

Consultant Front Office Version 11

User Manual



Consultant Front Office Version 11

Direct selling magic from a mouse!

by MLM Software Solutions, Inc.

This User Manual is a compilation of all of the Help topics built into your Consultant Front Office program. The information contained in this manual can also be accessed using the Help (question mark) icons on each screen of the program or by clicking on the Help Topics option on the Help menu in the program.

We hope you enjoy your software!

Consultant Front Office Version 11

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Special thanks to:

All of our clients for their valuable feedback over the last 15 years. Their input has been instrumental in the writing of this manual and in making Consultant Front Office the premier system available for managing your direct selling business.

Table of Contents

Foreword	11
Part I Program Installation	13
1 Introduction.....	13
2 License Agreement.....	14
3 System Requirements.....	15
4 Installation and Startup.....	15
5 Operating the Demo Version.....	17
6 Business Setup.....	18
7 Reinstalling the Software.....	25
Part II Good Things to Know	27
1 Viruses and Hard Drive Problems.....	27
2 Program Updates.....	27
3 Program Customization.....	28
4 Backing Up Your Data.....	28
5 Transferring Data Between Computers.....	29
6 Merging Data Between Two Computers.....	29
7 What To Do If Your Spouse Is Also A Consultant.....	32
8 Networked Computers.....	33
Part III Getting Started	35
1 How To Get Started.....	35
2 IRS Small Business Resources.....	37
3 Using Help.....	38
Part IV Home	40
1 Overview - Home.....	40
2 Quotes.....	41
Part V Contact Management	44
1 Overview	44
2 Contacts.....	44
Overview	44
View Options	45
Contacts Top Toolbar	50
Contacts Bottom Toolbar	51
Creating Contact Groups	52
Entering Contacts	54
Entering Your Team	58

Selecting a Contact	59
Editing a Contact	60
Deleting a Contact	60
Filtering Contacts	61
Searching Contacts	63
Selecting Contacts	64
Incremental Filtering and Searching	65
Making Group Changes	65
Email Setup	69
Email	74
Letters	83
Mailing Labels	84
Custom Labels	87
Custom Contact Fields	89
Follow-Up Schedules	89
Creating Schedules	89
Recurring Emails	91
Auto Dialing	93
Contact Notes	95
Contact Profiles	96
Ranking Contacts	97
Contact Status	98
Follow-up	99
Event History	99
Importing Contacts	100
Exporting Contacts	103
3 Calendar.....	104
Overview	104
View Options	104
Creating an Appointment	108
Editing an Appointment	109
Deleting an Appointment	110
Filtering Appointments	111
Printing Appointments	111
Printing a Monthly Calendar	112
Linking Appointments to a Contact	113
Pop-Up Reminder	113
4 Tasks.....	114
Overview	114
View Options	115
Creating a Task	117
Editing a Task	118
Deleting a Task	118
Filtering and Sorting Tasks	119
Printing a Task	119
Linking Tasks to a Contact	120
5 Memos.....	121
Overview	121
Creating a Memo	121
Editing a Memo	122
Deleting a Memo	123
Filtering Memos	123
Printing a Memo	123

6 Team.....	124
Overview	124
Views	124
Team Selecting	127
Team Adding, Deleting and Editing	127
Team Filtering	128
Team Options	129
Team Printing	130

Part VI Financial Management 132

1 Overview.....	132
2 Setup.....	133
Setting Freight Rates	133
Setting Tax Rates	134
Products	136
Product Bundles	138
Current Time Period	139
3 Events.....	140
Overview	140
Adding an Event	141
Editing or Deleting an Event	142
Viewing Your Event Referral Network	143
4 Goals.....	145
Overview	145
5 Income and Expenses.....	147
Overview	147
Entering Income and Expenses	148
Editing Income and Expense Entries	149
Deleting Income and Expense Entries	150
Travel, Meals and Entertainment	150
Importing Income and Expense Data	151
6 Sales.....	151
Overview	151
Settings	152
Entering Sales	154
Overview.....	154
Invoice No.....	156
Customer.....	156
Comment.....	157
Event	157
Payment Method.....	158
Inside Order.....	158
Potential Host.....	158
Booked Event.....	158
Potential Recruit.....	158
Host Order.....	158
Reorder	159
Commission Only	159
Selecting Products.....	159
Group	159
Item No.	160

Unit Price	160
Dis and Tax	160
Del	160
Setting Freight Rates	161
Setting Tax Rates	162
Payment History	164
Receivables	164
Editing Sales	165
Deleting Sales	166
Invoices	166
Discountability and Taxability	169
Uploading Payments To ProPay	170
Receivables	172
7 Purchases.....	172
Overview	172
Entering Purchases	173
Overview	173
Vendor	175
Event	175
Payment Method	175
Editing Purchases	176
Deleting Purchases	177
8 Personal Use and Samples.....	177
Personal Use	177
Samples	178
9 Loans and Trades.....	179
Loaned Products	179
Borrowed Products	179
Product Trades	180
10 Accounts.....	181
Cash Account	181
Checking Account	182
Credit Account	183
Reconciling an Account	184
11 Vehicles.....	186
Overview	186
Entering Vehicle Information	187
Editing or Deleting Vehicle Information	189
Importing Mileage Records	190
12 Home Office.....	191
Overview	191
Entering Home Office Information	192
Editing or Deleting Home Office Information	194
13 Taxes.....	195
Overview	195
Inventory and Cost of Goods Sold (Full-Inventory)	197
Printing Tax Reports	197
Obtaining a Free Tax Preparation Price Quote	197
Exporting Data to TurboTax or TaxCut	198
14 Miscellaneous.....	198
Drop Ships	198

Free Products	198
Obsolete Products	199
Product Exchanges	199
Product Returns	199

Part VII Reports 201

1 Printed Reports.....	201
2 Report Options.....	203
3 Filtering Reports.....	204
4 Sorting Reports.....	206
5 Custom Contact Reports.....	207
6 Profit Loss Report.....	208
7 Balance Sheet Report.....	208
8 Income Tax Report.....	209
9 Sales Tax Report.....	210
10 Event and Host Summary Reports.....	211
11 Monthly Summary Report.....	212
12 Yearly Summary Report.....	213

Part VIII Menu Bar 215

1 File	215
New Business	215
Change Business	215
Rename Business	215
Backup	215
Restore	216
Verify Backup	217
Auto Backup Path	217
Import - Contacts	217
Import - Schedules	218
Import - Content	218
Import - Transactions	218
Export - Contacts	220
Export - Schedules	220
Export - Email List	220
Export - iCentris	220
Update Custom	221
Data Merge - Import	221
Data Merge - Export	221
Data Exchange - Import	221
Data Exchange - Summary	224
Delete - Business	224
Delete - Contacts	225
Delete - Calendar	225
Delete - Memos	225
Delete - Tasks	225
Archive Data	225
Exit	226

2	Categories.....	226
	Income	226
	Expenses	227
	Products	228
	Events	228
	Contacts	229
	Calendar / Tasks	230
	Memos	231
3	Settings.....	231
	Password	231
	Owner Information	231
	Preferences	232
4	Accounts.....	236
	Cash	236
	Checking	236
	Credit Card	237
5	Samples.....	238
	Summary	238
	Edit	238
	Withdrawals	239
6	Personal Use.....	240
	Summary	240
	Edit	240
	Withdrawals	241
7	Loans.....	242
	Summary	242
	Edit	242
	Borrow	243
	Loans	244
8	Trades.....	245
	Summary	245
	Edit	246
	Record	246
9	Help.....	247
	Setup Wizard	247
	ReadMe File	248
	Help Topics	248
	Training	248
	Support	248
	Release Notes	248
	Updates	249
	Updates Link	249
	Ordering Info OR Program Comparison	249
	Purchase OR Upgrade	250
	Palm Sync Install	251
	Palm Sync Logfile	251
	About	251

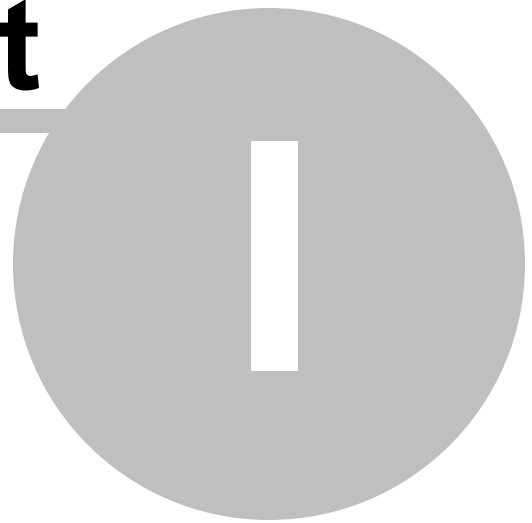
Part IX Palm Synchronization

254

1	Synchronization Overview.....	254
----------	--------------------------------------	------------

2	Installing the Palm Sync Module	254
3	Synchronizing.....	255
4	Synchronization - Restrictions.....	255
5	Synchronizing - Special Considerations.....	256
6	Synchronization - Troubleshooting.....	258
7	Synchronization Resetting.....	258
8	Uninstalling the Palm Sync Module.....	259
Part X Troubleshooting		261
1	Using Help.....	261
2	Training.....	261
3	Technical Support.....	261
Part XI Purchasing and Upgrading		263
1	Feature Comparison.....	263
2	Purchasing a License.....	263
Index		265

Part



Program Installation

1 Program Installation

1.1 Introduction

Welcome to Consultant Front Office, the revolutionary software for building and organizing your direct sales business. It combines state-of-the-art technologies for strengthening customer follow-up, with streamlined financial recordkeeping and tax preparation, all tailored specifically to the direct selling business model. Whether you're tracking customers, or crunching tax forms, this program will save you time and make you money - we guarantee it.

The pictures contained in this User Guide generally reflect the Professional Edition of the program. If you have either the Basic or Standard Edition, some of the features you see in these pictures may not appear in your program. Whenever possible, the applicability of different features to the different editions of the program is stated in the accompanying text.

☐ Main Toolbar

The main navigation toolbar in the program contains the following buttons:

- Home
- Contacts
- Calendar (Standard and Professional Editions only)
- Tasks (Standard and Professional Editions only)
- Team (Standard and Professional Editions only)
- Goals (Professional Editions only)
- Income and Expenses
- Sales
- Purchases
- Vehicles (Standard and Professional Editions only)
- Home Office (Professional Editions only)
- Taxes
- Reports

These buttons are used to move between the different program modules. All of the financial functions should be thought of *from your personal perspective*, so that

- **Sales = Your Sales** (use this screen when you sell to one of your customers)
- **Purchases = Your Purchases** (use this screen when you purchase from your company)

☐ Using "Help"

You can learn a lot about the program using the extensive built-in Help files. Keep in mind that you can get "context-sensitive" Help on many specific items while the program is running, simply by clicking on the **Help** buttons  found throughout the program.

☐ Training

We offer video tutorials as well as free teleconference and webinar trainings. Click on the [Training](#) option on the **Help** menu to see all of our training options.

☐ Technical Support

We have an extensive online Knowledgebase and a ticket support system that allows you to view all of your previous tickets and our responses. Click on the [Support](#) option on the **Help** menu to access our online Support Center.

Thanks!

MLM Software Solutions Inc. thanks you for your support and wishes you incredible success in your business.

1.2 License Agreement

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- by your spouse
- by your employees
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1.3 System Requirements

- Windows 98 or higher (Windows XP or higher recommended - the software is fully compatible with Windows Vista and Windows 7)
- Pentium 133 / AMD K-6 or higher (Pentium III or higher recommended)
- 100 MB of hard drive space
- 512 MB of RAM (1024 MB recommended)
- 1024 x 768 screen resolution or higher
- [Email](#) requires Internet Explorer 6.0 or higher

1.4 Installation and Startup

The software can usually be installed by simply inserting the CD into your CD drive and then following

the on-screen prompts. In general, it is recommended that you accept the default installation settings, unless you are an advanced user. For Windows 2000 and Windows XP installations it is highly recommended that the program be installed using an account which has *administrative privileges*. Administrative privileges are required when installing on Windows Vista, Windows 7 (or higher).

BASIC INSTALLATION

To install the program using an installation CD just do the following.

1. Close down all applications that are currently open on your computer. These applications generally have icons in the system tray next to the Windows **Start** button. Simply select each icon one at a time, save your work, and then close the application.
2. Insert the **Consultant Front Office** CD into your computer's CD drive. The installation program should start automatically. If it does not, click on the Windows **Start** button and then on **Run**. Use the **Browse** button to locate the file "Setup.exe" on the CD then click on **OK**.
3. Once the installation process is complete, use the Desktop icon or the **Consultant Front Office 10.0** option on the **Start** button **Programs** menu to start the program.

UPGRADING FROM AN EARLIER VERSION

To upgrade from an earlier version of the software follow the steps shown above under BASIC INSTALLATION. It is not necessary for the earlier version to be installed on the computer where you are installing the upgrade. If an earlier version is present when the upgrade is installed, all of your data will be copied into the newer program and will be present the first time you open it. If the earlier version is not installed on the same computer where you are installing the upgrade, use the **Backup** and **Restore** functions on the **File** menu ([Backing Up Your Data](#)) to bring your data into the new installation.

Once you have opened the new program and confirmed that your data was properly transferred, you should *delete the icon on your Windows Desktop that was used to open the older version*, if it was not deleted automatically during the upgrade process. This will ensure that you don't accidentally go into the older program and make additional entries. If you choose, you can use Windows Add/Remove programs to remove the older version from your computer. Removing a previous version can sometimes remove system files that are needed by the newer version as well. If this happens, you will generally encounter an Error 339 message when trying to start the program. In this event, just reinstall the newer version using your installation CD to restore the missing files. Reinstalling the program will not harm your data and will ensure that all of the files needed by the program are correctly installed and registered.

WHAT TO DO IF... THE PROGRAM EXTENDS BEYOND THE EDGE OF THE SCREEN

Consultant Front Office requires a minimum screen resolution of 1024 x 768. **If the program is not completely visible on the screen** when running, first try double clicking on the border at the top to "maximize" the program so that it fills your entire screen. If it is still not completely visible then do the following:

1. Place your mouse over a spot on your Windows Desktop where there are no program icons and right click.
2. Left click on Properties to open the Display Properties window.
3. Click on the Settings tab in the Display Properties window.
4. Look near the bottom of the Display Properties window for either "Screen Area" or "Screen Resolution". If this setting says "640 x 480" or "800 x 600", move the slider to the right until

it says "1024 x 768" or higher.

5. Click on OK to save this change.
6. Windows will then ask you to confirm that you want to keep this setting. Click on Yes and wait while your screen finishes adjusting to the new setting.

▣ WHAT TO DO IF... THE PROGRAM APPEARS FUZZY AND THE TEXT IS HARD TO READ

1. Place your mouse over a spot on your Windows Desktop where there are no program icons and right click.
2. Left click on Properties to open the Display Properties window.
3. Click on the Settings tab in the Display Properties window.
4. Look near the bottom of the Display Properties window for either "Colors" or "Color quality". If this setting says "256 colors" or "Medium (16 bit)" change it to "High color (16 bit)" or "Highest (32 bit)".
5. Click on the **Advanced** button and make sure that your font size is set to "96 dpi".
6. Click on OK (twice) to save any changes.

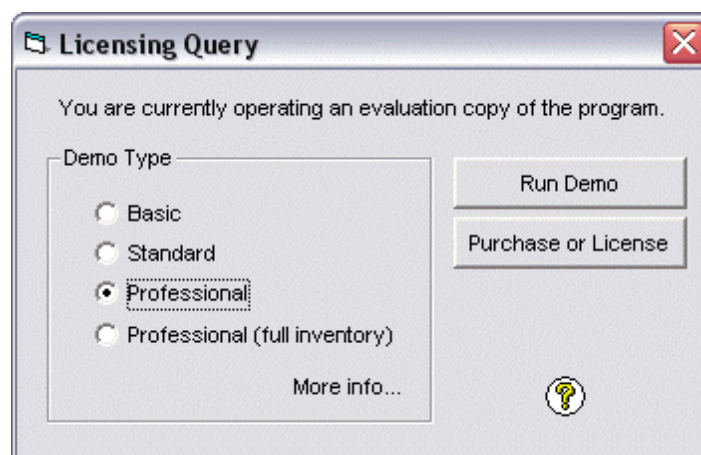
▣ HOW TO... ELIMINATE A "READ-ONLY" WARNING ON WINDOWS XP

The software is designed to offer "read-only" status to additional users if the program's database is already in use in a [networked setting](#), however, if you have Windows XP and get this warning every time you try to start the program, check the following setting:

1. Right click on the icon you use to start the program.
2. Left click on **Properties**.
3. Left click on the **Shortcut** tab.
4. Left click on **Advanced**.
5. Un-check the box that reads **Run with different credentials**.
6. Click on **OK** to save the change.

1.5 Operating the Demo Version

If you are operating the demo version of the program, you will be presented with the following choices each time you start the program:



Run Demo

Click on this button to run whichever **Demo Type** you have selected in the **Demo Type** portion of the **Program Licensing** window. Selecting different Demo Type options allows you to compare the capabilities of the different editions of the program. Click on the "More info..." link to view a feature-by-feature comparison of the different program editions.

All demo programs are limited to 25 entries of each type (e.g. Contacts, Income / Expenses, Sales etc.). Any entries made in the demo program can be saved if you later choose to purchase the software.

Purchase or License

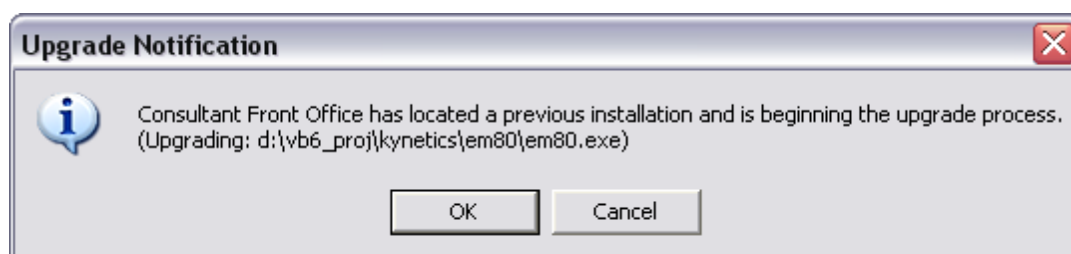
Click on this button to display the [Program Licensing](#) window with links to our online ordering and Key Code request pages.

1.6 Business Setup

The first time you start the program after installing you will be presented with some or all of the following windows. Whether or not these windows are displayed depends on how you are installing the software (CD vs download) and the presence of company-specific information.

Upgrade Notification

This box is only displayed if there is an earlier version of the program installed on your computer. Click **OK** to import the earlier version's data or **Cancel** to proceed with a "clean" installation.



Company-Specific Importing

Select the name of the company you distribute products for then click on **OK** to import product and business information. If your company's name is not listed put a check in the "My company is not listed here" checkbox and click on **OK**. To temporarily skip this option click on **Cancel**.

This option will continue to appear each time you start the program until you import a company's information, check the "My company is not listed here" checkbox and click on **OK**, or manually enter one or more products into the program. You can verify that company-specific importing was successful by checking for your company's name next to the "Custom Edition"

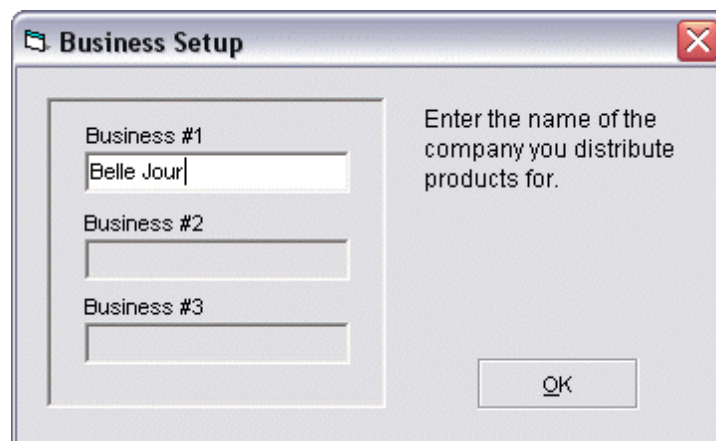
entry in the **About** option on the **Help** menu.



Business Setup

Enter the name of the company you distribute products for then click on **Done**. If you are installing from a CD containing company-specific business information, this box should already contain the name of the company you distribute products for.

This entry can be changed from within the program using the **Rename Business** option on the **File** menu. The program can keep records for up to three different companies. To start a new "business" once your first business is set up, use the **New Business** option on the **File** menu.

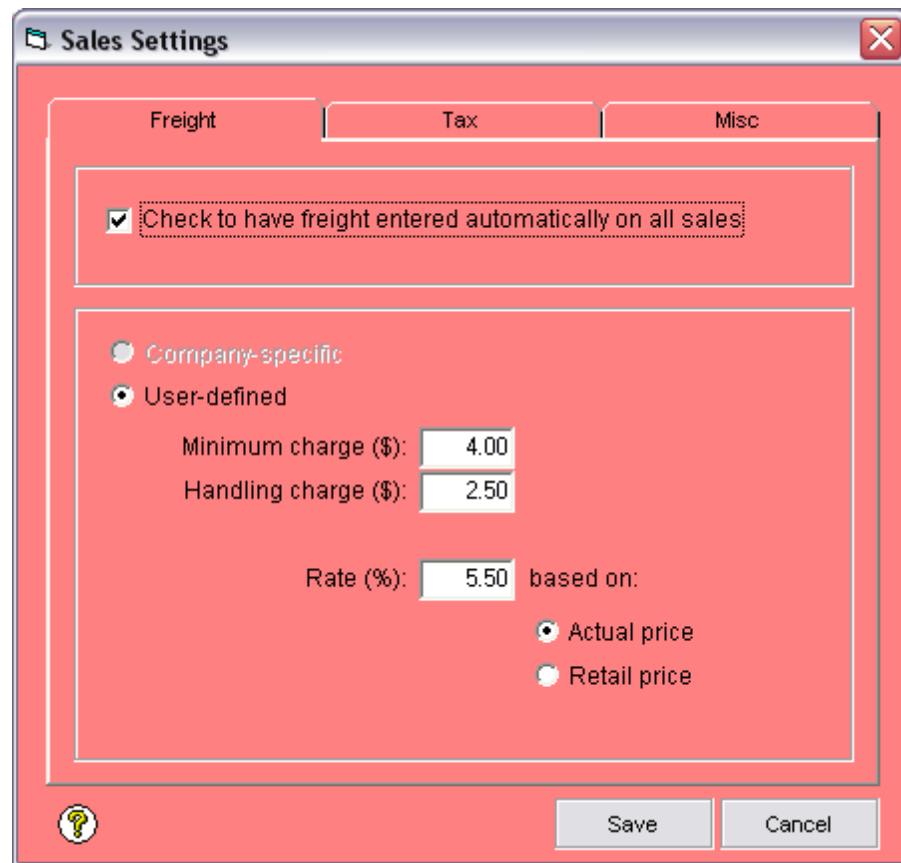


Setup Wizard

The Setup Wizard assists you in setting your freight, tax and preference settings and in entering your personal contact information. The wizard can be rerun at any time by clicking on the **Setup Wizard** option on the **Help** menu.

Freight and Tax

For more information on freight and tax settings see your "ReadMe" file (if one is available) or use the **Help** button in the [Sales Settings](#) window.



The image shows a 'Sales Settings' dialog box with a red border and a standard Windows-style title bar. It contains three tabs: 'Freight', 'Tax', and 'Misc'. The 'Freight' tab is selected. Inside the 'Freight' tab, there is a checked checkbox labeled 'Check to have freight entered automatically on all sales'. Below this, there are two radio buttons: 'Company-specific' (unselected) and 'User-defined' (selected). Under the 'User-defined' option, there are three input fields: 'Minimum charge (\$)' with the value '4.00', 'Handling charge (\$)' with the value '2.50', and 'Rate (%)' with the value '5.50'. To the right of the 'Rate (%)' field is the text 'based on:'. Below this text are two radio buttons: 'Actual price' (selected) and 'Retail price' (unselected). At the bottom left of the dialog is a help icon (a question mark inside a circle). At the bottom right are 'Save' and 'Cancel' buttons.

Sales Settings

Freight Tax Misc

☒ Check to have freight entered automatically on all sales

☐ Company-specific

☒ User-defined

Minimum charge (\$): 4.00

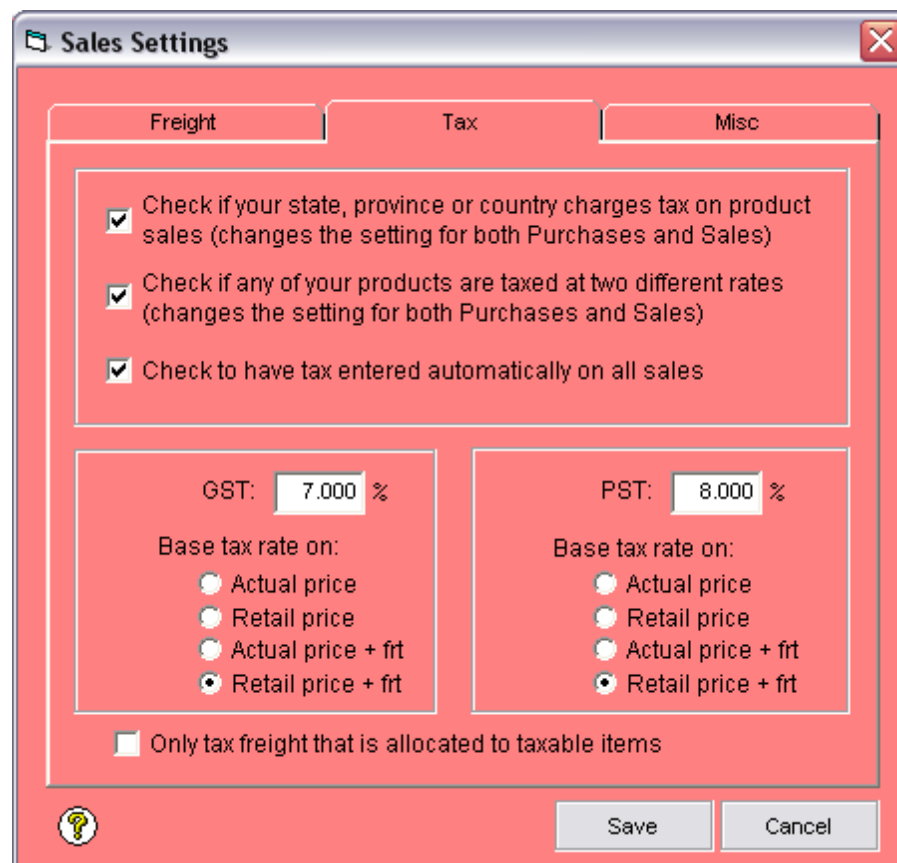
Handling charge (\$): 2.50

Rate (%): 5.50 based on:

☒ Actual price

☐ Retail price

Save Cancel



The image shows a 'Sales Settings' dialog box with a 'Tax' tab selected. The dialog has three tabs: 'Freight', 'Tax', and 'Misc'. The 'Tax' tab contains three checked checkboxes: 'Check if your state, province or country charges tax on product sales (changes the setting for both Purchases and Sales)', 'Check if any of your products are taxed at two different rates (changes the setting for both Purchases and Sales)', and 'Check to have tax entered automatically on all sales'. Below these are two sections for tax rates. The 'GST' section shows a rate of 7.000% and the 'PST' section shows a rate of 8.000%. Each section has a 'Base tax rate on:' label followed by four radio button options: 'Actual price', 'Retail price', 'Actual price + frt', and 'Retail price + frt'. In both sections, 'Retail price + frt' is selected. At the bottom of the dialog is a checkbox labeled 'Only tax freight that is allocated to taxable items', which is currently unchecked. There are also 'Save' and 'Cancel' buttons at the bottom right, and a help icon (question mark in a circle) at the bottom left.

Sales Settings

Freight Tax Misc

☒ Check if your state, province or country charges tax on product sales (changes the setting for both Purchases and Sales)

☒ Check if any of your products are taxed at two different rates (changes the setting for both Purchases and Sales)

☒ Check to have tax entered automatically on all sales

GST: 7.000 %

Base tax rate on:

☐ Actual price

☐ Retail price

☐ Actual price + frt

☒ Retail price + frt

PST: 8.000 %

Base tax rate on:

☐ Actual price

☐ Retail price

☐ Actual price + frt

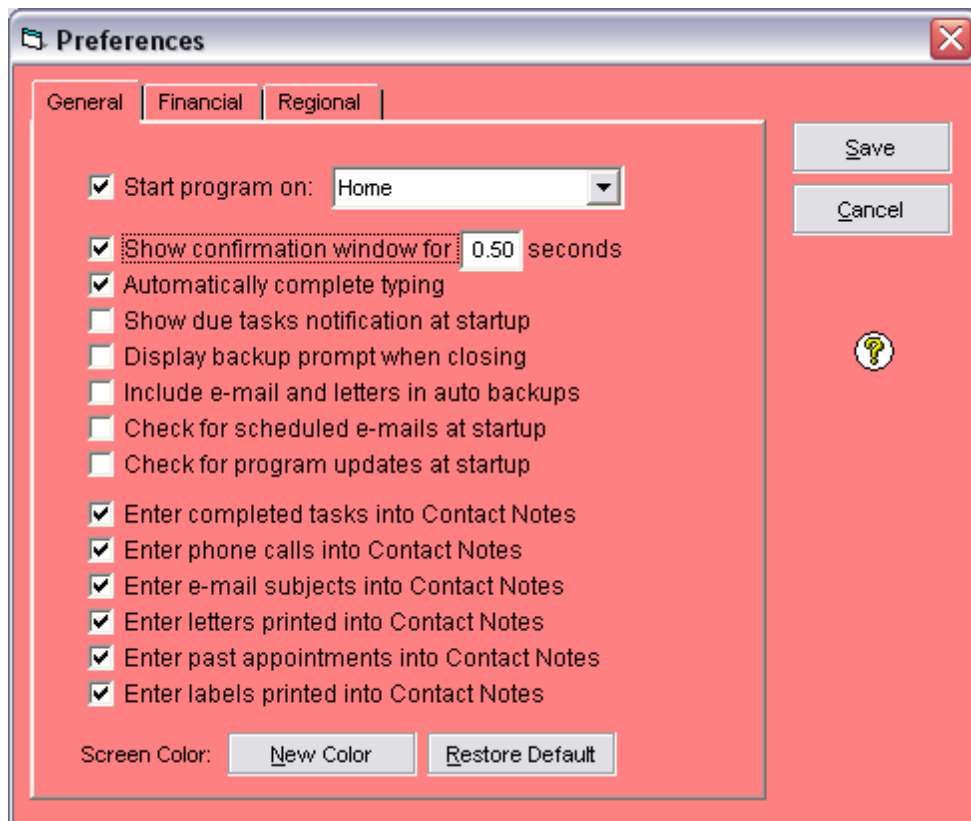
☒ Retail price + frt

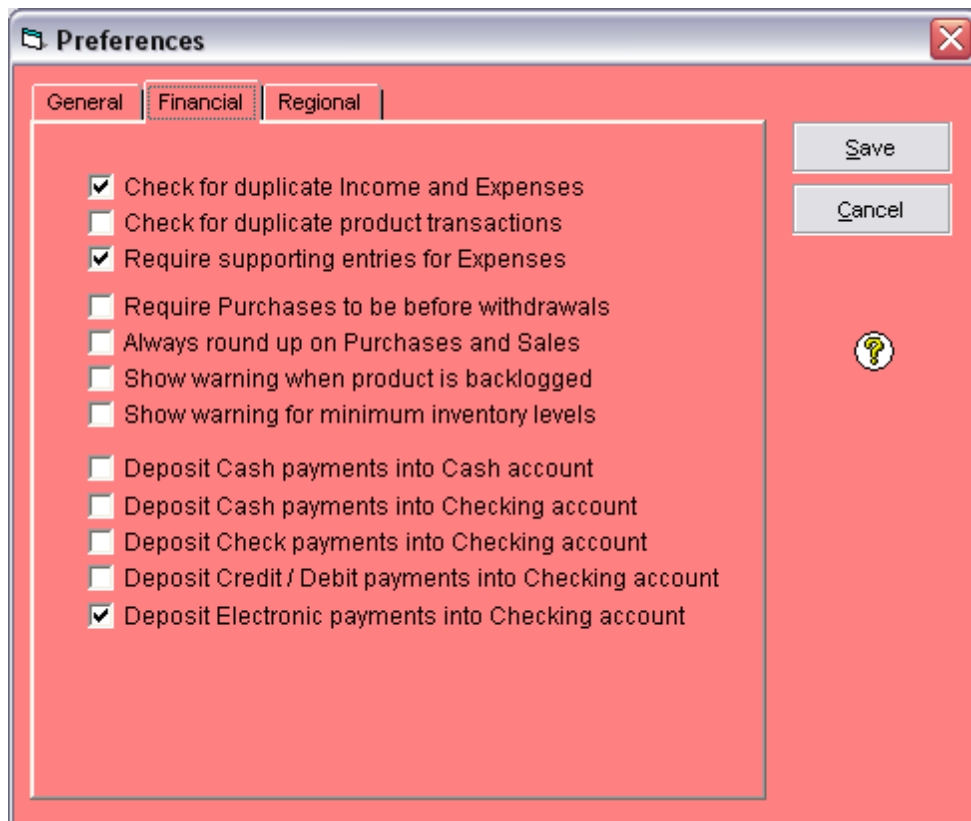
☐ Only tax freight that is allocated to taxable items

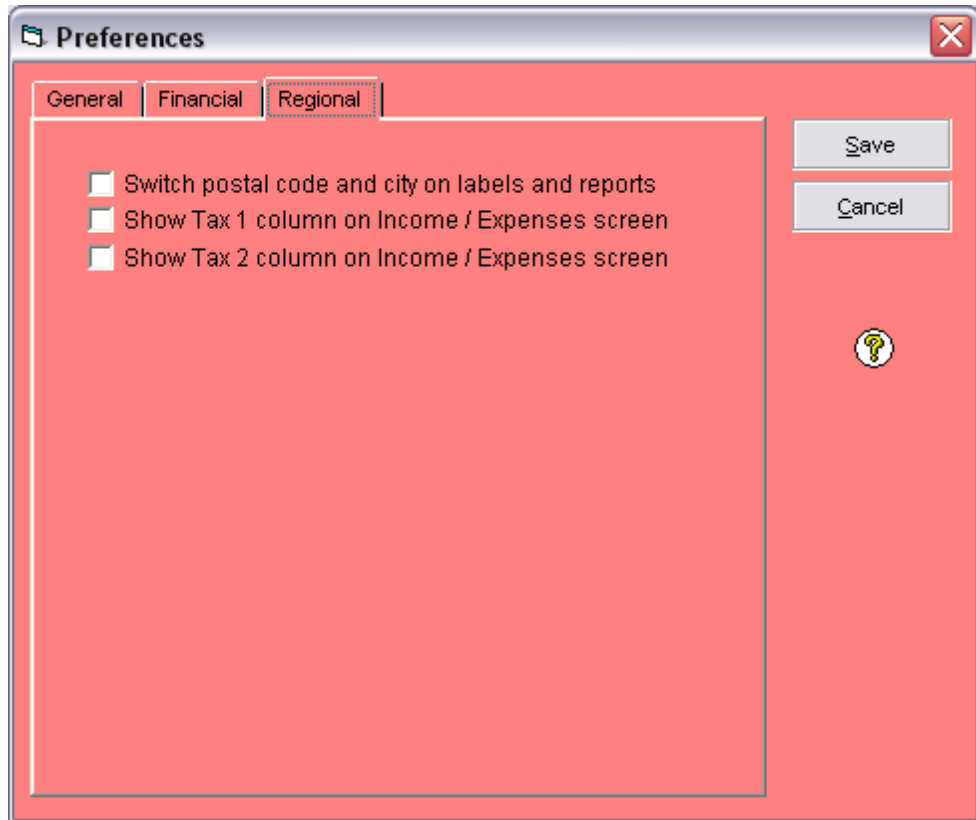
Save Cancel

Program Preferences

Select from the program's various preference options. For more information use the **Help** button in the [Preferences](#) window.

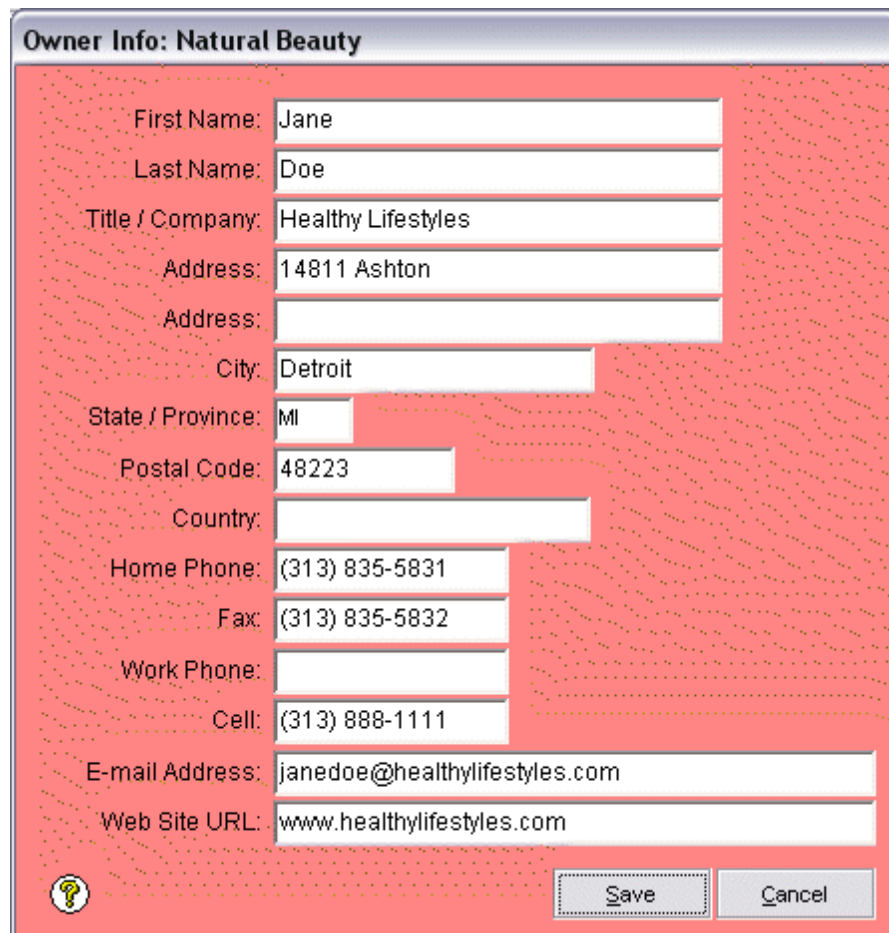






Owner Information

Enter your personal contact information. This program is not transmitted to MLM Software Solutions but is used throughout the program and particularly when creating invoices (see also [Owner Information](#)).



The image shows a software installation window titled "Owner Info: Natural Beauty". It contains a form with the following fields and values:

Field	Value
First Name:	Jane
Last Name:	Doe
Title / Company:	Healthy Lifestyles
Address:	14811 Ashton
Address:	
City:	Detroit
State / Province:	MI
Postal Code:	48223
Country:	
Home Phone:	(313) 835-5831
Fax:	(313) 835-5832
Work Phone:	
Cell:	(313) 888-1111
E-mail Address:	janedoe@healthylifestyles.com
Web Site URL:	www.healthylifestyles.com

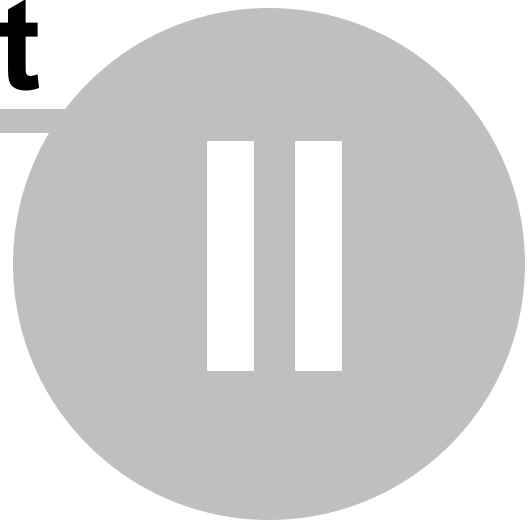
At the bottom left is a help icon (a question mark inside a circle). At the bottom right are two buttons: "Save" and "Cancel".

1.7 Reinstalling the Software

Installing or uninstalling another Windows program from your computer can sometimes inadvertently disturb a file that is required for **Consultant Front Office** to function properly. If you encounter **Error 339** at program startup, saying that one or more files are "Missing or incorrectly registered", try reinstalling **Consultant Front Office** using your installation CD. Reinstalling the program will not disturb your data and should replace and re-register any missing file(s). You will also need to reinstall the software if you upgrade from Windows 98 or ME to Windows XP and encounter an **Error 7 – Memory conflict** problem.

In some cases users who have encountered **Error 372** while trying to run the program have been able to correct the problem by reinstalling the program and then rebooting their computer.

Part



Good Things to Know

2 Good Things to Know

2.1 Viruses and Hard Drive Problems

If your computer catches a virus, has hard-drive problems, or has a software malfunction that cannot be corrected, it is likely that you will be told to reformat your hard drive and reinstall Windows. **Before reformatting your hard drive and before you send it back to the manufacturer for repairs, follow these instructions to make sure your data will be intact once you get your computer problems resolved:**

If your computer can still be started and if you can still get into **Consultant Front Office**, open the program and perform a backup ([Backup](#) option on the **File** menu) onto a USB memory stick, or back up to your hard drive and then copy the backup file onto a CD. For added protection when using a CD, or if **Consultant Front Office** can no longer be started, make a copy of the entire folder where the program is installed. The default installation folder for the program is:

Default installation folder: C:\Program Files\CFO11.or C:\Program Files (x86)\CFO11

If your computer can no longer be started, locate a computer specialist in your area who knows how to extract data from a hard drive, *even if the hard drive is damaged or corrupted*. This process may cost you \$100 or so but will save you much more than that in lost information and time. **Have the specialist extract the entire folder where the program is installed, which is typically: C:\Program Files\CFO11.** This will give you access to all of the program's automatic backup files, any of which can be used to restore your data onto a new or rebuilt computer. Automatic backup files created by the program are stored in the following directory:

Automatic backup files: C:\Program Files\CFO11\Backup Auto.or C:\Program Files (x86)\CFO11\Backup Auto

Following these steps could well mean the difference between having all of your data and having to re-enter all of your data. We have had several instances where hard drives were reformatted before the owner realized that they had not gotten everything they needed off of it. Once the hard drive has been reformatted, there is nothing we can do to help you if you do not have a valid backup file or a copy of the folder in which the program is installed.

If you know that you will need to reformat your hard drive or send your computer back to the manufacturer for repairs, please contact us first so we can help make sure you have what you need before the drive gets reformatted. The best way to contact us is by clicking on the [Support](#) option on the **Help** menu and submitting a support request ticket.

2.2 Program Updates

Program updates for each major version are available free of charge via the **Updates** option on the **Help** menu. If this option does not work for you try using the **Updates Link** option on the **Help** menu instead. To view a list of what was changed in a program update click on the **Release Notes** option on the **Help** menu.

If you would like the program to automatically check for updates each time it's started, click on the **Preferences** option on the **Settings** menu, and check the box that reads "Check for program updates at startup".

You can determine exactly what version of the program you have installed by clicking on the **About** option on the **Help** menu.

2.3 Program Customization

The program offers a number of customization options.

- Most of the drop-down selection boxes in the program can be modified using the various options on the **Categories** menu.
- User-preferences can be specified using the [Preferences](#) option on the **Settings** menu.
- "Grid" displays throughout the program, where data is presented in a table or tabular format, can be sorted simply by clicking on a column heading in the display. Column sizes can be adjusted by hovering over a column heading border until a split arrow cursor appears, then holding your mouse button down and dragging the column to the desired width. Changes to these settings will be remembered each time you close a window.
- **Options** and **Settings** buttons on many of the main program screens allow you to edit settings specifically related to that part of the program.

2.4 Backing Up Your Data

All of your data can be easily backed up using the [Backup](#) option on the **File** menu. Frequent backups help to ensure the integrity of your data in the event of a virus, hard disk failure, or other hardware or software problem. **It is highly recommended that you perform backups regularly, and particularly whenever you've made a significant number of new entries.** The program will automatically remind you to perform a backup each time you exit, if the [Preferences](#) option "Display backup prompt when closing" has been selected.

The **Backup** option on the **File** menu backs up **all of the data in all of your active businesses, no matter which business you have open when you perform the backup operation.**

Data saved in a backup file can be restored back into the program using the **Restore** option on the **File** menu. Using the **Restore** option **replaces all of the data in the program with the data contained in the backup file, overwriting any changes you may have made since the backup file was created.**

How To Have The Program Back Up Your Data Automatically

You can have the program *create backup files for you automatically the first time it's opened each day* using the [Auto Backup Path](#) option on the **File** menu. Set this path to a location that is not on your main hard drive so that the backup files it contains will still be accessible if

your hard drive fails. An external hard drive, secondary hard drive or a USB memory stick all will work well with the **Auto Backup Path** function.

Each day when the program is first opened, it automatically creates a backup file containing all of your data. When the **Auto Backup Path** option has been set, the program makes a copy of the backup file and saves it to the location you have specified. This creates a comprehensive library of daily backup files for you to use in the event that your computer or main hard drive experiences a problem.

Tip: Windows does not generally allow programs to write data directly to a CD. If you would like to back up to a CD, first perform a backup to your Windows Desktop, then use your CD-writing software to copy the backup file from there onto the CD. Alternatively, consider using a USB memory stick instead of a CD for storing your data backup files since Windows can write directly to a memory stick.

Important: Before relying on a backup file as your only means of restoring data it's recommended that you use the [Verify Backup](#) function on the **File** menu to confirm the backup file's integrity.

2.5 Transferring Data Between Computers

To transfer all of your data from one computer to another, use the [Backup](#) and [Restore](#) functions on the **File** menu as described below:

1. Perform a backup onto a USB memory stick or other removable media, using the [Backup](#) option on the **File** menu on the first computer. You can also back up to your computer's hard drive and then email the backup file to the second computer.
2. Perform a restore, using the [Restore](#) option on the **File** menu on the second computer along with the backup file created in Step 1.

The **Restore** function *completely replaces all of the data in the program with the data in the backup file*, so be sure that you only make changes on one computer at a time when using this approach to transfer your data. If your program is set up to sync to a handheld organizer make sure that you leave the program open and perform a sync operation immediately after restoring data.

For information on the best way to handle reformatting of your computer after a virus or other problem please see [Viruses and Hard Drive Problems](#).

Data synchronization, which allows you to merge contact, team, income, expense, sale and purchase information between two computers is available in the Professional Edition of the program.

2.6 Merging Data Between Two Computers

The program includes functions for merging Contact, Team, Event, Income, Expense, Sale and Purchase entries between two computers, by exporting data from one computer and importing it into

another. This allows you to make entries on one computer and *merge those changes* into your database on another computer, without overwriting or losing data. This is different than the **Backup** and **Restore** functions which always *replace all of your data* with the data in the backup file. Merging data between computers is especially useful if you have a local or remote assistant who helps you with data entry.

IMPORTANT: Considerations When Syncing Data

Contact Notes

Contact data will never be overwritten when syncing data between two computers since the program has no way of knowing which information is more current for each of your contacts. The program will attempt to merge Notes entries for contacts that appear both in the import file and in the program you are importing into. If a contact record that's being imported already exists in the program, then the following rules will be applied to the Notes entry for that contact.

- If the Notes entry being imported includes the complete Notes entry in the program, any additional information in the Notes being imported will be appended to the Notes entry in the program.
- If the Notes entry in the program includes the complete Notes entry being imported, no changes will be made
- If the Notes entry being imported and the Notes entry in the program both include uniquely different information, then the program will look for the first difference between the two entries, and append everything after that point from the Notes entry being imported into the existing Notes entry in the program.

Event Numbers

The same Event may have different Event numbers in the two computers. If an Event being imported has the same Event number as a different Event that's already in the program, the imported Event will be given a new number. Sales records on both computers will still "know" the Event number they are linked to, so this should not cause any problems when filtering displays or reports by Event.

Invoices (sales)

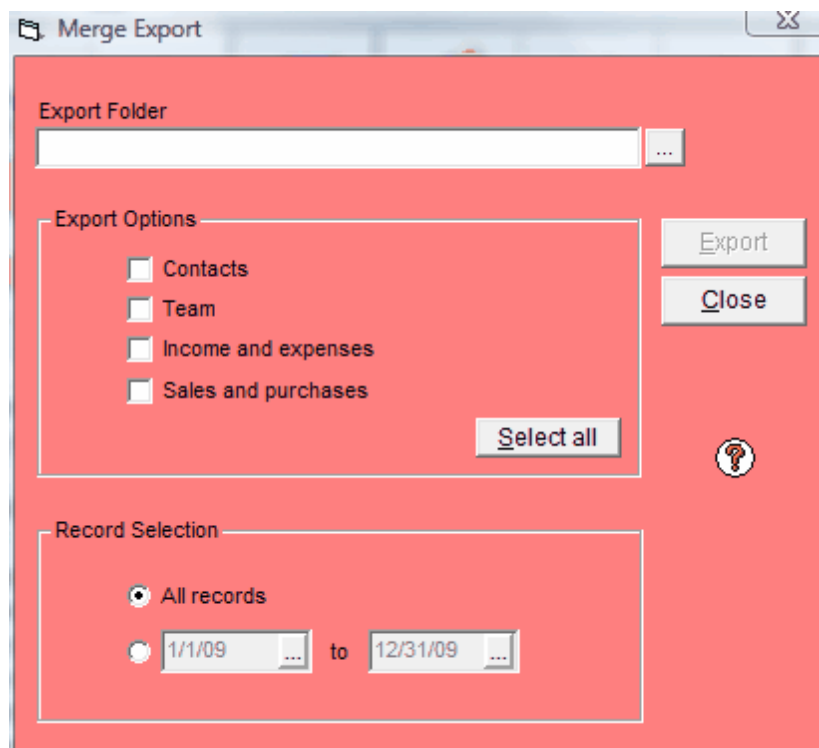
If you are actively entering invoices (sales) on two computers simultaneously, you will want to take steps to avoid invoice numbering conflicts. For example, if invoice 1022 exists on both computers and it refers to a different transaction on each computer, there's no way for the program to "merge" both of these invoices into one program. In the event of a conflict like this, the invoice being imported will simply be skipped. An easy way to avoid this problem is to set one installation's starting auto invoice number to 100000 and the other one's starting auto invoice number to 200000 so that the two systems never produce the same invoice number. To set the starting invoice number, enter the desired starting number in the Invoice # box and make sure that the "Auto number" checkbox is checked, when recording a sale. The next sale you enter will automatically start numbering invoices from the last number that was manually entered.

Export and Importing Data

Exporting Data

To export entries so that they can be merged into a different installation of the program, just do the following:

1. Click on the [Data Merge - Export \(EZX\)](#) option on the **File** menu to open the **Merge Export** window.



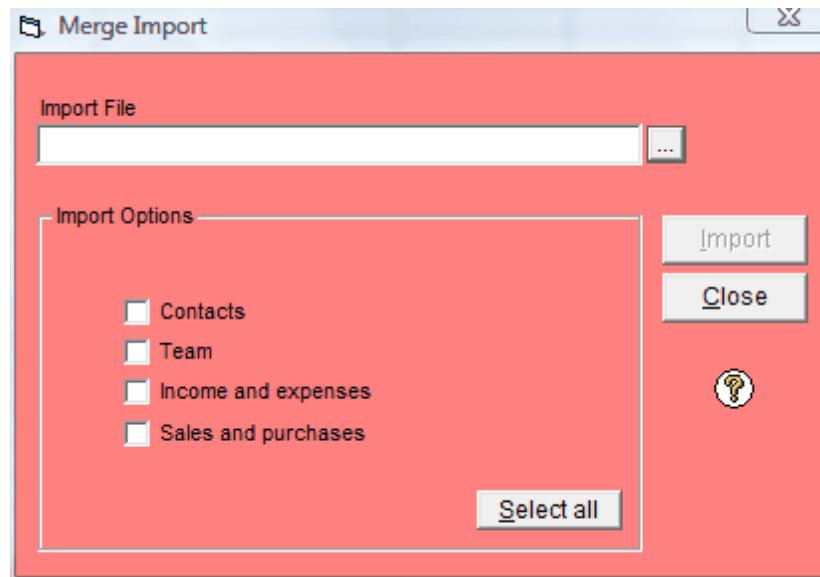
2. Click on the ellipsis (...) button next to the "Export Folder" box and select a folder where the exported information will be saved.
3. Select the desired options in the "Export Options" section of the window.
4. Select "All records" or specify a date range in the "Record Selection" section of the window.
5. Click on **Export**.*
6. Write down the name and location of the export file when it is displayed in the **Export Results** window. Export files always end with an "ezx" extension and are only compatible with the **Merge Import** function on the **File** menu in Consultant Front Office.

* If the **Export** button is not enabled, make sure you have selected at least one of the "Export Options" and that your "Export Path" entry leads to a writeable folder on your computer.

Importing Data

To import entries from an ezx file created using the **Merge Export** option on the **File** menu, just do the following:

1. Click on the [Data Merge - Import \(EZX\)](#) option on the **File** menu to open the **Merge Import** window.



2. Click on the ellipsis (...) button next to the "Import File" box and locate the export (ezx) file that contains the data you wish to import.
3. Select from the available options in the "Import Options" section of the window. If one or more options are disabled it indicates that there is no information of that type in the file being imported.
4. Click on **Import** to import the data and display the **Import Results** window. The program will skip any import records that appear to duplicate existing information. Duplicate matching is based on the following criteria:
 - Contacts: name, address, phone or email
 - Income and Expenses: date, category, amount
 - Sale and Purchases:
 - Events:
5. All imported transactions will be listed in the **Import Results** window. No information will be imported for records that are skipped, except with respect to Contact Notes. If a contact record that's being imported already exists in the program, then the following rules will be applied to the Notes entry for that contact.
 - If the Notes entry being imported includes the complete Notes entry in the program, any additional information in the Notes being imported will be added to the Notes entry in the program.
 - If the Notes entry in the program includes the complete Notes entry being imported, no changes will be made
 - If the Notes entry being imported and the Notes entry in the program both include uniquely different information, then the program will look for the first difference between the two entries, and append everything after that point from the Notes being imported into the Notes in the program

2.7 What To Do If Your Spouse Is Also A Consultant

If you and your spouse are both distributors for the same company you will need to decide whether to set up a single business for both of you or to set up separate businesses for each of you.

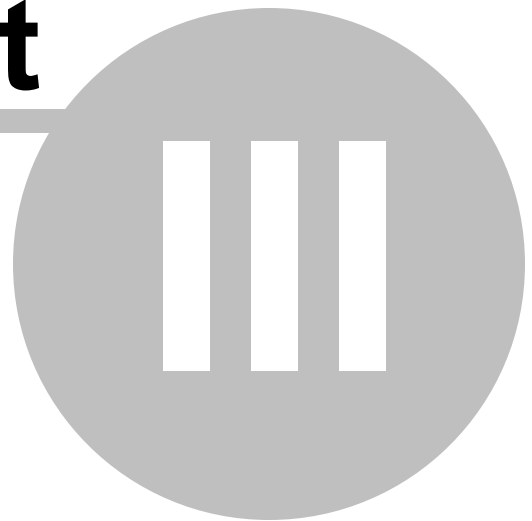
If you are using the "Full-Inventory" edition of **Consultant Front Office**, it is *strongly recommended that you set up only one business to avoid having to keep the inventory from each of your businesses completely separate.*

If you are not using the "Full Inventory" edition of the program, then the decision hinges on your desire to track contacts and finances separately. You may want to consult your tax advisor regarding this before making a decision.

2.8 Networked Computers

Consultant Front Office is not "multi-user" software and should generally not be accessed by multiple computers over a network. Opening the database from more than one computer at a time will result in "read-only" status and the data seen by the "read-only" computers will not be updated when changes are made on the primary machine.

Part



Getting Started

3 Getting Started

3.1 How To Get Started

In most cases, your motivation to learn the software will be:

- Your wish to grow your business more quickly and efficiently AND / OR
- Your desire to get paperwork organized and get your recordkeeping in shape

Here are some steps to help you get started with either (or both) of these objectives!

Building Your Business – Overview

1. **Contact groups:** The key to setting up your contact database is to decide what **Contact Groups** make the most sense for your business. Setting up your list of **Groups** before you begin entering people into your software will make your database more useful along the way. Decide what "groups" you would like to use to divide up your contact database, then create those groups using the **Contacts** option on the **Categories** menu.
2. **Entering contacts:** Click on the **Contacts** button on the main toolbar then click on **New**. Enter or [import](#) the people you would like to begin contacting on a regular basis (e.g. prospects, reorder customers and potential hosts).
3. **Targeting:** Use the [Filter](#), [Search](#) and [Select](#) buttons on the **Contacts** screen to target specific groups of contacts for phone calls, mail-merge emails, printed communications and address labels.
4. **Communicating:** Click on the mail-merge [Email](#) or [Letters](#) buttons on the **Contacts** screen to create personalized templates for staying in touch with your various groups of contacts.
5. **Automating:** Click on the [Schedules](#) button on the **Contacts** screen to create activity schedules that help ensure consistent and appropriately automated follow-up. You can also click on the [Recurring](#) button to schedule birthday, anniversary, team renewal and "tickler" emails for automatic delivery.
6. **Scheduling:** Click on the [Calendar](#) and [Tasks](#) buttons on the main toolbar to schedule your business activities. You can also keep track of the next appointment and task you have for each of your contacts by entering them at the bottom of the **Notes** tab on the **Contacts** screen.
7. **Staying personal:** As you connect with people, be sure to enter a few **Notes** on the **Contacts** screen. This allows you to connect with people more personally the next time you email or call.

Setting up Recordkeeping - Overview

[See also - IRS Small Business Resources](#)

1. **Customers:** Customer contact information can be entered in one of two ways. To add

contacts to your database without entering any sales information, click on the **Contacts** button on the main toolbar then click on **New**. To enter customer information at the same time you're entering what they purchased (often the case) click on the **Sales** button on the main toolbar then click on **New**, then click on the second ellipsis (...) button to the right of the **Customer** box to display a "mini" Contacts screen.

2. **Events:** Most financial transactions and any of your contact can be linked to an "event" for filtering and reporting purposes. Events can be parties, craft shows, fundraisers etc., or any other "connection" that exists between customers and their purchases. Linking entries to **Events** allows you to filter your database for customers and activities associated with that Event. To create an Event, click on the **Events** option on the **Categories** menu then click on **New**. To select an **Event** throughout the program click on the ellipsis (...) button to the right of the **Event** boxes, then highlight the Event and click on **Select**.
3. **Purchases:** Before entering your first purchase, click on the **Contacts** button on the main toolbar, then click on **New**, and enter the company you sell products for into your contact database so that you can select them as the **Vendor** in the **Purchases** window.
Purchases: Before entering your first purchase, click on the **Contacts** button on the main toolbar, then click on **New**, and enter the company you sell products for into your contact database so that you can select them as the **Vendor** in the **Edit Purchases** window.
4. **Sales:** If you're entering sales from a party, fundraiser, craft show or other "event" that you would like to be able to get reports on, you will want to create that Event in the program prior to recording the sales. Customer information can be entered directly from the **Edit Sales** screen using the second ellipsis (...) button to the right of the **Customer** box. Checking the "Potential Host", "Booked Event" or "Potential Recruit" checkboxes on the **Edit Sales** screen automatically adds the customer to those contact **Groups** when the sale is saved. If you use ProPay™ for credit card processing, you can upload your customers' credit card payments to ProPay directly from this software, without ever having to go to the ProPay website.
5. **Income / Expenses:** To enter income and expenses not directly tied to the purchase or sale of products click on the **Income / Expenses** button on the main toolbar then click on the **Income** or **Expense** button to add a new income or expense record.

Income: Your main source of income will be commissions, bonuses etc. that you receive from the company you work with. If your company provides you with a 1099 at the end of the year, you can enter the exact amount of income shown on the 1099 as a single entry each year. If you prefer, you can make an entry for each check or payment you receive from your company throughout the year.

Expenses: The fastest and easiest way to enter your expenses (office supplies, software etc.) is to put all of your business purchases on a dedicated credit card, then enter those expenses directly from your statement at the end of each month. You can also download your statement electronically in Microsoft Money® (OFX) or Quicken® format (QIF / QFX) from your bank or credit card company's website and [import](#) the entire statement onto the **Income / Expenses** screen instead of having to enter each expense manually. While this may sound a bit "tricky", it's really fairly easy to do and can be a huge timesaver in keeping your recordkeeping up to date.

6. **Personal Use**, **Product Samples**, **Product Loans** and **Product Trades:** Personal use,

product samples, product loans and products trades can be entered using the menus at the top of the program (Loans and Trades can only be found in the Standard and Professional Editions). These menus are provided for your convenience to help you determine what products you used for these purposes at the end of the year. The only entry you will be required to make to complete your business taxes will be to estimate the cost of items used for your personal use, since these items are not deductible. This entry will be made on the **Taxes** screen at the end of each year but it may be easier to estimate this number if you have kept track of your personal use via the **Personal Use** menu in the program.

7. **Car and Truck:** In the Standard and Professional Editions, car and truck business expenses are entered on the **Vehicles** screen. The IRS allows you to deduct vehicle expenses using one of two methods. The "Actual expenses" method allows you to deduct a portion of all of your vehicle expenses based on the percentage of business use. The "Standard mileage rate" method allows you to deduct a specific dollar amount for each business mile you drive. Check out [IRS Resources](#) for more information on deducting car expenses.
8. **Home Office:** In the Professional Edition, home office expenses can be entered on the **Home Office** screen. All of the categories of deductible expenses are listed on the screen to help prevent overlooked deductions. Categories in the "Monthly Expenses" section of this screen are of two different types. For categories labeled "(house)" you will want to enter the total amount your household spent each month. These expenses will be prorated based on the percentage of your house actually used for business. For categories labeled "(office)", enter only those amounts spent directly on your home office. These expenses will be completely deductible. Check out [IRS Resources](#) for more information on deducting home office expenses.

3.2 IRS Small Business Resources

The following IRS resources may be useful to you in understanding what you can deduct in the course of doing business and how your deductions should be documented.

- [Starting a Business and Keeping Records \(Publication 583\)](#)
- [Travel, Entertainment, Gift and Car Expenses \(Publication 463\)](#)
- [Business Use Of Your Home \(Publication 587\)](#)
- [How To Depreciate Property \(Publication 946\)](#)
- [Tax Guide For Small Business \(Publication 334\)](#)
- [Tax Withholding and Estimated Tax \(Publication 505\)](#)
- [Self-Employment Tax \(Publication 533\)](#)
- [Withholding Calculator](#)
- [Retirement Solutions](#)
- [Tax Information for Retirement Plans](#)
- [Small Business Federal Tax Responsibilities](#)
- [Small Business Resources](#)

3.3 Using Help

There are several ways to access online Help. The best method is to click on any of the **Help**  buttons that can be found throughout the program. This will bring up context-sensitive help that is specific to the area of the program you are working in. Context-sensitive help can also be accessed at any time by pressing your **F1 key**. You can also activate Help by clicking on the **Help Topics** option on the **Help** menu or by clicking on the yellow question mark just above the left side of the main program toolbar.

The Help system has three views. The **Contents** organizes the help information according to the different screens in the program. The **Index** and **Search** tabs allow you to search the Help system for keywords or phrases pertaining to a specific topic.

Please remember that our website and online Knowledgebase have additional information that may be helpful. To access the Training page on our website, click on the [Training](#) option on the **Help** menu. To check our Knowledgebase or submit a support request ticket, click on the [Support](#) option on the **Help** menu.

Part



IV

Home

4 Home

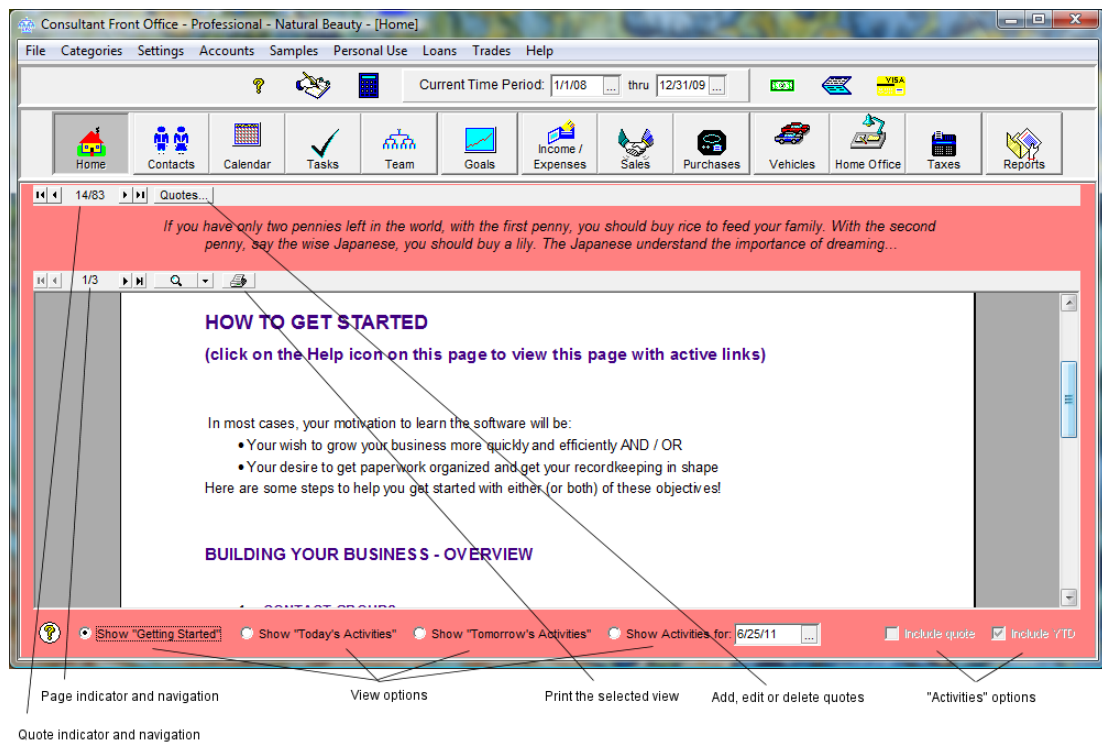
4.1 Overview - Home

(The program opens to the **Home** screen by default each time you start it. If you would like to change the starting screen for your program, click on the [Preferences](#) option on the **Settings** menu and select an alternate starting screen.)

The **Home** screen offers two different views, depending on which of the following two options is selected in the lower left corner of the screen.

☐ Show "Getting Started"

By default, the program will open to the "Getting Started" view and display instructions for building your business and organizing your paperwork. These same instructions can be viewed with active links by clicking on the  button in the lower left corner of the **Home** screen.



☐ Show "Today's Activities", "Tomorrow's Activities" or "Activities by Date"

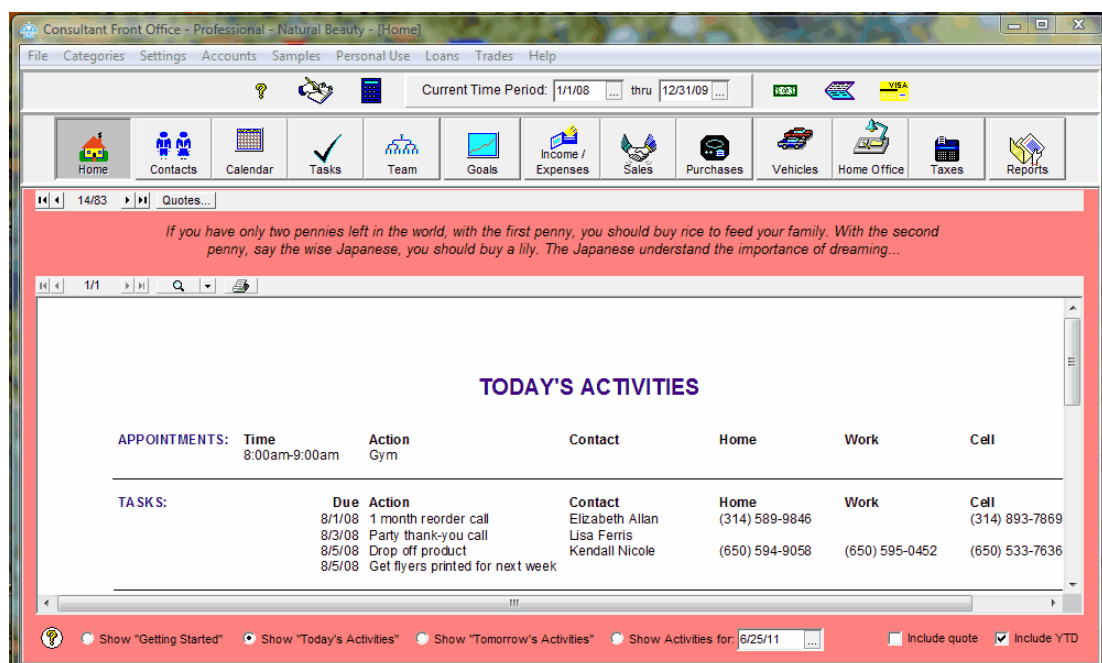
Once you've printed out the instructions for getting started and are familiar with the program, you will want to switch over to one of the "Activities" views, using the option buttons at the bottom of the **Home** screen. These views provide a summary of your appointments, tasks, birthdays and anniversaries for today, tomorrow, or any day you choose. This summary can be easily printed out

and taken with you wherever you go.

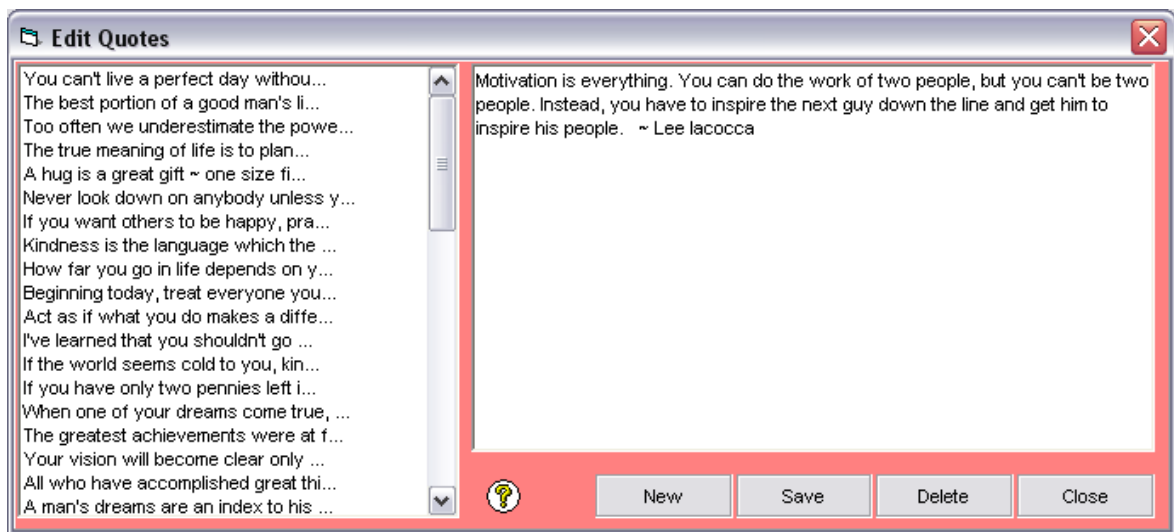
If you would like to have the quote at the top of the page included in your "Activities" printout, check the box at the bottom of the **Home** screen that reads "Include quote".

If you would like to have a year-to-date financial summary included in your "Activities" printout, check the box at the bottom of the **Home** screen that reads "Include YTD".

Tip: When using the "Show Activities for" option, you will either need to set the date using the pop-up calendar OR click somewhere outside of the date entry box after setting your date, to tell the program to refresh the "Activities" display. Remember that **Up** and **Dn** arrow keys can be used to change the date one day at a time and that **PgUp** and **PgDn** keys can be used to change the date one week at a time.



4.2 Quotes



Clicking on the **Quotes** button on the **Home** screen displays the **Edit Quotes** window. This window allows you to add to, edit or delete from the list of quotes that are displayed on the **Home** page.

☐ **To add a new quote to the list**

1. Click on the **New** button in the **Edit Quotes** window.
2. Type the quote into the box on the right side of the **Edit Quotes** window.
3. Click on **Save** to add your new quote at the bottom of the list on the left.

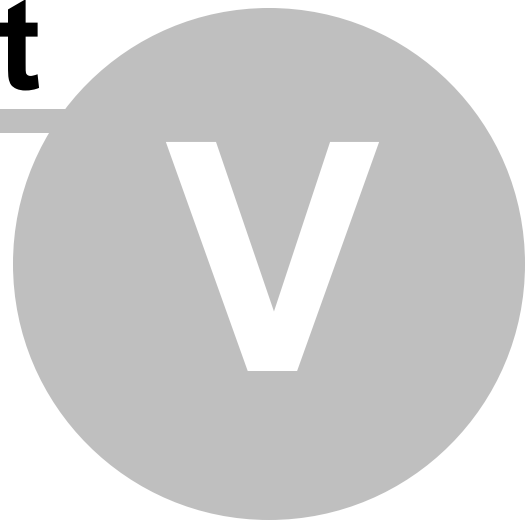
☐ **To edit a quote in the list**

1. Click on the quote you would like to edit in the list on the left. This will cause the full quotation to be displayed in the box on the right.
2. Make the desired changes in the box on the right.
3. Click on **Save** to save your changes.

☐ **To delete a quote from the list**

1. Click on the quote you would like to delete in the list on the left.
2. Click on **Delete**.
3. Click on **Yes** when prompted to confirm the deletion or on **No** if you change your mind and do not want to delete the quote.

Part



Contact Management

5 Contact Management

5.1 Overview

The program is designed to handle all of your contact management needs and support you in customer follow-up and in building a re-order business. The contact management section of the program consists of four main screens as follows:

Contacts: used to add people or make changes to your contact database

Calendar: used to create, edit and view your appointment calendar
(Standard and Professional Editions only)

Tasks: used to keep a running list of tasks you need to complete
(Standard and Professional Editions only)

Team: used to view your team genealogy
(Professional Edition only)

Detailed information for all of these screens can be found by locating the appropriate topic in the main Table of Contents or by clicking on the links above.

5.2 Contacts

5.2.1 Overview

The **Contacts** screen is used to keep track of everyone involved in your business. It's also used to organize address information, keep notes, broadcast mail-merge emails, write mail-merge letters, and print address labels. All of the names entered on this screen appear throughout the program wherever a contact entry is required.

All businesses being tracked in the program share the same contact information. Business filters can be used to allow you to temporarily view only contacts associated with a single business. These filters can be applied automatically each time you change from one business to another using the **Options** button on the **Contacts** screen.

The **Contacts** screen is accessed by clicking on the **Contacts** button at the far left of the main program toolbar.

Target contacts based on their Group or Sales / Event history

Target contacts by searching for specific entries

Target contacts by selecting

Undo your last Filter, Search or Select operation

Make changes to many contacts at one time

Mail-merge email

Mail-merge letters

Mail-merge address labels

Consultant Front Office - Demo - Professional (full inventory) - Natural Beauty - [Contacts]

File Categories Settings Accounts Samples Personal Use Loans Trades Inventory Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Target 41 Total: 41 Selected: 1

Contact: Allen, Hank

Filter Search Select Restore Change Email Letters Labels

	First	Last	Pri. Group	Address 1	City	State	Postal	Email	Phone	Cellular
23	Robert	Jantzen	Downline	35976 Preston Street	Redwood City	CA	94063	rjantzen@interserve.com	(415) 363-4556	
24	Sarah	Jantzen	Downline	35976 Preston Street	Redwood City	CA	94063		415-363-4556	
25	Blake	Jasper	Downline	539 Cordilleras	San Carlos	CA	94070		415-595-0398	
26	Gregg	Loren	Downline							
27	Claire	Masters	Downline							
28	Bill	McIntyre	Downline							
29	Dylan	Michaels	Downline	44 Third Avenue	San Mateo	CA	94045		415-344-6785	
30	Jennifer	Michaels	Downline	44 Third Avenue	San Mateo	CA	94045		415-344-6785	
31	Bruce	Mosstet	Downline	4900 Crestview	San Carlos	CA	94070		415-595-0366	
32	Valorie	Mosstet	Customer	4900 Crestview	San Carlos	CA	94070		(415) 595-0366	
33	Steve	Nichols	Downline							
34	Kendall	Nicole	Customer	1115 Ruby Avenue	San Carlos	CA	94070	knicole@kynetics.com	(650) 594-9058	(650) 533-763
35	William	Phelan	Downline					williamphelan@kynetics.com		
36	Claire	Roberts	Customer	243 Second Avenue	San Mateo	CA	94404	claireroberts@kynetics.com	(415) 343-5677	
37	Janie	Roberts	Import	455 Sycamore Street	San Mateo	CA	94405	jamesroberts@kynetics.com	415-343-3998	
38	Glenn	Rogers	Downline							
39	Linda	Savoy	Downline					lindsavoy@kynetics.com		

☒ Show top panel
 Schedules Recurring Activities Options Print Copy Merge New Delete

Create follow-up schedules

Create recurring emails (birthdays, anniversaries etc.)

View a list of all appointments, tasks and scheduled emails

Select which columns to display

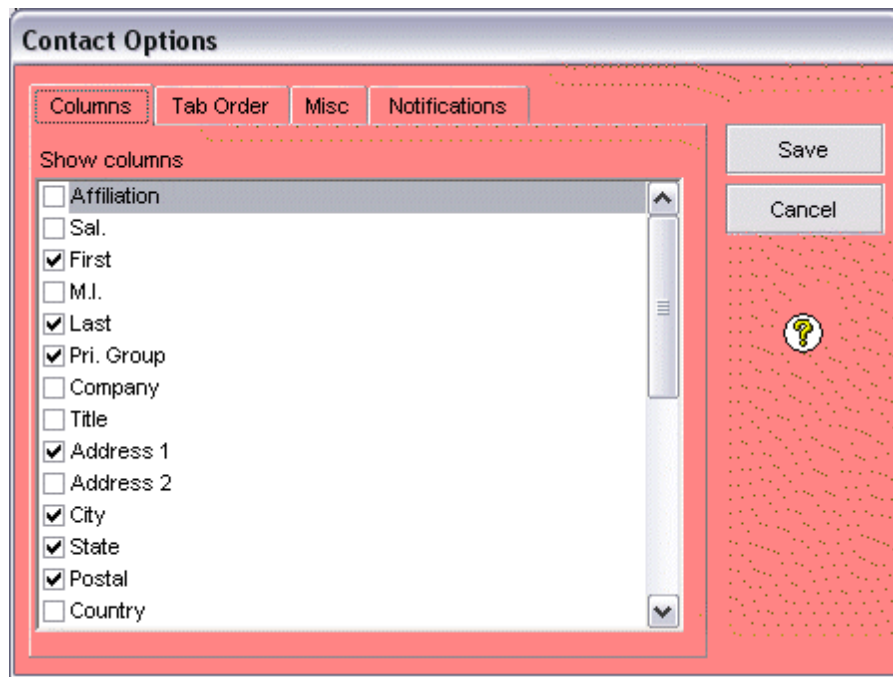
Make a copy of this contact

Merge this contact info another

5.2.2 View Options

All of your contact viewing options can be set by clicking on the **Options** button in the main **Contacts** screen or in the **Edit Contacts** window. Some of these options pertain to the main screen while some of them pertain to the editing window as described below.

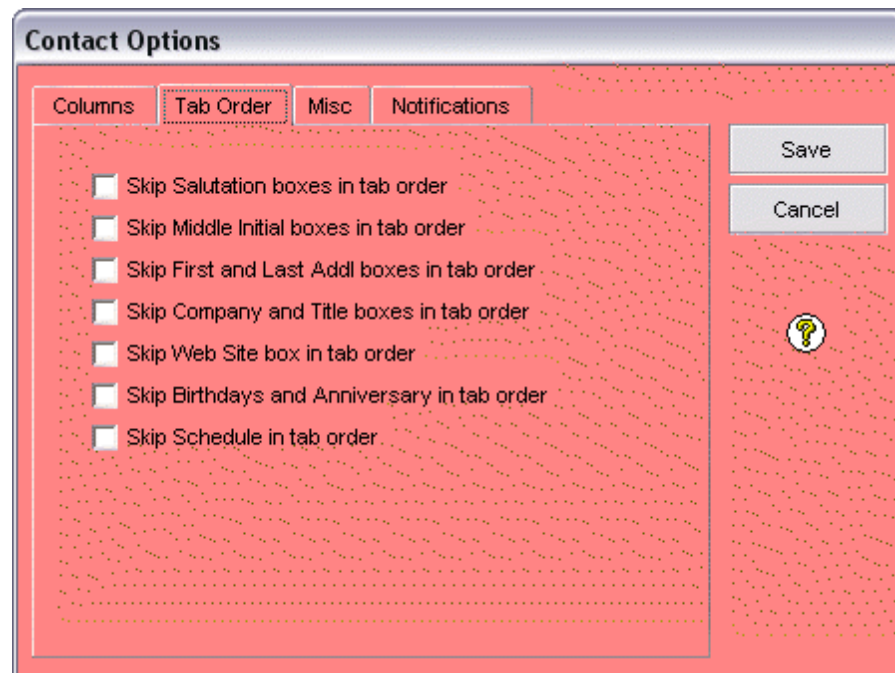
Main Contacts Screen Options



Selecting the "Columns" tab allows you to specify which columns should be visible and which should be hidden in the display. Columns can be resized by hovering over the line between columns in the top row of the display. The display can also be sorted by clicking on any of the column headings. Column widths and sorting order are automatically saved whenever changes are made.

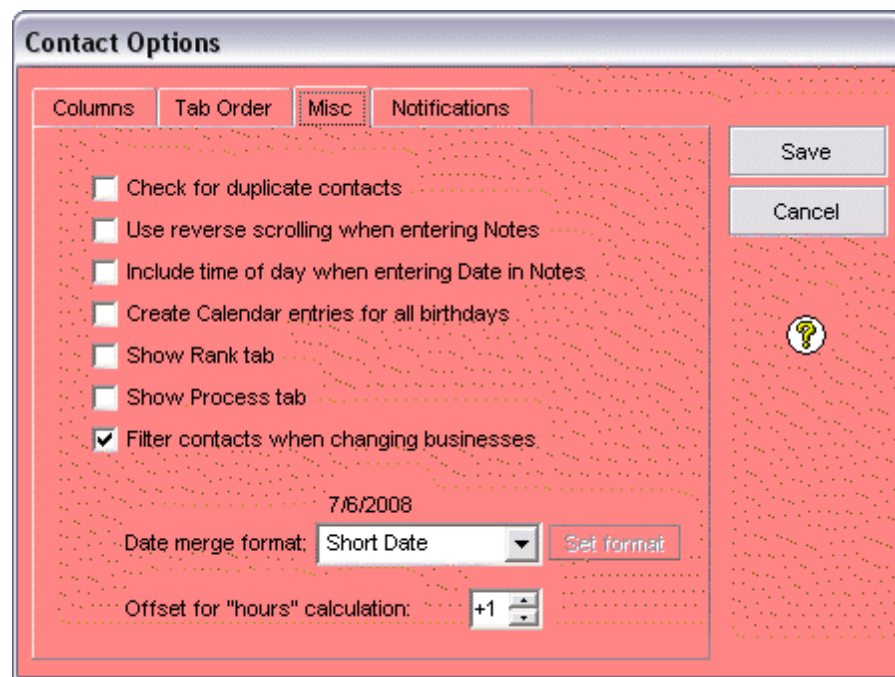
Edit Contacts Window Options

-  Tab order



Selecting the "Tab Order" tab in the **Contact Options** window allows you to specify which fields you would like to skip when using your TAB key to navigate through the **Edit Contacts** window. For example, if you seldom enter a Salutation or Middle Initial for your contacts, you would probably choose to skip those fields to make it quicker and easier to get to the fields you use most often.

☐ Miscellaneous Options



Selecting the "Misc" tab in the **Contact Options** window allows you to specify a variety of options as follows:

Check for duplicate ...	Causes the program to prompt you if the First and Last name or the Home phone number of the listing being saved are the same as the First and Last name or Home phone in another listing
Use reverse scroll ...	Instructs the program to position the cursor above any existing entries in the Notes field when a listing is first selected and whenever the Enter key is pushed
Include time of day ...	Causes the program to include the time as well as the date when using the Date button in the Notes field on the Contacts screen
Create Calendar ...	Causes the program to automatically create appointments in the Calendar for all birthdays entered and saved on the Contacts screen
Show Rank tab ...	Makes the Rank tab available whenever you go to the Contacts screen
Show Process tab ...	Makes the Process tab available whenever you go to the Contacts screen
Filter contacts ...	Causes the program to automatically apply an Business filter whenever you change from one business to another using the Change Business option on the File menu
Date merge format	Allows you to specify the format you would the program to use when merging contact date information (e.g. birthdays, anniversaries etc.) into emails and letters.
Offset for "hours"	Allows you to add or subtract one or more hours to the program's

...

normal **hours** (time difference) calculation. Time difference values displayed on the **Contacts** screen are based on the contact's state of residence relative to the state of residence of the registered user. If the default value is usually an hour too high or low, you can use this feature to increase or decrease the calculated values. You can also override the program's default entries at anytime by typing directly into the **(hours)** box on the **Contacts** screen.

☐ Notification Options

The screenshot shows the 'Contact Options' window with the 'Notifications' tab selected. The window has a title bar and four tabs: 'Columns', 'Tab Order', 'Misc', and 'Notifications'. The 'Notifications' tab is active, showing a 'Miscellaneous' section with three checkboxes and their corresponding values and units: 'Show birthday notice(s)' with a value of 7 and 'day(s) early', 'Show anniversary notice(s)' with a value of 7 and 'day(s) early', and 'Show renewal notice(s)' with a value of 14 and 'day(s) early'. Below this is a 'Caller ID' section with a checkbox 'Listen for Caller ID match on port:', a dropdown menu set to 'COM3', and a 'Find' button. Below the dropdown is a text field for 'Modem string:' containing 'AT#CID=1' and a note '(Leave blank to have set automatically)'. On the right side of the window are 'Save' and 'Cancel' buttons, and a help icon (a question mark in a circle).

Select the "Notifications" tab in the **Contact Options** window allows you to turn on automatic birthday, anniversary and renewal notifications as follows:

Show birthday ...	Causes the program to display a list of upcoming birthdays at startup.
Show anniversary...	Causes the program to display a list of upcoming anniversaries at startup.
Show renewal...	Causes the program to display a list of upcoming team renewals at startup.
Caller ID... (Professional only)	Causes the program to "listen" for incoming Caller ID signals on your phone line. If Caller ID information is detected, the program searches for the phone number in your contact database. If the number is found, the program asks if you would like to switch to that listing. If not found, you are given an option to start a new

listing.

This feature requires that you subscribe to a Caller ID service from your phone service company. It also requires that your computer's modem be compatible with Caller ID and able to detect Caller ID information when your phone rings. To have the program automatically detect the best **Modem String** to use leave this box blank. Put a check in the box that reads **Listen for Caller ID...** and click on the **Find** button to have the program locate your modem. Then click on **OK** to have the program test different strings and pick the best one to work with your modem.

Depending on your selections in the **Contact Options** window and on the options available for the company you sell products for, you will see between 2 and 5 tabs on the right side of the **Edit Contacts** window. Here is a brief description of the purpose of each of those tabs.

- Listing:** This view allows you to enter and view detailed contact information for any contact.
- Notes:** This view allows you to keep notes and quickly identify, create or edit the next scheduled appointment and task for the selected contact.
- Profile:** This view allows you to track client responses to preloaded questions and to print or email product recommendations based on those responses. This view is only available in certain custom editions of the program.
- Rank:** This view allows you to define up to eight ranking criteria for each of your contact **Groups**. For example, you might choose to rank prospects on their entrepreneurial desire or capabilities. You can then assign a numeric level to each person for any or all of these criteria. The [Filter](#) button can then be used to find contacts based on a specified **Rank** (e.g. all Prospects who have a **Rank** of 75 or above). This view is only available if the "Show Rank tab" option has been selected using the **Options** button on the **Contacts** screen.
- Process:** This view allows you to define up to eight steps or milestones for each of your contact **Groups**. For example, you might choose to keep track of each team member's progress in meeting training and business goals. The [Filter](#) button can then be used to target communications based on a specified position in the process (e.g. all Event Hosts who haven't yet shadowed a party). This view is only available if the "Show Process tab" option has been selected using the **Options** button on the **Contacts** screen.

5.2.3 Contacts Top Toolbar

(Standard and Professional Editions only except for Labels)



Filter: This button displays the **Filter Contacts** window allowing you to temporarily reload the **Contacts** screen with specific groups of contacts. Groups can be "filtered" based on categories you select when you enter each person, on previous purchasing history, on attendance at specific events, and on their **Rank** and **Process** status.

Search: This button displays the **Search Contacts** window allowing you to temporarily reload the **Contacts** screen with contacts whose entered information contains, or doesn't contain, specific text or characters.

Select: This button displays the **Select Contacts** window allowing you to temporarily reload the **Contacts** screen with only those contacts you select before closing the window. Using the **Change** button immediately after selecting contacts allows you:

- To quickly create new contact groups, by assigning a new **Additional Group** to all **Target Listings** or
- To delete a large number of contacts without having to remove them one by one.

Restore: This button cancels the effect of any **Filter**, **Search** or **Select** operations and reloads the **Contacts** screen with all of your saved contacts.

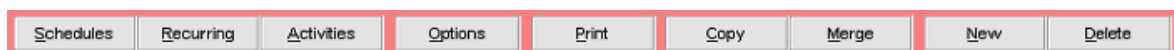
Change: This button displays the **Contact Group Changes** window allowing you to make group-level changes to your contact database. *It is generally a good idea to perform a backup of your data prior to making group-level changes. Backing up your data prior to making changes allows you to revert back to your pre-change status in the event that the changes you make do not work out as intended.*

Email: This button displays the **Email History** window containing a list of all of the emails sent out using the program. The **Email History** window also contains buttons for creating new mail-merge email and for resending or forwarding a previously sent email message.

Letters: This button displays the **Letters** window allowing you to create mail-merge documents and letters.

Labels: This button displays the **Address Labels** window allowing you to preview or print standard or custom address labels for select groups of contacts.

5.2.4 Contacts Bottom Toolbar



Schedules: This button opens the **Follow-Up Schedules** window allowing to create or edit activity schedules containing appointments, emails and tasks.

Recurring: This button opens the **Recurring Email Setup** window allowing you to

create birthday, anniversary, renewal and tickler emails to be sent automatically by the program.

Activities: This button opens the **All Activities** window allowing you to view a list of all appointments, tasks and scheduled emails that are currently in the system. This window is also available via the binoculars icon on the **Edit Contacts** screen, where it displays only those activities relating to the currently selected contact.

Right clicking in either the **All Activities** window or in the **Activities** window for a specific contact allows offers a menu with options for creating, editing and deleting appointments and tasks and for deleting scheduled emails.

Options: This button opens the [Contact Options](#) window allowing you to customize the **Contacts** screen to your liking.

Print: This button prints what is currently displayed on the **Contacts** screen (other contact reporting options, including user-defined contact reports in the Professional Edition, are available on the **Reports** screen).

Copy: This button copies an entire listing into a new record, which can then be modified without affecting the original listing. This feature is useful for duplicating address information when entering members of the same family.

Merge: This button allows you to merge information for two contacts, thereby eliminating one of the contacts, while retaining associations that exist between both contacts and other records in the program. To merge two contacts, first select the contact that you want to eliminate, then click on **Merge** and select the contact you want to keep. Then set the various **Merge Options** and click on **Merge**.

New: This button displays and / or clears the **Edit Contacts** screen and places the cursor in the **Salutation** or **First Name** entry box, depending on the "Tab" options selected using the **Options** button on the **Contacts** screen. This button and the **New** button in the **Edit Contacts** window both clear the **Edit Contacts** window and may be used interchangeably.

Delete: This button deletes all of the currently selected contacts and clears the **Edit Contacts** screen if it is currently displayed. The program will prompt you to confirm before deleting.

5.2.5 Creating Contact Groups

The key to organizing your contact database can be found in the **Business** and **Group** boxes on the **Edit Contacts** screen. These selection boxes allow you to group your contacts in any way you choose. Contact groups can then be selected individually or in combination with one another, using the [Filter](#) button on the top toolbar of the **Contacts** screen.

Business:	Natural Beauty	
Sal. / First / Last:	Elizabeth	Allan
Addl. Sal. / First / Last:		
Groups (pri - sub / addl):	Customer	- (None)
Company / Title:	Beautiful Living	

Business

If you are only keeping track of one business in the software then you do not need to worry about the **Business** setting. The **Business** selection for all of the contacts you enter will be identical to the business name you entered in the **Business Setup** window when you first started the program. If you're tracking more than one business in the software, the **Business** selection box on the **Edit Contacts** screen can be used to identify and separate contacts based on the business with which they are associated. In this case, the **Business** selection box will contain the names of all of your active businesses. Changing the name of your business using the [Rename Business](#) option on the **File** menu will simultaneously change the **Business** entry for all of that business's contacts. To select contacts based on their **Business**, use the **Filter** button on the top toolbar. Contacts can be automatically filtered whenever you change from one business to another if the "Filter contacts when changing businesses" option is selected under the **Options – Misc** button on the **Contacts** or **Edit Contacts** screen.

Groups

Groups refer to the relationships that exist between you and the people in your database as follows:

The **Primary Group** box (furthest to the left) is used to specify the *primary relationship* you have with the person being entered. Typical examples might be "Customer", "Prospect" or "Past Host". Specifying a **Primary Group** (required entry) for one or more contacts allows you to find them by filtering on that Group.

Tip: If you will be synchronizing with a Palm-compatible handheld, you may want to limit the number of Groups you use in the software to 15, to make sure that there's room for all of them in the handheld device. Please see [Synchronizing - Special Considerations](#) for more tips on managing Palm categories.

The **Subgroup** box just to the right of the hyphen is used to break a primary Group into subsets. For example, someone with a **Primary Group** of "Team" might have a **Subgroup** of "Business Builder". Specifying a **Subgroup** for one or more contacts allows you to target them separately from other people in the same **Primary Group** using the **Filter** button on the **Contacts** screen.

The **Addl...** button to the far right of the the two Group boxes is used to specify additional groups for the person being entered. For example, someone with a **Primary Group** of "Customer" might also be a "Friend", a "Relative" or one of the people on your "Christmas Card List". Specifying these **Additional Primary Groups** for one or more contacts allows you to find them by filtering on *any one of* these Groups.

New **Groups** can be added by right clicking on either **Group** box, using the [Contacts](#) option on the **Categories** menu or using the **Edit List** button in the **Additional Primary Groups** window.

Several **Group** categories have special significance. Assigning a primary or additional primary Group of **Crossline** or **Upline** allows you to make entries in the **Title**, **I.D. #** and **Anniversary** boxes in the lower right corner of the **Edit Contacts** screen. Assigning a primary or additional primary Group of **Downline** allows you to access these three boxes and also the **Upline** selection box. Assigning members of your team to their immediate upline by selecting the upline's name in the **Upline** box, allows you to **Filter** on specific segments of your team. In the Professional Edition, It also allows you to view and print your team using the **Team** screen, or to view and print indented reports using the **Team (genealogy)** option on the **Reports** screen.

5.2.6 Entering Contacts

Edit Contacts

Target: 41 Total: 41

Contact: Allan, Elizabeth (Since Feb 5, 2006)

Business Affiliation: Natural Beauty

Sal. / First / Last: Elizabeth Allan

Addl. Sal. / First / Last:

Groups (pri - sub / addl): Customer - (None) Add

Company / Title: Beautiful Living

Address: 445 Winding River Rd.

City / St / Postal: St. Louis MO 55416 -1 (hrs)

Country:

Email (pri): elizabeth@beautifuliving.com Email History

Email (sec):

Web Site: www.beautifuliving.com

Home / Fax / Cell: (314) 589-9846 (314) 893-7869

Work / Ext / Custom: Voice Mail

Birthdays (pri / addl): 5/28/88 Anniversary

Schedule / Start Date: Customer Followup 5/28/08

Schedule / Start Date:

Wish List: 101, 103

Hobbies:

Pets: Alex

Kids Names: Jarod and Christie

Source: Mistral's

Credit Card: 4111 1111 1111 1111 0909 Visa

Last Order: 2/17/06 \$0.00

Last Event: 2/17/06 Jamie's party

Last Host: Jamie Roberts

Next Event:

Next Host:

Booked Event:

Team Information

Sponsor:

Upline:

Level / Title:

ID# / Renew:

Events Options Print New Save Cancel

Opens the Events window

Opens the Contact Options window

Prints this person's contact information

Closes this window without saving

Save entries

Clears the screen to add a new contact

Tip: The **Options** button on the **Edit Contacts** screen contains settings that allow you to

customize and simplify the way contact information is entered. You may want to click on this button and look over the settings it contains before beginning to build your contact database.

To enter a new contact into your contact database, just do the following:

1. Click on the **Contacts** button to go to the **Contacts** screen.
2. Click on the **New** button on the bottom toolbar of the **Contacts** screen to open the **Edit Contacts** window.
3. **Name:** Enter a first (optional) and last name. (You can also enter a salutation and middle initial as well as a second person's name information if you choose.)
4. **Primary Group:** Select the category that best describes your *primary relationship* with this person from the list in the first **Group** box. The primary **Group** entry is used to separate out groups of contacts using the **Filter** button. If the contact being entered is a member of your team please see these special instructions for [entering team members](#).

The above entries are the only entries that are required to save a new contact listing.

If you are done entering information for this person, click on the **Save** button on the bottom toolbar of the **Edit Contacts** screen to save your entries, otherwise, continue with the next step.

5. **Subgroup:** Select a category from the second **Group** box (just to the right of the hyphen) if you would like to specify a *subgroup* that this person should be a member of (e.g. Primary Group: Team, Subgroup: Business Builder). *Do not use this box to add people to more than one contact group.* Filtering using a Subgroup requires a match on both the primary Group and the Subgroup. To add a contact to more than one group use the **Addl** button to the right of the **Subgroup** box.
6. **Addl Groups:** Click on the button that reads "Addl..." to the far right of both **Group** boxes to open the **Additional Primary Group** window. You may select as many **Additional Primary Groups** for a person as you like. **Additional Primary Groups** allow you to associate a person with multiple groups for use with the [Filter](#) function.
7. **Addresses:** Enter this person's main address into the **Address** boxes on the **Contacts** screen. If you would also like to enter a secondary address, click on the "open book" icon to the right of the **Address** boxes to display the **Secondary Address** window. Clicking on the **Switch** button in the **Secondary Address** window causes the window to exchange entries with the corresponding boxes on the **Contacts** screen. Checking the box that reads "Use this address for labels" causes the program to use the **Secondary Address** entries whenever a label is created for this person. Checking this box affects only the listing that is being edited and will not affect which address is used for any of your other contacts.
8. **Email:** Enter this person's primary email address in the first **Email** entry box. A second email address can also be entered into the second **Email** entry box. The program defaults to the first email entry when a person's name is selected in the **Email** window. If two email addresses have been entered on the **Contacts** screen, a double arrow will be displayed to the right of the two **Email** entry boxes allowing you to quickly switch their contents. The "envelope" icon that appears to the right of either **Email** box when a valid email address has been entered, can be used to quickly send an [email](#) to that person using the selected email address.
5. **Phones:** Enter phone or fax information into any of the four pre-defined phone fields. Do not attempt to format the numbers as you enter them. Just type the numbers in and the program will format them for you. There is one user-defined phone field to the right of the **Work** and **Ext** boxes. The heading for this field can be set by clicking directly on the box label and entering a new heading.
6. **Birthdays:** Enter a **Birthday** for one or both of the people associated with this listing. Options to have an appointment created and to have the program display a birthday notification can be set using the **Options** button on the **Contacts** screen. If you set up a [recurring email](#) for **Birthdays**

- you can check the box next to the **Birthday** fields to activate that email for this person.
7. **Anniversary:** Enter this person's wedding anniversary. If you are using the Standard or Professional Edition, options to have the program display an anniversary notification can be set using the **Options** button on the **Contacts** screen. If you set up a [recurring email](#) for the **Anniversary** field you can check the box next to the **Anniversary** field to activate that email for this person.
 8. **Schedule:** If you are using the Professional Edition, select one or two pre-defined schedules of activities for this person in the two **Schedule** boxes and enter or select a date on which each schedule should become active. Creating and assigning [schedules](#) allows you to quickly apply a consistent set of follow-up activities to one or more of the people in your database. Clicking on the "binoculars" icon to the right of the **Schedule** boxes displays the **Activities** window, containing a list of all of that person's appointments, tasks and scheduled emails. Right clicking in the **Activities** window allows you to create appointments and tasks or to delete any of the listed activities.
 9. **Wish List:** Clicking on the heart icon to the right of the **Wish List** box allows you to select any number of items from your list of products to add to a contact's "wish list". In the Standard and Professional Editions, **Wish List** products can be searched on using the **Search** button on the **Contacts** screen.
 10. **User-definable fields:** Enter information into the four custom (user-definable fields) at the top right hand side of the **Listings** tab in the **Edit Contacts** screen. The names of these four fields can be changed by clicking directly on the label in front of any one of the boxes and then entering the new name(s) in the pop-up window.
 11. **Credit Card:** Enter this person's default credit card number and card expiration date. The entries in the **Credit Card** box on the **Contacts** screen are used by the program in two ways:
 - **Credit Card** information gets pulled into the **Payment History** window whenever you select a name from your list of contacts in conjunction with a **Credit** payment. This can be useful if several people are contributing payments towards a single purchase or sale. The **Payment History** window can be accessed by clicking on the ellipsis (...) button to the right of the **Balance Due** box on the **Purchases** and **Sales** screens
 - **Credit card** information is pulled by the [Upload Invoices](#) window whenever you upload payment information to ProPay™ for automatic credit card processing.

In the Professional Edition, clicking on the "credit card" icon to the right of the **Credit Card** boxes displays the **Credit Cards** window, allowing you to store information for up to three additional credit cards. The default card shown on the **Edit Contacts** screen can be selected in this window by clicking on the selection button in front of any of the four credit card numbers.

NOTE: All credit card information stored in the software is encrypted using AES-256 bit encryption.

12. **Last Order:** The **Last Order** date and amount get filled in automatically whenever you enter a transaction on the **Sales** screen and select one of your contacts as the **Customer**. These automatic entries can be overridden by checking the box in front of the **Last Order** date box, in case you would like to track a [drop ship](#) or Internet order that was not entered on the **Sales** screen. Clicking on the "spreadsheet" icon to the right of the **Last Order** box displays the **Purchase History** window, containing a list of all of that person's previous purchases that have been entered on the **Sales** screen.
13. **Last Event / Last Host:** These boxes contain [Event](#) and **Host** information based on the most recent **Sales** screen entry for this contact. The information in these boxes can be used to locate all of your contacts who attended certain events using the **Filter** button on the **Contacts** screen. Clicking on the firecracker icon to the right of the **Last Event** entry box displays the [Event History](#) window, containing a list of all **Events** with which this person is associated. Contacts get

associated to **Events** whenever they are selected as the **Customer** for a sale that's linked to that **Event** or when you choose to add them to the **Event** using the **Add** button in the **Event History** window.

14. **Next Event / Next Host:** These boxes contain [Event](#) and **Host** information based on a contact having been added to an **Event** that has not yet occurred. The information in these boxes can be used to locate all of your contacts who have been invited to attend certain events using the **Filter** button on the **Contacts** screen, allowing you to send out invitations, email them reminders or just give them a call. Clicking on the firecracker icon to the right of the **Next Event** entry box displays the **Event History** window, containing a list of all **Events** with which this person is associated.
15. **Booked Event:** These boxes contain [Event](#) information for this contact's next event. Clicking on the bell icon to the right of the **Booked Event** boxes allows you to add or edit this contact's event directly from the **Edit Contacts** screen.
16. **Notes:** Click on the **Notes** tab and add any notes to the listing that are appropriate. The **Notes** box can be scrolled from bottom to top, so that your most recent notes are at the top of the box, if that option is selected using the [Options](#) button on the **Contacts** screen. The maximum number of characters that can be entered into the **Notes** field is 8000.
17. **Profile:** This tab will only be available in certain custom editions of the program. If appropriate, click on the [Profile](#) tab and select this person's responses to the questions that are displayed there.
18. **Rank:** If appropriate, click on the [Rank](#) tab and enter numerical rankings for each of your defined criteria.
19. **Process:** If appropriate, click on the [Process](#) tab and check off any prospecting steps this person has already completed.
20. Click on the **Save** button on the bottom toolbar of the **Edit Contacts** screen to save your entries.

NOTE: A contact listing can also be created or edited from other screens in the program (e.g. Sales, Purchases, Events, Loans, Trades) using the screen below. The entries on this "mini" Contacts screen follow the same descriptions as their corresponding fields on the main **Edit Contacts** screen.

5.2.7 Entering Your Team

Team members are entered like any other contact except that they must be assigned a **Primary Group** of "Downline".

Your team must be entered from the top down, starting with one or more of your immediate *frontline* members and building all the way down their leg. **The registered owner's name appears automatically in the Upline box on the Contacts screen, so you do not need to enter yourself in order to start entering your team.** The registered owner's name is the name you entered when you first installed the program. You will use this name as the starting point for entering your team (the registered owner's name can be changed using the [Owner Info](#) option on the **Settings** menu).

The **Upline** entry box is the key to entering your team correctly. This box is where you specify the immediate upline (that is, **who the person being entered is directly under**). Each team member you enter is automatically added to the **Upline** selection list.

To begin entering your team, do the following.

1. Click on the **Contacts** button on the main toolbar to go to the **Contacts** screen.
2. Click on the **New** button on the bottom toolbar of the **Contacts** screen to open the **Edit Contacts** window.
3. Enter one of your front-line member's first and last names in the boxes provided (e.g. Susan Smith).
4. Skip down to the left-most (primary) **Group** box and select **Downline** from the list provided.
5. Skip down to the lower right corner of the **Edit Contacts** screen to the section labeled **Team Information** and select your name in the **Upline** box, using the button on the right side of the box.
6. If this team member was sponsored by someone other than their immediate upline, enter the sponsor's name into the **Sponsor** box.
7. Select the appropriate **Title** for this person in the **Title** box. Also enter their **ID#** and **Renewal** date. The list of "Titles" can be edited by clicking on the ellipsis (...) button to the right of the **Title** box.
8. Click on the **Save** button on the bottom toolbar of the **Edit Contacts** screen. Note that the program automatically sets the **Level** box entry to "1".
9. Click on the **New** button on the bottom toolbar of the **Edit Contacts** screen.
10. Enter one of Susan Smith's front-line member's first and last names.
11. Skip down to the left-most (primary) **Group** box and select **Downline** from the list provided.
12. Select "Smith, Susan" in the **Upline** box using the button on the right side of the box.
13. Click on the **Save** button on the bottom toolbar of the **Contacts** screen. Note that the program automatically sets the **Level** box entry to "2".

Repeat Steps 9 through 13 for each successive member in that leg of your team. Then return to Step 3 and enter your next front-line member's first and last names.

5.2.8 Selecting a Contact

An existing contact can be selected in one of three ways.

1. By clicking into the **Contact** box on the **Contacts** or **Edit Contacts** screen and typing the first few letters of the contact's last name, then pressing Enter. Pressing Enter twice in the the **Contact** box on the main **Contacts** screen will select the contact and also display the **Edit Contacts** screen.
2. By clicking on the ellipsis (...) button on the right-hand side of the **Contact** box on the **Contacts**

or **Edit Contacts** screen. This opens a window listing all of your contacts where you can type or use your mouse to select a name.

3. By clicking directly on that contact's record on the main **Contacts** screen. To select more than one contact at a time, hold down your CTRL key and select each contact on the main **Contacts** screen.

The **Up** and **Down** arrow keys and the **PgUp** and **PgDn** keys can be used to scroll through your list of contacts when the cursor is in the **Contact** box on the **Contacts** or **Edit Contacts** screen. The first two methods shown above are available everywhere throughout the program whenever you need to select a contact's name.

You can also use the white arrows next to the bottom toolbar on the **Edit Contacts** screen to scroll through your contacts one at a time.

5.2.9 Editing a Contact

An existing contact's information can be edited in the following manner:

1. [Select the contact](#) you would like to edit.
2. Press your **Enter** key or double click in the **Contact** selection box or double click on a contact's record on the main **Contacts** screen to display the **Edit Contacts** window.
3. Make changes by typing directly into the entry boxes on the **Edit Contacts** screen.
4. Click on the **Save** button on the bottom toolbar of the **Edit Contacts** screen to save your changes.

A contact's information can also be edited from other screens throughout the program (e.g. **Purchases**, **Sales** and **Event**).

5.2.10 Deleting a Contact

Existing contacts can be deleted in the following manner:

1. [Select the contact\(s\)](#) you want to delete. To select more than one contact at a time, hold down your CTRL key and select each contact on the main **Contacts** screen.
2. Click on the **Delete** button on the bottom toolbar of the **Contacts** screen.
3. Click on **Yes** when prompted to confirm the operation and finish deleting the contact(s).

If the contact that is deleted has a **Primary Group** of **Downline**, all of your team members who were under that person will be "rolled up" and will now appear directly under the deleted person's former **Upline**.

5.2.11 Filtering Contacts

Filter Contacts

Business Filter

☒ Natural Beauty

☐

☐

Special Filters

Team Events

Sales Rank & Process

Primary Group Filter

☐ Booked Event ☐ Invitee

☐ Business ☐ Past Host

☐ Copy ☐ Potential Host

☐ Crossline ☐ Potential Recruit

☒ Customer ☐ Resource

☐ Downline ☐ Unfiled

☐ Friend ☐ Upline

☐ Import ☐ Vendor

☐ Select all

☐ Activate Subgroup Filter

☒ Include contacts that meet the filter criteria

☐ Exclude contacts that meet the filter criteria

☐ Filter Target contacts only

☐ Filter archived records

Apply Cancel

The **Filter** button on the **Contacts** screen displays the **Filter Contacts** window, allowing you to temporarily target a group of contacts based on their:

- Business
- Group(s)
- Sales history
- Event history
- Team position, title, renewal date or volume
- Rank settings
- Process status

Filter results persist until a subsequent Filter, Search, Select or Restore operation occurs. This means that the contact names available for selection in the **Email**, **Letters** and **Labels** windows *always reflect the results of your last Filter, Search, Select or Restore operation*, allowing you to send highly targeted communications by mail-merge email or letter, simply by filtering, searching or selecting contacts prior to clicking on the **Email**, **Letters** or **Labels** buttons. The "Target" number of currently filtered, searched or selected contacts and the "Total" number of contacts in your database are always visible in the space immediately above the **Contact** box on the **Contacts** and **Edit Contacts** screens.

To perform a **Filter** operation, just do the following:

1. Click on the **Filter** button on the **Contacts** screen. This will display the **Filter Contacts** window.
2. **Business Filter:** If you have more than one active business select the **Business(es)** you wish to include in the filtered results, by clicking on the checkboxes in the upper left of the **Filter Contacts** window. If you have only one active business, skip to the next step.
3. **Primary Group Filter:** Click on one or more of the **Group** categories in the **Primary Group Filter** box. In order to be found by a **Primary Group Filter**, a person's **Primary Group** setting, or one of that person's **Additional Primary Group** settings, must exactly match one of the selections in the **Primary Group Filter** box.
4. **Subgroup Filter:** If you choose, activate the **Subgroup Filter** by clicking the checkbox that reads "Activate Subgroup Filter" directly beneath the **Primary Group Filter** selection box. Checking this checkbox enables the **Subgroup Filter** selection box, allowing you to specify one or more *subgroups* to further refine the filtered results. *In order to be found by a Subgroup Filter, a person's Primary Group setting must exactly match one or more of the selections in the Primary Group Filter and their Subgroup setting must exactly match one or more of the selections in the Subgroup Filter.*
5. **Special Filters:** The **Sales**, **Events** and **Rank and Process** buttons in the **Special Filters** area of the **Filter Contacts** window will only be enabled if you have selected at least one item in the **Primary Group Filter** selection box. The **Team** filter button will only be enabled if **Team** is selected in the **Primary Group Filter** selection box.
 - 5.a. **Sales:** Click on the **Sales** button to display the **Sales Filter** window. This window contains five options, selectable by checkbox, allowing you to set filters based on what products your contacts have purchased, how much they've spent, when they purchased, how many times they have purchased and whether or not they have paid for all of their purchases. The results obtained using these filters are based on all of your sales entries in the program and are not affected by the **Current Time Period** setting. Selecting multiple products in the first sales filter option causes the program to find everyone who has purchased *any of the selected products*. Entering a dollar amount in the second filter option causes the program to find everyone whose *total purchases* are more or less than the amount entered, depending on which condition has been selected. When using more than one sales filter condition all of the imposed conditions must be met for a listing to be selected.
 - 5.b. **Events:** Click on the **Events** button to display the **Event Filter** window. This window allows you to set a filter based on specific events or on specific event hosts. The results obtained using these filters are based on all of your sales entries in the program and are not affected by the **Current Time Period** setting. Selecting one or more events in the first filter option causes the program to find everyone who attended *any of the selected events*. Selecting one or more hosts in the second filter option causes the program to find everyone who attended an event that was hosted by *any of the selected hosts*.
 - 5.c. **Team:** Click on the **Team** button to display the [Team Filter](#) window. This window allows you to set filters based on hierarchical position, title, renewal date or personal volume, as displayed on the **Activity** tab of the **Team** screen.
 - 5.d. **Rank and Process:** Click on the **Rank & Process** button to display the **Rank and Process**

Filter window. This window contains three options, selectable by checkbox, allowing you to set filters based on a minimum **Rank** and / or **Process** status that contacts must meet in order to be included in the filtered results. The **Rank and Process Filter** conditions you specify will only be applied to the first selected **Group**, no matter how many relations are selected in the **Primary Group Filter** selection box.

6. Determine whether you want to include or exclude contacts that match your filter criteria using the "Include contacts that meet the filter criteria" or "Exclude contacts that meet the filter criteria" checkboxes.
7. If desired, check the box that reads "Filter Target contacts only", to continue filtering from where your last **Filter**, **Search** or **Select** operation left off. Checking this box allows you to [combine Filter and Search](#) operations to apply successively more restrictive conditions to your contact database. Leave this box un-checked if you want the **Filter** operation to test all of your contacts against the specified **Filter** criteria.
8. If you have archived data in the past and would like your filter to search those archived records in addition to your current business records, check the box that reads "Filter archived records".
9. Click on **Apply Filter** to close the **Filter Contacts** window and temporarily reload the **Contacts** screen with only those people who meet the specified filter criteria. To undo the results of a filtering operation click on the **Restore** button on the **Contacts** screen.

Filtering can also be done prior to exporting contact information allowing you to create personalized documents using other applications if you choose. Use the **Restore** button on the **Contacts** screen to reload the **Contacts** screen with all of the contacts in your database once you're done working with a filtered group.

5.2.12 Searching Contacts



The **Search** button on the **Contacts** screen displays the **Search Contacts** window allowing you to search for contacts based on any of your contact fields. *Search results persist until a subsequent Filter, Search, Select or Restore operation occurs.* This means that the contact names available for selection in the **Email**, **Letters** and **Labels** windows *always reflect the results of your last Filter, Search, Select or Restore operation*, allowing you to send highly targeted communications by mail-

merge email or letter, simply by simply by filtering, searching or selecting **Contacts** prior to clicking on the **Email**, **Letters** or **Labels** buttons. The "Target" number of currently filtered, searched or selected contacts and the "Total" number of contacts in your database are always visible in the space immediately above the **Contact** box on the **Contacts** and **Edit Contacts** screens.

To perform a **Search** operation, do the following:

1. Click on the **Search** button on the **Contacts** screen. This will display the **Search Contacts** window.
2. Select a field to search on from the selection box entitled **Field to search**.
3. Enter one or more characters to search for in the entry box titled **Characters to search for**. An asterisk (*) can be used as a wildcard if you like. This is particularly useful when searching a date field, where for example, searching for "11/*" will find everyone with a November date entry.
4. If desired, check the box entitled "Search Target contacts only" to continue searching from where your last **Filter**, **Search** or **Select** operation left off. Checking this box allows you to [combine Filter and Search](#) operations to apply successively more restrictive conditions to your contact database. Leave this box un-checked, if you want the **Search** operation to test all of your contacts against the specified search criteria.
5. Click on **Search**. This will close the **Search Contacts** window and temporarily reload the **Contacts** screen with only those people who meet the specified search criteria.

Searching can also be done prior to exporting contact information allowing you to create personalized documents using other applications if you choose. Use the **Restore** button on the **Contacts** screen to reload the **Contacts** screen with all of the contacts in your database once you're done working with a "searched" group.

5.2.13 Selecting Contacts

The **Select** button on the **Contacts** screen allows you to target a group of contacts by simply selecting them on the **Contacts** screen (to select multiple contacts hold down your CTRL key and click on each contact's record). *Select results persist until a subsequent Filter, Search, Select or Restore operation occurs.* This means that the contact names available for selection in the **Email**, **Letters** and **Labels** windows *always reflect the results of your last Filter, Search, Select or Restore operation*, allowing you to send highly targeted communications by mail-merge email or letter, simply by filtering, searching or selecting **Contacts** prior to clicking on the **Email**, **Letters** or **Labels** buttons. The "Target" number of currently filtered, searched or selected listings and the "Total" number of contacts in your database are always visible in the space immediately above the **Contact** box on the **Contacts** and **Edit Contacts** screens. Using the **Select** button in conjunction with the [Change](#) button on the **Contacts** screen is a fast way to create new contact groups.

To perform a **Select** operation, do the following:

1. Hold down your CTRL key while clicking on individual rows on the **Contacts** screen.
2. Click on the **Select** button on the **Contacts** screen. This will temporarily reload the **Contacts** screen with only the selected contacts..

Selecting can also be done prior to exporting contact information allowing you to use your contact information with other applications if you choose. Use the **Restore** button on the **Contacts** screen to reload the **Contacts** screen with all of the contacts in your database once you're done working with a selected group.

5.2.14 Incremental Filtering and Searching

Incremental filtering and searching allows you to combine filter and search operations, by applying successively more restrictive conditions to your contact database. It does this by applying the new **Filter** or **Search** operation only to the group of previously filtered, searched or selected contacts instead of starting over with your entire contact database. Incremental filtering and searching is accomplished by checking the box that reads "Filter Target contacts only" or "Search Target contacts only" checkbox in the **Filter** and **Search** windows respectively.

Say, for example, that you would like to find all of your customers in the city of San Francisco who have purchased a certain product.

1. Use the **Filter** button to display the [Filter Contacts](#) window and find all of your contacts with a primary **Group** of "Customer", who also have purchased the specified product. Use the **Sales** button in the **Filter Contacts** window to specify the product you want to require your customers to have purchased.
2. Open the [Search Contacts](#) window by clicking on the **Search** button on the **Contacts** screen.
3. Check the box that reads "Search Target contacts only".
4. Search the **City** field, entering "San Francisco" in the **Characters to search for** entry box.

5.2.15 Making Group Changes

The **Change** button on the **Contacts** screen displays the **Contact Group Changes** window, allowing you to quickly make changes to selected groups of contacts. This window allows you to make *extensive changes to your contact database and should be used with care.*

It's a good idea to perform a backup using the [Backup](#) function on the **File** menu before making group changes, in case the changes do not turn out as you plan. To undo the results of a "Change" operation just restore the backup file created prior to making the changes using the [Restore](#) function on the **File** menu.

☐ Moving Contacts From One Business Or Group To Another

The **Move** button in the **Contact Group Changes** window allows you to make the following group changes:

- **Move – Business:** Move all contacts associated with one of your businesses over to a different business. This change can be made for any two active businesses, regardless of which business is open at the time. Once this change is complete, you will no longer have any contacts associated with the business named in the first selection box. Any **Team** records you may have created in this business will be assigned a **Group of Import** when they are transferred to the new **Business**.

To make a **Business** change, do the following:

1. Select the Business you want to remove contacts from in the first selection box.\
2. Select the Business you to move contacts to in the second selection box.
3. Click on the **Move** button.

- **Move – Group:** Move all contacts with a specific **Primary Group, Subgroup** or **Additional Group** over to a new **Primary Group, Subgroup** or **Additional Group**. Using this function, you may either move everyone in a certain group or subgroup or you may choose the "(All Target Contacts)" option, to move all *currently filtered, searched and selected contacts* over to a new group or subgroup.

To make a change to the **Primary** or **Subgroup** for all of your contact listings, or for all of your Target Listings, just do the following:

1. Select the **Group** to be changed in the first selection box or select "(All Target Contacts)" to change the **Group** for all of your currently filtered searched and selected contacts.
2. Select the **Group** you would like to change to in the second selection box.
3. Click on the **Move** button.

☐ Assigning a Schedule or Additional Primary Group

The **Assign** button in the **Contact Group Changes** window allows you to make the following group changes:

- **Assign – Schedule:** This option allows you to assign one of your pre-defined [follow-up schedules](#) to a designated group of contacts. Which group of people the schedule gets assigned to is determined by making a selection in the **Group** selection box. Selecting the "(All Target Contacts)" option in the **Group** selection box allows you to assign a schedule to all of your *currently filtered, searched and selected listings*. Selecting the "(None)" option in the **Schedule** selection box allows you to delete all scheduled activities for the designated contacts without affecting individually created appointments or tasks you may have entered.

To assign or clear a **Schedule** of follow-up activities for a group of your contacts, do the following:

1. Select the name of the Schedule to be assigned in the first selection box or select "(None)" to clear a previously assigned Schedule from a group of contacts.
2. In the second selection box, select the target contact Group or select "(All Target Contacts)" to assign the Schedule to all of your currently filtered, searched and selected contacts.
3. Click on the **Assign** button.

- **Assign – Additional Group:** This option allows you to assign an **Additional Primary Group** to a group of designated contacts. Which group of people the **Additional Primary Group** gets assigned to is determined by making a selection in the **Group** selection box. Selecting the "(All Target Contacts)" option in the **Group** selection box allows you to assign a schedule of activities to all of your *currently filtered, searched and selected contacts*.

To assign an **Additional Primary Group** to a group of contacts, do the following:

1. Select the Group to be assigned in the first selection box.
2. Select the target contact group based on their primary Group in the second selection box or select "(All Target Contacts)" to assign the Additional Primary Group to all of your currently filtered, searched and selected contacts.
3. Click on the **Assign** button.

Deleting a Group of Contacts

The **Delete** button in the **Contact Group Changes** window allows you to delete contacts by group rather than by selecting them on the main **Contacts** screen.

- This option allows you to delete all contacts with a certain **Primary Group** and is particularly useful for reversing the results of an **Import** operation. This feature should be used with *extreme care* as it cannot be undone and can result in the deletion of a large number of contact listings. Performing a [backup](#) prior to using the **Delete** function is highly recommended so that the backup file can be restored to "undo" the effects of a delete operation if it doesn't turn out as you had planned.

To delete a group of your contacts do the following:

1. Select the target contact group based on their primary Group in the first selection box or select "(All Target Contacts)" to delete all of your currently filtered, searched and selected contacts.
2. Click on the **Delete** button.

Replacing Text for a Group of Contacts

The **Replace** button in the **Change Contacts** window allows you to replace the contents of any contact field for all of your "Target" contacts. It also allows you to append text to the **Notes** field for all of your "Target" contacts.

The **Replace** function always affects only your "Target" contacts so make sure to use the **Filter**, **Search** and **Select** functions first if you do not want the **Replace** function to apply to all of the contacts in your database.

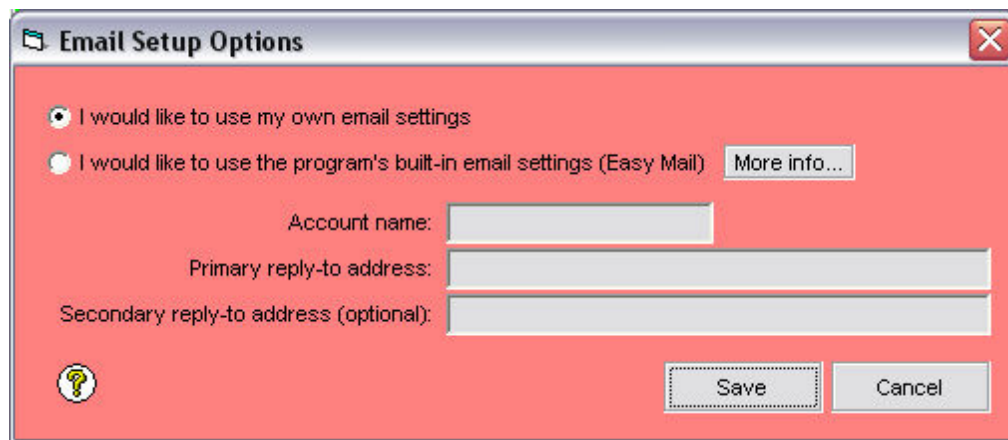
- This option allows you to replace the existing text in any contact field. If the **Notes** field is selected and the "replace" entry box is left empty, then the program will ask you if you wish

to append the **"with"** text at the end of the selected group's **Notes**. If you say "No" then the operation will be cancelled. The **Notes** box will behave like any other field, that is, text will simply be replaced where it is found, if the **replace** box contains an entry that is to be replaced. To replace text for all of your **Target** contacts, do the following:

1. Make a selection in the **In Contact field** selection box.
2. Enter the text that is to be replaced in the **replace** entry box (or leave blank with the **Notes** field to append text to the end of each person's **Notes**).
3. Enter the replacement text in the **with** entry box.
4. Click on the **Replace** button.

5.2.16 Email Setup

Opens the **Email Setup Options** window allowing you to choose whether to use your own email provider's settings for sending email from the program or to use our built-in "Easy Mail" service. The "Easy Mail" option is a subscription service allowing you to send a large number of emails per hour without the restrictions imposed by most standard email providers. For more information on this service, or to sign up for "Easy Mail" account, please click on the **More info...** button in the **Email Setup Options** window.



■ Using the Program's Built-In Email Settings (Easy Mail)

If you have purchased a subscription to our "Easy Mail" email service, select the second option in this window, then enter the "Account name" given to you by MLM Software Solutions into the **Account name** entry box. Next, enter a primary and (optional) secondary reply-to address in the two boxes provided. The **Reply-to** addresses specify where responses to the emails you send out from the program will come back to and can be any valid email address. You will be able to choose between these two reply-to addresses in the **Email** window each time you send an email.

Sending email using the "Easy Mail" option requires only that you:

- sign up for the "Easy Mail" service and enter your **Account name** in the box provided
- enter the email address(es) where you would like to receive responses
- make sure any firewall software running on your computer is set to allow **Consultant Front Office Queued Email System (SMTP_v10.exe)** to access the Internet.
- have Internet Explorer 6.0 or higher installed on your computer

Click on **Save** to test the system and confirm that you are ready to send emails. When using the "Easy Mail" service, you do not need to read the remainder of this Help topic.

Using Your Own Email Settings

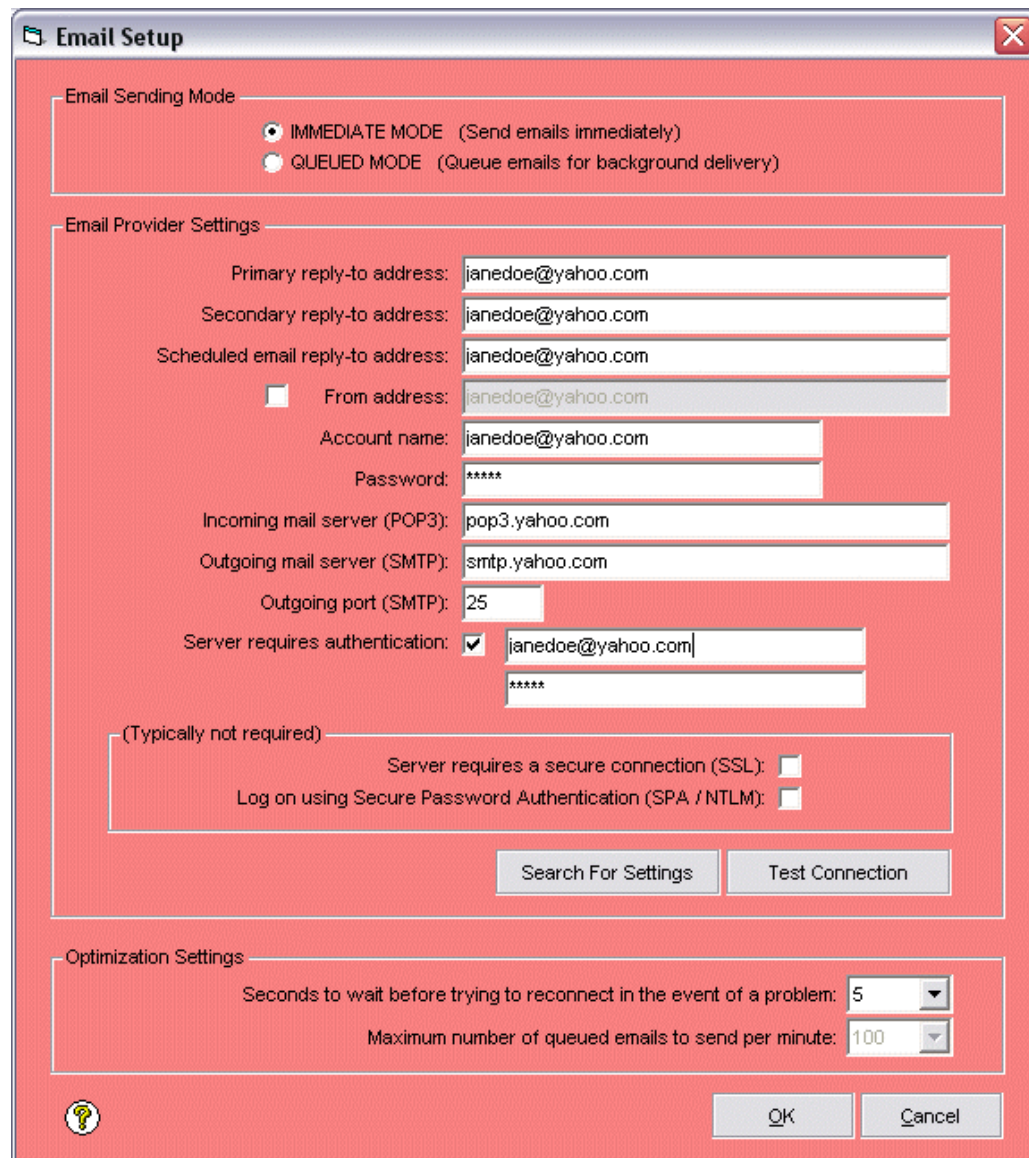
If you would like to use your own email provider's settings to send email, select the first option in this window, then click on **Save** to open the **Email Setup** window (see below).

Email Requirements

In order to use the **Email** function in the program, you must

- have an SMTP/POP3 email account (these are available from virtually every Internet Service Provider)
- make sure any firewall software running on your computer is set to allow **Consultant Front Office (CFO_v11.exe)** to access the Internet (when sending in Immediate Mode)
- make sure any firewall software running on your computer is set to allow **Consultant Front Office Queued Email System (SMTP_v10.exe)** to access the Internet (when sending in Queued Mode)
- have Internet Explorer 6.0 or higher installed on your computer.

Email Setup



The image shows a screenshot of the 'Email Setup' dialog box. It has a title bar with a close button. The dialog is divided into three main sections: 'Email Sending Mode', 'Email Provider Settings', and 'Optimization Settings'. The 'Email Sending Mode' section has two radio buttons: 'IMMEDIATE MODE (Send emails immediately)' which is selected, and 'QUEUED MODE (Queue emails for background delivery)'. The 'Email Provider Settings' section contains several text input fields: 'Primary reply-to address', 'Secondary reply-to address', 'Scheduled email reply-to address', 'From address' (with an unchecked checkbox), 'Account name', 'Password', 'Incoming mail server (POP3)', 'Outgoing mail server (SMTP)', 'Outgoing port (SMTP)', and 'Server requires authentication' (with a checked checkbox). All these fields contain the email address 'janedoe@yahoo.com' or the password '*****'. Below these fields are two unchecked checkboxes: 'Server requires a secure connection (SSL)' and 'Log on using Secure Password Authentication (SPA / NTLM)'. At the bottom of this section are two buttons: 'Search For Settings' and 'Test Connection'. The 'Optimization Settings' section has two dropdown menus: 'Seconds to wait before trying to reconnect in the event of a problem' set to '5', and 'Maximum number of queued emails to send per minute' set to '100'. At the bottom left is a help icon (question mark in a circle), and at the bottom right are 'OK' and 'Cancel' buttons.

Email Setup

Email Sending Mode

- ☒ IMMEDIATE MODE (Send emails immediately)
- ☐ QUEUED MODE (Queue emails for background delivery)

Email Provider Settings

Primary reply-to address: janedoe@yahoo.com

Secondary reply-to address: janedoe@yahoo.com

Scheduled email reply-to address: janedoe@yahoo.com

☐ From address: janedoe@yahoo.com

Account name: janedoe@yahoo.com

Password: *****

Incoming mail server (POP3): pop3.yahoo.com

Outgoing mail server (SMTP): smtp.yahoo.com

Outgoing port (SMTP): 25

Server requires authentication: ☒ janedoe@yahoo.com

(Typically not required)

Server requires a secure connection (SSL): ☐

Log on using Secure Password Authentication (SPA / NTLM): ☐

Search For Settings Test Connection

Optimization Settings

Seconds to wait before trying to reconnect in the event of a problem: 5

Maximum number of queued emails to send per minute: 100

OK Cancel

The settings to be entered in this window are unique for each person and must be obtained from your email provider as described below. To set up the email system in the program, you must enter your email account information using the **Setup** button in the **Email History** window or using the **Settings** option on the **Edit** menu in the **Email** window.

Every email provider requires different email settings making it impossible to include detailed setup instructions in this guide. *The best strategy for setting up email is to have your Internet Service Provider (ISP) assist you in setting up Microsoft Outlook Express to send and receive email*, then use the **Search for Settings** button to transfer these settings into **Consultant Front Office**. Once this is done, you will only need to enter your **Password**. The **Password** you enter must be the password given to you by your email provider. Password are always "case-sensitive", so make sure you don't have the

CAPS LOCK key on when making this entry.

This method of setting up email avoids most typographical errors and ensures that the settings being entered are the correct settings for your specific provider. All of the "reply-to" addresses (top 3 entry boxes) can generally be set to whatever email address you would like to use to receive replies to emails sent out using the program.

It's typically best to use your ISP's email settings, even if you manage your email using another system (e.g. Hotmail, Yahoo or Gmail). All ISPs we are aware of at this time offer email service that is compatible with **Consultant Front Office** and using their service usually results in the easiest setup and most reliable operation.

Entries in the **Email Setup** window are as follows:

Send emails immediately	Instructs the program to send emails immediately when you click on the Send button in the Email window
Queue emails for background delivery	Instructs the program to place "sent" emails in a queue when you click on the Send button in the Email window for delivery at a specified rate (see below - "Maximum number of queued..."). (Professional Edition only)
Primary reply-to address	Your default reply-to email address (see below)
Secondary reply-to address	Your alternative reply-to email address (see below)
Scheduled email reply-to address	Reply-to address for all emails sent out as part of a Schedule
From address	Typically the same as your reply-to address but may be set differently if required by your email provider for authentication purpose
Account name	The account name or user name assigned to you by your email provider (typically just the email address assigned to you by your Internet provider)
Password	The password assigned to you by your email provider (case-sensitive)
Incoming mail server (POP3)	Your email provider's POP3 server address (typically something like pop3.charter.net).

Outgoing mail server	Your email provider's SMTP server address (typically something like smtp.charter.net).
Outgoing port	The SMTP port used by your email provider (typically 25).
Server requires authentication	Indicates that your email provider "authenticates" email senders.
Server requires a secure connection (SSL)	This setting is not common and is not the same as standard "authentication" (see previous setting).
Log on using Secure Password Authentication (SPA / NTLM)	This setting is not common and is not the same as standard "authentication" (see above). At present, only MSN is known to sometimes require this setting.
Seconds to wait before...	The number of seconds the program should wait before reconnecting if it gets disconnected while broadcasting emails.
Maximum number of queued...	The maximum number of emails to be sent each minute when operating in "queued" mode.

Entering different email addresses in any of the three reply-to address fields allows you to select from these reply-to addresses in the **Email** window each time you send an email.

Testing Your Email Settings

You can use the **Test Connection** button in the **Email Setup** window to check your settings and to make sure the program is being allowed to access the Internet. If your connection does not test out successfully using this button then either:

- the firewall software on your computer is preventing **Consultant Front Office** from accessing the Internet OR
- there is an error in one or more of the settings you have entered

The message that is returned after clicking the **Test Connection** button will either confirm that a test email was successfully sent, or it will tell you which of the above two causes is most likely the problem.

Web-based Email Providers

Web-based email systems, such as **Yahoo (premium accounts are ok)**, **Hotmail**, **Juno** and others do not generally support SMTP/POP3 access and therefore may not be

compatible with the email sending function in the program. **You can still set your return email address to a web-based email provider (e.g. jeff@juno.com), so that responses to emails you send using the program come back to your web-based email account. You just can't use web-based email providers to send emails out unless they also offer SMTP email service.**

5.2.17 Email

The **Email** function allows you to quickly and easily broadcast individual, mail-merged emails to any filterable, searchable or selectable contact group. Emails may be sent immediately or they may be queued for delivery at a specified rate.

Email Setup

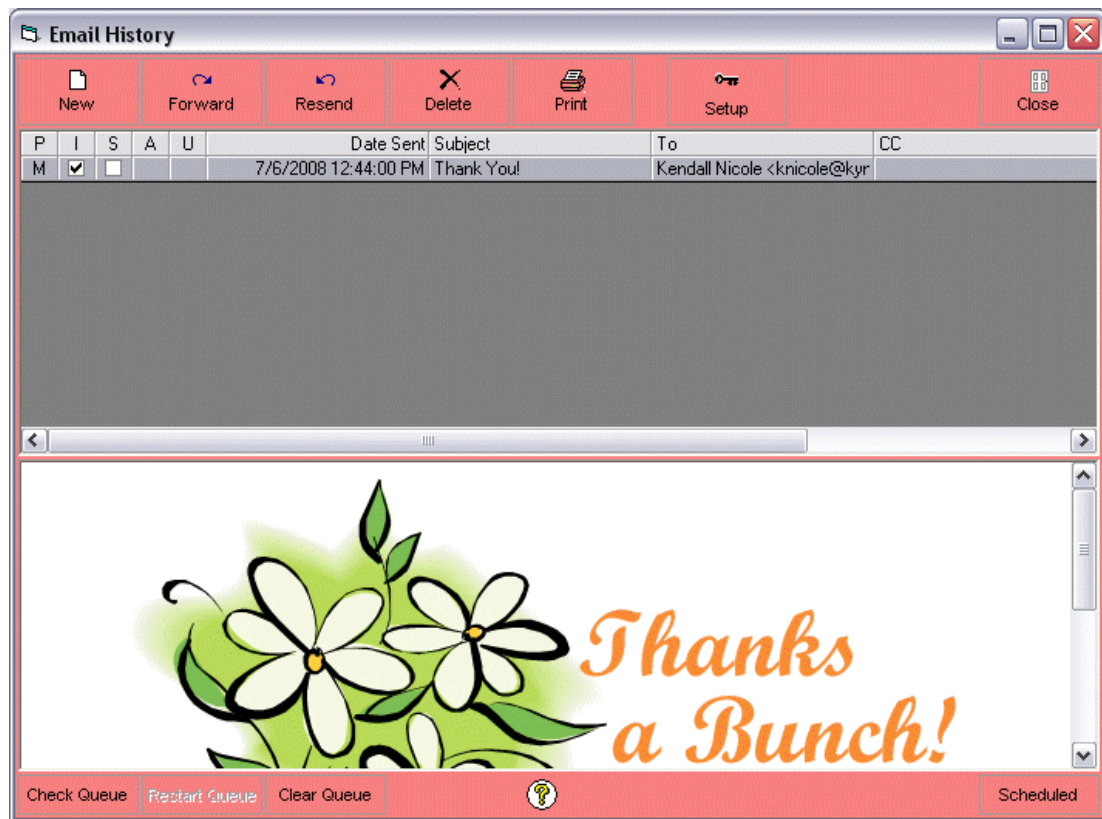
Your email account information is entered using the **Setup** button in the **Email History** window or using the **Settings** option on the **Edit** menu in the **Email** window. For more information on setting up email please see [Email Setup](#).

Email History Window

The **Email** button on the **Contacts** screen displays the **Email History** window, showing a complete history of all of your previously-sent emails. The upper portion of the window contains the history information. The lower portion of the window displays the contents of whichever email is currently selected in the upper portion of the window. The status bar at the bottom of the window shows the total number of queued emails waiting to be sent. The **Email History** window will refresh it's status automatically every 30 seconds whenever there are emails remaining in the queue, but you can force the window to refresh at any time by clicking on the queued email label. Next to the queued email label is a button allowing you to restart the queued email system. This button will only be enabled if there are queued emails waiting to be sent out. Whenever the button is enabled there will be a colored box immediately to the right of the button indicating the queued email system's current status. Red indicates that the queued email system is not currently connected to your email provider, green indicates that it is.

In general, you will not need to use the **Restart Queue** button since the queued email system runs automatically whenever there are queued emails to be sent out.

(Standard and Professional Editions only)



The first five columns in the history display contain special information regarding each email as detailed below.

P	L, M or H	Indicates this email's priority setting (Low, Medium, High)
I	checkmark	Indicates whether the Individual option was selected
S	checkmark	Indicates whether this email was sent as part of a Schedule
A	...	Indicates that this email included attachments (double click to view a list)
U	...	Indicates that queued emails have not yet been sent (double click to view a list)
		If this cell is yellow the program has not yet finished trying to send these email(s)
		If this cell is red the program was unable to complete sending of the selected email(s)

The remaining columns contain general information about each email. If an ellipsis (...) is visible in any of the recipient columns (**To**, **CC** or **BCC**), double clicking on the ellipsis will display a list of all of the recipients of that type (direct recipient, copied recipient, blind-copied recipient).

The toolbar at the top of the **Email History** window allows you to create and send or resend emails as follows.

New	Opens the Email window allowing you to create and send a new email.
Forward	Opens the Email window and then opens the currently selected file, just as though you had clicked on New and then opened the file yourself using the Open option of the File menu in the Email window.
Resend	Same as Forward except that the original recipients' names and addresses are entered into the To , CC and BCC boxes in the Email window.
Delete	Deletes the currently selected email.
Print	Prints the currently selected email.
Setup	Opens the Email Setup window.
Close	Closes the Email History window.

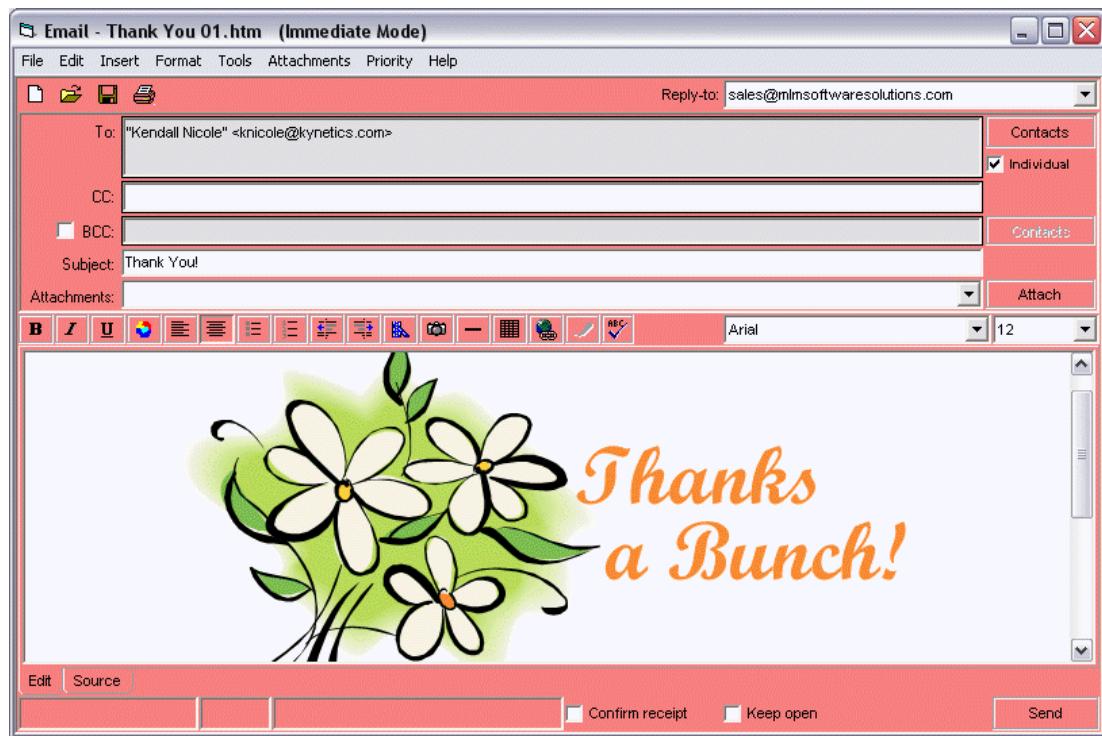
The buttons at the bottom of the **Email History** window do the following:

Check Queue:	Updates the queued email count.
Restart Queue:	Restarts the queued email sending system.
Clear Queue:	Clears all unsent emails from the email queue.
Scheduled:	Tells the program to check for Scheduled emails that are due.

In general, you should not need to use any of these buttons. The email "queue" should take care of sending and clearing emails automatically and "scheduled" emails should be sent out automatically the first time the program is opened each day, assuming that the option that reads "Check for scheduled emails at startup" is selected in the **Preferences** window (**Preferences** option on the **Settings** menu). The **Scheduled** button can come in handy if you retroactively assign a Schedule to one or more of your contacts using a **Start Date** in the past, and would like the emails that are already due to be sent out immediately.

Email Window

The **Email** window is used to create and send emails. It contains a number of powerful features that make it easy for you to stay in touch with all of your contacts with a minimum of time and effort.

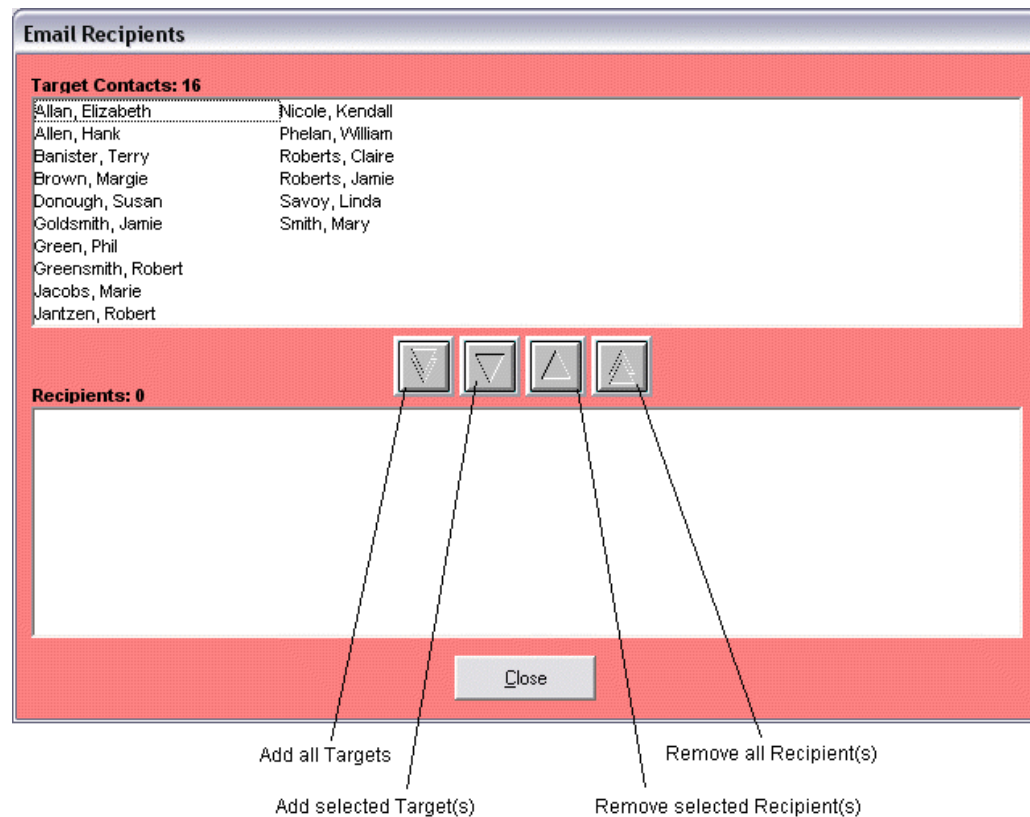


☐ Reply-To Address

If you have entered more than one "reply-to" address in the **Email Setup** window then a selection box will be visible in the upper right corner of the **Email** window allowing you to select which return address to use when sending emails. The selection box will not be visible if you have entered only one address or if all "reply-to" entries in the **Email Setup** window are the same.

☐ Selecting Recipients

The three **Contacts** buttons in the **Email** window each display the **Email Recipients** window. The **Email Recipients** window always reflects the most recent **Filter**, **Search** and **Select** results allowing you to easily target email campaigns to specific groups of contacts. By selecting individual or multiple names (hold down the **CTRL** or **SHIFT** key while clicking), then clicking on the down arrow, you can have the names and associated email addresses automatically entered into the **To**, **CC** and **BCC** sections of the **Email** window. The up and down *double arrow* buttons can be used to move all of the names in the **Target Contacts** box into the **Recipients** box and back again. Names can also be moved between the two boxes by double-clicking directly on an individual name.



Ti Contacts will not appear in the **Email Recipients** window if their contact
p: information does not include a valid entry in the **Email** field. Contacts that do not
 have an email address entry can be found by excluding all contacts with an "@"
 sign in the **Email** field, using the [Search](#) button on the **Contacts** screen.

☐ Individual Emails

Checking the **Individual** box immediately below the first **Contacts** button (checked by default), causes the program to send an individual email to each of the recipients in the **To** box, just as though you actually wrote and sent the emails separately to each person. Each of the recipients receives the exact same email, except for any personal contact information you may have merged into the email text. The email received by each person is addressed specifically to them using only their name and email address, so there is no way for them to tell that the email may have been broadcast to a larger group of recipients. Unchecking the **Individual** box causes the program to send a single email to all of the recipients in the **To** box, with everyone receiving everyone else's email address in addition to their own.

☐ Attaching Documents

To attach one or more documents or files to your email, use the **Attach** button, located next to the **Attachments** box, or just right click on the **Attachments** box and select **Add**. To remove an attachment, select the item in the **Attachments** box, then right click and select **Remove**. To view an attached file using its associated application, right click on it

and select **View**. Emails containing attachments typically take longer to send than ones without attachments. A progress bar, located in the lower left corner of the **Email** window, indicates the percentage complete when sending lengthy emails or emails with large attachments.

☐ Merging Contact Information

In addition to conventional emails, you can also create and send mail-merge emails from the program. To add a merge field to an email being created, use the **Merge Field** option on the **Insert** menu or just click on the **Insert Merge Field** icon (freeway on ramp) on the **Email** window toolbar. Merged fields are encased in double angle brackets to help distinguish them from the regular text in your emails. You can leave the **Merge Fields** window open and move freely back and forth between it and the main **Email** window while composing an email.

If the custom edition for your company includes contact **Profile** information, the last merge field selection will read "Recommended products". Inserting this merge field into an email causes the program to read each recipient's **Profile** settings and insert the appropriate recommended products, prior to sending the email. Creating an email "template" using this merge field allows you to use that template directly from the **Profile** tab on the **Contacts** screen, to send a client their **Profile** information.

Merged emails are always sent individually, with the individual contact's information being merged into the letter just before it is sent. If the **Individual** box is not checked when you click on the **Send** button with a merged email, the program will check the box automatically before the email is actually sent. Merged emails are also excellent to use when creating [follow-up schedules](#).

☐ Inserting Images into Emails

Images can be inserted using the **Picture** option on the **Insert** menu in the **Email** window or by clicking on the "camera" icon on the editing toolbar.

Many images can also be copied and pasted into the **Email** window including web page content and images from Microsoft Word documents. Email content received in Microsoft Outlook Express can also usually be copied and pasted directly into the **Email** window, however, if images do not show up when you paste them into the program, try this approach instead:

1. Open Outlook Express and save the email to a location somewhere on your computer (e.g. your Desktop)
2. Go into the **Email** window in **Consultant Front Office** and use the **Open** option on the **File** menu to open the saved email (.eml) file. To locate the file, you will need to set the **Files of type** selection to **Outlook Express Email Files (*.eml)**.

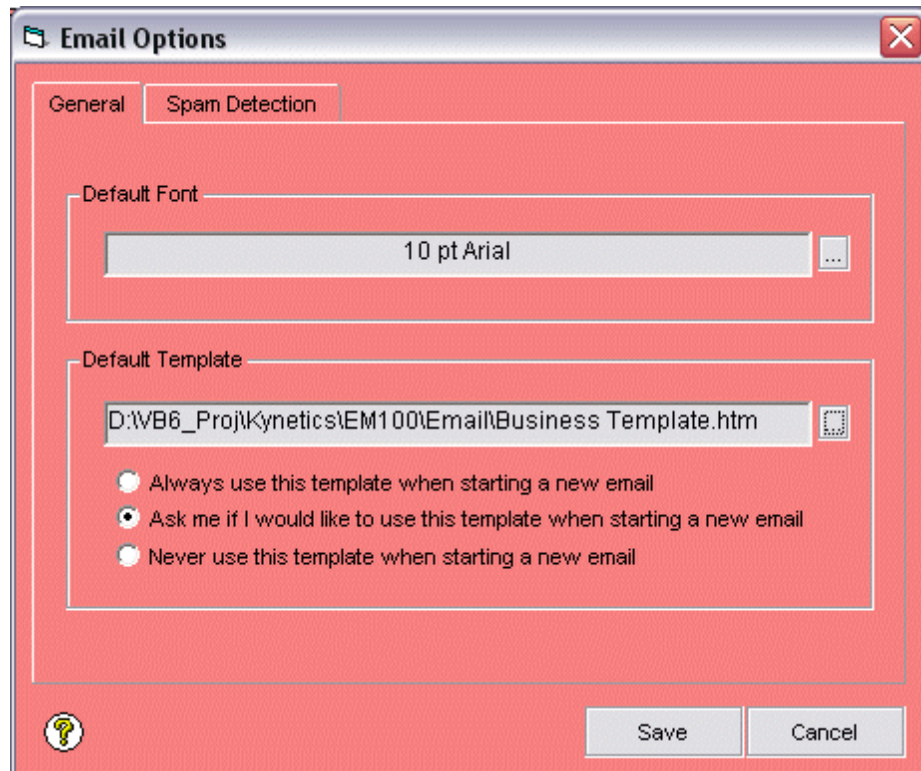
The images should then show up just as they looked in the original email.

☐ Setting a Default Font

To set default characteristics click on **Options** on the **Tools** menu then click on the **General** tab. Click on the ellipsis (...) button to the right of the **Default Font** box to select new font settings.

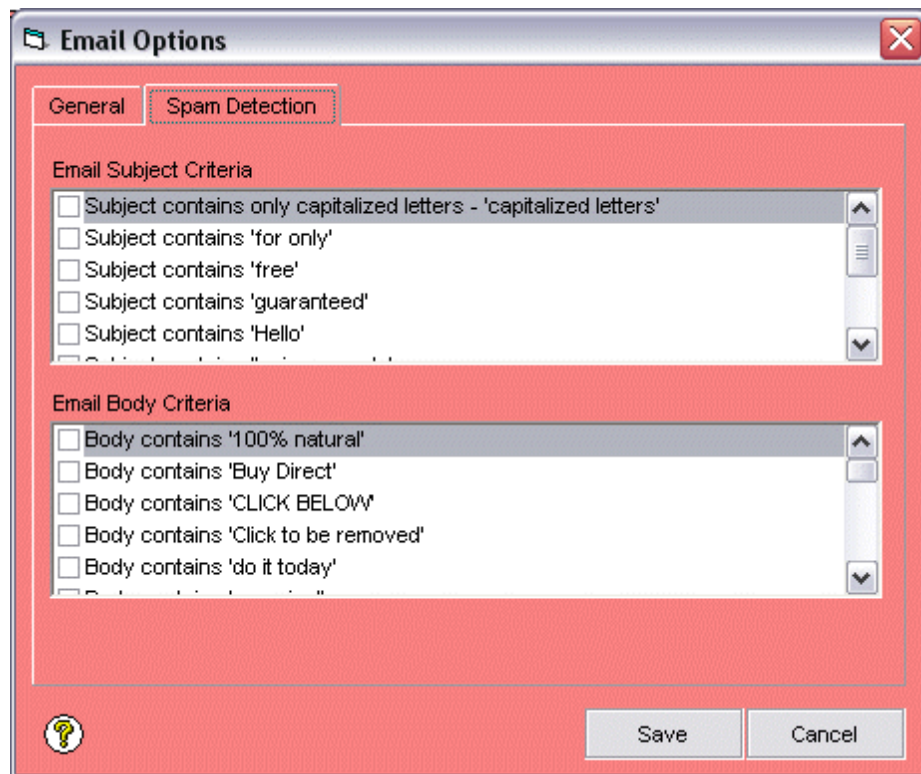
Setting a Default Template

To set up a default email template, first create the template in the **Email** window and save it to a known location on your computer's hard drive. Then click on **Options** on the **Tools** menu and use the ellipsis (...) button in the "Default Template" section of the "General" tab to locate the saved template. Options in the "Default Template" section can also be used to specify whether the program prompts you before using the template and to turn template use completely off.



Email Spam Checking

The email function in the program has a built-in ability to help you reduce the likelihood that emails you send will be blocked by a recipient ISP's spam filters. To set up spam checking in the **Email** window, click on **Options** on the **Tools** menu then click on the **Spam Detection** tab. To check an email using your selected criteria prior to sending click on the **Spam Check** option on the **Tools** menu.



■ Signature - Saving and Inserting

The program allows you to save and recall as many personal HTML "signatures" as you choose. Because of the flexibility provided in this function it can also be used for inserting any type of HTML content, regardless of whether it's truly a "signature" or not.

To save a "signature" or other HTML content for use in the **Email** window just do the following:

1. Enter and format the text you would like to save in the message section of the **Email** window.
2. Highlight the text.
3. Click on the **Save Selection As Signature** option on the **File** menu.
4. Enter a name that you will remember this signature by and click on **Save**.

To insert a "signature" or other saved HTML content into an email either:

- Click on the **Signature** option on the **Insert** menu OR
- Click on the "pen" icon on the message toolbar



Either of these will open the signatures window that will be positioned directly below the toolbar in the lower half of the **Email** window. Double clicking on a signature or selecting and clicking on **Insert** will insert the HTML content associated with that signature into the **Email** window.

Ti p: The **Save Selection as Signature** option will not be available if you have not selected at least one character of text in the message section of the **Email** window. The **Signature** option on the **Insert** menu and the "pen" icon on the message box toolbar will not be available if you have not yet saved at least one signature.

Email Address Syntax Checking

All recipient email addresses are automatically checked for correct syntax when the **Send** button is clicked. This validation process occurs *prior* to any emails being sent. If an incorrectly formatted email address is found in the list of recipients, sending is halted and the incorrectly formatted email address is displayed. Syntax checking does not verify that an email address is valid and does not guarantee that the intended recipients will actually receive all of the emails you send.

Recovering From Errors While Sending

If an error occurs while broadcasting an email to a group of contacts the program will display the name of the current recipient, and will ask you if you would like to try to continue from where the point where the error occurred. Selecting **Yes** causes the program to refill the **To** box with the names and email addresses of only those recipients who have not yet received the email, and then continue trying to send the email.

Emails Not Received by Recipient(s)

If the program displays **Message(s) sent** after clicking on the **Send** button, then your email(s) has been successfully "handed off" to your email provider for attempted delivery. This does not guarantee that the emails will in fact be delivered to the intended recipient, but it does indicate that the program has done its part in the email delivery process. Please click on the **Knowledgebase** option on the **Help** menu for up-to-date information regarding email errors or problems.

Email Errors

Email errors can be difficult to translate and oftentimes mean different things at different times

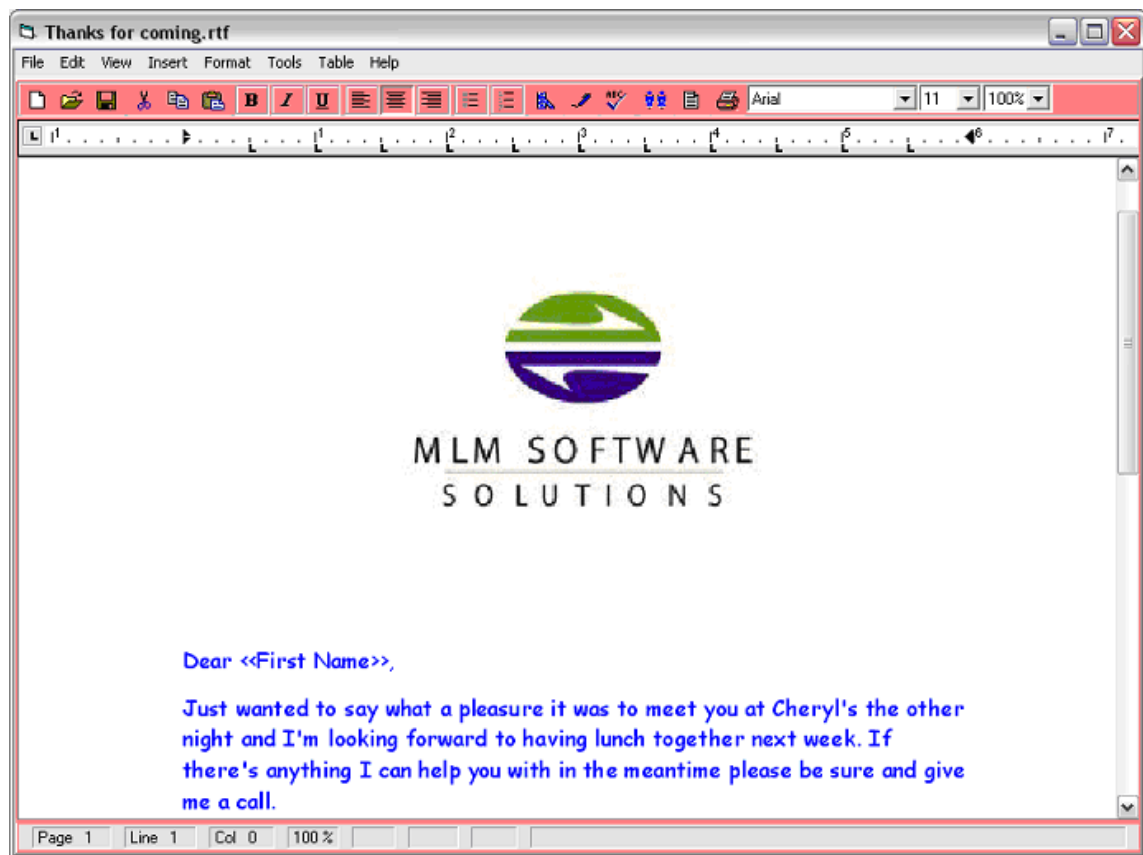
and with different email providers. Please consult our Knowledgebase for the most current information on this topic. To access our Knowledgebase click on the **Support** option on the **Help** menu.

Automatic Notes Updating

The **Preferences** window (**Preferences** option on the **Settings** menu) has an option that reads "Enter email subjects into Contact Notes". When this option is selected, the subject line from every email you send is automatically entered into the recipient's **Notes** field on the **Contacts** screen.

5.2.18 Letters

The **Letters** function allows you to easily create personalized, mail-merge documents, for any filterable, searchable or selectable group of contacts.



The **Letters** button on the **Contacts** screen displays the **Letters** window. This window combines word processing capabilities with integrated mail-merge functionality, allowing you to create individualized letters, newsletters or other documents that include each recipient's personal contact information. Any of the listing fields found on the **Contacts** screen can be merged into a document. Which

contacts are available for merging into a document when you preview or print it, depends on the most recent **Filter**, **Search** and **Select** operations. If no filtering, searching or selecting operations precede merging then all of your contacts will be available for merging.

To create a mail-merge document, do the following:

1. Click on the **Letters** button on the top toolbar of the **Contacts** screen. This will display the **Letters** window.
2. Prepare to insert a merge field by clicking on the **Insert Merge Field** toolbar icon or by selecting the **Merge Field** option on the **Insert** menu. This will display the **Merge Fields** window.
3. Select a field from the **Merge Fields** window to be inserted into your document then click on **Insert**. This will insert the selected field name into the current document and encase it in double brackets (e.g. <<First Name>>) to indicate that this is a merge field. Merge fields can also be inserted by simply double clicking in the **Merge Fields** window.
4. Repeat Step 3 as desired. Note that the **Merge Fields** window can be left open while editing the actual document.
5. Finish creating the current document then close the **Merge Fields** window.
6. Save the document using either the **Save** option or the **Save As** option on the **File** menu.
7. Select the desired recipients for this document using the **Select Recipients** option on the **File** menu or the corresponding toolbar icon.
8. Preview or print the document using the **Preview** or **Print** option on the **File** menu or the corresponding toolbar icons.

Signature - Saving and Inserting

To save your personal signature for use in the **Letters** window just do the following:

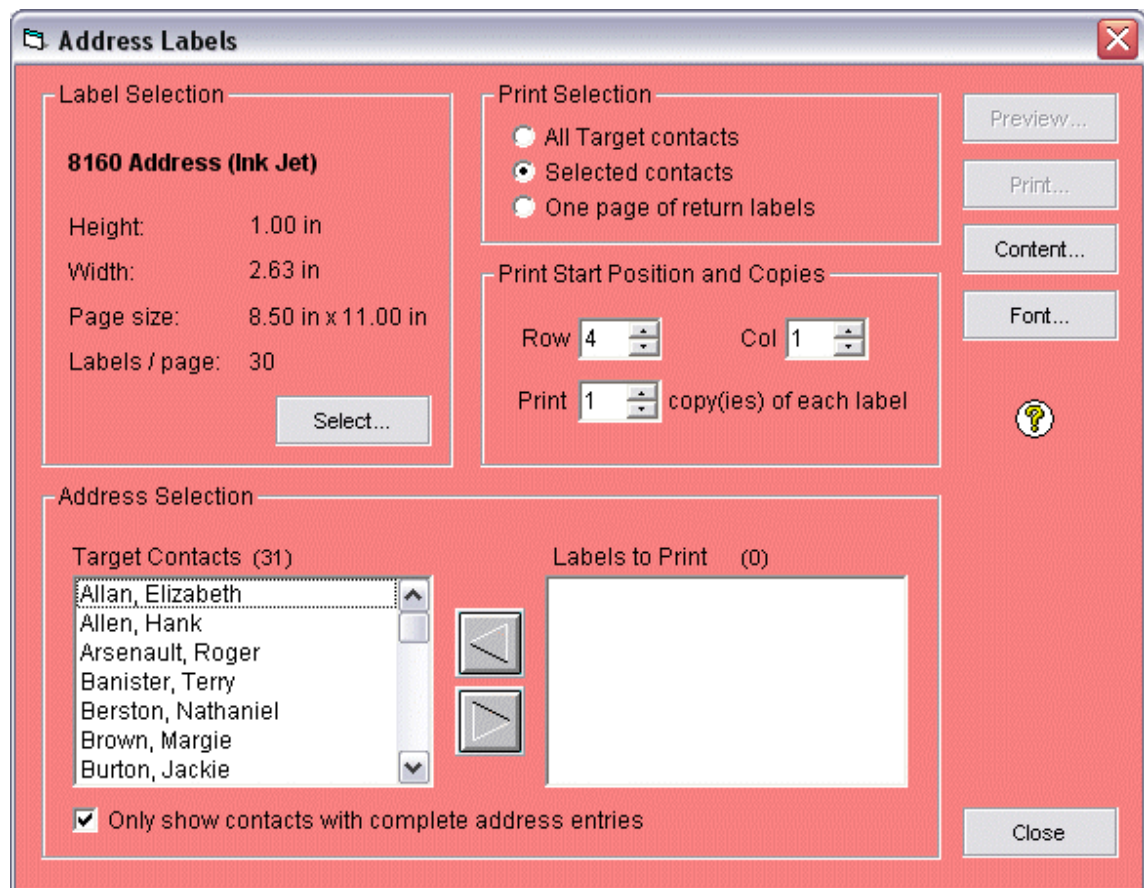
1. Enter and format the text you would like to save as your signature in the message section of the **Letters** window.
2. Click on the **Save Selection as Signature** option on the **File** menu.

To insert your personal signature into a document either:

- Click on the **Signature** option on the **Insert** menu OR
- Click on the "pen" icon on the message toolbar

5.2.19 Mailing Labels

The **Labels** function on the **Contacts** screen allows you to easily merge information for any filterable, searchable or selectable contact group onto any type of standard or custom mailing label. The list of contact names included in the **Target Contacts** box in the **Address Labels** window, always reflects the most recent **Filter**, **Search** and **Select** results.



Tip: To edit a label's margins or to change the position of text on a predefined or custom label click on **Select**, then click on **Edit** to open the **Edit Label** window. Only the top and left margin settings can be changed for predefined labels. All changes made to margin settings will be remembered for future use.

To print labels for some or all of your current "Target" contacts, or to print return address labels, do the following:

1. Select a label to use for printing by clicking on the **Select** button and choosing a label from the predefined list. If you need to create a [custom label](#) you can do so by clicking on the **New** button in the **Select Label** window.
2. Select a label printing option using the **Print Selection** option buttons in the upper middle section of the **Address Labels** window. Choose the **All Target contacts** option to print labels for all of the currently filtered, searched or selected names listed in the **Target Contacts** box. Choose the **Selected contacts** option if you want to manually select from the names listed in the **Target Contacts** box. Choose the **One page of return labels** option to print a sheet of return address labels using one selected contact (this option requires that you enter yourself as a contact on the **Contacts** screen).
3. If you chose to select contacts manually in Step 1, select the desired name or names in the **Target Contacts** box. Holding down the **CTRL** key or the **SHIFT** key while selecting names allows you to make multiple selections. Double clicking, or clicking on the right-pointing arrow moves the selected names over to the **Labels to Print** box on the right.
4. Select a **Row** and **Col** to begin printing at if you are using a partially used sheet of labels. For a new sheet, just set **Row** and **Col** both equal to 1. The program will remember your last **Row** and

Col entries, and will automatically calculate the correct next setting for these entries every time you print, based on the currently selected label and the number of labels printed.

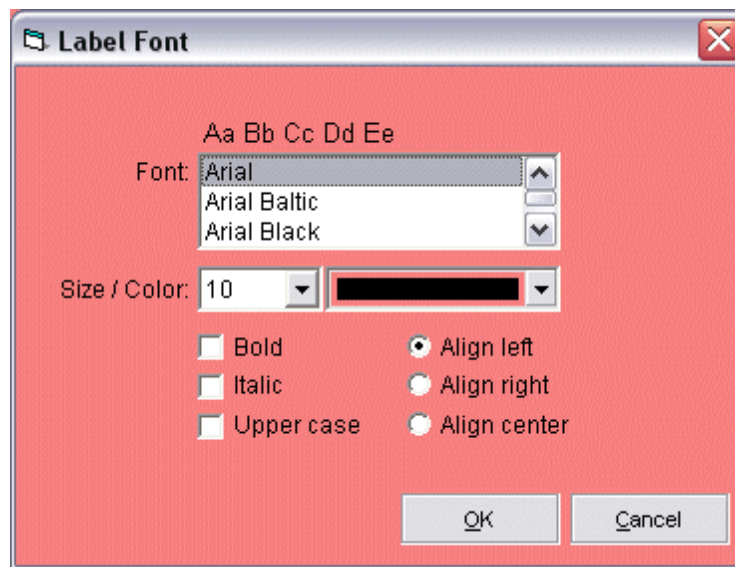
5. To modify the **Content** or the layout of the content on the label, click on the **Content** button to display the **Label Content** window, then select the contact fields you wish to print in the order and position you wish them to be printed. **Salutations** and **Middle Initials** are automatically combined with a first name anytime the **First name** field is selected. Selecting the **First name (addl)** field in the box immediately to the right of a field containing **First name** results in an " and " being added between the two fields, so that "Bob" and "Carol" becomes "Bob and Carol" when the label is previewed or printed. The **Header** and **Footer** entry boxes in the **Content** window will only be available if the size of the currently selected label allows room for a header and footer to be printed. The number of content rows available is also dependent on the size of the currently selected label.

Line #	1st Field	2nd Field	3rd Field
1	First Name	Last Name	
2	Address 1		
3	Address 2		
4	City	State	Postal Code ▼
5			
6			

☐ Prepend 'Mr. and Mrs.' to each label

OK Cancel

6. To modify the **Font** used to print the label, click on the **Font** button to display the **Label Font** window, then specify the font characteristics you would like to use.



7. Click on **Preview** or **Print** to view or print your labels.

Tip: If the text on your labels is not positioned where you would like it to be, just do this:

1. Click on **Select** from the main **Address Labels** window.
2. Click on **Edit** in the **Select Label** window.
3. Adjust the left and top margin values.
4. Try printing again on a sheet of paper to check alignment.
5. The actual left and top margin values are not important and will vary from one printer to another. Just adjust the values until the label text is positioned the way you would like it. Once they're set correctly, the program will remember your entries and you should not need to adjust them again.

5.2.20 Custom Labels

Edit Label

☒ Portrait ☐ Landscape

Description: 8160 Address (Ink Jet)

Labels Across: 3

Labels Down: 10

Measurement units: in

Graphic area showing label dimensions and layout:

- Top margin: 0.4
- Left margin: 0.5
- Label height: 1
- Label width: 2.625
- Right margin: 0
- Bottom margin: 0.125
- Label spacing: 0

Buttons: OK, Cancel

Custom labels can be created and edited as follows.

1. Click on the **Labels** button on the **Contacts** screen to open the **Address Labels** window.
2. Click on the **Select** button in the **Address Labels** window to open the **Select Label** window.
3. Click on **New** to create a new custom label or **Edit** to edit a previously saved custom label.
4. Select the page orientation and enter a name to describe the custom label, if a new one is being created.
5. Enter the number of labels across and down on a single page.
6. Enter the dimensions that define the label and its position on the page, using the yellow, numeric, entry boxes, in the graphic part of the **Edit Labels** window. If appropriate, you may set some of the dimensional entries to zero ("0.0").
7. Click on **OK** to save your entries.

5.2.21 Custom Contact Fields



The **Contacts** screen includes four custom fields which you can name as you choose. These fields can be handy for keeping track of a contact's hobby, kids' names, favorite food, or other "personal touch" information. To change the name for one or more of these fields, simply click on the name to open the **Custom Fields** window for editing. All of your contact listings and all of your active businesses share the same names for these four custom fields.

5.2.22 Follow-Up Schedules

The **Schedule** boxes on the **Contacts** screen allows you to assign one or two pre-defined activity schedules to each of your contacts. To assign a **Schedule** to one of your contacts, first select that person, then select the **Schedule** you would like to assign, adjust the **Start Date** if necessary, and finally click on **Save**. Schedules can also be assigned to entire groups using the [Change](#) button on the **Contacts** screen (this method will always set the first **Schedule** box on the **Contacts** screen for each contact that is affected).

Creating and assigning [Schedules](#) is a great way to standardize and automate many of your basic follow-up activities. Appointments and tasks that get created when a **Schedule** is assigned appear on the **Calendar** and **Tasks** screens just like appointments and tasks that are manually entered in the program. If a scheduled appointment or task is the next activity of its type associated with a contact, it will also appear in the next appointment and task area on the **Notes** tab of the **Contacts** screen. You can quickly see a list of all future activities (scheduled and manually-entered) for the currently selected contact by clicking on the binoculars icon directly to the right of the **Schedule / Start Date** box on the **Contacts** screen.

Schedules are defined using the [Schedules](#) button on the **Contacts** screen. This window can also be opened, by clicking directly on the **Schedule / Start Date** label on the **Edit Contacts** screen.

Tip : When a **Schedule** is assigned to one or more of your contacts the activities are scheduled immediately. Subsequent changes made to the **Schedule**, including deactivating activities or deleting the entire schedule, do not affect previously scheduled activities, however, changes made to scheduled emails that have not yet been sent out will be reflected in the emails when they are sent.

5.2.23 Creating Schedules

Schedules are defined using the **Schedules** button on the **Contacts** screen. This window can also be

displayed by clicking on the **Schedule / Start Date** label in the lower left-hand corner of the **Edit Contacts** screen. Either of these options opens the **Follow-Up Schedules** window.

	Active	Type	Interval	Units	Msg / File
1	☒	Task	-3	Week(s)	Send information pack to host
2	☒	Email	-2	Week(s)	D:\VB6_Proj\Kynetics\EM100\Email\Scheduled\Hostess Information Pack Followup.htm
3	☒	Email	-1	Week(s)	D:\VB6_Proj\Kynetics\EM100\Email\Scheduled\One Week Reminder.htm
4	☒	Task	-2	Day(s)	Call to finalize party details, get directions, outside orders, etc.
5	☒	Appt	0	Day(s)	PARTY!
6	☒	Email	1	Day(s)	D:\VB6_Proj\Kynetics\EM100\Email\Scheduled\Thank You After Party.htm
7	☒	Email	1	Week(s)	D:\VB6_Proj\Kynetics\EM100\Email\Scheduled\Additional Party Orders.htm
8	☒	Task	2	Week(s)	Followup call to finalize party
9	☐	Appt	1	Day(s)	

To create a new activity schedule in the **Follow-Up Schedules** window just do the following.

1. Click on **New**.
2. Enter a name for the schedule in the **Name** box.
3. Check the first **Active** box to set the first activity.
4. Select the activity **Type** (Appt, Email or Task).
5. Specify the **Interval** and **Units** to wait before this activity is to occur. All intervals are evaluated with reference to the **Schedule Start Date** that you set when you assign the **Schedule** to one of your contacts. For example, setting an interval to "2 week(s)", means that the activity will be scheduled for exactly two weeks *after* the **Schedule Start Date**. Setting an interval to "-2 week(s)", means that the activity will be scheduled for exactly two weeks *before* the **Schedule Start Date**.
6. If the scheduled activity is an appointment or a task, enter a message in the **Msg** box to be displayed on the **Calendar** or **Tasks** screen. If the scheduled activity is an email, click on the link in the **Msg** box to open the **Email** window allowing you to select or create the email you would like to make part of this Schedule. Email files that include merge fields, will have the individual contact's personal information automatically inserted into the text prior to the scheduled email being sent.
7. Repeat Steps 3 - 6 as desired. Each **Schedule** can include up to 25 activities.
8. Click on **Save** to save the **Schedule** your changes. The **Schedule** name will now be available from the **Contacts** screen and from the **Contact Group Changes** window, for assignment to any of your contacts.

Tip: Scheduled appointments are always set for 9:00 AM and are automatically set to alarm 15 minutes prior to the appointment time. All future appointments, tasks and scheduled emails for any of your contact listings can be viewed in the **Activities** window, which can be displayed by clicking on the small, binoculars icon immediately to the right of the **Schedule** boxes on the **Contacts** screen.

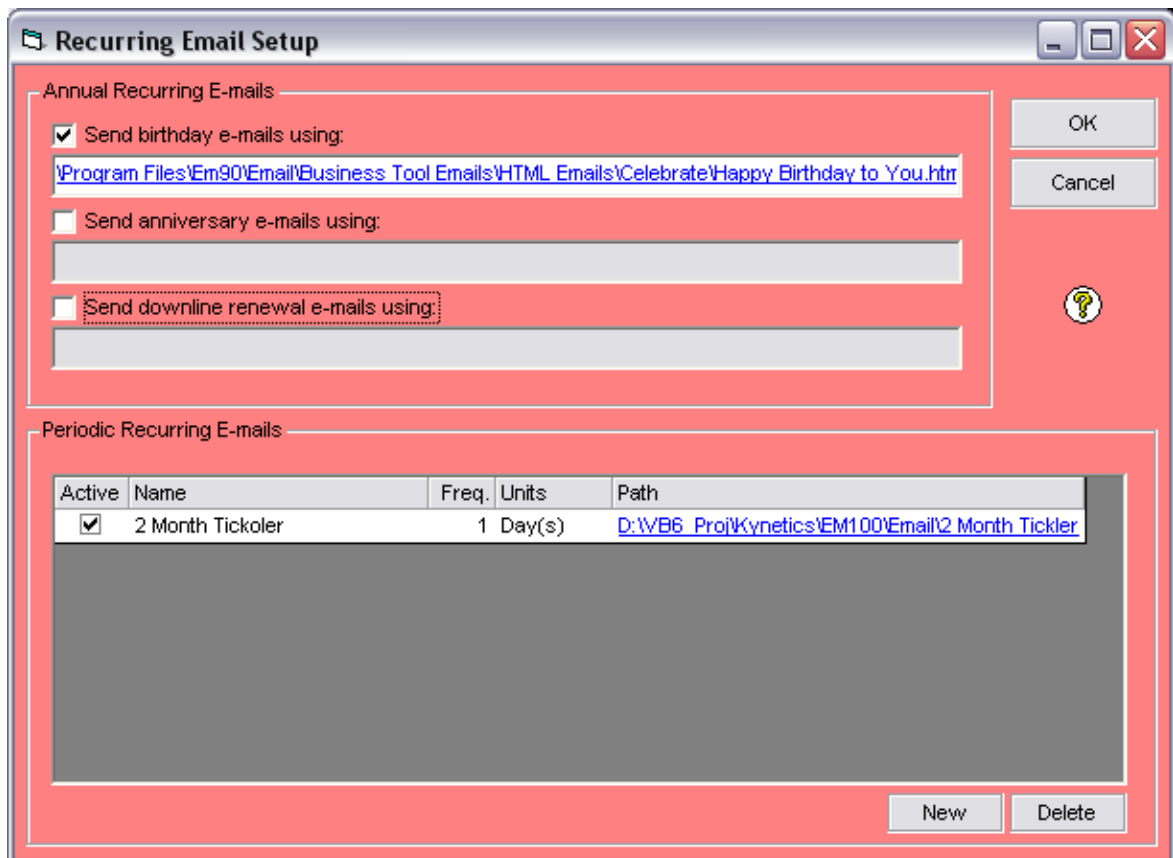
Tip: When you assign a schedule containing emails the program only stores the path to the scheduled emails and not the actual emails themselves. This means that any changes you make to emails that have already been scheduled to be sent, will be included in those emails when they're actually sent.

5.2.24 Recurring Emails

The recurring email function in the program allows you to have emails automatically sent to people in your contact database on a recurring basis. **Annual Recurring Emails** are emails that are sent once a year for birthdays, anniversaries or to remind a member of your team that it's time to renew.

Periodic Recurring Emails are emails that are sent out at intervals you specify for a variety of purposes, such as reminding customers to reorder or just maintaining contact with someone on a regular basis.

Recurring emails are set up using **Recurring** button the **Contacts** screen or by clicking on the **Birthday / Anniv.** label on the **Edit Contacts** screen. The **Recurring Email Setup** window is separated into two sections, one for **Annual Recurring Emails** and one for **Periodic Recurring Emails**.



The image shows a screenshot of the "Recurring Email Setup" window. The window has a title bar with the text "Recurring Email Setup" and standard window controls (minimize, maximize, close). The window is divided into two main sections: "Annual Recurring E-mails" and "Periodic Recurring E-mails".

Annual Recurring E-mails section:

- There is a checkbox labeled "Send birthday e-mails using:" which is checked. Below it is a text field containing the path: "Program Files\Em90\Email\Business Tool Emails\HTML Emails\Celebrate\Happy Birthday to You.htm".
- There is a checkbox labeled "Send anniversary e-mails using:" which is unchecked. Below it is an empty text field.
- There is a checkbox labeled "Send downline renewal e-mails using:" which is unchecked. Below it is an empty text field.

Periodic Recurring E-mails section:

This section contains a table with the following columns: Active, Name, Freq., Units, and Path.

Active	Name	Freq.	Units	Path
☒	2 Month Tickler	1	Day(s)	D:\WB6_Proj\Kynetics\EM100\Email\2 Month Tickler

Below the table is a large empty rectangular area. At the bottom right of the window, there are two buttons: "New" and "Delete". On the right side of the window, there are "OK" and "Cancel" buttons, and a help icon (a question mark inside a circle).

Annual Recurring Emails

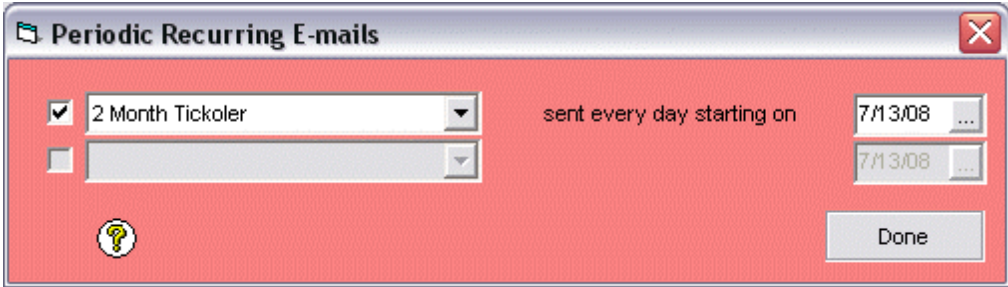
To set up **Annual Recurring Emails** for birthdays, anniversaries or team renewals just do this:

1. Click on one of the three checkboxes to activate a specific type of annual email.
2. Click on the link in the box immediately below the checkbox to open the **Email** window allowing you to select or create the email you would like to use for this purpose.
3. Repeat Steps 1 – 2 for any other **Annual Recurring Emails** you would like to set up.
4. Click on **OK** to save the changes you have made. If you are setting up an annual email for reminding your team members to renew, then you are finished. Just make sure that your team members have a valid date entered in the **Renew** box on the **Contacts** screen for the program to use in determining when to send the email. If you are setting up a birthday or anniversary email, continue with the next step.
5. On the **Edit Contacts** screen, select a contact you would like to send this annual email to. Make sure that the selected contact has an email address and that you have entered a **Birthday** or **Anniversary** date, depending on which type of annual email you are trying to set up.
6. Click on the checkbox next to the **Birthday** or **Anniversary** entry box to indicate that you would like to have your annual email sent to this person. If you have not set up either a birthday or anniversary annual email the checkbox next to that field will be disabled (grayed out).
7. Click on the **Save** button on the **Edit Contacts** screen to save your changes and assign the emails. You can confirm that the first annual email of each type has been scheduled by clicking on the "binoculars" icon next to the **Schedule / Start** entry boxes.

Periodic Recurring Emails

To set up **Periodic Recurring Emails** for whatever purpose you choose using the **Recurring Email Setup** window, just do this:

1. Click on **New**.
2. Enter a name to be used to identify this periodic email.
3. Set the **Freq(uency)** and **Units** specifying how often you would like the email to be sent out.
4. Click on the link in the **Path** field to open the **Email** window allowing you to select or create the email you would like to use for this purpose.
5. Click on **OK** to save your changes.
6. On the **Edit Contacts** screen, select a contact you would like to have this periodic email sent to. Make sure that the selected contact has an email address.
7. Click on the "envelopes" icon to the right of the **Anniversary** entry box on the **Edit Contacts** screen to display the **Periodic Recurring Emails** window.



8. Click on one of the two checkboxes to activate a periodic email and select the email you would like to have sent from the adjacent box.

9. Enter a date to begin sending the email either by typing or using the ellipsis button at the right of the date box to display the pop-up calendar.
10. Click on **Done**.
11. Click on **Save** to save the changes to this contact's information.

The "envelopes" icon to the right of the **Anniversary** entry box will change to green whenever a contact that has a recurring email activated is selected. The **Periodic Recurring Emails** window can be left open while scrolling through your contact listings if desired. The window will update automatically whenever you switch from one contact to another.

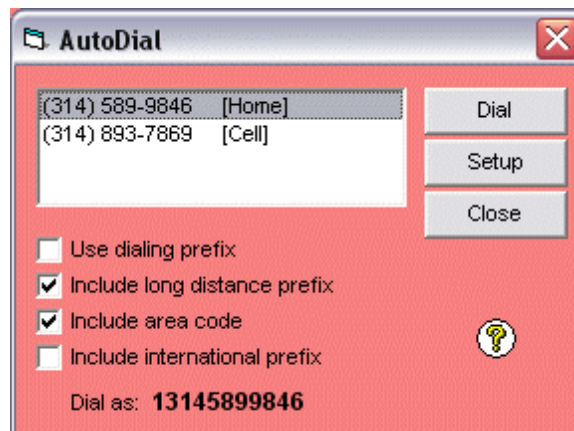
Deactivating recurring emails

Annual Recurring Emails and **Periodic Recurring Emails** can be temporarily deactivated by unchecking the appropriate box in the **Recurring Email Setup** window. The emails will remain assigned to those contacts to whom you have already assigned them so that reactivating the email(s) will automatically resume the sending process. If you have deactivated a periodic email it will appear in red when you click on the **Periodic Recurring Emails** window for a specific contact to whom it has been assigned.

Recurring emails are sent out at the same time that "scheduled" emails are sent out, which is typically the first time the program is opened each day, assuming that the "Check for scheduled emails at startup" option is selected using the **Preferences** option on the **Settings** menu. You can manually request that the program check for recurring and scheduled emails that are due by clicking on the **Scheduled** button in the lower right corner of the **Email History** window.

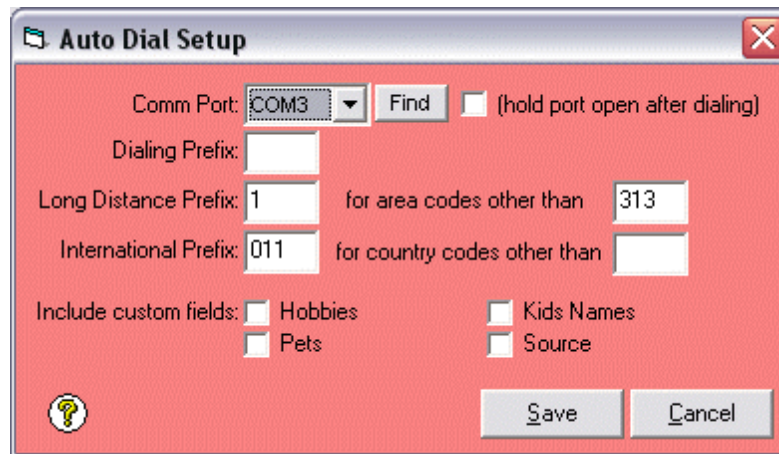
5.2.25 Auto Dialing

The **Dial** button on the **Contacts** screen displays the **Auto Dial** window, allowing you to select a telephone number to be automatically dialed. Auto dialing must be configured prior to dialing using the **Contacts - Auto Dial** option on the **Settings** menu or by clicking on **Setup** from the **Auto Dial** window.



Auto Dial Setup

The **Auto Dial Setup** window allows you to save the following settings:



Comm Port: Select the hardware port assignment that your modem is assigned to on your computer

Find: Causes the program to search for a modem installed on your computer

Hold open ...: Tells the program not to disengage itself after dialing. If this box is not checked, the software will automatically "hang up" a few seconds after dialing the number. As long as you have picked up a regular telephone before this happens, the call is continued. This feature is generally only required if you are using a speakerphone that's actually built into your computer.

Dialing Prefix: Enter the number you have to dial to get an outside line (if any).

Long Distance Prefix: Enter the number you have to dial before dialing a long distance number (typically "1"). Also enter the area code from which you will be placing calls.

International Prefix: Enter the number you have to dial before dialing an international number (typically "011"). Also enter the country code from which you will be placing calls.

Include Custom Fields: Checking any of these checkboxes tells the program that you are using the associated fields to keep track of extra phone numbers, causing these fields to be included in the list of selectable phone numbers in the **Auto Dial** window.

Automatic Notes Updating

The **Preferences** window (**Preferences** option on the **Settings** menu) has an option that reads "Enter phone calls in Contact Notes". When this option is selected, an entry is made into a contact's **Notes** field any time you use the **Auto Dial** window to dial that contact's phone number.

5.2.26 Contact Notes

Edit Contacts

Target: 41 Total: 41

Contact: (Since Feb 5, 2006)

2/5/08 - Spoke briefly with Elizabeth today and she's very excited. She's tired of her corporate job is looking for something that will give her more flexibility in when and where she works.

2/9/08 - Liz loves the products and wants to know more about the marketing plan. Call her for lunch next Wednesday.

2/12/08 - It's About Time video

2/16/08 - Had lunch today. She's ready to sign up and wants to get trained as quickly as possible.

3/1/08 - Business presentation

Date Products Templates

Next Appt: 7/10/08 at 1:00 PM Business presentation New Edit Del

Next Task: ----- 3/6/08 1 month reorder call New Edit Del

Events Options Print New Save Cancel

The **Notes** tab on the **Edit Contacts** screen allows you to keep a detailed history of meetings and conversations between you and your contacts. The **Date** button provides a quick way to insert a date into the **Notes** box. The **Products** buttons allow you to click-enter and product descriptions into a contact's **Notes**.

The **Templates** button on the **Notes** tab displays the **Templates** window, where you can access saved templates or create new ones. **Templates** are pieces of saved text that can be recalled and entered into a contact's **Notes** without you having to re-type them each time. If you have a set of questions or topics you like to regularly discuss with your customers or downline, you can put them into a template so that they can be easily entered into a person's **Notes** whenever you need them.

The program has the capability to make automatic **Notes** entries every time you complete an appointment or task, use the auto-dialer, send an email or print a label. These options are available via the **Preferences** window, which can be accessed using the **Preferences** option on the **Settings** menu.

If you would prefer to have your most recent notes show up at the top of the **Notes** window, click on the **Options** button on the **Edit Contacts** screen and select the option to "Use reverse scrolling when entering Notes".

When you finish making entries in the **Notes** box for a contact, be sure and set a follow-up task or appointment using the buttons provided at the bottom of the **Notes** tab on the **Edit Contacts** screen.

The **Notes** field allows a maximum of 8000 characters for each of your contacts.

5.2.27 Contact Profiles

(Only available in specific custom editions)

The **Profile** tab on the **Contacts** screen allows you to track client responses to pre-loaded questions and to print or email product recommendations based on those responses. This view is only available in certain custom editions of the program. All of the choices offered on this screen are "pre-configured" and cannot be changed.

The **Profile** tab consists of five selection boxes, two lists of checkboxes and a **Recommended Products** display box. Making selections or checking off items will modify the list of **Recommended Products** to the extent that these relationships have been pre-programmed into the custom pre-load file for your company.

The **Blank Form** option on the **Profile** tab allows you email or print "blank" forms for your clients. When your client returns the filled-out form to you enter their responses into the appropriate areas for to refer to and for product recommendations.

The **Completed Profile** option on the **Profile** tab allows you to print out the selected customer's profile or to email it directly to them.

Clicking on the **Email** button on the **Profile** tab displays the **Email** window and automatically opens

a preloaded template that includes the merge field "<<Profile Info>>". This template can be modified and resaved. As long as you do not change the name or location under which the template is saved, any changes you make to it will be reflected in the template each time you click on **Email** from the **Profile** tab.

You can also merge "Profile Info" into any other email you create, including emails that are included in a **Schedule**.

5.2.28 Ranking Contacts

The **Rank** tab on the **Contacts** screen allows you to define sets of criteria that you have found to be characteristic of successful people, and then rank each of your prospects and / or team members against those criteria to identify likely business builders. For example, you might want to rank prospects on their entrepreneurial strength or on their ability to get along with different types of people.

Target: 41 Total: 41
Contact: Allen, Elizabeth (Since Feb 5, 2006)

Criteria	Comment	Rank
Entrepreneurial qualities	No previous business experience	7
Desire to quit JOB	Very outgoing!	9
Product benefit	Motivated but not overly confident	8
Family support	Lots of energy	8
People skills		
(Click to edit)		
(Click to edit)		
(Click to edit)		
Group: Customer		Total: 32

Events Options Print New Save Cancel

A different set of ranking criteria can be defined for each of your **Group** categories. To set **Rank** criteria for one of your contact **Groups**, do the following:

1. Select the **Group** you want to create **Rank** criteria for in the **Primary Group** box on the **Contacts** screen. You can also simply select a contact listing that has the desired **Primary Group** if you choose.
2. Click on the **Rank** tab.
3. Click on one of the **Criteria** labels and enter ranking criteria in the pop-up window.
4. Click on **Save** to save your entries and close the pop-up window.
5. Repeat for additional criteria as appropriate.

The currently selected contact does not need to be saved or resaved in order to save the **Rank** criteria associated with the selected **Group**. Any time you select a contact or enter a new contact using this **Group**, the criteria you have just entered will show on the **Rank** tab of the **Edit Contacts** screen, allowing you to individually **Rank** each person in this **Group** against the same set of criteria. Your contact database can then be [filtered](#) by Rank, making it easy to stay in regular contact with your most promising people.

5.2.29 Contact Status

Step	Comment	Date
☒ Introductory tape	Likes the products!	2/6/2008
☒ 3-way call		3/10/2008
☒ Marketing presentation	Liz is ready to get started.	3/26/2008
☐ Product preview		
☐ Product trial		
☐ Sign up		
☐ Goal identification		
☐ (Click to edit)		

Group: Customer

The **Process** tab on the **Contacts** screen allows you to define sets of steps that different groups of contacts typically go through, and then keep track of each contact's status in their respective process. For example, a process might involve having someone attend a party, lending them a product, and then giving them a business presentation..

A different set of process steps can be defined for each of your **Group** categories. To set a **Process** step for one of your contact **Groups**, do the following:

1. Select the **Group** you want to create **Process** steps for in the **Primary Group** box on the **Contacts** screen. You can also simply select a contact listing that has the desired **Primary Group** if you choose.
2. Click on the **Process** tab.
3. Click on one of the **Criteria** labels and enter a **Process** step in the pop-up window.
4. Click on **Save** to save your entry and close the pop-up window.
5. Repeat for additional steps as appropriate.

The currently selected contact does not need to be saved or resaved in order to save the **Process** steps associated with the selected **Group** category.

Any time you select a contact or enter a new contact using this **Group**, the steps you have just entered will show on the **Process** tab of the **Edit Contacts** screen, allowing you to individually track each person in this **Group** against the same set of **Process** steps. Your contact database can then be [filtered](#) by **Process** status, allowing you to quickly identify and communicate with people who have or have not yet completed a particular step in their process.

5.2.30 Follow-up

☐ Viewing or Editing a Contact's Next Appointment and Task

Immediately below the **Notes** box on the **Notes** tab of the **Contacts** screen, you will see displayed the next appointment and task you have scheduled with the selected contact. Using the **New**, **Edit** and **Del** buttons provided, you can easily create a new appointment or task or edit the next scheduled one. This allows you to set a follow-up action immediately after talking with a prospect and updating their notes, and without having to switch to the **Calendar** or **Tasks** screen.

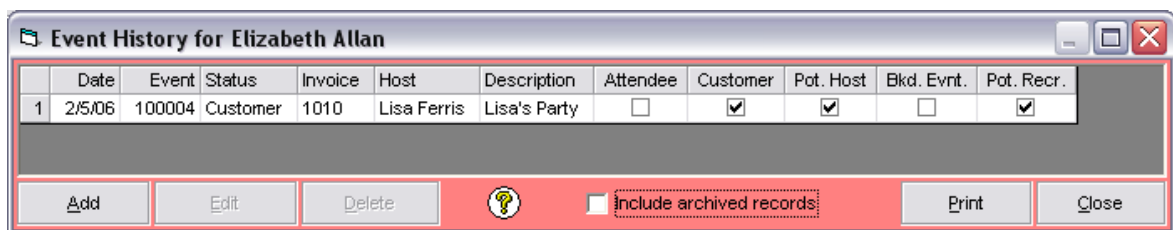
☐ Viewing or Editing All of a Contact's Appointments, Tasks and Scheduled Emails

A list of appointments, emails and tasks for each of your contacts is available via the "binoculars" icon on the **Listing** tab of the **Edit Contacts** screen. This list includes both scheduled and manually entered activities, all of which can be edited or deleted by right clicking in the **Activities** window. Appointments and tasks can be created, edited or deleted from this window by right clicking and selecting from the context menu. Scheduled emails can be deleted but not created or edited from this window by right clicking.

☐ Viewing or Editing All of Your Appointments, Tasks and Scheduled Emails (Professional Editions only)

A list of appointments, emails and tasks for all of your contacts is available via the **Activities** button on the **Contacts** screen. This list includes both scheduled and manually entered activities, all of which can be edited or deleted by right clicking in the **Activities** window. Appointments and tasks can be created, edited or deleted from this window by right clicking and selecting from the context menu. Scheduled emails can be deleted but not created or edited from this window by right clicking.

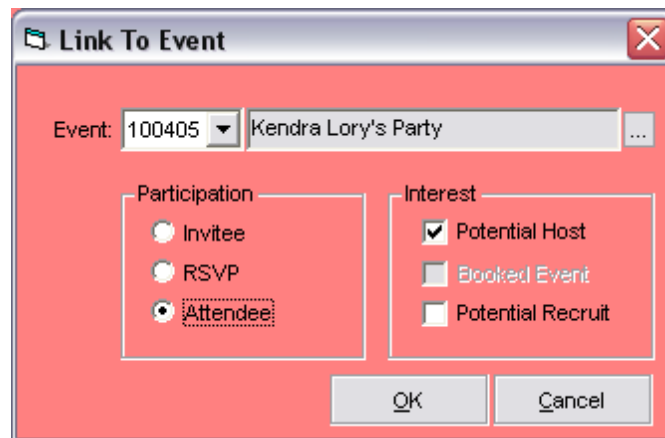
5.2.31 Event History



The **Event History** window is displayed by clicking on the firecracker icon to the right of the **Last**

Event and **Next Event** boxes on the **Edit Contacts** screen. This window lists all of the Events with which this contact has been associated. If you have previously archived data using the [Archive Data](#) option on the **File** menu, there will be a checkbox in the window allowing you to include those archived records if you choose.

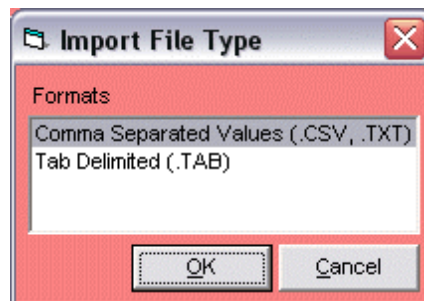
In most cases, a contact becomes associated or "linked" to an Event when you enter what they bought on the **Edit Sales** screen and select an **Event** to link the sale to. However, you can also add someone to an Event by clicking on the **Add** button in the **Event History** window to display the **Link To Event** window. Adding a person to an Event in this manner enables all of the same filtering and reporting options that are available when they are linked via the **Edit Sales** screen. Contacts can also be linked to an Event by editing the Event and adding them to the list of "Invitees / Attendees".



5.2.32 Importing Contacts

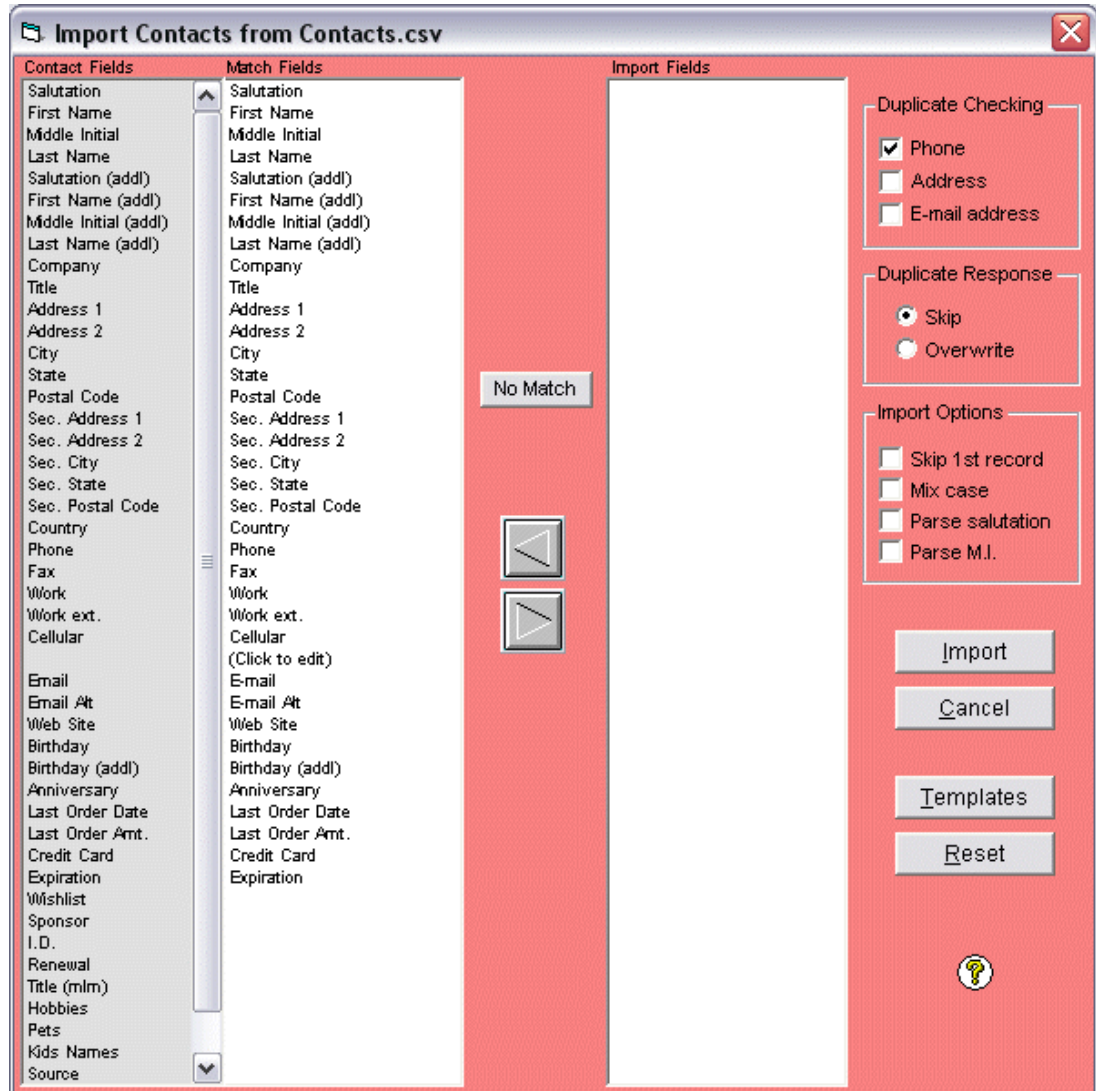
The program can import contact information in either comma-delimited or tab-delimited format. To import a file containing data formatted in one of these two manners do the following:

1. Select the **Import** option from the **File** menu.
2. Select the appropriate format in the **Import File Type** window and click **OK**.

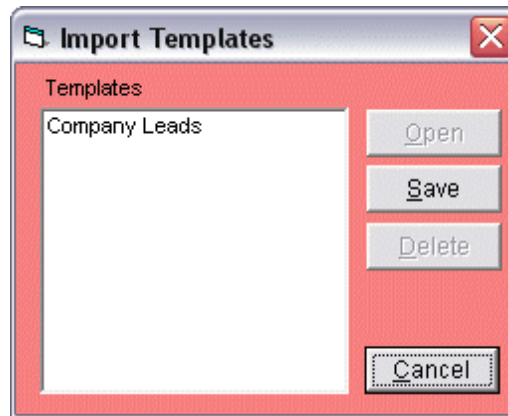


3. Select the file to be imported from the **File Open** window.

4. Click on **Open** to display the **Import Contacts** window where you will match the fields in the import file to their counterparts in Consultant Front Office.



5. If you have previously saved a **Template** that matches the "structure" of the file being imported, you can use the template to match up the fields in the import file with their counterparts in Consultant Front Office. To do this, click on the **Templates** button, then select the template from the **Import Templates** window and click on **Open**.



6. If you have not previously created a **Template** for this type of file, match the fields in the **Import Fields** box with their counterparts in the **Contact Fields** box. If the **Import Fields** box contains heading information for the various fields in the import file, this process is usually straightforward. If the **Import Fields** box contains only actual contact information (e.g. "John", "Smith", "123 Oak St." instead of "First Name", "Last Name", Address" etc.) then you will have to carefully determine which piece of information is to be put into each Consultant Front Office **Contact Field**.
7. To match the fields in the **Import Fields** box to those in the **Contact Fields** box, do the following:
 - 7.a. Look in the **Contact Fields** window for the first unmatched field (e.g. "First Name").
 - 7.b. Look in the **Import Fields** window for the entry that contains the information for this **Contact Field** and either double click on it, or click once on it and then click on the left arrow, to move that entry into the **Match Fields** box immediately across from its corresponding **Contact Field**.
 - 7.c. If one or more of the fields in the **Contact Fields** box does not have a matching entry in the **Import Fields** box, use the **No Match** button to fill the spot immediately across from this **Contact Field** in the **Match Fields** box. When this step is complete, the contents of the **Match Fields** box should be immediately adjacent to their **Contact Fields** counterparts.
8. **Duplicate Checking:** Selections made in the **Duplicate Checking** section of the **Import** window instruct the program which fields to check in determining whether an entry in the file being imported already exists in your contact database. An exact phone or address match, if those options are selected, will prevent a record from being imported. The number of rejected duplicates will be reported when importing is completed.
9. **Duplicate Response:** Allows you to specify what action should be taken when a duplicate contact is identified in the import file. Selecting the **Skip** option causes the program to ignore duplicate entries completely. Selecting the **Overwrite** option causes the program to overwrite the entries it currently has for that person with the information in the import file. The number of duplicate entries skipped or overwritten will be reported once importing is completed. A list containing the names of all duplicate entries is also written to your Windows Desktop after importing and placed in a file called "Duplicates.txt".
10. **Import Options:** Selections made in the **Import Options** section of the **Import** window allow you to control how the information in the import file is processed during importing as follows:
 - 10.a. **Skip first record:** Instructs the program to skip the first record in the import file. Select this

option if the file being imported contains field headings.

- 10.b. **Mix case:** Instructs the program to impose normal capitalization on the entries being imported.
- 10.c. **Parse salutation:** Instructs the program to search for salutations (e.g. Mr., Mrs. etc.) in the first name entries being imported. If a salutation is found, it is imported into the **Salutation** field during importing. The **Match Field** entry adjacent to the **Salutation Contact Field** is ignored when this option is selected.
- 10.d. **Parse M.I.:** Instructs the program to search for middle initials in the first name entries being imported. If a middle initial is found, it is imported into the **Middle Initial** field during importing. The **Match Field** entry adjacent to the **Middle Initial Contact Field** is ignored when this option is selected.
- 11. If you would like to save your **Match Field** settings for future use with import files having an identical structure, click on the **Templates** button, then on **Save**, then enter a name in the **Save As** box and click on **Save**.
- 12. Click on **Import**. The program will display a progress meter and will confirm the number of imported and rejected listings when importing is completed.



All imported contacts are given a primary **Group** of **Import**.

You can easily change the primary **Group** for all imported listings using **Contacts** option on the **Categories** menu. You can also change the primary **Group** for all imported listings using the **Change** button on the **Contacts** screen. The **Change** button on the **Contacts** screen can also be used to undo the results of an import operation by deleting all listings that have **Import** as their **Primary Group**.

5.2.33 Exporting Contacts

The program can export contact information in comma-delimited format (CSV) to a file specified by you, using the [Export - Contacts](#) option on the **File** menu. Exporting always reflects the results of your most recent **Filter**, **Search** and **Select** operations, allowing you to selectively export any filterable or searchable group of contacts..

The program can also export just email information in comma-delimited format (TXT) to a file specified by you, using the [Export - Email List](#) option on the **File** menu. This function is specifically designed

to create files for uploading to Internet-based mailing programs. The export file contains each contact's name and email address, and is generally ready for uploading immediately after exporting.

5.3 Calendar

5.3.1 Overview

The **Calendar** section of the program is used to set, edit, view and print appointments. Appointments can be stand-alone or they can be linked to one of your contacts. Linking an appointment to one of your contacts allows you to print phone numbers and notes for that contact when you print a list of your appointments. Appointments that are created from the **Edit Contacts** screen are automatically linked to a contact when they are created.

5.3.2 View Options

Three views are available when you click on the **Calendar** button. You can change to a different view at any time, either by clicking on one of the **Daily**, **Weekly** or **Monthly** buttons in the upper left-hand corner of the screen, or by using the right-click menu.

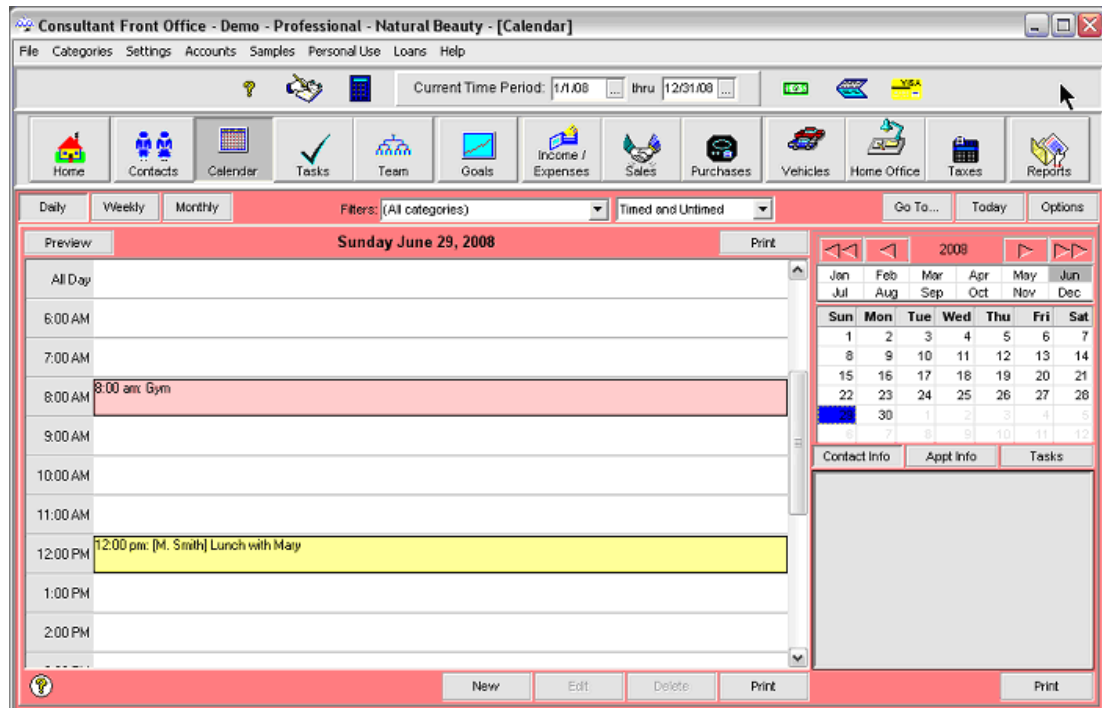
All three **Calendar** views are controlled by the selection in the **Filter** box at the top of the **Calendar** screen. The selection made in the **Filter** box specifies whether all of your appointments are displayed or only appointments with a specific **Category** setting. *If you are unable to find an appointment you've entered*, try setting the **Filter** box to "(All Categories)" to ensure the appointment is not being filtered based on its **Category** setting.

The **Daily**, **Weekly** and **Monthly** views all allow you to create, edit, delete, view and print appointments. New, edit and delete options are always available via right-click menus. Existing appointments can also be edited by simply double clicking on the appointment. Additionally, appointments can be created and edited in the **Daily** and **Weekly** views using the **New**, **Edit** and **Delete** buttons at the bottom of the screen. The **Calendar Options** window (**Options** button on the **Calendar** screen) has an option allowing you to choose to **Show start times only in Monthly view**, thus saving space and allowing more of the appointment message to be shown on the screen.

The **Daily**, **Weekly** and **Monthly** views all include **Preview** and **Print** buttons in the upper left and upper right corners of the screen, for previewing or printing the currently displayed appointments.

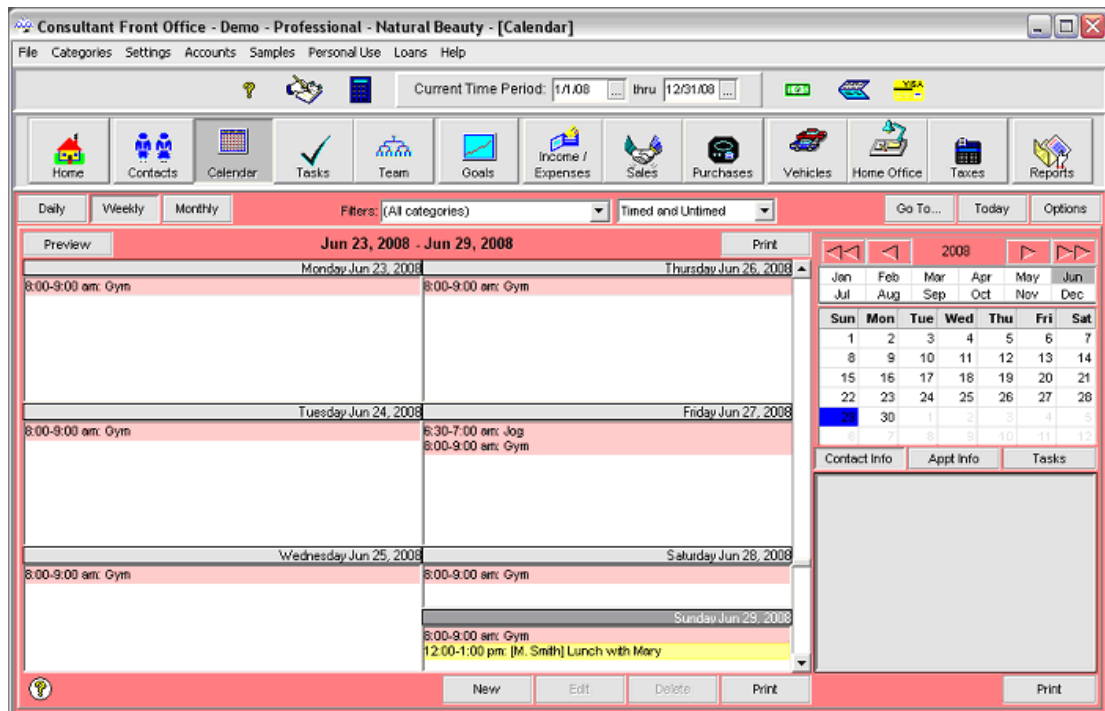
Daily View

The **Daily** view shows all of your appointments for a given day in a "Day-Timer" type display. Appointments that overlap or start within the same hour are shown side by side on the screen. Appointments that are scheduled for the selected day, but do not have a specific starting time, are shown in the **All Day** section at the top of the display. The gray box in the lower right hand corner of this view serves two purposes. If the **Contact Info** option is selected, the box displays the contact information for the person who is linked to the selected appointment (if any). If the **Appointment Notes** option is selected, the box displays any **Notes** that were entered when the appointment created or edited.



Weekly View

The **Weekly** view shows all of your appointments for the selected week. Appointments for each day are listed in chronological order. If more appointments exist for a given day then can fit into the available space, an ellipsis (...) will show in the caption bar for that day.



Monthly View

The **Monthly** view shows all of your appointments for the selected six-week time period. This display can be scrolled one week at a time. Appointments for each day are shown in chronological order. If more appointments exist for a given day than can fit into the available space, an ellipsis (...) will show in the caption bar for that day. Clicking on the ellipsis causes an extended window to become visible that displays all of your appointments for the selected day.

Consultant Front Office - Demo - Professional - Natural Beauty - [Calendar]

File Categories Settings Accounts Samples Personal Use Loans Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Daily Weekly Monthly Filters: (All categories) Timed and Untimed Go To... Today Options

Preview June 2008 - July 2008

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
15 8:00-9:00 am: Gym	16 8:00-9:00 am: Gym	17 8:00-9:00 am: Gym	18 8:00-9:00 am: Gym	19 8:00-9:00 am: Gym	20 8:00-9:00 am: Gym	21 8:00-9:00 am: Gym
22 8:00-9:00 am: Gym	23 8:00-9:00 am: Gym	24 8:00-9:00 am: Gym	25 8:00-9:00 am: Gym	26 8:00-9:00 am: Gym	27 8:00-9:00 am: Gym	28 8:00-9:00 am: Gym
29 8:00-9:00 am: Gym 12:00-1:00 pm: Lunch with	30 8:00-9:00 am: Gym	1 8:00-9:00 am: Gym	2 8:00-9:00 am: Gym	3 8:00-9:00 am: Gym	4 8:00-9:00 am: Gym	5 8:00-9:00 am: Gym
6 8:00-9:00 am: Gym	7 8:00-9:00 am: Gym	8 8:00-9:00 am: Gym	9 8:00-9:00 am: Gym	10 8:00-9:00 am: Gym	11 8:00-9:00 am: Gym	12 8:00-9:00 am: Gym
13 8:00-9:00 am: Gym	14 8:00-9:00 am: Gym	15 8:00-9:00 am: Gym	16 8:00-9:00 am: Gym	17 8:00-9:00 am: Gym	18 8:00-9:00 am: Gym	19 8:00-9:00 am: Gym
20 8:00-9:00 am: Gym	21 8:00-9:00 am: Gym	22 8:00-9:00 am: Gym	23 8:00-9:00 am: Gym	24 8:00-9:00 am: Gym	25 8:00-9:00 am: Gym	26 8:00-9:00 am: Gym

Right click to add, edit or delete

Filter the display on as many categories as you choose

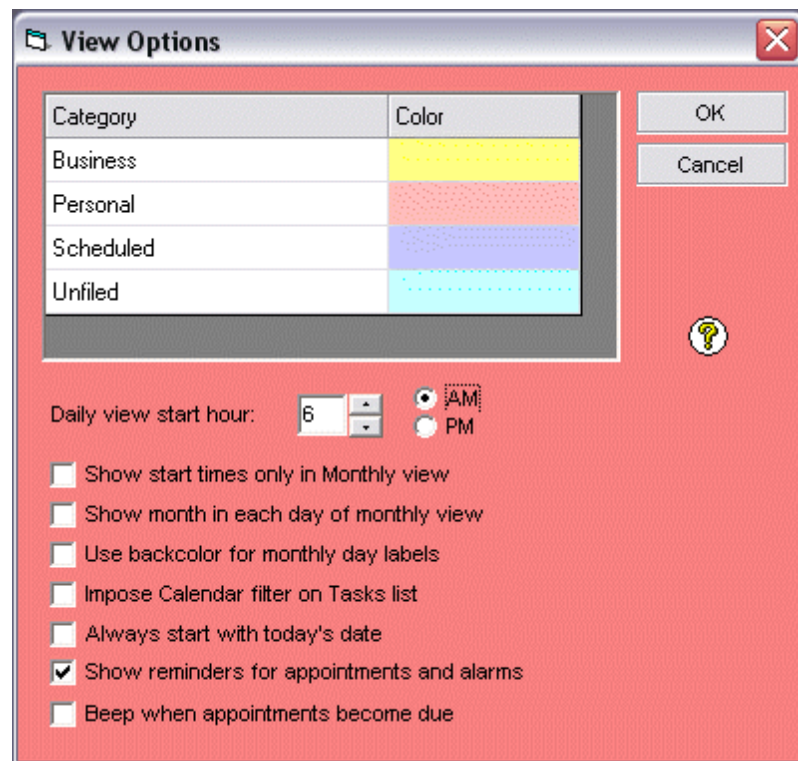
Scroll 1 year at a time

Scroll 1 month at a time

Pick a date

Show today

Display and reminder configuration options



Clicking on the **Options** button on the **Calendar** screen displays the **View Options** window allowing you to select from the following display options.

Category colors	Allows you to specify a color for each different appointment Category.
Daily view start hour	Allows you to specify the default starting hour for the daily view.
Show start times only...	Instructs the program to leave off appointment ending times in the monthly view.
Show month in each day...	Instructs the program to include the name of the month in each day of the monthly view.
Use backcolor for monthly ...	Instructs the program to use a gray backcolor for each day's label in the monthly view.
Impose Calendar Filter ...	Causes the Tasks list that appears on the Calendar screen to be filtered using the Filter setting at the top of the Calendar screen (this option does not affect the task filtering setting on the Tasks screen).
Always start with todays ...	Instructs the program to revert to today's date each time it is opened rather than to remember the last-selected date.

Show reminders for ... Instructs the program to display a [pop-up reminder](#) whenever an appointment or appointment alarm time comes due.

Beep when appointments ... Instructs the program to "beep" when appointments.

Three different selections are also available in the lower right corner of the **Daily** and **Weekly** views on the **Calendar** screen as follows:

Contact Info: Displays listing information for the contact who is linked to the currently selected appointment. If no appointment is selected or if there is no contact link for the selected appointment, this area will be blank (gray).

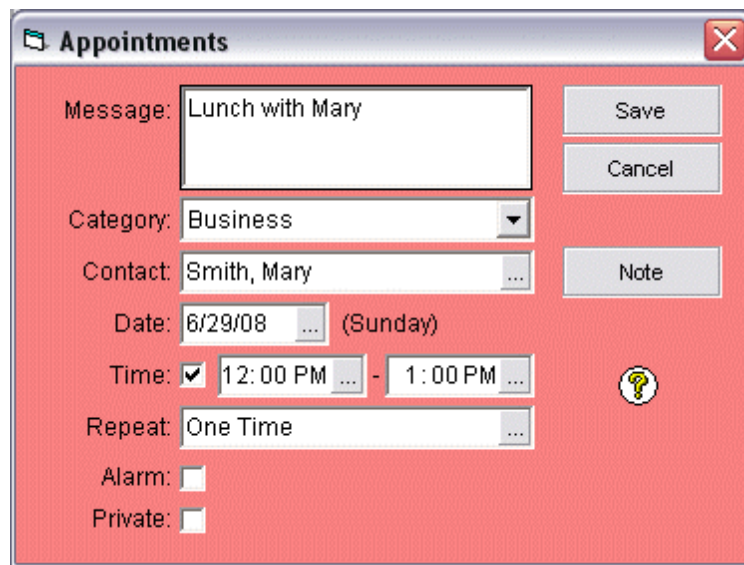
Appt. Note: Displays the **Note** associated with the currently selected appointment. If no appointment is selected or if the selected appointment does not have a **Note** entry, this area will be blank (gray).

Tasks: Displays a miniature version of the **Tasks** screen. If the **Option** is selected to "Impose Calendar filter on Tasks list" then this list will reflect the current setting in the **Calendar Filter** box. If not, it will reflect the current setting of the **Filter** box on the **Tasks** screen.

5.3.3 Creating an Appointment

Appointments can be created in any of the following ways.

1. By clicking on the **New** button in the **Daily** or **Weekly** views of the **Calendar**.
2. By right clicking anywhere on the calendar in the **Daily**, **Weekly** or **Monthly** views.
3. By clicking on the **New** button in the **Notes** view of the **Contacts** screen.
4. By clicking on one of the hour time boxes in the **Daily** view of the **Calendar**.
5. By assigning a **Schedule** of appointments to a contact, using the **Schedule** box on the **Contacts** screen.
6. By entering a **Birthday** for one of your contacts on the **Edit Contacts** screen.

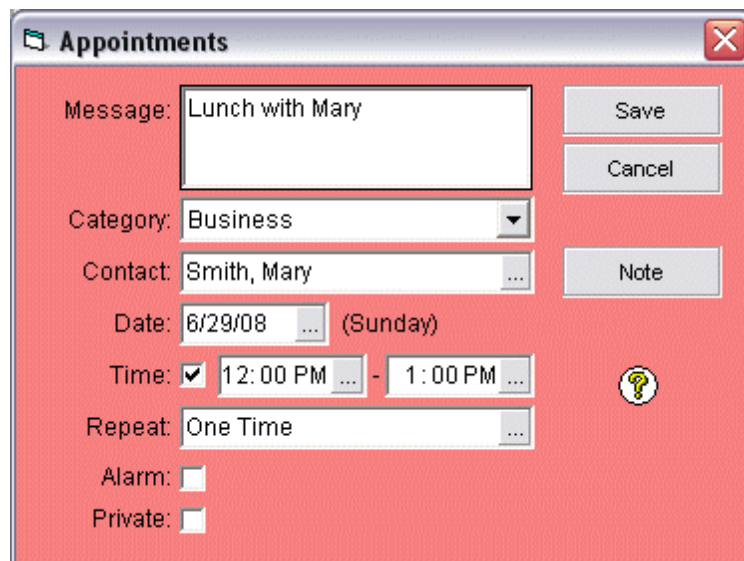
The screenshot shows a dialog box titled "Appointments" with a red background and a close button (X) in the top right corner. The dialog contains several input fields and buttons. On the left, there are labels for "Message:", "Category:", "Contact:", "Date:", "Time:", "Repeat:", "Alarm:", and "Private:". The corresponding values are: "Lunch with Mary" in the Message field, "Business" in the Category dropdown, "Smith, Mary" in the Contact field, "6/29/08" in the Date field with "(Sunday)" next to it, "12:00 PM" to "1:00 PM" in the Time field with a checked checkbox, "One Time" in the Repeat dropdown, and unchecked checkboxes for Alarm and Private. On the right side, there are three buttons: "Save", "Cancel", and "Note". A small yellow question mark icon is located below the "Note" button.

Creating an appointment using any of the first three methods displays the [Appointments](#) window allowing you to specify additional information regarding the appointment.

5.3.4 Editing an Appointment

Appointments can be edited in any of the following ways.

1. By double clicking directly on the appointment in the **Daily**, **Weekly** or **Monthly** view of the **Calendar** screen.
2. By selecting the appointment in the **Daily** or **Weekly** view and then clicking on the **Edit** button.
3. By right clicking on the appointment in the **Daily**, **Weekly** or **Monthly** view and then selecting **Edit**.
4. By using the **Edit** button in the **Notes** view of the **Edit Contacts** screen.

This is an identical screenshot of the "Appointments" dialog box as shown above. It features a red background, a close button (X) in the top right, and input fields for Message, Category, Contact, Date, Time, Repeat, Alarm, and Private. The values are: "Lunch with Mary", "Business", "Smith, Mary", "6/29/08 (Sunday)", "12:00 PM - 1:00 PM" (checked), "One Time", and unchecked checkboxes for Alarm and Private. Buttons for "Save", "Cancel", and "Note" are on the right, along with a yellow question mark icon.

(Appointments are also automatically updated whenever you change a contact's **Schedule** assignment or **Birthday** entry and then click on **Save** in the **Edit Contacts** screen)

Editing an appointment displays the **Appointments** window, allowing you to specify the following information.

Message	The message you want displayed when the appointment comes due and in printed reports.
Category	The category you would like to associate this appointment with for filtering purposes.
Contact	The contact, if any, that the appointment is linked to.
Date	The date of the appointment.
Time	The beginning and end time of the appointment (if un-checked, the appointment will be show as an appointment for that day but will not have a specified time).
Repeat	The type of appointment being created (please see below).
Alarm	Determines whether and when an alarm will be displayed <i>prior to</i> the actual appointment time.
Private	This field has no impact within the program but allows you to mark an appointment as Private for use with Palm-Compatible handheld organizers.

Clicking on the ellipsis (...) next to the **Repeat** box in the **Appointments** window displays the **Repeat Appointment Settings** window, allowing you to specify the type of repeat appointment and the frequency with which it should be repeated. Selecting **Monthly** in the **Repeat Appointment Settings** window allows you to additionally specify whether the appointment should repeat based on the actual date of the original appointment or based on the day of the week. Specifying that the appointment should repeat on a given day allows you to set up appointments that occur on a given day in a given week of each month (e.g. the third Thursday of each month). The day and week will be determined by the day and week of the date entered in the **Appointments** window.

5.3.5 Deleting an Appointment

Appointments can be deleted in any of the following ways.

1. By selecting the appointment in the **Daily** or **Weekly** view and then clicking on **Delete**.
2. By right clicking on the appointment in the **Daily**, **Weekly** or **Monthly** view and then selecting **Delete**.
3. By clicking on the **Delete** button in the **Notes** view of the **Contacts** screen.
4. By editing or deleting a **Loanout** transaction and follow-up date.
5. By changing an appointment schedule assignment using the **Schedule** box on the **Contacts** screen.
6. By changing a contact's **Birthday** using the **Birthday** box on the **Edit Contacts** screen.

If the appointment is set to repeat, you will be prompted to specify whether you would like to delete all of the appointment's occurrences or just the current one. Choosing to delete just the current occurrence leaves all other occurrences unchanged.

You can also delete blocks of appointments using the [Delete Calendar](#) option on the **File** menu. This feature allows you to delete all appointments set to occur before a specified date.

5.3.6 Filtering Appointments

The **Calendar** screen allows you to divide your appointments into categories you define using the **Tasks / Calendar** option on the **Categories** menu. Specifying different **Category** settings for your appointments allows you to view them by **Category** using the **Filter** selection box on the **Calendar** screen. Simply select the **Category(ies)** you would like to view and the display will be automatically updated.

The **Calendar** also allows you to view appointments based on whether or not they are set to occur at a specific time. This allows you to view and print calendars for birthdays and other "un-timed" events separately from calendars containing your actual day-to-day activities.

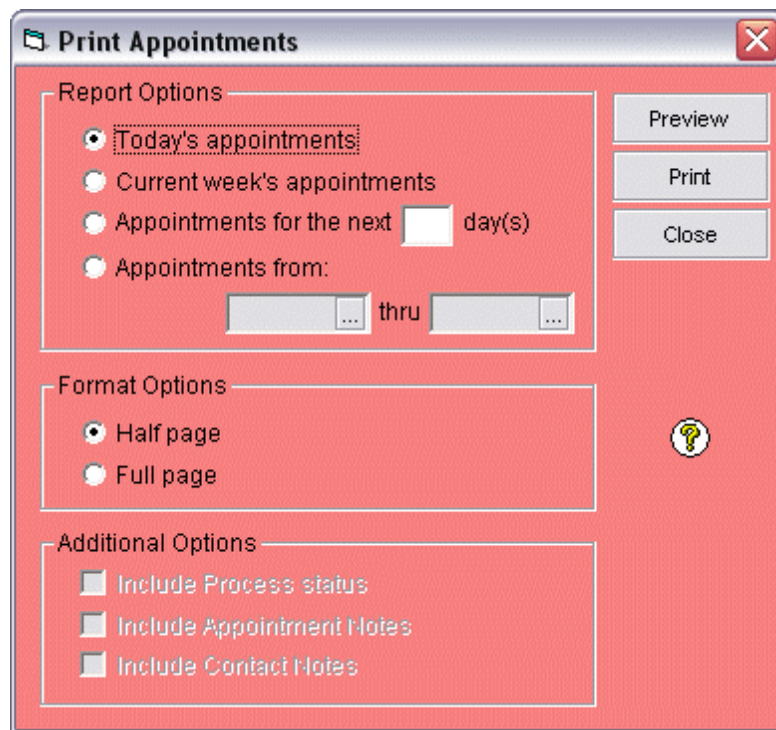
To view all of your appointments according to the options you have selected using the **Options** button click on **Select All** in the filtering window, then click on **OK**.

5.3.7 Printing Appointments

All three views in the **Calendar** have **Preview** and **Print** buttons located in the upper left and upper right hand corners of their calendar displays. These buttons always preview or print the day, week or month that is currently displayed. The **Print** button in the lower right hand corner of the **Daily** and **Weekly** calendar views, displays the **Print Appointments** window, allowing you to print a list of past, present or future appointments in half or full-page format.

To print your appointments for a given day or range of days, either click the **Print** button in the upper right hand corner of the **Calendar** screen or do the following:

1. Click on the **Print** button in the lower right hand corner of the **Daily** or **Weekly** calendar view to display the **Print Appointments** window.



2. Select one of the options in the **Report Options** section of the window as follows: The **Today's appointments** option always prints today's appointments, no matter what day or week is currently displayed. The "Current week's appointments" always prints appointments for the week that includes today's date, no matter what day or week is currently displayed. The "Appointments for the next xx day(s)" option always begins with today's appointments, no matter what day or week is currently displayed. The "Appointments from" option allows you to print appointments for any specified past, present or future time period.
3. Select either the **Half-page** or **Full-page** format.
4. For the **Full-page** format only, select any desired options from the **Additional Options** section of the window. These options allow you to customize your appointment printout to meet your needs by including: a list of the **Process** steps a linked contact has completed, any **Notes** that you have entered with your appointments, or any **Notes** that you have entered for a linked contact.

5.3.8 Printing a Monthly Calendar

The **Monthly** view in the **Calendar** screen allows you to **Preview** or **Print** a monthly calendar covering whatever days are currently displayed on the screen. The **Preview** and **Print** buttons are located respectively in the upper left and upper right hand corners of the **Monthly** view in the **Calendar** screen.

The **View Options** window (**Options** button on the **Calendar** screen) has an option allowing you to choose to "Show start times only in Monthly view", thus saving space and allowing more of the appointment message to be shown on the screen and in the printed monthly calendar.

5.3.9 Linking Appointments to a Contact

Appointments can be either stand-alone or they can be linked to one of your contacts. Linking appointments that are associated with one of your contacts offers several benefits.

1. Contact information is automatically displayed in the **Contact Info** window of the **Daily** or **Weekly** view whenever that appointment is selected.
2. Contact information is automatically included when you print an appointment summary.
3. The next scheduled appointment for each contact automatically appears in the **Notes** view of the **Edit Contacts** screen anytime that contact is selected. (Appointments created from the **Edit Contacts** screen are automatically linked to the correct contact.)

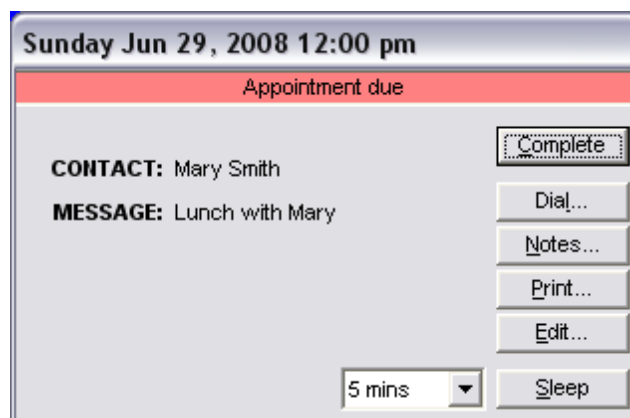
To link an existing appointment to one of your contacts simply edit the appointment and select the correct contact's name in the **Contact** box of the **Appointments** window.

A complete list of all of a person's activities, including appointments, can be viewed by selecting that person on the **Edit Contacts** screen and then clicking on the "binoculars" icon next to the **Schedule / Start Date** box also on the **Edit Contacts** screen.

5.3.10 Pop-Up Reminder

The program will automatically pop up an appointment reminder window anytime an appointment or an appointment alarm time comes due, if you have selected that option using the **Options** button on the **Calendar** screen. Appointment status is checked once every minute. A maximum of ten appointment reminders can be visible on the screen at one time. If the number of due appointments is greater than ten, the program will wait to display later appointments until earlier reminders are dismissed by clicking on the **Complete** button.

Reminders that are displayed before the actual appointment time in response to an alarm that's been set will have a yellow bar across the top with a caption that indicates the time that remains before the appointment becomes due. Reminders that are displayed at or after the actual appointment time will have a red bar across the top with a caption indicating that the appointment is now due.



The appointment reminder window offers the following options.

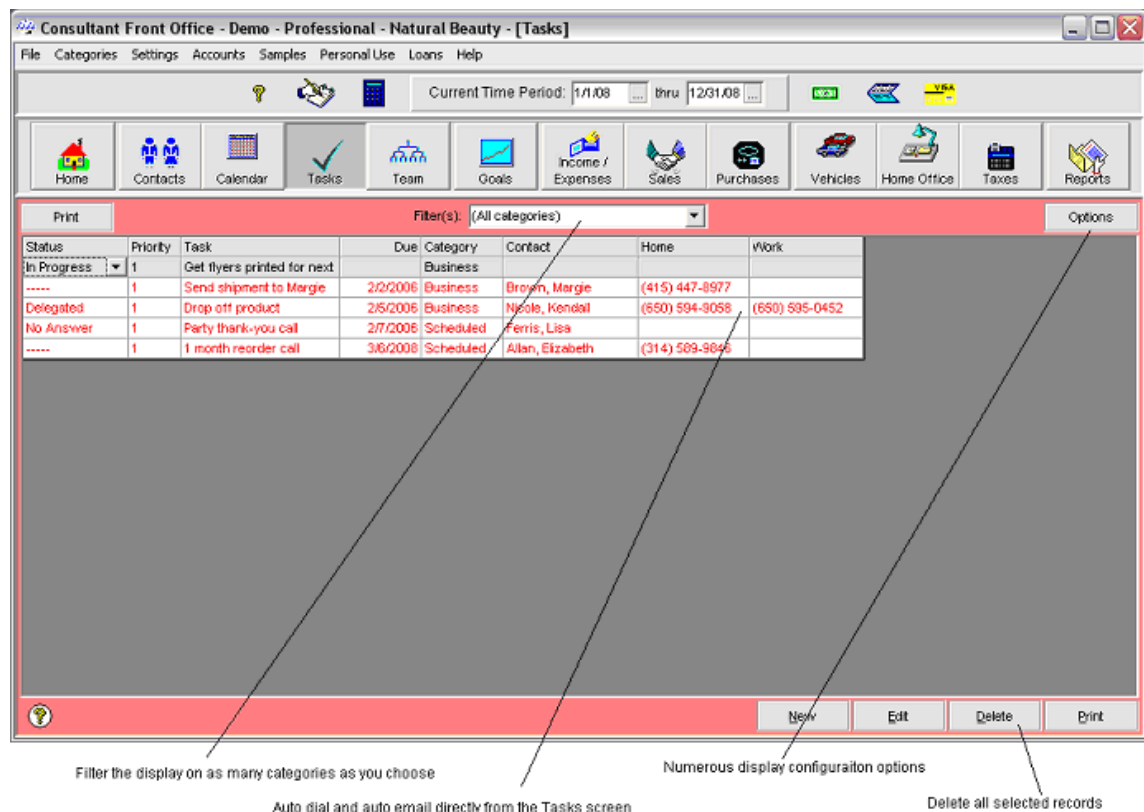
Complete	Permanently dismisses the alarm or appointment reminder. Clicking Complete for an appointment <i>alarm</i> that appears before the actual appointment time, will not prevent a reminder from being shown when the actual appointment time arrives.
Dial	Displays the Auto Dial window containing all of the linked contact's phone numbers.
Notes	Displays Contact Notes for the person associated with this appointment for reference or for editing.
Print	Prints the appointment information.
Edit	Opens the Appointments window allowing you to edit the appointment.
Sleep	Temporarily hides the appointment reminder for the specified length of time.

Checking the **Alarm** checkbox when creating or editing an appointment, will cause an appointment reminder to pop up first at the selected alarm time and then again at the actual appointment time. Clicking on **Complete** when the "alarm-time" reminder pops up will permanently dismiss the alarm reminder, but will not prevent the actual appointment reminder from being displayed *unless the actual appointment time has already passed when the alarm reminder is dismissed*.

5.4 Tasks

5.4.1 Overview

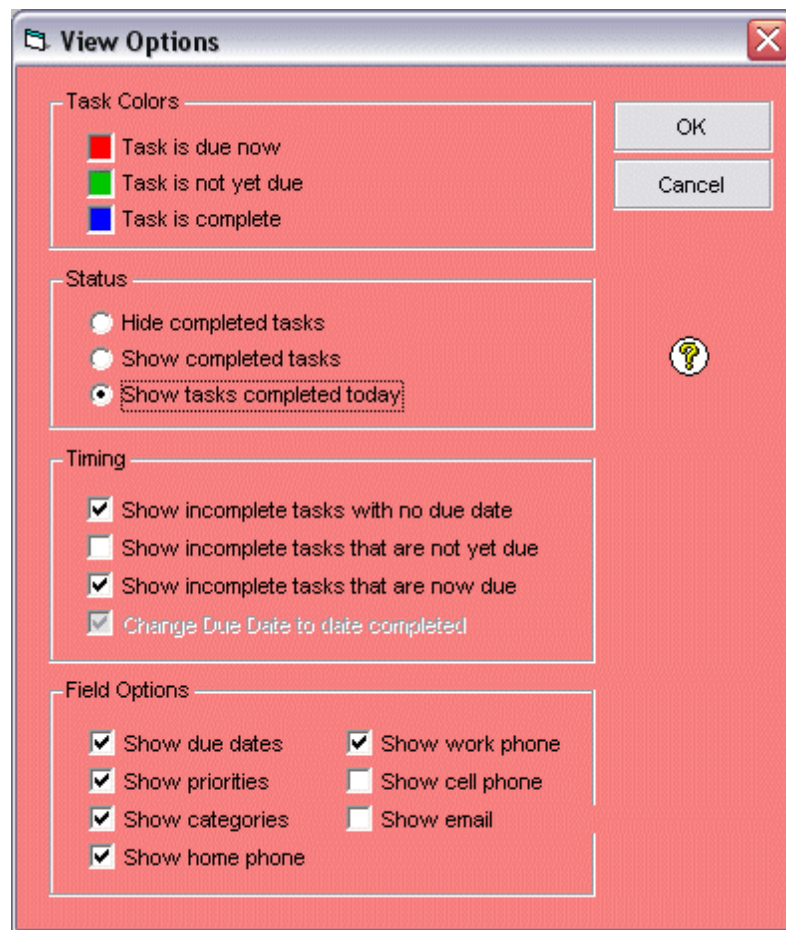
The **Tasks List** section of the program is used to set, edit, view and print tasks you need to complete. Tasks can be stand-alone or they can be linked to one of your contact listings. Linking a task to one of your contacts allows you to print phone numbers and **Notes** for that contact when you print a list of your tasks.



The tasks displayed on the **Tasks List** screen are controlled by the selection in the **Filter** box at the top of the **Tasks List** screen. The selection made in the **Filter** box specifies whether all of your tasks are displayed or only tasks with a specific **Category** setting. *If you are unable to find a task you've entered, try setting the **Filter** box to "(All Categories)" to ensure the task is not being filtered based on its **Category** setting.*

5.4.2 View Options

Clicking on the **Options** button in the **Tasks List** screen displays the **View Options** window allowing you to select from the following display options.



Hide completed tasks	Instructs the program to exclude tasks that have been marked Complete .
Show completed tasks	Instructs the program to include tasks that have been marked Complete .
Show tasks completed today	Instructs the program to hide tasks that have been marked Complete unless they were completed today.
Show incomplete tasks ... no due date	Instructs the program to include incomplete tasks that have no set Due Date .
Show incomplete tasks ... not yet due	Instructs the program to include incomplete tasks with a Due Date that's later than today.
Show incomplete tasks ... now due	Instructs the program to include incomplete tasks that with a Due Date that's on or before today.
Change due date to date...	Instructs the program to overwrite the Date Due field with the date that a task is marked as Complete .

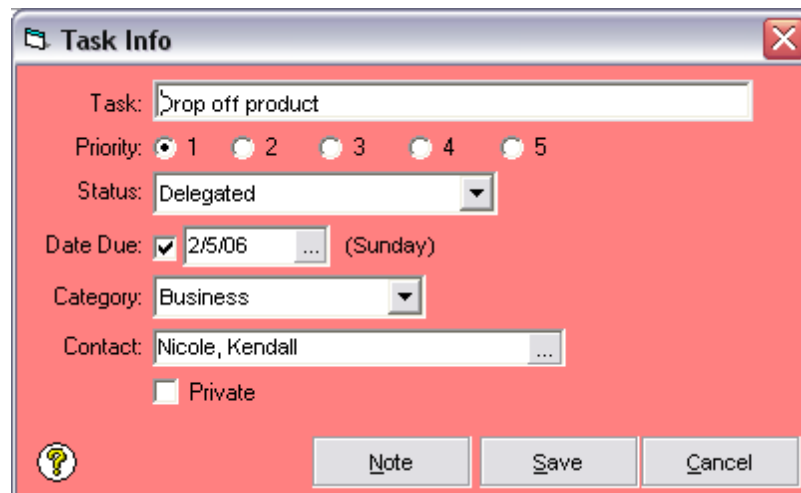
Show due dates	Instructs the program to include the Date Due field.
Show priorities	Instructs the program to include the Priorities field.
Show categories	Instructs the program to include the Categories field.
Show home phone	Instructs the program to include the home phone number field.
Show work phone	Instructs the program to include the work phone field.
Show cell phone	Instructs the program to include the cell phone field.
Show email	Instructs the program to include the email address field.

You can sort the tasks shown in the **Tasks List** screen display by simply clicking on any of the column headings. Clicking on the same column more than once toggles the sort between ascending and descending order.

5.4.3 Creating a Task

Tasks can be created in one of three ways.

1. By clicking on the **New** button in the **Tasks List** screen.
2. By right clicking on the task display portion of the **Tasks List** screen and then selecting **New**.
3. By using the **New** button in the **Notes** view of the **Edit Contacts** screen.

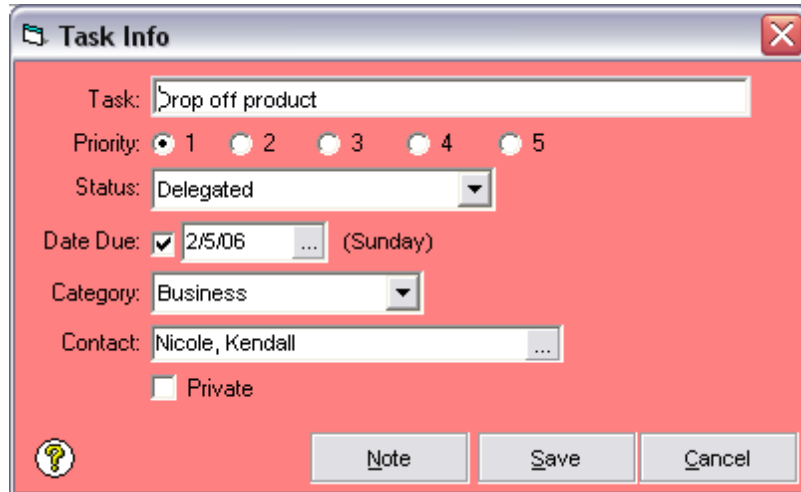


All of these methods display the [Task Info](#) window allowing you to enter the information associated with the new task.

5.4.4 Editing a Task

Tasks can be edited in one of three ways.

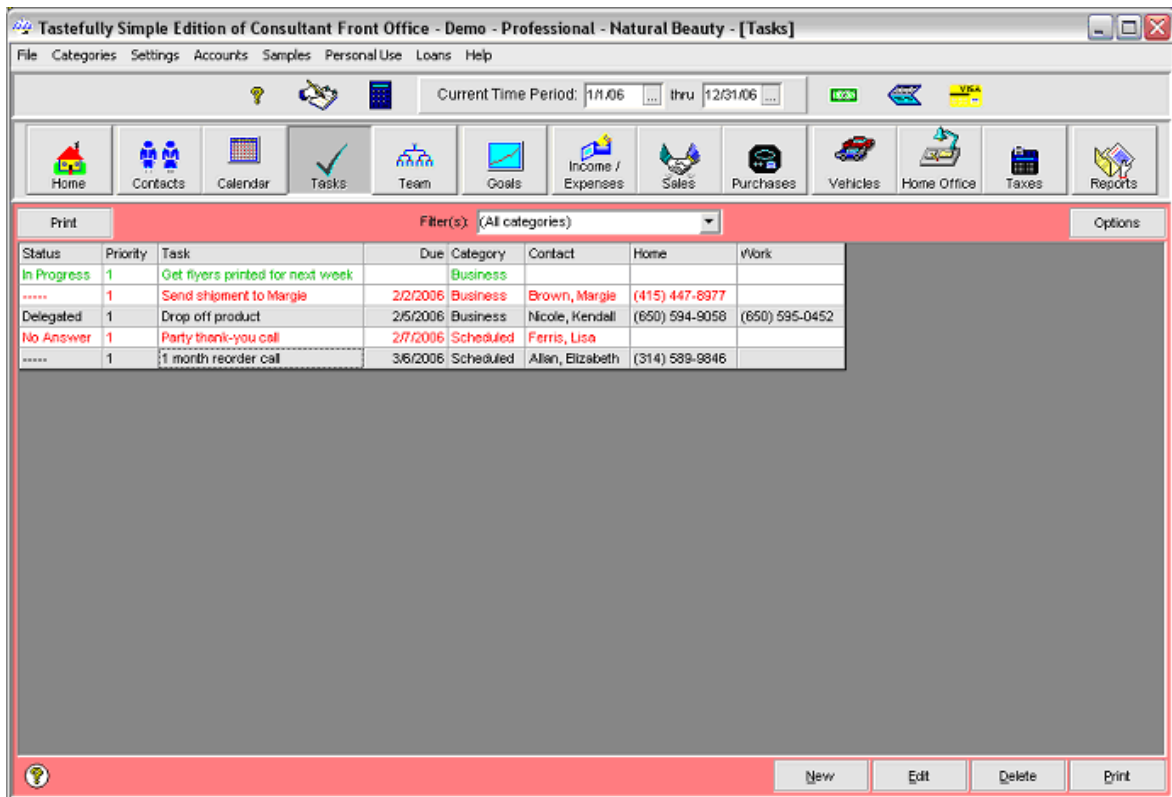
1. By selecting the task in the **Daily** view and then clicking on **Edit**.
2. By right clicking directly on the task and then selecting **Edit**.
3. By using the **Edit** button in the **Notes** view of the **Edit Contacts** screen.

The image shows a 'Task Info' dialog box with a red background and a grey border. It contains several fields: 'Task' with the text 'Drop off product', 'Priority' with radio buttons for 1 through 5 (1 is selected), 'Status' with a dropdown menu showing 'Delegated', 'Date Due' with a checked checkbox, a date field '2/5/06', and '(Sunday)', 'Category' with a dropdown menu showing 'Business', 'Contact' with a text field 'Nicole, Kendall' and an ellipsis button, and a 'Private' checkbox which is unchecked. At the bottom, there is a help icon (question mark in a circle) and three buttons: 'Note', 'Save', and 'Cancel'.

Editing a task displays the **Task Info** window, allowing you to specify the following information.

Task	A description of the task to be completed.
Priority	The importance of the task (1=high, 5=low).
Status	The current status of this task
Date Due	The date the task must be completed by (if any).
Category	The category that best describes the task.
Contact	The contact with which this task is linked (if any).
Private	Allows you to hide tasks when syncing with a Palm-compatible organizer.

5.4.5 Deleting a Task



Tasks can be deleted in one of three ways.

1. By selecting the task and then clicking on **Delete**.
2. By right clicking directly on the tasks and then selecting **Delete**.
3. By using the **Delete** button in the **Notes** view of the **Contacts** screen.
4. By right clicking in an **Activities** window and then left clicking on **Delete**.

5.4.6 Filtering and Sorting Tasks

The **Tasks List** screen allows you to divide your tasks into categories you define using the **Tasks / Calendar** option on the **Categories** menu. Specifying different **Category** settings for your tasks allows you to view them by **Category** using the **Filter** selection box on the **Tasks List** screen. Simply select the **Category(ies)** you would like to view and the display will be automatically updated. To view all of your tasks according to the options you have selected using the [Options](#) button click on **Select All** in the filtering window, then click on **OK**.

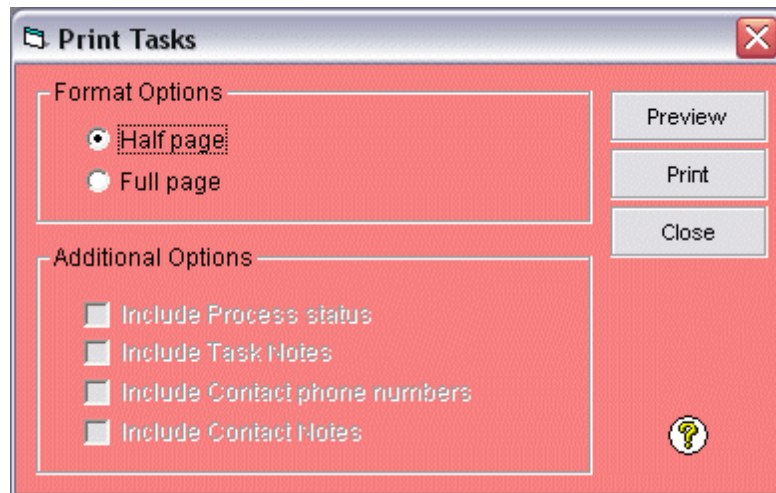
You can also sort your task display by simply clicking on any of the column headings. Clicking more than once toggles the sort between ascending and descending order.

5.4.7 Printing a Task

The **Print** button in the lower right hand corner of the **Tasks List** screen displays the **Print Tasks List** window, allowing you to print the list of tasks currently displayed in the **Tasks List** screen.

To print a list of your tasks do the following:

1. Use the **Filter** selection box along with the view **Options** button to display your tasks the way you would like them printed. To sort the Tasks List display, just click on any of the column headings. (Note: all columns are automatically included in the printout even if you have elected not to have one or more of them displayed in the **Tasks List** screen).
2. Click on the **Print** button from the **Tasks List** screen to display the **Print Tasks List** window.



3. Select either the **Half-page** or **Full-page** format.
4. For the **Full-page** format only, select any desired options from the **Additional Options** section of the window. These options allow you to customize your appointment printout to meet your needs by including:
 5. A list of the **Process** steps a linked contact has completed
 6. Any **Notes** that you have entered with your appointments
 7. All of the phone numbers or **Notes** that you have entered for a linked contact.

5.4.8 Linking Tasks to a Contact

Tasks can either be stand-alone (e.g. Make copies) or they can be linked to one of your contact listings. Linking tasks are associated with a contact offers several benefits.

1. Contact information is automatically included when you print a task summary.
2. The next incomplete task for each contact automatically appears in the **Notes** view of the **Edit Contacts** screen anytime that listing is selected.
3. All of the incomplete tasks for each contact automatically appear in the **Activities** window that can be accessed via the "binoculars" icon on the **Edit Contacts** screen.

To link an existing task to one of your contact listings simply right click on the task in the **Tasks List** screen, then click on **Edit** to display the **Task Info** window. Locate the box labeled **Contact**, then either click into the box and begin typing the contact's last name or simply click on the button on the right side of the box and select the name from the **Contacts** selection window. New appointment links are created in a similar manner. Contact links can be removed by clicking on the button and then click on the **Remove Link** button in the **Contacts** selection window.

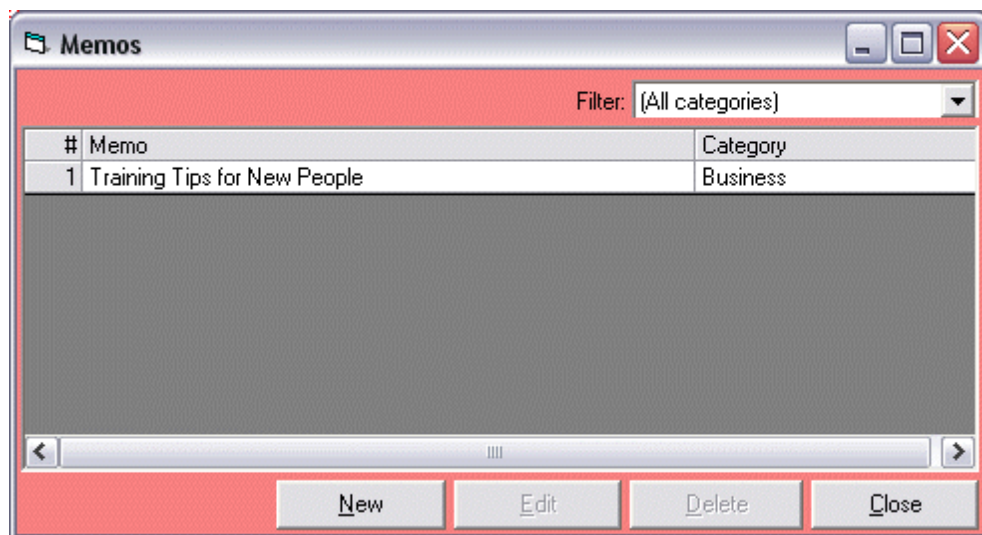
A complete list of all of a person's activities, including tasks, can be viewed by selecting that person on the **Edit Contacts** screen and then clicking on the "binoculars" icon next to the **Schedule / Start**

Date box also on the **Edit Contacts** screen.

5.5 Memos

5.5.1 Overview

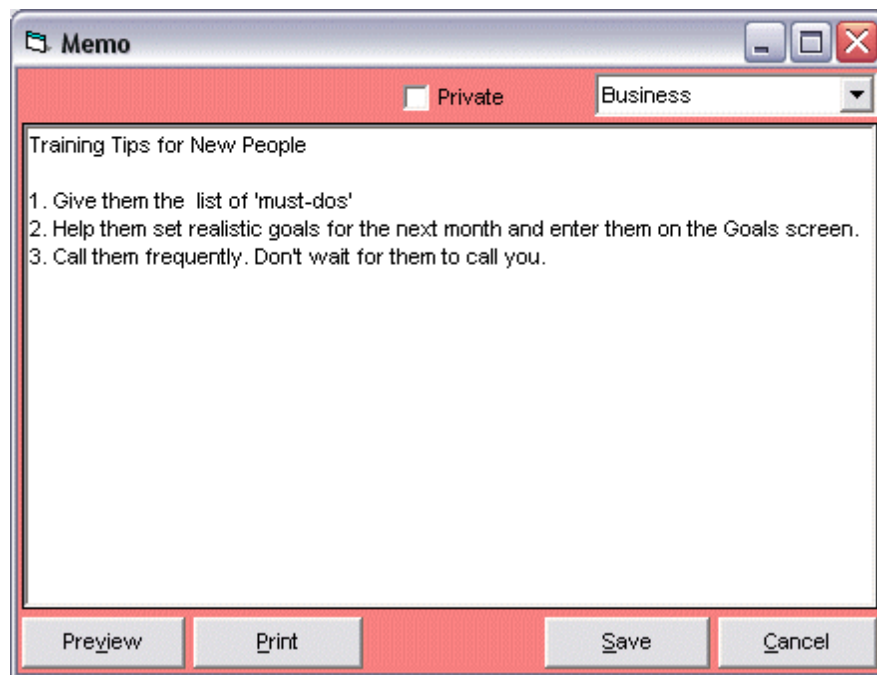
The **Memos** window is used for creating, editing and deleting memos. It is accessed by clicking on the note pad icon on the left side of the **Current Time Period** toolbar. The list of memos visible in this window can be filtered by making a selection in the **Filter** box. New memo categories can be added to the **Filter** box using the **Memos** option on the **Categories** menu. You may save as many memos as you like. Each memo can be up to 4000 characters in length.



5.5.2 Creating a Memo

To create a memo, you must first open the **Memos** window, which can be accessed by clicking on the notebook icon to the left of the **Current Time Period** toolbar (near the top of the main program window). Memos can then be created in one of two ways.

1. By clicking on the **New** button in the **Memos** window.
2. By right clicking on the memo display table in the **Memos** window and then selecting **New**.

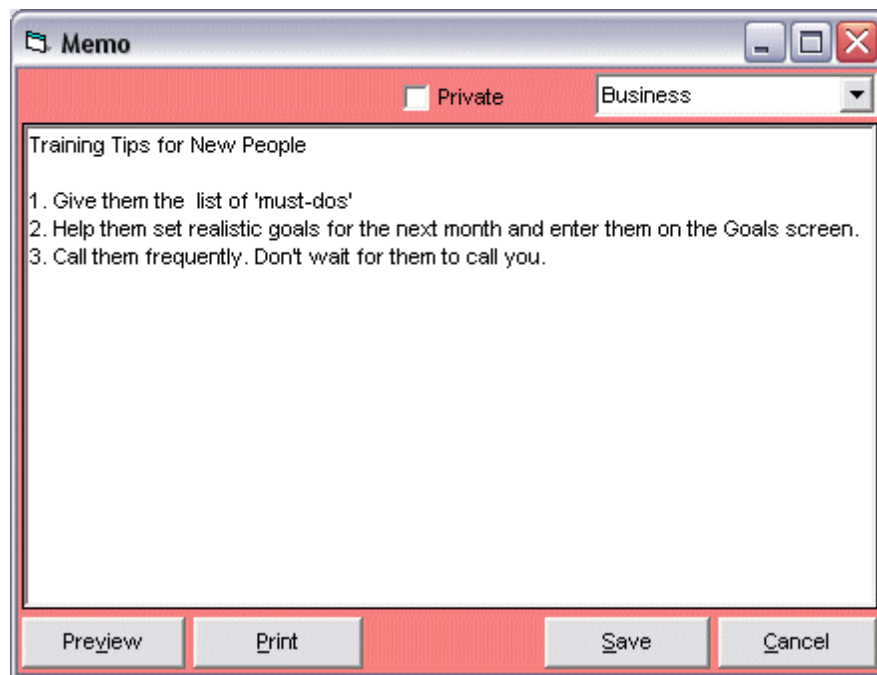


Both of these methods display the **Memo** window allowing you to enter the memo text and select a memo category for filtering purposes.

5.5.3 Editing a Memo

Memos can be edited in the following ways.

1. By selecting a memo from the list in the **Memos** window and then clicking on **Edit**.
2. By right clicking directly on a memo from the list in the **Memos** window and then selecting **Edit**.
3. By double clicking directly on a memo from the list in the **Memos** window.



All of these methods display the **Memo** window, allowing you to modify the selected memo. The **Private** box in the **Memo** window allows you to hide memos when interfacing with a Palm-compatible handheld organizer.

5.5.4 Deleting a Memo

Memos can be deleted in the following ways.

1. By selecting the memo from the list in the **Memos** window and then clicking on **Delete**.
2. By right clicking directly on the memo and then selecting **Delete**.
3. By deleting the memo from the **Notes** tab on the **Contacts** screen.
4. By right clicking and deleting the memo via the **Activities** window on the **Contacts** screen (click on the "binoculars" icon).

5.5.5 Filtering Memos

The **Memos** window allows you to divide your memos into categories you define using the **Memo** option on the **Categories** menu. Specifying different **Category** settings for your memos allows you to view them by **Category** using the **Filter** selection box in the **Memos** window. Simply select the **Category** you would like to view and the display will be automatically updated. To view all of your memos select **All categories** (the topmost **Filter** setting).

5.5.6 Printing a Memo

Memos can be previewed or printed by selecting the memo for editing and then clicking on the **Preview** or **Print** button in the **Memo** window.

5.6 Team

5.6.1 Overview

The **Team** screen is used for viewing your downline organization. This allows you to quickly visualize how your organization is laid out and to identify legs and sub-legs that need strengthening. Individual members can be quickly located using the Explorer-type hierarchy on the left or by selecting their name from the alphabetical listing in the lower right-hand corner of the **Team** screen.

Filter and viewing **Options** can be set directly in the **Team** screen, allowing you to differentiate and visually distinguish segments of your downline. These features make it easy to visualize where your leaders are and to identify members by title, renewal date or activity level.

Team members are entered into the program using the **Contacts** screen.

5.6.2 Views

The **Team** screen offers three views.

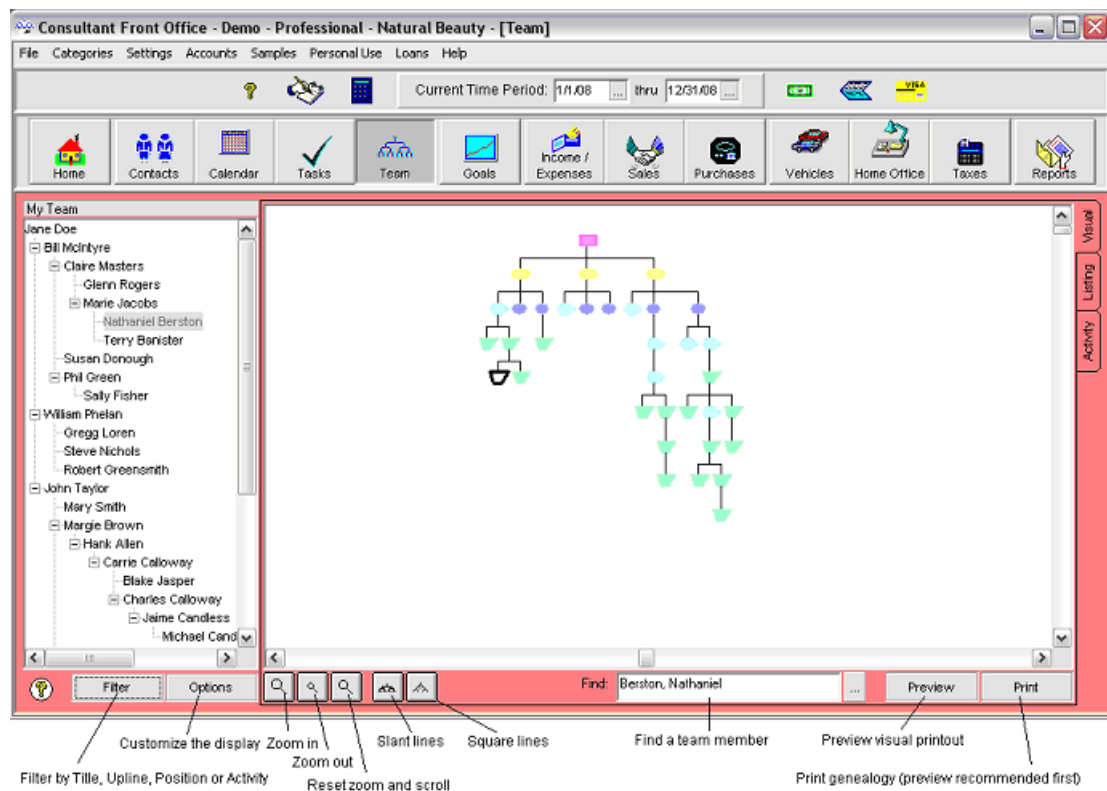
Visual: Shows a hierarchical display of your entire team with **Filter** and **Options** settings to help you better understand your organization's strengths and weaknesses.

Listing : Allows you to quickly access contact information for any of your team members.

Activity: Allows you to track up to twelve user-definable numeric fields for each of your team members.

All three views share an Explorer-type navigational window located at the left side of the **Team** screen.

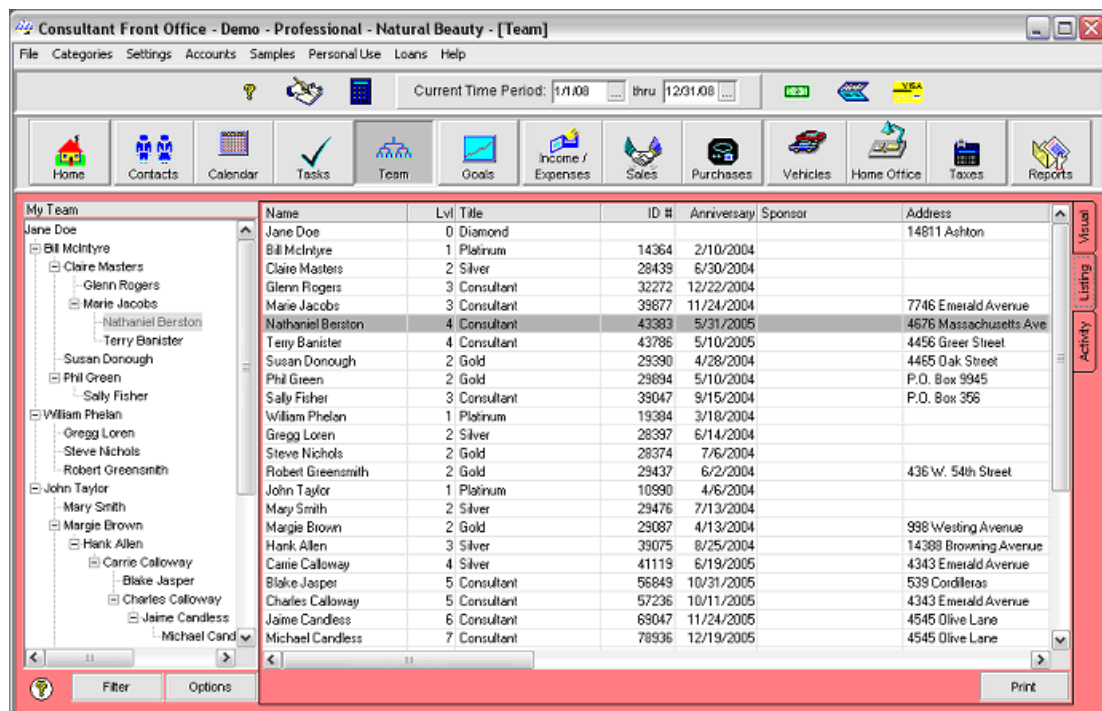
 Visual View



In the **Visual** view, members of your team are displayed in a bubble-diagram with the currently selected member shown in bold. Use the magnifying-glass buttons to change the display's magnification or to reset it to its default position and magnification. Holding the **CTRL** key down while clicking either of the zoom buttons allows you to change the zoom setting more quickly. The rightmost magnifying-glass button sets the magnification back to its default value and re-centers the display around the topmost node.

To view off-screen portions of your team use the horizontal and vertical scrollbars. Scrolling can also be accomplished by dragging the diagram using your mouse. To do this, left click directly on the diagram, then move your mouse while continuing to hold the mouse button down. Double clicking on any team member in the **Visual** view automatically opens the **Contacts** screen and selects that member's record. If that member's record does not get selected, check to make sure that the member's name has not been temporarily filtered out using the **Filter** function on the **Contacts** screen. **Team** member information can be displayed for whichever member the mouse is currently over, by right clicking anywhere in the **Visual** view and left clicking on **Show Popup**. To have each node numbered with reference to the Explorer-type treeview on the left, right click in the **Visual** view and then left click on **Use Numbers**.

Listing View



In the **Listing** view, contact information for the members of your team is displayed in a table with the currently selected member highlighted in blue. Members who are hidden from view in the Explorer hierarchy are also hidden from view in the **Listing** view grid. To display hidden members click on the plus sign next to their upline in the Explorer hierarchy or just double click on their upline's name. Double clicking on any portion of a member's contact information in the table portion of the **Listing** view automatically opens the **Contacts** screen and selects that member's record. If that member's record does not get selected, check to make sure that the member's name has not been temporarily filtered out using the **Filter** function on the **Contacts** screen.

Activity View

Name	ID #	Lvl	Team	Title	Anniv	Oct	Nov	Dec	Pers. Total	Leg Total
Jane Doe		0	34	Diamond		400.00	400.00	800.00	7,600.00	132,450.00
Bill McIntyre	14364	1	8	Platinum	2/10/04	0.00	0.00	400.00	6,400.00	41,325.00
Claire Masters	28439	2	4	Silver	6/30/04	800.00	500.00	900.00	5,200.00	19,950.00
Glenn Rogers	32272	3	0	Consultant	12/22/04	500.00	200.00	200.00	3,900.00	3,900.00
Marie Jacobs	39877	3	2	Consultant	11/24/04	400.00	500.00	500.00	4,400.00	10,850.00
Nathaniel Berston	43383	4	0	Consultant	5/31/05	100.00	900.00	0.00	3,000.00	3,000.00
Terry Banister	43786	4	0	Consultant	5/10/05	150.00	0.00	300.00	3,450.00	3,450.00
Susan Donough	29390	2	0	Gold	4/28/04	750.00	750.00	750.00	5,250.00	5,250.00
Phil Green	29894	2	1	Gold	5/10/04	600.00	800.00	900.00	5,300.00	9,725.00
Sally Fisher	39047	3	0	Consultant	9/15/04	500.00	450.00	475.00	4,425.00	4,425.00
William Phelan	19384	1	3	Platinum	3/18/04	0.00	400.00	250.00	7,650.00	19,800.00
Gregg Loren	28397	2	0	Silver	6/14/04	300.00	200.00	700.00	4,200.00	4,200.00
Steve Nichols	28374	2	0	Gold	7/6/04	450.00	500.00	700.00	4,650.00	4,650.00
Robert Greensmith	29437	2	0	Gold	6/2/04	900.00	100.00	300.00	3,300.00	3,300.00
John Taylor	10890	1	20	Platinum	4/6/04	300.00	0.00	800.00	7,100.00	63,725.00
Mary Smith	29476	2	0	Silver	7/13/04	200.00	200.00	300.00	3,700.00	3,700.00
Margie Brown	29087	2	6	Gold	4/13/04	100.00	0.00	900.00	3,000.00	21,025.00
Hank Allen	39075	3	5	Silver	8/25/04	0.00	0.00	200.00	3,200.00	18,025.00
Carrie Calloway	41119	4	4	Silver	6/19/05	800.00	600.00	900.00	2,300.00	14,825.00
Blake Jasper	56849	5	0	Consultant	10/31/05	0.00	850.00	975.00	2,825.00	2,825.00
Charles Calloway	57236	5	2	Consultant	10/11/05	200.00	300.00	400.00	3,900.00	9,700.00
Jaime Candless	69047	6	1	Consultant	11/24/05	500.00	300.00	800.00	4,600.00	5,800.00
Michael Candless	78936	7	0	Consultant	12/19/05	500.00	400.00	300.00	1,200.00	1,200.00
Jamie Goldsmith	29047	2	11	Gold	5/1/04	800.00	700.00	700.00	2,200.00	31,900.00
Totals:						975.00	400.00	075.00	132,450.00	534,125.00

In the **Activity** view, volume or other numeric values associated with each of your team members is displayed under user-definable headings (right click to edit). Members who are hidden from view in the Explorer hierarchy are also hidden from view in the **Activity** view grid. To display hidden members, click on the plus sign next to their upline in the Explorer hierarchy or just double click on their upline's name. Numeric values can be entered in any of the five columns immediately to the right of the Name, ID and Level columns. Values entered in these columns are associated with the corresponding downline member and are automatically saved when you leave the **Team** screen.

5.6.3 Team Selecting

Members of your team can be selected in any of the **Team** views, using the Explorer-type display located on the left side of the **Team** screen. In the **Visual** view, team members can also be selected either by clicking directly on the visual image or using the alphabetically-sorted list available via the box located at the bottom of the **Visual** tab. Click on the button at the right hand side of the box to select a name from the list shown in the **Team** window. Names can also be selected by clicking directly into the box and typing the first few letters of the member's last name. The **Up** and **Down** arrow keys and the **PgUp** and **PgDn** keys on your keyboard can be used to scroll through the list of names.

5.6.4 Team Adding, Deleting and Editing

Team listings cannot be added, deleted or edited from the Team screen. All Team modifications are accomplished using the appropriate functions on the Contacts screen.

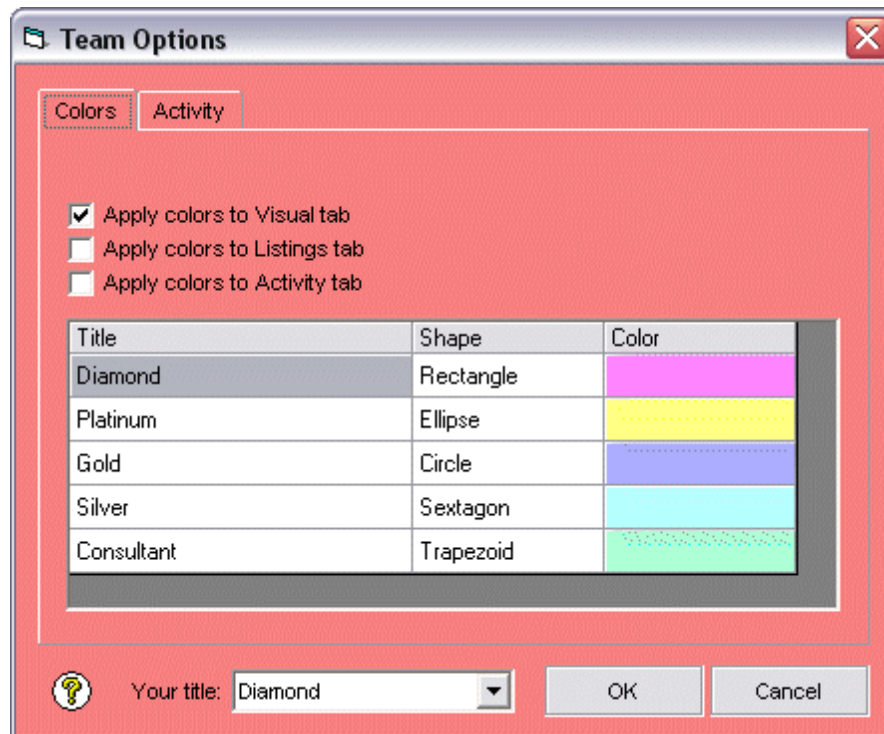
5.6.5 Team Filtering

The **Team Filter** window is available via the **Filter** button on the **Team** screen, via the **Team Filter** button in the **Filter Contacts** window and also when clicking on the **Team Hierarchy** reports option on the **Reports** screen. This window allows you to separate out certain members of your team based on their position and / or title in your organization. It contains four filtering criteria that can be used either individually or in combination with one another.

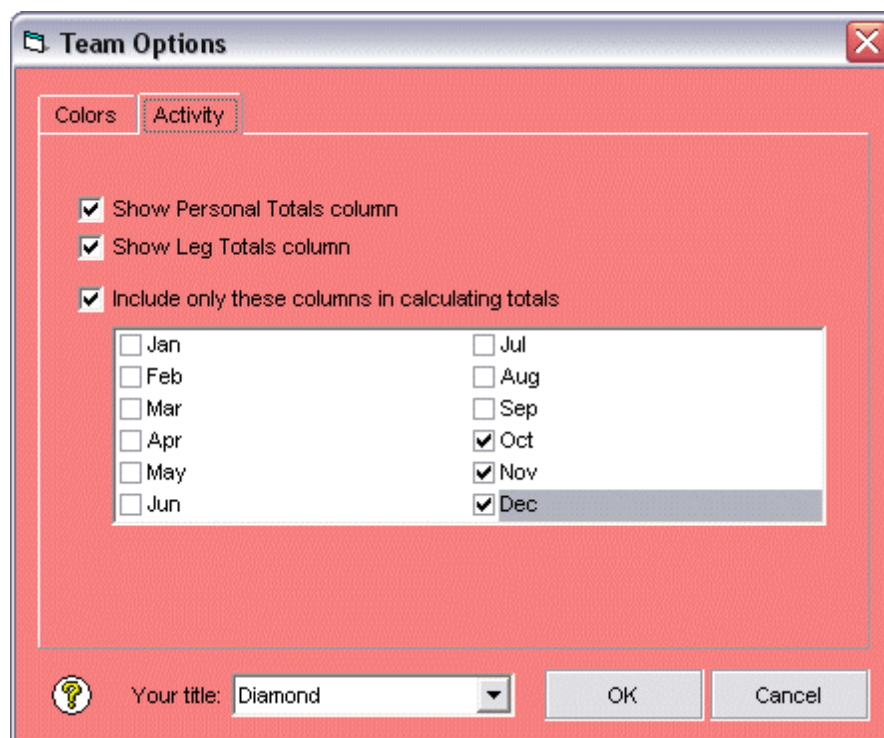
- **Leg Filter:** Checking the box that reads "Use Leg Filter" enables the **Upline** selection box and the **Level** entry boxes, allowing you to specify which leg you would like to filter on. The person whose name you select in the **Upline** box will be the topmost person in the selected leg. Your entries in the **Level** boxes will determine whether all or part of the selected individual's personal team is included in the filtered results.
- **Title Filter:** Checking the box that reads "Use Title Filter" enables the **Titles** selection box, allowing you to specify which titles you would like to filter on. Only members of your team whose **Title** (as selected on the **Contacts** screen) matches one of the selected titles, will be included in the filtered results.
- **Renewal Filter:** Checking the box that reads "Use Renewal Filter" enables the **Renewal Date Filter** entry boxes, allowing you to enter a date range to filter on. Only members of your team whose **Renewal** date (as entered on the **Contacts** screen) falls within the specified date range will be included in the filtered results.
- **Activity Filter:** Checking the box that reads "Use Activity Filter" enables the **Activity Filter** entry boxes, allowing you to enter a numeric range and select an activity field to filter on. Only members of your team whose entry in the selected field falls within the specified range will be included in

the filtered results. Note: activity values are entered on the **Activity** tab of the **Team** screen. They can also be imported if your company provides this information in the correct format.

5.6.6 Team Options



The **Team Options** window is available by clicking on the **Options** button on the **Team** screen. This window allows you to associate a different shape and color with each team **Title**.. **Team** members are then displayed using the shape and color associated with their current title as entered on the **Contacts** screen. Entries on the **Listings** tab and the **Activity** tab of the **Team** screen can also be colored according to **Title** if those options are selected.



The **Activity** tab in the **Team Options** window allows you to specify whether **Personal Total** and **Leg Total** columns should be displayed on the **Activity** tab of the **Team** screen. It also allows you to specify which activity columns should be included in calculating those totals. This allows you to view personal and leg totals based on a month, a quarter, a year, or any other number of months that you choose.

5.6.7 Team Printing

The **Visual** tab of the **Team** screen can be printed at any of the available levels of magnification. To preview or print your team "tree" click on the **Preview** button in the lower right corner of the **Visual** tab. This will open the **Print Preview** window. Previewing what will be printed first allows you to select individual pages to be printed if you choose.

The **Use Numbers** option on the right click menu of the **Visual** tab can be used to create a "key" to identify individual nodes after printing. This option allows you to print your team at a lower magnification, thereby reducing the overall size of the printout, while still being able to locate team members by name and number.

Part

VI

Financial Management

6 Financial Management

6.1 Overview

The program is designed to handle all of your business's financial management needs and to generate tax-ready reports for income and sales tax filing. The financial management section of the program consists of up to eight main screens as follows:

<u>Goals</u>	used to enter financial and recruiting goals and to track your progress against them (Professional Editions only)
<u>Income / Expenses</u>	used to enter non-product income and expenses
<u>Sales</u>	used to enter sales you make to your customers
<u>Purchases</u>	used to enter purchases you make from the company you sell products for
<u>Vehicles</u>	used to enter mileage and expenses involving business use of personal vehicles (Standard and Professional Editions only)
<u>Home Office</u>	used to enter expenses associated with a home office (Professional Editions only)
<u>Taxes</u>	used to help you prepare tax reports or request a free tax preparation quote. Also used to export your records to TurboTax [®] or TaxCut [®] (Professional Editions only)

There are also a number of menu items at the top of the main program window that are part of the financial management system, including:

Categories	used to edit Income and Expense categories and product and Event information
<u>Settings</u>	used to access some financial settings
Accounts	used to access your cash, checking and credit card account registers
<u>Personal Use</u>	used to track product taken for your personal use
<u>Samples</u>	used to track product taken as promotional samples
<u>Loans</u>	used to track products you loan or borrow (Std and Pro only)
<u>Trades</u>	used to track product trades (Std and Pro only)

Inventory

used to make occasional inventory adjustments (full-inventory edition only)

Detailed information on all of these functions can be found by locating the topic in the main Table of Contents.

6.2 Setup

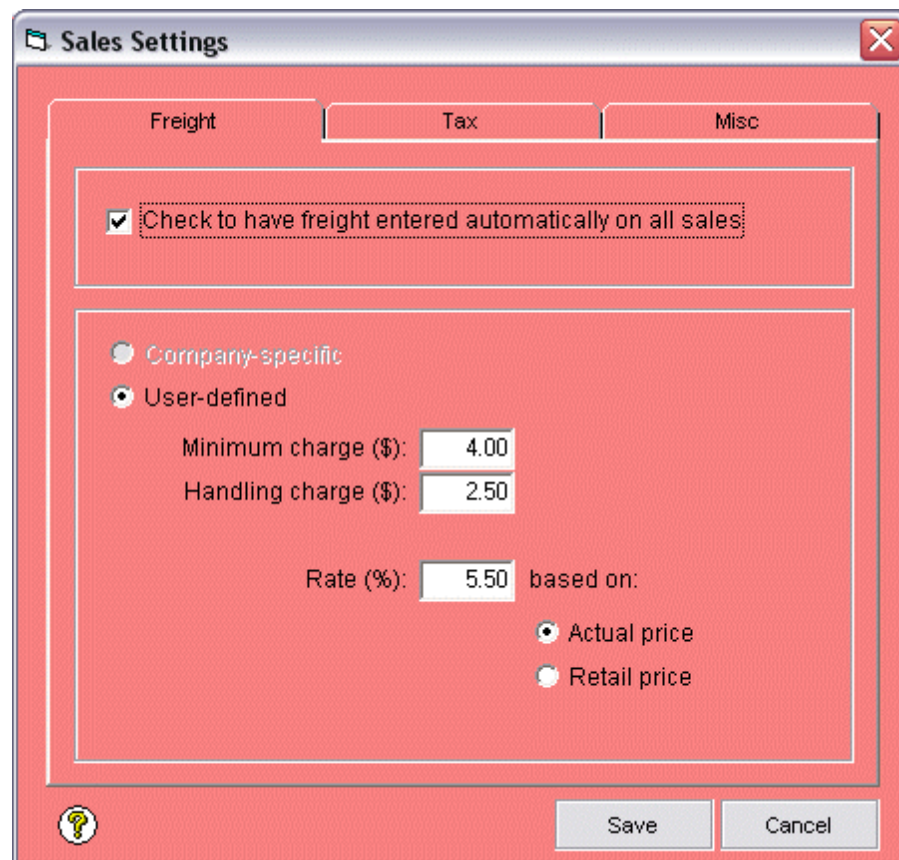
6.2.1 Setting Freight Rates

Purchases

There is typically no need to set freight rates in the program for product purchases. *The freight charge on product purchases should generally be copied directly from your company's invoice, making freight settings for purchases unnecessary.*

Sales

Freight rates for product sales are entered using the **Settings** buttons on the **Edit Sales** screen. This window can also be accessed via the **Setup Wizard** option on the **Help** menu and by clicking on the **Freight** label on the **Edit Sales** screen.



The image shows a screenshot of the "Sales Settings" dialog box. It has a title bar with a folder icon and a close button. Inside, there are three tabs: "Freight", "Tax", and "Misc". The "Freight" tab is selected. Within this tab, there is a checkbox labeled "Check to have freight entered automatically on all sales:" which is checked. Below this, there are two radio buttons: "Company-specific" (unselected) and "User-defined" (selected). Under "User-defined", there are three input fields: "Minimum charge (\$):" with the value "4.00", "Handling charge (\$):" with the value "2.50", and "Rate (%):" with the value "5.50". To the right of the "Rate (%)" field is the text "based on:". Below this text are two radio buttons: "Actual price" (selected) and "Retail price" (unselected). At the bottom left of the dialog is a help icon (a question mark in a circle). At the bottom right are two buttons: "Save" and "Cancel".

If you would like the program to calculate and enter freight for you on the **Sales** screen, check

the checkbox at the top of the **Sale Settings** window. In general, it is usually easier to *enter freight on product purchases manually*, while allowing the program to calculate and enter the freight for you on product sales.

Company-specific: In some custom editions of the program, the **Company-specific** freight calculation option will be enabled. Checking this box instructs the program to calculate freight charges using the method your company employs to determine freight charges. **Company-specific** freight calculations are handled automatically by the program, hence none of the **User-defined** settings will have any impact on freight calculations when this option is selected.

User-defined: When the **User-defined** freight calculation option is selected, the amount of freight automatically entered on product sales is calculated as follows. First, the program multiplies the freight rate, if any, times the total cost, price or weight of the product(s) being purchased or sold. Second, it compares this result with the minimum / fixed charge, selects whichever value is higher, and adds to it any handling charges. If you don't specify a minimum / fixed charge, the freight calculated will always be the freight rate times the total product cost, price or weight, plus handling. If you don't specify a freight rate, the freight calculated will always be the fixed / minimum charge plus handling.

6.2.2 Setting Tax Rates

Purchases

There is typically no need to set tax rates in the program for product purchases. *The tax charge (s) on product purchases should generally be copied directly from your company's invoice, making tax settings for purchases unnecessary (see Step 3 below).*

Sales

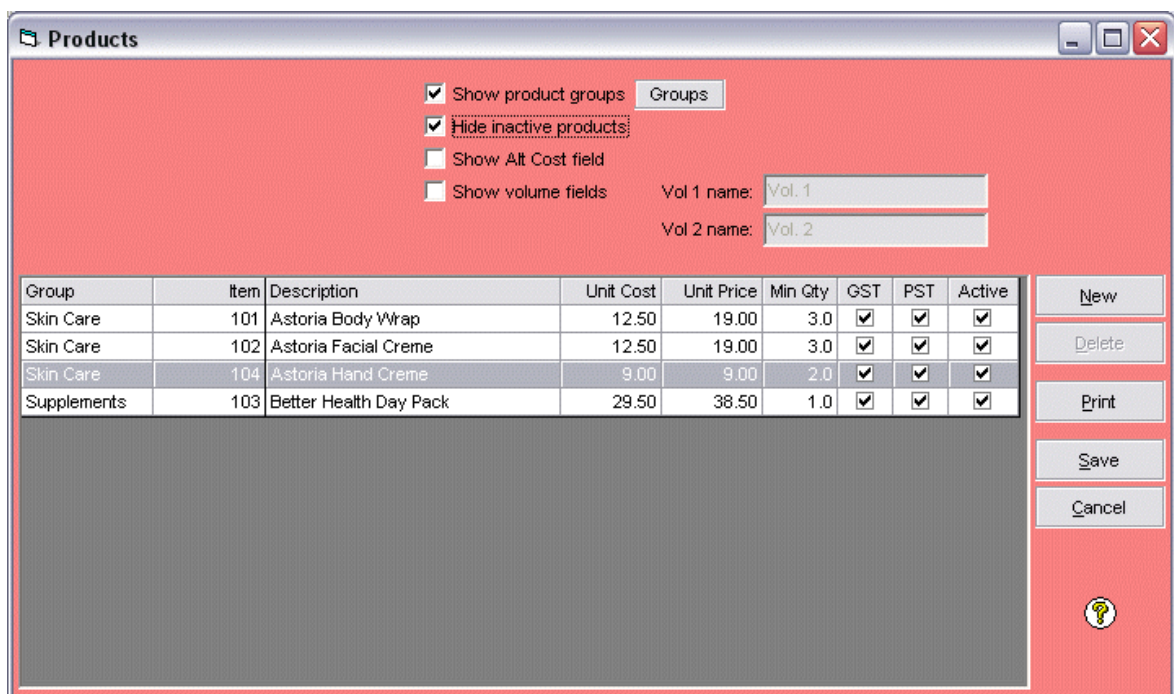
Tax rates for sales are entered using the **Settings** buttons on the **Edit Sales** screen. This window can also be accessed via the **Setup Wizard** option on the **Help** menu and by clicking on the **Tax** label on the **Edit Sales** screen.

To configure your tax settings using the **Tax** tab in the **Sale Settings** window, just do the following:

1. Check the first checkbox if your state, province or country charges sales or VAT tax on any of the products you sell. This setting affects both **Purchases** and **Sales**. Checking or un-checking this box in either the **Purchase Settings** or **Sale Settings** window will cause it to have the same setting in the other window. If none of your products are subject to sales or VAT tax, leave the first checkbox un-checked and click on **Save**. You are finished configuring your tax settings.
2. Check the second checkbox if your state, province or country has two different sales or VAT tax rates for any of the products you sell. This setting affects both **Purchases** and **Sales**. Checking or un-checking this box in the **Purchase Settings** or **Sale Settings** window will cause it to have the same setting in the other window.
3. Check the third checkbox if you would like the program to calculate and enter tax for you on the **Purchases** or **Sales** screen. In general, it is usually easier to *enter tax on product purchases manually*, while allowing the program to calculate and enter the tax for you on product sales.
4. Enter the rate at which some or all of your products are taxed in the **Tax Rate 1** box. The name used to identify this tax rate can be changed by clicking on the label and entering a new name.
5. Select the option describing how this tax rate is applied using the option buttons immediately below the tax rate box. The **Actual Cost** or **Actual Price** and **Actual Cost + Frt** or **Actual Price + Frt** options use the net price of the products *after* any discount is applied in determining the taxable product total. **Business Items** entered on the **Purchases** or **Sales** screen are always assumed to be taxable.

6. Repeat Steps 4 and 5 for your second tax rate if applicable.
7. If you have selected one of the tax options that include tax on freight you may select the option to **Only tax freight allocated to taxable items** if this is how your state or province charges tax. If this option is not selected, freight will always be fully taxed whether or not a PO or Invoice includes other taxable items.
8. Click on **Save** to save your settings and close the window.
9. Click on the **Product** option on the **Categories** menu and set the default taxability for each individual product as appropriate.

6.2.3 Products



Group	Item	Description	Unit Cost	Unit Price	Min Qty	GST	PST	Active
Skin Care	101	Astoria Body Wrap	12.50	19.00	3.0	☒	☒	☒
Skin Care	102	Astoria Facial Creme	12.50	19.00	3.0	☒	☒	☒
Skin Care	104	Astoria Hand Creme	9.00	9.00	2.0	☒	☒	☒
Supplements	103	Better Health Day Pack	29.50	38.50	1.0	☒	☒	☒

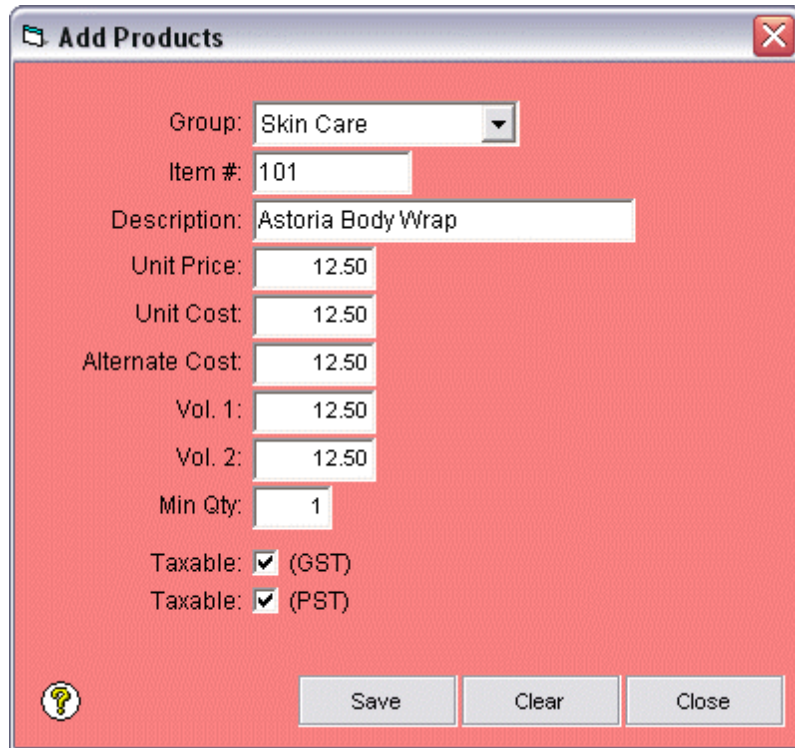
The **Products** window shows the list of products that have been entered or imported into the software. There are four options that affect this display, three of which also affect operation of the program on other screens as follows:

Show product groups	Allows you to associate individual products with "groups" for selecting and reporting purposes
Hide inactive products	Hides inactive products in the Products window (this option only affects the Products window)
Show Alt Cost field	Allows you to specify two different "cost" values for each product
Show volume fields	Allows you to track "volume" on product purchases and sales

 Adding Products

To add a new product to the program, do the following:

1. Click on the **Products** option on the **Categories** menu to display the **Products** window.
2. Click on the **New** button in the **Products** window to display the **Add Products** window.



3. If you have selected the option to "Show product Groups" in the main **Products** window, then select the group you would like to add this product to in the **Group** selection box.
4. Enter the product's **Item #** and **Description** in the boxes provided.
5. Enter the product's retail price in the **Unit Price** box. When you exit from this box all of the visible cost and volume fields will be populated with the entry you made in the **Unit Price** field. For most companies, setting these fields to the retail price of a product is the right thing to do since your "cost" is determined by applying a discount to the retail price. If so you can just tab through the boxes until you get to the **Min Qty** box. If you need to make changes along the way, just tab or click into a box and the program will highlight the existing entry making it easy to overwrite that entry when you type in a new one.
6. Enter the product's wholesale cost in the **Unit Cost** box and its member cost in the **Alternate Cost** box if these values have not already been correctly entered by the program.. If your cost in purchasing products is determined by applying a discount to the retail price then the retail price should be entered into both of these boxes.
7. Enter the volume numbers associated with the product in the **Vol 1** and **Vol 2** boxes (optional).
8. The two "tax" checkboxes at the bottom of the **Product** window will only be "enabled" if you have previously indicated that some or all of your product sales are subject to sales or VAT tax (see [Setting Tax Rates](#)). If the product you are entering is taxable, check one or both of the checkboxes at the bottom of the window to indicate which tax rate(s) this particular product is subject to.

9. Click on **Save** to add this product to the program's list of products.

Editing Product Information

To edit product information, do the following:

1. Click on the **Products** option on the **Categories** menu to display the **Products** window.
2. Locate the product and double click on the entry to be edited.
3. If you are editing the **Item #** field, an entry box will be displayed when you double click to edit. Enter the new item number into the entry box and click on **Save**. If you are editing any other field, simply make your changes in the **Products** window.
4. Click on **Save** to save your changes and close the **Products** window.

Tip: Use the "arrow" keys on your keyboard to navigate quickly in the **Products** window. Using the arrow key to move from one row to the next avoids the need to double click on an entry in order to change it. To quickly set the **Active** or **Tax** status of your products, use the arrow keys to move from one row to the next, and the space bar to check or un-check each checkbox.

Setting Products to Active or Inactive

Products that are set to "Active" are included in all of the program's product selection boxes. Products that are not set to "Active" will only be included in the program's selection boxes and displays if you are displaying or editing a record that was based on the inactive product.

To set a product's **Active** status, do the following:

1. Click on the **Products** option on the **Categories** menu to display the **Products** window.
2. Locate the product and check or un-check its **Active** checkbox.
3. Click on **Save** to save your changes and close the **Products** window.

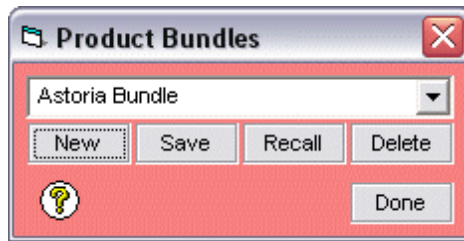
Deleting Products

A product can only be deleted from your product listing if none of your business records depend on that product. If you are unable to delete a product because one or more of your business records depend on it, un-checking the product's **Active** checkbox will remove the product from the program's selection boxes and reports, unless it is needed to edit or display a previously-entered transaction.

To delete a product from the program, do the following:

1. Click on the **Products** option on the **Categories** menu to display the **Products** window.
2. Select the product by clicking on it with your mouse.
3. Click on **Delete** to remove the product from the program's product listing.

6.2.4 Product Bundles



If you always buy and resell product **Bundles** as a unit, and never break them up to sell the individual products, then you are not likely to need this feature. Simply create a single product to represent the bundle using the **Products** option on the **Categories** menu.

If you sometimes break up product **Bundles** into individual products, then the **Bundles** feature can save you considerable time by automatically entering the individual products for you on the **Edit Purchases** and **Edit Sales** screens.

The **Bundles** buttons on the **Edit Purchases** and **Edit Sales** screens display the **Product Bundles** window. This window allows you to save the first 100 lines of product selections on the **Edit Purchases** or **Edit Sales** screen under a name chosen by you. This product bundle can then be recalled at any time to have the information automatically entered on either screen. Purchases and Sales share the same list of product **Bundles**, so creating a package on either screen allows you to access it from either location.

To create a new product package do the following:

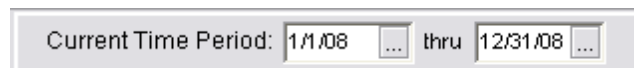
1. Enter the appropriate information on the **Edit Purchases** or **Edit Sales** screen but do not save the transaction.
2. Click on the **Bundles** button to display the **Product Bundles** window.
3. Enter a name to identify this product bundle.
4. Click on **Save**.

To recall a previously saved product package do the following:

1. Click on the **Bundles** button in either the **Edit Purchases** or **Edit Sales** screen to display the **Product Bundles** window.
2. Select the product bundle to be recalled from the list provided.
3. Click on **Recall** to have the information automatically entered on the current screen.

Multiple product **Bundles** can be recalled for a single invoice or purchase order. Each package will be entered starting with the first empty line on the current screen.

6.2.5 Current Time Period



The two date boxes at the top of the screen define the time period that is *currently active* within the program. This time interval is referred to as the **Current Time Period**. There are two things to remember about the **Current Time Period**.

1. The program keeps a record of every transaction you enter, no matter what dates you have set for the **Current Time Period**.
2. The displays and reports in the program default to including only those entries that fall within the **Current Time Period**, so transactions you record may not show up in the program if they are outside of this date range.

The **Current Time Period** allows you to temporarily focus on any period of activity you like. Simply reset the date boxes to reflect the time period of interest. When viewing financial displays (e.g. **Events** or **Invoices**) in the program, you can set whether or not records outside of the **Current Time Period** should be included in the display by checking or unchecking the checkbox that reads "Only show records within the Current Time Period" at the top of each of these windows. When previewing or printing most financial reports, this option is available in the report-filtering window.

6.3 Events

6.3.1 Overview

Overview

The program allows you to create and maintain a list of **Events** and then to associate transactions of all types with these **Events** for reporting purposes. **Events** can be parties, craft shows, trade shows, fundraisers, or any other one-time gathering at which you sold product(s). Associating your financial entries with these events allows you to view reports summarizing event activity.

Event #	Complete	Date	Description	Host	Type	Hours	Referring Host
100001	☐	1/26/06	Party at Margie Brown's	Margie Brown	Business	4	Jane Doe
100003	☐	1/27/06	Party at Sally's	Sally Fisher	Business	4	Jane Doe
100004	☐	2/5/06	Lisa's Party	Lisa Ferris	Business	4	Jane Doe
100005	☐	2/17/06	Jamie's party	Jamie Roberts	Other	4	Jane Doe

The list of available **Events** can be edited using the **Events** option on the **Categories** menu. It can also be accessed using the **Events** buttons on the **Sales** and **Purchases** screens. The **Events** window can be sorted by left clicking on any one of its column headings. The sorted display can also be printed using the **Print** button in the **Events** window. The window will remember its size, the size of each of its columns and its last sort order each time it is opened. Checking or unchecking the box at the top allows you to specify whether or not this display is limited to displaying records within the **Current Time Period**.

6.3.2 Adding an Event

To add an **Event**, just do the following:

1. Click on the **Events** button on either the **Sales** or **Purchases** screen to display the **Events** window or click on the ellipsis (...) button to the right of the **Event** boxes on any of the main financial screens.
2. Click on the **New** button to display the **New Event** window.

New Event

Complete: ☐

Date / Time: 8/1/08 at 7:00 PM

Host: Mosstet, Valorie

Description: Valorie's party

Referring host: Jane Doe

Date booked: 7/11/08

Type: Party

Host Credit Percent: 10 %

Hours worked: 5

Profit estimate: 20 % of Total Retail

Unlinked expenses: 5.00

Linked appointment: 8/1/08 - 7:00 PM to 9:00 PM

Invitees / Attendees

	Status	Name
1	Invitee	Michaels, Jennifer
2	RSVP	Brown, Margie
3	Invitee	Roberts, Claire
4	Invitee	Nicole, Kendall
5	RSVP	Allan, Elizabeth
6	Invitee	Donough, Susan
7	Invitee	Fisher, Sally

Buttons: New, Edit, Del, Print, Add, Remove, Save, Delete, Cancel, Setup, Notes

3. **Date / Time:** Click on the button at the right side of the **Date** box and select the date the event occurred or will occur, then do the same for the **Time**. Dates and times can also be entered by typing directly into the box or using the **Up** and **Down** arrow keys or the **PgUp** and **PgDn** keys to scroll one day or one week at a time respectively.
4. **Host:** Select the host's name from your list of contacts by clicking on the button at the right side of the **Host** box. Names can also be selected by typing directly into the box or using the **Up** and **Down** arrow keys and the **PgUp** and **PgDn** keys to scroll one name or several names at a time respectively. To add a new name to the list directly from this window, click on the second ellipsis (...) button to the right of the **Host** box. This will display the **New Contact** window, allowing you to enter a new contact and add them to your contact database. *Selecting one of your contact as the **Host** for an **Event** simultaneously assigns that person an **Additional Primary Group** of "Past Host" for filtering purposes.*
5. **Description:** Enter a **Description** that will help you to distinguish this **Event** from the others in your list.
6. **Referring Host:** The **Referring Host** field should be filled in automatically based on your selection in the **Host** box. Selecting a **Host** causes the program to search its records to see if this new host attended one of your earlier parties. If so, then the program assumes that the host of that earlier party is the Referring Host of this new party. If no earlier party is found, the program

enters your name as the Referring Host. If the automatic entry in this box is not correct it can be overridden using the ellipsis (...) buttons to the right.

7. **Date Booked:** If the program was able to find a previous Event that this host attended, the date of that previous Event will be entered into the **Date Booked** field. This entry can be overridden by typing or using the ellipsis (...) button to display a pop-up calendar.
8. **Type:** The program allows you to define four different "types" of events. To change the default types click on the ellipsis (...) button to the right of the **Type** selection box.
9. **Host Credit Percent:** Enter your company's recommended host percentage in the **Host Credit Percent** box. The percentage entered into this box will be multiplied by the total retail amount of the Event to arrive at the recommended host credit. (Note: there are several options available via the [Options](#) button on the **Reports** screen that affect the results of the host credit calculation..
10. **Hours worked:** Enter the number of hours you personally worked on this **Event** in the **Hours worked** entry box. If this Event has not yet taken place you can edit this Event later to fill in this entry.
11. **Profit estimate:** Enter the percentage of **Net Event Sales** you would like designated as your personal profit in the **Profit estimate** entry box (e.g. "20").
12. **Unlinked expenses:** Enter any **Event** expenses that will not be linked to this **Event** from the **Income / Expenses** screen, into the **Unlinked Expenses** entry box. This entry is used primarily to allocate a portion of a sample or supply expense to an **Event**. It does not affect your general business records but does allow you to get a more accurate picture of the actual profitability of your events via the **Event Summary** report on the **Reports** screen. Say, for example, that you purchase \$20 worth of product samples, which you then use at several events. You would record the whole \$20 on the **Income / Expenses** screen, leaving the **Event** box empty since there's no single **Event** at which they were all used. You would then allocate the \$20 as appropriate, using the **Unlinked Expenses** entry for the events at which the samples were actually used.
13. **Linked appointment:** If you choose, use the **New** button next to the **Linked Appointment** box to create an appointment in your **Calendar** for the **Event** being added.
14. **Invitees / Attendees:** If this Event has already occurred then there's no need to add the attendees from the **Event** window. As you enter and link each person's order to this Event from the **Sales** screen, their name will be added to the Event automatically. If this Event has not yet occurred and if you would like to use the software to help in planning and preparing for the Event, use the **Add** button beneath the **Invitees / Attendees** box to add people from your contact database. Contacts can be added to your contact database directly from the **Event** window by clicking on **Add** and then clicking on **New**. Adding invitees to an Event before the Event occurs allows you to use the program to send invitations (email or printed) and to stay in touch with the invitees prior to the date of the Event.

Note: Names that are listed in this box because they are listed as the customer on a sales order that's linked to this Event cannot be removed using the **Remove** button. To remove a customer's name from this list you will need to edit their sale and change or remove the **Event** entry.

6.3.3 Editing or Deleting an Event

To edit or delete an existing **Event** just double click on the **Event** or click once on it and then click on **Edit**. This will display the **Edit Event** window allowing you to make changes or delete the **Event** entirely. Deleting an event with which you have previously associated one or more sales will not affect your sales from a financial standpoint, but will remove all references to the deleted **Event** from the associated sales records.

For more information on the individual fields in the **Edit Event** window please see [Adding an Event](#).

Edit Event: 100006

Complete: ☐

Date / Time: 8/1/08 at 7:00 PM

Host: Michaels, Jennifer

Description: Jennifer's Party

Referring host: Jane Doe

Date booked: 7/6/08

Type: Business

Host Credit Percent: 10 %

Hours worked: 5

Profit estimate: 20 % of Total Retail

Unlinked expenses: 0

Linked appointment:

Invitees / Attendees

	Status	Name
1	Invitee	Jacobs, Marie
2	Invitee	Savoy, Linda
3	Invitee	Roberts, Jamie
4	Invitee	Nicole, Kendall
5	Invitee	Calloway, Carrie
6	RSVP	Roberts, Claire
7	RSVP	Smith, Mary
8	RSVP	Donough, Susan

Buttons: New Edit Del Print Add Remove Save Delete Cancel

Side Panel: Notes Setup

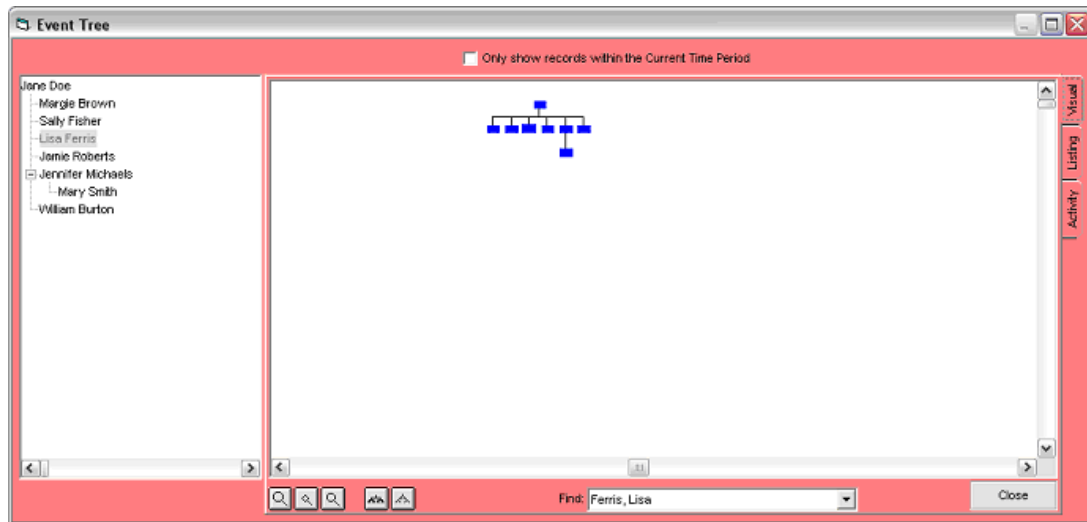
6.3.4 Viewing Your Event Referral Network

Whenever you add a new event using a **Host** who was a customer at an earlier event, the program will locate the previous invoice and enter the name of the referring host in the **Last Host** box in the **Events** window. If the program is unable to locate a referring host, it will prompt you to select one from your list of **Events** or to specify yourself as the referral source. This referral network can be displayed visually, by clicking on the **View** button in the **Events** window to display the **Event Tree** window.

The **Event Tree** window, like the **Team** screen, offers three different views.

- Visual:** Shows a hierarchical display of your host referral network.
- Listing:** Allows you to quickly access contact information for any past host.
- Activity:** Shows summary financial numbers for each of your parties.

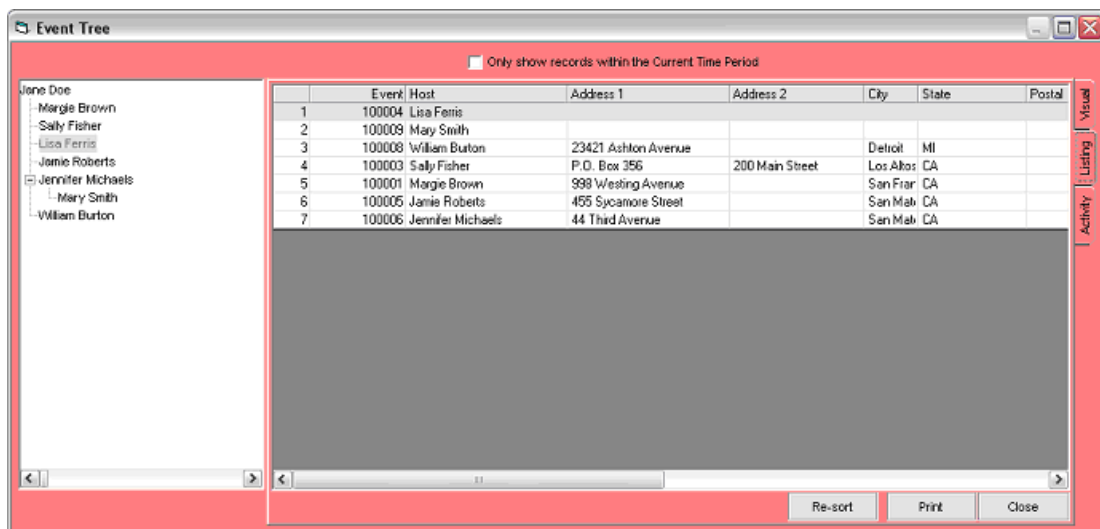
Visual View



In the **Visual** view, all of your past hosts are displayed in a hierarchical "tree" diagram with the currently selected host / party shown in bold. Use the magnifying-glass buttons to change the display's magnification or to reset it to its default position and magnification. Holding the CTRL key down while clicking either of the zoom buttons allows you to change the zoom setting more quickly. The rightmost magnifying-glass button sets the magnification back to its default value and re-centers the display around the topmost node. To view off-screen portions of your team use the horizontal and vertical scrollbars. Scrolling can also be accomplished by dragging the diagram using your mouse. To do this, left click directly on the diagram, then move your mouse while continuing to hold the mouse button down.

Event information can be displayed for whichever node the mouse is currently over, by right clicking once anywhere in the **Visual** view. Left clicking turns the **Event** information display off.

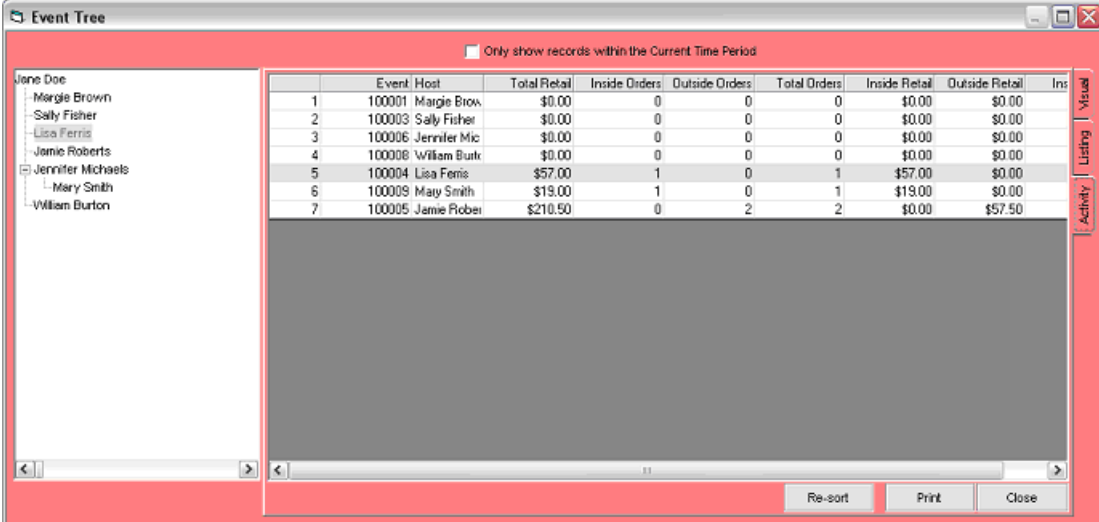
Listing View



In the **Listing** view, host contact information is displayed in a table with the currently selected

host highlighted in blue. Hosts who are hidden from view in the Explorer hierarchy are also hidden from view in the **Listing** view grid. To display hosts that are hidden, click on the plus sign next to their referring host in the Explorer hierarchy or just double click on their referring host's name. Clicking on any of the column headings in the **Listing** view causes the display to be sorted based on the entries in the column. Clicking on it again reverses the sort order. After sorting, the entries in the **Listing** display may not be aligned with their counterparts in the Explorer hierarchy on the left side of the **Events Tree** window. To re-order the **Listing** view display so that it's in the same order as the hierarchy on the left, just click on the first column in the display to sort it based on its row numbers. The program will remember your last **Listing** view sort order and will sort the display in the same manner the next time the window is opened.

Activity View



Event Tree

☐ Only show records within the Current Time Period

	Event	Host	Total Retail	Inside Orders	Outside Orders	Total Orders	Inside Retail	Outside Retail	Ins
1	100001	Margie Brown	\$0.00	0	0	0	\$0.00	\$0.00	
2	100003	Sally Fisher	\$0.00	0	0	0	\$0.00	\$0.00	
3	100006	Jennifer Mic	\$0.00	0	0	0	\$0.00	\$0.00	
4	100008	William Butk	\$0.00	0	0	0	\$0.00	\$0.00	
5	100004	Lisa Ferris	\$57.00	1	0	1	\$57.00	\$0.00	
6	100009	May Smith	\$19.00	1	0	1	\$19.00	\$0.00	
7	100005	Jamie Rober	\$210.50	0	2	2	\$0.00	\$57.50	

Re-sort Print Close

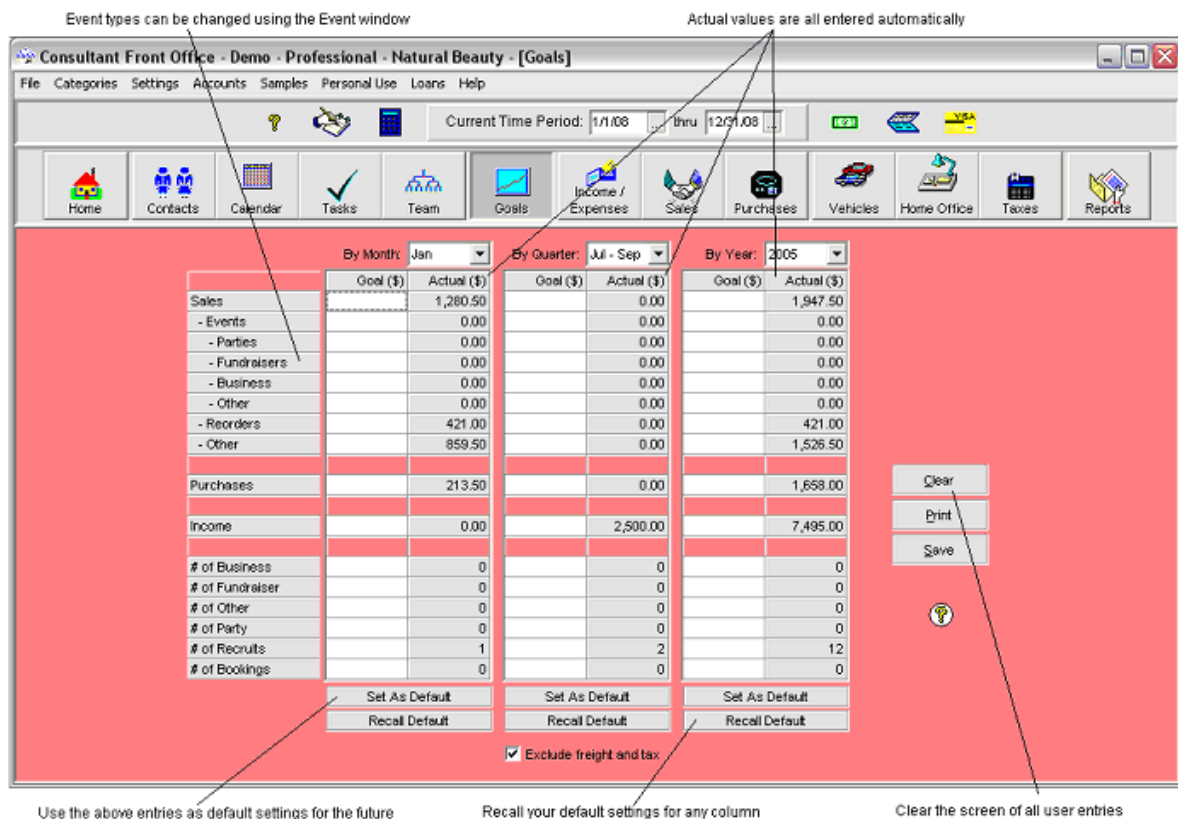
The **Activity** view contains a display summary for each of your **Events**. **Events** that are hidden from view in the Explorer hierarchy are also hidden from view in the **Activity** view grid. To display hidden **Events**, click on the plus sign next to their referring host in the Explorer hierarchy or just double click on their referring host's name. Clicking on any of the column headings in the **Activity** view causes the display to be sorted based on the entries in the column. Clicking on it again reverses the sort order. After sorting, the entries in the **Activity** display may not be aligned with their counterparts in the Explorer hierarchy on the left side of the **Events Tree** window. To re-order the **Activity** view display so that it's in the same order as the hierarchy on the left, just click on the first column in the display to sort it based on its row numbers. The program will remember your last **Activity** view sort order and will sort the display in the same manner the next time the window is opened.

6.4 Goals

6.4.1 Overview

The **Goals** screen is used to enter your business goals and to track your progress against these goals. Monthly, quarterly and yearly goals can be entered and tracked with your actual results

displayed immediately alongside the goals value, allowing you to quickly see how you're doing in reaching your objectives.



☐ Entering Your Goals

To enter your business goals into the **Goals** screen first make sure that you have selected the desired time periods, using the **By Month**, **By Quarter** and **By Year** selection boxes at the top of the **Goals** screen. The **By Month** and **By Quarter** time periods are always based on whatever year is currently displayed in the **By Year** selection box. Once the time periods have been set, simply fill in some or all of the **Goals** fields for each of the three periods.

☐ Setting and Recalling Default Goals

An easy way to enter values for more than one time period is to use the **Save As Default** buttons to take a snapshot of whatever goals are currently entered in each of the columns on the **Goals** screen. Then just change the time period for that column and use the **Recall Default** button to fill in the goals entries with your default values. Any changes you make after recalling the default values will be saved for that time period without changing your default settings.

☐ Clearing The Goals Screen

The **Clear** button on the **Goals** screen clears all of the goals fields in each of the three time periods. You will be asked to confirm this operation before the fields will actually be cleared.

Printing The Goals Screen

The **Print** button on the **Goals** screen allows you to preview and then print exactly what is currently visible on the screen. If the checkbox that reads "Exclude freight and tax" is checked at the time the screen is printed this will be noted in the report heading.

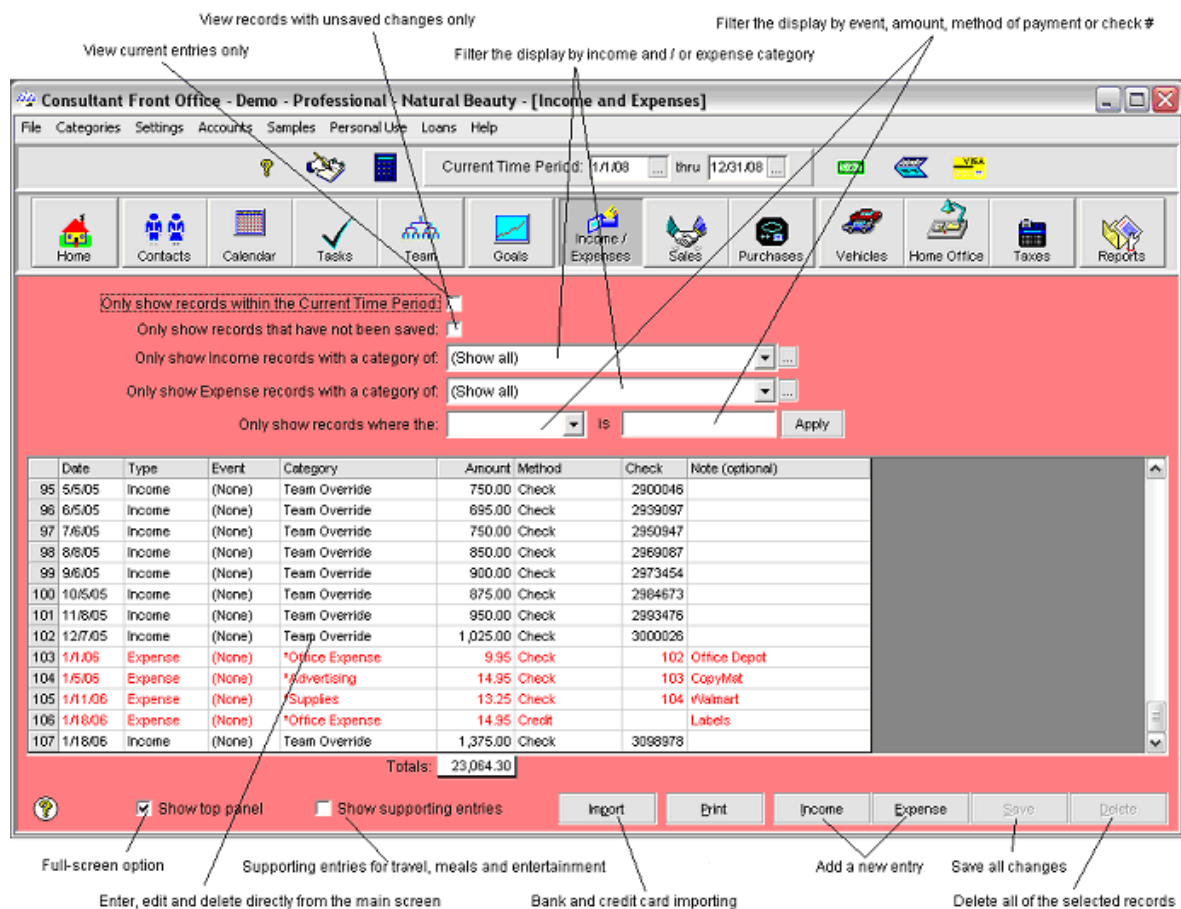
Excluding Freight and Tax

The "Exclude freight and tax" checkbox instructs the program to exclude the value of all **Freight** and **Tax** entries in calculating the **Actual** values displayed on the **Goals** screen. This allows you to focus more clearly on your actual retail sales numbers if you choose.

6.5 Income and Expenses

6.5.1 Overview

The **Income / Expenses** screen is used to enter all types of income and expenses except for product purchases (from your company) and sales (to your customers). Commission checks, office supplies, party favors and travel expenses are all examples of the types of entries you might make on this screen.



6.5.2 Entering Income and Expenses

To make a new income or expense entry, just do the following:

1. Click on the **Income** or **Expense** button in the lower right corner of the screen to add a new row to the display. Clicking on either of these buttons also checks the "Only show records that have not been saved" checkbox, causing the screen to temporarily display only the new records you are working on.
2. **Date:** Click in the **Date** field and either type a date or use the ellipsis (...) button to display a pop-up calendar. Dates can also be entered or adjusted using the **Up** and **Down** arrow keys in combination with the **Shift** key to scroll one day at a time.
3. **Type:** Assuming you clicked on the correct button (**Income** or **Expense**) in Step 1 you should not need to adjust the type of record being entered. To change the type, either type an "i" or an "e" or make a new selection with your mouse.
4. **Event:** If the income or expense happened in association with an **Event**, select that event in the **Event** field. This will cause your entry to be included in reports that are filtered by event, including the "Event Summary" report on the **Reports** screen.
5. **Category:** Select the appropriate category by typing or by clicking on the button at the right side

of the box and then clicking on one of the names in the dropdown list. Categories can also be selected using the **Up** and **Down** arrow keys in combination with the **Shift** key to scroll one item at a time. To add new categories or edit existing ones, click on the **Income** or **Expenses** option on the **Categories** menu.

6. **Amount:** Enter the amount of the income or expense in the **Amount** box.
7. **Method:** Select the method of payment in the **Method** box by typing or by clicking on the button at the right side of the box and then clicking on one of the items in the dropdown list (optional). Use the "(other)" payment options for expenses to indicate that an expense was not paid from one of your primary business accounts. While this does not affect your actual business or tax records, it prevents the entry from being "rolled up" into your **Cash**, **Checking** or **Credit** account registers.
8. **Check #:** Enter the check number in the **Check #** box (if applicable).
9. **Note:** Enter a note or comment in the **Note** box (optional).
10. Click on the **Save** button to save your entries. This also unchecks the "Only show records that have not been saved" checkbox causing previously-saved records to be once again displayed.

6.5.3 Editing Income and Expense Entries

To edit a previously recorded income or expense entry, just do the following:

1. Double click on the entry to be changed.
2. Make the desired change.
3. Repeat Steps 1 – 2 for additional changes.
4. Click on **Save** to save all of your changes.

Tastefully Simple Edition of Consultant Front Office - Professional (full inventory) - Natural Beauty - [Income and Expenses]

File Categories Settings Accounts Samples Personal Use Loans Trades Inventory Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Only show records within the Current Time Period: ☐
 Only show records that have not been saved: ☐
 Only show Income records with a category of: (Show all)
 Only show Expense records with a category of: (Show all)
 Only show records where the: is

Date	Type	Event	Category	Amount	Method	Check	Note (optional)
1 6/5/08	Expense	(None)	*Utilities	56.79			Phone Bill
2 5/1/08	Expense	(None)	*Utilities	38.90			Phone Bill
3 5/1/08	Expense	(None)	*Office Expense	104.25			Fax / prtr. supplies
4 4/2/08	Expense	(None)	*Utilities	43.57			Phone Bill
5 3/3/08	Expense	(None)	*Utilities	47.34			Phone Bill
6 3/1/08	Expense	(None)	*Office Expense	50.00			Copies
7 2/12/08	Income	(None)	Direct Sales Bonus	197.00			Income Ctr. 1
8 2/7/08	Income	(None)	Direct Sales Bonus	197.00			Income Ctr. 2
9 2/6/08	Expense	(None)	*Office Expense	25.00	Check	101	Network Marketing Lifestyles
10 2/4/08	Expense	(None)	*Utilities	42.60			Phone Bill
11 2/3/08	Expense	(None)	*Office Expense	35.00	Credit		Stationery
12 1/25/08	Expense	(None)	*Travel	99.00			Training
13 1/25/08	Expense	(None)	*Meals and Entertainment	12.63			Training
14 1/24/08	Expense	(None)	*Travel	135.00			Training
15 1/24/08	Expense	(None)	*Travel	99.00			Training
16 1/24/08	Expense	(None)	*Meals and Entertainment	10.50			Training
17 1/16/08	Expense	(None)	*Office Expense	14.95	Credit		Labels
Totals:				23,064.30			

6.5.4 Deleting Income and Expense Entries

To delete one or more **Income** or **Expense** entries, do the following:

1. Click on the row to be deleted. Hold down your CTRL key while clicking to select more than one row at a time.
2. Click on **Delete** to remove the selected entry(ies).
3. Click on **OK** when prompted to confirm the delete operation.

6.5.5 Travel, Meals and Entertainment

Tax agencies generally require additional supporting information to substantiate expenses based on travel, meals and entertainment. **Consultant Front Office** provides extra fields on the **Income / Expenses** screen for these entries whenever the "Show supporting entries" checkbox on the **Income / Expenses** screen is checked.

You can instruct the program to require that these entries be completed when recording travel, meals and entertainment expenses using the **Preferences** option on the **Settings** menu ("Require supporting entries for Expenses" on the **Financial** tab).

These entries then become part of your permanent records. All of these entries can be reviewed or printed from the **Income / Expenses** screen or using the **Expense – History** report option on the **Reports** screen.

6.5.6 Importing Income and Expense Data

▣ Working With An Assistant

Income and expense entries can be exported and imported using the **Export – Miscellaneous** and **Import – Miscellaneous** functions on the **File** menu. This function uses the "ezx" file format and is not compatible with files generated by other financial programs or institutions, but it does allow you to import entries made by an assistant without overwriting changes made on your own computer.

▣ Importing Bank and Credit Card Statements

Income and expense entries can also be imported using industry standard Microsoft Money (OFX) and Quicken (QIF and QFX) file formats to eliminate data entry and prevent missed entries. These types of files are imported using the **Import** button on the **Income / Expenses** screen.

6.6 Sales

6.6.1 Overview

The **Sales** screen is used to enter all income resulting directly from the sale of products. In the "full-inventory" edition of the program, products entered as part of a sale **Sales** are automatically removed from your personal inventory when the transaction is saved.

The main **Sales** screen shows a listing of all of the invoices you have entered into the program, unless some of those invoices are hidden due to the "Only show records within the Current Time Period" checkbox at the top of the screen being checked. Invoices can be customized, emailed (Standard and Professional only), previewed and printed by clicking on the **Invoices** button.

Credit card payments can also be uploaded to a ProPay™ merchant account using the **ProPay** button on the **Sales** screen (Standard and Professional only). Uploading payments to ProPay from **Consultant Front Office** makes it unnecessary to go to the ProPay website to charge your customers' credit cards. It also allows you to delay payments until a specific date (e.g. half now, half a week from now) with the system keeping track of when those payments become due.

Highlight / select entries with one or more undelivered item(s)
View current entries only
Highlight / select entries with one or more credit card payments that have not been uploaded to ProPay
Mark all selected entries as delivered or processed

Consultant Front Office - Professional - Natural Beauty - [Sales]

File Categories Settings Accounts Samples Personal Use Loans Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Only show records within the Current Time Period:
Highlight invoices with items that have not been delivered: ☐ ☐ Select highlighted Mark selected records as delivered
Highlight invoices with unprocessed credit card payments: ☐ ☐ Select highlighted Mark selected records as processed

Only show records where the: is Apply

	Date	Invoice	Customer	Comment	Event	Product	Supplies	Disct.	Frt.	GST	PST	Credit	Gr. Total	Method	Check	Balance
1	1/3/05	1008	Savoy, Linda		(None)	95.00	0.00	0.00	7.73	2.29	0.00	0.00	105.02	Cash		0.00
2	1/7/05	1009	Taylor, John		(None)	95.00	0.00	0.00	7.73	2.29	0.00	0.00	105.02	Check	8237	0.00
3	1/18/05	1005	Nichols, Steve		(None)	344.50	0.00	0.00	21.45	1.50	0.00	0.00	367.45	Cash		0.00
4	1/20/05	1000	Janitzen, Robert		(None)	153.00	0.00	0.00	10.91	12.62	0.00	0.00	176.53	Check	554	0.00
5	1/20/05	1006	Michaels, Jennifer		(None)	190.50	0.00	0.00	12.98	0.91	0.00	0.00	204.39	Check	9838	0.00
6	1/20/05	1007	Roberts, James		(None)	326.00	0.00	0.00	20.43	1.43	0.00	0.00	347.86	Cash		0.00
7	1/25/05	1001	Loren, Gregg		(None)	76.50	0.00	0.00	6.71	6.31	0.00	0.00	89.52	Cash		0.00
8	2/20/05	1003	Taylor, John		(None)	229.50	0.00	0.00	15.12	18.93	0.00	0.00	263.55	Various		0.00
9	3/15/05	1004	Masters, Claire		(None)	76.00	0.00	0.00	6.68	6.27	0.00	0.00	88.95	Cash		0.00
10	5/15/05	1016	Nicole, Kendall		(None)	101.45	24.95	0.00	7.87	8.37	0.00	0.00	117.69	Cash		0.00
11	5/28/05	1018	Goldsmith, Jamie		(None)	95.00	0.00	0.00	7.73	0.54	0.00	0.00	103.27	Credit		0.00
12	6/1/05	1017	Calloway, Charles		(None)	190.00	0.00	0.00	12.95	14.21	0.00	0.00	217.16	Check	1112	0.00
13	2/5/06	1010	Allan, Elizabeth		100004	57.00	0.00	0.00	6.50	0.46	0.52	0.00	64.48	Check	123	0.00
14	2/5/06	1011	Janitzen, Sarah		(None)	133.50	0.00	0.00	9.84	10.03	11.47	0.00	164.84	Various		0.00
15	2/17/06	1002	Roberts, Jamie	Host Order	100005	153.00	0.00	0.00	10.91	12.62	0.00	0.00	176.53	Check	423	0.00
Totals:						2,373.45	24.95	0.00	172.04	103.26	17.11	0.00	2,665.86			

☒ Show top panel

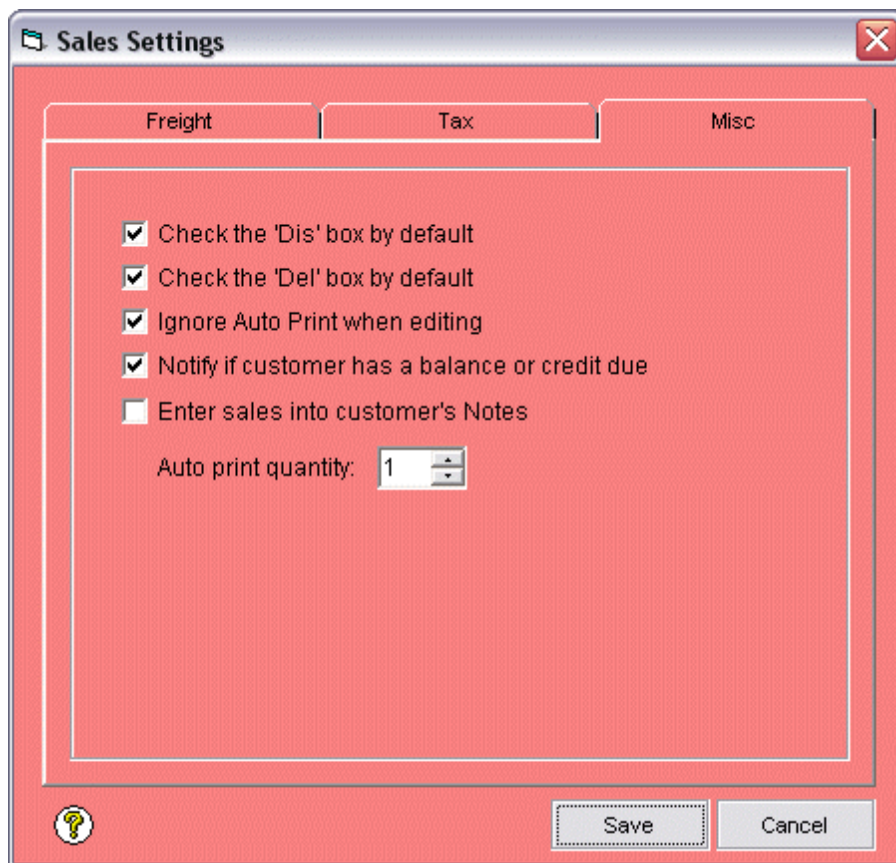
ProPay Events Invoices Print New Delete

Full-screen option
Upload credit card payments to ProPay
Add, edit or delete an event (party, fundraiser etc.)
Preview, print or email invoices
Open the Edit Sales window
Delete all selected entries

6.6.2 Settings

The **Sales Settings** window is displayed by clicking on the **Settings** button on the **Edit Sales** screen. Freight and tax setting instructions for this window can be found using the links above (**Related Topics**).

The **Misc** tab of the **Sales Settings** window is used to customize the **Edit Sales** screen to your liking. The generally recommended settings are shown below but feel free to change any of these to fit your style of doing business.



- | | |
|---------------------------------|--|
| Check the Dis box... | Instructs the program to put a checkmark in the Discounted checkbox whenever a product is selected on the Edit Sales screen |
| Check the Del box ... | Instructs the program to put a checkmark in the Delivered checkbox whenever a product is selected on the Edit Sales screen. |
| Ignore Auto Print ... | Instructs the program not to automatically print invoices when editing |
| Notify if a customer ... | Instructs the program to display a warning at the top of the Edit Sales screen when a customer is selected who has an outstanding balance on their account |
| Enter sales into ... | Instructs the program to enter a list of the products purchased into each customer's contact Notes . While this may seem desirable, it's generally unnecessary since a customer's purchase history is readily available from the Edit Contacts screen. |
| Auto print quantity | Tells the program how many invoice copies to print when a sale is saved. |

6.6.3 Entering Sales

6.6.3.1 Overview

Item #	Description	Qty	Unit Price...	Extd. Price	Note (optional)	Dis	Tax	Tax	Del
1	101 Astoria Body Wrap	1.0	19.00	19.00		☐	☒	☒	☐
2	102 Astoria Facial Creme	1.0	19.00	19.00		☐	☒	☒	☐
3						☐	☐	☐	☐
4						☐	☐	☐	☐
5						☐	☐	☐	☐
6						☐	☐	☐	☐
7						☐	☐	☐	☐
8						☐	☐	☐	☐
9						☐	☐	☐	☐
10						☐	☐	☐	☐

Date: 8/1/08 Total Qty: 2.0 **SUBTOTAL:** 38.00
 Invoice #: 1014 ☒ Auto number Supplies:
 Customer: Nicole, Kendall Discount: %
 Comment: Freight: 6.50 (\$4.00 | \$2.50 | 5.50%)
 Event: 100006 Jennifer's Party GST / PST: 3.12 3.56 (7.000% | 8.000%)
 Method / Code: Credit Credit:
☒ Inside order ☐ Host order **GRAND TOTAL:** 51.18
☒ Potential Host ☐ Reorder Balance Due: 0.00
☐ Booked Event ☐ Commission only
☒ Potential Recruit ☐ Auto print

Customer #100030
1115 Ruby Avenue
San Carlos CA 94070

Settings Convert Bundles New Save Cancel

Product sales are entered on the **Edit Sales** screen. This screen can be opened by clicking on the **New** button on the main **Sales** screen or by double clicking on an invoice in the main **Sales** screen. Up to 150 line item entries can be made on a single invoice

Here are the basic instructions for entering a sale. The links at the end of some of these steps contain more detailed information regarding that specific entry.

1. Click on the **Sales** button on the main program toolbar to go to the **Sales** screen.
2. Click on the **New** button on the **Sales** screen to open the **Edit Sales** window.
3. **Date:** Enter the date you actually sold the products either by typing or using the pop-up calendar. Dates can also be adjusted using the up and down arrow keys and the **PgUp** and **PgDn** keys.
4. **Invoice #:** Check the box and let the program enter numbers automatically ([Invoice No](#)).
5. **Customer:** Select the customer's name from your list of contacts ([Customer](#)).
6. **Comment:** Enter a note regarding the sale (optional - [Invoice Comment](#)).
7. **Event:** Select the **Event** this sale is associated with (optional - [Event](#)).
8. **Method:** Select the method of payment or leave blank if unpaid ([Pay Method](#)).
9. **Check #:** Enter the check number in the **Check #** box if applicable.
10. **Inside Order:** Check this box if the sale being recorded occurred at the selected **Event** ([Inside Order](#)).
11. **Potential Host:** Check this box if the customer expressed interest in hosting an **Event** of their own ([Potential Host](#)).
12. **Booked Event:** Check this box if the customer booked an **Event** while making this purchase ([Booked Event](#)).
13. **Potential Recruit:** Check this box if the customer is interested in your business opportunity ([Potential Recruit](#)).

14. **Host Order:** This box should be checked automatically if the **Customer** you have selected is also the host of the Event that is selected for this sale ([Host Order](#)).
15. **Reorder:** This box will be checked automatically if a previous sale for this **Customer** has been entered. If a previous sale occurred but is not in the program you will need to check this box manually to have the sale treated as a reorder for reporting purposes.
16. **Commission only:** This box is only to be used to enter sales for which you do not receive payment except in the form of a commission ([Commission Only](#)).
17. **Group:** Select the **Group** to which the first item belongs. Selecting a Group will rebuild the lists of products in the **Item #** and **Description** fields based on your Group selection. The **Group** field will only be visible on the **Edit Sales** screen if the "Show product Groups" option has been selected using the **Products** option on the **Categories** menu ([Group](#)).
18. **Item # / Description:** Select the product you sold by typing or by clicking on the button at the right side of either the **Item #** box or the **Description** box and then clicking on the correct item. Pressing the **Delete** key on your keyboard in either the **Item #** or **Description** box clears all of the entries on that line ([Item No](#)).
19. **Qty:** Enter the quantity sold in the **Qty** box.
20. **Unit Price / Extd Price:** If the selling price was different than the default value that was automatically entered in the **Unit Price** box you can change it by simply typing a new value into the box. If this item's **Qty** is more than 1, you can also enter a total price in the **Extd. Price** box and the program will calculate the corresponding **Unit Price** box for you ([Unit Price](#)).
21. **Note:** Enter a **Note** or comment regarding this line item in the **Note** box (optional).
22. **Dis / Tax:** Select the "discountability" (**Dis**) and "taxability" (**Tax**) of this line item using the checkboxes at the end of the line. Percentage discount factors are only applied to line items that have their **Dis** box checked ([Discountability and Taxability](#)).
23. **Del:** If the product has already been delivered to your customer, check the "delivered" (**Del**) checkbox at the end of the line. If the product has not been delivered to your customer leave the box unchecked. This box is for reference and reporting purposes only. If you are using the full-inventory edition of the program checking or unchecking the **Del** box will not affect your inventory count.
24. Repeat Steps 15 – 21 for each item that you sold.
25. **Supplies:** If you are selling any business supplies enter the total amount into the **Supplies** box on the **Edit Sales** screen.
26. **Discount:** Enter a fixed discount amount or a percentage discount factor in the **Discount** boxes provided (optional - [Discountability and Taxability](#)).
27. **Freight:** In general, you will probably want the program to enter freight for you automatically (see [Setting Freight Rates](#)).
28. **Tax:** In general, you will probably want the program to enter tax for you automatically (see [Setting Tax Rates](#)).
29. **Credit:** This box is typically used to enter a "Host Credit". A **Credit** is similar to a **Discount**, except that it does not affect the calculation of freight or tax and it can be used to offset the freight and tax in determining the **Total** amount of the sale (optional).
30. **Balance Due:** Enter any partial payment information using the button just to the right of the **Balance Due** box (Standard and Professional only). This button displays the [Payment History](#) window, which allows you to keep track of up to ten separate payments on each individual sale. If a **Method** of payment has been specified, the program will automatically create a default payment record for the **Total** amount of the sale ([Receivables](#)).
31. Click on **Save** to save your entries.

If you later discover that you made a mistake in one of your entries, simply double click on the invoice in the main **Sales** window to open it back up for editing.

6.6.3.2 Invoice No.

Enter the invoice number you will use to refer to the sale being recorded. Consultant Front Office will automatically enter the next available invoice number for you, if the **Auto number** checkbox next to the **Invoice #** entry box is checked.. To set invoice auto numbering to a new starting point, just enter the new beginning invoice number when you record your next sale.

6.6.3.3 Customer

Select the name of the person who purchased the product(s) from you. All of your currently filtered contact listings are available for selection in the **Customer** box.

To add a new customer to the list or to enter a customer name for this invoice only, click on the second ellipsis (...) button to the right of the **Customer** box. This will display the **New Contact** window, allowing you to enter a name, and select whether this name should be added to your contact database (**Add Contact**) or saved only in association with this invoice (**Invoice Only**).

The second ellipsis button can also be used to edit an existing customer's information or to add to their **Notes** after selecting their name in the **Customer** box on the **Sales** screen.

The screenshot shows a 'New contact' dialog box. It has a title bar with the text 'New contact' and a close button. Inside the dialog, there are three radio buttons: 'New contact' (which is selected), 'Modify contact', and 'Invoice only'. Below these is a large text area containing the text '6/5/11: Booked for 9/18. Is very excited and wants me to help her get ready!'. To the right of the text area are two tabs: 'Notes' and 'Listing'. At the bottom left of the dialog is a help icon (a question mark inside a circle). At the bottom right are 'OK' and 'Cancel' buttons.

The pop-up contact window does not allow you to enter everything that can be entered on the main **Contacts** screen. If you would like to enter additional information, you may want to enter customer information first on the **Contacts** screen, then come back to the **Sales** screen to enter their order.

6.6.3.4 Comment

Enter a brief **Comment** describing the sale being recorded (optional). This **Comment** can be included on your printed invoices by selecting the appropriate option in the **Customize Invoices** window.

6.6.3.5 Event

Select the **Event** (if any) that this sale is associated with. If this sale occurred at a party, trade show or other type of **Event**, and you would like to be able to get reports based on this **Event**, select the corresponding **Event** number from the available list. The list of available events can be edited directly from the **Edit Sales** screen by clicking on the button just to the right of the **Event** boxes. This button displays the **Events** window, showing a list of your previously defined events. Clicking on an **Event** and then clicking on **Select** allows you to select an **Event** for the **Edit Sales** screen directly from the **Events** window.

6.6.3.6 Payment Method

Select the method of payment used to purchase the products being sold. **Electronic** payments are automatically deposited into your checking account. **Cash, Check** and **Credit / Debit** transactions can also be automatically deposited into your checking account if the associated options have been selected using the **Preferences** option on the **Settings** menu.

In general, it's usually best not to have the program automatically deposit income into your checking account since these individual transactions won't match up with your actual deposits. It's usually better to leave these auto-deposit options turned off and make deposits into your checking account manually, using the **Adjust** button in the **Checking** account window.

6.6.3.7 Inside Order

Check the **Inside Order** box if the sale being recorded occurred at the event you selected in the **Event** box on the **Edit Sales** screen. This box is only visible when an event number has been selected. Checking this box also sets the **Date** box on the **Edit Sales** screen to the date of the selected **Event** and instructs the program to count the sale as an "inside order" in the **Event Summary** and **Host Summary** reports.

To enter a sale that was the result of an **Event** but did not actually occur at the event, select the event in the **Event** box on the **Edit Sales** screen but leave the **Inside Order** box unchecked.

6.6.3.8 Potential Host

Check the **Potential Host** checkbox if the customer for this sale has expressed interest in hosting an event of their own. The customer's name will then appear in the list of "Potential Hosts" in the **Event Summary** and **Host Summary** reports. The customer's will also be assigned an **Additional Primary Group of Potential Host** for filtering purposes on the **Contacts** screen.

6.6.3.9 Booked Event

Check the **Booked Event** checkbox if the customer for this sale has booked their own party or event. The customer's name will then appear in the list of Bookings in the **Event Summary** and **Host Summary** reports.

6.6.3.10 Potential Recruit

Check the **Potential Recruit** checkbox if the customer for this sale expresses an interest in getting involved in the business. The customer's name will then appear in the list of Potential Recruits in the **Event Summary** and **Host Summary** reports. The customer's will also be assigned an **Additional Primary Group of Potential Recruit** for filtering purposes on the **Contacts** screen.

6.6.3.11 Host Order

This box will be checked automatically based on the **Customer** and **Event** selections on the **Edit Sales** screen. The Host Order is reported separately in the **Event Summary** and **Host Summary** reports on the **Reports** screen.

6.6.3.12 Reorder

The **Reorder** checkbox will be automatically checked whenever you select a **Customer** who has purchased product(s) from you in the past. You can also check the box manually if the previous purchase has not been entered into the program. If the **Reorder** checkbox is checked when a sale is recorded, the customer's contact listing will be assigned an **Additional Primary Group of Reorder Customer** for filtering purposes on the **Contacts** screen.

To avoid double counting on some reports, sales which are associated with an **Event** cannot also be marked as **Reorders**. For this reason, the **Reorder** checkbox is automatically cleared and disabled (grayed out) whenever an **Event** is selected on the **Edit Sales** screen.

Reorder activity can be summarized for any time period you choose using the **Reorder Summary** report on the **Reports** screen. Reorder activity is also summarized in the **Monthly Summary** report.

6.6.3.13 Commission Only

Checking the "Commission only" box when you enter a sale causes the program to ignore the transaction from a financial standpoint. Checking this box in the "full-inventory" edition of the program also causes the program to ignore the inventory implications of the sale, thus leaving your inventory count and value unchanged. This allows you to enter sales into your system for which you did not personally receive payment except in the form of a commission.

Commission-only sales often occur directly through your company's website, though they may also occur anytime you get paid using a credit card, if your company processes the credit card payment on your behalf. **The key factor here is whether you directly receive payment for the products that were sold.** If you receive payment directly and the payment gets deposited into your business bank account, leave the "Commission only" box unchecked. If the only payment you receive is in the form of a commission, then check the box and enter the commission when you receive it on the **Income / Expenses** screen.

Entering commission-only sales allows you to use all of the program's filtering, searching and follow-up capabilities for sales that could otherwise not be entered into your system.

6.6.3.14 Selecting Products

6.6.3.14.1 Group

The **Group** column will only be displayed if you've checked the "Show product groups" checkbox under the **Products** option on the **Categories** menu. Product Groups can make it easier to select products quickly if your company offers a large number of products with somewhat similar descriptions.

Select the product Group by clicking on the button at the right side of the **Group** box and then clicking on the correct item. Selecting a **Group** causes the program to generate the list of products that are in that Group and put that list into the **Item #** and **Description** selection lists. Product Groups can also be selected by typing directly into the box or using the **Up** and **Down** arrow keys in combination with the **Shift** key. To add a new product Group or modify information for an existing one use the **Products** option on the **Categories** menu or right click when the cursor is in one of the **Group** boxes (Categories Menu - Products).

6.6.3.14.2 Item No.

Select the product being sold by typing or by clicking on the button at the right side of either the **Item #** box or the **Description** box and then clicking on the correct item. Selecting either an **Item #** or a **Description** will automatically select its counterpart in the associated box. Item numbers and descriptions can also be selected using the **Up** and **Down** arrow keys in combination with the **Shift** key. To add a new product or modify information for an existing one use the **Products** option on the **Categories** menu or right click when the cursor is in one of the **Item #** or **Description** boxes (Categories Menu - Products).

6.6.3.14.3 Unit Price

If the price is different than the default value automatically entered in the **Price** box you can change it by simply typing a new value into the **Price** box. If the quantity is more than 1, you can also enter a total price in the **Extd. Price** box and the program will enter the corresponding unit price in the **Price** box for you. Default product pricing can be changed using the **Product** option on the **Categories** menu.

You can also choose to use the **Unit Cost** or **Alt Cost** field as the source of a product's price on the **Sales** screen. To do this, simply click on the **Unit Price...** column heading on the **Sales** screen and select the desired field from the selection box.

6.6.3.14.4 Dis and Tax

Selecting the **Dis** checkbox causes the program to include a line item in calculating a percentage **Discount**.

Selecting the **Tax** checkbox causes the program to include this line item in calculating sales or VAT tax. By default, the tax checkbox(es) reflect the settings entered using the **Products** option on the **Categories** menu. Changing taxability settings on the **Edit Sales** screen *affects only the current sale*. To change the *default taxability* setting for any of your products, use the **Products** option on the **Categories** menu.

6.6.3.14.5 Del

The **Del** checkbox at the end of each line item on the **Sales** screen allows you to indicate whether that product has been delivered to your customer or is backordered. Checking the box indicates that your customer has received the item(s). Unchecking the box indicates that your customer has not yet received the product(s).

*Whether or not the **Del** checkbox is checked all line items will still be withdrawn from the program's inventory if you have the full-inventory edition of the program. The **Del** checkbox is for reporting purposes only and has no impact on the program's inventory count.*

All products which have not yet been delivered can be found by previewing or printing a **Sales History** report on the **Reports** screen and checking the filter box that reads " Show not delivered or received only". To change the **Del** status of an individual line item simply edit the sale containing that item.

An easy way to quickly locate all of your invoices that have one or more undelivered products is by checking the box that reads "Highlight invoices with items that have not been delivered" in the main **Sales** window. If all of the items for a particular invoice have now been delivered you can mark the

invoice as delivered by selecting it and then clicking on the **Mark selected records as delivered** in the main **Sales** screen.

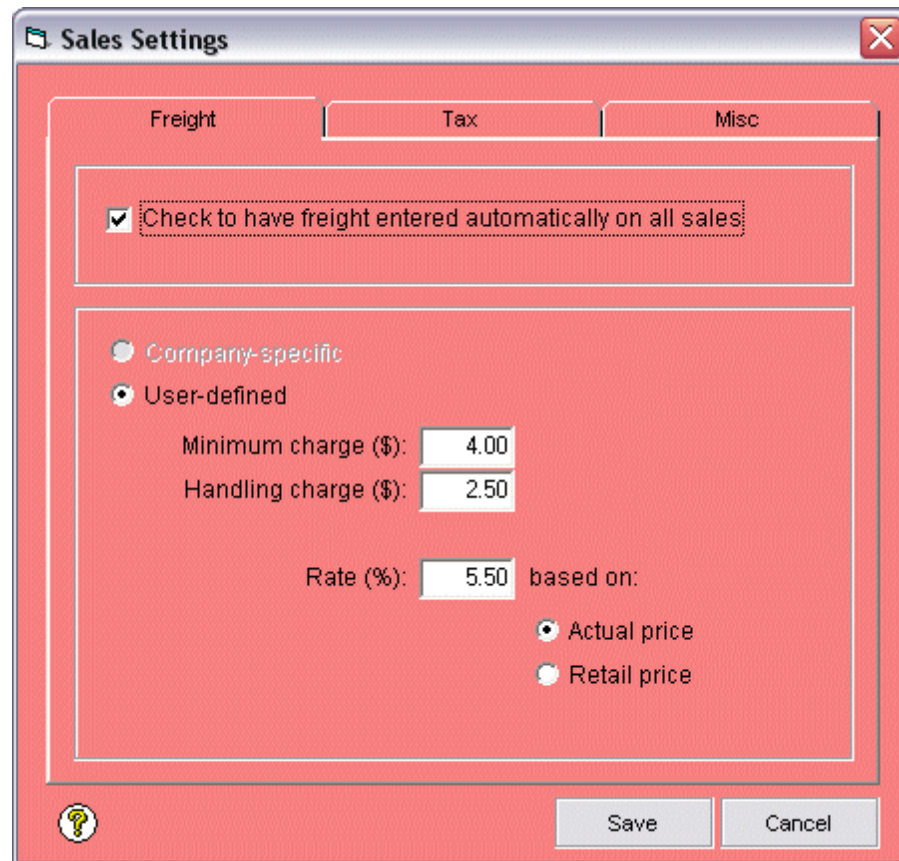
6.6.3.15 Setting Freight Rates

Purchases

There is typically no need to set freight rates in the program for product purchases. *The freight charge on product purchases should generally be copied directly from your company's invoice, making freight settings for purchases unnecessary.*

Sales

Freight rates for product sales are entered using the **Settings** buttons on the **Edit Sales** screen. This window can also be accessed via the **Setup Wizard** option on the **Help** menu and by clicking on the **Freight** label on the **Edit Sales** screen.



The image shows a screenshot of the "Sales Settings" dialog box. It has a title bar with a folder icon and the text "Sales Settings". There are three tabs: "Freight", "Tax", and "Misc". The "Freight" tab is selected. Inside the "Freight" tab, there is a checkbox labeled "Check to have freight entered automatically on all sales" which is checked. Below this, there are two radio buttons: "Company-specific" (unselected) and "User-defined" (selected). Under "User-defined", there are three input fields: "Minimum charge (\$)" with the value "4.00", "Handling charge (\$)" with the value "2.50", and "Rate (%)" with the value "5.50". To the right of the "Rate (%)" field is the text "based on:". Below this text are two radio buttons: "Actual price" (selected) and "Retail price" (unselected). At the bottom left of the dialog is a help icon (a question mark inside a circle). At the bottom right are two buttons: "Save" and "Cancel".

If you would like the program to calculate and enter freight for you on the **Sales** screen, check the checkbox at the top of the **Sale Settings** window. In general, it is usually easier to *enter freight on product purchases manually*, while allowing the program to calculate and enter the freight for you on product sales.

Company-specific: In some custom editions of the program, the **Company-specific** freight

calculation option will be enabled. Checking this box instructs the program to calculate freight charges using the method your company employs to determine freight charges. **Company-specific** freight calculations are handled automatically by the program, hence none of the **User-defined** settings will have any impact on freight calculations when this option is selected.

User-defined: When the **User-defined** freight calculation option is selected, the amount of freight automatically entered on product sales is calculated as follows. First, the program multiplies the freight rate, if any, times the total cost, price or weight of the product(s) being purchased or sold. Second, it compares this result with the minimum / fixed charge, selects whichever value is higher, and adds to it any handling charges. If you don't specify a minimum / fixed charge, the freight calculated will always be the freight rate times the total product cost, price or weight, plus handling. If you don't specify a freight rate, the freight calculated will always be the fixed / minimum charge plus handling.

6.6.3.16 Setting Tax Rates

Purchases

There is typically no need to set tax rates in the program for product purchases. *The tax charge (s) on product purchases should generally be copied directly from your company's invoice, making tax settings for purchases unnecessary (see Step 3 below).*

Sales

Tax rates for sales are entered using the **Settings** buttons on the **Edit Sales** screen. This window can also be accessed via the **Setup Wizard** option on the **Help** menu and by clicking on the **Tax** label on the **Edit Sales** screen.

To configure your tax settings using the **Tax** tab in the **Sale Settings** window, just do the following:

1. Check the first checkbox if your state, province or country charges sales or VAT tax on any of the products you sell. This setting affects both **Purchases** and **Sales**. Checking or un-checking this box in either the **Purchase Settings** or **Sale Settings** window will cause it to have the same setting in the other window. If none of your products are subject to sales or VAT tax, leave the first checkbox un-checked and click on **Save**. You are finished configuring your tax settings.
2. Check the second checkbox if your state, province or country has two different sales or VAT tax rates for any of the products you sell. This setting affects both **Purchases** and **Sales**. Checking or un-checking this box in the **Purchase Settings** or **Sale Settings** window will cause it to have the same setting in the other window.
3. Check the third checkbox if you would like the program to calculate and enter tax for you on the **Purchases** or **Sales** screen. In general, it is usually easier to *enter tax on product purchases manually*, while allowing the program to calculate and enter the tax for you on product sales.
4. Enter the rate at which some or all of your products are taxed in the **Tax Rate 1** box. The name used to identify this tax rate can be changed by clicking on the label and entering a new name.
5. Select the option describing how this tax rate is applied using the option buttons immediately below the tax rate box. The **Actual Cost** or **Actual Price** and **Actual Cost + Frt** or **Actual Price + Frt** options use the net price of the products *after* any discount is applied in determining the taxable product total. **Business Items** entered on the **Purchases** or **Sales** screen are always assumed to be taxable.

6. Repeat Steps 4 and 5 for your second tax rate if applicable.
7. If you have selected one of the tax options that include tax on freight you may select the option to **Only tax freight allocated to taxable items** if this is how your state or province charges tax. If this option is not selected, freight will always be fully taxed whether or not a PO or Invoice includes other taxable items.
8. Click on **Save** to save your settings and close the window.
9. Click on the **Product** option on the **Categories** menu and set the default taxability for each individual product as appropriate.

6.6.3.17 Payment History

If the entire sale is being paid for with a single payment, selecting the appropriate **Method** of payment on the **Edit Sales** screen is all you need to do. Selecting the **Method** of payment will automatically retrieve any additional information that is needed to create the default payment record, including the customer's credit card information if required.

If more than one payment will be made on a sale, click on the ellipsis (...) button to the right of the **Balance Due** box on the **Edit Sales** screen (Standard and Professional only). This will display the **Payment History** window allowing you to track up to ten separate payments for each sale.

The screenshot shows the 'Payment History' window with a table of payments and summary fields at the bottom.

Date	Amount	Method	Check / Apprvl. #	Credit Card #	Exp.	Payor
2/5/06 ...	100.00	Check	298			Sarah Jantzen
2/8/06	64.84	Check	300			Sarah Jantzen

Summary fields at the bottom left:

Total: 164.84
Balance: 0.00

Buttons at the bottom right: Save, Cancel

If the total amount of the payments entered is less than the **Total** amount of the sale, the invoice will show a positive **Balance Due**. If the total amount of the payments is greater than the **Total** amount of the sale, as in the case of an overpayment, the invoice will show a negative **Balance Due**. Use the **Balance Due** report on the **Reports** screen (or the **Invoices** report with the "Show Balance Dues only" option selected to quickly find who owes you money and how much they owe you.

Payment information entered in the **Payment History** window (or the default payment record created by selecting the appropriate **Method** of payment) can be uploaded to ProPay for automated credit card processing. Payments that have been successfully uploaded and processed will be shown with a blue-green (teal) background in the **Payment History** window indicating that they are locked and can no longer be modified.

6.6.3.18 Receivables

Customers who have a **Balance Due** can be located several ways. One way is to click on the

Balance column heading on the **Sales** screen to sort the list by the amounts in that column. A second way is to preview or print a **Balance Dues** report or **Invoices** report on the **Reports** screen, while checking the "Show Balance Dues only" checkbox in the report filtering window. Finally, you can use the **Filter** button in the **Contacts** screen and select the **Sales** filter option that reads "Select only those contacts who have a balance due".

You can also have the program notify you any time you select a customer who has an outstanding balance using the "Notify if customer has a balance due" option (**Settings** button on the **Edit Sales** screen).

6.6.4 Editing Sales

The 'Edit Sales' window displays a table of items with columns: Item #, Description, Qty, Unit Price..., Extd. Price, Note (optional), Dis, Tax, Tax, Del. The table contains two items: 101 Astoria Body Wrap and 102 Astoria Facial Creme. Below the table, there are summary fields: Date (3/15/05), Total Qty (4.0), SUBTOTAL (76.00), Invoice # (1012), Customer (Nicole, Kendall), Event (100005 Jamie's party), Method / Code (Credit), and various checkboxes (Inside order, Potential Host, Booked Event, Potential Recruit, Host order, Presider, Auto print). Summary fields also include Supplies, Discount, Freight (6.68), GST / PST (6.27), Credit, GR. TOTAL (88.95), and Balance Due (0.00). A customer information box shows Customer #100030, 268 Ruby Avenue, San Carlos CA, 94070. At the bottom are buttons: Settings, Convert, Bundles, New, Save, and Cancel.

Item #	Description	Qty	Unit Price...	Extd. Price	Note (optional)	Dis	Tax	Tax	Del
1	101 Astoria Body Wrap	2.0	19.00	38.00		☐	☒	☐	☒
2	102 Astoria Facial Creme	2.0	19.00	38.00		☐	☒	☐	☒
3						☐	☐	☐	☐
4						☐	☐	☐	☐
5						☐	☐	☐	☐
6						☐	☐	☐	☐
7						☐	☐	☐	☐
8						☐	☐	☐	☐
9						☐	☐	☐	☐
10						☐	☐	☐	☐

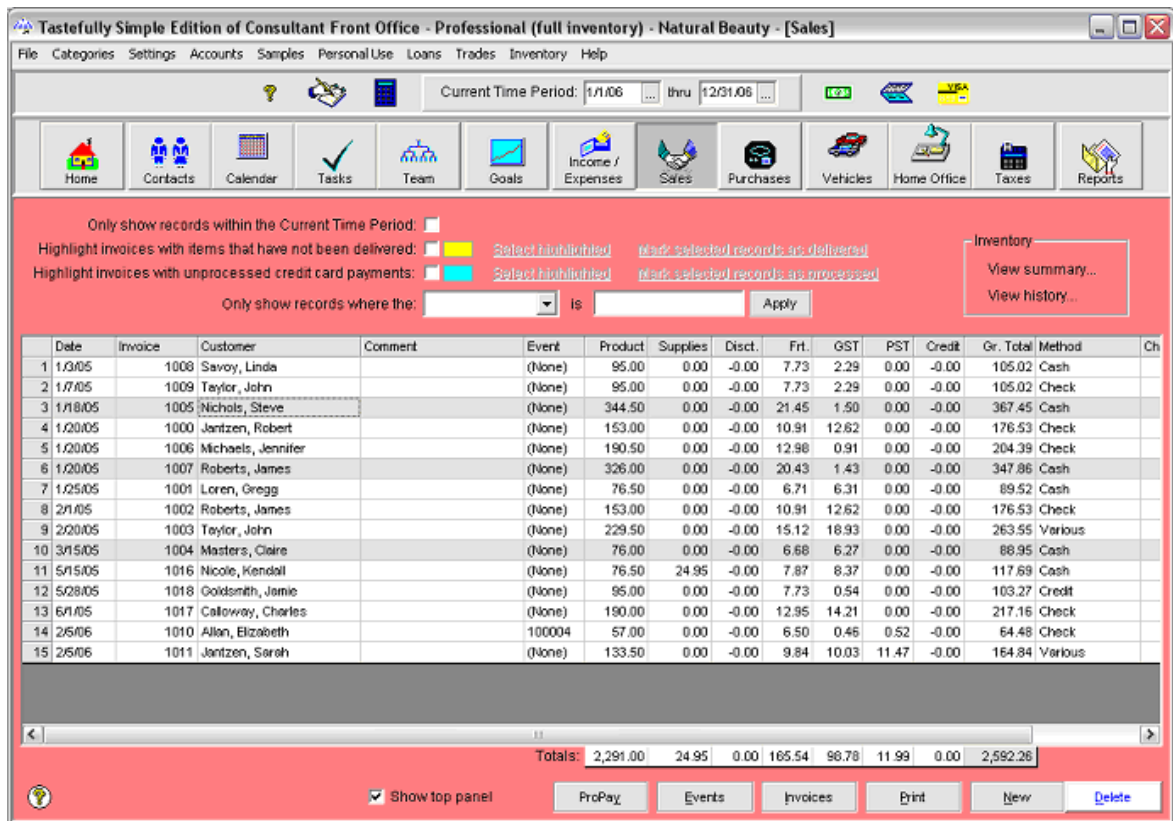
Date: 3/15/05 Total Qty: 4.0 SUBTOTAL: 76.00
 Invoice #: 1012 ☒ Auto number Supplies:
 Customer: Nicole, Kendall Discount: %
 Comment: Freight: 6.68 (\$4.00 | \$2.50 | 5.50%)
 Event: 100005 Jamie's party GST / PST: 6.27 (7.000% | 8.000%)
 Method / Code: Credit Credit:
☒ Inside order ☐ Host order
☒ Potential Host ☐ Presider
☐ Booked Event ☐ Auto print
☒ Potential Recruit
 GR. TOTAL: 88.95 Balance Due: 0.00
 Customer #100030
 268 Ruby Avenue
 San Carlos CA, 94070

Settings Convert Bundles New Save Cancel

To edit a previously recorded **Sales** entry do the following:

1. Click on the **Sales** button on the main toolbar to go to the **Sales** screen.
2. Double click on a row in the display to open the **Edit Sales** window.
3. Make the desired changes.
4. Click on **Save** to save your changes.

6.6.5 Deleting Sales



To delete a previously saved **Sales** entry do the following:

1. Click on the **Sales** button on the main toolbar to go to the **Sales** screen.
2. Click on the row to be deleted. To delete multiple rows hold down your CTRL key while clicking.
3. Click on **Delete** to delete the sale(s).

In the full-inventory edition of the program, deleting a sale also restores the products to inventory and makes all necessary adjustments to your Cost of Goods Sold.

6.6.6 Invoices

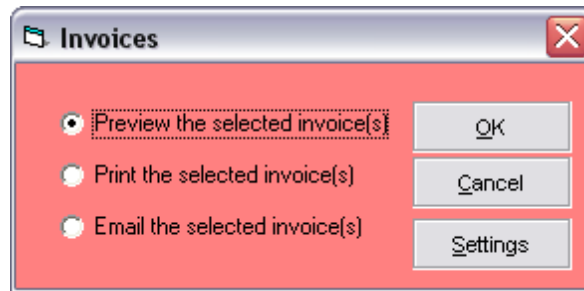
Invoices

Consultant Front Office automatically creates an invoice every time you enter a sale. To customize the appearance of invoices click on the **Invoices** button on the **Sales** screen, then click on **Settings**.

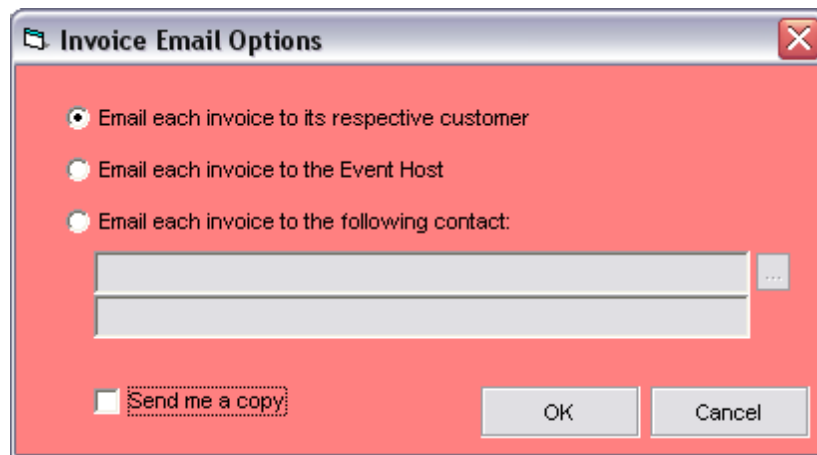
To preview, print or email a copy of an invoice do the following:

1. Select the invoice(s) on the main **Sales** screen using your mouse. To select multiple rows hold down your CTRL key while clicking.
2. Click on the **Invoices** button on the **Sales** screen to display the **Invoices** window.
3. Click on the **Settings** button to customize the appearance of all of your invoices (see below).

4. Select one of the displayed options and click **OK**.



If you select the option that reads "Email the selected invoice(s), then the **Invoice Email Options** window will be displayed, allowing you to choose who you would the invoice emailed to.

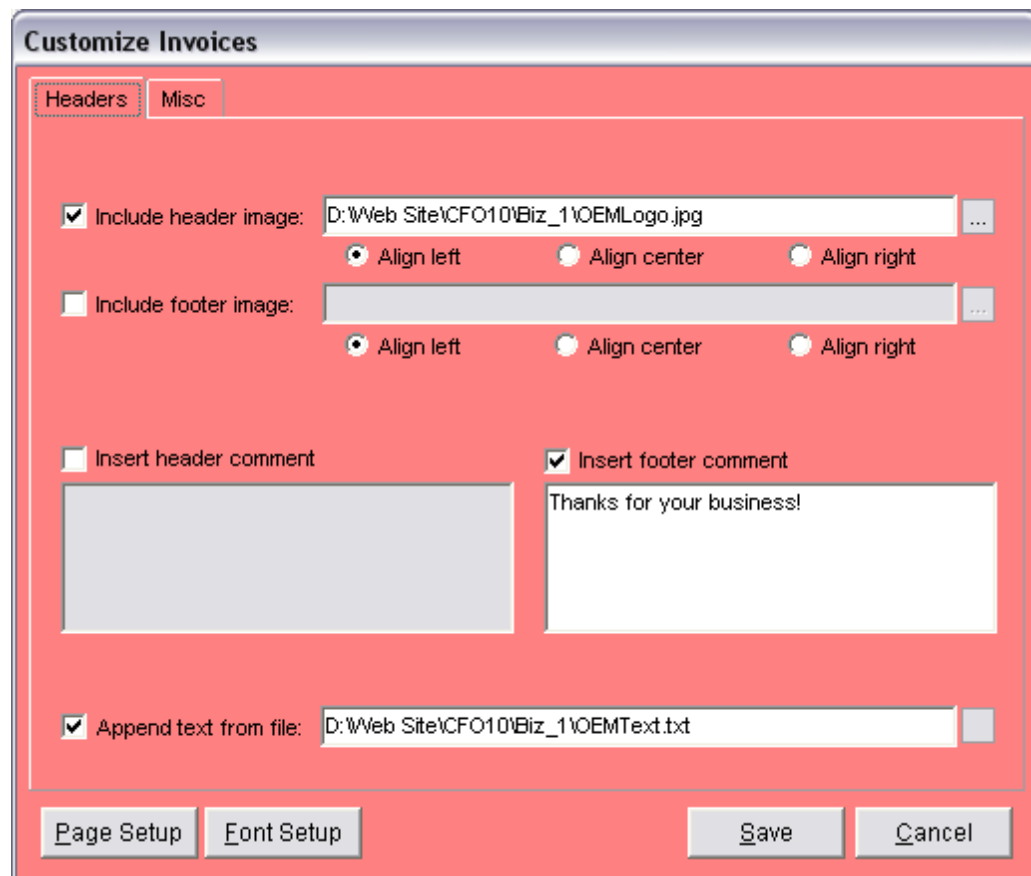


Modifying Invoices

Invoices can be modified or deleted, by editing the underlying sale transaction.

Customizing Invoices and Purchase Orders

Clicking on the **Settings** button in the **Invoices** window allows you to specify what information is included in these documents and to add text and images to them if you choose.



The image shows a 'Customize Invoices' dialog box with two tabs: 'Headers' and 'Misc'. The 'Headers' tab is selected. It contains several options for customizing invoice headers and footers. The 'Include header image' checkbox is checked, with a text field showing the path 'D:\Web Site\CFO10\Biz_1\OEMLogo.jpg' and an ellipsis button to the right. Below this are three radio buttons for alignment: 'Align left' (selected), 'Align center', and 'Align right'. The 'Include footer image' checkbox is unchecked, with an empty text field and an ellipsis button to the right. Below this are three radio buttons for alignment: 'Align left' (selected), 'Align center', and 'Align right'. The 'Insert header comment' checkbox is unchecked, with an empty text area below it. The 'Insert footer comment' checkbox is checked, with a text area containing the text 'Thanks for your business!'. At the bottom, the 'Append text from file' checkbox is checked, with a text field showing the path 'D:\Web Site\CFO10\Biz_1\OEMText.txt' and a small square button to the right. At the bottom of the dialog are four buttons: 'Page Setup', 'Font Setup', 'Save', and 'Cancel'.

Customize Invoices

Headers **Misc**

☒ Include header image: D:\Web Site\CFO10\Biz_1\OEMLogo.jpg ...

☐ Align left ☐ Align center ☐ Align right

☐ Include footer image: ...

☐ Align left ☐ Align center ☐ Align right

☐ Insert header comment

☒ Insert footer comment

Thanks for your business!

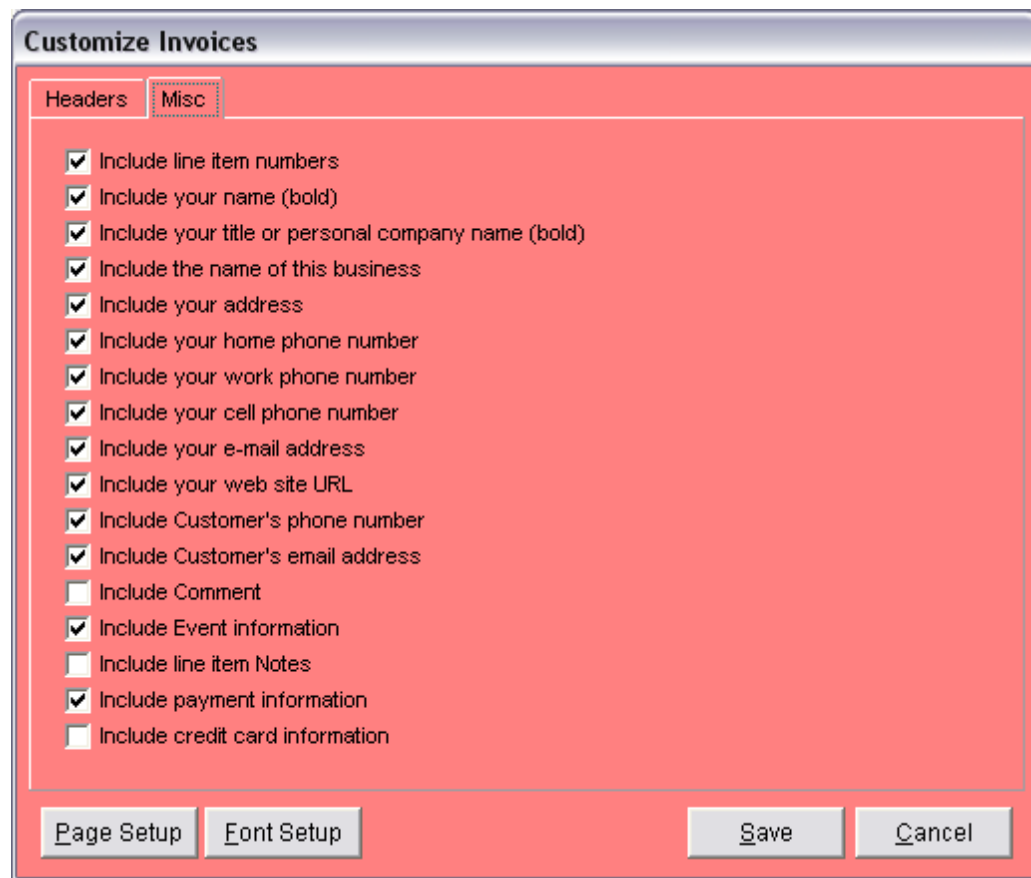
☒ Append text from file: D:\Web Site\CFO10\Biz_1\OEMText.txt

Page Setup Font Setup Save Cancel

To add a header or footer image to your invoices check the appropriate checkbox, then click on the ellipsis (...) button to the far right of the checkbox and select the image file you would like to include. Image files with any of the following file extensions can be added to your invoices:

- bmp
- gif
- jpg
- wmf

The program will not allow you to close the **Customize Invoice** window if you have selected either of these "image" options and not entered a valid image path.



To append text from a file to the end of your invoice check the **Append text from file** option on the **Misc** tab of the **Customize Invoices** window, then click on the ellipsis (...) button to the far right of the checkbox and select the text file you would like to append.

Uploading Payments to ProPay™

Your customers credit card payments can be uploaded to **ProPay** for credit card processing using the [ProPay](#) button on the **Sales** screen..

Printing Invoices Automatically

Invoices can be printed automatically when a sale is saved by checking the **Auto Print** checkbox on the **Edit Sales** screen. If you would like more than one copy of an invoice printed using the **Auto Print** function, click on the **Settings** button on the **Edit Sales** screen and set the "Auto print quantity" on the **Misc** tab to the desired number of copies.

6.6.7 Discountability and Taxability

Selecting the **Dis** checkbox causes the program to include a line item in calculating a percentage **Discount**.

Selecting the **Tax** checkbox causes the program to include this line item in calculating sales or VAT

tax. By default, the tax checkbox(es) reflect the settings entered using the **Products** option on the **Categories** menu. Changing taxability settings on the **Edit Sales** screen *affects only the current sale*. To change the *default taxability* setting for any of your products, use the **Products** option on the **Categories** menu.

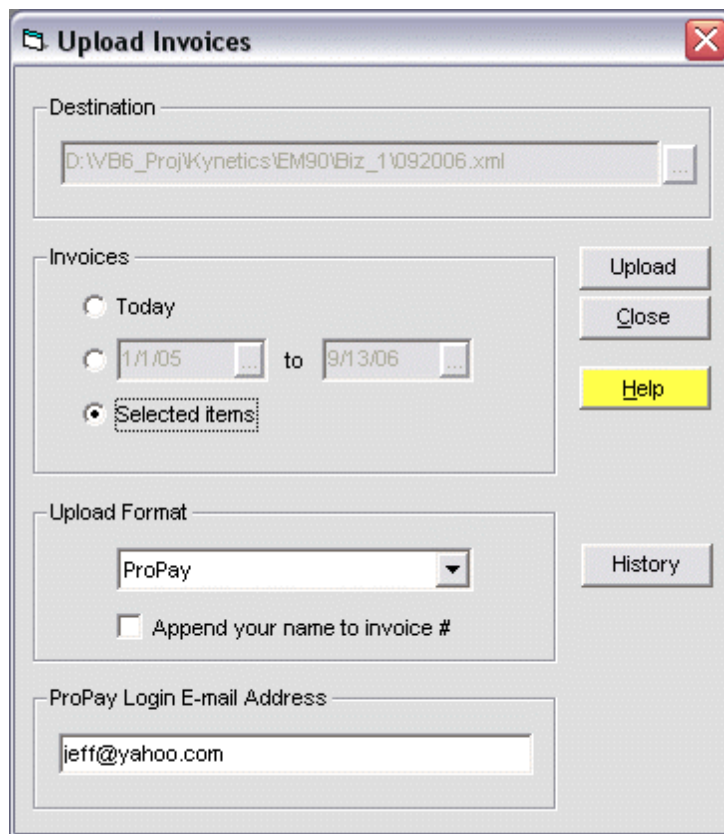
6.6.8 Uploading Payments To ProPay

The program is capable of tracking the status of credit card payments from your customers and of uploading those payments to the ProPay merchant account system for processing.

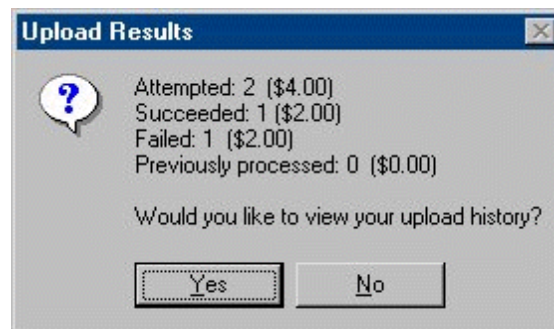
To use the program's credit card payment status tracking and uploading capabilities, just do the following:

1. Ensure that customer credit card information is accurately entered on the **Contacts** screen or using the mini-contacts screen that's available when you're entering a sale. **This must be done prior to saving a customer's sale for the credit card information to be retrieved automatically.** To associate a credit card number with a sale that's already been saved you will need to:
 - 1.a. Edit the sale by double clicking on that entry in the main **Sales** screen.
 - 1.b. Click on the ellipsis (...) button next to the **Balance Due** box to open the **Payment History** window.
 - 1.c. Right click on the first payment record and left click on **Update credit card**.
 - 1.d. Close the **Payment History** window and resave the sale.
2. Check the box on the main **Sales** screen that reads "Highlight invoices with unprocessed credit card payments". This will cause the program to highlight the **Method** of payment field in each row where an unprocessed credit card payment was found. (To change the highlighting color click on the button next to this checkbox that displays the current color.)
3. Click on the link next to this checkbox that reads "Select highlighted" to have the program select all of the highlighted rows.
4. Click on the **ProPay** button to open the **Upload Invoices** window.
5. Make sure that the "Selected items" option is selected.
6. Make sure the "ProPay" is selected in the **Upload Format** section. If you would like to append your name to the invoice number field in the upload file, put a check in the box that reads "Append my name to invoice #"". (Appending your name to the invoice number field causes your name to be printed next to the charge amount on your customer's credit card statement for identification purposes).
7. Enter the email address you use to log into ProPay in the space provided.
8. Click on **Upload**.
9. Click **OK** when asked to confirm that you would like to charge your customers' credit card(s).

Invoices can also be selected by date using the other selection options in the **invoices** section of the **Upload Invoices** window.



Once uploading is complete, an **Upload Results** box will be displayed containing the following information:



Attempted	the number and total value of payments uploaded to ProPay for processing.
Succeeded	the number and total value of payments successfully processed by ProPay.
Failed	the number and total value of payments that were not successfully processed.

Previously .. the number and total value of payments that were not uploaded because they have already been successfully processed.

6.6.9 Receivables

Customers who have a **Balance Due** can be located several ways. One way is to click on the **Balance** column heading on the **Sales** screen to sort the list by the amounts in that column. A second way is to preview or print a **Balance Dues** report or **Invoices** report on the **Reports** screen, while checking the "Show Balance Dues only" checkbox in the report filtering window. Finally, you can use the **Filter** button in the **Contacts** screen and select the **Sales** filter option that reads "Select only those contacts who have a balance due".

You can also have the program notify you any time you select a customer who has an outstanding balance using the "Notify if customer has a balance due" option (**Settings** button on the **Edit Sales** screen).

6.7 Purchases

6.7.1 Overview

The **Purchases** screen is used to enter all expenses resulting directly from the purchase of products for resale.

The **Purchases** screen shows a listing of all of the purchase orders (POs) you have entered into the program, unless some of those POs are hidden due to the "Only show records within the Current Time Period" checkbox at the top of the screen being checked.

View current entries only View entries with unsaved changes only Filter the display by P.O., vendor, event, total, method of payment or check #

Consultant Front Office - Professional - Natural Beauty - [Purchases]

File Categories Settings Accounts Samples Personal Use Loans Help

Current Time Period: 1/1/06 thru 12/31/06

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Only show records within the Current Time Period: ☒
 Only show records that have not been saved: ☒
 Only show records where the: is Apply

	Date	P.O.	Vendor	Comment	Event	Product	Supplies	Disc.	Frt.	GST	PST	Credit	Gr. Total	Method
1	1/15/05	890987	Inc., BelleJour		(None)	213.50	0.00	0.00	14.24	25.20	0.00	0.00	252.94	Credit
2	2/2/05	101987	Inc., BelleJour		(None)	250.00	0.00	0.00	16.25	0.00	0.00	0.00	266.25	Credit
3	2/15/05	921098	Inc., BelleJour		(None)	310.00	0.00	0.00	19.55	36.26	0.00	0.00	365.81	Credit
4	3/15/05	909009	Inc., BelleJour		(None)	163.50	0.00	0.00	11.49	18.93	0.00	0.00	193.92	Various
5	4/15/05	100126	Inc., BelleJour		(None)	272.50	0.00	0.00	17.49	31.56	0.00	0.00	321.55	Credit
6	5/31/05	800027	Inc., BelleJour		(None)	176.00	0.00	0.00	12.18	20.50	0.00	0.00	208.68	Credit
7	6/15/05	100018	Inc., BelleJour		(None)	272.50	0.00	0.00	17.49	31.56	0.00	0.00	321.55	Credit
8	2/5/06	10978987	Inc., BelleJour		(None)	492.50	0.00	-197.00	18.75	57.21	57.21	0.00	428.67	Various

Totals: 2,150.50 0.00 -197.00 127.44 221.22 57.21 0.00 2,359.37

☒ Show top panel Events Print Save New Delete

Full-screen option Add, edit or delete an event (party, fundraiser etc.) Add a new record to the display Delete all selected entries

6.7.2 Entering Purchases

6.7.2.1 Overview

Consultant Front Office - Professional - Natural Beauty - [Purchases]

File Categories Settings Accounts Samples Personal Use Loans Trades Help

Current Time Period: 1/1/09 thru 12/31/09

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Only show records within the Current Time Period: ☐

Only show records that have not been saved: ☒

Only show records where the: is Apply

Date	P.O.	Vendor	Comment	Event	Product	Supplies	Disc't	Frt	Tax 1	Credit	Grand Total	Method	Check	Balance
1 6/5/11	1095478	Inc., BelleJour		100005	432.55	10.45	-121.45	14.95	21.75	0.00	358.25	Credit		0.00

Totals: 432.55 10.45 -121.45 14.95 21.75 0.00 358.25

☒ Show top panel Events Print Save New Delete

Product purchases are entered directly onto the **Purchases** screen. Here are the basic instructions for entering a purchase. The links at the end of some of these steps contain more detailed information regarding that specific entry.

1. Click on the **Purchases** button on the main program toolbar to go to the **Purchases** screen.
2. Click on the **New** button on the **Purchases** screen to add a new row to the display.
3. **Date:** Enter the date you actually bought the products either by typing or using the pop-up calendar. Dates can also be adjusted using the up and down arrows and **PgUp** and **PgDn** keys.
4. **P.O. #:** Enter the invoice or order number found on the paperwork you received from your company.
5. **Vendor:** Select the vendor's name from your list of contacts ([Vendor](#)).
6. **Comment:** Enter a note regarding the purchase.
7. **Event:** Select the **Event** this purchase is associated with (optional - [Event](#)),
8. **Product** Enter the cost for resellable products as shown on the paperwork received from your company.
9. **Supplies** Enter the cost for business supplies as shown on the paperwork received from your company.
10. **Disc't** Enter the amount of any discount that was applied to this order.
11. **Frt** Enter the freight or shipping and handling charge as shown on the paperwork received from your company.
12. **Tax 1** Enter the amount of sales or VAT tax (first tax rate) as shown on the paperwork received from your company.
13. **Tax 2** Enter the amount of sales or VAT tax (second tax rate) as shown on the paperwork received from your company.
14. **Credit** Enter the amount of any credit that was applied to this order.
15. **Method:** Select the method of payment or leave blank if unpaid (optional - ([Pay Method](#))).
16. **Check #:** Enter the check number in the **Check #** box if applicable.
17. Click on **Save** to save your entries.

6.7.2.2 Vendor

Select the name of the person or business you are purchasing the product(s) from. All of your currently filtered contact listings are available for selection in the **Vendor** box or using the first ellipsis (...) button to the right of the box. To add a new vendor to the list, or to enter a vendor name for this purchase order only, click on the ellipsis button, then click on the **New** button in the **Contacts** window. This will display the **New Contact** window, allowing you to enter a name, and select whether this name should be added to your contact database (**Add Contact**) or saved only in association with this P.O. (**P.O. Only**).

6.7.2.3 Event

Select the **Event** (if any) that this purchase is associated with. If this purchase occurred in connection with a party, trade show or other type of **Event**, and you would like to be able to get reports based on this **Event**, select the corresponding **Event** number from the available list. The list of available events can be edited directly from the **Purchases** screen by clicking on the **Events** button at the bottom of the screen. This button displays the **Events** window, showing a list of your previously defined events.

6.7.2.4 Payment Method

Select the method of payment used to pay for the purchase being recorded. **Check**, **Debit** and

Electronic payments are automatically deducted from your checking account. **Credit** payments are automatically deducted from your credit card account.

Use the "(other)" payment options to indicate that an expense was not paid from one of your primary business accounts. While this does not change your business records, it prevents the entry from being "rolled up" into your **Cash, Checking** or **Credit** account registers.

If more than one payment method was used on a purchase, click on the ellipsis (...) button in the **Balance Due** field for the purchase being entered or edited, to enter up to 10 individual payments for each purchase.

6.7.3 Editing Purchases

Date	P.O.	Vendor	Comment	Event	Product	Supplies	Disc.	Frt.	GST	PST	Credit	Gr. Total	Method
1/1/05	890987	Inc., BelleJour		(None)	213.50	0.00	-0.00	14.24	25.20	0.00	-0.00	252.94	Credit
2/2/05	101987	Inc., BelleJour		(None)	250.00	0.00	-0.00	16.25	0.00	0.00	-0.00	266.25	Credit
3/2/05	921098	Inc., BelleJour		(None)	310.00	0.00	-0.00	19.55	36.26	0.00	-0.00	365.81	Credit
4/3/05	909009	Inc., BelleJour		(None)	163.50	0.00	-0.00	11.49	18.93	0.00	-0.00	193.92	Various
5/4/05	100126	Inc., BelleJour		(None)	272.50	0.00	-0.00	17.49	31.56	0.00	-0.00	321.55	Credit
6/5/05	800027	Inc., BelleJour		(None)	176.00	0.00	-0.00	12.18	20.50	0.00	-0.00	208.68	Credit
7/6/05	100018	Inc., BelleJour		(None)	272.50	0.00	-0.00	17.49	31.56	0.00	-0.00	321.55	Credit
8/2/05	10978987	Inc., BelleJour		(None)	492.50	0.00	-197.00	18.75	57.21	57.21	-0.00	428.67	Various
Totals:					2,150.50	0.00	-197.00	127.44	221.22	57.21	0.00	2,359.37	

To edit a previously recorded purchase entry, just do the following:

1. Double click on the entry to be changed.
2. Make the desired change.
3. Repeat Steps 1 – 2 for additional changes.
4. Click on **Save** to save all of your changes.

6.7.4 Deleting Purchases

Only show records within the Current Time Period: ☐ Highlight POs with items that have not been received: ☐ Select highlighted Mark selected records as received

Only show records where the: is Apply

	Date	P.O.	Vendor	Comment	Event	Product	Supplies	Disc.	Frit.	GST	PST	Credit	Gr. Total	Method	Ch
1	1/15/05	890987	Inc., BelleJour		(None)	213.50	0.00	-0.00	14.24	25.20	0.00	-0.00	252.94	Credit	
2	2/2/05	101987	Inc., BelleJour		(None)	250.00	0.00	-0.00	16.25	0.00	0.00	-0.00	266.25	Credit	
3	2/15/05	921098	Inc., BelleJour		(None)	310.00	0.00	-0.00	19.55	36.26	0.00	-0.00	365.81	Credit	
4	3/15/05	909009	Inc., BelleJour		(None)	163.50	0.00	-0.00	11.49	18.93	0.00	-0.00	193.92	Various	
5	4/15/05	100126	Inc., BelleJour		(None)	272.50	0.00	-0.00	17.49	31.56	0.00	-0.00	321.55	Credit	
6	5/31/05	800027	Inc., BelleJour		(None)	176.00	0.00	-0.00	12.18	20.50	0.00	-0.00	208.68	Credit	
7	6/15/05	100018	Inc., BelleJour		(None)	272.50	0.00	-0.00	17.49	31.56	0.00	-0.00	321.55	Credit	
8	2/5/06	10978987	Inc., BelleJour		(None)	492.50	0.00	-197.00	18.75	57.21	57.21	-0.00	428.67	Various	
Totals:						2,150.50	0.00	-197.00	127.44	221.22	57.21	0.00	2,359.37		

☒ Show top panel

Events POs Print New Delete

To delete a previously recorded **Purchase** entry, do the following:

1. Click on the **Purchases** button on the main toolbar to go to the **Purchases** screen.
2. Click on the row to be deleted. To delete multiple rows hold down your CTRL key while clicking.
3. Click on **Delete** to delete the purchase(s).

6.8 Personal Use and Samples

6.8.1 Personal Use

Personal Use - Withdrawal

Date: 7/11/08 ...

Event: (None) ...

	Group	Item #	Description	Qty	Note
1	Skin Care	101	Astoria Body Wrap	1.0	
2	Supplements	105	Women's Daily Boost	1.0	
3					
4					
5					
6					

Save Close

Resellable products used for your own personal use can be tracked using the [Withdrawals](#) option on the **Personal Use** menu. Tracking personal use products in this manner makes it easier to estimate the total value of personally used products for entry on the **Taxes** screen at the end of each year.

6.8.2 Samples

Promotional Samples - Withdrawal

Date: 7/11/08 ...

Event: 100006 Jennifer's Party ...

	Group	Item #	Description	Qty	Purpose (required)
1	Skin Care	102	Astoria Facial Creme	1.0	
2	Supplements	103	Better Health Day Pack	1.0	
3					
4					
5					
6					

Save Close

Resellable products used as promotional samples can be tracked using the [Withdrawals](#) option on the **Samples** menu. This capability is provided for your convenience and is not a required entry.

6.9 Loans and Trades

6.9.1 Loaned Products

Loaned Products

Date: 3/7/08

Contact: Jantzen, Sarah

Event: (None)

Followup Task: 4/16/08 Product loan follow up

	Group	Item #	Description	Qty	Note
1	Skin Care	101	Astoria Body Wrap	1.0	
2	Supplements	105	Women's Daily Boost	1.0	
3					
4					
5					

Save Close

Resellable products that you loan to a customer or to another distributor can be tracked using the [Loan](#) option on the **Loans** menu. This capability is provided for your convenience and is not a required entry.

6.9.2 Borrowed Products

Borrowed Products

Date: 7/20/08 ...

Contact: Masters, Claire ...

Event: (None) ...

Followup Task: ... **New** **Edit** **Del**

	Item #	Description	Qty	Note
1	102	Astoria Facial Creme	1.0	
2				
3				
4				
5				

Save **Close**

Resellable products that you borrow from another distributor can be tracked using the [Borrow](#) option on the **Loans** menu. This capability is provided for your convenience and is not a required entry.

6.9.3 Product Trades

Product Trades

Date: 7/26/08

Contact: Mosstet, Valorie

Event: (None)

Note:

Product(s) Given

	Item #	Description	Qty	Unit Retail	Extd. Retail
1	101	Astoria Body Wrap	1.0	\$19.00	\$19.00
2					
3					
4					
5					
			1.0		\$19.00

Product(s) Received

	Item #	Description	Qty	Unit Retail	Extd. Retail
1	102	Astoria Facial Creme	1.0	\$19.00	\$19.00
2					
3					
4					
5					
			1.0		\$19.00

Buttons: Save, Close, Print, ?

Product trades can be tracked using the **Trades** menu at the top of the screen. This capability is provided for your convenience and is not a required entry.

6.10 Accounts

6.10.1 Cash Account

Your **Cash** account contains a listing of **Expense** and **Purchase** transactions where the selected pay method is "Cash". Your **Cash** account also contains a listing of **Income** and **Sale** transactions where the selected pay method is "Cash", if the **Preferences** option "Deposit Cash payments into Cash account" is selected at the time the transaction is saved.

Date	Invoice	Description	Amount	Balance	Status
1/20/99	1000		\$176.53	\$176.53	
1/25/99	1001		\$89.52	\$266.05	
2/1/99	1002		\$176.53	\$442.58	
2/20/99	1003		\$263.55	\$706.13	
3/15/99	1004		\$88.95	\$795.08	
7/28/99	1005		\$68.74	\$863.82	

Deposits to your **Cash** account are shown in black and withdrawals in red. Adjustments to your **Cash** account can be made using the **Adjust** button in the **Cash** account window. This button displays the **Adjust Cash** window allowing you to enter deposits or withdrawals that are not associated with an **Income**, **Expense**, **Sales** or **Purchase** transaction. The **Cash** account register can be sorted by clicking directly on any of the column headings. This sorted display can also be printed using the **Print** button in the **Cash** account window.

The account can be reconciled using the **Reconcile** button in the **Cash** account window. Individual records can also be marked as reconciled or as unreconciled, by right clicking on a row and then left clicking on the desired option. Please see [Reconciling an Account](#) for instructions on reconciling your **Cash** account.

6.10.2 Checking Account

Your **Checking** account contains a listing of **Expense** and **Purchase** transactions where the selected pay method is "Check", "Debit" or "Electronic". Although options exist to have **Income** and **Sales** transactions entered automatically into your **Checking** account, it is typically better to enter these deposits manually using the **Adjust** button in the **Checking** account window, so that the deposits exactly match those on your bank statement.

Date	Method	Check No.	Invoice	Description	Amount	Balance	Status
2/6/00	Check	101		*Office Expe	(\$25.00)	(\$25.00)	
1/1/06	Check	102		*Office Expe	(\$9.95)	(\$34.95)	C
1/5/06	Check	103		*Advertising	(\$14.95)	(\$49.90)	C
1/11/06	Check	104		*Supplies	(\$13.25)	(\$63.15)	C
1/23/06	Check	105		*Office Expe	(\$4.95)	(\$68.10)	C

Deposits to your **Checking** account are shown in black and withdrawals in red. Adjustments to your **Checking** account can be made using the **Adjust** button in the **Checking** account window. This button displays the **Adjust Checking** window allowing you to enter deposits or withdrawals that are not associated with an **Income**, **Expense**, **Sales** or **Purchase** transaction.

To establish your starting checking account balance in the program, just do this:

1. Reconcile any existing
2. Use the **Adjust Checking** window to enter a deposit or a withdrawal for the amount in your checking account on the day you begin using the software.

The **Checking** account register can be sorted by clicking directly on any of the column headings. This sorted display can also be printed using the **Print** button in the **Checking** account window.

The account can be reconciled using the **Reconcile** button in the **Checking** account window. Individual records can also be marked as reconciled or as unreconciled, by right clicking on a row and then left clicking on the desired option. Please see [Reconciling an Account](#) for instructions on reconciling your **Checking** account.

6.10.3 Credit Account

Your **Credit** account contains a listing of **Expense** and **Purchase** transactions where the selected pay method is **Credit**.

Credit

Only show records within the Current Time Period: ☐

Date	Invoice	Description	Amount	Balance	Status
1/30/00		Training Fees	(\$50.00)	(\$50.00)	
2/3/00		*Office Expe	(\$35.00)	(\$85.00)	
1/15/05	890987	Inc., BelleJou	(\$252.94)	(\$337.94)	
2/2/05	101987	Inc., BelleJou	(\$266.25)	(\$604.19)	
2/15/05	921098	Inc., BelleJou	(\$365.81)	(\$970.00)	
4/15/05	100126	Inc., BelleJou	(\$321.55)	(\$1,291.55)	
5/31/05	800027	Inc., BelleJou	(\$208.68)	(\$1,500.23)	
6/15/05	100018	Inc., BelleJou	(\$321.55)	(\$1,821.78)	
1/1/06		*Office Expe	(\$14.05)	(\$1,835.83)	

Search

By PO: ☐

By Description: ☐

By Amount: ☐

Find Next

Adjust

Reconcile

Print

Close

Deposits to your **Credit** account are shown in black and withdrawals in red. Adjustments to your **Credit** account can be made using the **Adjust** button in the **Credit** account window. This button displays the **Adjust Credit** window allowing you to enter deposits or withdrawals that are not associated with an **Expense** or **Purchase** transaction.

The **Credit** account register can be sorted by clicking directly on any of the column headings. This sorted display can also be printed using the **Print** button in the **Credit** account window.

The account can be reconciled using the **Reconcile** button in the **Credit** account window. Individual records can also be marked as reconciled or as unreconciled, by right clicking on a row and then left clicking on the desired option. Please see [Reconciling an Account](#) for instructions on reconciling your **Credit** account.

6.10.4 Reconciling an Account

To reconcile your Cash, Checking or Credit account, just do the following:

1. Open the account you wish to reconcile using the **Accounts** menu or the icons to the right of the **Current Time Period** at the top of the screen.
2. Click on the **Reconcile** button in the account window to display the **Reconcile** window.

Reconcile Checking

Balance Entry

Opening Balance: 87.96

Closing Balance: 49.81

Balance Reconciliation

Cleared Balance: 49.81

Closing Balance: 49.81

Difference: 0.00

Non-Business Adjustments

Interest: 7/11/08 ...

Service Charge: 7/11/08 ...

Clear	Date	Check #	Description	Amount
C	1/1/2006	102	*Office Expense	-9.95
C	1/5/2006	103	*Advertising	-14.95
C	1/11/2006	104	*Supplies	-13.25
	1/23/2006	105	*Office Expense	-4.95

Buttons: Finish Later, Cancel, Reconcile

Checkboxes: ☒ Deposits, ☒ Withdrawals

3. If you have previously reconciled this account, the **Opening Balance** should be automatically filled in with your previous **Closing Balance**. If this is your first time reconciling this account, leave the **Opening Balance** empty for the time being.
4. Enter the ending balance from your bank statement in the **Closing Balance** box.
5. The **Interest** and **Service Charge** boxes are provided for convenience and perform essentially the same function as entries made using the **Deposits /Withdrawals** button from the account window. The **Interest** and **Service charge** boxes are disabled when reconciling the **Cash** account.

IMPORTANT: Entries recorded using the **Interest** and **Service Charge** boxes only affect your account register and are not reflected in your business or tax records. To have these entries become part of your business records make the entries on the **Income** and **Expenses** screens instead of from the **Reconcile** window.

6. Check off the records you want to reconcile by clicking with your mouse in the **Clear** column next to the reconciled item. This will turn that record yellow and enter a "C" in the **Clear** column indicating that it has been cleared and will be reconciled when the **Reconcile** button is clicked. To limit the display to records entered during the **Current Time Period** right click on the grid display and then left click on the **Impose Current Time Period** option. To include records in the display that have already been reconciled, right click on the grid display and then left click on **Include reconciled records**. The display can also be limited to display only deposits, only withdrawals, or both types of transactions, using the checkboxes located just below the **Help** button.
7. If you want to save the changes you've made but are not yet ready to permanently reconcile the records, click on the **Finish Later** button to save your current status. To discard all of the changes made since the **Reconcile** window was opened click on **Cancel**.

8. When you're done checking off records, the **Cleared Balance** should match the **Closing Balance** leaving the entry in the **Difference** box at exactly zero, unless this is your first time reconciling this account. If this is your first time reconciling, then the value in the **Difference** box is likely to be negative. Enter the value found in the **Difference** box as a positive value in the **Opening Balance** box, so that the value in the **Difference** box becomes zero. You can then click on the **Reconcile** button to permanently reconcile the selected entries. If the **Difference** box shows a value other than zero, you can still click on the **Reconcile** button, but the program will warn you that an automatic adjustment entry will be required. The program will then make an adjustment to your account in the amount necessary to make the **Difference** between the **Closing Balance** and the **Cleared Balance** equal to zero.

6.11 Vehicles

6.11.1 Overview

All personal vehicles that have been used in your business Auto-complete mileage and expense log Option to view current entries only

IRS-approved method for deducting expenses

Consultant Front Office - Professional (full inventory) - Natural Beauty - [Vehicles]

File Categories Settings Accounts Samples Personal Use Loans Trades Inventory Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Vehicles

Make	Model	Year	Start Date	Deduction Method
Toyota	Sienna	2002	1/1/08	Standard mileage rate
Volkswagen	Jetta	2008	3/3/08	Actual expenses

Mileage ☐ Only show records within the Current Time Period

Date	Origin	Destination	Mileage	Business Purpose
1/18/08	Home	Cindy Morton	5	Drop off product
1/18/08	Home	Office Depot	7	Supplies
1/26/08	Home	Joanne Roberts	52	Party
2/6/08	Home	Office Depot	7	Supplies
2/23/08	Home	Post Office	7	Postage
3/22/08		San Rafael	96	Training
3/23/08	Home	Walmart	15	Party supplies
4/20/08	Home	Office Depot	7	Binder
5/4/08	Home	Walmart	15	Party supplies

Total Mileage for: 2002 Toyota Sienna New Delete

Year	Starting Odometer	Ending Odometer	Commute Miles	Rate per Mile (\$)	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2008	56981		570	.508	64	14	111	7	115								311
2009																	
2010																	
2011																	
2012																	
2013																	
2014																	
2015																	

☒ Recalculate totals automatically Recalc Save

Add or delete a vehicle Total mileage and expense recalculation options Add or delete a mileage or expense entry

The **Vehicles** screen is used to keep track of deductions resulting from the business use of one or more of your personal vehicles. It allows you to deduct expenses for as many vehicles as you choose using either the "Standard Mileage Rate" or the "Actual Expenses" method.

Vehicle information that you enter into the program is included in the program's **Income Tax** report and is summarized in the **Vehicle Summary** report, both of which are available on the **Taxes** screen

The screen has three areas as follows:

- **Vehicles:** This section of the screen contains a list of all of the vehicles you have ever used for a business purpose. It's perfectly fine to leave vehicles on this list even if you're no longer using them in your business, since the program's reports will ignore them unless they have mileage or expense entries that occur within the time period for which the report is generated.
- **Mileage (or Expenses):** This section of the screen contains a list of all of the mileage or expense entries you've made for the vehicle that's currently selected in the **Vehicles** section of the screen. The heading for this section of the screen will change between Mileage and Expenses depending on the Deduction Method of the currently-selected vehicle.
- **Total Mileage (Expenses) for:** This section of the screen contains summary information for the currently-selected vehicle. All of the monthly columns as well as the "Total" column in this display will be filled in automatically, either by having the "Recalculate totals automatically" checkbox checked or by clicking on the **Recalc** button from time to time after entering new records. The heading for this section of the screen will change between Mileage and Expenses depending on the Deduction Method of the currently-selected vehicle.

6.11.2 Entering Vehicle Information

Consultant Front Office - Professional - Natural Beauty - [Vehicles]

File Categories Settings Accounts Samples Personal Use Loans Trades Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Vehicles

Make	Model	Year	Start Date	Deduction Method
Volkswagen	Jetta	2008	3/3/08	Actual expenses
Toyota	Sienna	2002	1/1/08	Standard mileage rate

Mileage ☐ Only show records within the Current Time Period

Date	Origin	Destination	Mileage	Business Purpose
1/18/08	Home	Cindy Morton	5.0	Drop off product
1/18/08	Home	Office Depot	7.0	Supplies
1/26/08	Home	Joanne Roberts	52.0	Party
2/9/08	Home	Office Depot	7.0	Supplies
2/23/08	Home	Post Office	7.0	Postage
3/22/08	Home	San Rafael	65.0	Party
3/23/08	Home	Walmart	15.0	Party supplies
4/20/08	Home	Office Depot	7.0	Binder
5/4/08	Home	Walmart	15.0	Party supplies

Total Mileage for: 2002 Toyota Sienna

Year	Starting Odometer	Ending Odometer	Commute Miles	\$ per Mile	\$ per Mile	Rate Chg. Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2008	56981		570	.505			64	14	80	7	115								280
2009																			
2010																			
2011																			
2012																			
2013																			
2014																			

☒ Recalculate totals automatically

To add a vehicle to the program so you can start tracking deductions just do this:

1. Click on the **Vehicles** button on the main toolbar to go to the **Vehicles** screen.
2. Click on the **New** button in the **Vehicles** section of the screen to add a new vehicle record to the

display.

3. Select a deduction method in the [Vehicle Deduction Method](#) window and click **OK**.
4. Enter the **Make** and **Model** and select the model **Year** of the vehicle.
5. Enter the **Start Date** by typing or using the pop-up calendar.
6. Click on **Save** in the lower right corner of the screen.

Note: Entering or changing the **Start Date** will cause the display at the bottom of the **Vehicles** window to be populated with the years for which this vehicle could be "in service". You will want to use this display to track the **Starting Odometer** reading, **Ending Odometer** reading and **Commute Miles** (miles to and from your regular job) for your vehicle for each year that you use it in your business.

To add a mileage or expense entry just do this:

1. Make sure that the vehicle you are adding mileage or expenses for is selected in the **Vehicles** section of the **Vehicles** screen.
2. Click on the **New** button in the **Mileage** (or **Expenses**) section on the right side of the **Vehicles** window. (The heading on this section will depend on which **Deduction Method** is being used for the currently-selected vehicle.)
3. Enter the **Date** by typing or using the pop-up calendar.
4. If the **Deduction Method** for this vehicle is "Actual Expenses" enter the **Amount** and **Purpose** (what you purchased) into the new row in the display. If the **Deduction Method** for this vehicle is "Standard mileage rate", enter the **Origin** (where you started), the **Destination** (where you ended up), total **Mileage** and **Business Purpose** (why you made this trip) into the new row in the display. These entries will automatically complete if you have previously entered the same information providing that the "Automatically complete typing" option is selected in the [Preferences](#) window.
5. If you're adding more than one row, click on **New** again each time you would like to add a new row to the display. New rows will also be automatically added to the display if you press your TAB key at the end of the last row in the display.
6. Click on **Save** to save your new entry(ies).

At the end of each year you will need to make the following entries into the table at the bottom of the **Vehicles** screen.

1. Ending Odometer: the reading on your car's odometer at the end of the year. This entry will automatically carry over to the Starting Odometer field for the next year.
2. Commute Miles: the number of miles driven to and from your regular job during the year.
3. For vehicles using the Actual Expenses deduction method, you will need to enter the total Business Miles driven during the year so that the program can calculate the percentage of car expenses that are deductible based on the percentage of total miles that were driven for business.
4. For vehicles using the Standard Mileage Rate deduction method, you will need to enter the rate per mile (\$ per mile) that is allowed for a tax deduction. If this rate changed during the tax year, enter a second rate (\$ per mile) in the second field provided, then enter or select the date that the rate change took effect.

Note: All of the monthly columns as well as the "Total" column in the bottom display will be filled in automatically, either by having the "Recalculate totals automatically" checkbox checked or by clicking on the **Recalc** button from time to time after entering new mileage or expense records.

6.11.3 Editing or Deleting Vehicle Information

Consultant Front Office - Professional - Natural Beauty - [Vehicles]

File Categories Settings Accounts Samples Personal Use Loans Trades Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Vehicles

Make	Model	Year	Start Date	Deduction Method
Volkswagen	Jetta	2008	3/3/08	Actual expenses
Toyota	Sienna	2002	1/1/08	Standard mileage rate

Mileage ☐ Only show records within the Current Time Period

Date	Origin	Destination	Mileage	Business Purpose
1/18/08	Home	Cindy Morton	5.0	Drop off product
1/18/08	Home	Office Depot	7.0	Supplies
1/26/08	Home	Joanne Roberts	52.0	Party
2/9/08	Home	Office Depot	7.0	Supplies
2/23/08	Home	Post Office	7.0	Postage
3/22/08	Home	San Rafael	65.0	Party
3/23/08	Home	Walmart	15.0	Party supplies
4/20/08	Home	Office Depot	7.0	Binder
5/4/08	Home	Walmart	15.0	Party supplies

Total Mileage for: 2002 Toyota Sienna

Year	Starting Odometer	Ending Odometer	Commute Miles	\$ per Mile	\$ per Mile	Rate Chg. Date	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
2008	56981		570	.505			64	14	80	7	115								280
2009																			
2010																			
2011																			
2012																			
2013																			
2014																			

☒ Recalculate totals automatically

- To edit vehicle information in any section of the Vehicles screen::

1. Click into a field and make changes.
2. Click on **Save** to save your changes.

Note: The **Deduction Method** field cannot be changed once you have added a new vehicle to your records. If you change the method used for deducting expenses on a vehicle just enter a new record for that vehicle. This way, all of your previously-entered records will stay intact for recordkeeping purposes.

- To delete a vehicle record:

1. Click on a row in the **Vehicles** section of the **Vehicles** screen.
2. Click on the **Delete** button in the **Vehicles** section of the screen.
3. Repeat Steps 1- 2 to delete more vehicle records.
4. Click on **Save** to permanently delete the vehicle record.

- To delete a mileage or expense record:

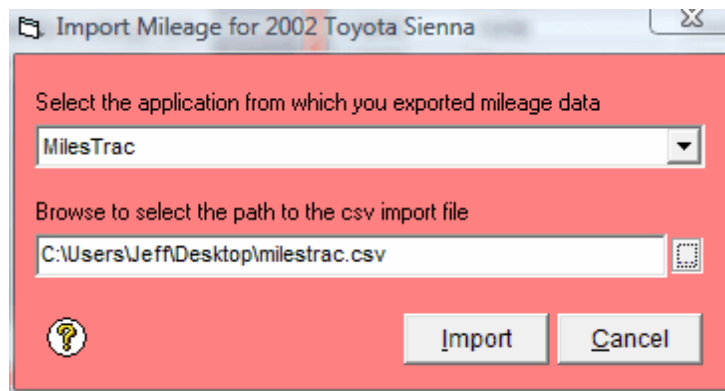
1. Click on a row in the **Mileage** or **Expenses** section of the **Vehicles** screen.
2. Click on the **Delete** button in the **Mileage** or **Expenses** section of the screen.
3. Repeat Steps 1-2 to delete more mileage or expense records.
4. Click on **Save** to permanently delete the record(s).

6.11.4 Importing Mileage Records

Mileage data from other applications, including most smart phone mileage-tracking applications, can be imported into the program to eliminate having to enter data twice. If your favorite mileage-tracking application isn't in our list of supported programs submit a support ticket to us and we'll be happy to look into adding it.

To import mileage data into the **Vehicles** screen do the following:

1. Select the appropriate vehicle from the table in the upper left corner of the **Vehicles** screen. The selected vehicle must be set to use the "Standard mileage rate" method of deduction for the **Import** button to be enabled.
2. Click on the **Import** button located under **Mileage** table on the **Vehicles** screen. This will open up the **Import Mileage** window.



3. Select the application from which you exported mileage data in the first selection box. If the application you use isn't listed please submit a support ticket to us and we'll be happy to look into adding it. For instructions regarding the "Other" option listed in the box, please see below.
4. Click on the ellipsis (...) button next to the second entry box and browse to locate the file you wish to import.
5. Click on **Import** to load the records into the **Vehicles** screen. A confirmation window will be displayed once importing has been completed, telling you how many records were imported and how many duplicates were skipped.
6. Click **OK** to close the confirmation window.
7. Click **Cancel** to close the **Import Mileage** window.
8. Examine the records that were imported on the main **Vehicles** screen. Make changes as required, then click on **Save** to save the imported entries. You must click on **Save** in order to permanently save the imported records.

Records can also be imported using a built-in, default CSV file format. To use the "Other (see Help)" import option, the import file must be a CSV (comma-separated value) file in the following format:

Position Contents in file

- | | |
|---|---|
| 1 | Date |
| 2 | Origin |
| 3 | Destination |
| 4 | Starting odometer reading (optional - required if miles driven is not provided) |
| 5 | Ending odometer reading (optional - required if miles driven is not provided) |
| 6 | Miles driven (optional - required if odometer readings are not provided) |

- 7 Rate per mile (optional - not currently used)
- 8 Notes / business purpose (optional but required by taxing agencies)

6.12 Home Office

6.12.1 Overview

List of all home offices ever used in your business

Specify home office area by square footage or number of rooms

Add or delete a home office

Add or delete a year

Consultant Front Office - Professional (full inventory) - Natural Beauty - [Home Office]

File Categories Settings Accounts Samples Personal Use Loans Trades Inventory Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Home Office(s)

Name	Address	City	State	Zip	Method
Main Office	14811 Ashton	Detroit	MI	48223	# of rooms

New Delete

Annual Expenses

Year	Months in Use	Total Rooms	Bus. Rooms	Home Insurance	Mortgage Interest	Property Taxes	Association Dues
2006	6	12	2	500.00	10000.00	4000.00	
2007	12	12		550.00	10000.00	4100.00	

New Delete

Monthly Expenses for: 2007

Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Cleaning services (house)	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	300.00
Cleaning supplies (house)	12.50		15.96	21.00	13.78		29.43			13.66	12.97	15.96	135.26
Maintenance (house)			225.00				450.00		112.74		74.56		862.30
Maintenance (office)				47.50				16.25				34.77	98.52
Other (house)													
Security (house)													
Utilities (house)	278.00	253.00	250.00	225.00	210.00	200.00	203.00	215.00	210.00	190.00	200.00	205.00	2,639.00
Utilities (office)	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	198.00

Pre-configured deductible expense categories

Annual expenses for the selected home office

Monthly expenses for the selected year

Save all changes

The **Home Office** screen is used to keep track of deductions resulting from the business use of one or more rooms in your home. It allows you to deduct expenses for as many home offices as you choose although a business will typically only have one home office. All of the common home office expense categories are listed on the screen to assist you in taking full advantage of this business deduction.

Home office information that you enter into the program is included in the program's **Income Tax** report and is summarized in the **Home Office Summary** report, both of which are available on the **Taxes** screen

The screen has three areas as follows:

- **Home Office(s):** This section of the screen contains a list of all of the home offices you have ever

used for a business purpose. It's perfectly fine to leave home offices on this list even if you're no longer using them in your business, since the program's reports will ignore them unless they have expense entries that occur within the time period for which the report is generated.

- **Annual Expenses:** This section of the screen contains annual expense entries for the home office that's currently selected in the **Home Office(s)** section of the screen.
- **Monthly Expenses:** This section of the screen contains monthly expense entries for the home office that's currently selected in the **Home Office(s)** section of the screen.

6.12.2 Entering Home Office Information

Home Office(s)

Name	Address	Address	City	State	Zip	Method
Main Office	14811 Ashton		Detroit	MI	48223	# of rooms

New Delete

Annual Expenses

Year	Months in Use	Total Rooms	Bus. Rooms	Home Insurance	Mortgage Interest	Property Taxes	Association Dues
2006	8	12	2	500.00	10000.00	4000.00	
2007	12	12	2	550.00	10000.00	4100.00	

New Delete

Monthly Expenses for: 2007

Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Cleaning services (house)	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	300.00
Cleaning supplies (house)	12.50		15.96	21.00	13.78		29.43			13.66	12.97	15.96	135.26
Maintenance (house)			225.00				450.00		112.74		74.56		862.30
Maintenance (office)				47.50				16.25				34.77	98.52
Other (house)													
Security (house)													
Utilities (house)	278.00	253.00	250.00	225.00	210.00	200.00	203.00	215.00	210.00	190.00	200.00	205.00	2,639.00
Utilities (office)	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	198.00

Save

- ☐ To add a home office to the program so you can start tracking deductions:
 1. Click on the **Home Office** button on the main toolbar to go to the **Home Office** screen.
 2. Click on the **New** button in the **Home Office(s)** section of the screen to add a new home office record to the display.
 3. Enter the **Name**, **Address**, **City**, **State** and **Zip** code and select the **Method** you would like to use to determine the percentage of your home that's being used as an office. The "# of rooms" method allows you to specify the number of rooms used for your business and the total number of rooms in your home. If the rooms in your home vary significantly in size you will probably be safer using the "Sq. footage" method. To use this method, you need to know the square footage in your home that's used for business and also the total square footage of your home..
 4. Click on **Save** in the lower right corner of the screen.

☐ To add an annual expense record for a home office:

1. Make sure that the home office you are adding expenses for is selected in the **Home Office(s)** section of the **Home Office** screen.
2. Click on the **New** button in the **Annual Expenses** section of the **Home Office** window.
3. Select the **Year** for which you wish to enter expenses.
4. Enter the months that the office was in use in the **Months in Use** field.
5. If the **Method** being used for this office is "# of rooms", enter the total number of rooms in your home in the **Total Rooms** field and the number of rooms used for your home office in the **Bus. Rooms** field. If the **Method** being used for this office is "Sq. footage", enter the total square footage of your home in the **Total Footage** field and the square footage of your home office in the **Bus. Footage** field.
6. Enter the total amount you paid in this year for **Home Insurance**, **Mortgage Interest**, **Property Taxes** and **Association Dues** in the fields provided. The amounts you enter should be your total household out-of-pocket expenses. The program will prorate these amounts appropriately based on the percentage of your home that was actually used for business.
7. Click on **Save** to save your new entry.

☐ To enter monthly expenses for a home office:

1. Make sure that the home office you are adding expenses for is selected in the **Home Office(s)** section of the **Home Office** screen.
2. Make sure that the year for which you are adding expenses is selected in the **Annual Expenses** section of the **Home Office** screen.
3. There are two types of monthly home office expenses - those that apply directly to the room(s) in your home that make up your office and those that apply to the house as a whole. If the **Description** in the **Monthly Expenses** table has the word "(office)" after it, then you will want to enter only expenses that directly impact that part of your home used as a home office. If the **Description** of an expense has the word "(house)" after it, then you will want to enter your total household expenses. "House" expenses will be prorated for tax purposes, based on the square footage or number of rooms in your home office.

To enter a monthly expense:

- a) Double click on the row in the table corresponding to the type of expense you wish to enter. This will display the **Home Office Details** window. Note that the category you are entering expenses for is displayed at the top of this window.
- b) Click on **New**. This will add a new row to the **Home Office Details** window.
- c) Enter the "Date" of the expense (m/d/yy) or select a date using the ellipsis (...) button to display a pop-up calendar.
- d) Enter the "Amount" of the expense.
- e) Select the "Method" of payment. If the expense was paid for using a check, enter the "Check" number in the appropriate field.
- f) Enter a "Note" if applicable to explain the nature of the expense.
- g) Click on **Save** to save your entries.
- h) If you're done making entries for this expense category, click on **Close** to close the **Home Office Details** window. Closing the pop-up window will automatically update the main **Home Office** screen to reflect all of your changes.

IMPORTANT: Home office expenses entered on the **Home Office** screen will be automatically added to your **Income Tax** report. **DO NOT** enter home office expenses on the **Income / Expenses** screen as this will result in these expenses being counted twice.

6.12.3 Editing or Deleting Home Office Information

Home Office(s)

Name	Address	City	State	Zip	Method
Main Office	14811 Ashton	Detroit	MI	48223	# of rooms

New Delete

Annual Expenses

Year	Months in Use	Total Rooms	Bus. Rooms	Home Insurance	Mortgage Interest	Property Taxes	Association Dues
2006	6	12	2	500.00	10000.00	4000.00	
2007	12	12	2	550.00	10000.00	4100.00	

New Delete

Monthly Expenses for: 2007

Description	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Total
Cleaning services (house)	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	25.00	300.00
Cleaning supplies (house)	12.50		15.95	21.00	13.78		29.43			13.66	12.97	15.96	135.26
Maintenance (house)			225.00				450.00		112.74		74.56		862.30
Maintenance (office)				47.50				16.25				34.77	98.52
Other (house)													
Security (house)													
Utilities (house)	278.00	253.00	250.00	225.00	210.00	200.00	203.00	215.00	210.00	190.00	200.00	205.00	2,639.00
Utilities (office)	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	16.50	198.00

Save

- ☐ To edit information in the Home Office or Annual Expenses sections of the screen:
 1. Click into a field and make changes.
 2. Click on **Save** to save your changes.
- ☐ To edit information in the Monthly Expenses section of the screen:
 1. Double click on the row in the "Monthly Expenses" table corresponding to the type of expense you wish to edit. This will display the **Home Office Details** window. Note that the category you are editing expenses for is displayed at the top of this window.
 2. Click into any field in this window and make changes.
 3. Click on **Save** to save your entries.
 4. If you're done editing this expense category, click on **Close** to close the **Home Office Details** window. Closing the pop-up window will automatically update the main **Home Office** screen to reflect all of your changes.
- ☐ To delete a home office record:
 1. Click on a row in the **Home Office(s)** section of the **Home Office** screen.
 2. Click on the **Delete** button in the **Home Office(s)** section of the screen.
 3. Repeat Steps 1-2 to delete more home office records.
 4. Click on **Save** to permanently delete the record(s).

☐ To delete an annual expense record.

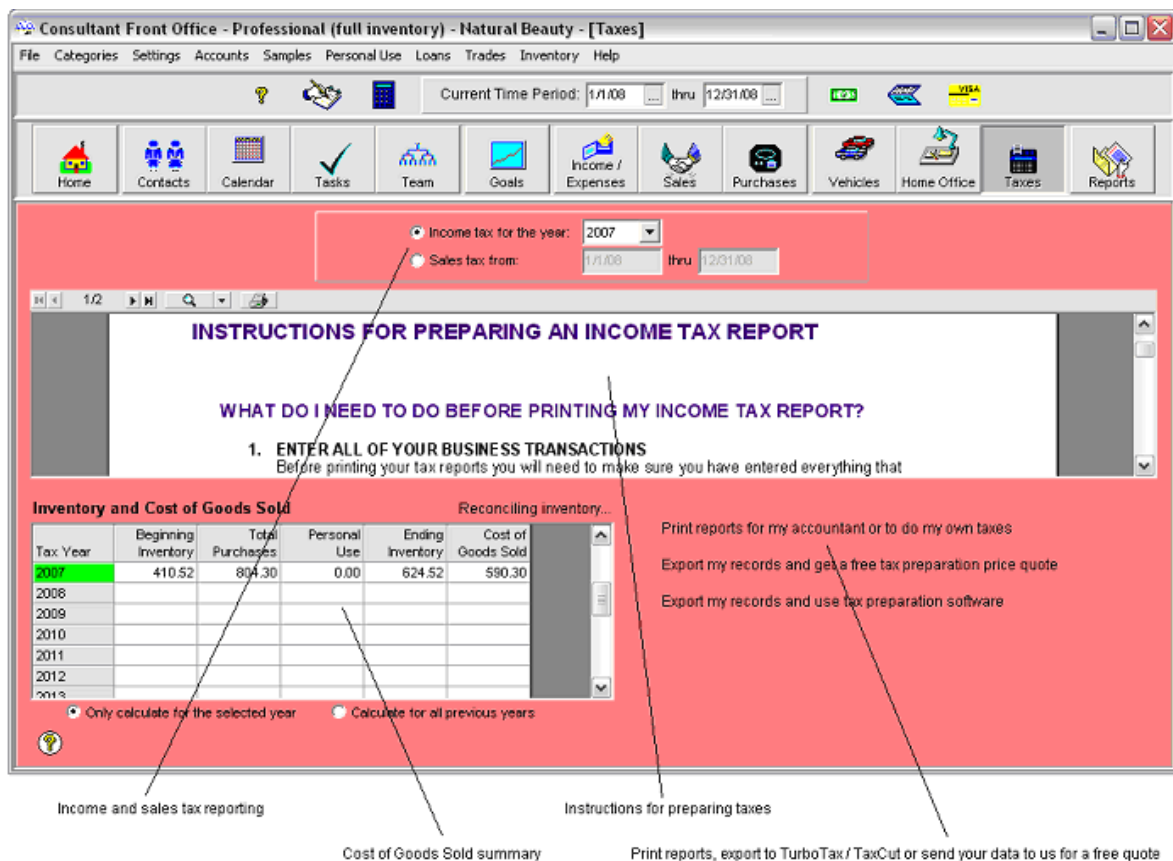
1. Click on a row in the **Annual Expenses** section of the **Home Office(s)** screen.
2. Click on the **Delete** button in the **Annuals Expenses** section of the screen.
3. Repeat Steps 1-2 to delete more annual expense records.
4. Click on **Save** to permanently delete the record(s).

☐ To delete a monthly expense record

1. Double click on the row in the "Monthly Expenses" table corresponding to the type of expense you wish to delete. This will display the **Home Office Details** window. Note that the category you are editing expenses for is displayed at the top of this window.
2. Select a row by clicking anywhere on it. This will turn the selected row blue.
3. Click on **Delete** to remove the selected row from the table.
4. Click on **Save** to save your entries.
5. If you're done editing this expense category, click on **Close** to close the **Home Office Details** window. Closing the pop-up window will automatically update the main **Home Office** screen to reflect all of your changes

6.13 Taxes

6.13.1 Overview



The **Taxes** screen is designed to assist you in easily and accurately preparing your business income and sales tax reports. If your company collects and pays sales tax for you then you will not need to use the sales tax portion of this screen.

Income Tax

To prepare your business income tax reports select the "Income tax for the year" option at the top of the **Taxes** screen, then select the year for which you are preparing taxes. If your business operates on a non-calendar fiscal year (e.g. July 1 - June 30), you will need to print your **Income Tax** report from the **Reports** screen instead of from the **Taxes** screen. Printing this report from the **Reports** screen allows you to specify the time period for the report using the [Current Time Period](#) at the top of the program. This option for printing the report is only available in the Professional Edition of the program.

Next, follow the instructions displayed on the **Taxes** screen to make sure your records are complete and accurate prior to printing or exporting your data.

Sales Tax

To prepare your business sales tax report select the "Sales tax from" option at the top of the **Taxes** screen, then select the time period for which you are preparing taxes.

Next, follow the instructions displayed on the **Taxes** screen to make sure your records are

complete and accurate prior to printing your sales tax report.

Consultant Front Office - Professional (full inventory) - Natural Beauty - [Taxes]

File Categories Settings Accounts Samples Personal Use Loans Trades Inventory Help

Current Time Period: 1/1/08 thru 12/31/08

Home Contacts Calendar Tasks Team Goals Income / Expenses Sales Purchases Vehicles Home Office Taxes Reports

Income tax for the year: 2007

Sales tax from: 1/1/08 thru 12/31/08

INSTRUCTIONS FOR PREPARING A SALES TAX REPORT

WHAT DO I NEED TO DO BEFORE PRINTING MY SALES TAX REPORT?

1. ENTER ALL OF YOUR BUSINESS TRANSACTIONS
Before printing your tax report you will need to make sure you have entered any tax that you paid or received in connection with the sale of products during the tax period. This includes tax paid on

Inventory and Cost of Goods Sold

Tax Year	Beginning Inventory	Total Purchases	Personal Use	Ending Inventory	Cost of Goods Sold
2007	410.52	804.30	0.00	624.52	590.30
2008					
2009					
2010					
2011					
2012					

Reconciling Inventory...

Print reports for my accountant or to do my own taxes

☒ Only calculate for the selected year ☐ Calculate for all previous years

6.13.2 Inventory and Cost of Goods Sold (Full-Inventory)

The **Inventory and Cost of Goods Sold** display in the lower left corner of the **Taxes** screen must be completed prior to printing your final **Income Tax** report. Please see the instructions on the **Taxes** screen for information on completing the entries in this section of the screen.

6.13.3 Printing Tax Reports

Tax reports are printed using the options in the lower right corner of the **Taxes** screen. Please see the instructions displayed on the **Taxes** screen to make sure your entries are complete and accurate prior to printing final tax reports.

6.13.4 Obtaining a Free Tax Preparation Price Quote

Your data can be exported and sent to our partner accounting firm for a free tax preparation price quote, using the appropriate option in the lower right corner of the **Taxes** screen. Please see the instructions displayed on the **Taxes** screen to make sure your entries are complete and accurate prior to using this option. You will be asked to confirm that you have reviewed your data in this manner prior to the data actually be exported and sent.

6.13.5 Exporting Data to TurboTax or TaxCut

Your data can be exported to a ".txf" file for importing into popular tax preparation software including TurboTax and TaxCut, using the appropriate option in the lower right corner of the **Taxes** screen. Please see the instructions displayed on the **Taxes** screen to make sure your entries are complete and accurate prior to using this option.

Exporting in the ".txf" format currently includes / excludes the following types of information. Most of the exclusions are due to limitations in the TXF specification that do not allow the inclusion of all fields necessary to fill out your tax forms.

Included

- Product sales and sales of supplies from the Sales screen (Schedule C - Line 1)
- Income entries from the Income / Expenses screen (Schedule C - Line 1)
- Product Cost of Goods Sold (Schedule C - Lines 4 and 42)
- Expense entries from the Income / Expenses screen (Schedule C - Part II and Part V)
- Home office expenses (Schedule C - Line 30)

Excluded

- Product purchases and personal use (Schedule C - Line 36)
- Car and truck expenses (Schedule C - Line 9)

6.14 Miscellaneous

6.14.1 Drop Ships

Sales transactions in which the product is drop-shipped to your host or customer, directly from your parent company, need not be shown as a sales transaction **unless you personally receive payment for or make payment for the products that are purchased**. If the money never passes through your hands you can simply record the income you receive from your parent company as a result of the transaction using the **Income** screen. If you'd like to have a record of what was purchased and by whom, check the "Commission only" checkbox on the **Sales** screen when you record the sale. This will give you a filterable, sales record without impacting your financial records

6.14.2 Free Products

Sales

"Free" products you give away at no cost should be entered on the **Sales** screen or using the **Withdrawal** option on the **Samples** menu. When entering free products on the **Sales** screen, first select the product then enter a "0" in the **Unit Price** box for that line item.

Purchases

There is nothing special you need to do when you receive free products from your company.

Simply enter a purchase that includes free products in the same manner you would enter any other purchase.

6.14.3 Obsolete Products

There is nothing you need to do when a product must be disposed of because it is obsolete, whether or not you receive replacement product from your company. The impact of this event, if any, will be accounted for when you add up your ending inventory on the **Taxes** screen at the end of the year.

6.14.4 Product Exchanges

If a customer wishes to exchange a product just edit the original **Sales** entry for that item and make the appropriate change.

6.14.5 Product Returns

How you handle a product return depends on whether or not you have already been paid for the product as follows:

- ☐ If you have not yet been paid for the product
 - Just delete the Sales entry for that item.
- ☐ If you have already been paid for the product
 - Leave the original Sales entry intact and unmodified.
 - Record an **Expense** transaction on the **Income / Expenses** screen using the "Returns" category for the amount refunded to your customer.

Part



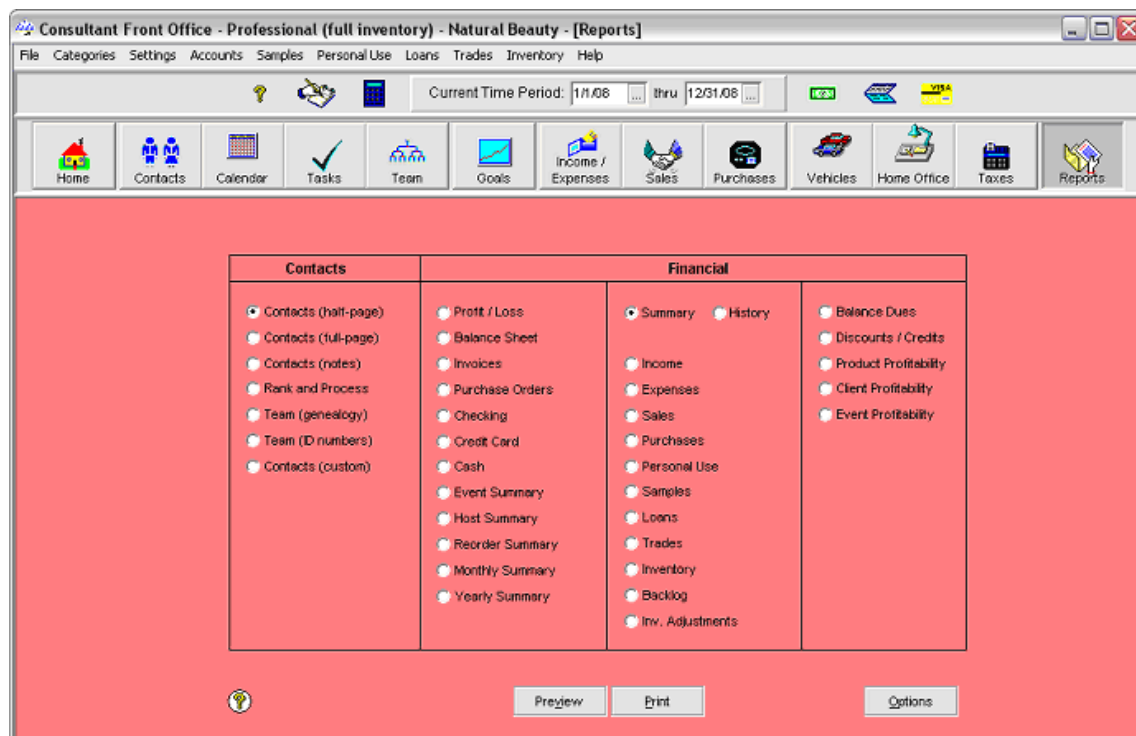
VII

Reports

7 Reports

7.1 Printed Reports

All of the summary and historical information available throughout the program, is also available for full-page preview and printing from the **Reports** screen. In addition, this screen offers numerous reports not accessible from other parts of the program, as described below.



☐ Contacts

- **Contacts (half-page):** an alphabetical listing of all of the selected address records, displayed in an 8 1/2" x 5 1/2" (personal organizer) format.
- **Contacts (full-page):** same as above in an 8 1/2" x 11" (landscape) format.
- **Contacts (notes):** complete listing information for all of the filtered address records, displayed in an 8 1/2" x 11" (portrait) format.
- **Rank and Process:** an alphabetical listing of all currently filtered contact names, showing each person's rank and a list of the process steps they have completed.
- **Team (genealogy):** a hierarchical tree diagram of all of the selected downline listings.
- **Team (ID numbers):** an alphabetical listing of downline names and I.D. numbers for the current business.
- **Contacts (custom):** this report option allows you to create and save custom contact reports by selecting from any of your contact fields.

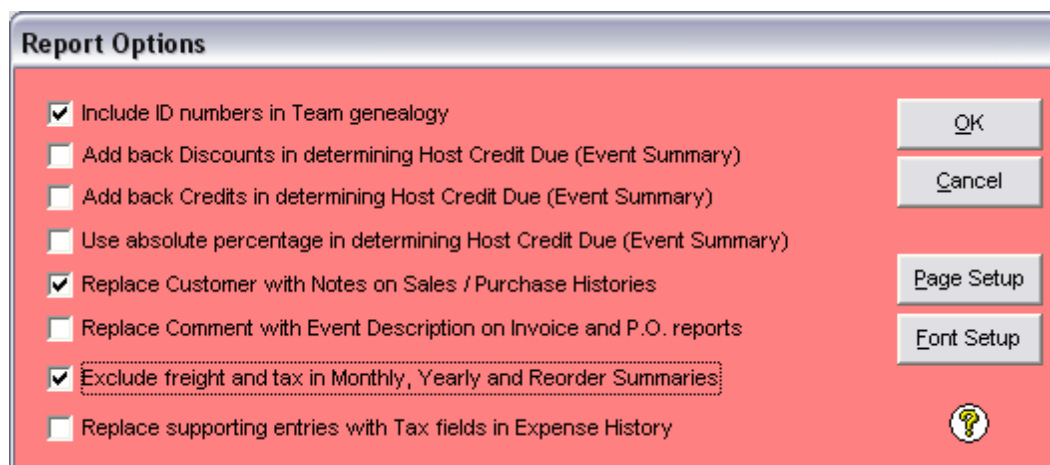
☐ Financial

- **Profit / Loss:** a conventionally formatted statement of income, expenses, gross margin and pre-

tax income..

- **Balance Sheet:** (Full-Inventory Edition) a statement of assets and liabilities based partly on entries made throughout the program and partly on entries made in the **Balance Sheet Settings** window.
- **Income Tax Report:** an IRS-formatted statement containing exactly the numbers you need to fill out Federal Tax Schedule C. In general, the recommended way to print this report is from the **Taxes** screen. If you need to use a time period that's different than a calendar year (e.g. July 1 2007 through June 30 2008), set the **Current Time Period** to the desired date range, then print the report using the "Income Tax Report" option on the **Reports** screen.
- **Invoices:** an index of all invoices created during the Current Time Period.
- **Purchase Orders:** an index of all purchase orders created during the Current Time Period.
- **Checking:** a history of all checking account activity during the Current Time Period.
- **Credit Card:** a history of all credit card account activity during the Current Time Period.
- **Cash:** a history of all cash account activity during the Current Time Period.
- **Event Summary:** a summary of activity for a selected event including profits.
- **Host Summary:** a summary of activity for a selected event. not including profits.
- **Reorder Summary:** a summary of reorder activity during the Current Time Period. A reorder sale is any sale for which the **Reorder** checkbox on the **Sales** screen was checked when the sale was recorded. Freight and tax will be included unless the [option](#) to exclude them has been selected.
- **Monthly Summary:** a summary of financial activity for any selected month. Freight and tax will be included unless the [option](#) to exclude them has been selected.
- **Yearly Summary:** a summary of financial activity for any selected year. Freight and tax will be included unless the [option](#) to exclude them has been selected.
- **Income:** a summary or history of your income entries for the Current Time Period.
- **Expenses:** a summary or history of your expense entries for the Current Time Period.
- **Sales:** a summary or history of your sales entries, excluding all freight and tax, for the Current Time Period
- **Purchases:** a summary or history of your purchase entries, excluding all freight and tax, for the Current Time Period.
- **Samples:** a summary or history of your sample entries, excluding all freight and tax, for the Current Time Period.
- **Personal Use:** a summary or history of your personal use entries, excluding all freight and tax, for the Current Time Period.
- **Loans:** a summary or history of your borrow and loan entries, excluding all freight and tax, for the Current Time Period.
- **Trades:** a summary or history of your trade entries, excluding all freight and tax, for the Current Time Period.
- **Inventory:** (Full-Inventory Edition) a summary or history of inventory transactions, excluding all freight and tax.
- **Backlog:** (Full-Inventory Edition) a summary or history of your current inventory backlog.
- **Inventory Adjustments:** (Full-Inventory Edition) a summary or history addition and withdrawal adjustments for the Current Time Period.
- **Balance Dues:** a history of all invoices showing a balance due, along with contact and credit card information.
- **Discounts and Credits:** a history of all invoices where a **Discount** or **Credit** was entered.
- **Product Profitability:** a profitability analysis for selected products.
- **Client Profitability:** a profitability analysis for selected clients.
- **Event Profitability:** a profitability comparison of selected **Events**.

7.2 Report Options



Page and **Font** formatting are available for all reports via the **Options** button on the **Reports** screen. This button displays the **Report Options** window allowing you additional options as follows:

Include ID numbers in Team Hierarchy

Instructs the program to include your team members' ID numbers, as entered on the **Contacts** screen, when previewing or printing a **Team Hierarchy** report.

Add back Discounts in determining Host Credit Due

Instructs the program to add back the value of all **Discounts** entered on the **Sales** screen when calculating the **Host Credit Due** in the **Event Summary** and **Host Summary** reports.

Add back Credits in determining Host Credit Due

Instructs the program to add back the value of all **Credits** entered on the **Sales** screen when calculating the **Host Credit Due** in the **Event Summary** and **Host Summary** reports.

Use absolute percentage in determining Host Credit Due

Instructs the program to base the **Host Credit Due** on the exact result of multiplying the **Host Credit Percent** by the **Total Retail** in the **Event Summary** and **Host Summary** reports. If this option is not selected, the **Total Retail** is rounded down to the next \$100 increment before being multiplied by the **Host Credit Percent** to determine the **Host Credit Due**.

Replace Customer with Notes on Sales / Purchase ...

Instructs the program to use the **Notes** field instead of the **Customer** field on **Sales** and **Purchase Histories**.

Replace Comment with Event Description ...

Instructs the program to use the **Event Description** instead of the **PO** or **Invoice Comment** on **Invoice** and **PO** reports.

Exclude Freight and Tax in...

Instructs the program to exclude the value of **Freight** and **Tax** in preparing the listed reports.

Replace supporting entries with Tax fields...

Instructs the program to use the Tax fields instead of the Travel, Meals, Entertainment and Mileage supporting entries in the Expense History report (this option is only available if you have elected to have one or both of the tax columns visible on the **Income** and **Expenses** screens - see [Settings Menu - Preferences](#)).

7.3 Filtering Reports

Many of the reports available on the **Reports** screen can be filtered based on one or more of the report's fields. Filter selection boxes (if applicable) are automatically displayed whenever you click on either the **Preview** or **Print** button at the bottom of the **Reports** screen. Many reports can also be sorted on up to three fields by clicking on the **Sort** button in the filter window.

Filter settings only affect the very next **Preview** or **Print** operation. You can create one or more filter "templates" using the **Save** option on the **File** menu in the report filter window. Saved templates can be recalled using the **Open** option on the **File** menu. Saving a filter template saves the first 50 selections in each of the "Filter" selection boxes.

To print a filtered report after previewing it, use the **Print** button at the bottom of the **Preview** window. Closing the **Preview** window and then clicking on **Print** will require you to re-select your filter settings.

The financial filter window contains the following options:

Report Heading	Reflects the report heading for the report being created. Choose to use the default heading ("Use default"), which automatically reflects the filter settings you select, or create your own heading using the Allow editing option.
Report Dates	A filter allowing you to select whether to view all records regardless of date or to view only records within a specific time period. The filtering time period defaults to the Current Time Period you have set at the top of the main screen. Dates can be changed by typing, using your up and down arrow keys or using the pop-up calendar.
Filter by Customer	A filter allowing you to limit the report to transactions involving one or more of your customers. Right clicking allows you to select or deselect all of the items in the Filter by customer selection box. Clicking on the ellipsis (...) button to the right of the Filter by customer selection box allows you to select contacts directly from the main Contacts window. Clicking on the Filter button to the right of the Filter by customer checkbox, allows you to Filter , Search or Select which contacts appear in the Filter by customer selection box. (Note: Contact Filter , Search and Select results are not saved when you save your filtering conditions using the Save option on the File menu in the Filter by customer window. The list of contact names always includes all of your contact listings each time the filtering window is opened).
Filter by Product	A filter allowing you to limit the report to transactions involving one or more products. Right clicking allows you to select or deselect all of the items in the Filter by product selection box. Clicking on the ellipsis (...) button to the right of the Filter by product selection box allows you to select products directly from the main Products window. Holding down your CTRL key while clicking with your mouse in the Products window allows you to select more than one product at a time.
Filter by Event	A filter allowing you to limit the report to transactions involving one or more Events . Right clicking allows you to select or deselect all of the items in the Filter by Event selection box. Clicking on the ellipsis (...) button to the right of the Filter by Event selection box allows you to select events directly from the main Events window. Holding down your CTRL key while clicking with your mouse in the Events window allows you to select more than one Event at a time.
Filter by Category	A filter allowing you to limit the report to transactions involving one or more categories (e.g. Income or Expense categories like

"Commissions" or "**Office Expenses"). Right clicking allows you to select or deselect all of the items in the **Filter by category** selection box.

Filter by Method...	A filter allowing you to limit the report to transactions involving one or more methods of payment. Right clicking allows you to select or deselect all of the items in the Filter by method of payment selection box.
Show Reorders only	An option to limit the report to transactions where the Reorder checkbox on the Sales screen was checked when the transaction was recorded.
Show Balance Dues ...	An option to limit the report to transactions where full or partial payment is still due.
Show Not Delivered ...	An option to limit the report to transactions where the Del checkbox on the Sales screen or the Rcv box on the Purchases screen was not checked when the transaction was recorded.
Show Not Returned ...	An option to limit the report to Loan and Borrow transactions where the product loaned or borrowed has not been marked as returned.
Show zero dollar Sales...	An option to limit the Sales report to line items where the price was set to zero dollars.
Order type	A filter allowing you to distinguish between Inside and Outside Event sales
Taxability	An option to limit the report based on whether or not an item was set as taxable at the time the entry was recorded.
Direct Update credit	An option to limit the report based on whether or not a Sales transaction reflects an imported "credit" brought in using the Update Direct function on the File menu (only visible for companies that support Direct Updating).

7.4 Sorting Reports

Many of the reports available on the **Reports** screen can be sorted on up to three fields prior to previewing or printing. If a report is sortable, then clicking on **Preview** or **Print** will either display the **Sort** window directly or there will be a **Sort** button available in the report filtering window.

The **Sort** window allows you to select up to three fields for sorting in either ascending or descending order. The sequence of the fields selected in the **Sort** window is the sequence in which the report will be sorted. The first field selected will be the overriding sort field. Viewing the report it should be obvious that this was the field that the report was sorted on. Selecting a second sort field will cause

the report to be sorted by that field *only where there are records with identical values in the first sort order field*. Selecting a second sort field will not disrupt the sort order based on the first field.

All of the "spreadsheet" type displays throughout the program can also be sorted prior to printing by clicking directly on any of the column headings in the display. The program will remember the last sort order of each display and will automatically sort the window that way the next time it is opened.

7.5 Custom Contact Reports

This option allows you to create and save custom contact reports. Clicking on the **Contacts (custom)** report option displays the **Contact Custom Report** window.

Contact Custom Report: Customer Follow-up

File

Report Heading

Customer Follow-up

Report Body (click on column headings to select fields)

First	Last	Pri. Group	Order Date	Order Amt.	Phone	Cellular
Jamie	Goldsmith	Downline	5/28/2005	103.27	(884) 388-4726	
Robert	Jantzen	Downline	1/20/2005	176.53	(415) 363-4556	
Sarah	Jantzen	Downline	2/5/2006	164.84	415-363-4556	
Gregg	Loren	Downline	1/25/2005	89.52		
Claire	Masters	Downline	3/15/2005	88.95		
Jennifer	Michaels	Downline	1/20/2005	204.39	415-344-6785	
Steve	Nichols	Downline	1/18/2005	367.45		
Kendall	Nicole	Customer	5/15/2005	117.69	(650) 594-9058	(650) 533-7636
Jamie	Roberts	Import	2/1/2005	176.53	415-343-3988	

Page Setup Font Setup Filter Sort Done Cancel

Clicking on any of the column headings in this window allows you to select any of your contact database fields to be included in the report. Selecting a field will also cause the display to be filled in with entries from your contact database. Fields in the report can be resized using your mouse by hovering over the line between two fields in the gray column heading area. Page and font formatting are also available via the **Page** and **Font** buttons in this window.

Report definitions can be saved for reuse using the **Save** option on the **File** menu. You can also **Open** or **Delete** saved reports using the respective options on the **File** menu.

Before previewing or printing a custom report you can use the **Filter** button in the **Custom Contact Report** window to apply filter, search and select conditions that will determine which listings get printed in the report

7.6 Profit Loss Report

The **Profit / Loss** report is an income statement that gives you a snapshot of how your business is doing from a financial standpoint. The following descriptions explain how the numbers in this report are calculated.

Sales	The sum of all sales entries with the exception of Supplies . This total includes any <i>freight and tax</i> that were entered as part of your sales transactions.
Other Income	The sum of all income entries plus entries made in the Supplies field on the Edit Sales screen.
Purchases	The sum of all purchase entries with the exception of Supplies . This total includes <i>freight and tax</i> that were entered as part of your purchase transactions.
Operating Expenses	The sum of all expense entries plus entries made in the Supplies field on the Edit Purchases screen.
Gross Margin	The result of subtracting Purchases from Sales and then dividing by Sales . Gross Margin = (Sales – Purchases) / Sales

Upgrading From a Previous Version

If you have used this program to manage your business in previous years, you may notice that the "Operating Expenses" entry no longer exactly matches the earlier value. This is because vehicle expenses are no longer included in this report.

7.7 Balance Sheet Report

All of the values in the Balance Sheet report are governed by the Current Time Period setting at the top of the screen. The following descriptions explain how some of the numbers on this report are calculated.

Cash, Checking, Credit	The current balances of your Cash , Checking and Credit accounts. Positive balances are shown in the Assets column and negative balances in the Liabilities column.
Receivables	The sum of all outstanding balances on sales invoices.
Payables	The sum of all outstanding balances on purchase orders.

The remaining items on the **Balance Sheet** report are based on the entries you make in the **Balance Sheet Settings** window.

7.8 Income Tax Report

The **Income Tax Report** is a Schedule-C formatted document containing everything you need to fill out your business tax forms. When printed from the **Reports** screen, all of the values in the Income Tax Report are governed by the **Current Time Period**. When printed from the **Taxes** screen, the year selected at the top of the screen governs the values that appear in the report.

The following descriptions explain how some of the numbers on this report are calculated.

Line 1: Gross Receipts	The sum of all Income and Sales entries including Supplies , Freight and Tax for the specified time period. If you pay sales or VAT tax to your Board of Equalization or other tax agency, make sure that you have entered all of your tax payments on the Expenses screen prior to printing your final tax report. If you have any unpaid balances (Bal Due) on the Sales screen, please talk to your tax advisor about how these balances should be accounted for. The correct way to handle these balances will depend on the method of accounting (Cash or Accrual) being used for your business.
Line 4: Cost of Goods Sold	Copied from Line 42: Cost of Goods Sold , this number represents the cost of all of the products you purchased during the specified time period that are not still on your shelf and that were not used for your own personal use.
Line 6: Other Income	Specific types of income that should not be relevant to your business. This field is always set to zero.
Line 9: Car Expenses	The sum of all vehicle deductions that were entered on the Vehicles screen for the specified time period.
Line 22: Supplies	The sum of all expense entries entered using the "**Supplies" expense category PLUS the value of all Supplies entered on the Purchases screen.
Line 30: Home Office	The prorated sum of all home office deductions that were entered on the Home Office screen for the specified time period. This value may be less than you expect if your home office deduction is limited due by the amount of income earned in your business.
Line 35: Beginning Inventory	The value of your inventory at the beginning of the year for

which the report is being printed (or the value at the beginning of the Current Time Period if printing from the **Reports** screen).

Line 36: Purchases less personal use The sum of all **Purchases** entries including **Freight** and **Tax** but not **Supplies**, minus the sum of all **Personal Use** entries.

Line 39: Other Costs This value is always set to zero.

Line 41: Ending Inventory The value of your inventory at the end of the year for which the report is being printed (or the value at the end of the Current Time Period if printing from the **Reports** screen).

Upgrading From a Previous Version

If you have used this program to prepare your business taxes in previous years, you will notice that the values in the Income Tax report no longer exactly match the earlier values. This is primarily because tax and freight payments that were previously split up between product purchases and business supplies (aka Bus Items) are now added in their entirety to line 36 (Purchases less personal use). This means that some tax and freight payments that used to show up as an expense in Part V now show up in Part III as part of your Cost of Goods Sold. This change was made to make it easier to verify the completeness and accuracy of your purchase entries, by simply comparing your entries on the **Purchases** screen with the paperwork you receive from your company when you purchase products.

7.9 Sales Tax Report

The **Sales Tax Report** contains information to assist you in paying sales or VAT taxes to your state Board of Equalization or other tax agency. If your state or province does not charge tax on product sales or if you pay this tax when you purchase your products, you will probably not need to use this report. All of the values in the Sales Tax report are governed by the dates at the top of the **Taxes** screen. The following descriptions explain how some of the numbers on this report are calculated.

Taxable Sales The sum of all **Sales** entries with the exception of **Supplies** and **Tax** entries during the specified time period.

Taxable Freight The sum of all **Freight** entries made on the **Edit Sales** screen during the specified time period, assuming you have instructed the program to charge tax on **Freight** for product sales. This line will not appear on the report (please see [Setting Tax Rates](#)) if tax is not being charged on freight.

Samples / Personal Use Basic, Standard and Professional: Estimate the *cost* of your Personal Use and Sample usage. If you have used either or both of these menu options to track the quantity of product used for these purposes you can multiply the quantity times your typical cost to determine the total amount.

	Full-Inventory Edition: The sum of the inventory values for all withdrawals made in the Personal Use or Samples windows during the specified time period.
Sales Tax Owed	The result of multiplying your Taxable Total by the current sales tax rate setting which is also shown in this report under the Sales Tax Rate heading.
Purchase Tax Paid	The sum of all of the tax entries that were entered on the Purchases screen during the specified time period.
Balance / Refund Due	The result of subtracting Purchase Tax Paid from Sales Tax Owed .
Total Sales	The sum of all of your Sales during the specified time period excluding Freight and Tax .

The **Sales Tax Owed** can be different from the **Purchase Tax Paid** for the following reasons:

- You will typically pay tax on the *retail price* for all of the taxable products you purchase, but the program will calculate the tax you owe on Personal Use and Sample products based on their cost. Whether or not this is correct for your business depends on the arrangements your company has made with your particular state with respect to sales tax, if such an arrangement exists.
- You did not collect the right amount of tax from your customers. This can happen if the tax settings in place when some or all of your **Sales** were entered did not accurately reflect the way your company charges tax when you purchase products.
- The taxability setting for some of the products in the [Products](#) window did not accurately reflect what your company charges you tax on at the time some or all of your **Sales** were entered.

7.10 Event and Host Summary Reports

The **Event Summary** report is a comprehensive summary of **all activities that were linked to a specific event at the time they were entered** and is **not governed by the Current Time Period setting at the top of the screen**. The following descriptions explain how some of the numbers on this report are calculated.

Total Retail	The retail total from all invoices that have been linked to this Event.
Retail COGS	Basic, Standard and Professional Editions: The sum of all product purchases that were linked to this Event when they were entered. Full-Inventory Edition: The value (cost) of the items removed from your inventory to fill orders for this Event. Inventory values are determined at the time an item gets added to your inventory.
Event Income, Expenses	The sum of all event entries made on the Income and Expenses screen respectively.
Host Credit Basis	This entry will be the same as the Total Retail shown in the Event

Summary and **Host Summary** reports, unless you have selected either the **Include Discounts in determining Host Credit Due** or **Include Credits in determining Host Credit Due** report options. These options are accessible via the **Options** button on the **Reports** screen. Selecting either or both of these options will increase the amount shown in the **Host Credit Basis** entry.

Host Credit Due

The product of the **Host Credit Percent** and the **Host Credit Basis** for this Event. If the option to **Use absolute percentage in determining Host Credit Due** is selected in the **Report Options** window, then this entry will be the exact result of multiplying these two values together. If this option is not selected, then the **Host Credit Basis** will be rounded down to the next \$100 increment before being multiplied by the **Host Credit Percent** to determine the **Host Credit Due**.

Inside Orders

The number of event invoices with the **Inside Order** box on the **Sales** screen checked when they were recorded.

Outside Orders

The number of event invoices with the **Inside Order** box on the **Sales** screen *not* checked when they were recorded.

Tip: The report [Options](#) that read "Include Discounts in determining Host Credit Due" and "Include Credits in determining Host Credit Due" will increase **Event Sales** in the **Event Summary** and **Host Summary** reports by the amount of **Discounts** and **Credits** entered when the event's sales were entered. To exclude **Discounts** and **Credits** from the **Event Sales** totals in these reports, leave this option unchecked.

7.11 Monthly Summary Report

The **Monthly Summary** report is a Profit / Loss statement for your business for the selected month. The following descriptions explain how some of the numbers on this report are calculated. This report includes freight and tax entries unless the option to exclude them has been selected using the [Options](#) button on the **Reports** screen.

Event Sales

The sum of all sales for the selected month, for which an event was selected in the **Event** box on the **Edit Sales** screen at the time the sale was entered.

Reorder Sales

The sum of all sales for the selected month, for which the **Reorder** checkbox was checked on the **Edit Sales** screen at the time the sale was entered.

Other Sales

The sum of all sales for the selected month, for which no event was selected in the **Event** box on the **Edit Sales** screen and the **Reorder** checkbox was not checked at the time the sale was entered.

Purchases	The sum of all purchase entries for the selected month. This entry includes the value of <i>freight</i> and <i>tax</i> entered on the Purchases screen.
Income	The sum of all Income entries for the selected month.
Expenses	The sum of all Expense entries for the selected month.
Net Profit or Loss	Event Sales + Reorder Sales + Other Sales + Income – Cost of Goods Sold – Expenses

7.12 Yearly Summary Report

The **Monthly Summary** report is a Profit / Loss statement for your business for the selected month. The following descriptions explain how some of the numbers on this report are calculated. This report includes freight and tax entries unless the option to exclude them has been selected using the [Options](#) button on the **Reports** screen.

Sales	The sum of all Sales entries for the selected year.
Income	The sum of all Income entries for the selected year.
Expenses	The sum of all Expense entries for the selected year.
Profit	Sales + Income - Cost of Goods Sold – Expenses
Events	The total number of Events for the selected year.

Part



Menu Bar

8 Menu Bar

8.1 File

8.1.1 New Business

If the number of existing businesses is two or less, this option displays the **Business Setup** window and prompts you to enter a name for the new business. If the maximum of three businesses already exist the **New Business** menu option will be disabled.

8.1.2 Change Business

This option displays the **Business Selection** window and prompts you to select a business to open.

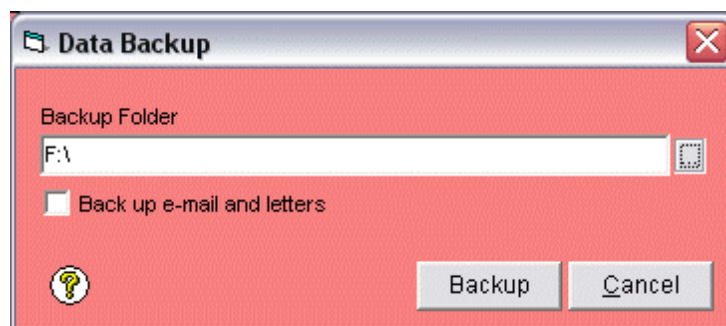
8.1.3 Rename Business

This option displays the **Business Name Change** window and prompts you to enter a new name for the currently active business.



8.1.4 Backup

This option displays the **Data Backup** window allowing you to back up all of the business information entered into the program.



Backing up your data allows you to rebuild your records in the event that your hard drive becomes damaged or non-operational. The **File Backup** option backs up data for all of the businesses you're currently tracking, no matter which business is currently selected. Checking the box that reads

"Back up email and letters" may significantly increase the size of the backup file and the time it takes to complete the backup operation.

To back up all of your business records for all of your active businesses just do this:

1. Click on the ellipsis (...) button to browse for a folder and select a location where the backup file will be created.
2. Check or uncheck the **Back up email and letters** checkbox.
3. Click on the **Backup** button to begin the backup process.
4. Observe the confirmation window to ensure that the backup file was created successfully and that you know the location it was saved to.

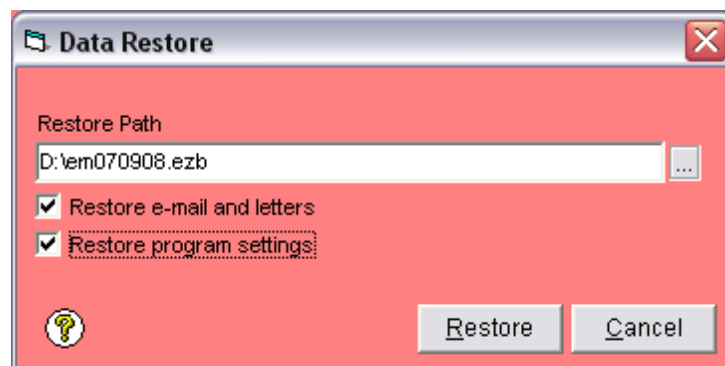
IMPORTANT: It is strongly recommended that you back up to an external hard drive, USB memory stick or some other location that is not on your main hard drive, so that the backup file will not be compromised in the event of a virus or hard drive malfunction. To have the program create backup files for you automatically the first time it's opened each day click on the [Auto Backup Path](#) option on the **File** menu.

Tip: Backup files are always named according to the following format: "emxxyyzz.ezb" where "xxyyzz" is the month, day and year the backup file was created.

Backing up to a CD: USB memory sticks "(jump" drives) are usually the easiest way to back up your data. As of this writing, Windows does not yet natively allow programs to write information directly to a CD-R or CD-RW. If you try to back up directly to a CD you will encounter an error (usually Error 52) and the backup process will be terminated. If you want to store your backup files on a CD-R or CD-RW, select a **Backup Folder** on your computer's hard drive for the backup operation. Then use the CD-writing software that came with your CD drive to copy the backup file onto the CD.

8.1.5 Restore

This option displays the **Data Restore** window allowing you to reset your business records to a specific date and time using a backup file generated by the program. Restoring data with this function *completely overwrites all entries in the program*.



Since the restore files are only current up to the date of your last backup, ***the restoring process results in the loss of all records entered since your last backup. If in doubt, perform a new backup prior to restoring your data, to ensure that your current state can be resumed if necessary.***

To reset your business records using an Consultant Front Office backup file, just do this:

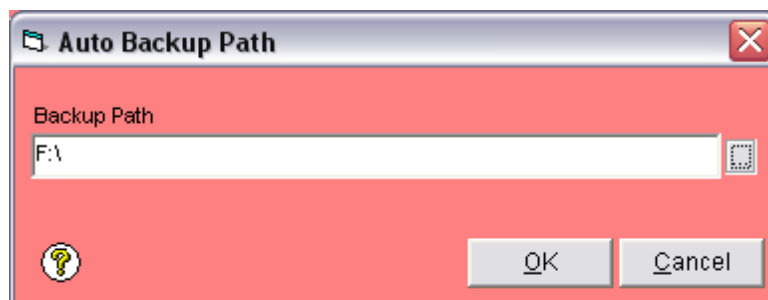
1. Click on the ellipsis (...) button and select the backup file you wish to restore data from. Backup files from some older versions of the program have a "zip" extension. To locate these files make sure you select the "Version 3, 4, 5 (*.zip)" option from the **Files of Type** selection box in the **Open** window after clicking on the ellipsis.
2. Check or uncheck the **Restore email and letters** checkbox.
3. Check or uncheck the **Restore program settings** checkbox. In general you will want to select this option when restoring your data.
4. Click on **Restore** to finish the restoring process.
5. Click on **OK** when the program informs you that the data has been successfully restored.

8.1.6 Verify Backup

This option allows you to test a backup file created by the program to make sure that the file will be usable to restore your data. The program verifies the integrity of backup files when they are created but it's highly recommended that you use this function to retest backup files prior to repairing your computer or reformatting your computer's hard drive.

8.1.7 Auto Backup Path

This option allows you to specify a path for the program to automatically back up your data to the first time the program is opened each day.



*This path should not be on the same hard drive where the program is installed. If you have more than one physical hard drive set the path to a location on the second drive. If you do not have a second hard drive, we recommend that you purchase an external hard drive or a USB memory stick and set the **Auto Backup Path** option to a location on either of those devices.*

Since a new auto backup file will be created each day when the program is first opened, you may occasionally have to delete some of the older backup files to make room for newer ones. Consultant Front Office [backup files](#) are named based on the date they get created so it's easy to tell which files are the oldest just by looking at the files on the stick.

8.1.8 Import - Contacts

This option allows you to import contact information from any comma-delimited (.txt / .csv) or tab-delimited (.tab) file. All imported listings are automatically affiliated with the business you currently have open and are assigned to the **Import** group for easy identification. For additional information on importing please see [Importing Contacts](#) .

8.1.9 Import - Schedules

This option allows you to import activity schedules that have been created in and exported from the program. Exporting and importing schedules is a great way for teams to share their customer follow-up and host coaching processes. Importing schedules gives you an exact copy of the schedule as it existed on the machine where it was exported, including any emails that may be included in it.

Schedule importing can be initiated by:

- "Opening" or "running" a schedule export file (.ezs) from the Internet
- Double clicking on a schedule export file (.ezs)
- Using the **Browse** button in the **Import Schedules** window to locate a schedule export file (.ezs)

Any of these operations will open the **Import Schedules** window and enter the path to the selected file in the **Import Path** entry box. To finish, just select the schedules you would like to import and click on **Import**.

If the **Import** button is not highlighted then either the path is not valid or you have not selected any schedules for importing. If the path is not valid it will be shown in red instead of in black.

8.1.10 Import - Content

This option allows you to import emails, letters and schedules packaged together according to the specifications contained in our "Data Exchange Interface User Guide". Importing content into the program gives you instant access to a wide variety of marketing and follow-up materials. Content packages are available for purchase. They can also be created by the company you distribute products for. Having your company prepare a content package for the program allows them to specify recommended procedures for activities such as customer follow-up, host coaching and new recruit training, while simultaneously equipping you with polished, ready-to-go marketing materials.

Content package importing can be initiated by:

- "Opening" a content bundle file (.ezp) from the Internet
- Double clicking on a content bundle file (.ezp)
- Using the **Browse** button in the **Import Content** window to locate a content bundle file (.ezp)
- Using the **Import** option on the **File** menu in the **Email** window.

Any of these operations will open the **Import Content** window and enter the path to the selected file in the box provided. To finish, just click on **OK**.

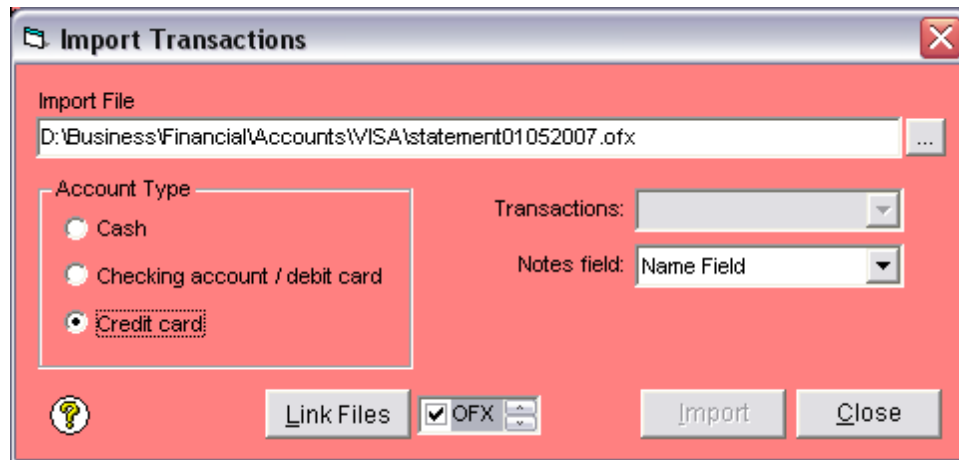
If the **OK** button is not highlighted then the path is not valid. Use the ellipsis (...) button at the end of the box to browse and locate a valid content (.ezp) file.

8.1.11 Import - Transactions

This option allows you to import checking and credit card statements into the program using the QIF, OFX or QFX format. Importing transactions is actually done via the **Income / Expenses** screen, so clicking on this menu option will take you to that screen if you're not already there. Clicking on this option is otherwise exactly the same as clicking on the **Import** button on the **Income / Expenses** screen.

Importing transactions allows you to tie your business expenses to a dedicated checking and / or credit card account and then import them all in a matter of minutes each month. To import expenses from a QIF, OFX or QFX file just do this:

1. Click on the **Import – Transactions** option on the **File** menu or on the **Import** button on the **Income / Expenses** screen to display the **Import Transactions** window.



2. Enter a path or browse to the file containing the information to be imported.
3. Select the appropriate account type (Checking account / debit card or Credit card).
4. If the **Transactions** box is highlighted select the range of entries in the import file that you would like to import (this box will only be highlighted if the import file contains more than 150 entries).
5. Leave the **Notes field** box as it is for now. Some import files will have descriptive information in more than one field for each transaction. The **Notes field** selection box allows you to select different descriptive fields from the import file to be entered into the **Notes** box on the **Expenses** screen.
6. Click on **Import** to enter the information from the import file on the **Income / Expenses** screen in the program. If the entry in the **Notes** box on the **Income / Expenses** screen matches a previously save entry then the previously used **Category** will be automatically selected for that entry. Otherwise, the **Category** will be set to the default setting which is "**Office Expenses".

At this point in the importing process nothing has yet been actually saved. It's up to you to review the entries on the **Income / Expenses** screen, make any changes you want to make, and then click on **Save** to add the imported entries on your screen to your actual business records.

Link Files: The **Link Files** button in the **Import Transactions** window allows you to create an association between the program and various financial file types (OFX, QFX and QIF). Creating an association allows you to activate the importing function in the program, simply by double clicking or opening a financial data file.

To create (or remove) a file-type association simply select (or deselect) the file type in the selection box next to the **Link Files** button, then click on the button. Multiple file types can be selected or deselected at the same time. File types for which an association exists will be automatically selected each time the **Import Transactions** window is opened.

8.1.12 Export - Contacts

This option allows you to export contact information into a comma-delimited (.txt / .csv) file. Clicking on this menu option displays the **Save As** window, allowing you to specify a destination and filename for exporting of contact listings. Exporting automatically reflects the results of your most recent **Filter**, **Search** and **Select** operations.

8.1.13 Export - Schedules

This option allows you to export activity schedules from your program. Exporting and importing schedules is a great way for teams to share their customer follow-up and host coaching processes. Exporting schedules creates an "ezs" file containing an exact copy of the schedules as they exist on your machine, including any emails that may be included in the schedules.

To export activity schedules from the program just do this:

1. Click on the **Export – Schedules** option on the **File** menu.
2. Enter a valid **Export Path** or use the ellipsis (...) button to browse to a valid path.
3. Select the schedules you would like to export.
4. Click on **Export**.

If the **Export** button is not highlighted then either the path is not valid or you have not selected any schedules for exporting. If the path is not valid it will be shown in red instead of in black.

8.1.14 Export - Email List

This option allows you to export names and email addresses into a comma-delimited (.txt / .csv) file. Clicking on this menu option displays the **Save As** window, allowing you to specify a destination and filename for exporting of contact listings. Exporting automatically reflects the results of your most recent **Filter**, **Search** and **Select** operations.

This option differs from the **Export – Contacts** option in that it exports only email address information. Each entry in the export file contains the following information:

"First Name Last Name" <email address>

This format is ideal for uploading to online systems such as eCard, and results in recipients receiving emails addressed to them by name instead of by email address.

8.1.15 Export - iCentris

This option allows you to export contact information into a comma-delimited (.csv) file that is compatible with the iCentris importing function. Clicking on this menu option displays the **Save As** window, allowing you to specify a destination and filename for exporting of contact listings. Exporting automatically reflects the results of your most recent **Filter**, **Search** and **Select** operations.

8.1.16 Update Custom

This option displays the **Update Custom** window allowing you to specify the path for a custom update file. This feature can be used to automatically update your product information when new products are introduced or when pricing changes are made to existing products. The **Update Custom** window can also be opened by double clicking on a custom update (.ezc) file.

When the **Update** button is clicked, the program will first allow you to specify whether you would like all new products to be set as taxable. The taxability setting for each product can be changed after updating using the [Product](#) option on the **Categories** menu. Information in the custom update file will then be compared with information in the product file already on your computer.

During updating, if a product item number from the update file is not found in the product file on your computer, that product will be added to your computer's product file. If the same product item number is found in both files, pricing information from the custom update file will be used to overwrite the pricing information on your computer.

Custom update files are only available from MLM Software Solutions, Inc. If you would like to know if an updated file exists for your company please click on the **Support** option on the **Help** menu and submit a support request ticket.

8.1.17 Data Merge - Import

This option allows you to import Contact, Team, Event, Income, Expense, Sale and Purchase data from an ".ezx" file created using the [Data Merge - Export](#) option on the **File** menu. Please see [Merging Data Between Two or More Computers](#) for additional information.

8.1.18 Data Merge - Export

This option allows you to export Contact, Team, Event, Income, Expense, Sale and Purchase data into an ".ezx" file for use with [Data Merge - Import](#) option on the **File** menu. Please see [Merging Data Between Two or More Computers](#) for additional information.

8.1.19 Data Exchange - Import

This option displays the **Data Exchange Import** window allowing you to specify preferences and initiate importing of product, purchase, sale, prospect and team information, depending on which of these options have been implemented by your company.

Data Exchange Import: 05/01/2008 - 05/31/2008 (0501CB...)

☒ Update products and packages

☒ Update orders

☐ Update income

☒ Update team info for ID #

Active Product Status

☒ Change product 'Active' status based on update file

☐ Do not change product 'Active' status

Product Taxability

☐ Make all new products taxable

☐ Tax 1 ☐ Tax 2

☒ Make all new products exempt

☐ Ask me for each new product

Team Status

☐ Notify me if a team member becomes inactive

*Note: In general, you should not need to click on this menu option since opening or double clicking on a data exchange (.ezd) file will automatically open the **Data Exchange Import** window for you.*

Availability

Data exchange importing allows you to update your product, team, purchase, sale, income and prospect information using files downloaded from your company's website. This feature will only be available if the company you distribute products for has implemented the programs "Data Exchange Interface". If you would like MLM Software Solutions to contact your company regarding this capability, please send us an email at service@mlmsoftwaresolutions.com with the name and contact information of the person you would like us to contact.

ReadMe File

If your company has implemented the data exchange capability and you are able to click on the **Data Exchange - Import** menu option, then you can find company-specific instructions for importing data from your company's website using the **ReadMe File** option on the **Help** menu. Those instructions are designed to be used in conjunction with this Help topic to cover all of the steps and options available when importing data.

Importing

You will generally begin the importing process by logging into your company's website and clicking

on a link to download a file. Once you have initiated the downloading process on your company's website, here's all you need to do to import the information in the file into your program:

1. After clicking to download the file from your company's website, you will usually be presented with a choice of either saving or opening / running the file. In most cases you should be able to select **Open** or **Run** and have the program take over from there. If these options are not available or don't activate the program's data exchange window, then you will need to save the file to your Windows Desktop, click on the **Data Exchange - Import** option on the **File** menu and then locate the file you just downloaded on your Windows Desktop.
2. With the **Data Exchange Import** window now open, either by "opening" a file from your company's website or by saving it and then using the **Data Exchange - Import** option on the **File** menu to locate it, you are now ready to set your import options and import the data. You will only need to configure the **Data Exchange Import** window one time as it will remember your settings each time after that. The following is an explanation of each of the window's importing options:
 - *Update products and packages* – instructs the program to update your product listing using the data in the update (.ezd) file, by adding new products and adjusting the pricing for existing ones
 - *Update orders* - instructs the program to update your purchase history using the data in the update (.ezd) file. This process checks to make sure that a purchase has not already been imported before processing it so purchases will not be duplicated.
 - *Update income* – instructs the program to update your business income using the data in the update (.ezd) file.
 - *Update team info for ID#* - instructs the program to update your downline information using the data in the update (.ezd) file. Updating your team adds and removes members as required. Members are removed from your team by resetting their primary **Group** from **Downline** to **Inactive**. Attempting to update team information using an ezd file from another consultant (e.g. your spouse) will result in a warning intended to prevent you from inadvertently overwriting your team information with someone else's. If you are sharing business records with your spouse and wish to import his or her financial information, make sure that you *uncheck the **Update team info for ID#** checkbox* before clicking on **Update**.
 - *Change product status* – selecting the first option instructs the program to set the "Active" status of all products based on the information in the update (.ezd) file. Selecting the second option instructs the program to leave the "Active" status of products which are already in your product listing unchanged.
 - *Product Taxability* - instructs the program as to how to handle the taxability setting for products that are added during the update process. Selecting the third option allows you to set taxability individually for each new product. Taxability settings can also be easily adjusted once updating is complete using the **Product** option on the **Categories** menu.
 - *Notify me if a team member becomes inactive* - instructs the program to prompt you each time a downline member is switched over to the **Inactive** primary **Group** category.

Selecting Sales and Purchases to Import

If the download file contains product sales, you will be presented with a window entitled **Select Sales For Importing**. This window lists all of the sales in the download file for which there is no "perfect

match" in your program. If your program contains a possible match (same amount and approximately the same date), then information for that matching order will be displayed adjacent to the import order. A column will be displayed at the right of this window allowing you to select an Event to link each imported sale to. If the download file contains Event information this information will be selected automatically. You will also be able to select a payment method for each order that you are responsible for collecting payment on. At the far right of each line in this window is an "Import" checkbox that is unchecked by default. To import an order, check the box. To skip an order, leave the box unchecked. There's an "All" button at the top of the "Import" column that allows you to quickly select all of the listed orders. This button changes to "None" after being clicked allowing you to de-select all listed orders.

Select Sales For Importing

Below is a list of sales in the import file along with possible matches that are already in your program. To import a sale, first select the Event it's associated with (if any), then check the 'Import' box at the end of the row. To skip a sale leave the 'Import' box unchecked.

SALES BEING IMPORTED				POSSIBLE MATCHES IN YOUR PROGRAM				IMPORT OPTIONS				None
Date	Invoice	Client	Amount	Date	Invoice	Client	Amount	Event	Method	Check #	Import?	
09/02/08	9342059	vMne, Holly	49.94					100001	Check	111	☒	
09/02/08	9342332	Susan Sanders, Holtz Chr	57.66					100001	Cash		☒	
09/02/08	9342333	Patli Holtz, Holtz Chiroprac	132.05					100001	Cash		☒	
09/02/08	9344992	Haverstock, Lori	42.95					100001	Credit		☒	
09/02/08	9344993	Reigart, Leona	37.96					100001	Credit		☒	
09/02/08	9344994	Renoll, Nancy	46.43					100001	Check	222	☒	
09/02/08	9344995	Becker, Darlene	40.95					100001	Cash		☒	
09/02/08	9344996	Henry, Connie	26.97					100001	Cash		☒	
09/07/08	9371761	Smith, Dawne	87.35					100002	Credit		☒	
09/07/08	9376877	Grubb, Jean	27.47					100002	Credit		☒	
09/07/08	9376878	Null, Sherry	27.96					100002	Check	333	☒	
09/07/08	9376879	Brady, April	58.98					100002			☒	
09/22/08	9457694	Miller, Heather	68.21					(None)			☒	

OK Cancel

If the download file contains information about product purchases, you will also be presented with a window entitled **Select Purchases For Importing**. This window behaves exactly the same as the window for selecting sales described immediately above. If you selected Event information for an order in the previous window and there's a matching order in this window, the Event information will be selected automatically.

8.1.20 Data Exchange - Summary

This options displays the results of your last Data Exchange import operation. Data Exchange Summaries are overwritten each time you perform a new import operation so you will need to save a summary manually if you would like to have it to refer to in the future.

8.1.21 Delete - Business

This option allows you to delete the currently active business. ***Since deleting a business completely eliminates the associated data files from your hard drive, it's strongly recommended that you first back up these data files using the [Backup](#) option on the File menu.*** Consultant Front Office will prompt you to perform a backup prior to executing the **Delete** -

Business request.

8.1.22 Delete - Contacts

This option allows you to delete all listings currently stored in your **Contacts** database. ***Since deleting these listings completely eliminates the associated data files from your hard drive, it's strongly recommended that you first back up these data files using the [Backup](#) option on the File menu.*** Consultant Front Office will prompt you to perform a backup prior to executing the **Delete - Contacts** request.

8.1.23 Delete - Calendar

This option allows you to selectively delete from your Calendar all non-recurring appointments prior to a specified date. Using this feature to clean out old appointments will improve program performance and shorten the time it takes to synchronize with a Palm handheld organizer.

Checking the "Include Recurring Appointments" checkbox causes the program to delete all instances of recurring appointments that occur prior to the specified date. Instances of recurring appointments that fall on or after the specified date will not be deleted.

Since deleting appointments complete eliminates the associated data from your hard drive, it's strongly recommended that you first back up your data using the [Backup](#) option on the File menu. Consultant Front Office will prompt you to perform a backup prior to executing the **Delete - Calendar** request.

8.1.24 Delete - Memos

This option allows you to delete all of your **Memos**. ***Since deleting these records completely eliminates the associated data files from your hard drive, it is strongly recommended that you first back up these data files using the [Backup](#) option on the File menu.*** Consultant Front Office will prompt you to perform a backup prior to executing the **Delete - Memos** request.

8.1.25 Delete - Tasks

This option allows you to delete all of your **Tasks** list entries. ***Since deleting these entries completely eliminates the associated data files from your hard drive, it's strongly recommended that you first back up these data files using the [Backup](#) option on the File menu.*** Consultant Front Office will prompt you to perform a backup prior to executing the **Delete - Tasks** request.

8.1.26 Archive Data

This option allows you to *permanently remove financial records* from the program to make room for new records. In general, archiving should only be done if the program notifies you that you have reached the maximum number of records that the program is able to hold (approximately 32000 of any one type).

Archiving should only be done once you have printed any reports you may need for business or tax purposes that depend on some or all of the data to be archived. Archived data is stored in a normal backup file that can be restored if necessary, however, *there is no way to merge archived data back*

into your current database.

To archive data up through a specific date just do this:

1. Click on the **Archive Data** option on the **File** menu.
2. Create a backup of your data when prompted to do so by the program.
3. Click **OK** in the **Archive Data** window.
4. Select an archive date from the pop-up calendar (this is the date through which all of your financial records will be deleted, e.g. selecting 12/31/05 will delete all income, expense, sales and purchase records through 12/31/05).
5. Enter or browse to a path where the archive backup file will be saved, using the **Archive Destination** window.
6. Click on **Yes** in the **Begin Archiving** window.

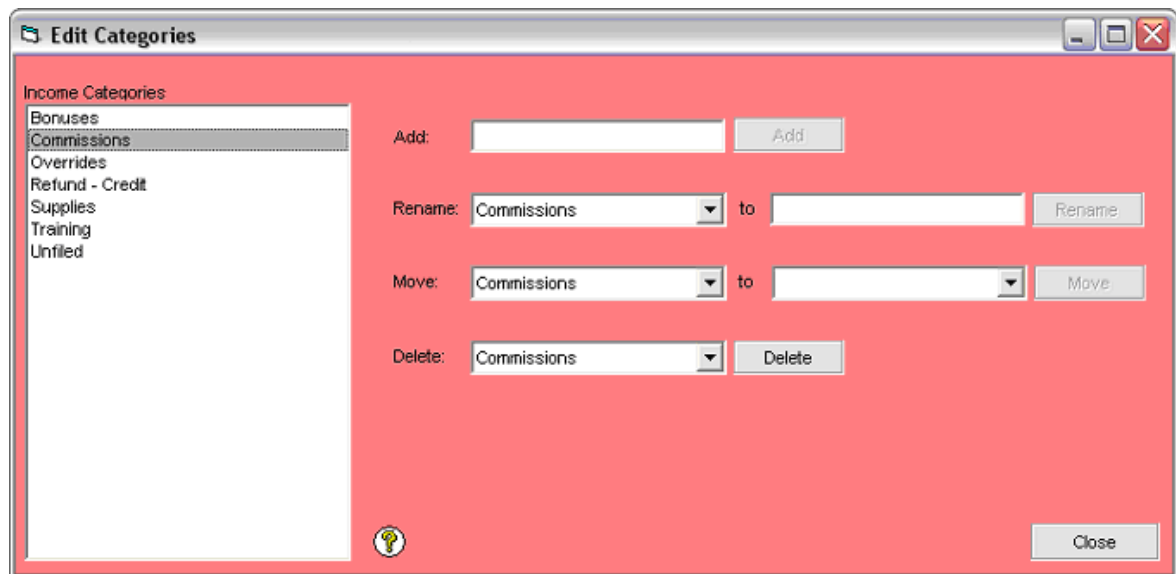
While archiving permanently removes financial records including your customer sales records, a copy of these records is retained so that you can still view a customer's purchase history using the **Purchase History** icon next to the **Last Order** box on the **Contacts** screen, however, all other reports and report filters will be unable to see these records. A record of all events each contact has attended is also still viewable after archiving using the **Event History** icon next to the **Last Event** boxes on the **Contacts** screen.

8.1.27 Exit

Ends the program. Since Consultant Front Office continuously saves new entries and changes to existing entries as they're made, there's no need to save before exiting.

8.2 Categories

8.2.1 Income



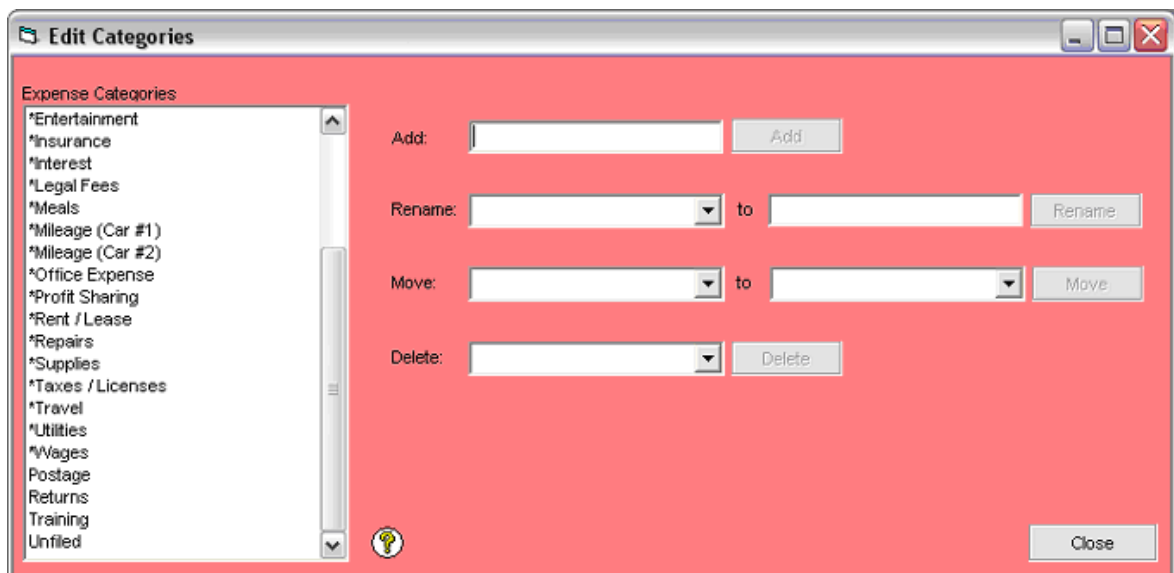
This option displays the **Edit Categories** window, allowing you make changes to your list of categories and to records you have saved using those categories. Here is a brief description of the

options available in this window:

- **Add:** Allows you to add new Income categories.
- **Rename:** Allows you to rename existing categories and have all of the records associated with those categories changed to the new name.
- **Move:** Allows you to move records from one Income category to another.
- **Delete:** Allows you to delete an existing Income category. Any records that use the deleted category will be moved into the "Unfiled" category. If you would like these records in a different category it's usually best to change them over to the new category first, using the **Move** function, so that they don't end up in "Unfiled" when the original category is deleted.

Note: Not all Income categories can be renamed and deleted. If a category does not show up in the selection box for either of these two functions then it is a protected category that the program requires in order to function properly.

8.2.2 Expenses



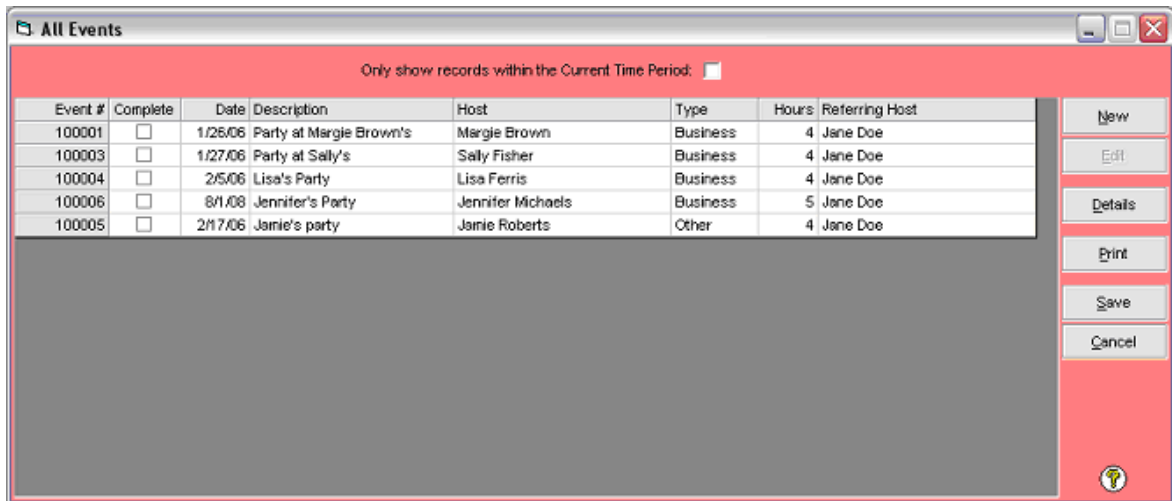
This option displays the **Edit Categories** window, allowing you make changes to your list of categories and to records you have saved using those categories. Here is a brief description of the options available in this window:

- **Add:** Allows you to add new Expense categories.
- **Rename:** Allows you to rename existing categories and have all of the records associated with those categories changed to the new name.
- **Move:** Allows you to move records from one Expense category to another.
- **Delete:** Allows you to delete an existing Expense category. Any records that use the deleted category will be moved into the "Unfiled" category. If you would like these records in a different category it's usually best to change them over to the new category first, using the **Move** function, so that they don't end up in "Unfiled" when the original category is deleted.

8.2.3 Products

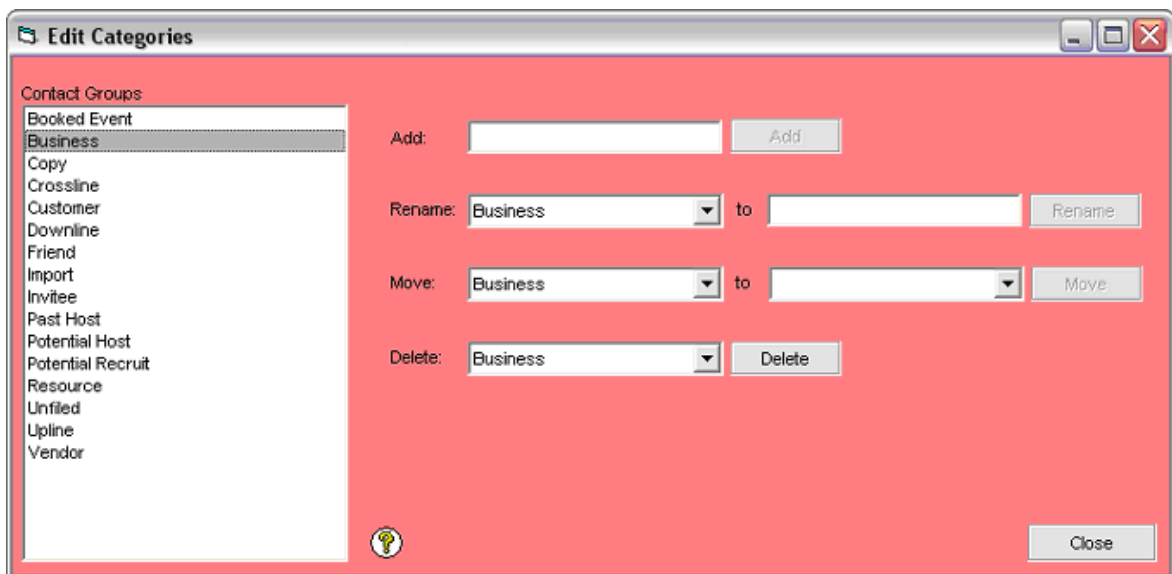
This option displays the **Products** window, allowing you to add new products and to edit or delete existing ones.

8.2.4 Events



This option displays the [Events](#) window allowing you to add new events and to edit or delete existing ones. Events added using this feature can be selected in the **Event** boxes on the main financial screens and in numerous other locations throughout the program.

8.2.5 Contacts



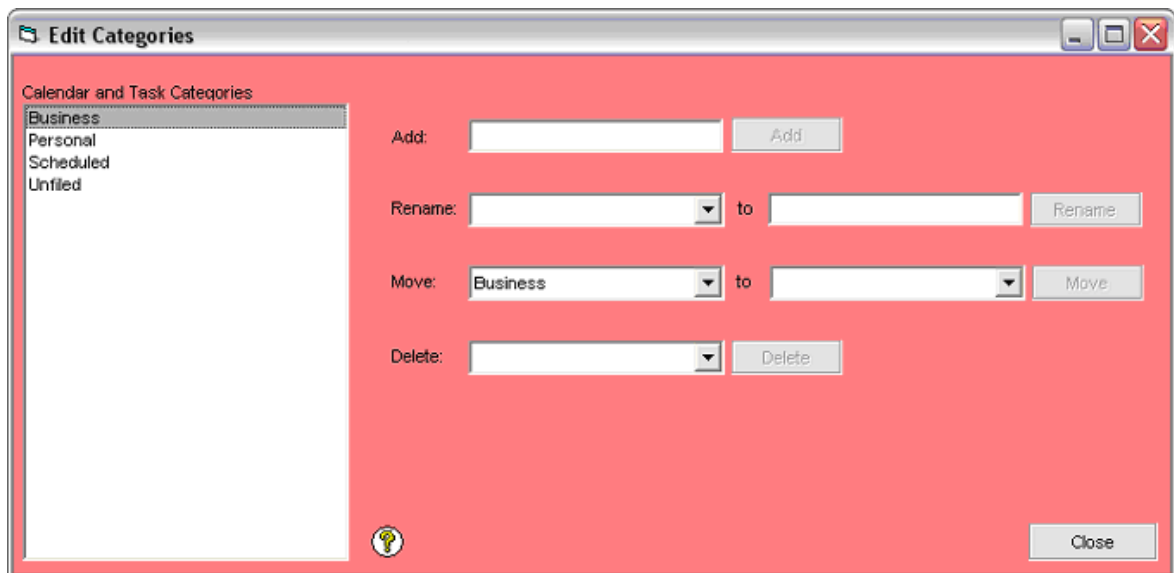
This option displays the **Edit Categories** window, allowing you make changes to your list of categories and to records you have saved using those categories. Here is a brief description of the options available in this window:

- **Add:** Allows you to add new Contact groups
- **Rename:** Allows you to rename existing groups and have all of the records associated with those groups changed to the new name.

- **Move:** Allows you to move records from one Contact group to another.
- **Delete:** Allows you to delete an existing Contact group. Any contacts in that group will be moved into the "Unfiled" group. If you would like these contacts in a different group it's usually best to change them over to the new group first, using the **Move** function, so that they don't end up in "Unfiled" when the original group is deleted.

Note: Not all Contact groups can be renamed and deleted. If a group does not show up in the selection box for either of these two functions then it is a protected group that the program requires in order to function properly.

8.2.6 Calendar / Tasks



This option displays the **Edit Categories** window, allowing you make changes to your list of categories and to records you have saved using those categories. Here is a brief description of the options available in this window:

- **Add:** Allows you to add new Calendar / Task categories.
- **Rename:** Allows you to rename existing categories and have all of the records associated with those categories changed to the new name.
- **Move:** Allows you to move records from one Calendar / Task category to another.
- **Delete:** Allows you to delete an existing Calendar / Task category. Any records that use the deleted category will be moved into the "Unfiled" category. If you would like these records in a different category it's usually best to change them over to the new category first, using the **Move** function, so that they don't end up in "Unfiled" when the original category is deleted.

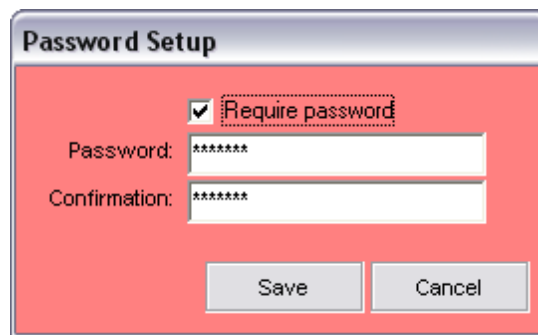
Note: Not all Calendar / Task categories can be renamed and deleted. If a category does not show up in the selection box for either of these two functions then it is a protected category that the program requires in order to function properly.

8.2.7 Memos

This option displays the **Memo Categories** window, and prompts you to enter a new Memo category to be saved, or select an existing one to be deleted. Memo categories appear in the [Filter](#) box in the **Memos** window..

8.3 Settings

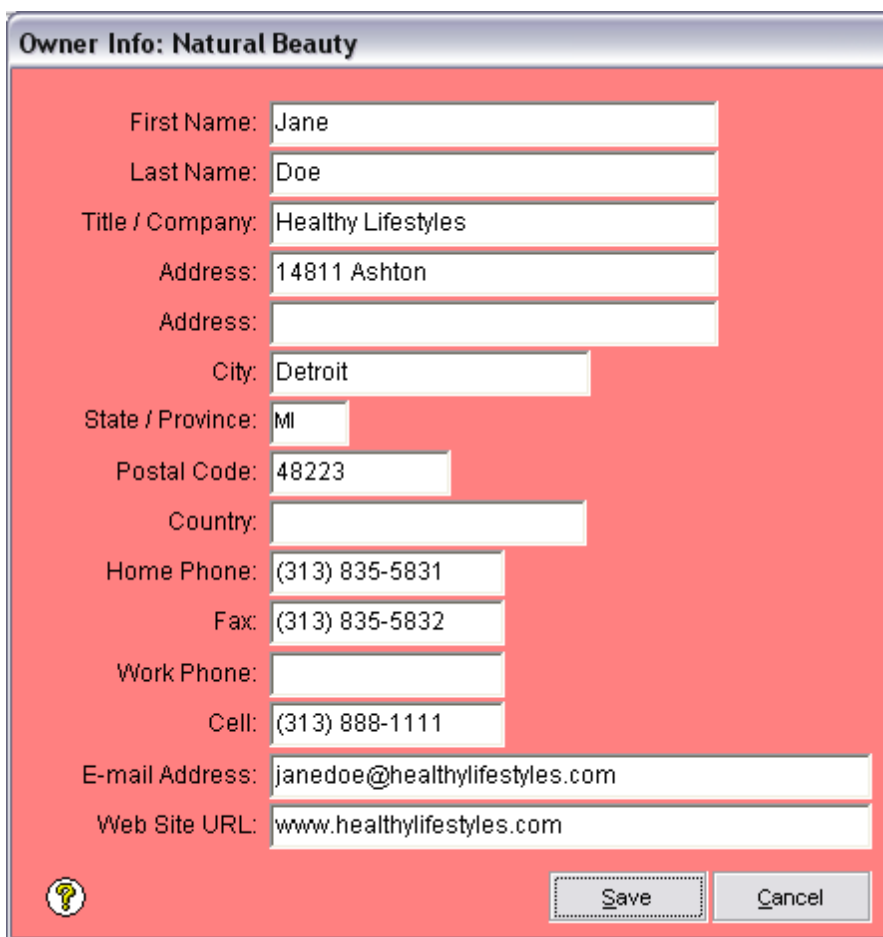
8.3.1 Password

A screenshot of a 'Password Setup' dialog box. The dialog has a title bar with the text 'Password Setup'. Inside, there is a checkbox labeled 'Require password' which is checked. Below this, there are two text input fields. The first is labeled 'Password:' and contains seven asterisks. The second is labeled 'Confirmation:' and also contains seven asterisks. At the bottom of the dialog, there are two buttons: 'Save' and 'Cancel'.

This option displays the **Password** setup window, where you can specify whether or not the program should be password protected and what password to use.

8.3.2 Owner Information

This option displays the **Owner Information** window allowing you to view and edit your personal information, which is used for some reports and when creating invoices.



The image shows a software window titled "Owner Info: Natural Beauty". It contains a series of text input fields for personal and business information. The fields are labeled as follows: First Name, Last Name, Title / Company, Address (two lines), City, State / Province, Postal Code, Country, Home Phone, Fax, Work Phone, Cell, E-mail Address, and Web Site URL. Each field has a corresponding text entry. At the bottom left is a help icon (a question mark in a circle). At the bottom right are two buttons: "Save" and "Cancel".

First Name:	Jane
Last Name:	Doe
Title / Company:	Healthy Lifestyles
Address:	14811 Ashton
Address:	
City:	Detroit
State / Province:	MI
Postal Code:	48223
Country:	
Home Phone:	(313) 835-5831
Fax:	(313) 835-5832
Work Phone:	
Cell:	(313) 888-1111
E-mail Address:	janedoe@healthylifestyles.com
Web Site URL:	www.healthylifestyles.com

The company name you enter in this window should be your own personal company name, if you have one. You can also use the **Title / Company** field to enter "Independent Consultant" or some other title that you would like to have appear on your invoices. To specify which entries from the **Owner Information** window are included on your invoices, click on the **Invoices** button on the **Sales** screen, then click on [Settings](#).

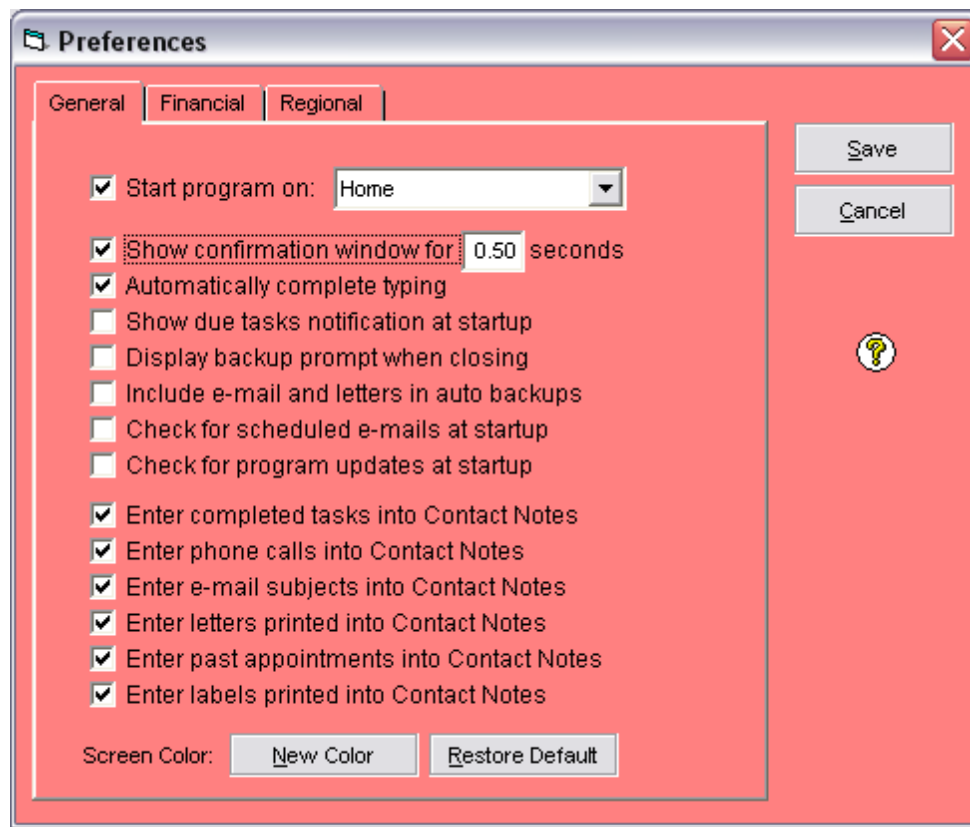
The name you enter in the **Owner Information** window is also the name that will be assigned to the topmost member in the team views and reports.

Each active business has its own, unique **Owner Information**.

8.3.3 Preferences

This option displays the **Preferences** window allowing you to activate optional program features as described below.

General

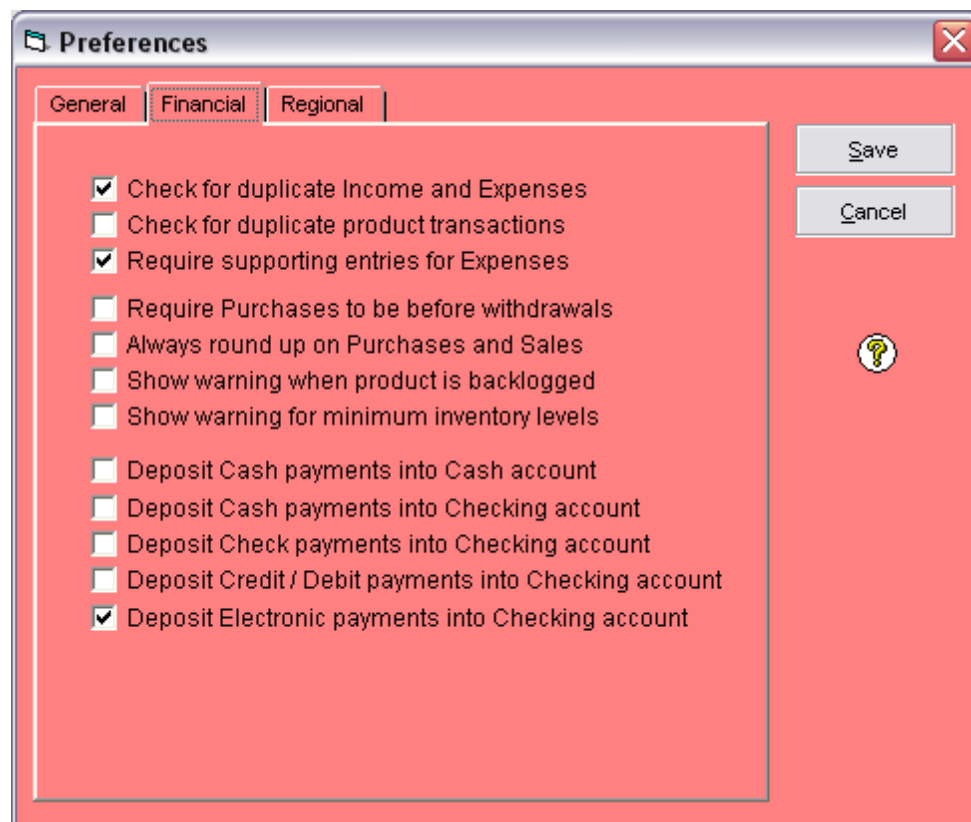


1. *Start program on _____* - allows you to specify which main screen the program should go to at startup.
2. *Show confirmation window for _____ seconds* – causes the program to display a window for the specified amount of time confirming when transactions are recorded.
3. *Automatically complete typing* - causes the program to anticipate keyboard entries based on previous input.
4. *Show Tasks list notification at startup* – causes the program to display a pop-up notice at startup if you have Tasks tasks that are due
5. *Display backup prompt when closing* – causes the program to ask you if you want to back up your data every time the program is closed.
6. *Include email and letters in auto backups* – causes the program to include all of your saved and sent emails when performing an auto backup at program startup
7. *Check for scheduled emails* – causes the program to check its list of scheduled emails at program startup and send any that have come due
8. *Check for program updates at Startup* – causes the program to automatically check for program updates each time it is started
9. *Enter completed tasks in Contact Notes* – causes the program to enter Task descriptions into a contact's Notes field whenever a task involving that contact is marked as completed.
10. *Enter phone calls in Contact Notes* – causes the program to enter the current date and the phone number dialed into a contact's Notes whenever you use the Auto Dialer to dial a contact's phone number.
11. *Enter email subject in Contact Notes* – causes the program to enter the email Subject into a contact's Notes whenever you send an email to a recipient selected using the Contacts button in the Email window.
12. *Enter letters printed into Contact Notes* – causes the program to enter the current date and "Letter printed" into a contact's Notes whenever you print a letter with that contact selected using

the **Select Recipients** option on the **File** menu in the **Letters** window.

13. *Enter appointments in Contact Notes* – causes the program to enter the Appointment messages into a contact's Notes whenever an appointment involving that contact has been completed.
14. *Enter labels in Contact Notes* – causes the program to enter "Label printed" into a contact's Notes whenever a label is printed for that contact.
15. *Screen Color* - allows you to change the background color of the program's primary screens.

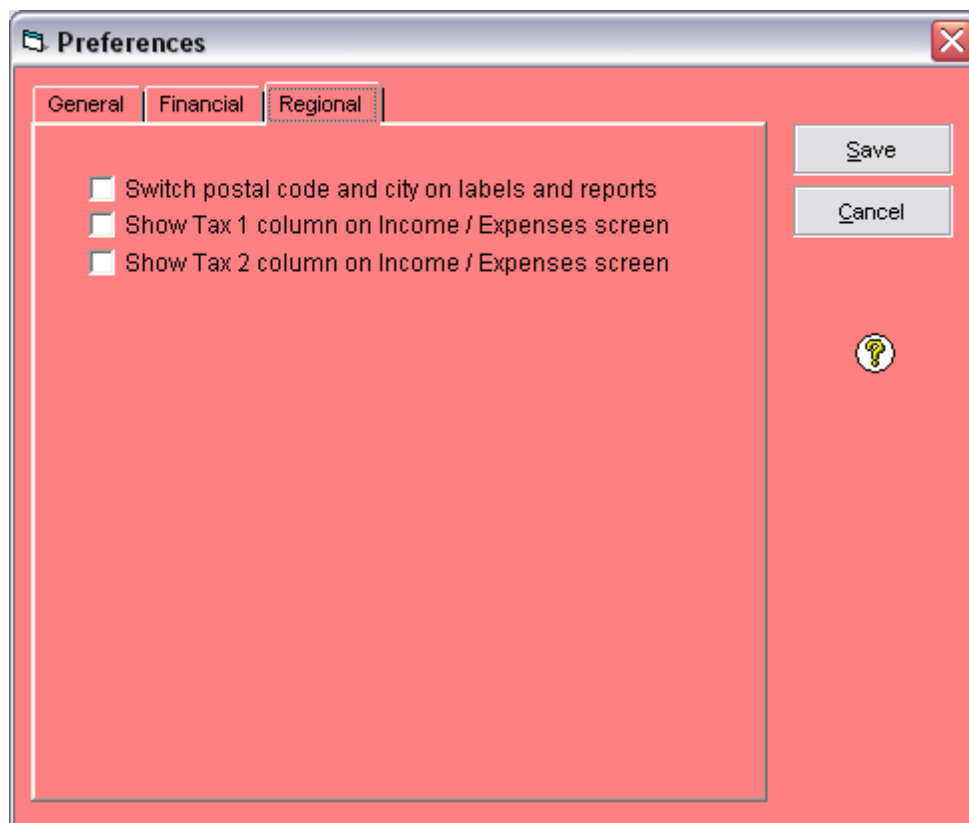
Financial



1. *Check for duplicate Income and Expenses* - causes the program to warn you if an Income or Expense transaction you're entering has already been recorded.
2. *Check for duplicate product transactions* – causes the program to warn you if a Purchase, Sale, Sample, Personal Use, Loan or Trade transaction you're entering has already been recorded.
3. *Require supporting entries for Expenses* - forces you to enter supporting information for Travel, Meals, Entertainment and Mileage expenses. If you already keep good written records indicating the people, place and purpose associated with these deductions, you may be able to un-check this box, to avoid having to re-enter the information when you record the deduction for financial purposes.
4. *Require purchases to be before withdrawals* - causes the program to ensure that inventory is not withdrawn before the date it was purchased. Un-checking this option simplifies inventory management and does not compromise financial accuracy.
5. *Always round up on purchases and sales* – causes the program to always round discount, tax and freight values up on these two screens, instead of rounding up or down based on a midpoint. Try selecting this option if your percentage discount, or automatically entered tax or freight values, are

- sometimes 0.01 less than shown on your purchase receipt.
6. *Show warning when product is backlogged* - causes a message box to be displayed anytime you record a product withdrawal for which there is insufficient inventory.
 7. *Show warning for minimum inventory levels* - causes a message box to be displayed anytime you record a product withdrawal that causes the inventory level of one or more products to fall below your specified minimum level. A "minimum level" warning will not be displayed if a "backlog" notice has already been shown. If the withdrawal transaction results in a product being backlogged and if the option to "Show warning when product is backlogged" is selected, the program will
 8. *Deposit Cash payments into Cash account* - causes the program to automatically deposit all payments you receive via cash (Income and Sales), into your Cash account.
 9. *Deposit Cash payments into Checking account* - causes the program to automatically deposit all payments you receive via cash (Income and Sales), into your Checking account.
 10. *Deposit Check payments into Checking account* - causes the program to automatically deposit all payments you receive via check (Income and Sales), into your Checking account.
 11. *Deposit Credit / Debit payments into Checking account* - causes the program to automatically deposit all payments you receive via credit or debit card (Income and Sales), into your Checking account.
 12. *Deposit Electronic payments into Checking account* - causes the program to automatically deposit all payments you receive electronically (Income and Sales) into your Checking account.

Regional



1. *Switch postal code and city in labels and reports* - reverses the printed positions of the City and Zip fields, and eliminates the State field, in labels and address book reports.

2. *Show Tax 1 column on Income and Expenses screens* - instructs the program to display a column for entering tax on the **Income / Expenses** screen. Tax entered in this manner will be included in the **Sales Tax Summary** report for the first tax rate entered into the program. This option will only be available if you have previously indicated that your state, province or country charges sales tax using the **Settings** button on the **Edit Sales** or **Edit Purchases** (full-inventory edition) screen.
3. *Show Tax 2 column on Income and Expenses screens* - instructs the program to display a column for entering tax on the **Income** and **Expenses** screens. Tax recorded in this manner will be included in the **Sales Tax Summary** report for the second tax rate entered into the program. This option will only be available if you have previously indicated that your state, province or country charges sales tax using the **Settings** button on the **Edit Sales** or **Edit Purchases** (full-inventory edition) screen.

8.4 Accounts

8.4.1 Cash

Only show records within the Current Time Period: ☐

Date	Invoice	Description	Amount	Balance	Status
1/20/99	1000		\$176.53	\$176.53	
1/25/99	1001		\$89.52	\$266.05	
2/1/99	1002		\$176.53	\$442.58	
2/20/99	1003		\$263.55	\$706.13	
3/15/99	1004		\$88.95	\$795.08	
7/28/99	1005		\$68.74	\$863.82	

Search

By PO / Invoice: ☐

By Description: ☐

By Amount: ☐

Find Next

Adjust

Reconcile

Print

Close

This option displays the **Cash** account register window showing all payments you made and received in cash. The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#) depending on the status of the checkbox at the top of the window.

This register also includes **Cash** payments you received that were entered with the "Deposit Cash payments into Cash account" auto-deposit option selected in the [Preferences](#) window..

8.4.2 Checking

Checking

Only show records within the Current Time Period: ☐

Date	Method	Check No.	Invoice	Description	Amount	Balance	Status
2/6/00	Check	101		*Office Expe	(\$25.00)	(\$25.00)	
1/1/06	Check	102		*Office Expe	(\$9.95)	(\$34.95)	C
1/5/06	Check	103		*Advertising	(\$14.95)	(\$49.90)	C
1/11/06	Check	104		*Supplies	(\$13.25)	(\$63.15)	C
1/23/06	Check	105		*Office Expe	(\$4.95)	(\$68.10)	C

Search

By Check #: ☐

By Invoice: ☐

By Description: ☐

By Amount: ☐

Adjust

Reconcile

Print

Close

?

This option displays the **Checking** account register window showing all payments you made and received through your checking account. The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#) depending on the status of the checkbox at the top of the window.

This register also includes **Cash, Check, Credit** and / or **Electronic** payments you received that were entered with their respective auto-deposit options selected in the [Preferences](#) window..

8.4.3 Credit Card

Credit

Only show records within the Current Time Period: ☐

Date	Invoice	Description	Amount	Balance	Status
1/30/00		Training Fees	(\$50.00)	(\$50.00)	
2/3/00		*Office Expe	(\$35.00)	(\$85.00)	
1/15/05	890987	Inc., BelleJou	(\$252.94)	(\$337.94)	
2/2/05	101987	Inc., BelleJou	(\$266.25)	(\$604.19)	
2/15/05	921098	Inc., BelleJou	(\$365.81)	(\$970.00)	
4/15/05	100126	Inc., BelleJou	(\$321.55)	(\$1,291.55)	
5/31/05	800027	Inc., BelleJou	(\$208.68)	(\$1,500.23)	
6/15/05	100018	Inc., BelleJou	(\$321.55)	(\$1,821.78)	
1/1/06		*Office Expe	(\$4.95)	(\$1,826.73)	

Search

By PO: ☐

By Description: ☐

By Amount: ☐

Find Next

Adjust

Reconcile

Print

Close

?

This option displays the **Credit** account register window showing all payments you made and received using credit. The display can show all entries regardless of when they were entered or it can be limited to the **Current Time Period** depending on the status of the checkbox at the top of the window.

8.5 Samples

8.5.1 Summary

This option displays the **Sample Summary** window showing the quantity and value of products used for promotional use. In the Basic, Standard and Professional editions, the value shown will be the retail value of the products since the program does not know what you actually paid for each product. In the "full-inventory" edition, the value will be your actual cost as recorded on the **Purchases** screen.

	Item #	Description	Qty	Retail
1	101	Astoria Body Wrap	2.00	38.00
2	102	Astoria Facial Creme	1.00	19.00
3	103	Better Health Day Pack	2.00	77.00

Totals: 5.00 \$134.00

The display can show all entries regardless of when they were entered or it can be limited to the **Current Time Period** depending on the status of the checkbox at the top of the window.

8.5.2 Edit

This option displays the **Edit Samples** window showing an historical account of all samples transactions.

Only show records within the Current Time Period: ☐

	Date	Item #	Product	Qty	Retail	Notes
1	4/5/05	101	Astoria Body Wrap	1.0	19.00	
2	4/5/05	102	Astoria Facial Creme	1.0	19.00	
3	4/5/05	103	Better Health Day Pack	1.0	38.50	
4	7/28/05	101	Astoria Body Wrap	1.0	19.00	Bobbi Jacobson
5	2/24/06	103	Better Health Day Pack	1.0	38.50	Party sample

Search:

By Product: ☐

By Qty: ☐

By Value: ☐

By Notes: ☐

The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#) depending on the status of the checkbox at the top of the window. Clicking on any entry, or on the numbered button at the start of each row, displays the **Edit** window allowing you to modify or delete the selected record.

8.5.3 Withdrawals

This option displays the **Samples** window allowing you to create a record of product(s) used for a promotional purpose.

Date: 7/11/08

Event: 100006 Jennifer's Party

	Group	Item #	Description	Qty	Purpose (required)
1	Skin Care	102	Astoria Facial Creme	1.0	
2	Supplements	103	Better Health Day Pack	1.0	
3					
4					
5					
6					

To record a **Samples** record, just do the following:

- .2. Click on the button at the right side of the **Date** box and select the date you used the product(s). Dates can also be entered by typing directly into the box or using the **Up** and **Down** arrow keys or the **PgUp** and **PgDn** keys to scroll one day or one week at a time respectively.
- .3. If the **Sample** occurred in connection with an [Event](#), select the **Event** using the **Event**

selection boxes or using the ellipsis (...) button to the right of the **Event** selection boxes. The withdrawal will then be included in the **Event Summary** report on the **Reports** screen. New events can be added using the ellipsis (...) button to the right of the **Event** selection boxes.

- .4. Select the product(s) you used by **Item #** or **Description** and adjust the quantity, then click on **Save** to save the transaction.

*Unlike personal use, the value of product(s) withdrawn for sample purposes is included in the Cost of Goods Sold and hence is **allowed as a deduction against income**.*

Full-Inventory Edition: Sample withdrawals are automatically removed from your existing inventory. Withdrawals that are placed on backlog due to insufficient inventory will show a zero (0.00) **Value** until the backlog is filled by a subsequent purchase.

8.6 Personal Use

8.6.1 Summary

This option displays the **Personal Use Summary** window showing the quantity and value of products withdrawn for personal use purposes.

	Item #	Description	Qty	Retail
1	101	Astoria Body Wrap	1.00	19.00
2	102	Astoria Facial Creme	2.00	38.00
3	103	Better Health Day Pack	1.00	38.50
Totals:			4.00	\$95.50

The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#) depending on the status of the checkbox at the top of the window.

8.6.2 Edit

This option displays the **Edit Personal Use** window showing an historical account of each personal use transaction.

Only show records within the Current Time Period: ☐

	Date	Item #	Product	Qty	Retail	Notes
1	3/15/05	101	Astoria Body Wrap	1.0	19.00	
2	3/15/05	102	Astoria Facial Creme	1.0	19.00	
3	3/15/05	103	Better Health Day Pack	1.0	38.50	
4	1/12/06	102	Astoria Facial Creme	1.0	19.00	

Search

By Product: ☐

By Qty: ☐

By Value: ☐

By Notes: ☐

The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#) depending on the status of the checkbox at the top of the window. Clicking on any entry, or on the numbered button at the start of each row, displays the **Edit** window allowing you to modify or delete the selected record.

8.6.3 Withdrawals

This option displays the **Personal Use** window allowing you to create a record of products used for your own personal use.

Date: 7/11/08 ...

Event: (None) ...

	Group	Item #	Description	Qty	Note
1	Skin Care	101	Astoria Body Wrap	1.0	
2	Supplements	105	Women's Daily Boost	1.0	
3					
4					
5					
6					

To enter a **Personal Use** record just do the following:

1. Click on the button at the right side of the **Date** box and select the date you used the product(s). Dates can also be entered by typing directly into the box or using the **Up** and **Down** arrow keys or the **PgUp** and **PgDn** keys to scroll one day or one week at a time respectively.
2. If the **Personal Use** occurred in connection with an [Event](#), select the **Event** using the **Event** selection boxes or using the ellipsis (...) button to the right of the **Event** selection boxes. The withdrawal will then be included in the **Event Summary** report on the **Reports** screen. New

- events can be added using the ellipsis (...) button to the right of the **Event** selection boxes.
3. Select the product(s) you used by **Item #** or **Description** and adjust the quantity, then click on **Save** to save the transaction.

*Unlike promotional samples, the cost of product withdrawn for personal use is not included in the Cost of Goods Sold and hence is **not allowed as a deduction against income**. Personal Use withdrawals are automatically removed from your existing inventory. Withdrawals that are placed on backlog due to insufficient inventory will show a zero (0.00) **Value** until the backlog is filled by a subsequent purchase.*

8.7 Loans

8.7.1 Summary

This option displays the **Loans** summary window showing the quantity and value of products used for loan purposes. In the Basic, Standard and Professional editions, the value shown will be the retail value of the products since the program does not know what you actually paid for each product. In the "full-inventory" edition, the value will be your actual cost as recorded on the **Purchases** screen.

	Item #	Description	Qty	Retail
1	101	Astoria Body Wrap	-1.00	-19.00
2	102	Astoria Facial Creme	0.00	0.00
3	103	Better Health Day Pack	0.00	0.00

Totals: -1.00 \$210.00

The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#), depending on the status of the "Only show records within the Current Time Period" checkbox at the top of the window.

8.7.2 Edit

This option displays the **Edit Loans** window showing an historical account of all **Borrow** and **Loan** transactions.

Edit Loans

Only show records within the Current Time Period: ☐

	Date	Item #	Product	Qty	Retail	Contact	
1	2/6/00	101	Astoria Body Wrap	1.0	19.00		☐
2	1/2/04	101	Astoria Body Wrap	1.0	19.00		☐
3	1/2/04	102	Astoria Facial Creme	1.0	19.00		☐
4	1/2/04	103	Better Health Day Pack	1.0	38.50		☐
5	2/9/05	101	Astoria Body Wrap	1.0	19.00		☐
6	2/9/05	102	Astoria Facial Creme	1.0	19.00		☐
7	2/9/05	103	Better Health Day Pack	1.0	38.50		☐
8	1/11/06	101	Astoria Body Wrap	1.0	19.00	Savoy, Linda	☐
9	2/6/06	101	Astoria Body Wrap	1.0	19.00	Smith, Mary	☐

Search

By Product: ☐

By Qty: ☐

By Value: ☐

By Contact: ☐

The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#), depending on the status of the "Only show records within the Current Time Period" checkbox at the top of the window.

Double clicking on any entry displays the **Edit** window allowing you to modify or delete the selected record.

8.7.3 Borrow

This option displays the **Borrowed Products** window allowing you to create a record of product(s) you borrowed from someone else.

Borrowed Products

Date: 7/20/08 ...

Contact: Masters, Claire ...

Event: (None) ...

Followup Task:

	Item #	Description	Qty	Note
1	102	Astoria Facial Creme	1.0	
2				
3				
4				
5				

To create a **Borrowed Products** record, just do the following:

1. Click on the button at the right side of the **Date** box and select the date you borrowed the product (s). Dates can also be entered by typing directly into the box or using the **Up** and **Down** arrow keys or the **PgUp** and **PgDn** keys to scroll one day or one week at a time respectively.
2. Select the contact's name from your list of contacts by clicking on the button at the right side of the **Customer** box. Names can also be selected by typing directly into the box or using the **Up** and **Down** arrow keys and the **PgUp** and **PgDn** keys to scroll one name or several names at a time respectively.
3. If the borrow occurred in connection with an **Event**, select the **Event** using the **Event** selection boxes or using the ellipsis (...) button to the right of the **Event** selection boxes. The borrow will then be included in the **Event Summary** report on the **Reports** screen.
4. The **Follow-Up Task** boxes allow you to set a follow-up task to remind you about the borrowed product. Tasks entered from this window will appear on the **Tasks** screen just as if they were entered directly on that screen.
5. Select the borrowed product(s) by **Item #** or **Description** and adjust the quantity, then click on **Record** to save the transaction.

Product that is borrowed is added to your inventory. Use the **Edit** option on the **Loans** menu to edit records that have already been recorded and to remove borrowed product(s) from inventory. *Borrowed Products are ignored for income tax purposes and have no impact on the total value of your inventory.*

8.7.4 Loans

This option displays the **Loaned Products** window allowing you to create a record of product(s) you loaned to someone else.

Edit Loans

Only show records within the Current Time Period: ☐

	Date	Item #	Product	Qty	Retail	Contact	
1	2/6/00	101	Astoria Body Wrap	1.0	19.00		☐
2	1/2/04	101	Astoria Body Wrap	1.0	19.00		☐
3	1/2/04	102	Astoria Facial Creme	1.0	19.00		☐
4	1/2/04	103	Better Health Day Pack	1.0	38.50		☐
5	2/9/05	101	Astoria Body Wrap	1.0	19.00		☐
6	2/9/05	102	Astoria Facial Creme	1.0	19.00		☐
7	2/9/05	103	Better Health Day Pack	1.0	38.50		☐
8	1/11/06	101	Astoria Body Wrap	1.0	19.00	Savoy, Linda	☐
9	2/6/06	101	Astoria Body Wrap	1.0	19.00	Smith, Mary	☐

Search

By Product: ☐

By Qty: ☐

By Value: ☐

By Contact: ☐

To create a **Loaned Products** record, just do the following:

1. Click on the button at the right side of the **Date** box and select the date you loaned the product

- (s). Dates can also be entered by typing directly into the box or using the **Up** and **Down** arrow keys or the **PgUp** and **PgDn** keys to scroll one day or one week at a time respectively.
2. Select the customer's name from your list of contacts by clicking on the button at the right side of the **Customer** box. Names can also be selected by typing directly into the box or using the **Up** and **Down** arrow keys and the **PgUp** and **PgDn** keys to scroll one name or several names at a time respectively.
 3. If the loan occurred in connection with an **Event** select the **Event** using the **Event** selection boxes or using the ellipsis (...) button to the right of the **Event** selection boxes. The loan will then be included in the **Event Summary** report on the **Reports** screen. New events can be added using the ellipsis (...) button to the right of the **Event** selection boxes.
 4. The **Follow-Up Task** boxes allow you to set a follow-up task to remind you about the product loan. Tasks entered from this window will appear on the **Tasks** screen just as if they were entered directly on that screen.
 5. Select the loaned product(s) by **Item #** or **Description** and adjust the quantity, then click on **Record** to save the transaction.

Full-Inventory Edition: Product that is loaned out is withdrawn from your inventory (or placed on backlog). Use the **Edit** option on the **Loans** menu to edit records that have already been recorded and to return loaned product(s) to inventory. *Loaned Products are ignored for income tax purposes and have no impact on your Cost of Goods Sold.*

8.8 Trades

8.8.1 Summary

This option displays the **Trades** summary window showing the quantity and value of products traded (given and received).

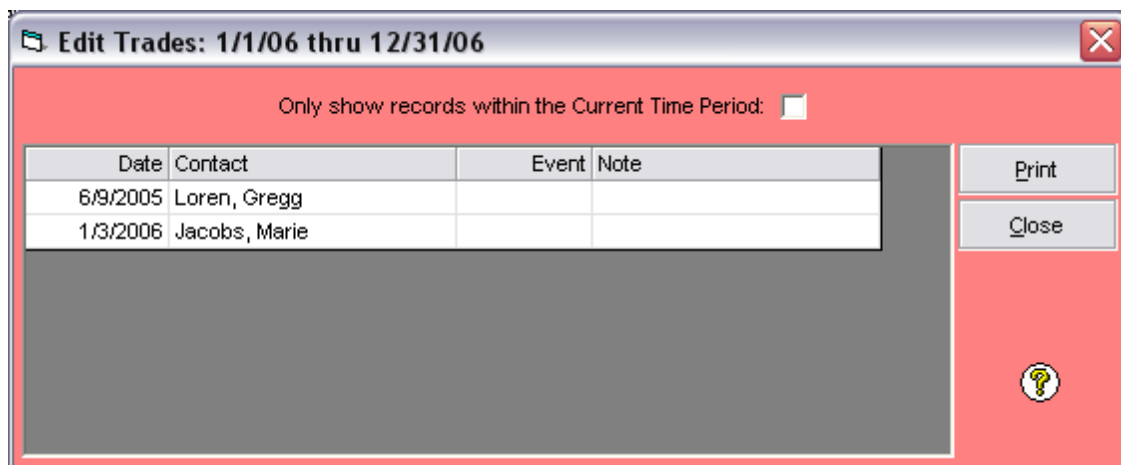
	Item #	Description	Qty	Value
1	101	Astoria Body Wrap	-2.00	(\$25.00)
2	102	Astoria Facial Creme	2.00	\$25.00

Totals: 0.00 \$0.00

The display can show all entries regardless of when they were entered or it can be limited to the **Current Time Period**, depending on the status of the **Impose Current Time Period** setting available via the right-click menu. If you have received more of a particular product than you have traded away then that product will be shown in black. If you have given away more than you have received it will be shown in red.

8.8.2 Edit

This option displays the **Edit Trades** window showing an historical account of all **Trade** transactions.



The display can show all entries regardless of when they were entered or it can be limited to the [Current Time Period](#), depending on the status of the **"Only**

Double clicking on any entry displays the **Product Trades** window allowing you to modify or delete the selected record

8.8.3 Record

This option displays the **Product Trades** window allowing you to create a record of product(s) you traded with someone else.

Product Trades

Date: 7/26/08 ...

Contact: Mosstet, Valorie ...

Event: (None) ...

Note:

Product(s) Given

	Item #	Description	Qty	Unit Retail	Extd. Retail
1	101	Astoria Body Wrap	1.0	\$19.00	\$19.00
2					
3					
4					
5					
			1.0	\$19.00	

Save

Close

Product(s) Received

	Item #	Description	Qty	Unit Retail	Extd. Retail
1	102	Astoria Facial Creme	1.0	\$19.00	\$19.00
2					
3					
4					
5					
			1.0	\$19.00	

Print

?

To create a **Product Trade** record, just do the following:

1. Click on the button at the right side of the **Date** box and select the date you traded the product(s). Dates can also be entered by typing directly into the box or using the **Up** and **Down** arrow keys or the **PgUp** and **PgDn** keys to scroll one day or one week at a time respectively.
2. Select the contact's name from your list of contacts by clicking on the button at the right side of the **Customer** box. Names can also be selected by typing directly into the box or using the **Up** and **Down** arrow keys and the **PgUp** and **PgDn** keys to scroll one name or several names at a time respectively.
3. If the trade occurred in connection with an **Event**, select the **Event** using the **Event** selection boxes or using the ellipsis (...) button to the right of the **Event** selection boxes. The trade will then be included in the **Event Summary** report on the **Reports** screen.
4. Enter a **Note** if you choose regarding the trade.
5. Select the product(s) you gave and received by **Item #** or **Description** and adjust the quantities as appropriate.
6. Click on **Record** to save the transaction.

8.9 Help

8.9.1 Setup Wizard

This option displays the **Purchase Settings** (full-inventory edition only) and **Sales Settings** windows, allowing you to configure the program in accordance with your specific business needs. Also displays

the [Preferences](#) window. All of these windows and settings are available individually using the **Settings** buttons on the **Purchases** and **Sales** screens and the **Preferences** option on the **Settings** menu.

8.9.2 ReadMe File

This option displays a text document providing company-specific instructions for entering purchases and sales. This option will not be visible if a company-specific file does not yet exist for your company.

8.9.3 Help Topics

This option displays the **Help Table of Contents**. The easiest way to locate the **Help Topic** you are looking for is usually to use the **Help**  buttons found throughout the program.

8.9.4 Training

This option starts your Internet browser and opens the training page on our website. The training page has information on the various training options we make available as well as instructions explaining how to submit a technical support request ticket.

8.9.5 Support

This option starts your Internet browser and opens our Support Center website. The Support Center contains various support resources including our searchable Knowledgebase and a support ticket system that allows you to submit support request tickets and view your previously-submitted tickets.

Submitting a ticket requires that you first register with our system. To do this, click on **Register** in the upper left corner of the Support Center home page and fill out the short registration form, using the same email address you used when you purchased the software. The password you enter can be any password of your choosing.

If you have difficulty logging in after registering, please click on the "Need help logging in" link located immediately below the **Login** button, for help in resolving your login problem.

To view our current support policy and determine whether you are eligible for free technical support just click on the "Submit a Ticket" icon on the home page of our Support Center. Our current support policy will be displayed on the page immediately following.

8.9.6 Release Notes

This option opens your web browser to a page on our website containing a list of the changes made in the program each time it has been updated.

8.9.7 Updates

This option checks for a newer program update and if found, prompts you to download and install it. If you are an AOL user or if you experience difficulty using this function, try clicking on the **Updates Link** option on the **Help** menu instead. This link takes you directly to the "Updates" page on our website where you can download the latest program update manually instead. You can verify that an update has been correctly installed by clicking on the [About](#) option on the **Help** menu and checking the "Program Version" number.

Tip: If an update appears to install correctly but the version number in your program does not get updated, the update may be getting applied to a second installation of the program on your computer. If this occurs, try searching your computer's hard drive for the file "CFO_v11.exe". If more than one of these files is found, rename or delete the one that is not in the folder containing your data, so that program updates do not "find" it when they are installed. If you accepted the default location during program installation, you will want to **keep the copy of CFO_v11.exe** which is **in the folder: C:\Program Files\CFO11**.

Please Note: These updates are "program updates" that fix bugs in the software and add capabilities. These updates do not update the product information in your software. Whenever new product information is available, MLM Software Solutions will contact you by email with instructions for updating your product listing, using the [Update Custom](#) option on the File menu.

8.9.8 Updates Link

This option starts your Internet browser and opens the "Updates" page on our website. This page contains links for downloading and installing the latest program update. This option can be used whenever you experience problems using the **Updates** option on the **Help** menu.

Please Note: These updates are "program updates" that fix bugs in the software and add capabilities. These updates do not update the product information in your software. Whenever new product information is available, MLM Software Solutions will contact you by email with instructions for updating your product listing, using the [Update Custom](#) option on the File menu.

8.9.9 Ordering Info OR Program Comparison

This option displays a feature comparison of the Basic, Standard, Professional and Professional (full-Inventory) editions of the program. If you're having trouble deciding which program is right for you this document should help. It includes pricing information and a list of the significant feature differences between the various programs.

Once you've made up your mind which edition is right for you click on the [Purchase](#) option on the **Help** menu for information on placing an order.

8.9.10 Purchase OR Upgrade



This menu option displays the **Program Licensing** window allowing you to:

- Purchase a license for the software
- Request a licensing Key Code
- License your installation by entering a Key Code

Purchasing a License

To purchase a license for the software, please click on the **Purchase** option on the **Help** menu, then click on the link that reads "Purchase a License" to go directly to our online ordering page. To compare the various program editions prior to purchasing, please click on the [Ordering Info](#) link on the **Help** menu in the program.

Requesting a Key Code to License a Demo Program

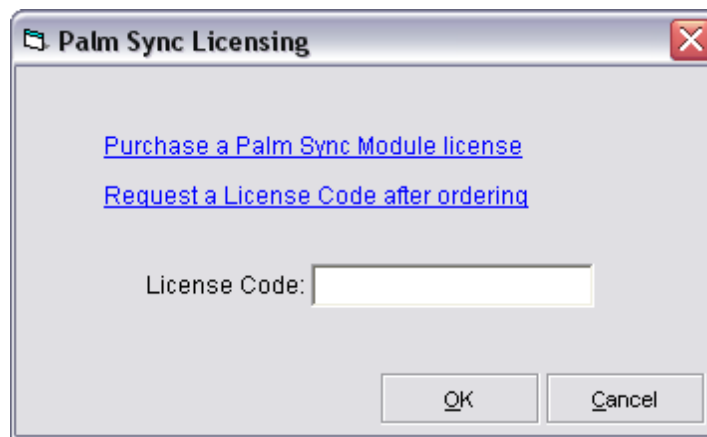
After submitting your order, click again on the **Purchase** option on the **Help** menu, then click on the link that reads "Obtain a Key Code". This will take you to an online form where you can submit your Key Code request. Key Code requests are responded to by live human beings in as timely a manner as possible so please have patience if we don't respond immediately.

Entering a Key Code to License a Demo Program

Once we have responded with the correct Key Code for your installation, click again on the **Purchase** option on the **Help** menu, copy (CTRL C) and paste (CTRL V) the Key Code we sent you into the **Key Code** box and click on **OK**. The program should respond with "Congratulations" and a confirmation of your licensing level.

Note: **Reg Codes** and their corresponding **Key Codes** change each time the program is installed. If you are installing from a CD, you will generally not need a Key Code, but if you are installing on multiple computers using the downloaded demo, or if you reinstall the program using the downloaded demo, you will need to request a new Key Code for each installation.

8.9.11 Palm Sync Install



This option displays the **Palm Sync Licensing** window allowing you to purchase or enter a License Code for installing the Palm Sync Module.

To purchase a license code click on the "Purchase a Palm Sync Module license" link in the **Palm Sync Licensing** window to be taken to our online shopping cart.

To obtain a license code once you have purchased, click on the "Request a License Code after ordering" link in the **Palm Sync Licensing** window to be taken to our online License Code request form.

If you have previously entered a Palm Sync Module license code and are reinstalling the module, the installation program will start immediately when you click on this menu option.

8.9.12 Palm Sync Logfile

This option displays the synchronization log file. This option will be grayed out if the **Palm Sync Module** has not been installed.

8.9.13 About

Displays the program's **About** window and copyright notice.



The **About** window includes the program's full version number, your current licensing level, **Palm Sync Module** licensing information and custom edition information if a custom edition has been installed.

Part



IX

Palm Synchronization

9 Palm Synchronization

9.1 Synchronization Overview

Synchronization is a one-step process that ensures you always have the most up-to-date data with you at any time. It allows you to replace pages of contact and appointment printouts with an easy-to-use, easily updateable handheld organizer.

Synchronizing your Palm-compatible organizer with your laptop / desktop computer causes both devices to update their databases to reflect any changes made in the other device. The program is designed to synchronize with the Address Book, Calendar, Tasks List and Memo Pad programs that come with your Palm-compatible organizer when you purchase it. This allows you to add contacts, set appointments, edit action items and swap memos, on the road, or from your home office, without ever having to reenter the data.

Palm synchronization capability is provided via an optional module that must be purchased separately.

Please Note: This module supports synchronization with **older Palm-compatible** handhelds only. **We do not currently offer a module that allows synchronization with Palm Pre, Pocket PC, Blackberry, Android or iPhone devices.**

9.2 Installing the Palm Sync Module

IMPORTANT: To prevent confusion, Palm-compatible organizers only allow a single desktop application to synchronize with each of the handheld's applications at any given time. Hence, installing the Consultant Front Office Palm Sync Module **will overwrite any other Address Book, Date Book, To Do List and Memo Pad modules you have previously installed (these applications are called Contacts, Calendar, Tasks and Memos in newer phones and handhelds)**. This means you will not be able to synchronize these applications with Outlook, Palm Desktop, or any software except Consultant Front Office, after installing the Consultant Front Office Palm Sync Module. To re-establish synchronization with a different application, simply uninstall the **Palm Sync Module** using Windows **Add / Remove** programs and reinstall the software that came with your handheld organizer.

1. Before installing Consultant Front Office or the Consultant Front Office Palm Sync Module, you will need to install the Palm Desktop software that came with your handheld organizer and establish synchronization between your handheld and the Palm Desktop software. If you have trouble with either of these steps, call the support number that came with your handheld organizer.
2. Once you have installed the Palm software and established synchronization, click on the **Palm Sync Install** option on the **Help** menu in Consultant Front Office. If you have previously entered a Palm Sync Module license code the installation program will immediately start up. If you have not previously entered a license code, enter the code now in order to start the installation process.
3. Follow the prompts to complete the installation. Then make sure that you have Consultant Front Office open on your computer the next time you sync.

TIP: If you reinstall the Palm Desktop software after installing the Consultant Front Office Palm Sync Module you will need to reinstall the Palm Sync Module before synchronization will be enabled. Click on the **Palm Sync Install** option on the **Help** menu to reinstall the module.

9.3 Synchronizing

Before synchronizing your Palm-compatible organizer with your laptop or desktop Consultant Front Office application you must first [install](#) the Consultant Front Office Palm Sync Module.

You must have Consultant Front Office open the first time you synchronize for the synchronization to actually take place. This is also true the first time you sync after performing a hard reset on your handheld, when the handheld has lost its data due to low batteries and when you have restored data into Consultant Front Office using the Restore function on the File menu. If you inadvertently synchronize without Consultant Front Office open under these conditions, simply start the program and then synchronize again. Subsequent synchronizations can be done without first starting Consultant Front Office.

To synchronize your Palm-compatible organizer with your Consultant Front Office software, do the following:

1. Place the handheld device on its cable or in its cradle.
2. Make sure that the other end of the cable is connected to your computer's USB or serial port.
3. Check the Windows task bar at the bottom of your screen to make sure **HotSync Manager** is running. **HotSync Manager** should start automatically anytime you open Consultant Front Office. It can also be started using the Palm Desktop option on the **Start** button **Programs** menu.
4. Push the synchronization button on the handheld's cable or cradle.
5. If this is the first time synchronizing with Consultant Front Office, if you've just cleared your organizer's memory by resetting, or if you have just restored data into Consultant Front Office using the **Restore** function on the **File** menu, you will be prompted to synchronize a second time to complete the initial setup process.

Once synchronization has begun you should see a status display on both your Palm-compatible organizer and on your computer showing you the current synchronization activity. If Consultant Front Office is open on your computer when synchronization occurs, it will automatically restart after synchronizing using the updated data.

Important: Consultant Front Office does not currently support data archiving. Records deleted from your Palm organizer will also be permanently deleted from Consultant Front Office, even if the Archive option is selected in your organizer at the time the record is deleted.

9.4 Synchronization - Restrictions

Archiving

Consultant Front Office does not currently support record archiving. Selecting the "**Save archived copy on PC**" (or similar) option on your Palm-compatible organizer when deleting an Address Book or Calendar record **will not cause the record to be archived on your PC. Records which are deleted from either your Palm organizer or from your laptop or desktop computer are permanently deleted and cannot be retrieved.** Performing periodic backups using the **Backup**

option on the **File** menu allows you to retrieve deleted data if necessary.

Private - Contacts

Consultant Front Office does not currently support marking of address book records as "Private" nor does it support hiding of records marked "Private" in your handheld. Although a record marked "Private" using your Palm-compatible organizer will remain "Private" during synchronization cycles, and can be hidden on your handheld using the handheld's security features, there is no way to hide a record or mark it as "Private" from within Consultant Front Office.

Private – Calendar, Tasks and Memos

Consultant Front Office does not currently support hiding of Private Calendar, Tasks List or Memo Pad records. Although a record marked Private can be hidden on your handheld organizer using the handheld's security features, there is no way to prevent the record from being shown within Consultant Front Office.

Calendar Categories and Recurring Tasks

Consultant Front Office does not currently sync Calendar categories or recurring Tasks. While Calendar categories exist in the program they are not synced to the Calendar application in the handheld. Recurring tasks are not currently supported in the program, partly due to limitations in the software made available by Palm for interfacing with their handheld applications.

9.5 Synchronizing - Special Considerations

Some of Consultant Front Office's capabilities require special treatment during the synchronization process. The following areas are not handled identically by Palm-compatible organizers and hence require some additional explanation.

User ID

Consultant Front Office only allows a single Palm user to be synchronized. If you have already assigned a User ID to your Palm organizer, that same User ID will be associated with the software the first time you synchronize. If you have not yet assigned a User ID to your Palm organizer, you will be prompted to do so the first time you perform a synchronization.

Groups and Categories

The maximum number of Categories allowed by Palm-compatible organizers is 15. The maximum number of **Groups** and **Tasks List / Calendar / Memo Pad** categories allowed by the software is 150. The first time you synchronize, the Palm organizer's Category lists get built by taking each list of existing Palm Categories and adding to it from the list of **Groups** or **Categories** in Consultant Front Office, until the handheld maximum of 15 is reached. Any record with a **Group** or **Category** that is not available on the Palm organizer, will be listed as "Unfiled" in the organizer, though the **Group** or **Category** for this record in the software will remain whatever it was before synchronizing.

Because of this difference in capabilities, you may want to take a minute *before synchronizing with the software for the first time*, to manually enter into your handheld the Address Book, Tasks List and Memo Pad categories you would like to have show up in your handheld, so that they are guaranteed a spot on the handheld's list before the software fills up the remaining empty spaces during the first synchronization.

To help you manage the difference in capabilities between the handheld and your software with regard to Categories and **Groups**, the following rules have been implemented:

- Adding a **Group** in the software *will add a Category* in the handheld.
- Deleting a **Group** from the software *will delete that Category* from the handheld.
- Adding a Category in the handheld *will add an equivalent **Group*** in the software.
- Deleting a Category from the handheld *will not delete a **Group*** from the software unless that category or **Group** is not being used by any records.

These rules allow you to easily control the list of Categories in the handheld while still maintaining a more extensive list of **Groups** in the software.

Tip: If you add a Category in your handheld because some of your records in the software have that category as their **Primary Group**, you will need to perform two sync operations before these records will show up in that Category on your handheld.

Team

Since Palm-compatible organizers do not keep track of the hierarchical relationship between members of your downline there is no way to synchronize Team additions or deletions. For this reason, if you add or delete a contact to the Team Category in your Palm organizer, the change will not be synchronized and will instead be overwritten by the corresponding record on your laptop / desktop PC during the next synchronization cycle.

Linked Appointments and Tasks

The Palm organizer's Calendar and Tasks List currently provide no way to link an appointment or task to one of your contact listings. If you have appointments or tasks, which are linked to a contact listing in Consultant Front Office, the synchronization process will place the contact's name in brackets and insert it at the beginning of the event's description. That way, you'll be able to see the link in your Palm organizer.

Restoring Data / Multiple Computers

It is generally not a good idea to use more than one computer when synchronizing with a handheld organizer.

In order to use multiple computers, you will usually be transferring data back and forth using the **Backup** and **Restore** functions on the **File** menu. When you use the **Restore** function on the **File** menu the synchronization process gets reinitialized. This can cause changes that have been made on your computer prior to the restore process to be overwritten by records in the handheld.

If you need to use two or more computers while synchronizing, then be sure to make all of your changes either on your handheld or on the computer that you are syncing with. You can then safely back up your data from that computer and restore it into your other computers without losing any of your changes.

Simultaneous Changes

When the same record is changed in both your Palm organizer and on your laptop / desktop PC the synchronization process examines the changes made to see if they are identical. If so, then no action is taken. If the changes made are not identical then the existing record is modified to reflect the organizer's changes and a new record is created to reflect the changes made in your PC.

More Than One Computer

If you will be running the program on more than one computer and transferring your data using the backup and restore functions in the program, it's recommended that you only sync with one of the computers. Syncing with two or more computers has not been tested and is not supported at this time.

Dates

Palm handhelds currently do not support dates prior to 1970. Setting a date prior to 1970 in Consultant Front Office and then synchronizing will result in that date being converted to the year 1970 in the handheld.

9.6 Synchronization - Troubleshooting

PROBLEM: Computer appears to sync normally but no data is exchanged with Consultant Front Office.

ACTION: Click on the HotSync icon in the lower right corner of your screen, then click on **Custom**. Check to make sure the following are listed under the heading **Conduit** :

- Front Office Contacts
- Front Office Calendar
- Front Office Tasks
- Front Office Memos

If these 4 entries do not appear under **Conduit**, try reinstalling the **Palm Sync Module** by clicking on the **Palm Sync Install** option on the **Help** menu.

PROBLEM: Palm Desktop and / or Outlook no longer exchange data with your handheld after installing the **Palm Sync Module**.

ACTION: This is normal. The Palm architecture only allows each of the handheld's applications to sync with a single Desktop application at one time, so installing the **Palm Sync Module** causes Consultant Front Office to replace Palm Desktop and Outlook as the sync partners for the Address Book Calendar, Tasks List and Memo applications on the handheld.

PROBLEM: Most of my records are synchronizing correctly but a few are not.

ACTION: Try performing a [synchronization reset](#). Open Consultant Front Office and hold down the **CTRL** and **SHIFT** keys on your keyboard while you perform a sync.

9.7 Synchronization Resetting

This feature should not be required during normal operation and is provided solely for the purpose of restoring synchronization integrity in the event of a problem.

Due to the complexity of the Palm synchronization process, it's possible that from time to time slight differences may develop between your Palm database and the Consultant Front Office application database. Synchronization Resetting allows you to establish a new starting point to ensure

synchronization integrity. There are two methods for establishing this new starting point as described below.

Synchronization Resetting causes the program to delete the current synchronization files on your PC. It does not delete data from either the Palm organizer or from Consultant Front Office and is the safest method for re-establishing synchronization integrity.

To perform a *Synchronization Reset*, do the following:

1. Create a backup of your data using the **Backup** function on the **File** menu.
2. Place your Palm-compatible organizer in its synchronization cradle.
3. With Consultant Front Office open, simultaneously hold down the **Control key (Ctrl)** and the **Shift (Shift)** key on your keyboard and push the Palm organizer's synchronization button.
4. When the sync operation completes, release the two keys, click **OK**, and sync one more time.

9.8 Uninstalling the Palm Sync Module

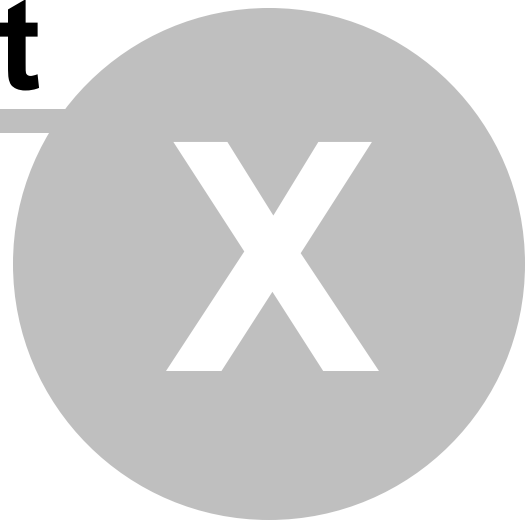
If for some reason you choose not to use Consultant Front Office's synchronization capabilities and wish to synchronize with a different Address Book, Calendar, Tasks List and Memo Pad application, you should first uninstall the Consultant Front Office Palm Sync Module. **Uninstalling this module will completely disable synchronization between Consultant Front Office and your Palm-compatible organizer.**

To uninstall the Consultant Front Office Palm Sync Module, do the following:

1. Using your mouse, click once on **Start** in the lower left-hand corner of the screen.
2. Move the cursor up the Start menu and click once on **Settings**.
3. Move your mouse to the right and click once on **Control Panel**.
4. In the window that opens up click once on the **Add / Remove Programs** icon.
5. Locate the **Palm Sync Module** application and click once on the **Add / Remove** button.
6. Select the **Automatic** method for uninstalling and click on **Next**.

Once you have uninstalled the Palm Sync Module, reinstalling the software you wish to synchronize with should restore synchronization.

Part



Troubleshooting

10 Troubleshooting

10.1 Using Help

There are several ways to access online Help. The best method is to click on any of the **Help**  buttons that can be found throughout the program. This will bring up context-sensitive help that is specific to the area of the program you are working in. Context-sensitive help can also be accessed at any time by pressing your **F1 key**. You can also activate Help by clicking on the **Help Topics** option on the **Help** menu or by clicking on the yellow question mark just above the left side of the main program toolbar.

The Help system has three views. The **Contents** organizes the help information according to the different screens in the program. The **Index** and **Search** tabs allow you to search the Help system for keywords or phrases pertaining to a specific topic.

Please remember that our website and online Knowledgebase have additional information that may be helpful. To access the Training page on our website, click on the [Training](#) option on the **Help** menu. To check our Knowledgebase or submit a support request ticket, click on the [Support](#) option on the **Help** menu.

10.2 Training

Please click on the [Training](#) option on the **Help** menu to visit our online Training center. This page is updated regularly whenever new training options become available.

10.3 Technical Support

Please click on the [Support](#) option on the **Help** menu for technical support assistance. This will open your web browser to our online Support Center where you can submit tickets and view our responses. You will need to register and log in, using your email address and a password of your choosing, prior to submitting your first ticket.

Part



XI

Purchasing and Upgrading

11 Purchasing and Upgrading

11.1 Feature Comparison

This option displays a feature comparison of the Basic, Standard, Professional and Professional (full-Inventory) editions of the program. If you're having trouble deciding which program is right for you this document should help. It includes pricing information and a list of the significant feature differences between the various programs.

Once you've made up your mind which edition is right for you click on the [Purchase](#) option on the **Help** menu for information on placing an order.

11.2 Purchasing a License



This menu option displays the **Program Licensing** window allowing you to:

- Purchase a license for the software
- Request a licensing Key Code
- License your installation by entering a Key Code

Purchasing a License

To purchase a license for the software, please click on the **Purchase** option on the **Help** menu, then click on the link that reads "Purchase a License" to go directly to our online ordering page. To compare the various program editions prior to purchasing, please click on the [Ordering Info](#) link on the **Help** menu in the program.

☐ **Requesting a Key Code to License a Demo Program**

After submitting your order, click again on the **Purchase** option on the **Help** menu, then click on the link that reads "Obtain a Key Code". This will take you to an online form where you can submit your Key Code request. Key Code requests are responded to by live human beings in as timely a manner as possible so please have patience if we don't respond immediately.

☐ **Entering a Key Code to License a Demo Program**

Once we have responded with the correct Key Code for your installation, click again on the **Purchase** option on the **Help** menu, copy (CTRL C) and paste (CTRL V) the Key Code we sent you into the **Key Code** box and click on **OK**. The program should respond with "Congratulations" and a confirmation of your licensing level.

Note: **Reg Codes** and their corresponding **Key Codes** change each time the program is installed. If you are installing from a CD, you will generally not need a Key Code, but if you are installing on multiple computers using the downloaded demo, or if you reinstall the program using the downloaded demo, you will need to request a new Key Code for each installation.

Index

- A -

Accounts

- Balancing your checkbook 184
- Cash account 181, 236
- Cash, checking and credit card account reconciliation 184
- Checking account 182
- Checking register 236
- Credit account 183
- Credit card register 237
- Depositing checks into checking automatically 232
- Depositing credit card receipts into checking automatically 232
- Reconciling an account 184

Archiving data 225

- B -

Backing up data

- Automatically backing up your data 217
- Performing a backup 215
- Protecting your data 28
- Reformatting your hard drive 217
- Reminder when closing the program 232
- Restoring data from a backup disk 216
- Verifying the integrity of a backup file 217

Bookkeeping 132

Borrowed products

- Creating a new entry 243
- Displaying a summary 242
- Editing an existing entry 242
- Tracking products that you borrow from someone else 179

- C -

Calendar

- Adding calendar categories 230
- Appointment categories 111
- Appointment reminders 104, 113
- Calendar category changes 230

Changing calendar entries from one category to another 230

Clearing old appointments 225

Creating an appointment 108

Deleting an appointment 110

Deleting calendar categories 230

Editing an appointment 109

Editing the list of calendar categories 28

Entering appointments 104

Filtering appointments 111

Linking appointments to contacts 113

Loaned product reminders 108

Monthly view 112

Overview 104

Performance 225

Printing a monthly calendar 112

Printing an appointment 111

Setting appointments 108

Setting pop-up reminders 104

View options 104

Viewing or printing appointments by month 112

Categories

Adding an event 228

Adding appointment and task categories 230

Adding contact groups 229

Adding memo categories 231

Adding new expense categories 227

Adding new income categories 226

Adding new products 136

Changing between businesses 215

Computer problems

Backing up your data 28

Data protection 27

Hard drive problems 27

Reformatting your hard drive 27

Viruses and hard drive problems 27

Windows problems 27

Contacts

Adding a client to your database 54

Adding a contact 51, 54

Adding a host to your database 54

Adding contact groups 229

Address labels 44

Adjusting your time zone offset 45

Auto dialing 93

Changing a contact 60

Changing contacts from one group to another 229

Contacts

- Client profiles 96
- Contact activities 51
- Contact group changes 229
- Contact groups 52
- Contact notes 95
- Contact screen options 51
- Contact status 98
- Contacts toolbar 51
- Contacts top toolbar 50
- Copying a contact's information to a new contact 51
- Creating contact groups 52
- Custom contact fields 89
- Custom contact reports 207
- Deleting a contact 51
- Deleting all of your contacts 225
- Deleting contact groups 229
- Deleting multiple contact listings 64
- Deleting team members 60
- Displaying a contact's information 59
- Downline status 98
- Editing a contact 60
- Editing the list of contact groups 28
- Editing the list of team titles 28
- Email 74
- Entering contacts 54
- Exporting contact data to another installation of Consultant Front Office 221
- Exporting contacts 103, 220
- Filtering contacts 50
- Finding a contact 59
- Follow-up 99
- Follow-up schedules 51, 89
- Getting organized 99
- Grouping contacts 52
- Importing contact data from Consultant Front Office 221
- Importing contacts 100
- Keeping it personal 44, 95
- Letters 50
- Mailing labels 44, 50
- Mail-merge email 50, 74
- Mail-merge letter writing 50, 83
- Making group changes 50, 65
- Merging two contacts' information 51
- Modifying a contact 60
- New contact 51

- Next appointment 99
- Next task 99
- Overview 44
- Personal client notes 95
- Preferences - Contacts 51
- Printing a contact's information 51
- Profiling clients 96
- Prospect status 98
- Ranking prospects 97
- Recommended products 96
- Recurring emails 99
- Replacing text or appending to Notes for groups of contacts 65
- Restore 50
- Saving a new contact 51
- Scheduled activities 99
- Scheduling activities 51
- Searching contacts 50
- Selecting contacts 59, 64
- Selecting groups of contacts 50
- Sending scheduled emails 232
- Setting a follow-up task or appointment 99
- Setting up your contact database 52
- Shipping labels 44
- Targeting contact groups 44
- Targeting groups of contacts 64
- Temporary contact groups 64
- Tracking prospects 44, 54
- Undoing a filter, search or select operation using Restore 50
- User-defined contact fields 89
- View options 45

Customization

- Adding choices to drop-down lists 28
- Adjusting column widths 28
- Configuring the contacts screen 45
- Sorting displayed data 28

- D -

- Data archiving 225
- Data Exchange
 - Importing data from your company's website 221
- Downline (see Team) 124
- Downloading data from your company's website (see Data Exchange) 221

- E -

Email

- Anniversary emails 91
- Annual recurring emails 91
- Automatic "tickler" emails 91
- Automatic birthday and anniversary emails 91
- Birthday emails 91
- Periodic recurring emails 91
- Recurring emails 91
- Renewal emails 91
- Reorder emails 91
- Setting up email 69

Errors

- Error 339 15, 25
- Error 372 25
- Error 52 215
- Error 7 25
- Missing or incorrectly registered files 25
- Reinstalling the software 25

Events

- Adding an event 141, 228
- Adding contacts to events 99
- Associating sales with an event 157
- Bookings 158
- Craft fairs 140
- Deleting an event 142
- Editing an event 142
- Editing events 228
- Event bookings 158
- Event history 99
- Event referral network 143
- Event sales 158
- Event summary 203
- Events 157
- Fundraisers 140
- Host credit calculation 203
- Host referral network 143
- Host summary 203
- Inside orders 158
- Linking sales to a party 141
- Outside orders 158
- Parties 140
- Party bookings 158
- Party sales 158
- Party tracking 157
- Sale booked Event 158

- Sale Event 157
- Tracking bookings 158
- Tracking event sales 157
- Tracking events 140
- Tracking party sales 157
- Trade shows 140
- Viewing your event referral network 143

Expenses

- Adding expense categories 227
- Bank statement importing 151, 218
- Changing expense entries from one category to another 227
- Creating expense records 148
- Credit card statement importing 151, 218
- Deleting expense categories 227
- Deleting expense records 150
- Duplicate entries 232
- Editing expense records 149
- Editing the list of expense categories 28
- Entertainment expenses 150
- Expense category changes 227
- Expense importing 151
- Importing financial data 151
- Meals expenses 150
- Microsoft Money compatibility 151
- Overview 147
- Quicken compatibility 151
- Summarizing taxes entered on the Income / Expenses screen 203
- Supporting entries for travel, meals and entertainment expenses 150
- Travel expenses 150

Exporting

- Data to another installation of Consultant Front Office 221
- eCard upload files 220
- Email address exporting 220
- For importing into an iCentris web-based system 220
- Merging data 29
- Multiple computers 29

- F -

Filtering and searching contacts

- Combining filter and search operations 65
- Contact groups 61
- Filtering contacts 61

Filtering and searching contacts

- Filtering incrementally 65
- Finding a contact listing 63
- Finding contacts based on what they have purchased 61
- Grouping contacts 61
- How to search your contact listings 63
- Incremental filtering and searching 65
- Incremental searching 63
- Locating a specific contact listing 63
- Mining your contact database 65
- Searching contacts 63
- Searching for a specific contact listing 63
- Searching for contacts by city or state 63
- Searching incrementally 65
- Sorting contacts 61
- Targeting a group of contacts 61
- Targeting groups of contacts 63, 65

Financial management 132

Freight settings

- Automatic freight calculations 133, 161
- Freight on product purchases 133, 161
- Freight on product sales 133, 161
- Freight rates 133, 161
- Freight settings for product sales 152
- Setting freight rates 133, 161

- G -

Getting started

- First steps 35
- Introduction 13
- Learning the software 35
- Main toolbar 13
- ReadMe File 248
- Training 248

Goals

- Business goals 145
- Financial goals 145
- Recruiting goals 145
- Setting and tracking business goals 145

- H -

Help

- Business resources 37
- Context-sensitive help 38, 261

Frequently asked questions 38, 261

IRS Small Business Publications 37

Knowledgebase 38, 261

Locating topics in the Help system' 38, 261

Topics 248

Using help 38, 261

Home

Getting started 40

Inspirational quotes 41

Today's activities 40

Home office

Business use of your home 191

Editing home office entries 194

Entering home office entries 192

Tracking home office deductions 191

- I -

Importing

Bank and credit card statements 218

Contact information from other programs 217

Content Bundle 218

Data from Consultant Front Office 221

Follow-up schedules 218

Importing data from your company's website 221

Leadership Pack 218

Merging data 29

Multiple computers 29

OFX, QFX and QIF files 218

Party Pack 218

Income

Adding income categories 226

Changing income entries from one category to another 226

Creating income records 148

Deleting income categories 226

Deleting income records 150

Duplicate entries 232

Editing income records 149

Editing the list of income categories 28

Income category changes 226

Overview 147

Summarizing taxes entered on the Income / Expenses screen 203

Installation

Buttons missing on Sales and Purchases screens 15

Installation

- Changing between businesses 215
- Compatibility with Windows Vista and Windows 7 15
- Demo program licensing 250, 263
- Demo program operation and licensing 17
- Entering a Key Code into the software 250, 263
- Fuzzy screen 15
- Getting the program to fit on your screen 15
- Hardware requirements 15
- How to order 250, 263
- Licensing a demo installation 17
- Licensing the software 250, 263
- Memory requirements 15
- Program not entirely visible 15
- Read-only warning 15
- Removing a previous version 15
- Screen resolution 15
- System requirements 15

Introduction 13**Inventory**

- Backlog warning - turning on and off 232
- Obsolete products 199

- L -**Labels**

- Changing the position of text on a label 84
- Combining First and First Addl names on labels 84
- Creating a custom label 87
- Creating labels 84
- Custom Labels 87
- Editing label margins 84
- Mailing labels 87
- Positioning text on address labels 84
- Printing labels 84
- User-defined labels 87

License agreement

- Loaning my software to a friend 14

Loaned products

- Create a new entry 244
- Displaying a summary 242
- Editing an existing entry 242
- Tracking products that you loan to another person 179

- M -

Mail-merge email 74

Mail-merge letter writing 83

Memos

- Adding memo categories 231
- Changing memo entries from one category to another 231
- Creating a memo 121
- Deleting a memo 123, 225
- Deleting memo categories 231
- Editing a memo 122
- Filtering memos 123
- Memo category changes 231
- Overview 121
- Printing a memo 123

Merging data 221

Moving data 29

Multiple businesses 215

Multiple computers 29, 221

- N -

Networked computers 33

New computer 29

- O -

Ordering info 249, 263

Owner information 231

- P -**Palm Sync**

- Conduit installation 254
- Conduit uninstalling 259
- Considerations when synchronizing with a smart phone or handheld organizer 255
- Contact groups 256
- Installing the Palm Sync Module 251
- Logfile 251
- Overview 254
- Palm Sync Module installation 254
- Realigning the program with your smart phone or handheld organizer 258
- Synchronization - Restrictions 255

Palm Sync

- Synchronization failure 254
- Synchronization Resetting 258
- Synchronizing for the first time 255
- Troubleshooting 258
- Uninstalling the Palm Sync Module 259
- Version number 251

Parties (see Events) 140

Password protecting your data 231

Personal Use

- Editing personal use records 240
- Summary of personal use entries 240
- Using products for personal use 177
- Withdrawals for personal use 241

Preferences

- Backing up data 232
- Depositing checks into checking automatically 232
- Depositing credit card receipts into checking automatically 232
- Duplicate entries 232
- Program updates 232
- Rounding errors 232
- Screen color 232
- Sending scheduled emails 232
- Task alerts 232

Products

- Adding new products 136, 228
- Breaking up product bundles 138
- Bundled products 138
- Changing product information 136
- Changing product prices 228
- Converting item numbers 136
- Deactivating products 228
- Deleting products 228
- Editing product information 136, 221, 228
- Entering new products 221
- Importing product updates 221
- Item numbers 136
- Modifying product information 136
- Product groups 228
- Product updates 221
- Removing products 136
- Selling individual items from product bundles 138
- Taxability settings 228
- Update Custom 221
- Updating product information 221

Program updates 27, 249

Purchases

- Deleting purchases 177
- Duplicate entries 232
- Editing purchases 176
- Free products 198
- Freight (see Freight settings) 133, 161
- Overview 172
- Product exchanges 199
- Product purchases 172
- Tax rates 247
- Taxes (see Tax settings) 134, 162
- Vendor 175

- R -

Reconciling an account 184

Record keeping 132

Reformatting your hard drive 27

Reports

- Balance Sheet Report 208
- Cost of Goods Sold 209
- Creating a report 204
- Customizing reports 204
- Discounts and credits 203
- Doing your taxes 209
- Downline ID numbers 203
- Event and Host Summary reports 211
- Filtering reports 204
- Gross receipts 209
- Host credit calculation 203
- Income statement 208
- Income Tax report 209
- Monthly Summary report 212
- Options 203
- Party recap 211
- Profit and Loss report 208
- Schedule C tax report 209
- Sorting reports 206
- Summarizing event activity 211
- Tax report 209
- Types 201
- Yearly Summary report 213

- S -

Sales

Sales

- Backorders 160
- Balance dues 164, 172
- Credit card processing 170
- Customer 156
- Customer exchanges 199
- Deleting sales records 166
- Designating potential hosts 158
- Designating potential recruits 158
- Discounts 160, 169
- Drop ships 198
- Duplicate entries 232
- Editing sales records 165
- Entering sales 154
- Freight (see Freight settings) 151
- Host orders 158
- Invoice uploading 170
- Item # 160
- Merchant account 170
- Overview 151
- Payment tracking 164
- Potential Host 158
- Potential Recruit 158
- Product groups 159
- Product sales 151
- Receivables 164, 172
- Reorders 159
- Returned products 199
- Shipping directly to clients 198
- Taxability 160, 169
- Taxes (see Tax settings) 151
- Undelivered products 160
- Unpaid invoices 164, 172
- Uploading credit card payments to ProPay 170
- View options 152

Samples

- Charitable donations 178
- Donating products 178
- Editing sample records 238
- Product samples 178
- Summary of sample product entries 238
- Withdrawing products for use as samples 239

Schedules

- Appointment schedules 89
- Creating Schedules 89
- Duplicatability 220
- Empowering your team 220
- Exporting follow-up schedules 220

- Scheduled appointments 89
- Scheduled emails 89
- Scheduled tasks 89
- Scheduling appointments and emails 89

Searching and filtering contacts

- Combining filter and search operations 65
- Contact groups 61
- Filtering contacts 61
- Filtering incrementally 65
- Finding a contact listing 63
- Finding contacts based on what they have purchased 61
- Grouping contacts 61
- How to search your contact listings 63
- Incremental filtering and searching 65
- Incremental searching 63
- Locating a specific contact listing 63
- Mining your contact database 65
- Searching contacts 63
- Searching for a specific contact listing 63
- Searching for contacts by city or state 63
- Searching incrementally 65
- Sorting contacts 61
- Targeting a group of contacts 61
- Targeting groups of contacts 63, 65

Setting up email 69**Setup**

- Backing up your data 28
- Business setup 18
- Changing categories 229
- Changing companies 224
- Current Time Period 139
- Custom editions 18
- Deleting a business 224
- Freight settings 18
- Owner information 18
- Preference settings 18
- Renaming a business 18, 215
- Sales tax settings 18
- Setting up your business 18
- Setup wizard 18
- Spouse is also a consultant 32
- Starting over with your financial recordkeeping 224

Sharing data 29

- Synchronizing data 29, 221

- T -

Tasks

- Adding task categories 230
- Changing task entries from one category to another 230
- Creating a Task 117
- Deleting a Task 118
- Deleting task categories 230
- Deleting your entire Task list 225
- Editing a Task 118
- Filtering tasks 119
- Linking tasks to a contact 120
- Overview 114
- Printing tasks 119
- Sorting tasks 119
- Task category changes 230
- View options 115

Tax settings

- Automatic tax calculations 134, 162
- Setting sales tax rates 134, 162
- Tax settings for product sales 152

Taxes

- Board of Equalization 210
- Cost of Goods Sold 197, 209
- Doing your taxes 209
- Exporting data to TurboTax and TaxCut 198
- Gross receipts 209
- Income tax 195
- Income Tax report 209
- Inventory 197
- Obtaining a free tax quote 197
- Preparing to do your taxes 195
- Printing a sales tax report 210
- Printing tax reports for your accountant 197
- Sales tax 195
- Sales Tax report 210
- Schedule C tax report 197, 209
- Tax preparation 195, 197
- Tax report 209

Team

- Adding a team member 127
- Changing colors and shapes on the Team screen 129
- Creating your team genealogy 127
- Deleting a team member 127
- Downline 58

- Downline viewing options 124
- Editing a team member 127
- Entering your downline 58
- Entering your team 58
- Filtering team members 128
- Locating a team member 127
- Overview 124
- Printing your team genealogy 130
- Selecting a team member 127
- Team genealogy 58
- Team viewing options 129
- Tracking your downline 58
- Viewing a leg of your team 128
- Viewing your downline 124
- Viewing your team by title 128

Technical Support

- Asking a question about the software 248
- Assistance 261
- Assistance with the software 248
- Getting assistance 261
- Problems 261
- Requesting support 248, 261
- Submitting a support ticket 261

Trading products 180

- Editing trade entries 246
- Recording product trades 246
- Summarizing product trade entries 245

Training 248, 261

Transferring data 29

- U -

Updates 249

- V -

Vehicles

- Actual expense method of deducting vehicle expenses 187
- Car and truck deductions 187
- Editing vehicle information 189
- Entering vehicle information 187
- Overview 186
- Standard mileage rate 187
- Vehicle deduction tracking 187

- W -

Working with an assistant 29, 221

Back Cover