Questimates

Version 2.5.3

SUPER USERS MANUAL

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OVERVIEW

This manual builds on the user manuals and explains the extra-options which are available by use of special passwords to the superusers.
All options mentioned in here except the first three screens of the client-exporting are only available to invoicing-users.

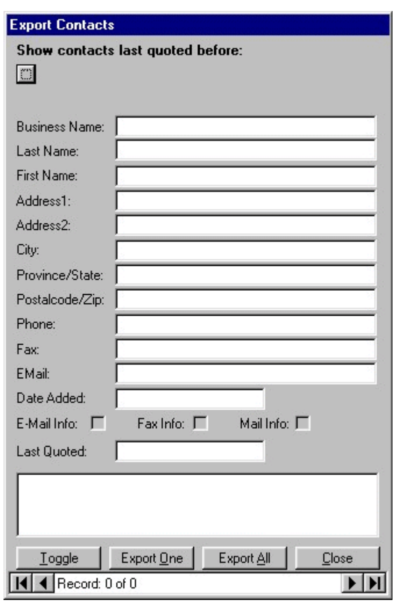
MENU ITEMS

SYSTEM

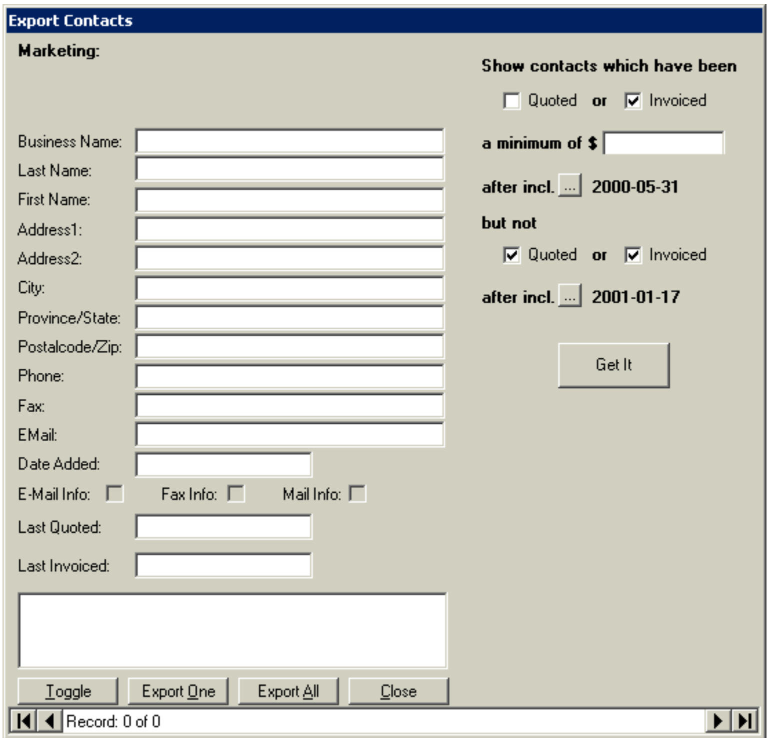
Export Contacts
Exporting contacts requires a password.

Allows you to export your client information.
The information can be exported in dBase IV format. An ACT!-mapping file is being provided to facilitate the import into Act! (see Installation chapter of the administrator manual)
You can also export addresses to a Tab-delimited text-file.

Toggle
Allows you to toggle between these options:
- Show contacts whose last activity was before (defaults to 180 days back) - choose the date by clicking the little box located in the top left corner of the screen
- Show contacts added after (defaults to 365 days back) - choose the date by clicking the little box located in the top left corner of the screen
- Search for (select the search options in the drop down menu on the right hand side of the window and input keywords. Press "ENTER" to start the search.) You can toggle between several screens for the export of clients.
- Marketing export (the ultimate in selection)



After choosing the required clients, you have the option to either "Export All" (exporting all clients chosen) or "Export One" (exporting on the currently visible client). You can scroll through the records using the Record Scroll bar located at the bottom the screen.



The main purpose of this 4th screen is to select clients for which you have done work in the past, but not lately, so that you can contact them and get more business from them.
By checkmarking Quoted and Invoiced, you can generate different possibilities, which combined with the minimum-box and the date-selectors give you a great selection tool for your marketing.
You can choose to export a single selected contact or all contacts which have been found.
You will save the contacts as a dBase IV file, which can be opened in programs like Access, Paradox, Quattro Pro and Excel to refine your selection and then used for data-merge printing.

Import Data into Act!

After saving your exported data, open ACT!. Open either an existing database or create a new one.

Select File, Dataexchange, Import. A Wizard will pop up guiding you through the steps of importing.

Select Filetype: Dbase III - V, Filename and location: browse for the file you just exported from Questimates. Click Next.

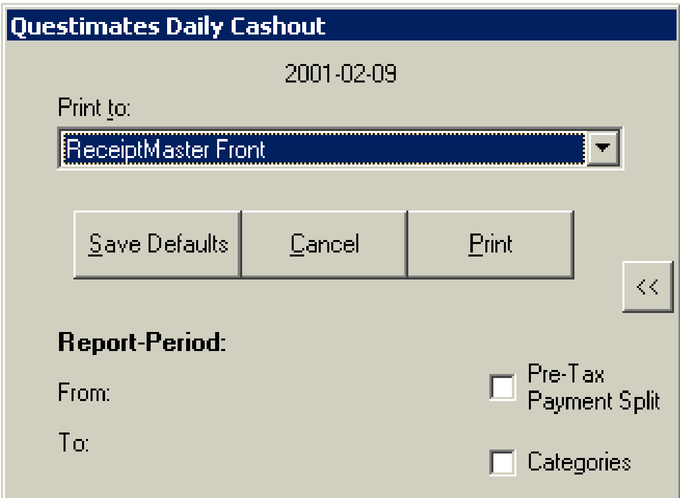
Choose to import “Contact Records”. Click Next.

Choose to use “Predefined Map” and select “Questimates” from the list below.

Click Finish and ACT! will now merge the exported contacts in your database.

REPORTS

Daily Cash
By clicking on the “>>” button on the Daily Cash form and entering your password, you can open an advanced screen.



By clicking on the labels “From” and “To”, you can select the period to print the totals for.
The most common application is to print a month-end report of sales.
When you also check the Categories, you will see a summary of the charges to each module in the selected period.
For users wishing to track their sales by the way they were paid, but need the pre-tax amounts, this option is also available.

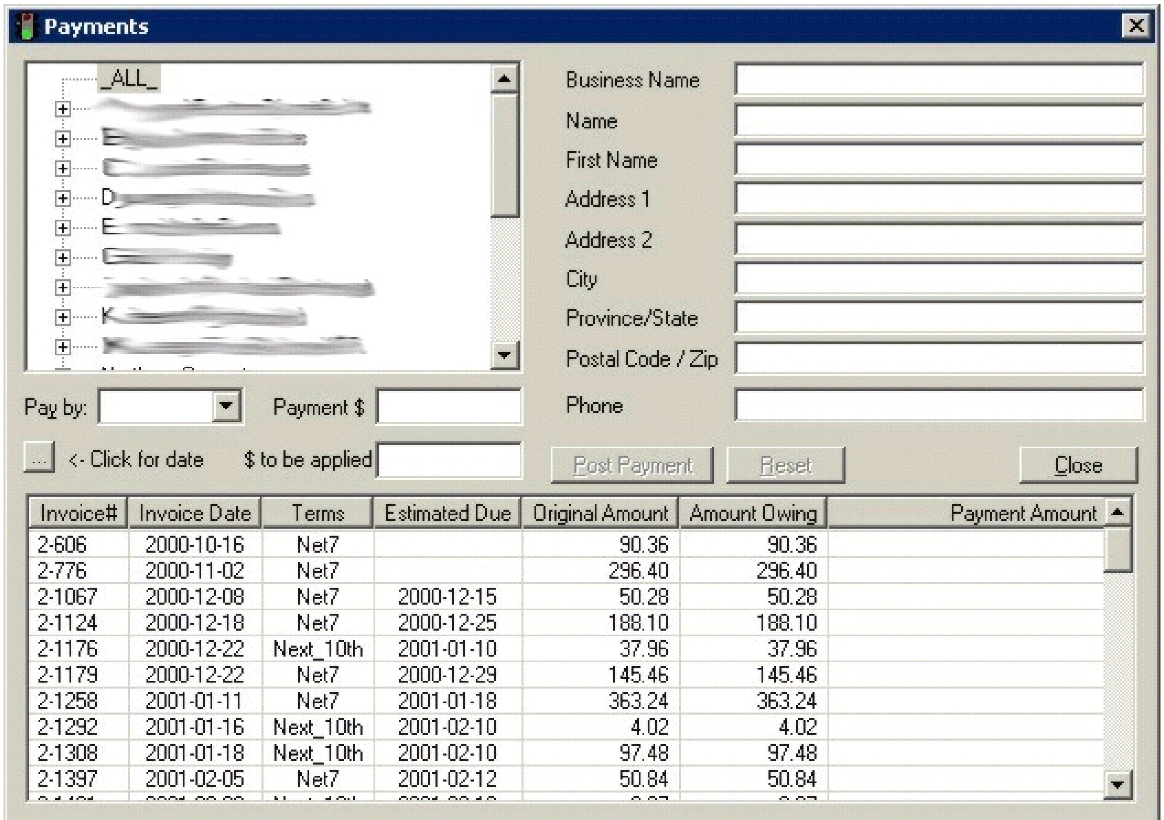
Daily Invoice Payments
By clicking on the “>>” button on the Daily Invoice payments form and entering your password, you can open an advanced screen similar to the one in Daily Cash, but without the two checkboxes.
By clicking on the labels “From” and “To”, you can select the period to print the totals for.
The most common application is to print at month-end the total invoice-payments recorded.

Payments
This item lets you print reports of all the payments in a specific period, showing each paid invoice.

Receivables
By selecting receivables from the menu and entering your password, you can print a list of outstanding invoices with a total at the end.
Great for follow-up calls or a month-end report when printed on the last day of the month at night or in the morning of the first.

INVOICES

Record Payments



In the top left you select the clients for the invoices to show. You have three levels: All, Company, Contact. You can select an item by clicking on it, and expand a company by clicking on the + on the left of it.
On the top right it will display the contact-information for the selected invoice or contact.
Select how the payment was done at "Pay by" (it offers the same options as for receipts).
Enter the dollar-value at "Payment $" (overpayments are not supported)
Click on the button under the "Pay by" to select the payment-date.
$ to be applied will show you how much of the entered payment can still be applied for other invoices.
Post Payment: Click here to apply the selected payments. Only works of course when "$ to be applied" is 0.
Reset: Reset selected invoices for payment and start over.
Close: Close module
The bottom invoice-box gives you the following options:

- Click a header to sort ascending/descending
- Double-Click a line to apply/reset payment. If only partial payment is possible due to insufficient payment it will be partially applied.

Set Void Status

You can set the VOID-status of any invoice/receipt. For items dated other than today you have to supply the password.
Please note that this will reflect in all reports you will print, even if you re-print Daily Cash from this previous day.

FOR TECHNICAL SUPPORT
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