screen.

Home [Home] Moves the Selection Bar to the **first** option on the Current Menu.

End [End] Moves the Selection Bar to the **last** menu option.

Help [F1] Provides context sensitive Help on the menu system in general, and the **Current Menu** in particular.

Quick Notes [F4] Activates the Quick Notes function, Available in both **Orders, Estimates, & Invoice File, or Customers, & Billing Records Files**, allowing you to

attach *practically unlimited* notes to specific record[s]. For more information refer to the **Quick Notes** section of the **File Menu, under Orders, Estimates, & Invoices, or Customers, & Billing Records**.

Dialer [F8] Activates the Automatic Dialer function, allowing you to select any Phone Number from the Screen for the computer to dial.

Calendar [F9] Activates the Automatic Calendar function, allowing you to view your work schedules. For more information on the Calendar, refer to the **Scheduling** section in the **Daily Procedures**, Section.

Data Entry Keys

When in a **Data Entry** mode, although most keys continue to possess the same attributes as in the Menu Keys section, you will have even more *magical* keys at your disposal.

Up Arrow [é] Moves cursor to the previous field.

Down Arrow [ê] Moves cursor to the next field.

Enter [¿] Moves cursor to the next field.

Left Arrow [ç] Moves cursor one character left.

Right Arrow [è] Moves cursor one character right.

Insert [Ins] Toggles between the **Insert** and **Overstrike** modes. The normal mode is Overstrike. When Insert is active the cursor's appearance will change from an underline to a block.

Delete [Del] Erases the character at the cursor position, while pulling trailing characters one space left.

[Backspace] The Backspace Key moves the cursor one character to the left, erasing the character as it moves.

Home [Home] Moves the cursor to the left most position in the current field.

End [End] Moves the cursor to the right most position in the current field.

PageDown [PgDn] Moves the Cursor down the screen form through and beyond all of the following fields. You will normally use this key as a shortcut when done entering information, instead of pressing **[Enter]** at every field.

Control [Ctrl] This key by itself does nothing, and is only used in combination with other keys. For example:

[Ctrl][è] Press the **[Ctrl]** key, and while holding it down, press the [è] (Right Arrow) key, then release both keys. This key Combination moves the Cursor, to the first character of the following word in the current field.

[Ctrl][ç] Press the **[Ctrl]** key and while holding it down, press the [ç] (Left Arrow) key. This key Combination moves the Cursor, to the first character of the preceding word in the current field.

[Ctrl][Home] This key Combination moves the Cursor, to the first field of the current Screen Form.

[Ctrl][End] This key Combination moves the Cursor, out of the Service Box to the first field thereafter when entering job information.

[Ctrl][Enter] This key Combination inserts an empty service line, pushing all subsequent lines down. This allows you to insert a new line between two existing lines when entering job information.

[Ctrl][Backspace] Press the **[Ctrl]** key and while holding it down, press the **[Backspace]** key. This key combination erases the current service line, while pulling all trailing lines one line up. This allows you to delete a service line without creating an empty line in the middle of your Job Orders or Invoices.

[Ctrl][Y] This key Combination erases all characters from the cursor position to the end of the Current Field.

[Alt] The Alternate key by itself does nothing, and is only used in combination with other keys. For example:

[Alt][X] Press the [Alt] key, and while holding it down, press the **[X]** key, then release both keys. This key combination marks the job as canceled, and changing the total amount to $0.00 when entering information in the Service Box using the Close Job form.

Escape [Esc] Quit data entry and return to the menu.

Help [F1] Provides context sensitive help about valid input for the current field. The Help will normally be in the form of a Bar Selection Window, appearing at the top left of the screen. Most fields do not require such specific input, and will not have this special feature. More information will follow in the Look-up Help Windows section.

Duplicate [F2] Duplicates information from the previously entered record, and places it into the current field in the current record. This will save a lot of time when entering a series of records with similar data.

Undo [F3] Undoes the changes made to the current field and restores the original information present when the field was selected. This will work only up to the point that you select another field.

Quick Notes [F4] Activates the Quick Notes function, Available only when in the **Orders, Estimates, & Invoice File, or Customers, & Billing Records Files**, allowing you to attach *practically unlimited* notes to specific record[s]. For more information refer to the **Quick Notes** section of the **File Menu, under Orders, Estimates, & Invoices, or Customers, & Billing Records**.

Last Field [F5] Moves the cursor to the **Last Field** on the screen.

Dialer [F8] Activates the **Automatic Dialer** function, allowing you to select any Phone Number from the Screen for the computer to dial.

Calendar [F9] Activates the **Automatic Calendar** function allowing you to instantly view your work schedules. More information on the Calendar will follow in the Scheduling section.

🄳🄾🅂 **New Session [F10]** This extremely powerful feature allows you to put the current work session on hold, and open a **New Session**. For instance, you could be entering an order when another Customer calls to reschedule. Instead of keeping the Customer waiting while you finish what you are doing, you simply press **[F10]**. This puts the first session on hold and opens a secondary session where you may reschedule the order for that Customer.

When you are finished working in the secondary session, select Exit from the Files Menu (or Quit Session from the Data Menu) and you will resume the previous session at exactly the point you left it. When you are in a secondary session, the session number will be displayed to the far right of the Exit Line in the Files Menu. For example, |02 would indicate you are in the second session, and |03 the third and so on. If you are in the first session no number is indicated. You may have up to 99 work sessions opened simultaneously. This feature alone makes ProfitMaster unique in its field.

CalcDate [+] or **[-]** Available in all **Date Fields**, this feature allows an easy way to calculate dates. Pressing [+] followed by a number will automatically enter a date that many number of days in the future. Similarly Pressing [-] followed by a number will automatically enter a date that many number of days in the past. The *base date* for the

calculation is the date previously entered in that field, or today's date if none entered.

Dialog Box

A Dialog Box will appear whenever you need to provide additional information to complete a task. Dialog Box may provide warnings/messages or present options for you to set. Your **ProfitMaster** implements the following types of **Dialog Box**:

Check Button Boxes

Options Button Boxes

Command Button Boxes

Check Buttons Box Check Buttons Box will present you with several buttons (sets of square brackets **[ ]**) each representing a different option. Buttons are either **ON** (identified by **[X]**) or **OFF** (identified by **[ ]**). More than one button may be set to **ON** at the same time.
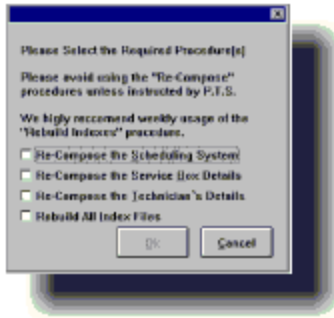
Up Arrow [é] Moves cursor to previous button.

Down Arrow [ê] Moves cursor to next button.

Tag / Untag [Space Bar] Will reverse the *current button* from **ON** to **OFF** and vice-versa.

Enter [¿] Accepts your choices closes the box and resumes current operation.

Option Buttons Box Option Buttons Box will present you with several buttons (sets of rounded brackets **( )**) each representing a different option. Buttons may be set to **ON** (identified by **(t)**), or **OFF** (identified by **( )**). Only one button may be set to **ON** at the same time.

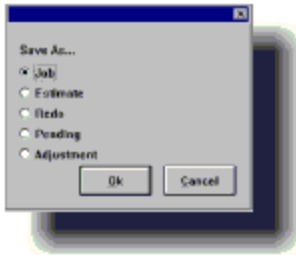**Up Arrow [é]** Moves cursor to previous option.

Down Arrow [ê] Moves cursor to next option.

Tag / Untag [Space Bar] Will set the *current option* to **ON** therefore setting the previously **ON** option to **OFF**.

Enter [¿] Accepts the choices, closes the box and resumes current operation.

Command Buttons Box

Command Buttons Box will present you with several buttons each representing a different action. A Selection may be made by pushing either one of these buttons.
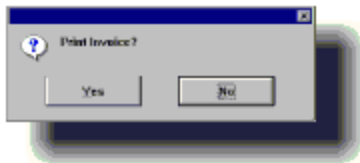
Left Arrow [ç] Moves cursor to button to the left.

Right Arrow [è] Moves cursor to button to the right.

Enter [¿] Selecting the *current button* action, closes the box and resumes current operation.

On-Screen Help System You may have already encountered the **ProfitMaster** Help System. Being intuitive, it will generally be there when you need it, sometimes before you ask for it.

The **On-Screen Help System** is made up of three parts: l **Context Sensitive Help**

l **Look-up Help Window**

l **Automatic History Lookup**

Context Sensitive Help

If you need Help at any time, from any field, enter [F1] and Help relevant to the field you are in will appear on the screen. That's really all that need be said about the context sensitive help.

Lookup Help Window

In certain key fields, a **Lookup Help Window** will open so you can select information from it.

Many fields in various Files and Forms have the **Look-Up Help** feature, not only saving you data entry time, but ensuring the data that is entered is *correct* data.

An easy example of how the Lookup Help window can save you time would be when entering a Customer Order. Several records have been provided in your database to assist in providing an example of this system capability. Let's make use of some of this data to illustrate just a few of the powerful capabilities of your system.

Using your Mouse or the **Left [ç]** and **Right Arrows[è]** move to the **File Menu**.

From the **File Menu** select **Open**, then select **Orders, Estimates & Invoices** option.

The User Interaction Line will display "**Loading File : ORDERS ...**",

Using your Mouse or the **Left [ç]** and **Right Arrows[è]** move to the Edit Menu.

Select the **Edit Menu**

Add New Record

We want to add a Work Order Record and we see that the Add New Record option is already highlighted. Just press the **[Enter]** key. You will now be presented with a blank Customer Order Form to fill in.

The first piece of information you are asked to enter is the **COMPANY NAME**. If this is an order for a Customer you already have on file with the **ProfitMaster**, you need only press [F1] at this point and a window will open up listing all of your Customers.
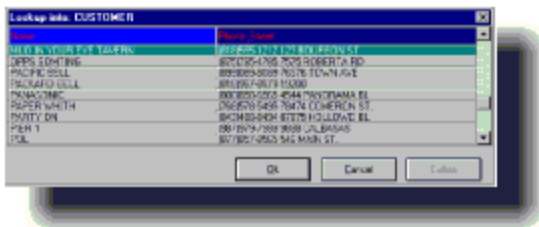
This Help window has two columns. The left lists Customer *name* and the right lists *phone #* and *street address*. You can move from column to column by using the *left* and *right* arrow keys. With your cursor in the Customer *name* column, your system will perform a **Dynamic Search** as you enter letters.

Let's use the 'Mud in Your Eye Tavern' to illustrate. With the cursor in the Company Name field of the Customer Orders, Press [F1], for Help.

Now, slowly, begin to spell out the company name. Notice the search begins with the entry of the letter 'M'. By the time you have the letter 'U' entered, the 'Mud In Your Eye Tavern' is found. Use the Down Arrow to highlight it and Press **[Enter]** to select it. Your system let's you know the

customer has been located by providing a warning sound when you pressed Enter.

Automatic History Lookup

If you are entering an order for a Customer that you have already entered into **ProfitMaster**, (such as the above example) you will hear a warning tone and a message will be displayed containing the Customer name and ID, and

asks:

If you select *Header*, Site and Billing information will be copied into the new order.

If you select *Whole Job*, both Site and Billing information, and most Job information from the Master job (see your Setup Manual under Customers & Billing for details on the Master Job) will be copied into the current Job Order.

If you select *None*, **No information** will be copied from Master records.

For purposes of our example, select None, then Press **[Esc]** to return to the Menu. We will cover this topic in more detail in Chapter 3. Menus

Menus

ProfitMaster has **six** main menus, and although you access them in exactly the same way, they each have distinctly different functions.

Along the top of the screen, below the **Status Line**, the main headings of each menu are always visible on the **Menu Indicator Line**. It reads: n **File**

n Edit

n View

n Forms

n Utilities

n Help

To access the different menus, simply use your Mouse or your left and right arrow keys, and the menus will open and close. If you wish to make a selection from any open menu, you can use the up and down arrows to move to the required option, then press **[Enter]** to select that option. Alternatively, from an open menu, press the first letter of the required option and it will be selected.

File Menu

The **File Menu** contains the following options: New - Not activated for Version 5.5

Open - Opens files for processing

Save - Not activated for Version 5.5

Save As - Not activated for Version 5.5

Print - Allows printing of reports

Print Setup - Allows you to select and configure the Printer you will be using.

Exit - Allows you to leave your **ProfitMaster** The File Menu allows you to open the following files: **n** [Orders, Estimates & Invoices](#)

n [Services & Sale Items](#)

n [Personnel (Techs & Agents)](#)

n [Sources of Advertising](#)

n [Customers & Billing Records](#)

n [Calendars Definition](#)

n [Cash Register](#)

n [General Ledger](#)

n [Chart of Accounts](#)

Orders, Estimates and Invoices

Choose this file when you wish to Add, Edit, Delete or Close a Customer Order, Estimate or Invoice. Apart from database information, this File also has an Automated Status System.

Service & Sales Items

This is the file where you maintain the list of Services or Sale or Rental Items your company offers. As your business grows, so too can your Service & Sale Items and like all files in **ProfitMaster**, it can contain an unlimited amount of entries.

Personnel

The primary purpose of this file is to store information on the Agents and Technicians who work for you, but you may enter information on any person in your organization.

Sources

It is extremely important to know the effectiveness of your advertising. In this file you will store the various sources your work comes from. If the particular source is paid a commission, a percentage may be entered so **ProfitMaster** can calculate the commission amount for you.

Customer & Billing Records

This file contains basic Customer information like Company Name, Address, and so on. It also contains information on their credit status, job history and contact information, all updated automatically by **ProfitMaster**. This File also offers the **Quick Notes**, **Contact Management** **Scheduling a Call to Make**, **Printing the List of Calls to Make**, and **Mail Merge** features.

Quick Notes

This powerful feature allows you to attach *practically unlimited* notes to any **Job Record**. These notes are accessible anywhere within the **Orders, Estimates, & Invoices** file, but will not be visible on any of the forms you will be providing your customers.
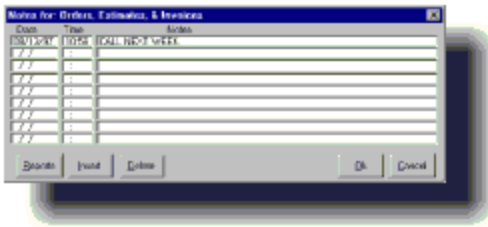
Quick Notes are accessed by pressing [F4] any time an Order shows on the screen. The **Quick Notes** also offers Contact Management features (See Section on **Customer & Billing Records**).

Contact Management System

The contact management features allows you to mark specific records to receive a call at a certain Date and Time. You can later print a list of all records marked to be called on specific days.

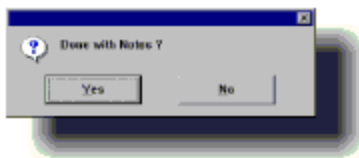**Scheduling a Call to Make 1.** Activate the **Quick Notes** window by pressing [F4]

2. Move cursor to beginning of the next *empty* line.

3. Enter the **Date** to make the call, into the **Date Field**, and press **[Enter]**.

4. Enter the required **Time** to make the contact if any, and press **[Enter]**.

5. Press enter at the *empty* note field (no note yet!).

6. Press **[Y]** to save the tag.

Printing the List of Scheduled Calls 1. Activate the **Quick Notes** window by pressing [F4]

2. Press (Windows **[Ctrl]**+)[Alt][R] to open the **Notes Reports Menu**.

3. Select the **Calls to Make** report.

Please select the Desired Period...

From Date : 08/12/97
To Date   : 08/12/97

Ok   Ignore
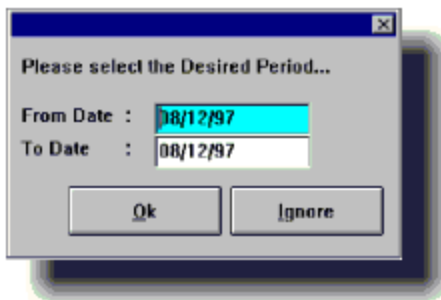
4. The Calls to Make report assumes you are Keeping up with your calls on a daily basis and therefore will only allow "today's" date to be reflected in the period ... Press **[Enter]**.

Mail Merge

This extremely powerful feature is another major addition to **ProfitMaster**. **Mail Merge** is simply the *merging* of selected Customer information, like their names and addresses, with a document that you intend to *mail* to them, resulting in a personalized mailing. For more information please refer to the **Reports Chapter** under **Customer & Billing Records**.

Calendars

Here is kept a list of the various scheduling calendars you create for the various areas and/or subdivisions your company covers. Contained in this file is the calendar name ("EAST", for example), the symbol for it, possibly "E", and the date the calendar was created.

Cash Register

This File contains a record of all payments received. As each payment is received and entered into the Cash Register file, it is automatically posted to the proper Customer record in the Accounts Receivable module.

General Ledger

In **ProfitMaster**'s sophisticated system, accounts are automatically updated whenever and wherever they are accessed. Consequently far less time than normal is required to maintain the G/L as no posting is required.

Chart of Accounts A standard Chart of Accounts template is provided with **ProfitMaster**, but you may modify this to suit the requirements of your company. However, you may not Delete *any* Account if it contains any financial records.

NOTE You may wish to consult with your accountant or bookkeeper before setting up the Chart of Accounts file.

When shipped, **ProfitMaster** is already set up with the following accounts: ***Assets***

n Accounts Receivable **n** Cash In Bank ***Income***

n Sales

n Interest Charges Income ***Liabilities***

n Agents

n Sources

n Technicians ***Expenses***

n Commission - Agents **n** Commission - Sources **n** Commission - Techs **n** Labor - Techs **n** Advertising Expense **n** Phone Expense **n** Office Expense **n** Payroll

NOTE If any Account is described as system in the SPECIAL field, you may only modify the Account ID Number, and then only if the Account is empty.

The Customer Order Status System While reviewing a customer order the status of that order can be found in a field just above the scheduling field. One of the following messages will be displayed in the **Status** field to reflect the current status of the Customer Order currently displayed. These messages are: "Future Job <Tech Name>"

When the job is scheduled to a future date.

"Today's Job <Tech Name>"

When the record is a job for *today,* assigned to "Tech Name".

"Today's Job <Not dispatched Yet>"

When the record is *not an assigned* job for *today.*

"Exception-Exception Reason <Tech Name>"

When the record is for a canceled job.

"*** Job Outstanding *** <Tech Name>"

When the job should have been closed but was not.

"Paid in Full <Tech Name>"

For fully paid invoice record.

"Balance: AMOUNT <Tech Name>"

For an open invoice with a *future* Due Date.

"Balance Due: AMOUNT <Tech Name>"

For an open invoice with a *current* Due Date.

"*** Balance Overdue : AMOUNT *** <Tech Name>"

For an open invoice with a *past* Due Date.

"*** VOIDED *** <Tech Name>"

For a voided invoice record.

"* Pending * <Tech Name>"

When the record signifies a future call to make assignment.

"* Pending * <Not Called Yet>"

When the record signifies a call to make *today*.

"** Pending Outstanding <Tech Name>"

When the record signifies a *late* non completed call commitment.

"* Future Redo * <Tech Name>"

When the record is marked as a future Redo of a previous job.

"* Redo * <Tech Name>"

When the record is Redo for today of "Tech name".

"* Redo * <Not Dispatched Yet>"

When a Redo for today is not assigned yet.

"* Redo Done * <Tech Name>"

When the record is for a completed Redo Job.

"** Redo Outstanding <Tech Name>"

When the record signifies a non completed redo.

"* Future Estimate * <Tech Name>"

For an estimate to be done in the future "* Estimate * <Tech Name>"

For an estimate to be done today by "Tech Name"

"* Estimate * <Not Dispatched Yet>"

The estimate is for today and is not assigned.

"Est. Canceled-Reason <Tech Name>"

Showing the cancellation reason for an estimate by "Tech Name"

"** Estimate Outstanding** <Tech Name>"

For an estimate which was not closed yet, but should have been.

Reports

Following is a listing of all the reports available, organized by the files they are available from:

[Orders, Estimates & Invoices](#)

[Service & Sales Items](#)

[Personnel](#)

[Sources of Advertising](#)

[Customer & Billing](#)

[Cash Register](#)

[General Ledger](#)

[Chart of Accounts](#)

[Calendar Definitions](#)

Customers & Billing Reports

n [Customer Listing](#)

n [Mail Merge](#)

n [Mailing Labels](#)

n [Current Calls to Make](#)

n [Outstanding Calls to Make](#)

Orders, Estimates & Invoices Reports n [Booking List](#)

n [Dispatching & Calls List](#)

n [Orders/Estimates/Invoices](#)

n [Outstanding List](#)

n [End of Day/Inv Register](#)

n [Exceptions & Voids](#)

n [Unconfirmed Orders](#)

n [Unassigned Jobs](#)

n [Accounts Receivables](#)

n [Customer History](#)

n [Sales Analysis](#)

n [Agent Commission](#)

n [Source Commission](#)

n [Tech Compensation](#)

n [Agent Performance](#)

n [Source Performance](#)

n [Tech Performance](#)

n [Office Performance](#)

n [Performance by Zip](#)

n [Mailing Labels](#)

Service & Sales Items Reports

n [Items Listing by Category](#)

n [Items Listing by Number](#)

n [Items Listing by Name](#)

n [Items to Order by Vendor](#)

Personnel Reports

n [Personnel Listing](#)

n [Mailing Labels](#)

Sources of Advertising Reports

n [Sources Listing](#)

n [Mailing Labels](#)

Cash Register Reports

n [Reprint Receipt](#)

n [Print Header](#)

n [Register Listing](#)

n Summary Listing

Calendars Definition

Not activated for Version 5.5

General Ledger Reports

n [Account Statement](#)

n [P & L Statement](#)

n [Journal Listing](#)

n [Trial Balance](#)

n [Balance Sheet](#)

Chart of Accounts Reports

n [Accounts by Number](#)

n [Accounts by Name](#)

n [Accounts by Type](#)

The **File Menu** allows you to **Exit** from **ProfitMaster ALL** files will be closed and you will be returned to DOS or Windows.

Edit Menu

It is from this menu that you will be able to access your data in the selected file. The options available from this menu are: **n** Undo - Not activated for Version 5.5

n Redo - Not activated for Version 5.5

n [Add New Records](#)

n [Edit the Current Record](#)

n [Delete the Current Record/Void the Current Invoice](#)

n [Undelete the Current Record/Recall Invoice](#)

Add New Records

This option Adds a new record to the currently selected file.

Edit the Current Record If you select this option you will be able to modify data in the current record of your selected file. You may **not** modify the following: **n** A Cash Register Record **n** Account # or Account Balance in the Chart of Accounts **n** A G/L Record

Delete/Void this Invoice Occasionally you will want to [Delete a record](). Selecting this function allows you to mark the Current Record for deletion. You may **not** Delete the following: **n** Any Cash Register Record **n** Any General Ledger Record **n** Any *active* Chart of Accounts Record When you activate the Delete Option, you will be asked for confirmation. The system will prompt you:

Any key other than **[Y]** will return you to the menu without changing or deleting anything.

Undelete the Current Record

Once a record has been deleted, your **ProfitMaster** will continue to have access to it unless you have Packed your files (See Utilities Menu for explanation). The **Undelete Option** will allow you to restore a record you have Deleted.

View Menu

n [Search and Display](#)

n [Next Record](#)

n [Previous Record](#)

n [First Record](#)

n [Last Record](#)

n [Sort by](#)

n [Include Deletions](#)

Search and Display Record

If you wish to View, Edit or Delete a particular record, you would first select Search & Display, then enter in one piece of "key" information in the blank screen form that is presented to you. Your system will then immediately present that record for your View, as the Current Record. What qualifies as "[key](#)" information depends upon the selected file.

Once found, that record will become the Current Record, and be displayed on the screen. The **User Interaction Line** will prompt you to press any key to return to the menu. If no match or multiple matches are found, the **Automatic Help Window** will appear at the top left part of your screen to help you locate the record you are looking for.

Key Fields

[Orders and Estimates File](#)

[Service and Sales Items File](#)

[Personnel File](#)

[Advertising Sources File](#)

[Customer & Billing File](#)

[Calendars File](#)

[Cash Register File](#)

[General Ledger File](#)

[Chart of Accounts File](#)

Orders and Estimates File Key

the key fields are:

n Job #

n PO # (if used)

n Invoice #

n Company

n Phone #

n Last Name

n Site Address

n Bill To name

Service and Sales Items File

the key fields are:

n Item

n Description

Personnel File

the key fields are:

n Id #

n Name

Advertising Sources File

the key fields are:

n Id #

n Name

Customer & Billing File

the key fields are:

n Customer ID #

n Company Name

n Last Name

n Customer Address

Calendars File

the key fields are:

n Calendars

Cash Register File

the key fields are:

n Receipt #

n Billing ID #

n Receipt Date

General Ledger File

the key fields are:

n Date

n Account #

n Journal #

Chart of Accounts File

the key fields are:

n Account #

n Account Name

Next Record

Selects and displays the Next Record in the selected file in the *natural* order, or as sorted by the *last used* key field search. This option is useful in the event multiple possible records are presented in the Help Window. It allows you to view the Next record on the list without performing the Search again.

Previous Record

Selects and displays the Previous Record in the selected file, in the *current* sort order.

First Record

Selects and displays the First Record in the selected file, in the current sort order.

Last Record

Selects and displays the Last Record in the selected file, in the current sort order.

Sort By

The file being searched may be sorted by:

Entry Order Phone #

Work Order Zip Code

L. Name Agent

Bill To Company

Work Date Bill Phone

Order Date Invoice #

Source PO #

Include Deletion

This option allows you to include all records previously
Deleted, assuming the files have not been Packed.

Forms Menu Form options vary depending on the file you are currently in. Forms are the visual part of a data file. When a data file has more than one form, like the **Orders, Estimates & Invoices** file, it means that different actions are carried out using this file. The look of the form depends on the file in use, and the action being carried out.

The following have one standard screen form: **n Service & Sales Items**

n Personnel (Techs & Agents) n Sources of Advertising

n Customers & Billing Records n Calendars

n Cash Register

n Chart of Accounts

The Following have more then one screen form: **n [Orders, Estimates and Invoices](#)**

n [General Ledger](#)

Orders, Estimates & Invoices File

This file has the following form options:

n [Customer Orders](#)

n [Confirmations](#)

n [Technician Assignments](#)

n [Close Job / Invoices](#)

Customer Orders

In this form you may Add, Edit, Select or Delete Customer Orders. Moving through the records is made easy with the Search and Display, Next, Previous, First and Last Record options.

Confirmations

This form is not **required** for the efficient processing of orders, but may be useful for those companies who require orders to be confirmed before sending a technician to the job. Similar movement through the records is provided, but you may *not* Add or Delete records in this form.

Technician Assignment

This form is not required for the efficient processing of orders, but is available to those companies who wish to assign Techs after the Work-Order is saved. Otherwise all technician assignments can be made at the end of the working day when closing out Customer Orders. You may *not* Add or Delete records in this form

Close Jobs

This important form is where you will close out the jobs at the end of the day, bringing current all the information regarding a completed job. You will add on "Add-ons", enter the Total Amount, and generally bring the record up to date, but you may *not* Add or Delete records in this form.

Utilities Menu

[Preferences](#)

[Change Date](#)

[Back up](#)

[Restore](#)

[Pack Files](#)

[File Maintenance](#)

Preferences

Now you may choose from:

n [Security](#)

n [Personal](#)

n [Global](#)

n [Header](#)

n [Footer](#)

NOTE If you did not sign on as SUPERVISOR the Security Option will be dimmed and un-selectable.

Security Only the SUPERVISOR, or a designated representative (Level = 99) may select this option. As supervisor you will be able to view/set/change, all other User Names and Passwords. In addition you will be able to limit what each of the Users may be able to do on your system by setting their rights with regard to: **n Add Invoice**

n Modify Invoice

n Delete Invoice

n Daily Reports

n Periodic Reports

A 99 under the Level column will automatically provide access to everything.
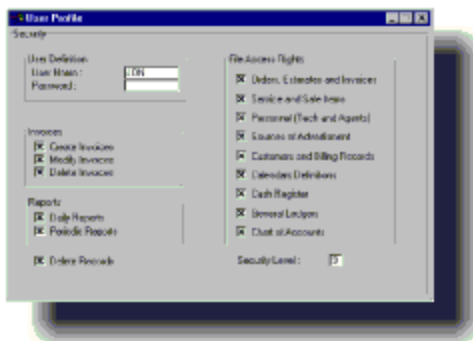
Removing User Definition

To remove a **User Definition** from the table of authorized users, place your cursor on the User Name and Press **[Delete]**.

Creating New User Definition Simply move cursor beyond the last User Definition, new line will automatically be generated. Now you can enter the new **User Definition**.

Personal

System settings that are made through this menu selection effect the settings of that user only. See the Setup Manual for additional details.

Global

See the Setup Chapter for details.

Header & Footer

See the Setup Chapter for details.

Backup

At the end of each day's input, you should backup all your data. The Backup feature is not available in the Windows version as it is no longer a recommended procedure. Under Windows we recommend a complete backup of your whole system utilizing a backup tape. Many people fail to perform this extremely important function because:

n They think it is a waste of their time

n They are not too sure how to do it, and

n They think a data catastrophe will never happen to them.

Needless to say, none of these reasons are good enough not to backup your data on a *regular, daily basis*. As for not knowing how to do it - **ProfitMaster** provides you with a simple way to back up your data with a single keystroke.

NOTE ProfitMaster expects you to be backing up to the A: floppy drive. If this is not the case, the CBACKUP.BAT file can be modified. Consult qualified help, or call us at (818) 876-8650.

It is a very good idea to have a dedicated set of diskettes for each day of the week, labeled Monday, Tuesday, Wednesday, etc. These diskettes should be kept *away from the office*. Each day you should bring in that day's backup set, and use them to backup your data.

Here is the reasoning behind this hint:

n Your backup diskettes should be kept away from the office because a fire, flood or other destructive disaster can destroy both your equipment and your backup diskettes.

n Multiple sets of backup diskettes are needed because, in the event of a data catastrophe occurring, you may find out your backup diskettes are faulty - a definite possibility. With multiple sets, you will have other backup sets available.

Restore

In the event of data loss, you may need to Restore your data files from the floppy diskettes on which they were Backed Up. Press the Restore option key and follow the on-screen instructions. You may also want to call us *before* using this option as this will result in overwriting the current data.

Pack Files

After you have used the Delete Record function, Packing the data files permanently erases those records marked for deletion, so be very careful when you use this option.

TIP It is not necessary to Pack files every time you perform Deletions. In fact, as this can be a lengthy process depending on the size of your Data Files, this function need only be used after extensive deletion activity, if at all.

File Maintenance Unless your computer system is protected with an Un-interruptible Power Supply (UPS), or at the very least, a surge suppressor, data and index files can become corrupted by a power failure. **ProfitMaster** is designed to minimize the risk to your data and controls the circumstances under which information is written (or sent) to your hard drive. Running the File Maintenance on a regular weekly basis speeds up data access and makes encountering problems with data corruption much less likely. File Maintenance is a *must* after a power failure or "brown out" interrupts any session.

Running the File Maintenance on a regular basis is a good idea, and will take care of most indexing problems before they occur. On very rare occasion's, further attention is needed. For these times we provide the "Recompose" functions: Scheduling System

Service Box Details

Technician Details

All Index Files

Re-Compose the Scheduling System

Should you find a discrepancy between the number of jobs as listed on your dispatching sheet, and the number appearing on the Calendar's window, you can use this option to recompose the Calendar's data.
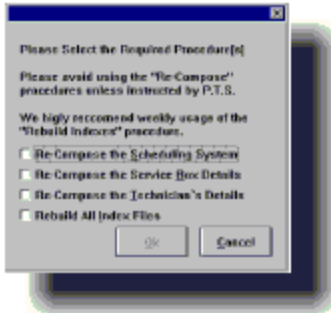
Re-Compose the Service Box Details

Should you find a discrepancy between the service description box and the work order, such as total of lines listed or the services listed, you can use this option to recompose the Service Lines File data.

Re-Compose the Technician Details

Should you detect a discrepancy with the Technician compensation information, you can use this option to recompose the tech details data.

Rebuild All Index Files

This option should normally be set to ON as it will speed the system performance and guaranty accurate system performance. We recommend that you use this option weekly.

All the above options default to **No,** so under normal circumstances you will press the [**I**] for *Rebuild **I**ndex* and then the **[Enter]** key to run the Normal Maintenance function.

Change Date

If, for any reason you should find that your computer system date is incorrect, this option will allow you to reset the date for your session in **ProfitMaster**. It should be noted that this function will not reset your system clock.

You should then look into the problem that caused the clock to malfunction. Usually it is an indication that the battery, which runs the clock, needs replacing. Please consult your hardware documentation for assistance in this matter.

Help Menu

Although pressing the [F1] key will always give you immediate, relevant, context sensitive assistance, you may wish to browse through the Help text at a less hurried time. There is easy to read text help available on: **n [On Help](#)**

n [File](#)

n [Edit](#)

n [View](#)

n [Forms](#)

n [Utilities](#)

n [About...](#)

On Help

Assists you with the Help system in general.

File

Gives you help on using the File Menu.

Edit

Gives general help on using the Edit Menu.

View

Gives general help on using the View Menu.

Forms

Tells you how to select and use the different Form Screens available from your current operation.

Utilities

Gives general help on using the Utilities Menu

About

Provides information about your version of **ProfitMaster**. Optional modules will also be noted here.

Reports

Report Procedures

Standard Reports Behavior

Orders, Estimates & Invoices

Services & Sale Items

Personnel

Sources of Advertising

Customers & Billing Records

Cash Register

General Ledger

Chart of Accounts

Report Procedures

The reports available in the **ProfitMaster** are grouped by the data file to which they relate. Each of the data files you select will therefore offer a different list of reports.

After you have selected your report, you will generally have the option to display reports on the screen, or print them. Following is a detailed listing of each of the **ProfitMaster** reports available from each file.

Standard Reports Behavior

Many of these reports provide the option for identifying multiple companies. If you have the Multi-Company option you will see the following:

Press **[Enter]** for All Companies.

Orders, Estimates & Invoices From the **File Menu** select **Open** then select **Orders, Estimates & Invoices**.

From the **File Menu** select **Print.**

[Booking List](#)

[Dispatch & Calls List](#)

[Pending List](#)

[Order/Estimate/Invoice](#)

[Outstanding List](#)

[End of Day/Invoice Register](#)

[Exceptions & Voids](#)

[Unconfirmed Orders](#)

[Unassigned Jobs](#)

[Estimated Costing Sheet](#)

[Customer History](#)

[Sales Analysis](#)

[Agent Commission](#)

[Source Commission](#)

[Tech Compensation](#)

[Performance Reports](#)

[Mailing Labels](#)

Booking List

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Advertising Source

n Job #

n Company

n Name of Client*

n Phone*

n Street

n City*

n Zip*

n Primary Service*

n Unit*

n Quantity*

n Price*

n Date*

n Time Slot*

n Requested Time

n Comments*

n Agent*

Plus:

n **Group Summary** containing Total Prices, Average Job Price for Each Category, and Group Count.

n **Report Summary** containing Total Prices, Average Job Price, and Report Count.

To Run:

Select **Booking List** and press **[Enter]**. The following screen prompts will appear.
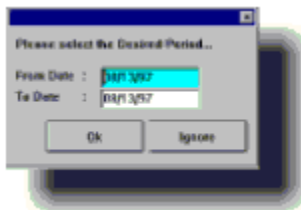
As you can see it defaults to the Current System Date. Enter the required Date Range and Press **[Enter]**.
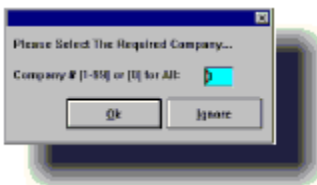
Press **[Enter]** for All Companies.

NOTE The above screen prompt, will appear in every report if you are using the Multi-Company *version of ProfitMaster.*

Dispatch & Calls List

This report is available in 4 separate formats and contains the following information. Those items marked with an asterisk (*) do NOT appear on the screen version.

Dispatch - 3 lines

n Date Range of Report

n Date Report Printed

n Job #

n Last Name*

n Phone*

n Street

n City

n Tech - Space provided to enter this information manually.

n Booking Price*

n Total Price* - Space provided to enter this information manually.

n Paid* - Space provided to enter this information manually.

n Area/Item*

n Description*

n Comments*

n Time

Dispatch - 2 lines

n Date Range of Report

n Date Report Printed

n Job #

n Last Name*

n Phone*

n Street

n City

n Tech - Space provided to enter this information manually.

n Booking Price*

n Total Price* - Space provided to enter this information manually.

n Paid* - Space provided to enter this information manually.

n Area/Item*

n Description*

n Comments*

n Time

Dispatch - 1 line

n Date Range of Report

n Date Report Printed

n Job #

n Last Name*

n Street

n City

n Description*

n Time

n Comments*

n Total Price* - Space provided to enter this information manually.

n Paid* - Space provided to enter this information manually.

Pending List

This report will print a list of all those orders you designated as **Pending**.

n Date Range of Report

n Date Report Printed

n Job #

n Company*

n Name*

n Phone

n Street

n City

n Zip*

n Primary Service*

n Unit*

n Quantity*

n Price*

n Job Date*

n Estimated Job Duration

n Requested Time

n Comments*

n Agent*

n Tech

To Run:

Select **Dispatch & Calls List** and press **[Enter]**

Select:

n Dispatch - 1 Line or

n Dispatch - 2 Line or

n Dispatch - 3 Line or

n Pending List

You may choose any of the following:
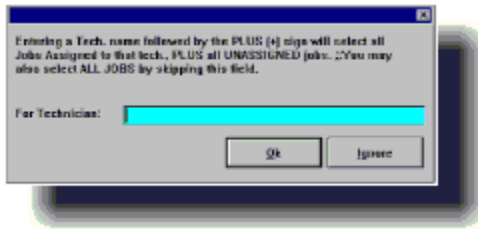
n Enter Tech Name for a report on that Tech's Jobs

n Enter Tech Name and the plus sign (+) for a report on **that** Tech's Jobs **and** the Unassigned Jobs

n Leave empty to get a report on ALL Tech Jobs

As you can see it defaults to the Current System Date. Enter the required Date Range and Press **[Enter]**.
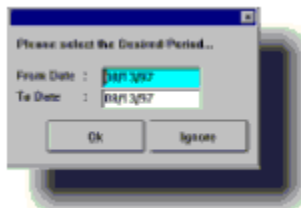
Order/Estimate/Invoice

This report allows you to display and print previously created Job Orders, Invoices and Estimates and contains the following information:

n Job #

n Booking Date

n Company Name

n Client Name

n Billing Location

n Billing Phone

n Site Location

n Site Phone

n Area/Item

n Size

n Service/Description

n Unit

n Quantity

n Estimated Job Time

n Taxable Status

n Dollar Amount of Service

n Sub Total

n Tax Amount

n Total

n Amount Paid

n Balance

n Due Date

n Status of Job

n Job Day

n Job Date

n Job Time Slot

n Requested Time

To Run:

Select **Order/Estimate/Invoice** and press **[Enter]**.

Use your mouse or up and down arrows to move to your choice and press the Space Bar to mark your choice. Press **[Enter]** to continue.
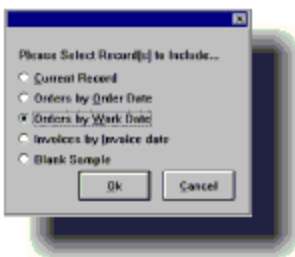
Current Record will offer to print the record showing on the screen.

Orders by Order Date will print orders in the date range you select, based on either *Order Date*.

Orders by Work Date will print orders in the date range you select, based on *Work Date*.

Invoices by Date will print invoices in the date range you select, based on Closed Date.

Blank prints a blank Job Order.
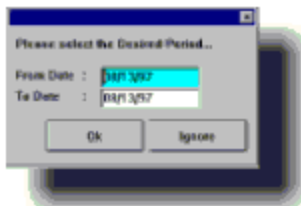
Outstanding List

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Job #

n Company*

n Name*

n Phone*

n Street

n City

n Zip

n Primary Service*

n Unit*

n Quantity*

n Price*

n Date*

n Estimated Time Required*

n Time Requested

n Comments*

n Agent*

n Tech

To Run:

Select **Outstanding List** and press **[Enter]**.
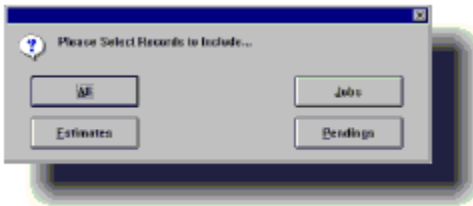
Select the required class of jobs.
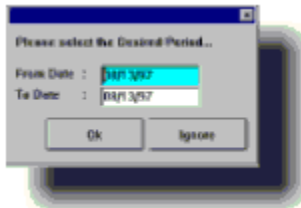
As you can see it defaults to *Yesterday's Date* (future dates are not allowed). Enter the required Date Range and Press **[Enter]**.

EXCEPTIONS & Voids

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Job #

n Company*

n Name*

n Phone*

n Street*

n City

n Zip*

n Primary Service*

n Unit*

n Quantity*

n Price*

n Date*

n Time Requested

n Tech

n Cancellation Reason

To Run:

Select **Exceptions & Voids** and press **[Enter]**.

As you can see it defaults to *Yesterday's Date*, (Future date not allowed). Type the required Date Range and Press **[Enter]**.

Unconfirmed ORDERS

Contains the following information. Those item marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Job #

n Company / Name

n Bill Phone

n Phone

n Price

n Primary Service*

To Run:

Select **Unconfirmed Orders** and press **[Enter]**.

As you can see it defaults to *Tomorrow's Date*. Enter the required Date Range and Press **[Enter]**.
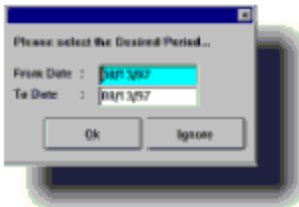
Unassigned Jobs

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Job #

n Company/Name*

n Bill Phone*

n Price

n Street*

n City

n Primary Service

n Comments*

To Run:

Select **Unassigned Jobs** and press **[Enter]**.

As you can see it defaults to *Tomorrow's Date*. Enter the required Date Range and Press **[Enter]**.

Estimated Costing Sheet

This report is available if you have the optional Job Costing Module. It contains:

n Job #

n Booking Date

n Company Name

n Client Name

n Billing Location

n Billing Phone

n Site Location

n Site Phone

n Service/Description

n Item Price

n Material Cost

n Labor Cost

n Other Cost

n Total Cost

n Totals

To Run:

Select **Estimated Costing Sheet** and press **[Enter]**.

Accounts Receivables

Contains the following information. Those items marked with an asterisk (*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Customer Name

n Customer ID #

n Invoice #*

n Job #

n Current

n 10 Days*

n 30 Days

n 60 Days

n 90 Days

n 180 or More*

n Open Balance

n Total Due

n In 10 Days*

n In 30 Days*

To Run:

Select **Accounts Receivables** and press **[Enter]**.

Select the required *filtering conditions*.

TIP If you wish to see what payments are scheduled to be made in the future, enter a negative No. of Days. For example entering -60 will give you a report on what payments that you can expect in the next *60 days, based upon information currently in your data files.*

Select the desired group.

Select the required format.

Customer History

Contains the following information. Those item marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Job #

n Order Date

n Job Date*

n Primary Service

n Tech*

n Gross income per Order

n Gross Income Total

n Paid per Order*

n Paid Totals*

n Receivables per Order

n Receivables Total

To Run:

Select **Customer History** and press **[Enter]**.
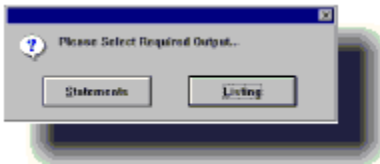
Select either **Statement** or **Listing**. Both contain similar information, only the format is different. Statements are designed for Client presentation and Listing are for your own information.
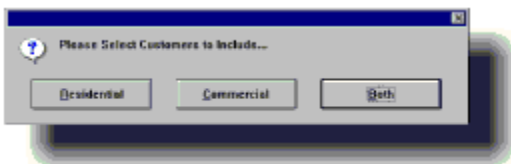
Select the required group.
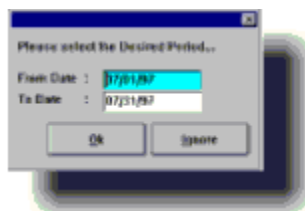
As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

Sales Analysis

These reports contain the following information broken down by Tech, and you may choose either a **Summary Report** or a **Detailed Report**. Those items marked with an asterisk(*) do not appear on the Summary Report. Both screen and printed reports are identical. Those items marked with 2 asterisks (**) will only appear if you have the optional Job Costing Module.

n Date Range of Report

n Date Report Printed

n Job #

n Item Name*

n Income*

n Quantity*

n % of Invoice

n Material**

n Labor**

n Other Cost**

n Group Count

n Report Count

Plus:

n **Report Summary** containing Income Totals and Averages, Quantity Totals and Averages, % of Invoice and Report Count.

To Run:

Select **Sales Analysis** and press **[Enter]**.
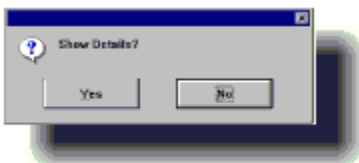
If you want just summary select NO, for full details select YES
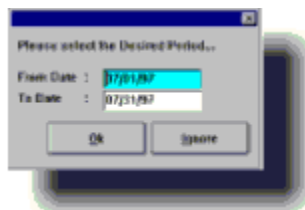
As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

Agent Commission

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Agent Name

n Order Date

n Job #

n Billed to

n Gross Booking

n Receivables

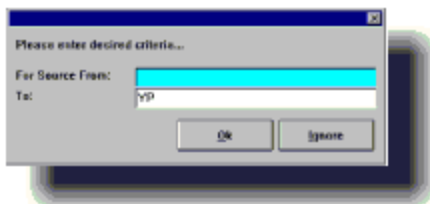n Add-ons

n Commission Rate

n Commission Amount

To Run:

Select **Agent Commission** and press **[Enter]**.
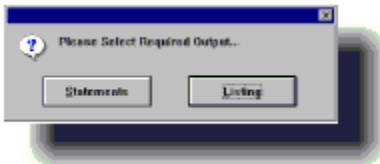
Select either **Statement** or **Listing**. Both contain similar information, only the format is different. Statements are designed for Client presentation and Listing are for your own information.
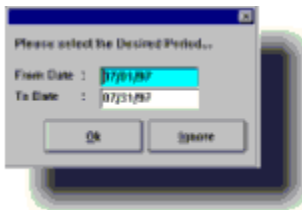
As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

These fields default to the first and last Agent name alphabetically.

Enter the required range and press **[Enter]**.

Source Commission

Contains he following information. Those item marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Source Name

n Order Date

n Job #

n Billed to
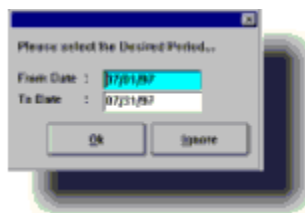
n Gross Booking*

n Receivables/Net Sales

n Add-ons*

n Commission Rate*

n Commission Amount

To Run:

Select **Source Commission** and press **[Enter]**.
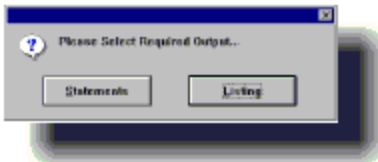
Both formats contain similar information, only the format is different. Statements are designed for presentation to your Agents, and Listing is for your own information.

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

These fields default to the first and last Source name alphabetically.

Enter the required range and press **[Enter]**.

Tech Compensation

Contains the following information. Those item marked with an asterisk (*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Tech Name

n Order Date

n Job #

n Billed to

n Net Sales

n Receivables

n Add-Ons

n Commission Rate

n Commission Amount

n Wages

To Run:

Select **Tech Compensation** and press **[Enter]**.
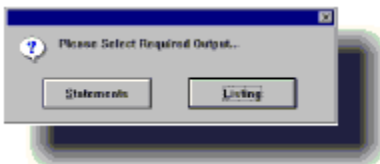
Both formats contain similar information, only the format is different. Statements are designed for presentation to your Agents, and listing is for your own information.

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**
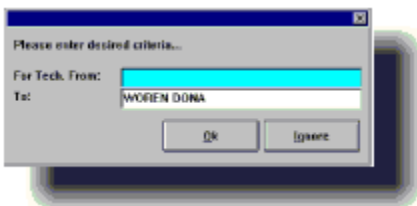
Enter the required range and press **[Enter]**.

Mailing Labels

This report provides the capability to select between rows of 1 or 3 Labels across a page. Recommended sizes for these Labels is: 1 label - 15/16 X 3 1/2,

3 labels - 15/16 X 2 5/8

Print labels that contain the following information:

n Company Name

n Name

n Street Address

n City

n State

n Zip code

To Run:

Select **Mailing Labels** an press **[Enter]**.
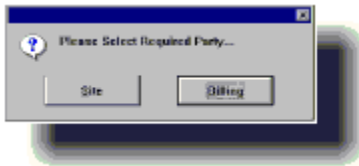
You will now be asked to select the sorting order you want the labels to be printed in, from the following list:
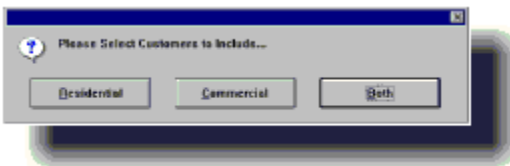
n Order No

n Last Name

n Billing Party

n Job Date

n Order Date

n Source of Jobs

n Customer Phone #

n Zip Code

n Agent Name

n Company

You may also enter **[Esc]** to select *all* records in **Order of Entry**.

If you choose any of the above fields, you will now be asked to define the range for selection, based on the key sorting field. You will then be given the option to select between 1 or 3 labels across.
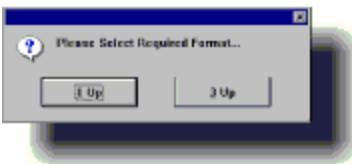
Performance Reports

The following 5 reports appear on a sub-menu which is accessed by selecting

Performance Reports and pressing **[Enter]**

Agent Performance

Source Performance

Tech Performance

Office Performance

Performance by Zip

Agent Performance

Contains the following information along with **Totals and Averages.** Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Agent Name

n Gross bookings

n Net Sales

n Add-ons

n Sales Tax*

n Receivables

n $0-50*

n $ 51+*

n $101+*

n $201+*

n $501+*

n Completed

n Cancelled

n Outstanding

n Future Jobs

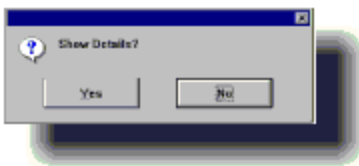**To Run:**

Select **Agent Performance** and press **[Enter]**.
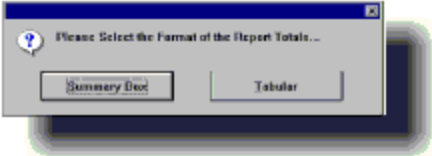
The **Tabular format** contains totals, and below them when applicable, the averages, in the following format:
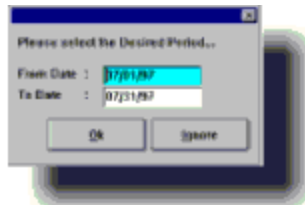
===

3572.00 5623.00 0.00

274.77 432.54 0.00

The box format being easy to read, requires no explanation. It does, however, use up more paper.

If you want just summary select NO, for full details select YES

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.
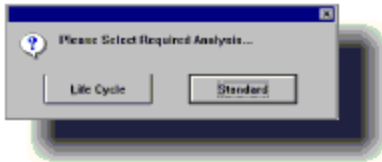

These fields default to the first and last Agent name alphabetically.

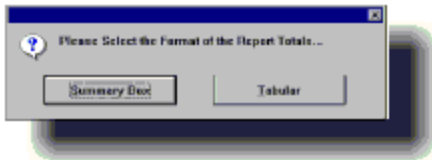Enter the required range and press **[Enter]**.

Source Performance This report is available in two flavors, **Standard** and **Life Cycle Analysis**.

To Run:

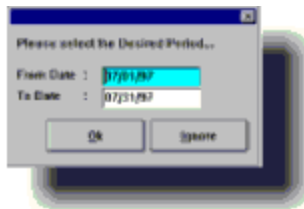Select **Source Performance** and press **[Enter]**.

The differences between these two formats are described in the field listings above.
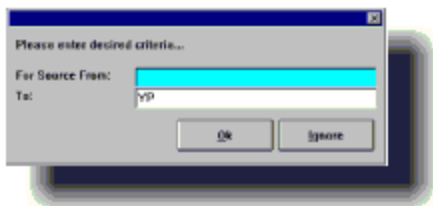

The **Tabular format** contains totals, and below them when applicable, the averages.

If you want just summary select NO, for full details select YES

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

These fields default to the first and last Source name alphabetically.

Enter the required range and press **[Enter]**.

Standard Report

Contains the following information along with **Totals and Averages**. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Source name

n Gross Bookings*

n Net Sales

n Add-Ons

n Sales Tax*

n Receivables

n $0-50*

n $ 51+*

n $101+*

n $201+*

n $501+*

n Completed

n Canceled

n Outstanding

n Future Jobs

n Date of Distribution

n Copies

n Cost

n Cost per 1000

n Response per 1000

n Lead Cost Gross

n Lead Cost Net

n Estimated Profit/Loss

Life Cycle Analysis

This report will show the varying effectiveness of your Advertising Sources over its complete life cycle, and contains the following information. Those items marked with an asterisk (*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Source Name

Then the report analyzes the following criteria:

n Calls In

n Orders $

n Income $

over the following time periods:

n Day 1*

n Day 2*

n Day 3*

n Day 4*

n Day 5*

n Day 6*

n 0-15

n 0-30

n 0-60

n 0-90

n 0-180

n 0-360*

n To Date

Tech Performance

Contains the following information along with **Totals and Averages**. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Tech Name

n Gross Booking

n Net Sales

n Add On

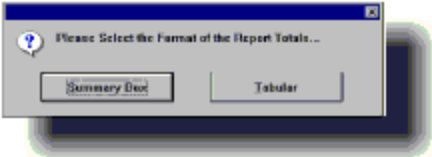n Receivables

n $0-50*

n $ 51+*

n $101+*

n $201+*

n $501+*

n Completed

n Cancelled

n Outstanding

To Run:

Select **Tech Performance** and press **[Enter]**.

The **Tabular format** contains totals, and below them when applicable, the averages, in the following format:

```
================================================
=========
```

3572.00 5623.00 0.00

274.77 432.54 0.00

The box format being easy to read, requires no explanation. It does, however, use up more paper.

If you want just summary select NO, for full details select YES

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

Enter the required range and press **[Enter]**.

Office Performance

Contains the following information along **with Totals and Averages**. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Gross Booking

n Net Sale

n Add-Ons

n Sales Tax

n Receivables

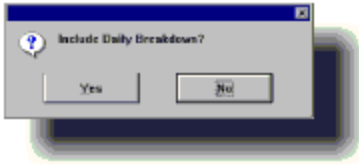n $0-50*

n $ 51+*

n $101+*
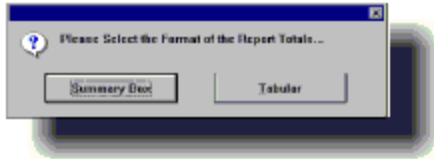
n $201+*

n $501+*

n Completed

n Canceled

n Outstanding

n Future

To Run:

Select **Office Performance** and press **[Enter]**.

Select **[Y]** for **bottom line figures** only (skipping the group totals). Select **[N]** if you want the Daily Totals too.
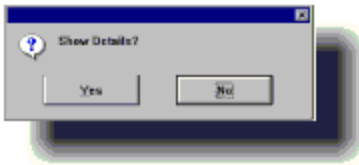

The **Tabular format** contains totals, and below them when applicable, the averages, in the following format:

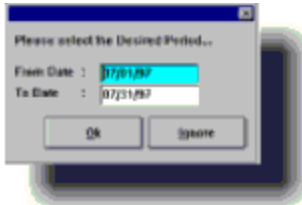===

3572.00 5623.00 0.00

274.77 432.54 0.00

The box format being easy to read, requires no explanation.
It does, however, use up more paper.

If you want just summary select NO, for full details select
YES

As you can see it defaults to the *last full month*. Enter the
required Date Range and Press **[Enter]**.

Performance by Zip

Contains the following information along with **Total and Averages**. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Gross Booking

n Net Sales

n Add-Ons

n Sales Tax

n Receivables

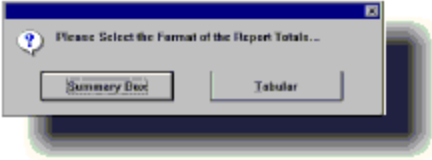n $0-50*

n $ 51+*

n $101+*

n $201+*

n $501+*

n Completed

n Canceled

n Outstanding

n Future

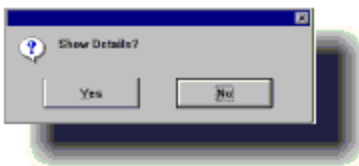**To Run:**

Select Performance by Zip and press **[Enter]**.

The **Tabular format** contains totals, and below them when applicable, the averages, in the following format:

===

3572.00 5623.00 0.00

274.77 432.54 0.00

The box format being easy to read, requires no explanation. It does, however, use up more paper.

If you want just summary select NO, for full details select YES
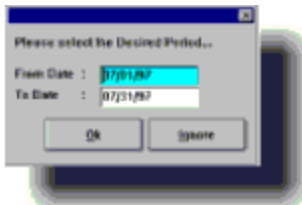
As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

These fields default to the first and last Customer Zip code numerically.

Enter the required range and press **[Enter]**.

Services & Sale Items

From the **File Menu** select **Open** then select **Services, & Sale Items**.

From the **File Menu** select **Print.**

[Items Listing by Category](#)

[Items Listing by Number](#)

[Items Listing by Name](#)

[Items to Order by Vendor](#)

Items Listing by Category

Contains the following information sorted by **Item Category**:

n Report Date

n Item ID #

n Item Name (Primary Service)

n Price

n Unit

n Time

To Run:

Select **Items Listing by Category** and press **[Enter]**.

Items Listing by Number

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Report Date

n Item ID #

n Item Name (Primary Service)

n Category*

n Price

n Unit

n Time

To Run:

Select **Items Listing by Number** and press **[Enter]**.

Items Listing by Name

contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Report Date

n Item Name

n Item ID #

n Category*

n Price

n Unit

n Time

To Run:

Select **Items Listing by Name** and press **[Enter]**.

Items to Order by Vendor

Contains the following information sorted by **Vendor** Those items marked with an asterisk (*) do NOT appear on the screen version.

n Report Date

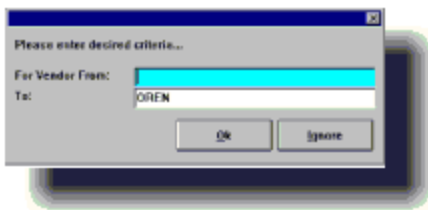n Item ID #*

n Item Name

n Category*

n Unit

n Cost*

n On Hand

n Frozen

n Quantity (to order)

n Total (cost)*

To Run:

Select **Items to Order by Vendor** and press **[Enter]**.

Please enter desired criteria...

For Vendor From:

To: OREN

Ok   Ignore

Enter the desired range (alphabetically) of Vendors, and press **[Enter]**.

Personnel (Techs & Agents)

From the **File Menu** select **Open** then select **Personnel (Techs &Agents).**

From the **File Menu** select **Print**.

[Personnel Listing](#)

[Mailing Labels](#)

Personnel Listing

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Report Date

n ID #

n Name

n Phone

n Street*

n City*

n State*

n Zip code*

n Position

n Category

n Hourly Rate

n Commission Rate

To Run: Select **Personnel Listing** and press **[Enter]**.

Sources of Advertising

From the **File Menu** select **Open** then select **Sources of Advertising**

From the **File Menu** select **Print**.

[Source Listing](#)

[Mailing Labels](#)

Source Listing

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Report Date

n ID #

n Source Name

n Phone

n Street*

n City*

n State*

n Zip code*

n Commission Rate

To Run:

Select **Sources Listing** and press **[Enter]**.

Customers & Billing Records

From the **File Menu** select **Open** then select **Customers & Billing Records**.

From the **File Menu** select **Print**.

[Customer Listing](#)

[Mail Merge](#)

[Mailing Labels](#)

[Current Calls to Make](#)

[Outstanding Calls](#)

Customer Listing

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date of Report

n Contact name

n Company

n Phone

n Street*

n City*

n State*

n Zip code*

n Last Call

n Call Notes

n Last Mail*

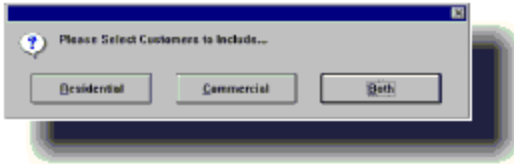n Mail Notes*

n Last Job Date

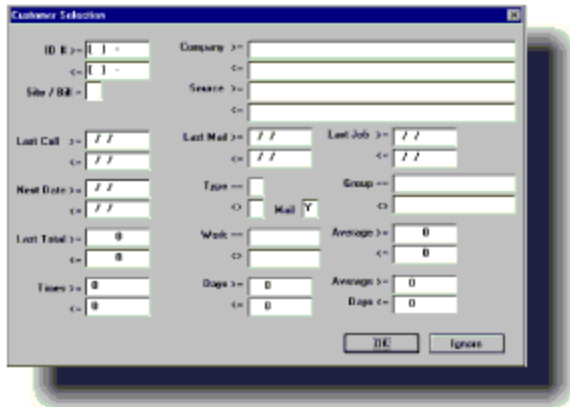n Last Job #

n Amount

n Group

n Times Serviced*

n Average $*

To Run:

Select **Customer Listing** and press **[Enter]**.

Now you will be presented with the Customer Selection Screen.

Customer Selection screen

One of the recent major additions to **ProfitMaster**, the Customer Selection Screen allows you to select information for analysis and mailing to a very fine degree using any combination of the following fields:

n ID #

n Company

n Last Call

n Last Mail

n Last Job

n Next Date

n Type

n Mail

n Group

n Last Total

n Job

n Average $$$

n Times

n Average Days

You will notice that there are some symbols by each selection criteria that look like this:

n **<=** means "*less than or equal to*"

n **>=** means "*more than or equal to*"

n **<>** means "*not equal to*" or "*different from*."

For example, suppose you want to assemble a list of Customers you had serviced in for **UPHOLSTERY CLEANING** from **01/01/93 through 03/01/93** in Zip codes **90026 through 90045,** you would do the following:

LAST JOB>= 01/01/93

LAST JOB<= 03/01/93

By doing a series of **[Enter]**s, move the cursor to

WORK = and enter **UPHOLSTERY CLEANING** or whatever Service Category you wish.

The exact *service category must be entered or* ***ProfitMaster*** *will not recognize your entry.*

With no more selections needed, press the [PgDn] key. This will take you out of the Customer Selection Screen so you may select the Zip code range.

These fields default to the first and last Customer Zip code numerically. For purposes of our example you would enter:

From: 90026

To: 90045

Enter the required range and press **[Enter]**.

Mail Merge

This **extremely powerful** feature is another major addition to **ProfitMaster**. **Mail Merge** is the *merging* of selected Customer information, like their names and addresses, with a document you that intend to *mail* to them, resulting in a personalized mailing.

Current Calls to Make

Contains the following information. Those items marked with an asterisk (*) do *not* appear on the screen version.

n Contact

n Phone

n Street*

n City*

n State*

n Zip*

n Comments

n Last Call

n Call Notes

n Last Mail*

n Mail Notes*

n Last Job Date

n Job #

n Amount

n Category

n Time*

n Average $*

To Run:

Select **Current Calls to Make** and press **[Enter]**.

As you can see it defaults to the *today's date.* Enter the required Date Range and Press **[Enter]**

These fields default to the first and last Customer Zip code numerically.

Enter the required range and press **[Enter]**.

Outstanding Calls

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Contact

n Phone

n Street*

n City*

n State*

n Zip*

n Comments

n Last Call

n Call Notes

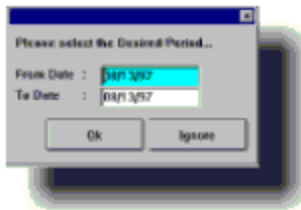n Last Mail*

n Mail Notes*

n Last Job Date

n Job #

n Amount

n Category

n Time*

n Average $*

To Run:

Select **Outstanding Calls** and press **[Enter]**.

These fields default to the first and last Customer Zip code numerically.

Enter the required range and press **[Enter]**.

Cash Register

From the **File Menu** select **Open** then select **Cash Register.**

From the File Menu select Print.

[Reprint Receipt](#)

[Print Header](#)

[Register Listing](#)

Reprint Receipt

First select the *specific* Receipt you wish to reprint

Now move to the **Reports Menu**.

To Run:

Select **Reprint Receipt** and press Enter].

Print Header

To better utilize your printer paper, **ProfitMaster** prints the header for the *subsequent* receipt after printing the *current* one. So you will have a header in the correct place, first print the header, using this feature in preparation for a receipt printing session.

To Run:

Select **Print Header** and press **[Enter]**.

Register Listing

Contains the following information, and includes **Totals and Averages**. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Receipt #

n Account #*

n Account Name*
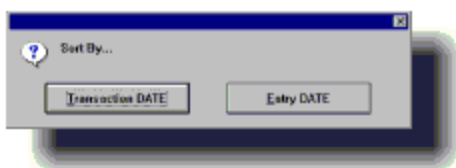
n Cash

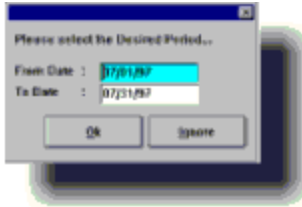n Check

n Check #*

n Charge

n Charge #*

n Total

To Run:

Select **Register Listing** and press **[Enter]**.

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

Summary Listing

Contains the daily **Total and Averages** for the :
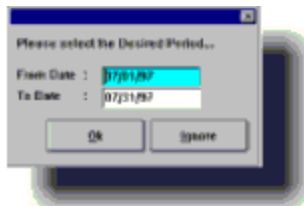
n Date Range of Report

n Cash

n Check

n Charge

n Total

To Run:

Select **Summary Listing** and press **[Enter]**.

As you can see it defaults to the *last full month*. Enter the required Date Range and Press **[Enter]**.

General Ledger

From the **File Menu** select **Open** then select **General Ledger**.

From the **File Menu** select **Print**.

[Account Statement](#)

[P&L Statement](#)

[Journal Listing](#)

[Trial Balance](#)

[Balance Sheet](#)

Account Statement

Broken down by account Name, this report contains when appropriate, the following information:

n Report Date Range

n Account #

n Account Name

n Beginning Balance

n Transaction Date

n Description

n Reference

n Debit Amount

n Credit Amount

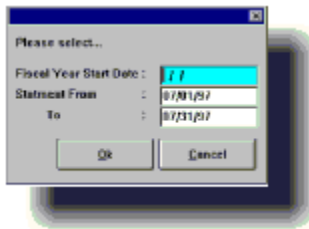n Current Balance

n Debit Total

n Credit Total

To Run:

Select **Account Statement** and press **[Enter]**.

Enter the **Fiscal Year Start Date**.

These fields default to the start and end dates of the previous month.

Select the required date range and press **[Enter]**.

These fields default to the first and last Accounts numbers.

Select the required Account range and press **[Enter]**.

P&L Statement Contains the following information broken down by **Income & Expenses**, including **Group Totals**.

n Report Date Range

n Account #

n Account Name

n Beginning Balance

n Debit Amount*

n Credit Amount*

n Period Balance

n Percentage of the Group Total (if selected) n Year to Date Amount n Percentage of the Group Total (if selected) **NOTE** As the **ProfitMaster** allows you to report on any date range period, instead of just the more common "accounting month" period, we have included the **Period Balance** column. This replaces the *Month to Date* column found in the more traditional accounting systems.

To Run:

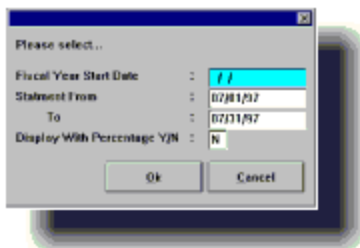Select **P&L Statement** and press **[Enter]**.

Enter the **Fiscal Year Start Date**.

These fields default to the start and end dates of the previous month.

Select the required date range and press **[Enter]**.

Display With Percentage Y/N

press **[Y]** or **[N]**

Journal Listing

Contains the following information broken down by Journal #, including **Totals** and **Averages**.

n Report Date

n Account #

n Transaction Date

n Description

n Debit Amount*

n Credit Amount*

n Current Balance

To Run:

Select **Journal Listing** and press **[Enter]**.
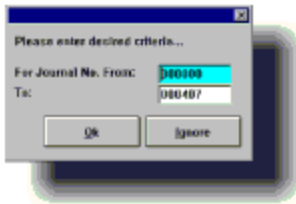
These fields default to the first and last Journal Number.

Select the required Journal Number range and press **[Enter]**.

Trial Balance

Contains the following information, with Totals where appropriate.

n Report Date Range

n Account #

n Account Name

n Account Type

n Beginning Balance

n Debit Amount

n Credit Amount

n Current Balance

To Run:

Select **Trial Balance** and press **[Enter]**.

Enter the **Fiscal Year Start Date**.
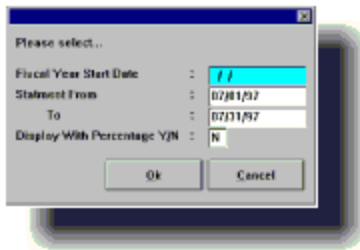
These fields default to the start and end dates of the previous month.

Select the required date range and press **[Enter]**.

These fields default to the first and last Accounts numbers. Select the required Account range and press **[Enter]**.

Balance Sheet

Contains the following information broken by **Assets & Liabilities**.

n Report Date Range

n Account #

n Account Name

n Beginning Balance

n Debit Amount*

n Credit Amount*

n Period Balance

n Year to Date

To Run:

Select **Balance Sheet** and press **[Enter]**.

Enter the **Fiscal Year Start Date**.
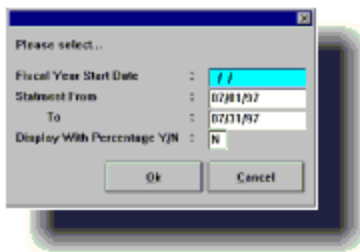
These fields default to the start and end dates of the previous month.

Select the required date range and press **[Enter]**.

Chart of Accounts

From the **File Menu** select **Open** then select **Chart of Accounts**

From the **File Menu** select **Print**.

[Accounts by Number](#)

[Accounts by Name](#)

[Account Listing by Type](#)

Accounts by No.

Contains the following information, and include **Totals**.

n Report Date

n Acct. #

n Account Name

n Type

n Balance

Accounts by Name

Contains the following information, and includes **Totals**.
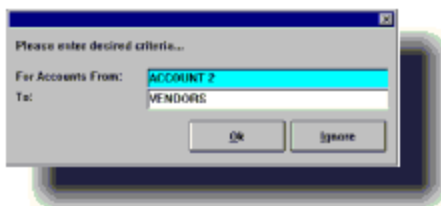
n Report Date

n Account Name

n Account Number

n Type

n Balance

Account Listing by Type

Contains the following information, and includes **Totals**.

n Report Date

n Account Type

n Account Name

n Account Number

n Balance

To Run:

Simply select the report you wish to run.

ProfitMaster Frequently Asked Questions

[How do I Install ProfitMaster?](#)

[How do I start ProfitMaster in Windows 95?](#)

[How do I start ProfitMaster in Windows 3.1?](#)

[How do I start ProfitMaster in DOS?](#)

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[How to Input A Job to A Past Date](#)

Personnel File - Techs. & Agents

This is where you enter details on all the employees/subcontractors working in your company including compensation information.
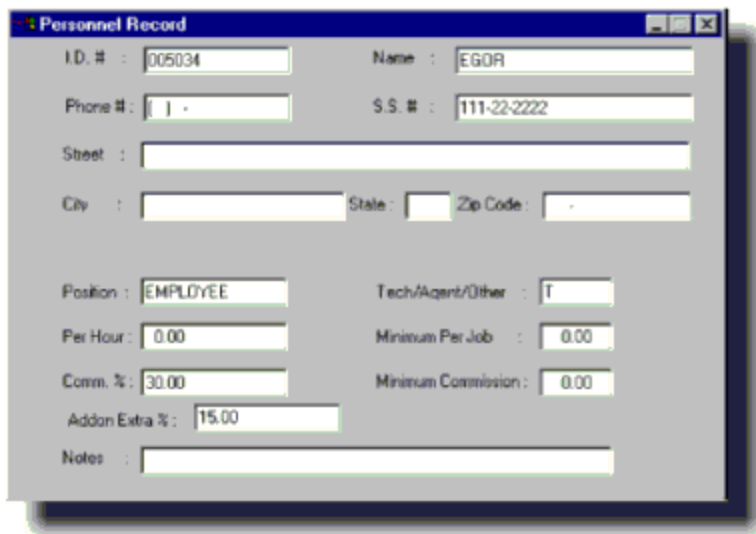
From the **File Menu** select **Open** then select **Personnel (Techs & Agent)** option.

Add New Record

Using your Mouse or the **Left** [ç], and **Right Arrows**[è] move to the **Edit Menu.** From the **Edit Menu** choose **Add New Record.**

ÿYou can click the Personnel (Tech's & Agents) icon instead of using the File->Open->Personel (Tech's & Agents) command.

You will now be presented with a blank Personnel Record Form to fill in. Each record in the Personnel File contains the following information:

Id # ProfitMaster, will automatically assign the employee Id # for every new employee entered. This is a **read only** field and cannot be modified.

Name The Employee Name

Phone The employee telephone number

Social Security The employee Social Security number

Street The street address and Apartment number

City The city

State The state

Zip The zip code

Position The position the employee holds.

Tech/Agent/Other Every employee must be classified, as **Technician**, **Booking Agent**, or **Other**.

Valid entries therefore are only **"T"**, **"A"**, or **"O"**.

NOTE If an employee acts as both Booking Agent and Technician, you must create two records, one for each function.

Per Hour If the employee is a Technician, you can set the **ProfitMaster** to automatically calculate wages due based on the rate entered in this field. This field is used to automatically calculate wages for each Invoice.

Minimum Per Job If an amount is entered here, it will ensure any wage amount earned for a job will not fall below this figure.

Comm % If the employee is a Booking Agent, or Technician, you can set the **ProfitMaster** to automatically calculate commissions due based on the figure entered in this field. You will be able to adjust this figure or the automatically calculated commission amount at time of Invoice.

Minimum Commission If an amount is entered here, it will ensure any commission calculated for a job will not fall below this figure.

Add On % If your Technician gets a percentage of Add On sales you can have **ProfitMaster** automatically calculate the amount by inputting the percentage here.

NOTES Any further information you may wish to add.

After all settings are as you want, press **[PageDown]** or press **[Enter]** to save. You will see the following message:

If you have not changed your mind, since entering the information, you should press **[Y]** or **[Enter]**. If you have changed our mind, use your **Right Arrow[è]** to select **[N]**, then Press **[Enter]**, or Press **[N]** and the settings will remain the same as they were before you entered this screen. Otherwise choose **[Cancel]** to return to the previous screen in the data entry mode.

After saving the new record, you will be presented with another blank Screen Form. You can now enter another Employee Record or press **[Esc]** to end the data entry session and return to the Edit Menu.

Mailing Labels

To Run:

Select **Mailing Labels** and press **[Enter]**.
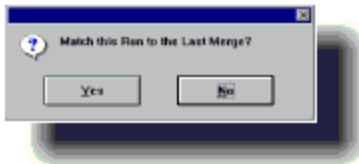
To produce Mailing Labels for the same Customers you last printed a letter for, select "Y" and then you will be prompted for the label configuration (1 or 3 across):
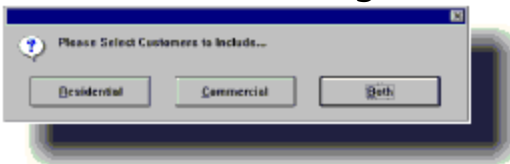
<u>For Exported Records [Y/N]</u>

Press **[N]** to perform a new selection from the *Customer Selection Screen*

End of Day/INV. REGISTER

Contains the following information. Those items marked with an asterisk(*) do NOT appear on the screen version.

n Date Range of Report

n Date Report Printed

n Job #

n Company/Name*

n Phone*

n Gross Bookings

n Gross Income

n Sales Tax*

n Paid*

n Receivables*

n Tech1

n Add-ons

Plus

n **Report Summary** which includes Totals and Averages for Gross Bookings, Gross Income, Sales Tax, Paid, Receivables, Add-ons and report Count.

To Run:

Select End of Day/Inv. Register Report and press **[Enter]**.
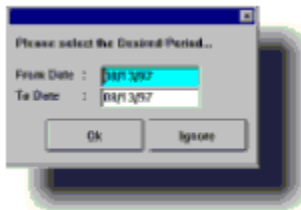
As you can see it defaults to *Yesterday's Date*, (Future date not allowed). Type the required Date Range and Press **[Enter]**.

Mailing Labels

This report provides the capability to select between rows of 1 or 3 Labels across a page. Recommended sizes for these Labels is: 1 label - 15/16 X 3 1/2,

3 labels - 15/16 X 2 5/8

Print labels that contain the following information:

n Employee Name

n Street Address
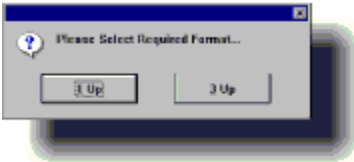
n City

n State

n Zip code

To Run:

Select **Mailing Labels** and press **[Enter]**.

Mailing Labels

This report provides the capability to select between rows of 1 or 3 labels across a page. Recommended sizes for these Labels is: 1 label - 15/16 X 3 1/2,

3 labels - 15/16 X 2 5/8

Print labels which contain the following information:

n Source Name

n **Attn.: Contact Name**

n Street

n City

n State

n Zip code

To Run:

Select **Mailing labels** and press **[Enter]**

General Ledger This file has the following screen forms: **n Automatic Balancing**

n Journal

Automatic Balancing

Quick double entry screen *debiting* the **Primary Accoun**t while *crediting* the **Offset Account**.

Journal

Allows entering multiple debits and credits, and is the equivalent of the standard written journal.

NOTE Please consult your accountant or bookkeeper before using these forms.

How do I Install ProfitMaster?

To install ProfitMaster please insert **Disk 1** into youre A: drive and...

Windows 3.1 In **Program Manager** click **Run** (**File** menu). At the prompt type: **A:SETUP** and press [Enter]. Go to step #3. Follow the On-Screen instructions to complete your installation. To start **ProfitMaster:** Double click on the **ProfitMaster** in the **ProfitMaster! Applications** group.

Windows 95 Click the Windows **Start** button. Click **Run**. At the prompt type: **A:Setup** and press [Enter]. Follow the On-Screen instructions to complete your installation. To start **ProfitMaster:** Click the Windows **Start** button, Click **Programs,** click **PTS-Profit! Applications,** click **ProfitMaster**.

DOS At the DOS Prompt **(C:\>)**, type **A:SETUP.** Press [Enter]. Follow the On-Screen instructions to complete your installation. To start **ProfitMaster:** At the DOS Prompt type: **CD\Master.** Press [Enter]. Now type: **Master** and press [Enter].

At the **PTS-Profit** sign on screen, type **SUPERVISOR** in the **User Name field**, and press the [Enter] key twice to gain access.

How do I start ProfitMaster in Windows 95?

To start ProfitMaster in Windows 95 click the Windows **Start** button. Click **Programs**. Click **PTS Profit Applications**. Click **ProfitMaster.**

How do I start ProfitMaster in Windows 3.1?

To start **ProfitMaster** in Windows 3.1 Double click on the **ProfitMaster** icon in the **PTS Profit! Applications** group.

How do I start ProfitMaster in DOS?

At the DOS prompt, C:\>, type *cd\master* [Enter]. Then type *master* [Enter].

How do I make a Shortcut to ProfitMaster in Windows 95?

Place your Mouse cursor on the Windows Desktop. Click your *right* mouse button once. A menu appears. Click **New**, click **Shortcut**. In the Shortcut Wizard Command line type: For DOS version: C:\Master\master.exe

For Windows version: C:\Master\profit.exe Click Next. In the **Select a name for the shortcut** type: For DOS version: ProfitMaster for DOS. Click **Next** For Windows version: ProfitMaster for Windows. Click **Finish** For DOS, select an Icon for the new shortcut and click **Finish.**

Why doesnt my Print Reports option work?

If ProfitMaster does not allow you to use the Print Reports option, exit the program. Start the program again and at the **User Sign on screen** use **Supervisor** as your user name. The program should now allow you to print reports.

How do I print Reports in ProfitMaster v 5.5?

In ProfitMaster v 5.5 the reports have been moved to the **Print** option. To print reports click **Print** (**File** menu) or in Windows, click the Printer icon. This will bring up a list of Report options.

How do I install the Tutorial Video?

To install the video please insert **Disk 1** into your A: drive and...

Windows 3.1In Program Manager **click** Run **(**File **menu). At the command line type:** A:SETUP **and press [ENTER]. Follow the On-Screen instructions to complete the installation. To start the tutorial: Double click on the** CM-Tutor **in the** PTS Profit! Applications **group.**

Windows 95 Click the Windows **Start** button. Click **Run.** At the prompt type: **A:Setup** and press [Enter]. Follow the On-Screen instructions to complete the installation. To start the tutorial: Click the Windows **Start** button, click **Programs,** click **PTS Profit! Applications**, click **CM-Tutor**.

You can use the on screen controls to PAUSE, STOP and PLAY the video at will.

How do I apply a Discount in ProfitMaster?

To apply a Discount in ProfitMaster you must first set up the discount as an item in your **Services & Sales Items.** Select **Open (File** menu). Select **Services & Sales Items.** Select **Add New Records (Edit** menu). In the Item Name type in the type of Discount you want, i.e. Senior Discount. Skip down to Item Price and enter the amount of the discount as a negative number. For example: a 10% discount should be entered as 10.00. In the Type field enter : %. Save the record.

You can now use this discount as a service item in the service item area of your work order. Makes sure to enter the discount as the last service item so it will apply to the whole job.

Why arent my commission percentages calculating properly from my work orders?

There are 2 criteria upon which commissions are calculated. One is the percentage the technician, agent or source is allotted. This is done in the Commission field in their Personnel record. The other is done in the Sales & Service Item section. Make sure that each of your commissioned sales or service items has a Y in the commission field of its record.

How do I get back a deleted Invoice?

Select **Include Deletions (View** menu). Search for the Invoice you want, then select **Undelete the Current Record (Edit** menu) to restore the record.

What happens if I Pack Files in the Utilities Menu?

The Pack Files option permanently deletes any Deleted record from the Carpet Master program. Think twice before using this option.

Why does the Help List come up when Im entering a Service Item I know is in my Sales & Service Items Database?

Carpet Masters memory feature automatically fills in Sales & Service Items on your work order based on the first few letters you enter. This saves time and keystrokes. The memory feature works by comparing the letters you type into the service section of the work order with known items in the Sales & Service Items Database. However, if the first few letters match more then one Sales or Service Item, Carpet Master brings up the Auto-Help list so that you can select the proper item. For Example: if someone enters Stair Cleaning as STAI on the work order and the Sales & Services Database contains both Stair Cleaning and Stain Removal the Auto-Help list will appear displaying both items so that the proper one can be selected.

Why do I have two Invoice #s for the same work order?

Whenever you choose to edit an Invoice, Carpet Master automatically Voids the current Invoice and creates a new one to be edited. The new Invoice retains the same invoice number as the old one since you are not creating a new a new invoice, merely creating a copy of the voided Invoice for editing.

Why is it that after I enter a payment into the cash register for a certain account #, I loose a previously entered payment?

It is important that when you enter a new payment using the cash register you use **Add New Record (Edit** menu) for the entry. If you search for a previous record and then use **Edit the Current Record (Edit** menu) to enter the new information, you will overwrite an existing entry. Thus, you would be replacing the old record when you really wanted to ad a new record.

How to Input A Job to A Past Date

In order to input a job to a previous date you must check to see if the Check Dates option in ProfitMaster is activated. To do this, from the **Utilities** menu choose **Preferences** and then **Personal**.

Midway down in the right hand column there is an option called Check Dates. Make sure it is not check marked.

If you had to make a change in your Personal Preferences make sure you save the changes.

Now when entering an order ProfitMaster will ignore the date and allow you to enter past jobs.

You may reactivate the Check Dates option when you are done. It is an important tool, which helps to prevent scheduling of a future job to a past date.

How to Quickly Enter a Past Date in the Calendar Schedule

If you are entering past jobs into ProfitMaster you may find it a little tricky to find the past date in the Calendar portion of the Work Order. To quickly force the Calendar to a past date follow these steps.

1) Enter the name of the Calendar in the Crew/Route field and press the TAB key. This will bring the Calendar screen up.

2) Leave the cursor on whichever day and time it is on and press ENTER. This will close the Calendar and place the cursor in the Best Time field.

3) Hold down the SHIFT key and while holding it down press the TAB key once. This will move the cursor backwards to the Date field.

4) Enter the date you want to book the job on in the following format: mm/dd/yy or 01/20/97.

This will bring the Calendar screen back up, but now it will show the date range you just specified. Choose the date and time you want and continue filling out the work order.

How to charge a tech for a redo

In the Orders, Estimates and Invoices screen add a new record.

Fill out the Work Order with the appropriate information but if you input items in the service description area be sure to overwrite any prices to $0, otherwise there will be a balance overdue for a job that has already been paid.

When you get to the 2nd page of the Work Order use the first Tech line for the technician who is going to perform the redo. Indicate his pay in the appropriate field.

On the next Tech line input the technician that originally performed the job. In the payment field indicate the amount of money you would like to deduct from his pay buy entering a minus dollar amount.

When you are prompted to save the job save it as a Redo.

How do the notes in customer order and customer billing records differ?

In the Orders, Estimates & Invoices notes, which can be activated by pressing the F4 key on your keyboard or the Vertical Toolbar on your screen, is dedicated to one specific record or Invoice. For example Mrs. Jones may have two different Invoices with different notes attached to each one of them.

In Customer and Billing records, one file will always have the same notes attached to it. A good way to use this feature is use it to gather personal information about the customer such as birthdays etc. You can later use this information to send cards to you customers on their special day with a nice birthday offer.

How to avoid mark as invoiced messages when booking same day jobs?

In order to avoid getting the "Mark as Invoiced" message when entering new orders, or to allow only certain people in your office to close jobs, you can limit your ProfitMaster's user privileges.

To do this, click on the **Utility** menu and then choose **Preferences** then **Security**.

To take away the privilege to create Invoices, go to the User record you wish to modify and then choose Edit the Current Record from the Edit Menu. In the section titled Invoices, uncheck the box by Create Invoices.

By doing this the user will not be able to convert a Work Order into an Invoice.

Conversely, you should have at least one user or User Logon name with the ability to create invoices so that you can close jobs and apply payments.

In the service description box, how do I create a an additional service line within two existing lines?

Place your cursor in the service line that you wish to add a line above.

Press [CTRL] & [ENTER] at the same time. This will push the line you started in down and enter a new service line above it.

In the service description box, how do I delete a service line?

To delete a service description line, place your cursor in the service line that you wish to delete and

Press [CTRL] & [BACKSPACE] at the same time.

Why doesnt my Print Reports option work?

If ProfitMaster does not allow you to use the Print Reports option, exit the program. Start the program again and at the **User Sign on screen** use **Supervisor** or any other name that you have previously specified to have report printing ability in their security record in the User name. The program should now allow you to print reports.

How do I print Reports in ProfitMaster v 5.5?

In ProfitMaster v 5.5 the reports are under the **File** menu, **Print** option. To print reports click **Print (File** menu) or in Windows, click the Printer icon. This will bring up a list of Report options.