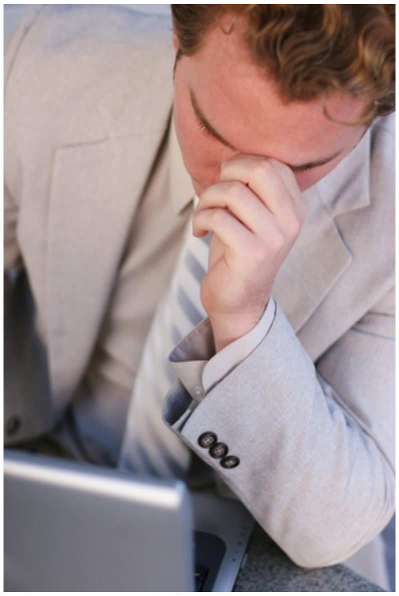
MasterQ - From Call to Quote in 30 Seconds

User guide

Table of Contents



"I used to struggle to create professional, accurate quotes. Without my close supervision, the quotes we developed often included short, jargon filled descriptions that may have made sense to *our* employees but were vague, at best, to our customers. I'm a bit particular about some things, and product descriptions on quotes are certainly one of them. I tried pulling descriptions from our accounting software, but often times, the descriptions that I wanted to include in our *quotes* were significantly different than the descriptions required by other departments. The production or accounting departments, for example, didn't care if the product was "Made in the USA.", but I wanted to include that in my quotes where it was appropriate. And I don't even want to talk about spelling. MasterQ corrects these problems and enables me to create quotes with consistent, marketing-oriented descriptions of my choosing extremely quickly."

And then, there was pricing. I was always concerned I might quote an inaccurate price. Had this item been quoted or sold to the customer previously? Or how about their parent company? How long ago? Who was buying this part now and at what price? Keeping an up to date list of recently quoted prices and recent sales prices was a time consuming nightmare. And did I have the product in stock?

In addition to our standard, popular products, many items had high margin accessory items that could be offered if we only thought to ask. We did the best we could, but I'm sure we missed the opportunity to increase sales by offering other valuable items to our customers. Items that they might need.

Quotes were actually *typed* in our original system and filed in a series of hanging folders **by year**. When I needed to see the physical quotation, someone had to visit the various filing cabinets and locate the document in question. Hopefully, it was filed accurately.

At one time, we actually tried to keep track of quoted prices using a three ring binder! Then we tried using an Excel spreadsheet. And while that was an improvement, it certainly had limitations.

We got the job done with varying degrees of success, but it was a time consuming process.

I envisioned a system that would enable our multiple salespeople to quickly generate quotes in a consistent format using the exact text I designated for each part. But we would also need the ability to modify individual quotes when needed. Completed quotes needed to be accessible over our network to all authorized employees and all prices issued would be tied to each customer and part record. With this system, I could call a quote request in over the phone after a sales call and be confident that the generated quote would meet my marketing vision perfectly. Last, the system would need to work with our existing computer software - I could not implement a system wide software revision.

MasterQ is the result of that vision. With MasterQ you can:

- Create **standardized, consistent, marketing-oriented descriptions** to be used on every quote you build, yet still be able to "tweak" a description on any individual quote.

- Make additional sales by using MasterQ's "Fries" feature. Similar to the fast food restaurant that asks if you want fries with that order, our "fries" feature reminds you to **quote additional related products** that your customer may want or need.

- **Have total control over the quote format.** Design a **custom quote template** using Microsoft Word containing your company logo, address etc.

- **Quote proper pricing every time.** Instantly review prices quoted to related companies and other customers. View prices most recently paid by current customers including the customer being quoted.

- **Modify the generated quotes** using Word, then print, fax, convert to PDF, anything you can do with Word. And always have these quotes available at the touch of a button.

- **Automatically save** the final copy of your quote for future reference.

- Allow other network users (with your permission) to access the quotes you create quickly.

- **Always have product information at your fingertips.** Access supplemental part information at the click of a button. Have access to drawings, warranty information, even customer testimonials. What ever type of document you might need.

- **Always have customer information at your fingertips.** Phone numbers, address, web site links, shipment history, contact information and most importantly, the proper spelling of the customer's name.

- **Free up your time.** Creating quotes exactly as you would like them becomes a task you can confidently delegate using MasterQ.

- **Unlimited Access.** Allow **any number of users** (with your permission, of course) to use the customer and part database or create quotes using one standard quote template for everyone or a template configured for each of them individually. Specify other users who may view, but not create quotes.

Consider this first...

There are just a couple of thing you absolutely need to consider before you get started.

Please take just a few minutes to review the information in this section. It could save you much frustration in the long run.

Next: Microsoft Security Essentials & Anti-Virus Software

Microsoft Security Essentials & Anti-Virus Software

Security Essentials (MSE) is a free anti-virus protection program offered by Microsoft. MSE was supported through Windows 7. If you do not have MSE installed on **any** of the PC's that will be using our programs, this concern does not apply.

The Microsoft MSE program has been known to cause file errors in certain data files while protecting from potential virus attacks. By default, Agenda Development's products will issue a warning when the programs start.

Personally, we prefer Norton's Internet Security program (www.norton.com) . Currently on their web site for $50 for 3 computers.

If MasterQ finds Microsoft Security Essentials running on your computer, a warning message will be displayed. If you insist on running MSE (did we mention that we do not recommend this?) you should take the following steps:

1. Using MSE, specifically exclude files with a suffix of TPS disabled files with a **TPS** or **EZH** extension.

2. Exclude scanning of the folder you install Agenda Development software into.

3. Back up regularly.

4. Add **/RISK** to the command line when starting MasterQ. This will eliminate the start up warnings. If you are also including the user name and password on the command line, the /RISK command should be the last item on the line.

Next: MasterQ Requirements

MasterQ has a few requirements.
Please review to get the most out of your program.

MasterQ is a Windows based program and requires Microsoft Windows* to operate. It has not been tested on Apple computers using any of the Windows cloning tools they offer. It has been used extensively in Windows XP, Vista and Win7. It appears to work on Windows 98, but perhaps it's time you think about upgrading. <Grin>

MasterQ uses Microsoft Word* to create quote documents. You must have Word installed on any computer you wish to use for viewing or creating quotes. However, you can allow computers on your network to access MasterQ's parts, customers, people and salesman databases without the need for Word.

The screens in MasterQ are designed to fit on a screen with a minimum resolution of 1,024 x 768.

Microsoft Excel* is recommended. If you have Excel you can leverage the value of MasterQ by easily exporting data at the click of a button. Some generated reports are created using Excel.

While not a requirement, large screen monitors can be a real productivity boost. Given the low price, energy efficiency and small desktop real estate required, we **strongly** recommend big monitors. The windows designed in MasterQ will fit on an 1,024 x 768 pixel display and a tool is included to give you lots of display flexibility.

MasterQ does not require a network to operate. You can install it one one stand alone PC. However, we strongly recommend installing the software in a shared folder on your network. Even if you are the only person who will be creating quotes, there are many advantages to sharing the data files and future Agenda Development programs you may install at a later date.

* Microsoft Word, Excel and Windows are trademarks of the Microsoft Corporation and are not affiliated with Agenda Development.

Next: Choosing a Location to Install the Program

Choosing a location to Install the Program

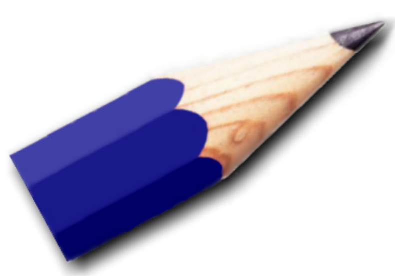
If the MasterQ program will only be used by one person, on one particular computer, installing the program on a local hard drive on that one machine will result in the best performance and security. The trade off is that the program and all the quotes you generate will *only* be available to people with access to that *particular* computer and you will give up a great deal of information sharing. Even if you only *think* you might want to give multiple people the ability to access the programs someday, we recommend installing MasterQ in a shared directory on your network.

Other Agenda Development software uses the same data files you will be creating with MasterQ. If the database is only available on one computer, you have placed significant limits on yourself.

We don't recommend this, but...
If you do install this on a stand alone computer (not on a network), do not install it to the typical C:\Windows\Program Files (x86) folder. Instead, choose a folder location like C:\AgendaSoftware.

If you are using other Agenda Development software, install MasterQ in the same folder. For example, the NaftaBlaster program uses the same customer file and shipment history to generate annual Certificate of Origin reports for your customers. Having all Agenda Development software in one shared directory is highly recommended.

TIP:
Not sure which way to go? If you can't decide, we suggest installing MasterQ in a shared directory on your network server. Set permissions so that everyone can read and write to this directory. Users will still need a password to access the MasterQ program.



Do you have a unique part number assigned to each of your products?
Next: Assigning Item Numbers

Assigning item numbers

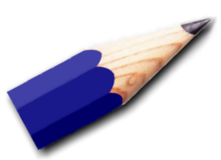
If you use part numbers, Do you have a *unique* part number assigned to each of your products/services?

The MasterQ program can accept up to 20 numbers or letters as item numbers. You are not required to *print* these item numbers on your quotes, but MasterQ needs a way to uniquely identify each item... therefore, you will still need to assign numbers.

If you don't use part numbers...

Service companies typically don't think of the items they offer as something that conforms to a *part number* scenario. You will still need to assign "numbers" to each service you define but these numbers can be used internally only. You do have the option to omit these numbers from the generated quotes if you wish.

Consider the following advice regarding part numbers:



Assign your own part numbers. In most circumstances, you should never use your vendor's part numbers as yours. Why? If you use your vendor's part numbers as your own, you are inviting customers to shop the Internet for other prices & sources. And what happens if you change suppliers on equivalent commodity type parts?

Use a consistent part number format. As an example, your number format could be ##-###, or ###-##-####, or even ####. But if you keep it consistent, errors will become more obvious. Cartons in your warehouse may have multiple part numbers on them. If your part number always follows a particular format, everyone will easily recognize *your* number.

Shorter numbers are better. They take less time to write, are easier to remember, and it is less likely digits will be transposed.

Each unique part needs it's own unique part number. This is a problem that many company's struggle with. You cannot have two items that are not the same using the same part number.

Avoid using certain confusing digits. Lower case L's can be mistaken for 1's or upper case I's. Upper case O's might be the digit 0. If possible, avoid using lower case letters, and the letter O. Don't use spaces or punctuation in your part numbers unless it is part of your standard part number format.

Don't use punctuation in part numbers. No periods or commas and never a space. Never use quotation marks. The only exception would be if periods were part of your part-number format. For example 01.01.2010, but even then we would warn you against this. Trust us, in the long run, you will regret using special characters.

Do you have a unique ID number assigned to each of your customers?
Next: Assigning Customer Numbers

Assigning customer numbers

Do you have a unique ID number assigned to each of your customers?

MasterQ can accept up to 10 numbers or letters to uniquely identify each of your customers. Some people find it easier to search for a customer using their number rather than their name. In most cases you will be able to use either the customer's name or ID number so you won't need to memorize them. The "customer" database you will use with MasterQ is shared by other Agenda Development software. While the MasterQ program will use this file of companies to identify *customers*, other Agenda Development programs can use this same file to identify *vendors* or even retail customers. Consider the following...

Use existing customer numbers if available. There is no point in having different customer numbers in different systems. If you use other software (accounting software, for example) and it uses customer numbers then using the same numbers will make it easier for people who work in both systems. Plus, sharing data is much easier this way.

Use a consistent format. This can help you avoid errors when using customer numbers.

Consider starting with two or three characters as a customer numbering scheme. MasterQ needs to use *some type* of numbering system to identify customers. If you do not currently have a customer numbering system in place, consider keeping it simple. Using just 2 characters (1-9 and A-Z) can uniquely identify over a thousand different customers. Need more? Going to three characters can identify almost 36,000 unique customers while four characters will cover over a million.
MasterQ can be set up to automatically assign numbers for you. See Telling MasterQ How to Number Your Customers. Another popular numbering scheme involves using the first letter of the company name followed by an arbitrary number of digits. This can make it a bit easier to locate a particular customer in a list that is sorted by customer number. However, it becomes confusing when Acme Widgets (customer number A1000) changes their name to Zebra Widgets and retains the customer number of A1000.

One number for each Customer or each Location? You can do either; there are advantages and trade offs with both.

If all customer locations are covered by *one customer number*:

- you can easily see all of the quotes issued to the entire organization.
- When creating a quote, it's easy to recognize if you've quoted (or sold) a part to the customer previously.
- The shipment history will include every part purchased by all customer locations.

- Various reports and summaries cover the entire family of locations rather than reporting shipments to one plant or location.

But if you choose to assign a unique customer number to *each customer location*:

- When viewing your quote history, it is easy to see quotes limited to one particular location.
- When creating a quote, MasterQ warns you if you have ever quoted or sold a part to the customer previously. (MasterQ allows you to also check quotes & sales to up to three additional related customer numbers)
- View a shipment history that *only* reflects shipments to one location.
- Various reports and summaries cover one particular shipping location.

Customer numbers *can* be totally arbitrary. But should they be? Some people will select customers by name while others will think in terms of customer numbers. If numbers are totally random, it can be difficult to find a particular customer and more difficult for people to remember them. Keeping arbitrary numbers short will help.

Use a different format for Customer numbers than Vendor numbers. Vendor numbers are not a part of the MasterQ program but are used by other Agenda Development software that you may use now or in the future. Using a different format for these two company categories can make it easier to segregate one group from the other.

Some customer numbers are reserved. Customer ID number 1 is reserved for your company. Customer numbers that start with the letters PR are special numbers for Prospects. Customer numbers beginning with RET are reserved for Retail customers (this enables features in other Agenda Development software that you may use now or in the future.) In addition, you may choose to create "customer" numbers for classes of customers that would be used to pull up standard pricing when building a quote. Planning ahead you should avoid using a dealer number of "DEALER". "RETAIL", and "OEM" and similar categories you may wish to assign in the future.

Maybe you don't even need customer numbers. MasterQ *needs* a customer numbering system, but you may not. MasterQ is very efficient in helping you locate a particular customer without being aware of their customer number.

MasterQ makes it easy for you to assign new customer records by using *your* customer numbering rules. You can see how this is set in the System record by clicking here.

Selecting an Installation Locations

During the installation process, you will be asked *where* to install the software. You may choose to install the software on your local hard drive or in a shared folder on your network server. There are advantages and disadvantages to both choices.

Local Installation - Installing MasterQ on your local hard drive will result in fast access (since the data files are located on your PC) and greater security (since only people with access to your computer may use it). However, in the future you may be limited if you wish to install other Agenda Development programs. If you do not have a network server, but do have a local network, you can install the programs in one folder on one computer and set up the folder as a shared resource. You may still control who has access to any of the Agenda Development programs. Don't forget to set up a regular back up system.

Server Installation - If you have a network server, the best place to install the programs are in a folder with read/write access to everyone. Since servers are typically backed up on a regular basis, this is an ideal choice.

Next: The System Record

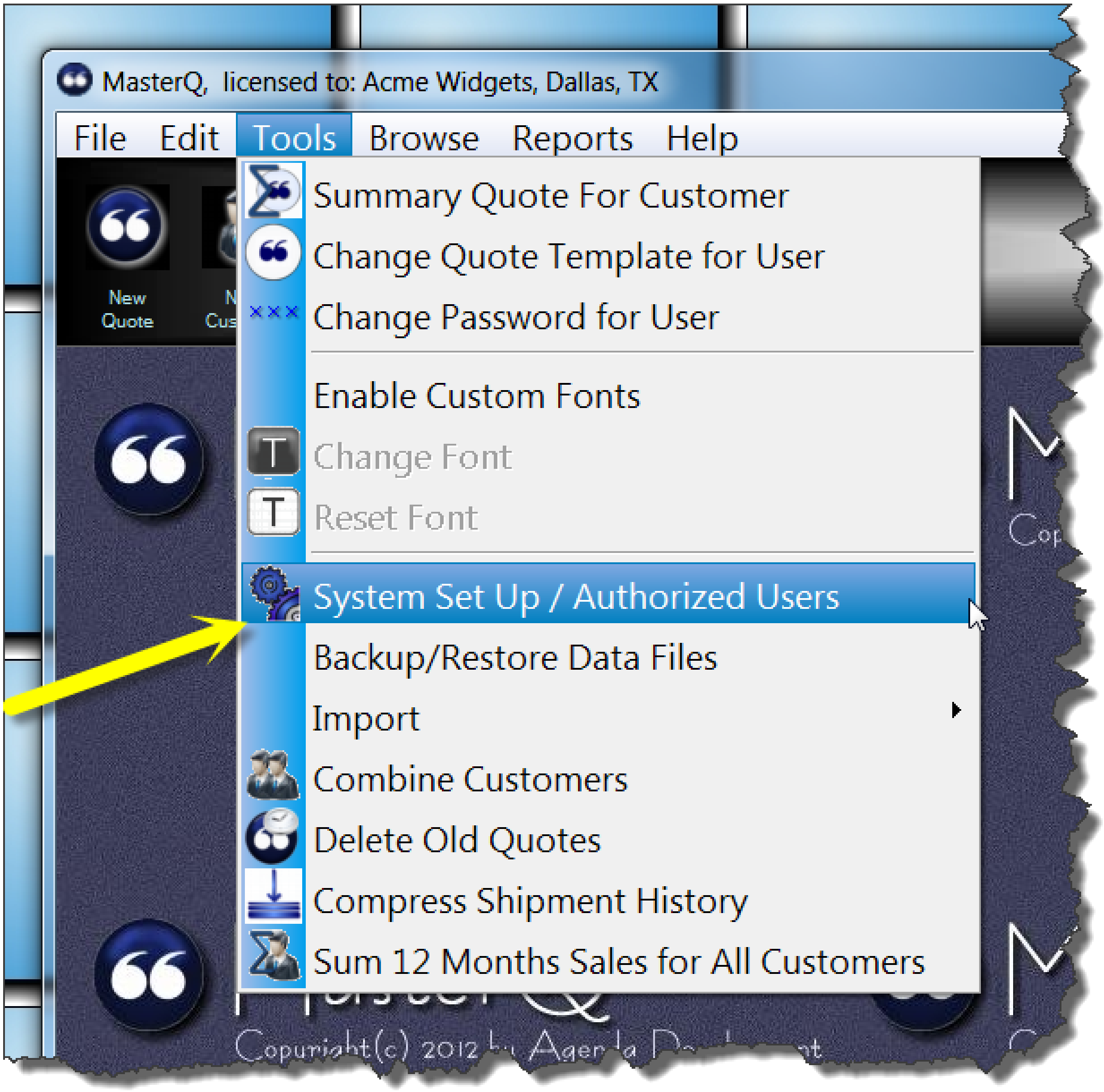
System Record

The System record contains information about *your* company. Your address, default terms, and other special "tweaks" that will enable MasterQ to work as you require.

The system record is created when you first install MasterQ. Your user account must be set up as a MasterQ Manager or super user to modify the system record.

To access the system record, select TOOLS | SYSTEM SETUP / AUTHORIZED USERS from the main menu.

NOTE: Your User Account must be designated as a Super User or Manager to access the System Set Up. For more details on setting permissions for users, click here

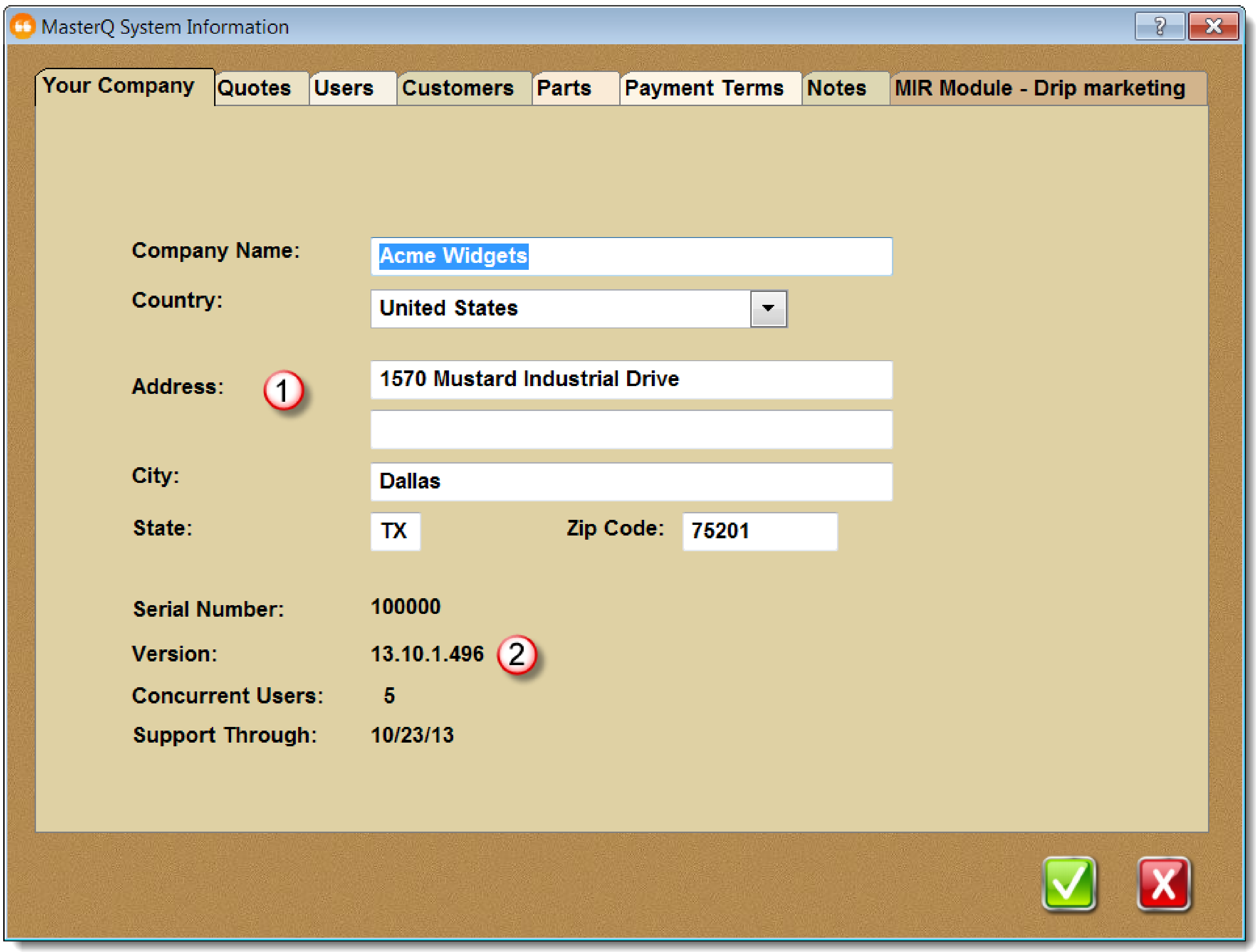


Next: [Company Tab]

Company Tab

The Your Company tab contains general information such as your address, serial number and current version.

Your software is licensed for installation at one location. Contact Agenda Development if you need to change your address or company name.



Next:

Quotes Tab

Quotes Tab

The quote tab sets up default values to be used on all quotes. But almost everything can be changed for *individual* users and even *individual* quotes. The values you set here will be used as a time-saving starting point.

MasterQ uses a Quote Template as a starting point when creating quotes. These templates are Word documents that contain your quote format and text that should appear in all quotes. Default quote templates are included and can be modified to meet your specific needs. Additional templates are available on our web site.

The quote template you set here will be used by every user of the program *unless* you say otherwise. Each user *can* use the same template, or they can each have their *own* template. To see how to select a template for a particular user, click here.

Find out more about modifying templates here.

1

Look Up Button - Press this button to select the Word document to be used as the quote template by browsing files on your computer. This template is saved in the folder you installed the program in.

2

Edit Template in Word - Press this button to open the selected template document in Word to make changes. The quote template may also be modified directly from inside Word.

3

Word Quote Template - This field shows the actual path and filename of your default word template. In Windows, the ".\" prefix indicates the *current* folder. In this case, it would mean the folder you installed the program into.

4

Quote Substitutions - Displays a PDF document listing all of the available quote macros. These macros will be replaced by the appropriate information each time a quote is created.

5

Force DOC documents - Check this box and MasterQ will use the older DOC format for Word documents. This insures that the documents can be read by newer as well as older versions of Word that may be installed on some of your computers. We suggest checking this box.

6

Location to Print Customer Part Number - Many customer find it convenient to have *their* part numbers appear on your quote. MasterQ includes the ability to link your customer's part numbers to yours. Check the appropriate choice to indicate *where* on the quote you wish the customer's numbers to print.

Note: When you quote an item that does not have a customer item number linked to it, no customer number will print.

7

Customer Part Number Format - If a customer number *does* exist, it will be formatted as you show here. You may place any text around the keyword: **$PartNumber** in this field.

For example, if you are creating a quote for an item with a customer number of 1234 and you have entered **Your Item Number: $PartNumber** then MasterQ will print **Your Item Number: 1234** on the quote in the location you specified in number 6 above.

Another example: If you enter **($PartNumber)** then MasterQ will print **(1234)** on your quote.

If this field is left blank, only the customer's item number will print.

8. **Quotes Include Our Part Numbers -** Some business models do not need to show your item numbers on the quote. Most users will leave this box checked to add your part number to each line item quoted.

9. **Print Quantity on Quotes -** Most users will leave this box checked to enable printing quantities on the quote form.

10. **Automatically Show "Fries" when creating quote -** MasterQ-PRO and MasterQ-ENT allow you to identify additional items your customer may wish to consider when purchasing various items. Checking this box will automatically display these related "fries" to remind you to quote them. If un-checked, you must press the "fries" button to see available items. Find out more about fries here.

11. **FOB -** Enter the FOB point you wish to use on most of your quotes. You may change this value for quotes issued to specific customers or for a particular quote.

12. **Ship Via -** Enter the description of the shipping method you will most often use in your quotes. This value can be changed for specific customers in their customer record or changed on any individual quote you create.

13. **Shipping Date -** Enter your usual lead time. This should be something like *one week* and not a specific date like June 1, 2011. This value can be changed for each individual quote.

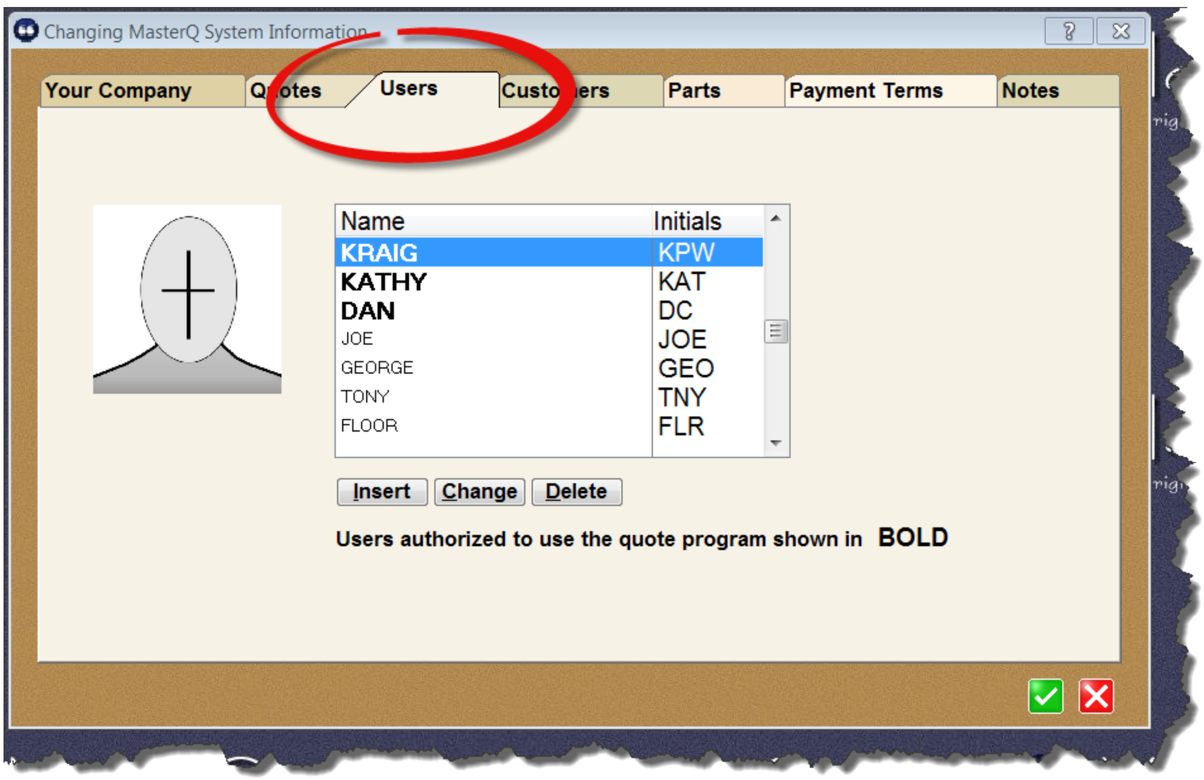
Next:
Users Tab

User Tab

Users can be given permission to access the MasterQ program from the Authorized Users tab in the system set up window. Select **TOOLS | SYSTEM SET UP** from the main menu then selecting the USERS tab.

NOTE: New users can only be set up by Users with the MasterQ Manager or Super User option enabled.

After opening the System Set Up form, select Authorized Users.



Authorized users are entered on this tab. It is important to recognize that users listed here have been given access to Agenda Development programs you have purchased. They *may* not have been given authorization to access the MasterQ program. Users <u>with</u> authorization to access MasterQ are shown in **bold**.

TIP: While you can delete users from this screen, we recommend against it. Users listed here have may still need access to other Agenda Development programs. Instead, if you wish to revoke access to the MasterQ program simply edit the user's privileges as shown below.

1.

Next:

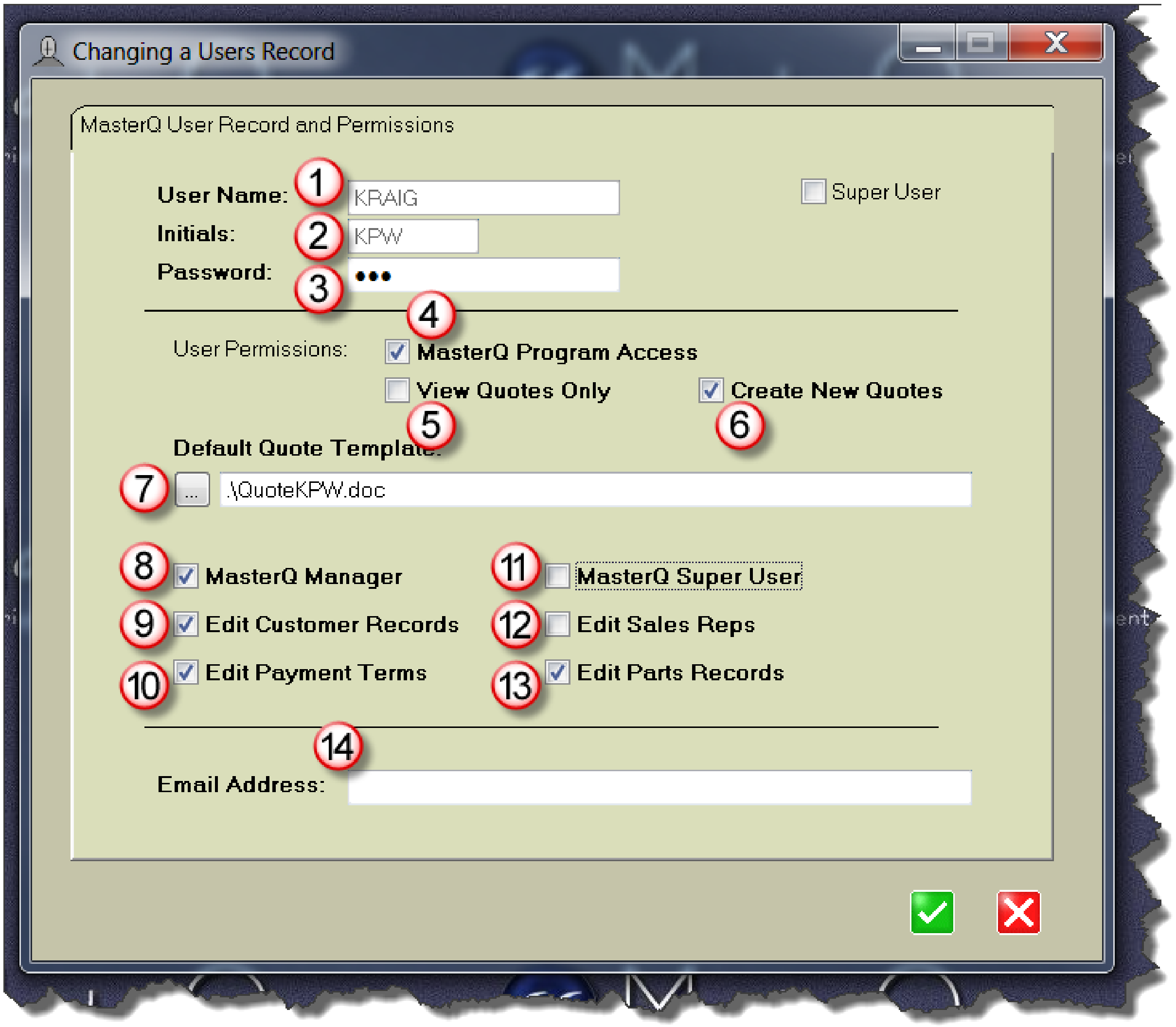
[Setting Up or Changing a User Record]

Setting Up or Changing a User Record

All Agenda Development software use the same data files, including the users. This means a password given to a user for access to MasterQ is the same password they would use to access NaftaBlaster or Targets. This also means that users of the Targets program will be listed in the Users list in MasterQ. Just because they appear in the list of users does not mean they have access to MasterQ.

This also means that you should not delete user records. This would also remove their ability to access other programs. Additionally, if the user record is removed, it may be difficult to understand *who* created a quote, issued an RGA, or created Nafta Certificate of Origins.

In the event an employee leaves your company, the best way to handle this is to un-check the appropriate boxes giving that user access.



1. **User Name** - Enter a unique name for this user. Up to twenty characters.

2. **Initials** - Enter a unique set of initials to identify this user. Up to three characters.

3. **Password** - This password will be used by this user to log into all Agenda Development programs. Up to 15 characters may be used. The password is case insensitive.

4. **MasterQ Program Access** - Allows this user to start the MasterQ program. Remember, you many have other Agenda Development programs. Not all users may have access to the MasterQ program.

5. **View Quotes Only** - Users with this box checked can start the MasterQ program and view quotes. They cannot create new quotes.

6. **Create New Quotes** - Check this box to enable users to create new quotes.

7. **Default Quote Template** - Each user *may* have a their own quote template used to generate quotes they create. If no entry is made here, the user will use the default quote template that was selected for the entire system.

8. **MasterQ Manager -** Check this box to enable the supervisory features in the program. If you are using MasterQ as a stand alone product on a single computer, this would be an appropriate choice for your account.

9. **Edit Customer Records -** Check this box to enable the user to create new customers.

10. **Edit Payment Terms** - Users with this box checked can create payment terms.

11. **MasterQSuper User** - Super users can modify many aspects of the program that are not enabled even for MasterQ managers. Super Users are able to modify things that perhaps should *not* be changed. Super users have no training wheels on their bicycles. Users who are designated Super Users see *all* notes, even those marked private. This may add to clutter on the displayed screens. We do not recommend making users "super users". Even you.

12. **Edit Sales Reps -** Check this box to enable the user to create and edit salesman records.

13. **Edit Part Records -** Checking this box allows the user to create and edit part records.

Next: [Customers Tab]

Customers Tab

The Customers tab lets you control the way MasterQ behaves when creating and displaying customer information.

1

New Customer Numbering: Manual
Checking the manual option requires you to enter a customer ID number for each customer. This is the best option to use if another software system uses customer ID numbers as long as you enter every prospective customer into that other software system before creating a quote for them.

NOTE: Even if you check off another type of option, you still have the ability to change the suggested customer ID numbers.

2

New Customer Numbering: Automatic
Check this option to enable additional options in the Automatic Numbering Mode.

Simple Numbering

3

This option uses digits and letters to create a customer code. This is a good option if your other systems do not use customer ID numbers.
MasterQ will *automatically* assign a customer number to each new account when this option is enabled. These account "numbers" actually may consist of letters and digits, although the letters "O" and "I" are not used to avoid being confused with one's and zero's. This numbering system is very efficient, even two character customer numbers can identify 1,089 unique customers. Three digits will handle 35,937 and if you need it, 4 characters would cover 1,185,921 customers.

Last Number Assigned
Each time a customer number is assigned, it's value is saved here. In the example above, the *next* customer ID number would be **AC**

New Customers Use PR prefix

4

This is a handy feature if your other software systems *do* assign customer ID numbers, but you choose not to enter *prospective* customers into that system until they become active. When the customer becomes a "real" customer by ordering and they are *then* added to your other system and assigned a permanent customer ID number, you will need to combine the two customer records into one. For more information, click here.

5

Warn When Other Customers are in the Same Zip Code
Checking this option will display other customers in the same zip code when you create a *new* customer record. This may be helpful in eliminating duplicate customer errors in some circumstances. It is more beneficial if you have a relatively small number of customers in each zip code... typical of a Business to Business model. It might be less beneficial to companies quoting to retail customers, especially when operating in a limited geographical area.

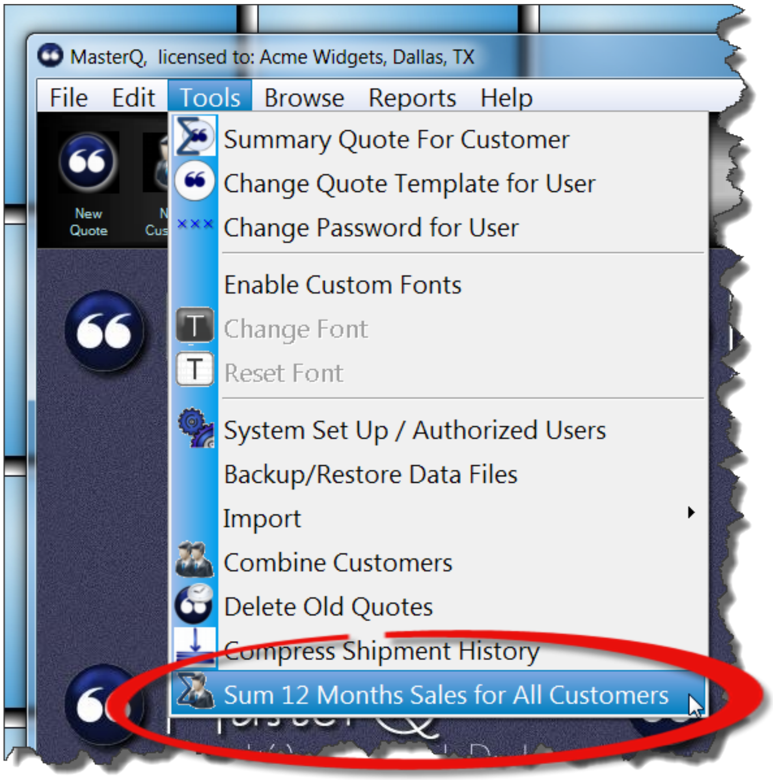
NOTE: You are not *prevented* from entering more than one customer in one zip code even if this option is selected.

6

Recalculate 12 Months Sales When Opening Customer Record
Checking this option will total up the last 12 months sales for a given customer every time you open their record. This insures that the 12 month previous sales number is always up to date. However, it may cause a slight delay when opening each customer record. The amount of the delay will depend on how many sales transactions each customer has as well as the speed of your computer and network.

If un-checked, the 12 months previous sales history is only updated when you specifically request it.

7



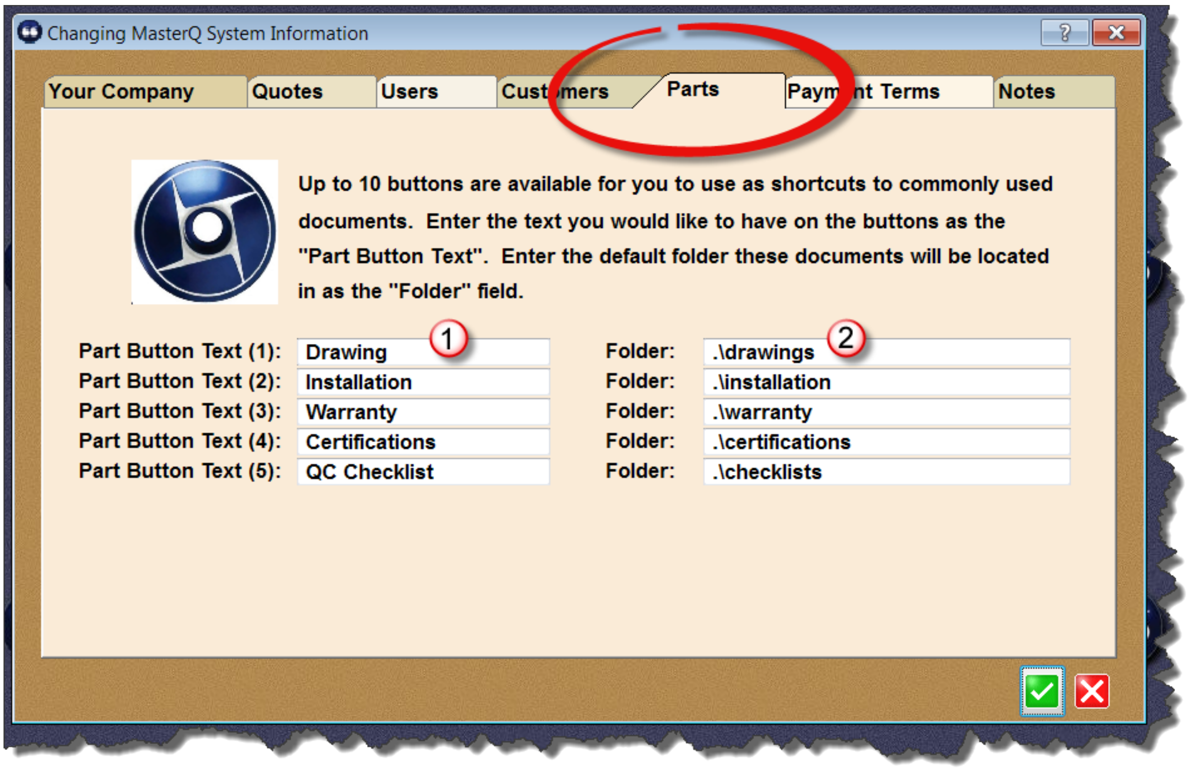
Next:

[Parts Tab](#)

Parts Tab

Five user defined buttons are available to attach documents to. Any type of file may be linked to these buttons. Examples: Word documents, PDF files, JPG image files, even sound files. These buttons make access to support documents quick and easy.

You may specify the description to appear on the buttons as well as the default folder location on the parts tab of the system record.



1

Part Button Text - Enter a description to appear on each button.

While you may change the description at a later time, this is generally not a good idea. Changing the button description will not clear the assignments you have made for each linked document. Imagine the confusion if a button that was once labeled "Drawing" were changed to "Job Instructions".

2

Folder - Identify the default location to store this type of document. To insure that the documents will be available to all users, be sure to use a folder under the folder where you have installed the program. (Typically, this would be located in a network folder.)

If you choose a folder located on your local computer's drive, the linked documents will not be found by users running the program from *their* computer.

TIP: You are not limited to saving a particular type of document in one folder. The folder you specify here is just the starting point whenever you are asked to point to a document file. As an example, you could choose to store sensitive information in the My Documents folder on your local computer. Other users would see the button, but when clicked, MasterQ would look in *their* My Documents folder for the specified file and would not find it. However, this can cause confusion and we do not recommend it.

TIP: Once you assign Button Text and your users start making entries, be careful changing the button text. If users have been using button one to point to drawings, and the button text is suddenly changed to something else, things can get confusing.

TIP: These same buttons are used for all Agenda Development programs.

TIP: It is strongly recommended that these folders reside in folders *below* the installation folder. This will insure that all networked users will be able to view all documents. Documents located in folders on your local PC, for example, would not be accessible by other users.

Next: Payment Terms

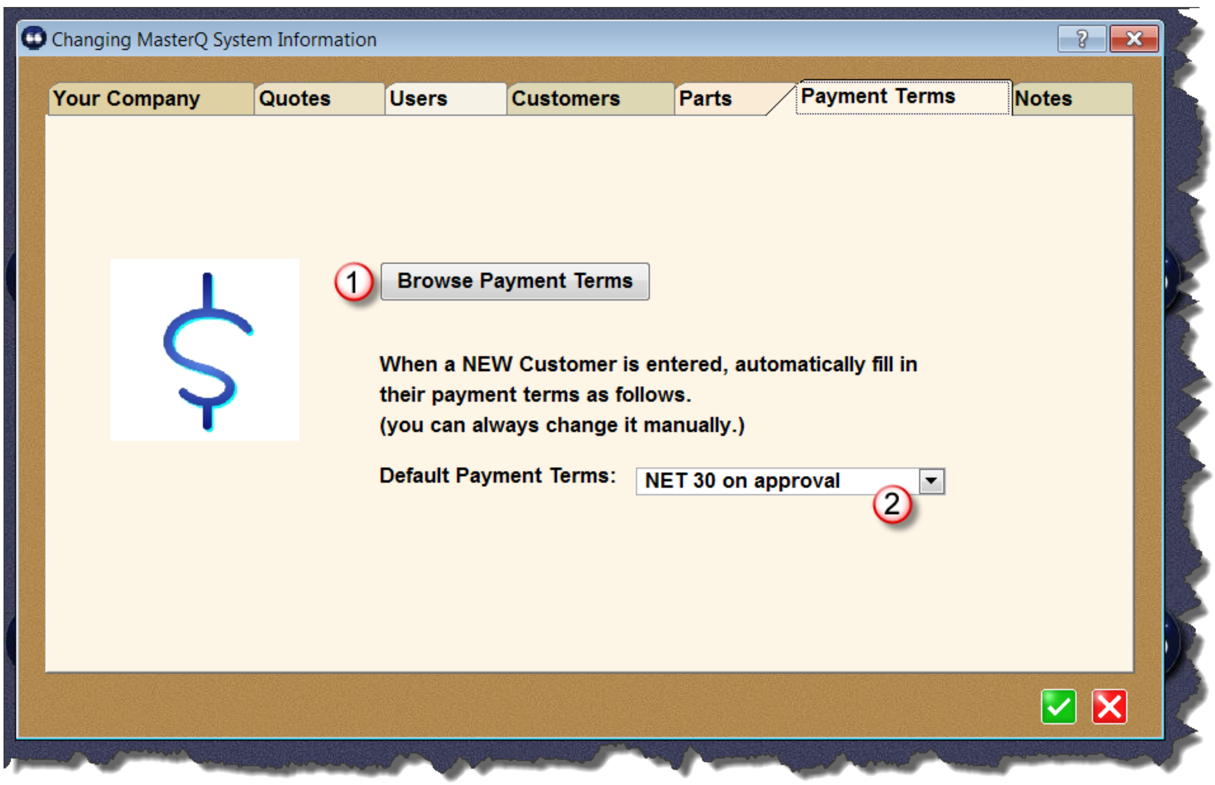
Payment Terms

The payment terms tab lets you set the default payment terms to assign to new customers. This is not the payment terms that you offer your existing customers most often. This should be the payment terms for *new* customers. Such as NET 30 on Approval.

1 **Browse Payment Terms** - This button will show you a list of all payment terms you have set up and will allow you to add additional payment terms.

2 **Default Payment Terms** - This drop down list allows you to select the payment terms you wish to use when setting up most new customers. You can always modify it for a specific customer or quote.

TIP: The default payment terms is *not* the terms you offer most often, such as NET 30. It should be the default terms to offer *new* customers.



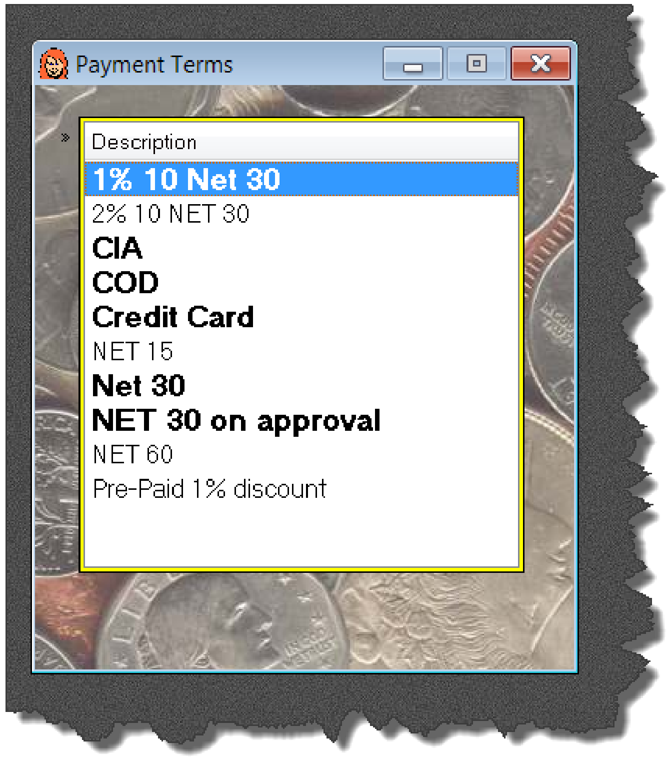
This might be a great time to make sure the payment terms you wish to offer are available.

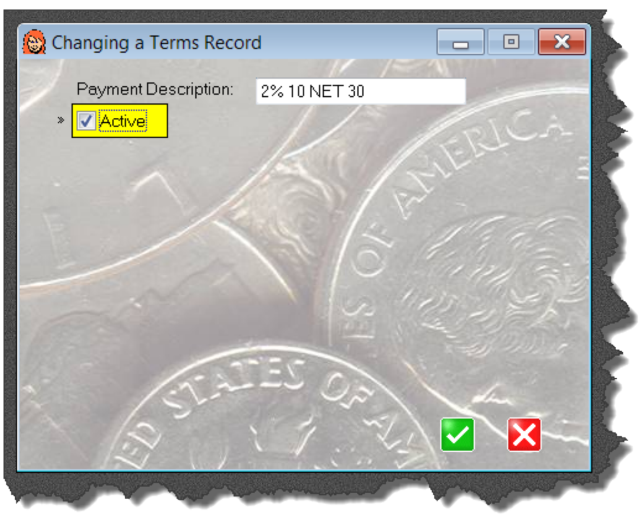
Next: Browsing Payment Terms

The payment terms are listed in alphabetical order. "Active" payment terms are ones that users can select from when creating a new customer or new quote. "Active" payment terms are shown in **bold** in this list for easy identification.

You can press your Insert, Delete or Enter keys to modify this list.

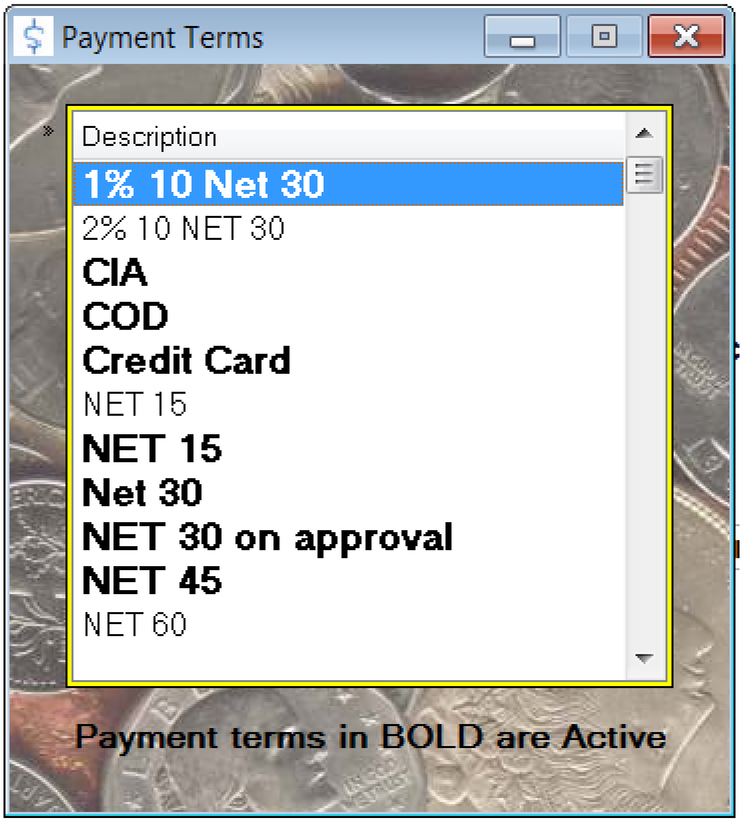
"Active" terms are shown in **bold**. (see below)





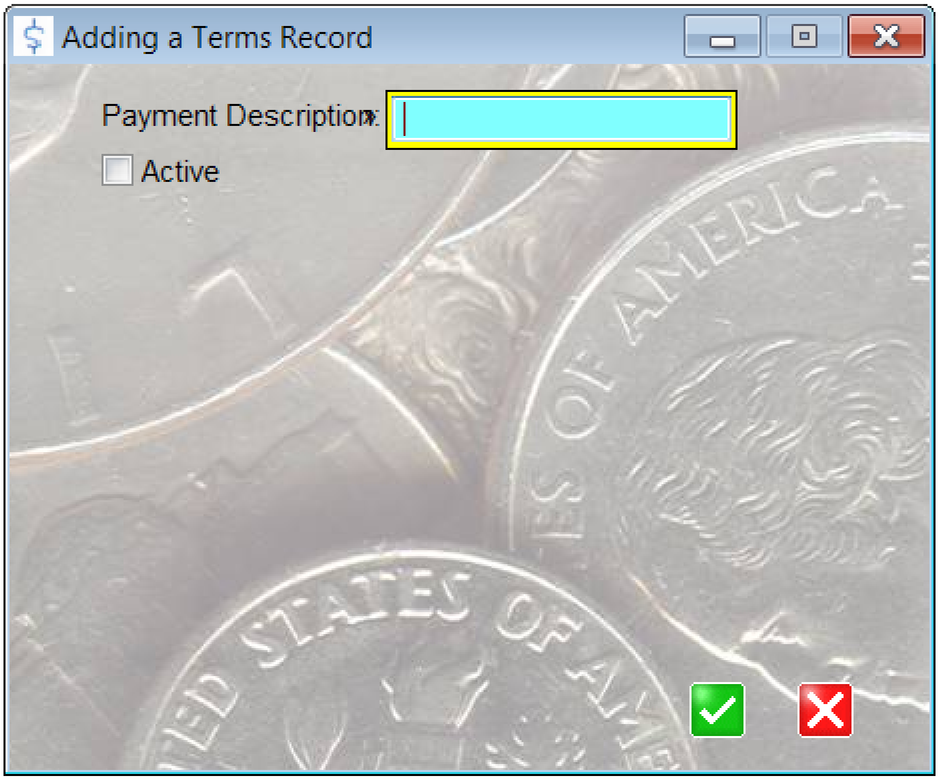
After entering a description, check the Active box to make this payment term option available when creating a new customer or issuing a quote.

Press the green check box to save the new or modified payment term.



The payment terms list shows all payment terms you have created. Payment terms can be active or inactive (perhaps you want to offer special NET 90 terms at certain times of the year). Active payment terms are shown in **bold**. When creating a quote, the user may only select from payment terms that are active.

You may add additional terms by pressing the insert button or right clicking the list and selecting Insert.



Give the payment term a unique description and check the Active box to let users select this payment option for quotes.

Next:

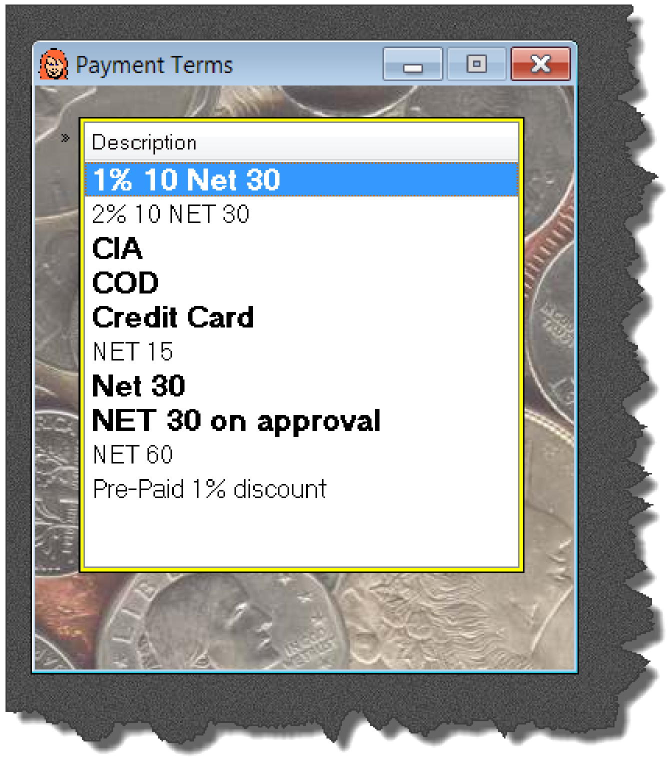
[Notes (Documentation) Tab]

Browsing Payment Terms

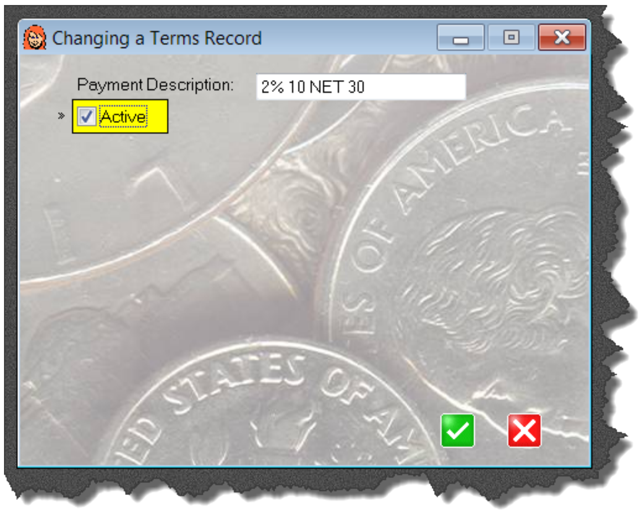
The payment terms are listed in alphabetical order. "Active" payment terms are ones that users can select from when creating a new customer or new quote. "Active" payment terms are shown in **bold** in this list for easy identification.

You can press your Insert, Delete or Enter keys to modify this list.

"Active" terms are shown in **bold**. (see below)



Next: [Creating or Changing Payment Terms]
or
Next: [Notes Tab]



After entering a description, check the Active box to make this payment term option available when creating a new customer or issuing a quote.

Press the green check box to save the new or modified payment term.

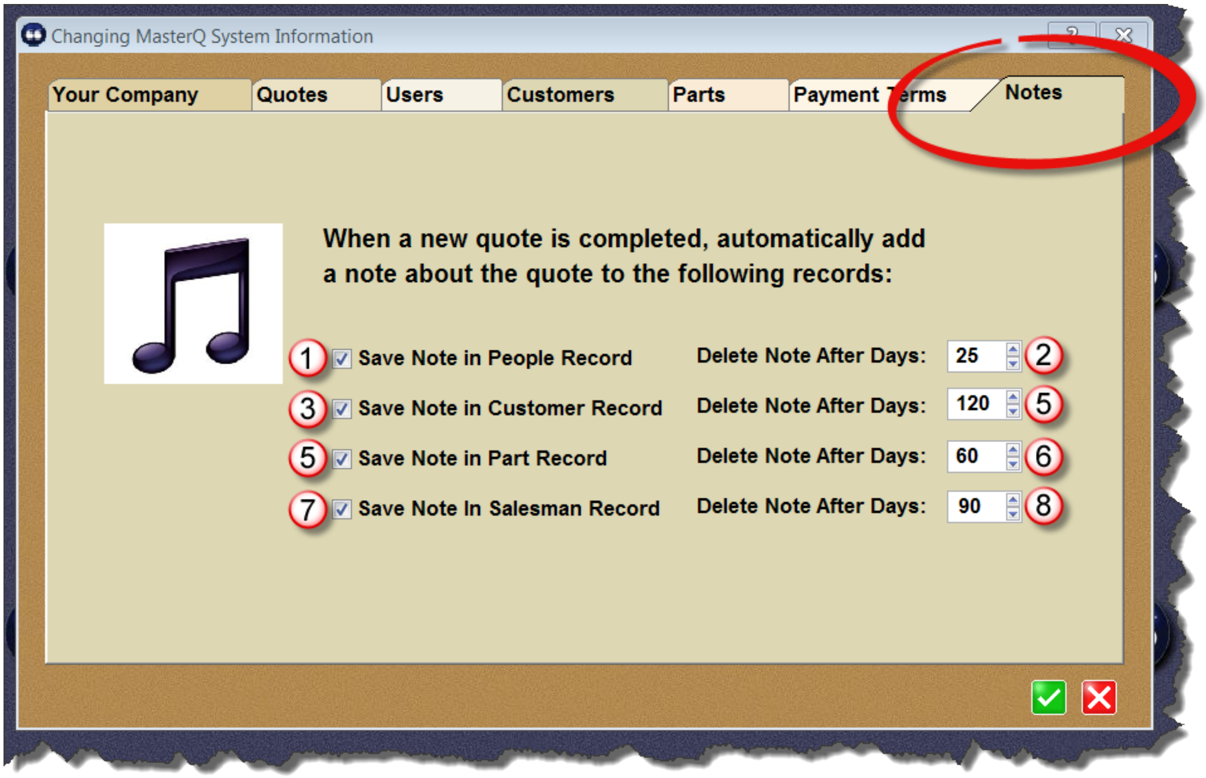
Notes Tab

Each time a quote is created, MasterQ has the opportunity to automatically create a note about the quote and attach it to the People, Customer, Part and/or Salesman records. Each of these notes include a button that will quickly open up the related quote for review. The Notes Tab controls which notes are created and how long they are kept before being automatically deleted.

NOTE: When a quote is created a Word document is created and saved in the customer's folder. (located in the folder where MasterQ is installed, in a sub-folder named "correspondence" in a sub-sub-folder named with the customer's number. Created notes include a link to open this document quickly.

Not only are quotes saved in the customer's folder, other documents created by Agenda Development programs are also saved in this location. Keeping NAFTA forms, RGA documents and other correspondence in this common folder makes them readily available from the customer record. You may wish to keep other documents you create using other software in this same folder.

TIP: When the notes are automatically deleted, the document is <u>not</u> deleted. Only the note *about* the document is removed.



1. **Save Note in People Record** - Creates a note each time a quote is created and attaches the note to the record of the *person* whom the quote was created for. The note will contain a View Related File button that can instantly call up the document for review.

2. **Delete Note After Days** - To keep your files from filling up with old notes, you can specify how many days to retain the note after creation. After that date, the note will be scheduled for deletion. Deleting the *note* does not delete the actual quote, just the note about it.

3. **Save Note in Customer Record** - Creates a note each time a quote is created and attaches the note to the record of the *customer* whom the quote was created for.

4. **Delete Note After Days** - To keep your files from filling up with old notes, you can specify how many days to retain the note after creation. After that date, the note will be scheduled for deletion. Deleting the *note* does not delete the actual quote, just the note about it.

5. **Save Note in Part Record** - Creates a note each time a quote is created and attaches the note to the related *part* record of each part that was included in the quote.

6. **Delete Note After Days** - To keep your files from filling up with old notes, you can specify how many days to retain the note after creation. After that date, the note will be scheduled for deletion. Deleting the *note* does not delete the actual quote, just the note about it.

7. **Save Note in Salesman Record** - Creates a note each time a quote is created and attaches the note to the record of the *salesman* who is linked to the customer.

8. **Delete Note After Days** - To keep your files from filling up with old notes, you can specify how many days to retain the note after creation. After that date, the note will be scheduled for deletion. Deleting the *note* does not delete the actual quote, just the note about it.

TIP: The Delete After days you specify here are used as the default delete date. You may change the actual delete date for any note you create.

The Customer Database

Your customer database will contain information about each customer. Aside from the usual company name, address, phone, and fax information, the customer database can contain a great deal of valuable information.

Your customer record can include:

- Salesman for the account
- A link to the customer's web site,
- Payment terms
- Last quote date
- Last sales date
- List of all items quoted and prices
- Customer's part numbers
- Ship Via information
- Shipment history information
- One button access to *all* correspondence you've had with this customer, even those created in other programs
- Current Open Orders (requires MasterQ-ENT)
- Scheduled Drip Marketing Steps (requires MasterQ-ENT)
- a list of Contacts (People) at the customer

The same customer file is utilized by all Agenda Development software. Some of the entry fields shown in the screen shots in this manual maybe different than what you see on your screen, depending upon which other programs you have installed.

When you change the customer record for MasterQ program, you are also changing the information for all other programs.

TIP: Some of the entries you can make in the customer database appear identical to entries in the System record. The Ship Via field is an example. You may enter a Ship Via instruction in both the System and Customer records. You may even add a different ship via for a *person* at the customer.

When creating a new quote, MasterQ will *assume* you will use the default Ship Via you specified in the System set up, but you can over ride this and use a different Ship Via for any customer you wish. When you identify a new person at the customer, MasterQ will use the Ship Via you specified *for this customer*, but if none exists, it will use the default from the System record.

When a new quote is being created, MasterQ will look for the ship via specified in the person's record. If no entry exists there, it will look in the ship via specified in the customer record. Failing that, it will use the ship via you have specified as the default in the System record.

If an entry is made in the System record, it will be used any time a Ship Via entry is needed. For example, when you create a *new* customer, the Ship Via entry will be pre-filled for you with the Ship Via value you saved in the system record.

For customers with unique ship via instructions, enter or change them in that single customer's record.

Before you get started

There are some options that may be set to make MasterQ work the way *you* want it to. These options are set in the System record. You can see how this is done here.

Next: Adding Customer Records

Setting Customer Options

The customer tab in the system record is used to set the way MasterQ behaves when working with your customers.

First, keep in mind that you do not <u>have to be</u> concerned about numbering your customers. MasterQ will work just fine allowing you to select customers by using their name. It's easy to remember and almost as quick as using customer numbers.

If you don't use customer ID numbers in other programs, we recommend option 3 below. But please continue reading. This won't take long.

If you do use another program which assigns customer ID numbers, we strongly recommend you use the same numbering system in MasterQ. It will make life easier in the long run.

Selecting the Customer Numbering Method

The method of assigning customer numbers is set in the System record. To change the system record, select Tools- System Setup / Authorized Users from the main menu. NOTE: Your user account must be designated as a MasterQ Manager or SuperUser to edit the system record.

1 **New Customer Numbering: Manual**
Checking the manual option requires you to enter a customer ID number for each customer. This is the best option to use if another software system uses customer ID numbers as long as you enter every prospective customer into that other software system before creating a quote for them.

NOTE: Even if you check off another type of option, you still have the ability to change the suggested customer ID numbers.

2 **New Customer Numbering: Automatic**
Check this option to enable additional options in the Automatic Numbering Mode.

Simple Numbering
3 This option uses digits and letters to create a customer code. This is a good option if your other systems do not use customer ID numbers.
MasterQ will automatically assign a customer number to each new account when this option is selected. These account "numbers" actually consist of letters and digits, although the letters "O" and "I" are not used to avoide being confused with one's and zero's. This numbering system is

very efficient, even two character customer numbers can cover 1,089 customers. Three digits will handle 35,937 and if you need it, 4 characters would cover 1,185,921 customers.

Last Number Assigned

Each time a customer number is assigned, it's value is saved here. In the example above, the
4 *next* customer ID number would be **AC**

New Customers Use PR prefix

This is a handy feature if your other software systems *do* assign customer ID numbers, but you
choose not to enter prospective customers into that system until they become active. When the
5 customer becomes a "real" customer by ordering and they are *then* added to your other system
and assigned a permanent customer ID number, you will need to combine the two customer
records into one. For more information, click here.

Warn When Other Customers are in the Same Zip Code

Checking this option will display other customers in the same zip code when you create a *new* customer record. This may be helpful in eliminating duplicate customer errors in some circumstances. It is more beneficial if you have a relatively small number of customers in each zip code... typical of a Business to Business model. It might be less beneficial to companies quoting to retail customers, especially in a limited geographical area.

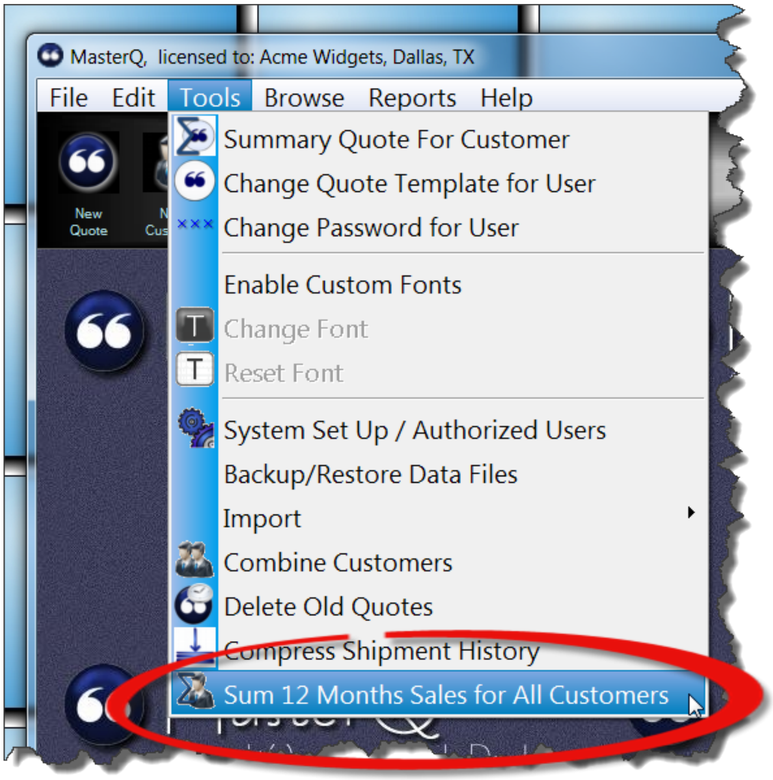
6

NOTE: You are not prevented from entering more than one customer in one zip code even if this option is selected.

Recalculate 12 Months Sales When Opening Customer Record

Checking this option will total up the last 12 months sales for a given customer every time you open their record. This insures that the 12 month previous sales number is always up to date. However, it may cause a slight delay when opening each customer record. The amount of the delay will depend on how many sales transactions each customer has as well as the speed of your computer and network.

If un-checked, the 12 months previous sales history is only updated when you specifically
7 request it.


MasterQ, licensed to: Acme Widgets, Dallas, TX
File Edit Tools Browse Reports Help
New Quote
Summary Quote For Customer
Change Quote Template for User
Change Password for User
Enable Custom Fonts
Change Font
Reset Font
System Set Up / Authorized Users
Backup/Restore Data Files
Import
Combine Customers
Delete Old Quotes
Compress Shipment History
Sum 12 Months Sales for All Customers

Adding Customer Records

Customer records may be added to your database in a number of ways.

Customer records can be created in one of three ways:

1. You may create customer records directly, one at a time. This is a fine way to add a customer on occasion. Click here to see how.

2. If you have an existing customer database and can export data into a comma separated value format (CSV), you can quickly (and accurately) import them into MasterQ. For more information see Importing Customer Data.

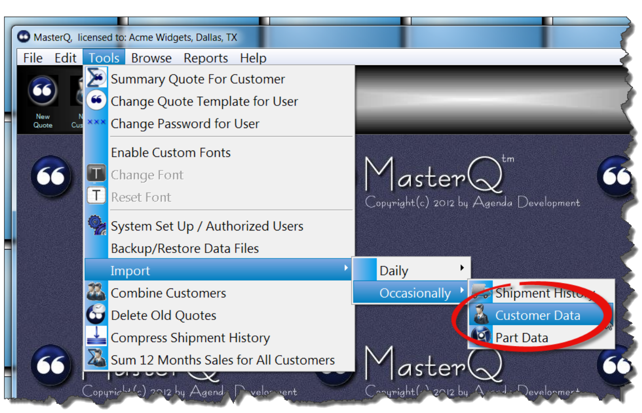
3. Using MasterQ-PRO or MasterQ-ENT you may optionally import your sales history into the program. Doing this offers many additional benefits. During the import process, customer records that do not already exist will be created automatically.

Depending on how many customers you currently deal with, it may be easiest to import your customer data from another program where this information already exists. Of course, this assumes you *have* another system with this information and that the other program has the ability to export customer data.

If you can't export data from another system, you can still create customer records manually or just do them one at a time as quote requests are handled. But having all of your customers entered into MasterQ has advantages. Once your customers are set up and your shipment history has been imported, MasterQ will be able to show you who else purchases a particular part and who you have previously quoted.

Customer names do not need to be unique, but each customer will need a unique customer number. MasterQ can assign these numbers for you automatically or you can use the same customer numbers as in your other system (that you are exporting from). For more information on telling MasterQ how to use and assign your customer numbers click here.

TIP: If your other software uses customer numbers, we strongly recommend using the same numbering system. If your other software does not use customer numbers, we recommend letting MasterQ assign numbers for you automatically.



Customer information may be quickly imported into MasterQ and other Agenda Development programs using the **TOOLS| IMPORT|OCCASIONALLY| CUSTOMER DATA** commands from the main menu.

General Considerations for Customer Data Import

Each customer record that you import must have a unique customer number assigned by the exporting program. You can read more about creating customer number here: Assigning customer numbers

If your exporting program does not use customer ID numbers, you are not able to import directly into MasterQ.

The customer data CSV file may contain the following information. Only the customer name & number are required, but adding additional information will save time later. Commas must separate each item, even if the item is not included in your export file.

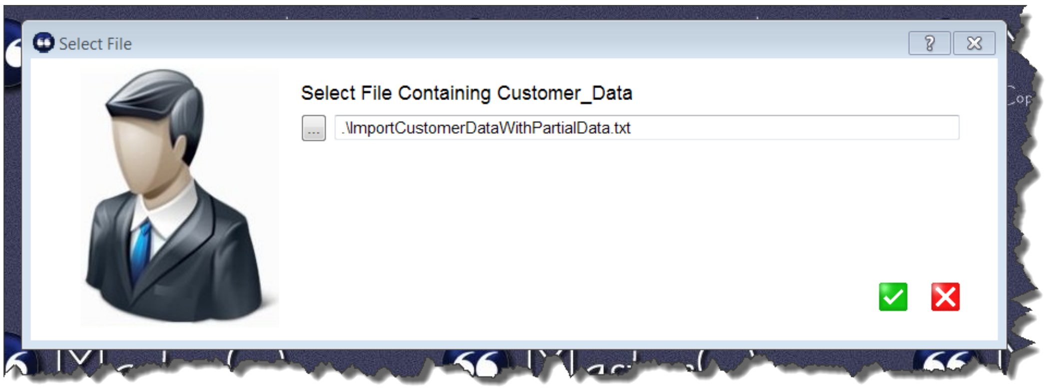
Customer number	Up to 10 numbers or letters
Customer name	
First address line	
Second address line	
City	
State	
Zip or Postal code	
Phone area code	
Phone number	
Fax area code	
Fax number	
Customer's payment terms	
Customer's ship via	
Delivery day	
Credit Status	
Tax ID Number	

A typical line in your import file might look like this:

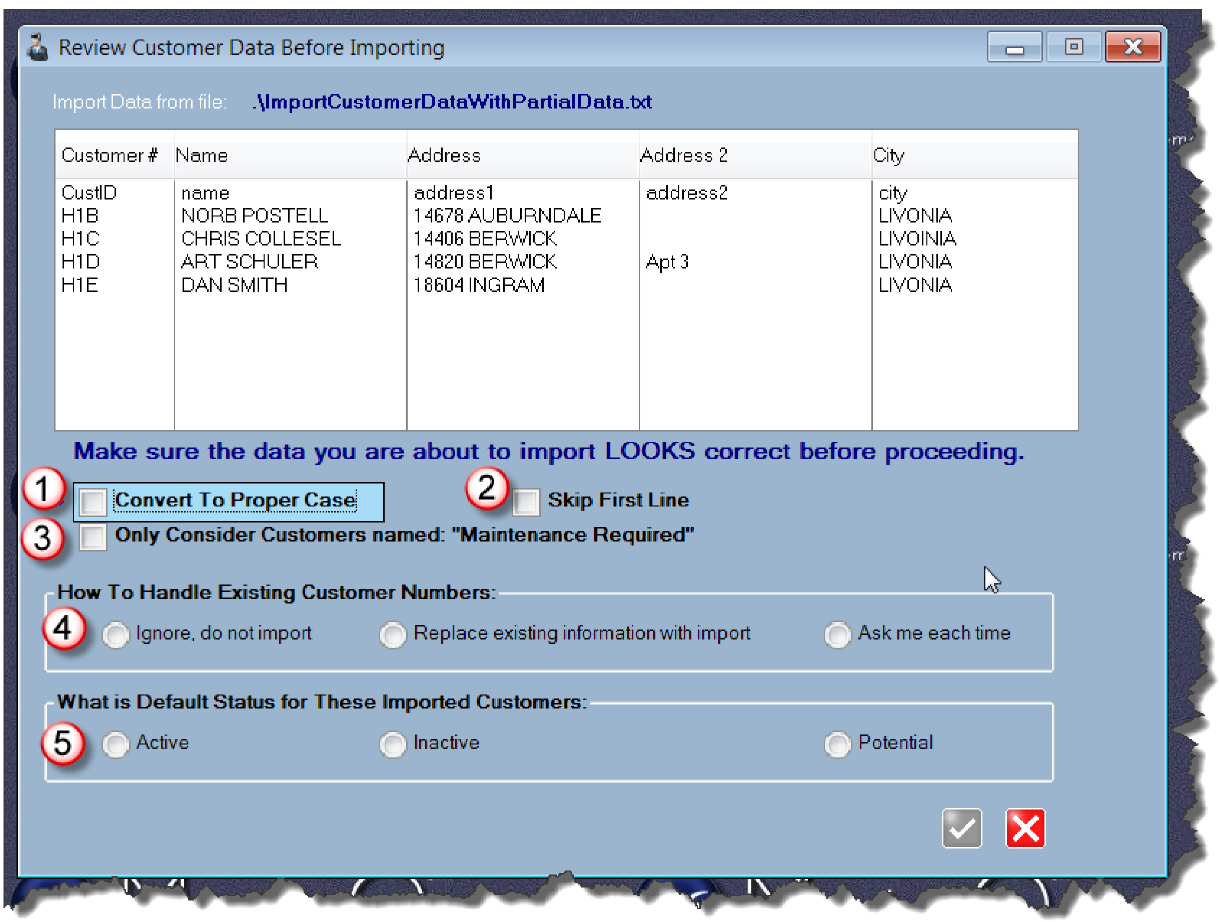
A1, Bobs Welding,11 First St, Suite B, Livonia, MI, 48154, 313, 5551212, 313, 5551213, NET 30, Our truck, Tuesday, 7777778

If you choose not to include some information, be sure to leave the commas in position. For example, to import Bobs Welding but skipping phone numbers, your line might look like this:
A1, Bobs Welding,11 First St, Suite B, Livonia, MI, 48154, , , , , NET 30, Our truck, Tuesday, 7777778

After you choose the Import Customer Data command, you will be asked to confirm which file is being imported:



Once you have selected the file containing the data to import, the following confirmation screen will be displayed:



1 **Convert to Proper Case**
Check this box to convert a name like SMITH to Smith automatically.

2 **Skip First Line**
If the first line of the import file contains *descriptions* rather than actual data (like the example pictured above) you can check this box to skip the first line.

3 **Only Consider Customers named "Maintenance Required"**
When orders are imported for a customer ID that does not exist in MasterQ, a customer record is created with a customer name of "Maintenance Required". Checking this box will *only* update these new customers regardless of the other records in the import file.

4 **How To Handle Existing Customer Numbers**
If a customer ID number already exists in your customer database you can choose what happens during the import process.
1) Ignore, do not import anything for an existing customer
2) Replace existing information with the data in the import file
3) Ask each time - will present you with the two records and ask you which one should be used.

5 **Customer Status**
Each customer has a status of Active, Inactive, Prospect or Not Customer (example, a vendor). You can set the status of these imported customers by selecting an option here.

TIP: The OK button is disabled until all options have been set.

Information about your customers is kept in a special database. Once a customer is in this system, you may easily select the customer when creating a quote and all relevant information will be copied into the document. (of course, you can change it if you need to)

This same database is used by other Agenda Development programs when issuing RGAs or creating NAFTA documents.

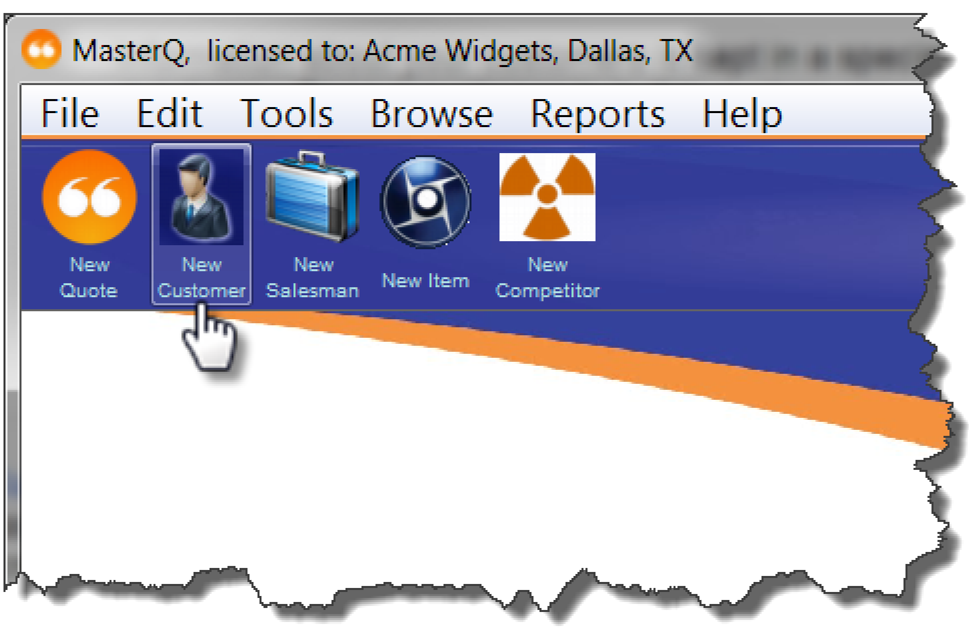
Who can create a Customer record?

To create or change a customer record your user account must have the Edit Customer Records option box checked, or your user record must show that you are a super user of MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)

You can watch a video showing how to add a customer and explaining some of the key features here: Adding New Customer Video

Creating a Customer record

The easiest way to add a new customer record is to press the shortcut button at the top of the MasterQ window.



But you may also create a new customer record from the Customer list. Use the command BROWSE| CUSTOMERS from the main menu. Then press the Insert key, or right click the customer list and select Insert.

Next: Creating a New Customer Record

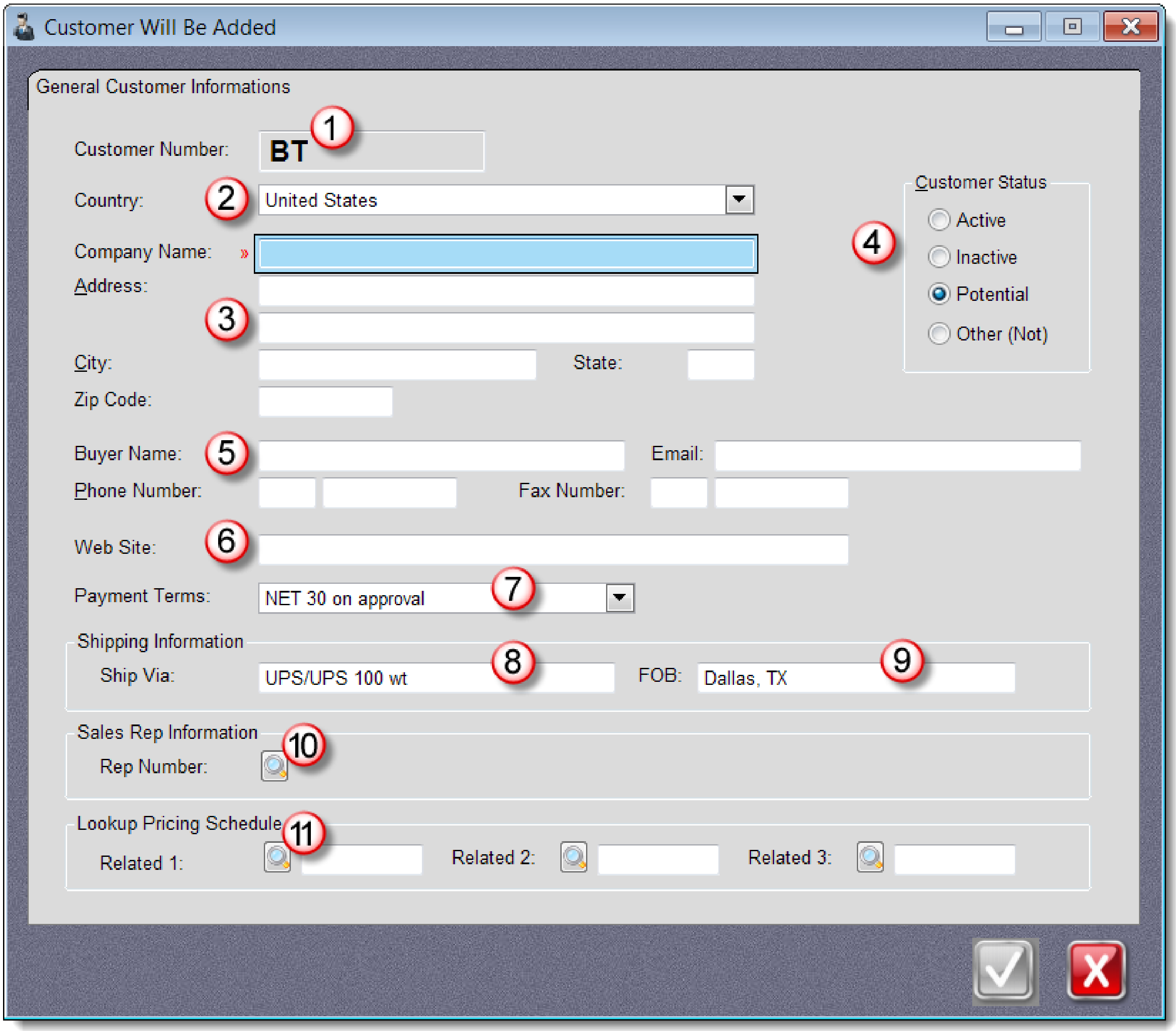
Creating a New Customer Record

Information about your customers is kept in a special database. Once a customer is in this system, you may easily select the customer when creating a quote and all relevant information will be copied into the document. (of course, you can change it if you need to)

This same information is used by other Agenda Development programs to process & track customer returns and to create NAFTA documents.

Who can create or change a Customer record?

To create or change a customer record your user account must have the Edit Customer Records option box checked, or your user record must show that you are a super user or a MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)



1	**Customer Number** - depending on the options you have set, MasterQ may set the customer number for you automatically. You may change this number if you choose.
2	**Country -** Select the country for this customer. Setting this may change the layout somewhat. (eg - zip code becomes postal code, etc.)
3	**Company Information: Name, Address, City, State, Zipcode** - or customer name if you sell to individuals. This is the default address information that will be applied to all new quotes and contacts. Of course you can modify it later. TIP: Enter the zip code and MasterQ will fill in the city and state. TIP: To avoid duplicate customers, it may be helpful to recognize other customers you have dealt with in the same area.

4	**Customer Status -** This is entry is used for filtering the list of customers you create. When creating new quotes, customers marked as OTHER (not customer) are not displayed.
5	**Default Buyers Name & Contact Information** - Quotes will default to this person, but you can select from anyone else you know at the customer. Of course, you can add new names too.
6	**Web Site -** Enter the customer's web site here. This will enable the Web button on the view customer form allowing you to jump to their web site with one button click.
7	**Payment Terms** - Select from any of the payment terms you have set up. The entry you specified as the system default payment terms when you set up the system record will be pre-filled for you when creating new customers.
8	**Ship Via** - The default Ship Via you specified in the System file is used when you create a new customer, but of course it can be changed. Your quotes do not need to include ship via information if this is not applicable to your business model.
9	**FOB** - The default FOB you specified in the System file is used when you set up a new customer, but of course it can be changed.
10	**Sales Rep** - Press this button to select a salesperson from the list of sales people you have set up.
11	**Look Up Pricing** - You may enter up to three related companies for this customer. Parent or related companies for example. When a quote is created, MasterQ will check to see if the current customer has purchased or has been quoted on the part you are quoting. MasterQ will then check each of these three related companies and tell you if any of them have purchased or have been quoted. See some clever applications of look up pricing here.

Next: Changing an Existing Customer Record

Look Up Pricing

Have you ever quoted a different price to a customer who is already purchasing your product? It's a no-win situation. Quote a higher price and you'll get hammered. Quote a lower price and... well, you still get hammered, don't you?

MasterQ includes a clever feature that will tell you if a customer has purchased an item before or if the customer has been quoted an item previously.

But MasterQ actually can go further than that. You can enter up to three related customer numbers for each customer. When an item is quoted, MasterQ will check *their* records and warn you if you have quoted or sold an item to them and tell you what price was used and when.

You can be clever with this feature, too. Set up a customer with an ID of 'Retail' or 'OEM' or 'Distributor' or any other descriptive name you wish. Create a quote for that "customer" for all of your parts. (Tip: You may consider using the Summary Quote feature to build this quote)

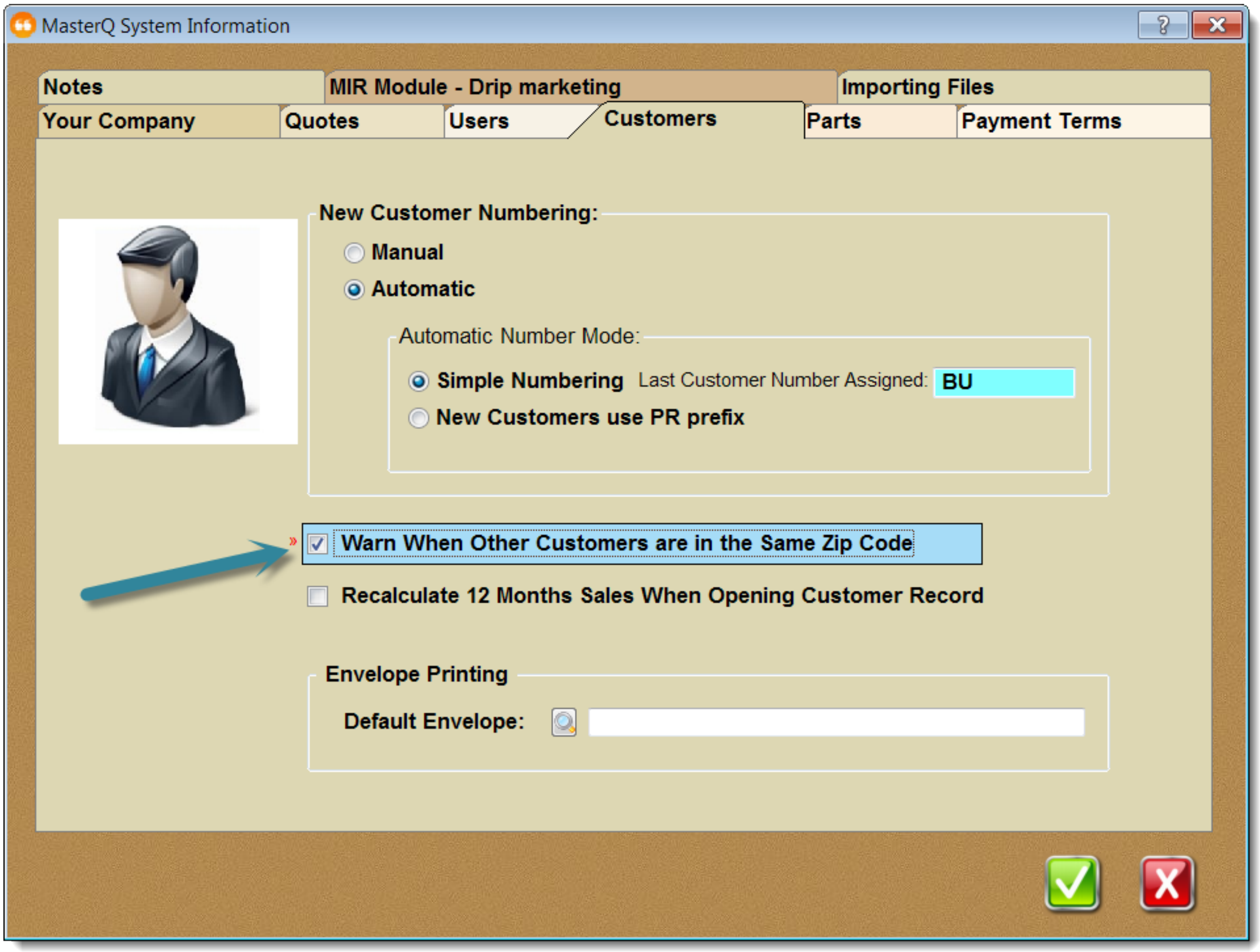
Then put the newly created customer ID in as a related look up. Any time you quote a customer who is identified as "OEM", a message will pop up showing you the current "OEM" pricing for the item.

Customers In the Same Zip Code

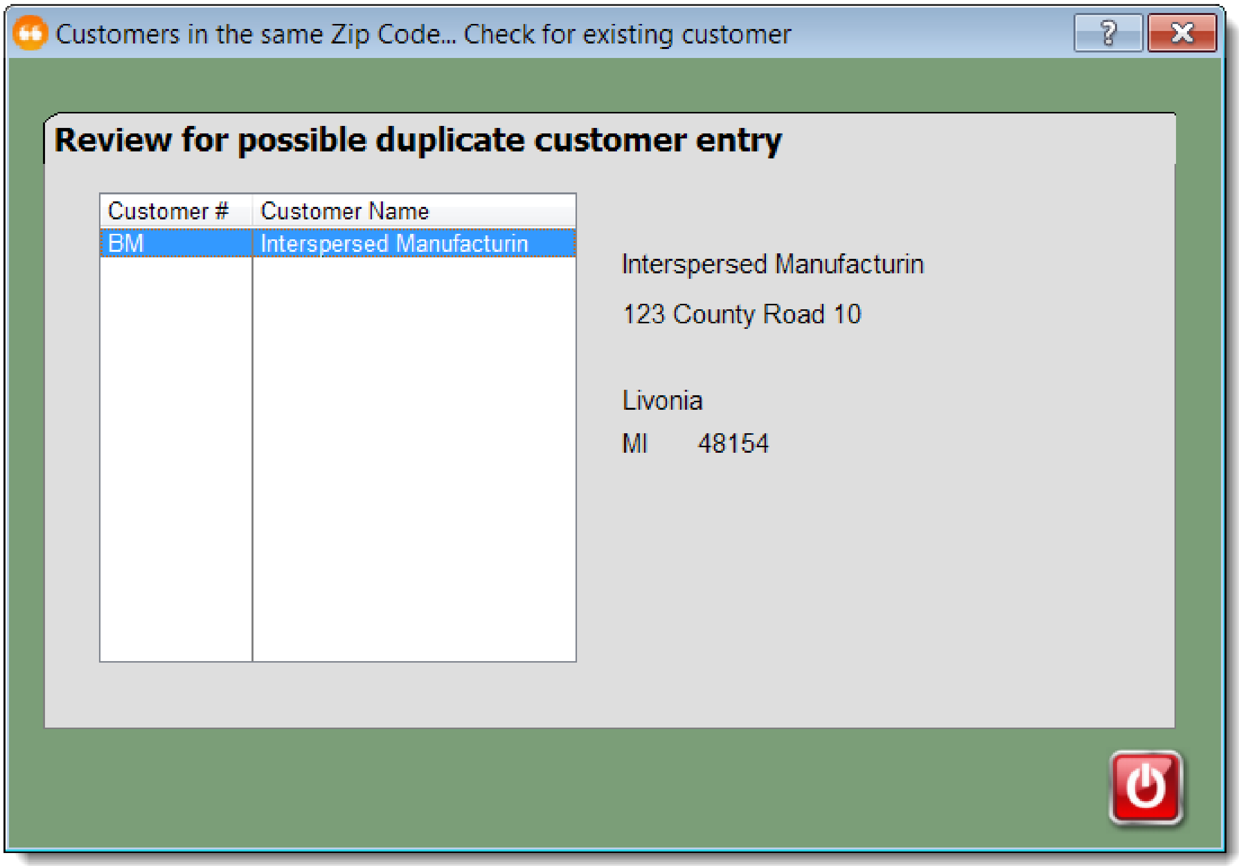
In some circumstances, it may be of interest to know if you have other customers in the same zip code as the customer you are creating. MasterQ can do this for you automatically.

Use the **TOOLS | SYSTEM SET UP** command on the main menu. (Your user account must be authorized as a super user or manager to access this command.)

On the Customers tab, check the "Warn When Other Customers are in the Same Zip Code" option.



When you set up a new customer, MasterQ will check for other customers in that zip code. If any are found, they will be displayed in a list for your review:


Customers in the same Zip Code... Check for existing customer
Review for possible duplicate customer entry
Customer #
Customer Name
BM
Interspersed Manufacturin
Interspersed Manufacturin
123 County Road 10
Livonia
MI 48154

Changing an Existing Customer Record

Once a customer record has been set up, you have more options available.

Who can change a Customer record?

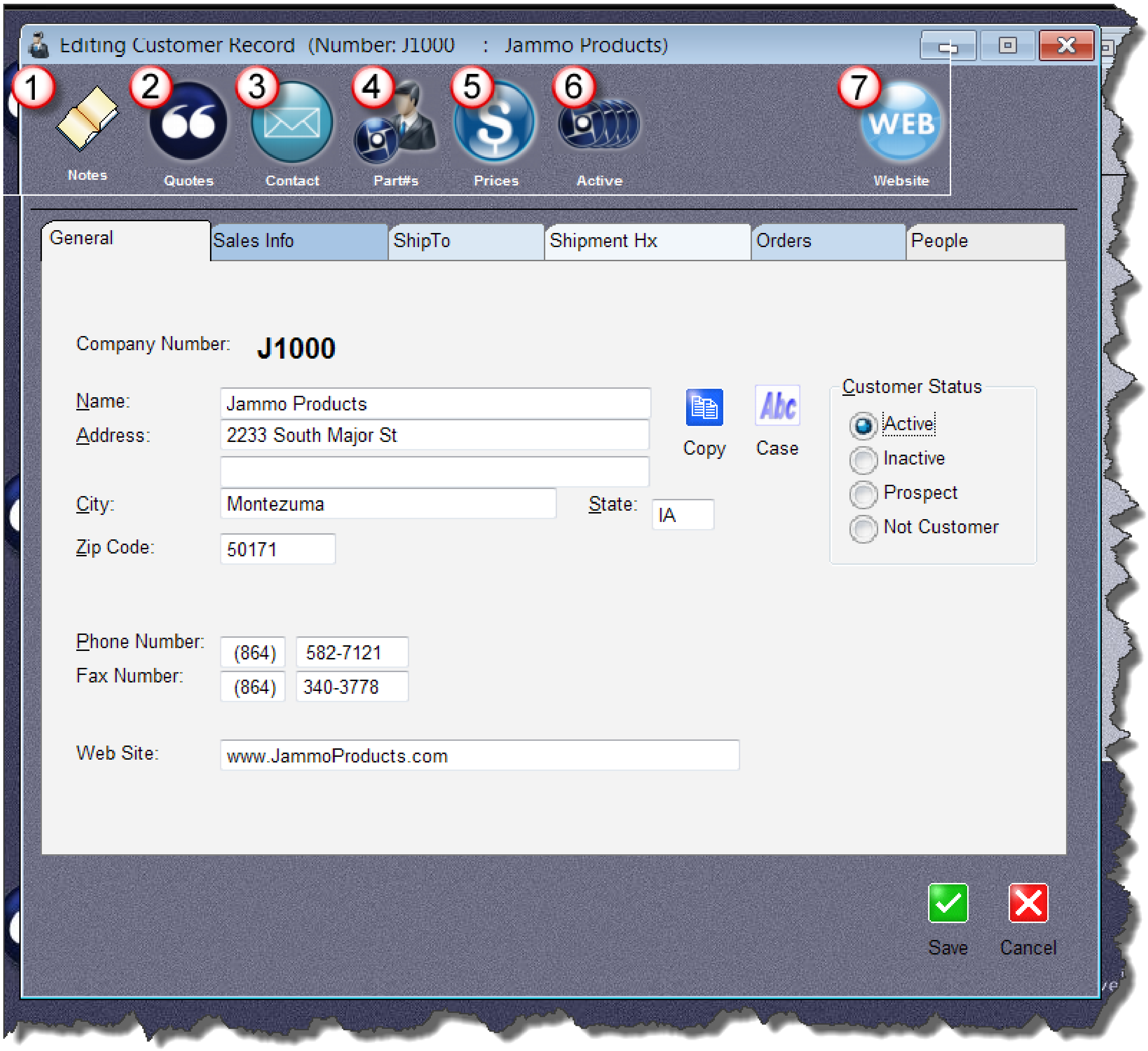
To change a customer record your user account must have the Edit Customer Records option box checked, or your user record must show that you are a super user or MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)

Changing a Customer record

From the main menu, select BROWSE|CUSTOMERS. Highlight the customer you wish to modify and double click or press the enter key to call up the customer's record.

Browse tables in MasterQ and all other Agenda Development programs include many features to help you sort, filter and locate a specific item. Click here for more information.

General Tab



1

Notes
The notes button displays a list of all notes about this customer. An open book indicates there *are* notes for this customer. A closed book means there are no notes to view.

2

Quotes
The quotes button displays a list of all quotes that have been created for this customer.

3

Contact
All quotes created for a customer are stored in a folder named with the customer's ID number. Other Agenda Development programs will also store created files in this folder. You are encouraged to save other general correspondence created outside of the Agenda Development programs in this folder also for easy access. Pressing this button displays the customer's folder.

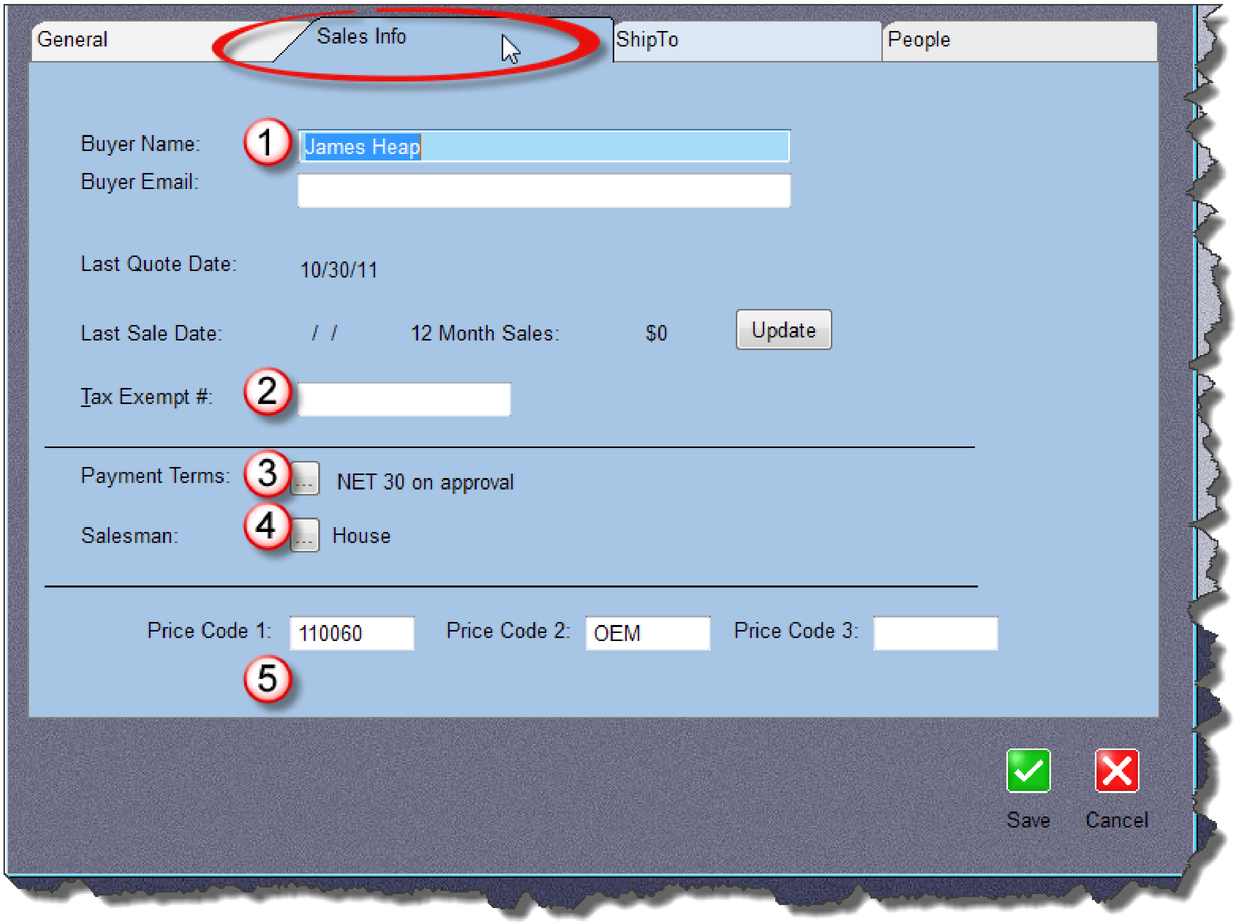
4 **Part#**s
MasterQ-Pro enables you to add customer part numbers to your quotes and other documents. This button displays a list of cross references between your item numbers and the numbers your customer uses.

5 **Prices**
While MasterQ will tell you if a customer has purchased or has been previously

6 **Active Parts**
Displays a list of parts that are purchased by this customer along with the most recent sales date

7 **Website**
Opens your web browser and goes to the customer's web site. TIP: This button is only enabled if an entry has been made for the customer's web site on the General tab.

Sales Tab



1 **Buyer Name**
This is the *default* buyer's name that will be inserted into new quotes. You can, of course, select a different name to address the quote to.

2 **Tax Exempt Number**

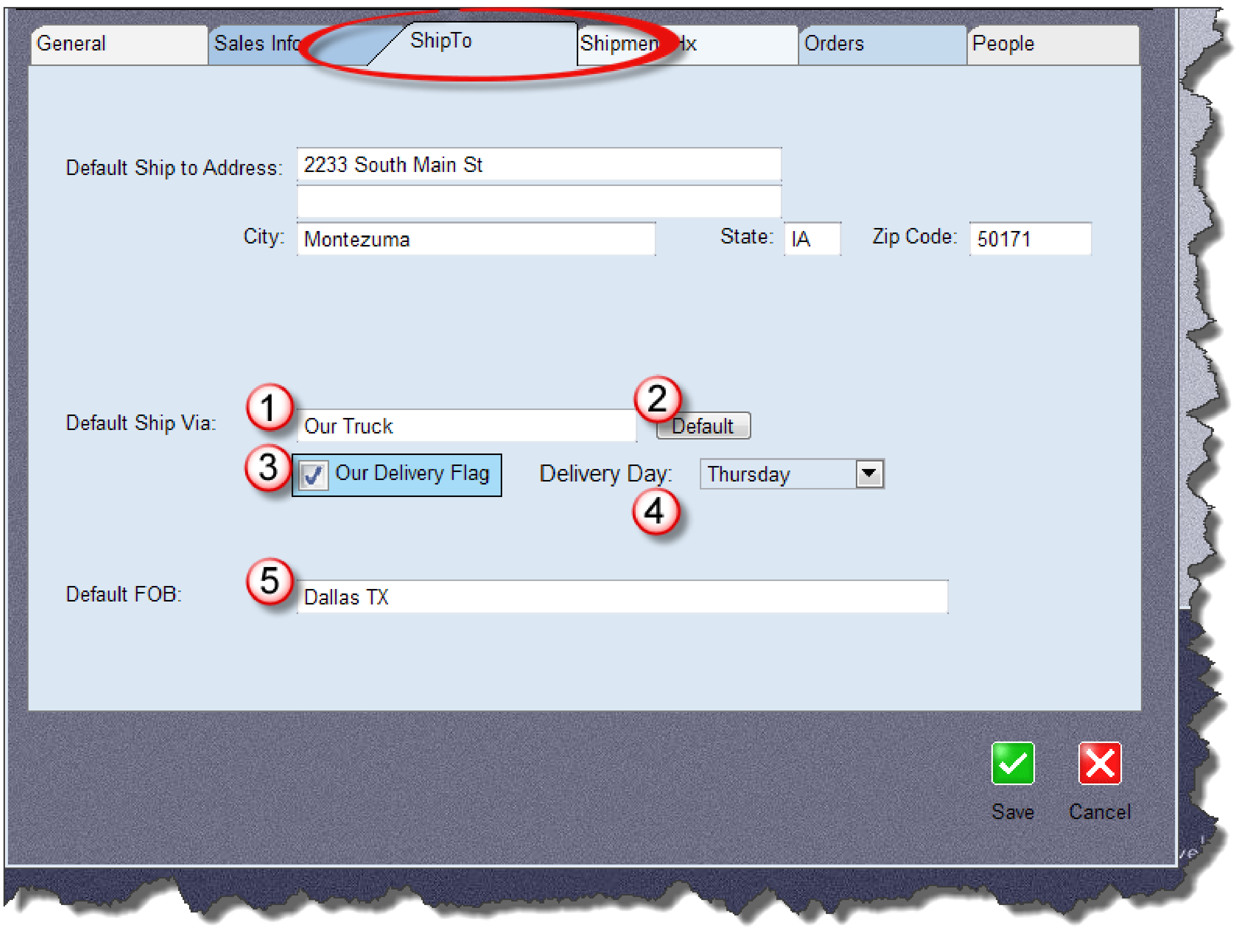
3 **Payment Terms**
Displays a list of active payment terms for you to select from. For information on creating payment terms, click here.

4 **Salesman**
Displays a list of active salesmen for you to select from. For information on creating salesmen, click here.

5 **Price Code Lookups**
Up to three alternate customer numbers can be entered in these fields. When items are quoted, MasterQ will check each of these accounts in order and warn if any of these customers has purchased or has been quoted the item.

TIP: In addition to simply identifying related customers here, you can create a phantom customer account to be used for general pricing. An example might be OEM, DIST, or SMALLOEM.

ShipTo Tab



Default Ship Via

Enter the default shipping method to apply on quotes to *this* customer. If no entry is made here, MasterQ will use the shipping method you set as default in the System set up procedure. You can always change the shipping method on any individual quote.

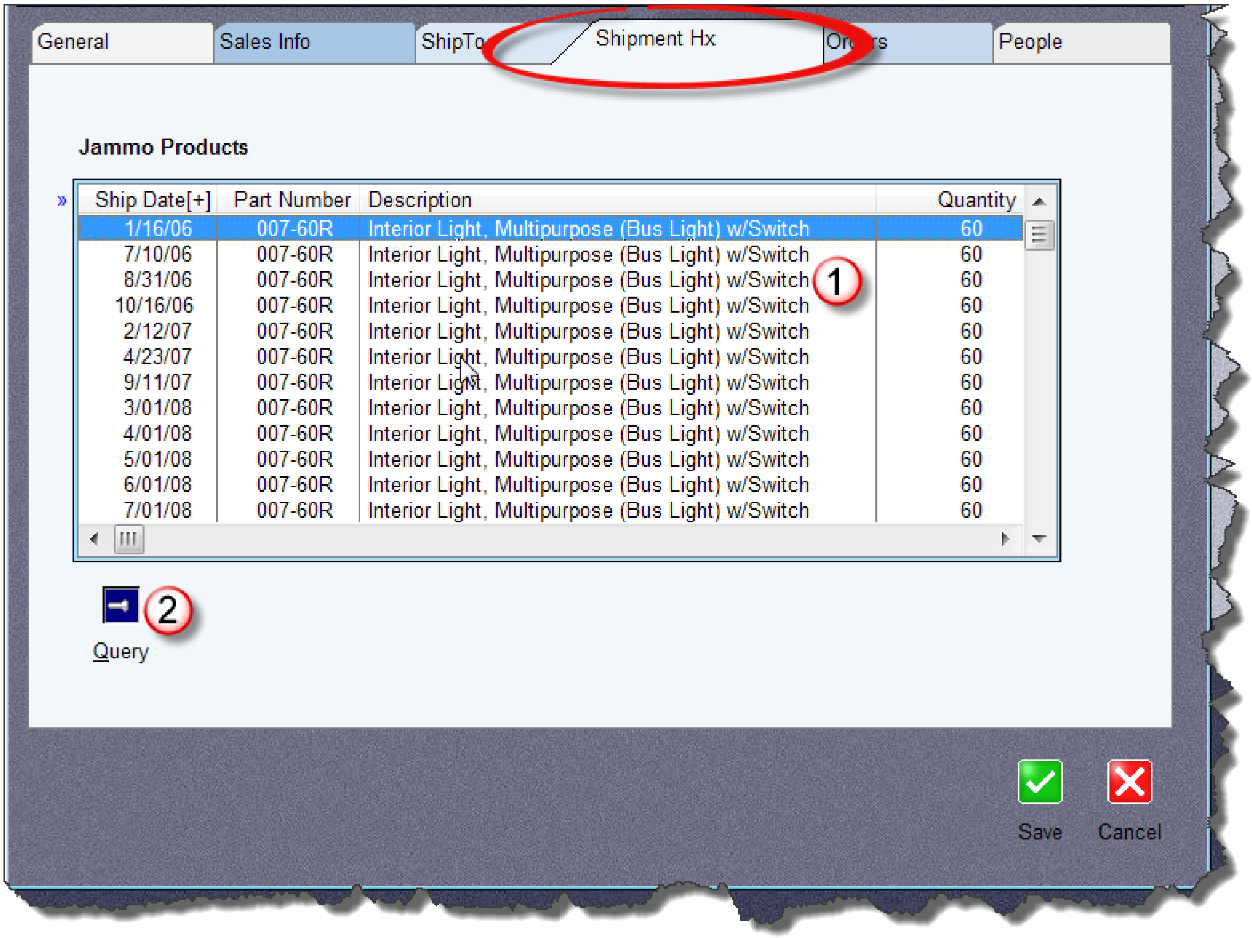
2 **Default**
This button restores the customer's ship via instructions with the system default value.

3 **Our Delivery Flag**
Check this box to indicate the item is delivered. Checking this box allows you to specify a day of the week deliveries are made to this customer. See #4 below.

4 **Delivery Day**
A drop down list allowing you to select a day of the week. This option is only visible when the Our Delivery Flag box has been checked.

5 **Default FOB**
This is the default value that will appear on quotes to *this* customer. If no entry is made here, the value you set in the System set up procedure is used.

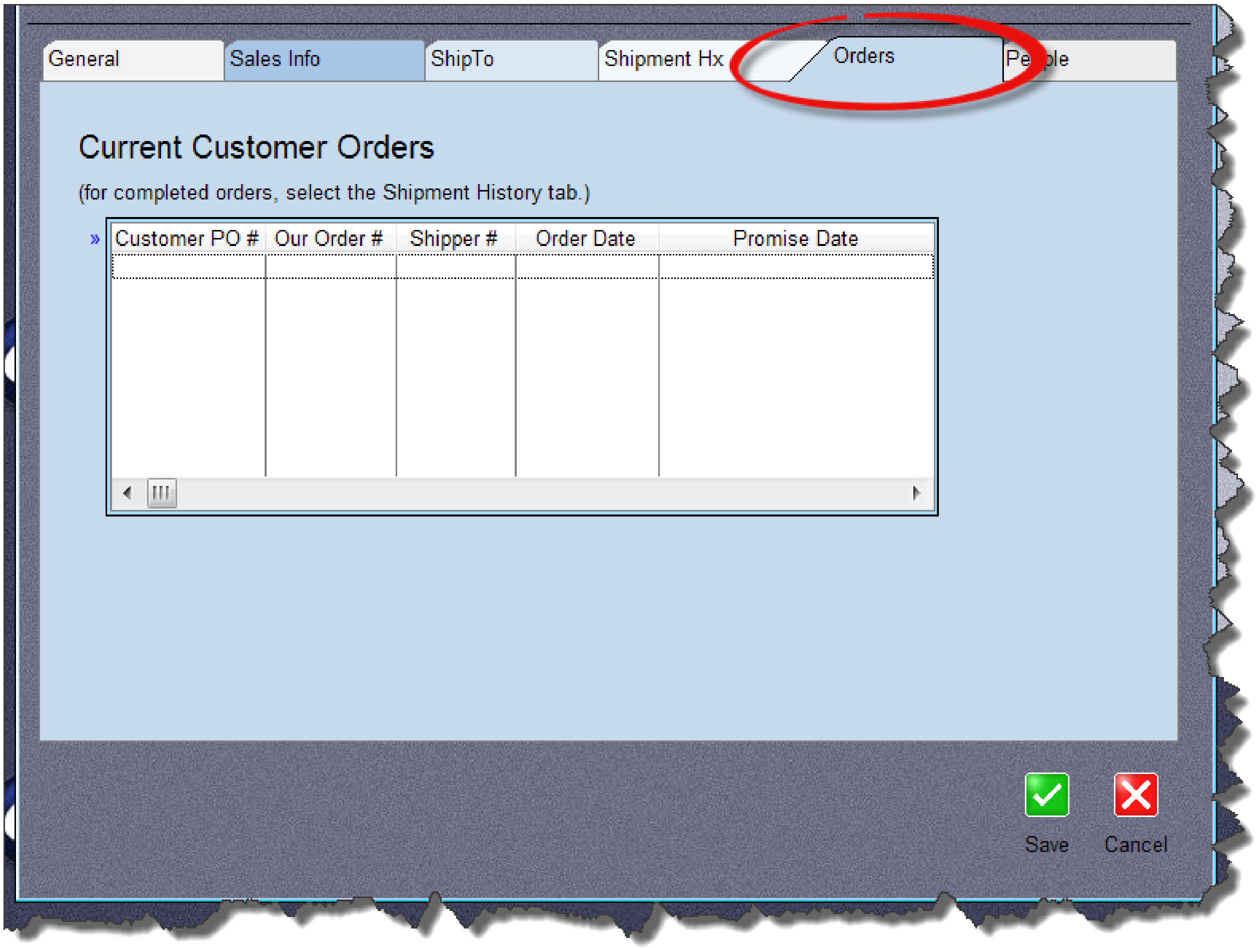
Shipment History Tab



Shipment History List
This table lists all purchases by the customer. Of course, you must import the shipments periodically for this list to be complete and up to date. For more information on importing shipment history, click here.

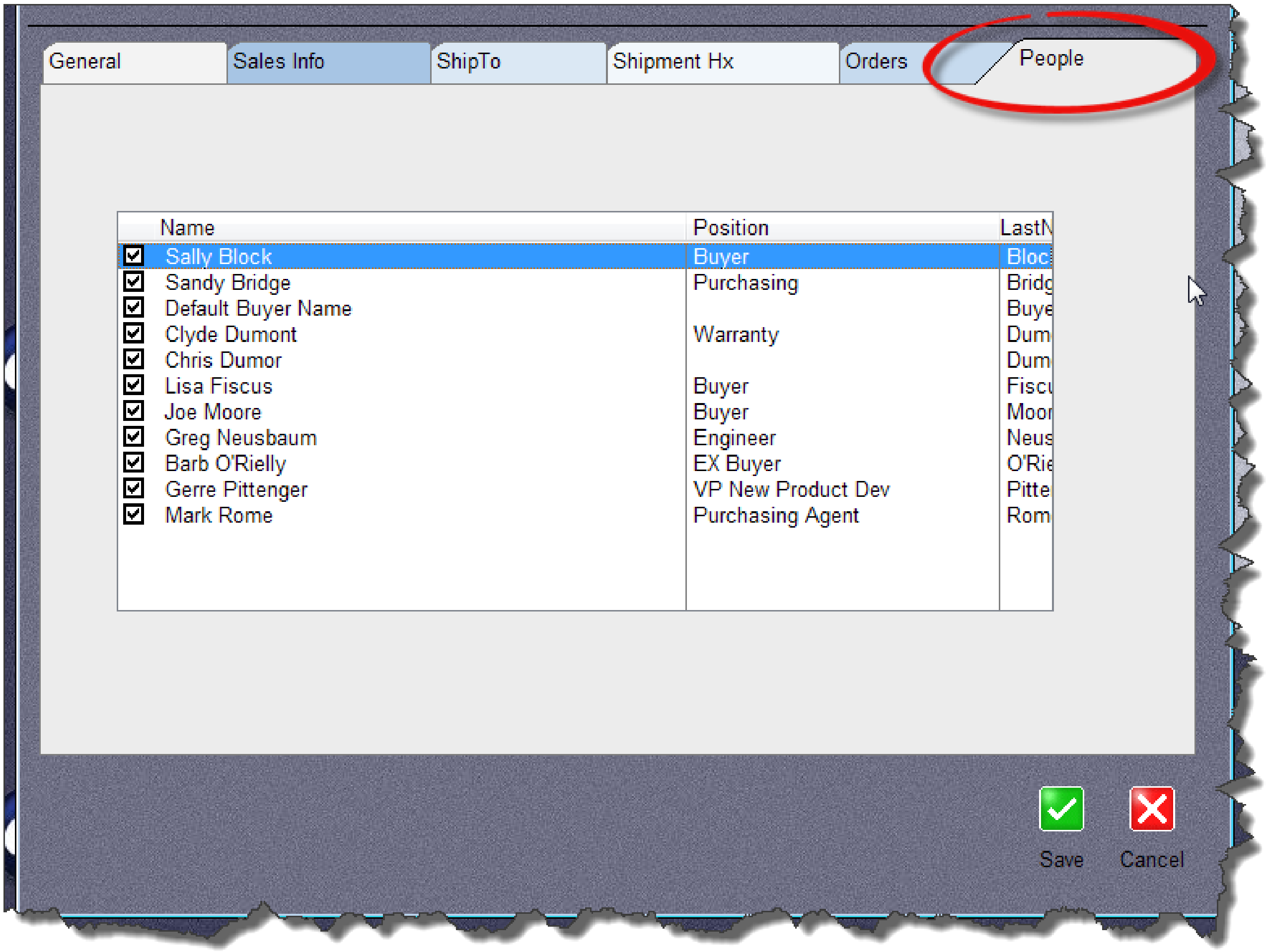
Query
This button opens a window with search options to limit the items being displayed. For more information on filters, click here.

Orders Tab



The orders tab shows current open orders for this customer. Orders can be opened here for additional detail.

People Tab



This tab lists all the contacts you have at this customer. People are added to this list when you create a quote addressed to them. (Other Agenda Development programs also add to this list. For example, if you issue an RGA to the customer, *that* person will be added to the list of names also.)

Note: MasterQ can be used by companies offering products or services to their customers. We often refer to these offerings as "Parts" or "Items" but they could just as easily be "Services".

MasterQ includes Agenda Development's powerful Parts database. This tool will hold a vast amount of information about the items you sell and allows all of your authorized users to access this information quickly. If you add other Agenda Development programs, additional features will be included in the part database.

The parts database can be used to track:

- Standard Pack quantities
- Drawings & Product Information Sheets
- Certifications on file
- Current, available and allocated inventory
- Purchased part lead time (requires additional modules)
- Kan-Ban status (requires Targets program)
- Forecast and Historical sales records
- Bill of Material & Where-Used listing (requires additional modules)
- Current open customer orders (requires additional modules)
- Quotes issued for a selected part
- Related parts that should be suggested to the customer as up-sell items
- Unlimited notes about the part.
- Information about your competitors
- Much more

New Part records may be created in one of three ways:

Adding one record at a time, as needed

The simplest way to add new parts is to manually add them to your database when you need to issue a quote. You enter the information one time manually and the information is available for you to use over and over in future quotes. This is an easy way to get started especially if you do not have a large number of parts.

On the other hand, if you have a significant number of items it may take a long time before you have all your information available. In this case, you may choose to import the part information from another system as explained below.

See how to manually create a new part number record here:
Adding One Part Record Manually

Importing part information from another system

If you have another system and the ability to export information *from* the other system into an ASCII or CSV file, importing the information is the quickest way to get your database set up.

See how to import part information here.

Creating new part records while importing sales history

The benefits of MasterQ are enhanced if you have another system and the ability to export sales history information *from* the other system into an ASCII or CSV file. When new items are found when importing your shipment history, a new part record is automatically created.

How to import part information:
Creating Part Records by Importing .

Importing part information from another program

You may choose to add parts one at a time as needed, or you can import a CSV file that has been exported from some other program that you already have in place. While you will still want to "tweak" the information, importing this way can save you a lot of time.

To do this, you will need some other existing program that contains your part numbers and descriptions and the ability to export information *from* that application in an ASCII or CSV file format.

For more information see Creating Part Records by Importing

CSV Files

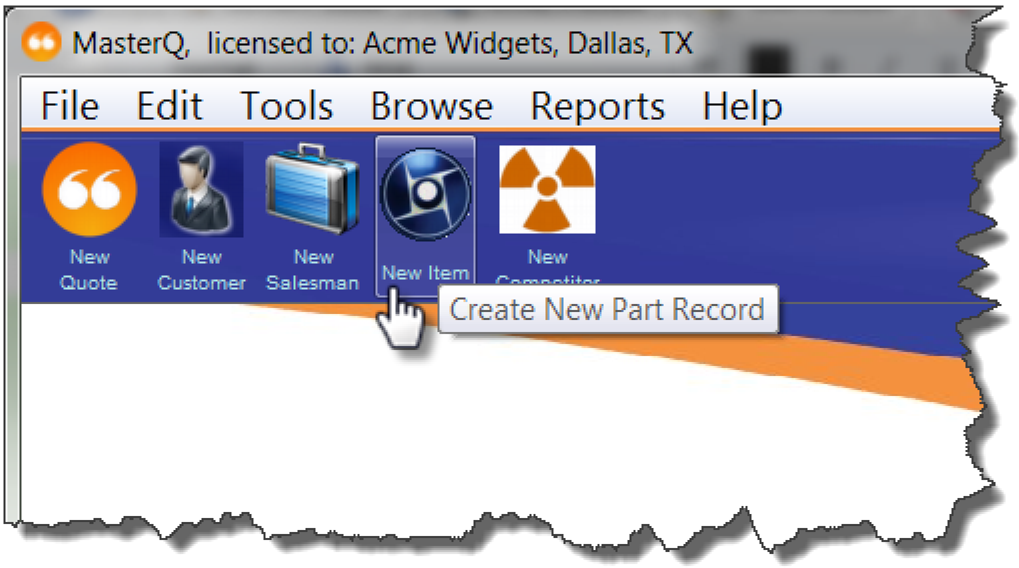
CSV files are *comma separated value* files, sometimes called ASCII files. The method of exporting the data varies from program to program and you should refer to the documentation for your exporting program for specific instructions.

Adding One Part Record Manually

You must have the Edit Parts Records attribute checked in your user record to add new part numbers. If this attribute is not checked, this button will be disabled. To see how to enable this feature for a user, click here.

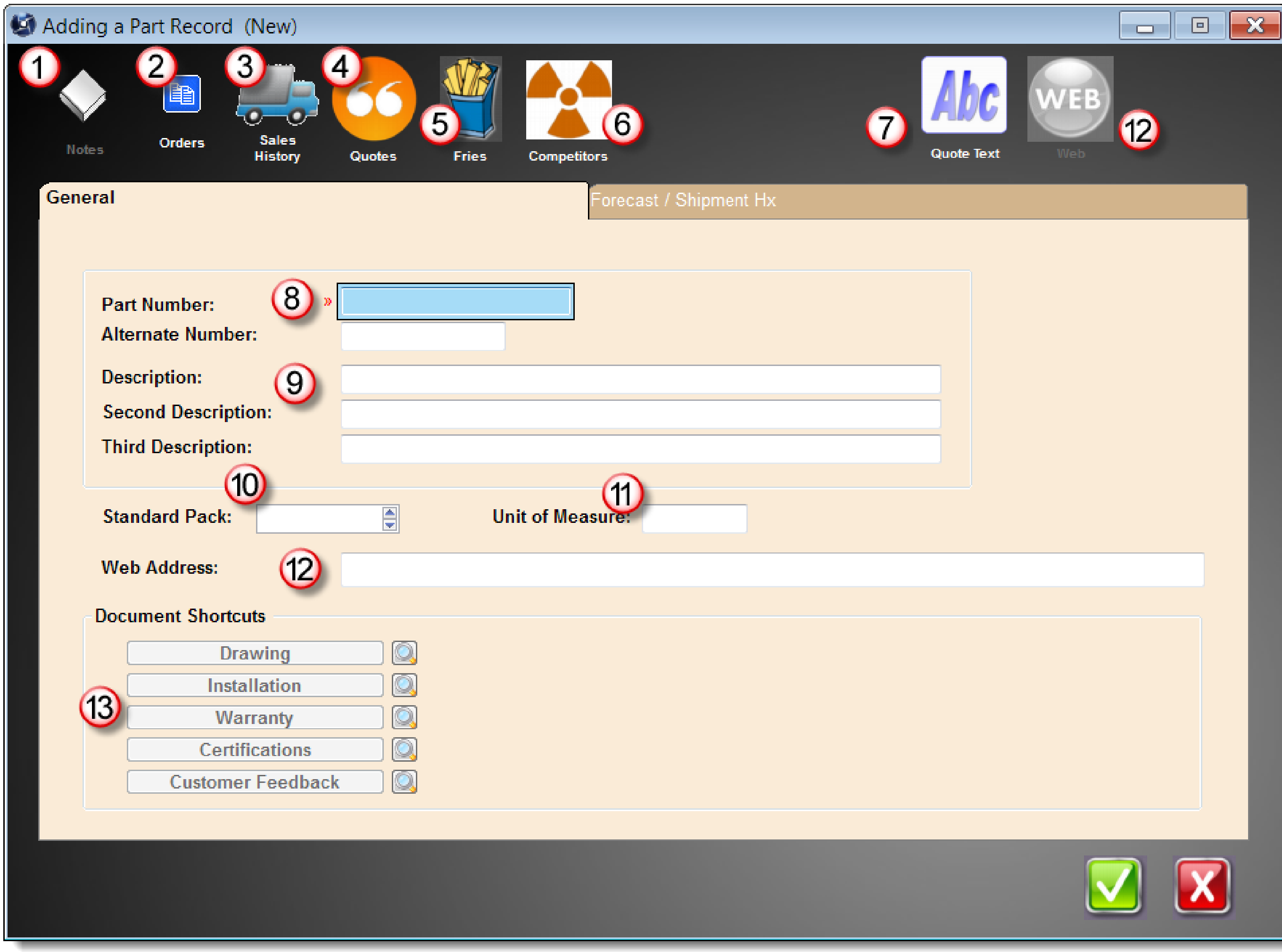
Adding items one at a time is an easy way to get started now. You'll only need to enter the information for each item one time. At a minimum, all you need to enter is the part number and a description. However, the information you enter can be shared by everyone in your organization and will become a valuable tool.

To add a item manually, press the New Part shortcut button.



Next: Adding a Part Record

Adding a Part Record (New) window



Other fields and tabs may appear on the part form if you have additional Agenda Development programs or modules installed.

NOTE: When creating a *new* item, some of the following buttons may be temporarily disabled until after the part record is saved.

Notes Button

An unlimited number of notes can be attached to each part. This button will display a list of all notes. More information about the various notes features is available here.

TIP: An Open Book icon indicates that there *are* notes for this part. If no notes have been created, the icon is a Closed Book.

2

Orders Button

If you import customer orders, this button will display a list of current open orders for this part.

3

Sales History Button

If you import sales history, this button will display a list of previous sales for this part.

4

Quotes Button

This button will display a list of quotes you have issued for this part to all customers.

5

Sales "Fries" Button

This button will display a list of related items your customer may wish to consider when purchasing the current part.

This feature is available in the MasterQ-Pro version.

TIP: Just like the "fries" offered to you at the drive up window at your favorite fast foot provider, *asking* often results in increased sales. You can set these fries to be displayed automatically. This option is set in the System record. this part.

6

Competitors Button

This button will display a list of items your competition offers. You can include information regarding pricing, features, anything that might be helpful.

This feature is available in the MasterQ-ENT & PRO versions.

7

Quote Text Button

MasterQ enables you to fully describe your offering in all the detail you need to make a persuasive, compelling proposal. Pressing this button will open a text editor allowing you to create an almost unlimited description of your product or service. The actual limit is 4,000 characters.

This feature is available in the MasterQ-Pro version.

8

Part Number

A unique part number assigned to this part.

TIP: Use a consistent part number format. Never use your vendor's part number as your own. Avoid using the letter "O". Do not use punctuation. Never include spaces.

9

Short Description Lines

There are three lines of text that are used for short descriptions of your items. These descriptions are used by various Agenda Development software.

The first line is used when browsing tables that list part numbers. This is the description you will see when you are selecting an item from a list.

The second line and third line allow you to add additional information. **It is important to understand that these descriptions are used by other Agenda Development programs and not just MasterQ.**

When you create a new item, initially there is no text description to use in a quote. The first and second lines of text are used as the default text for quotes until you make changes. (See 7 above.) The third line is not copied into the initial quote text.

10

Standard Pack

This is the default quantity that will be inserted into your quotes. Typically this might be your carton size. If you do not sell multiple items, leave this item blank or zero.

11

Unit of Measure

This is an informational field and does not print on your quotes. It may be useful in helping you understand *what* you are quoting. Typical entries might be Each, Foot, Gallon, Pound, etc.

12

Web Address

If you have a website with information about the item, enter the site here. An example might be www.agendadevelopment.com/MQ/index

When a website has been identified, the Web button in the upper right corner of the window is enabled. That button will open your web browser and take you to the page you have identified with one mouse click.

13

Document Shortcuts

These buttons are links to files related to this part. There is a lookup button to the right of each button. Use that button to point to the desired file. Once a file has been attached, the button is enabled. This allows instant access to the desired file when viewing the part record.

The labels on these buttons as well as the default folder the related files are located in are set in the System record. These descriptive labels can be set to whatever you require. More details are available here.

TIPS:

The only information required when setting up a new item is a unique item number, and a description. The description does not *need to be* unique, but it is certainly helpful if it is.

The standard pack quantity is the default quantity that will appear on your quotes, although you may change this for each individual quote as you like.

Items must exist in the parts database to be considered in the quotes you prepare. If your business model requires you to quote items that are *proposed* parts rather than "real" products, you may wish to use a special part numbering scheme. Perhaps using the customer number as a prefix.

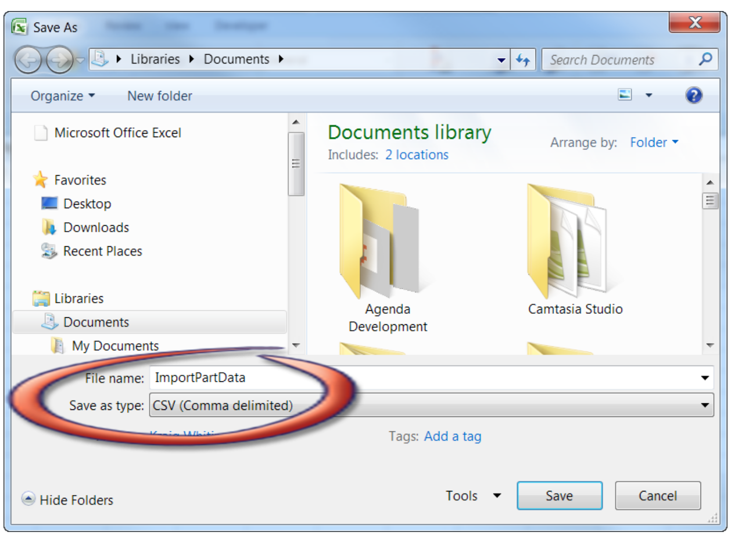
If you have a significant number of parts and they already exist in another program... *and* if you are able to export information *from* that program, it may be easier to import the data into MasterQ rather than creating each record manually.

The file format required is called CSV which stands for comma separated values. Sometimes this format is called ASCII. It is a very common format that many programs are able to handle. (Microsoft Excel is able to easily export information in this format also. If your current software can export to Excel, you can copy it from Excel to a CSV file.)

The file should contain the unique part number followed by a comma, and then the description. As the file is processed, MasterQ will check to see if that file exists in your parts database. If it already exists, the entry will be ignored. If it does not exist, a new record will be created.

Always back up your files before importing files. Mistakes happen. Better safe than sorry.
You can back up your files using the Windows explorer program or use MasterQ's built in back up procedure. More information is available here.

TIP:
Not sure if your other program can export in this format? Can it export this information into an Excel spreadsheet? If so, Excel can export the data in the proper CSV format. NOTE: Depending upon the version of Excel you are using, the Excel window shown below may appear differently on your system. All versions of Excel are able to export using the CSV format.



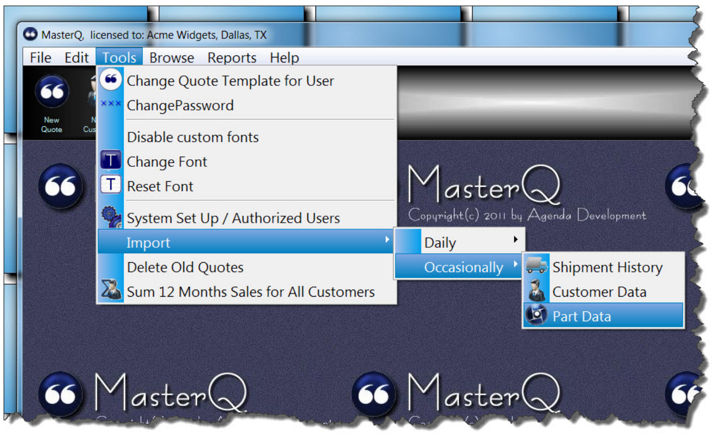
The specific steps for creating the CSV export file will depend upon the software you are exporting *from*. Consult the documentation for that program. The export file for the part data file should contain 2 fields: the part number and the description.

A typical export file might look like this:

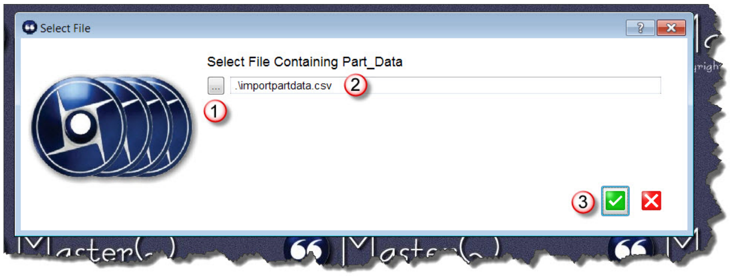
```
001-111,"Widget, Blue"
001-112,"Widget, Green"
001-113,"Widget, Purple"
```

Next: Importing Part Data

After you have created your CSV file with the part information to import, Select TOOLS-IMPORT-OCCASIONALLY-PART DATA from the main menu.



Next, you will need to tell MasterQ which file contains your data.


Select File
Select File Containing Part_Data
.\importpartdata.csv
1
2
3

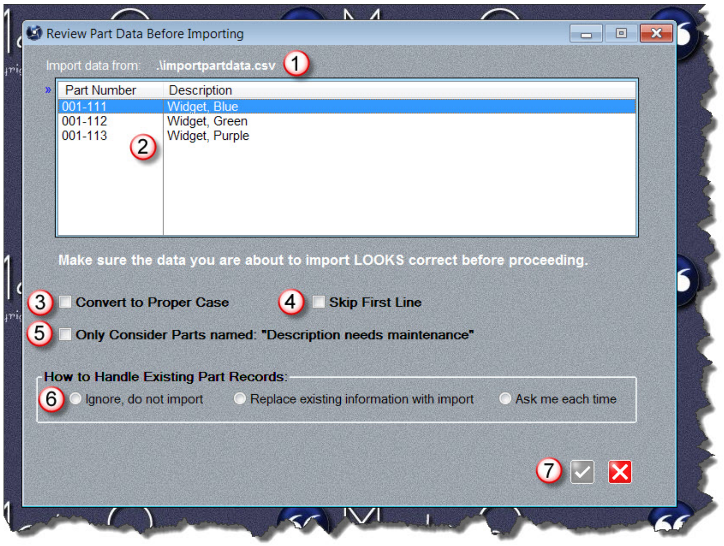
1. Use the look up button to browse files and click on the file you wish to import from.
   Or...

2. Type in the path and filename of your import file. Then...

3. Press the OK button to continue.

MasterQ will remember the file you choose. If you import this information again in the future, the file you used will be filled in automatically. If you want to use the same file, all you will need to do is press the OK button.

There are several options to consider before you import the part information.


Review Part Data Before Importing
Import data from:
.\importpartdata.csv
1
Part Number
Description
001-111
Widget, Blue
001-112
Widget, Green
001-113
Widget, Purple
2
Make sure the data you are about to import LOOKS correct before proceeding.
3
Convert to Proper Case
4
Skip First Line
5
Only Consider Parts named: "Description needs maintenance"
How to Handle Existing Part Records:
6
Ignore, do not import
Replace existing information with import
Ask me each time
7

1 The file you have selected to import from is displayed here. This is helpful if the file does not seem to contain what you expected.

2 Import data list shows the contents of the file. You should examine the displayed information to confirm that the part numbers look correct and that they appear in the first

column. The description should appear in the second column if you have exported the file correctly.

3 Check Convert To Proper Case if your imported information is in all capitals and you wish to automatically change it to a mix of upper and lower case characters. For example, WHEEL would become Wheel.

4 Some programs automatically include a first line in the export file they create that lists the column heading. This might appear as "Part Number" or something similar. Check Skip First Line and MasterQ will ignore the first line.

5 Certain Agenda Development programs may automatically create part records for you under certain conditions. For example, BucketManager will automatically create

a part number if you import a customer order for that part number. Part records may

also be created automatically if you import inventories from another system, but the part

with inventory does not exist in MasterQ. In these cases, the description will be set as

"Description needs maintenance". Check this option to *only* update part records with a current description of "Description needs maintenance".

6 When the import process finds a part that already exists in your parts database a choice must be made. Check "Ignore, do not import" to skip existing parts. This is

helpful if you have modified the description from it's original content. For example, many accounting systems may use names that are fine for internal use, but not marketing

optimized. You don't want to lose improvements you have made. Check "Replace existing

information with import" if you wish to use the descriptions from your import file even if

you have made changes to them in MasterQ. Checking "Ask me each time" will show you

changes and ask you to select which you wish to use. Parts with descriptions that match the import file will be ignored to save you time.

7 Once you have made the required decisions, the OK button will be enabled and you may proceed.

After the import process, a confirmation window will show the number of new parts added, modified, skipped and any errors encountered.

The Salesman Database

Who can create a Salesman record?

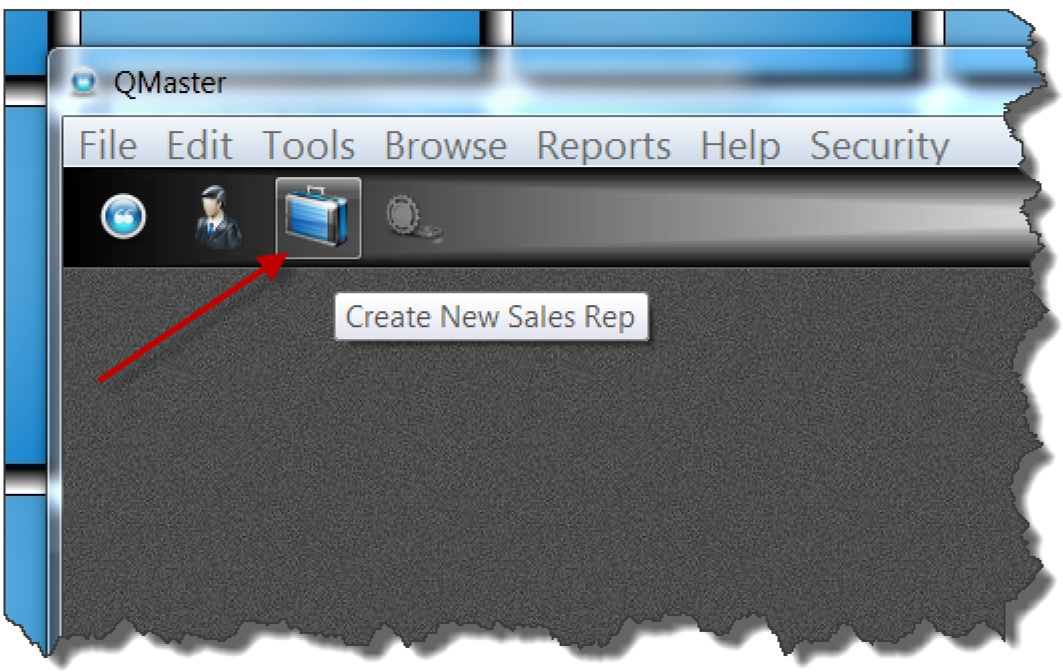
To create a new salesman record your user account must have the Edit Sales Rep box checked, or your user record must show that you are a super user of MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)

Who IS a Salesman anyway?

You can set up both in-house salesmen and outside reps as "salesmen". Customers can then be tagged as "belonging to" these salesmen. Additionally, identifying in-house salesmen will allow you to easily report on the number of quotes issued to customers belonging to these salesmen as well as your outside reps.

Creating a Salesman record

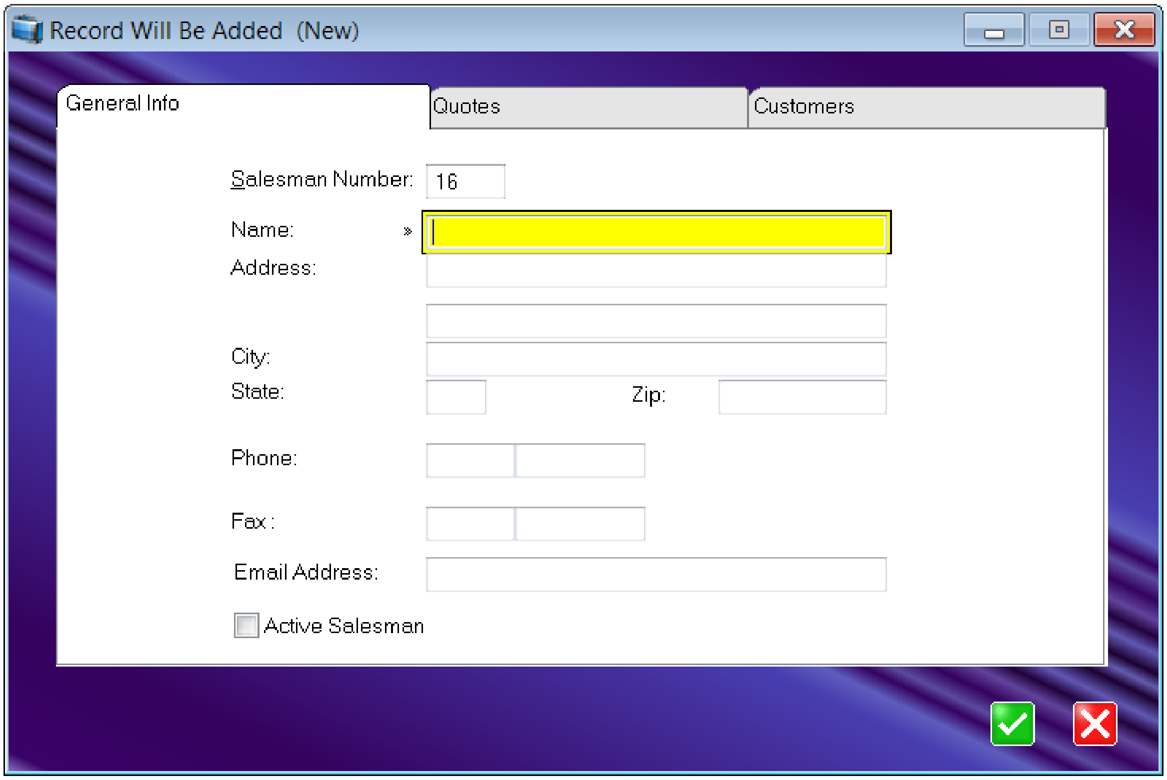
The easiest way to add a new salesman record is to press the shortcut button at the top of the MasterQ window.



If you prefer, you could use the Browse|Sale Reps command from the main menu and press the Insert key. In either case, you will then see the blank Sales Rep record. The salesman number is automatically assigned for you.

TIP: Set up salesman number 1 as your House account. This is the "sales rep" that will be assigned if no other entry is made.

Watch a [video showing how to add a sales rep] here.



Each salesman requires a unique name. Other fields are optional. Some fields may be used by other Agenda Development programs.

The quotes tab lists all quotes related to this salesman.

The customers tab lists all assigned customers

The Payment Terms Database

Payment terms may be accessed through the System record as well as by using the BROWSE|SALESMAN menu choices.

Payment terms you have defined may be marked as Active or not. Only Active payment terms are available when creating a quote.

Next: Browsing Payment Terms

TIP: Why would you choose *not* to make a Payment Term active? Suppose you offered a special limited time offer of special NET 60 financing. You could enter the information once, and after the time period, make it inactive. At some time in the future you could repeat the special easily.

The User Database

A "User" is a person that you have given permission to access Agenda Development programs. Each user can be authorized to use various programs, while at the same time being excluded from others.

Keep in mind that all Agenda Development programs use the same list of Users. This means, that you might see "Bob" included in the list of Users in the MasterQ program. However, Bob may not be allowed to use MasterQ. He may be showing in the list because he *is* allowed to use the NaftaBlaster program.

Resist the temptation to delete users from the list. Even if they are no longer with your company.

Each User has their own unique sign on name and password. Each user can be authorized to perform certain tasks in the program and can be excluded from performing others.

MasterQ recognizes the user and tags their quotes, notes and other items to indicate who created the document, or made a specific change.

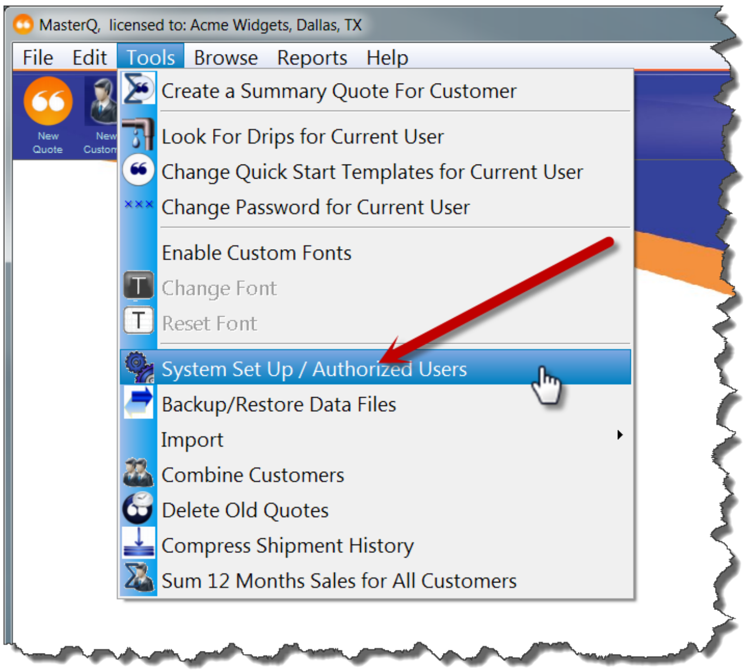
There is a difference between the general term "users" and the idea of licensed concurrent users. You may have any number of users with accounts set up. Your specific license for MasterQ permits a certain number of users to be running the program at one time. If you have 2 licenses available, the third user will receive an error message when they attempt to start the program.

Users can be given permission to access the MasterQ program from the Authorized Users tab in the system set up window. Select **TOOLS | SYSTEM SET UP / AUTHORIZED USERS** from the main toolbar.

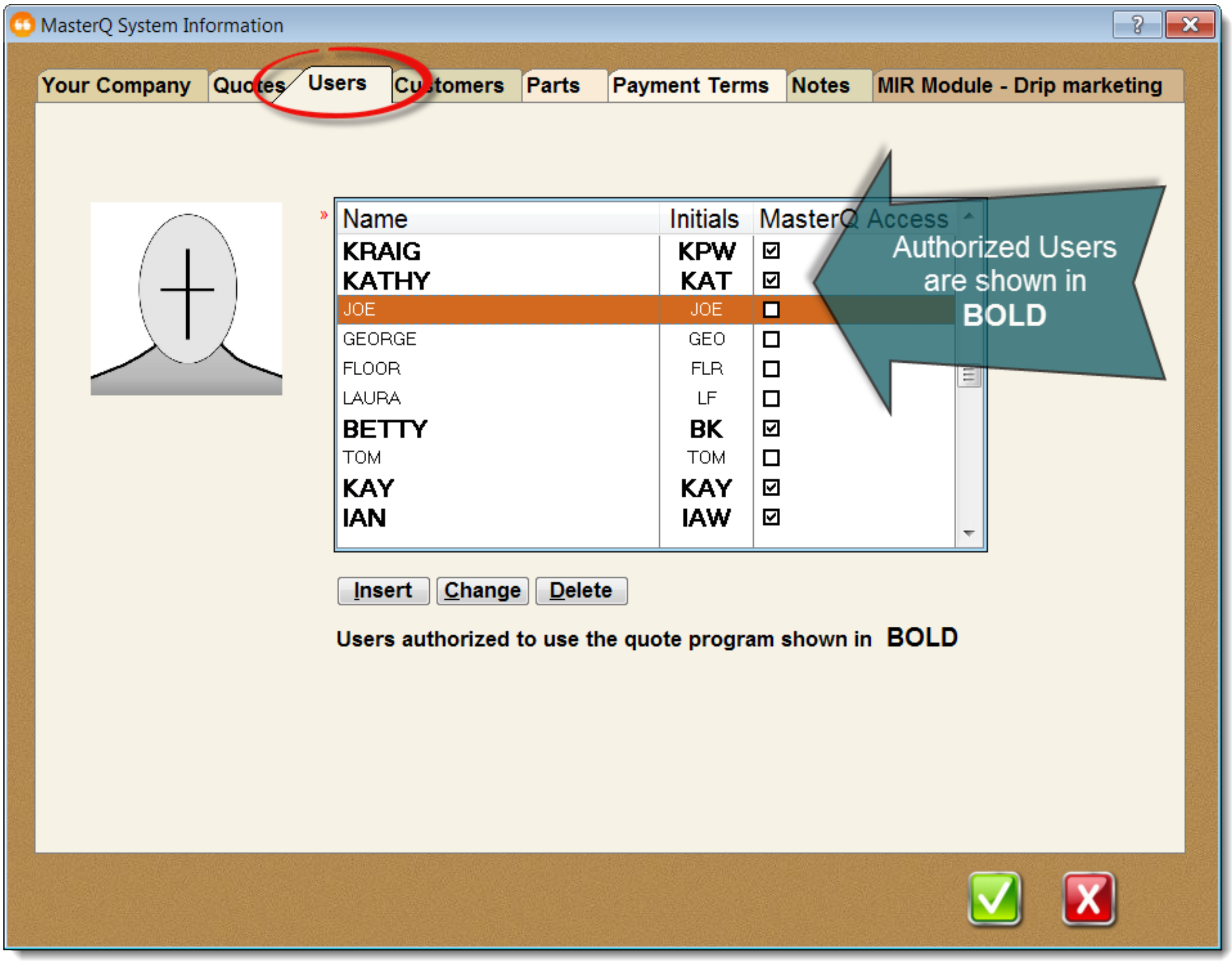
NOTE: New users can only be set up by Users with the MasterQ Manager or Super User option enabled.

Viewing Authorized Users

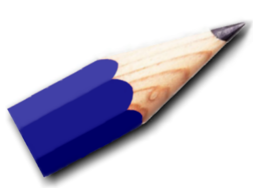
Authorized User accounts can be accessed using the TOOLS | SYSTEM SET UP / AUTHORIZED USERS command from the main toolbar. Your user account must be set up with the Manager or SuperUser options enabled for you to access these commands.



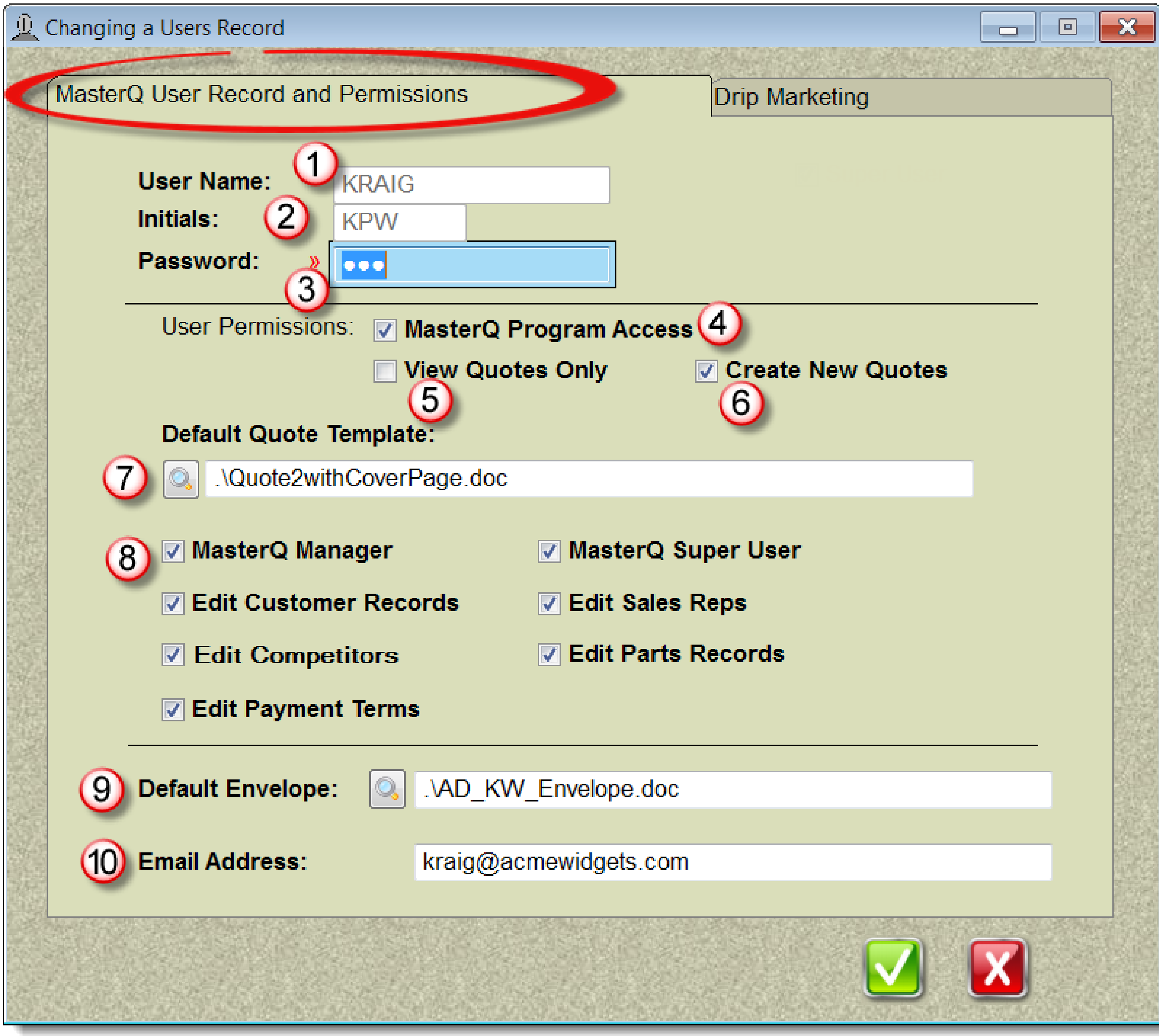
After opening the System Set Up form, select Authorized Users.



Authorized users are entered on this tab. It is important to recognize that users listed here have been given access to various Agenda Development programs you have licensed. They *may* not have been given authorization to access the MasterQ program but will still be listed here. Users with authorization to access MasterQ are shown in bold.



TIP: While you can delete users from this screen, we recommend against it. Users listed here have may still need access to other Agenda Development programs. Instead, if you wish to revoke access to the MasterQ program simply edit the user's privileges as shown below.



1. **User Name** - Enter a unique name for this user. Up to twenty characters.

2. **Initials** - Enter a unique set of initials to identify this user. Up to three characters.

3. **Password** - This password is used to log into all Agenda Development programs. Up to 15 characters. The user has the ability to change their password themselves, but you must set up an initial password so they may access the program. Passwords are case insensitive.

4. **MasterQ Program Access** - Allows this user to start the MasterQ program. Remember, you many have other Agenda Development programs. Not all users may have access to the MasterQ program.

5. **View Quotes Only -** Users with this box checked can start the MasterQ program and view quotes. They cannot create new quotes.

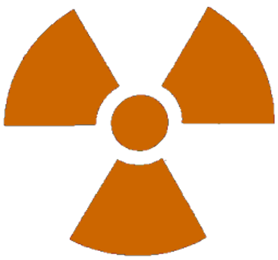
6. **Create New Quotes** - Check this box to enable users to create new quotes.

7. **Default Quote Template** - Each user *may* have a their own quote template used to generate quotes they create. If no entry is made here, the user will use the default quote template that was selected for the entire system.

8. **MasterQ Permissions -** These check boxes to enable or disable certain features in the program for this particular user.

9. **Email Address for User** -

The competitor database features are a part of MasterQ-PRO and MasterQ-ENT.



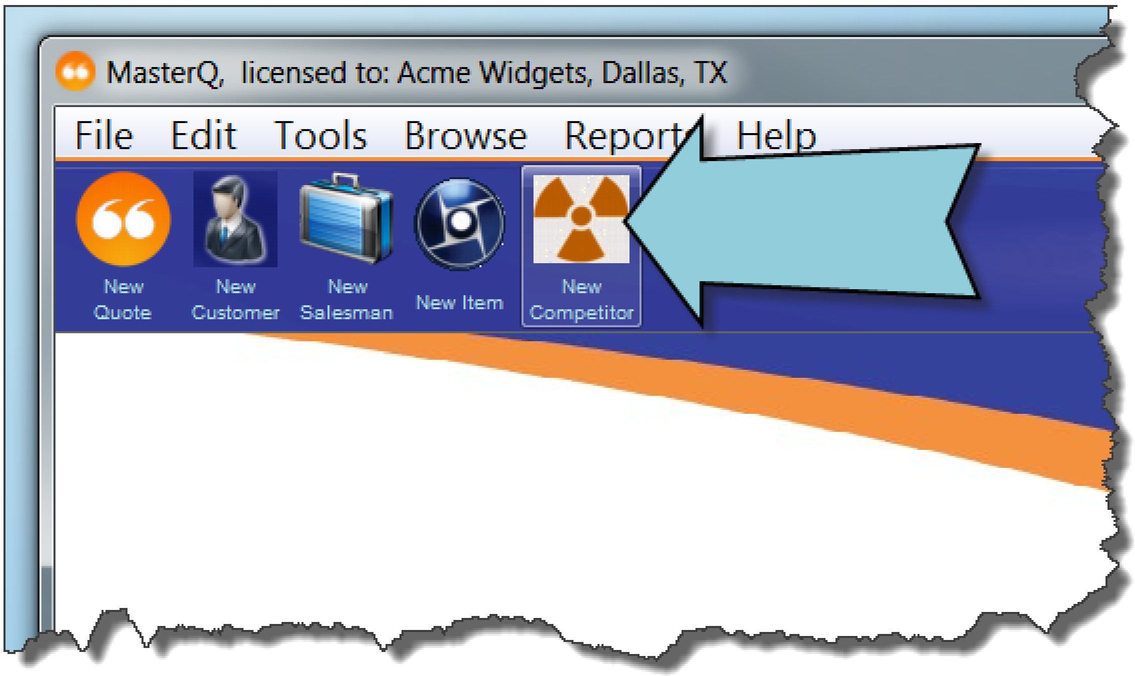
We all have evil competitors who will stop at nothing to tie us to a train track. Ok, maybe it's not that bad. But MasterQ will let you track your competitors, give you cross reference tools to their part numbers, as well as give you a place to note features comparisons, and pricing insights.

What is the Competitor Database Used For?

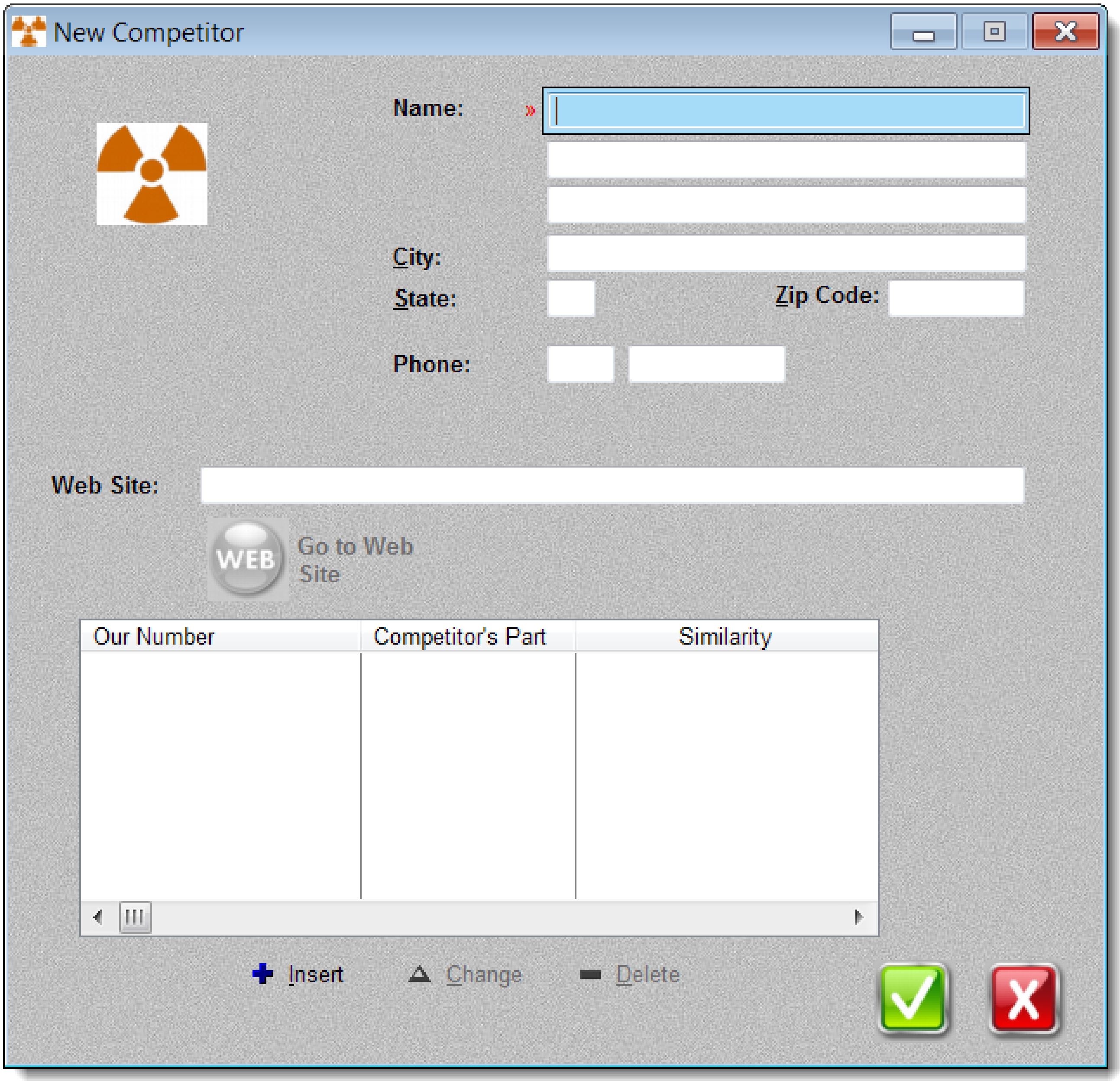
The competitors database is a tool used to retain and share information you accumulate about your competitors and their products. Keep notes about competitor pricing, quality issues, too. Visit your competitor's website with the click of a button.

Figuratively speaking of course.

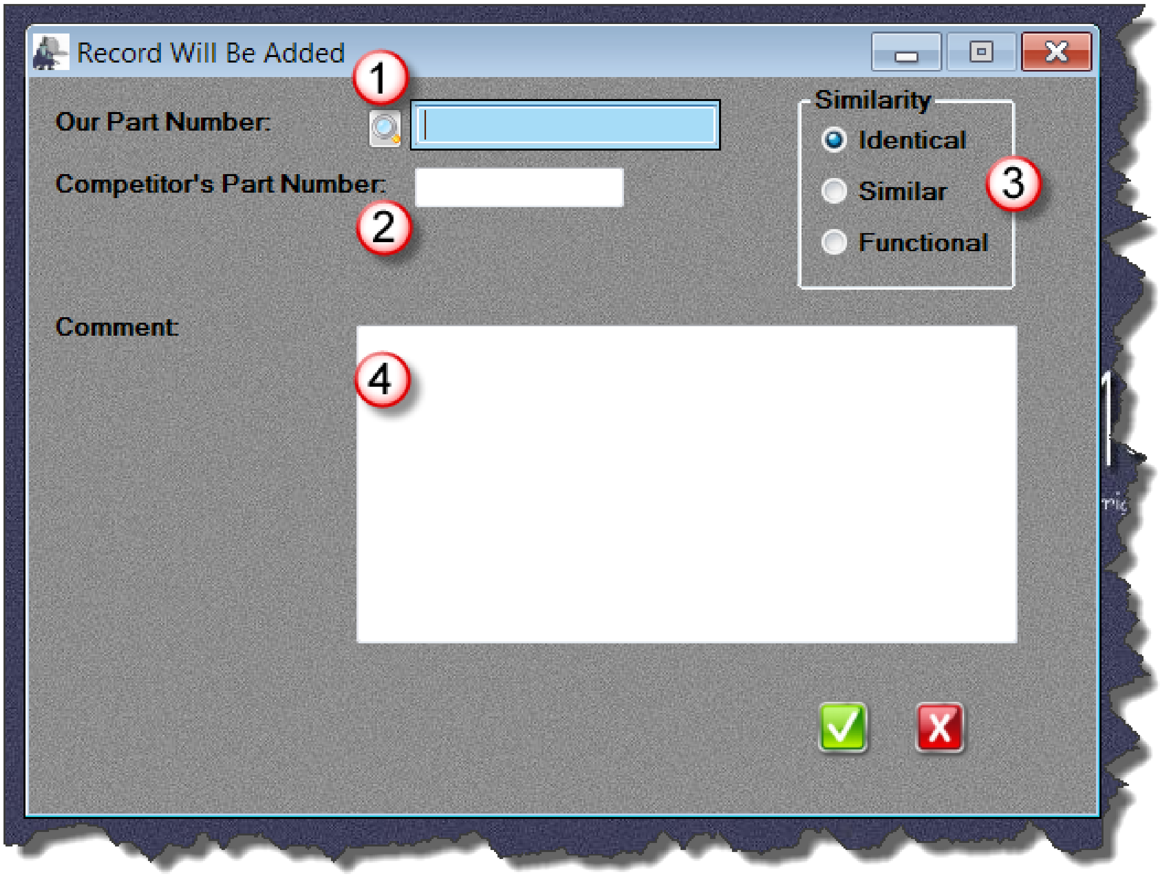
The easiest way to add a new competitor record is to press the shortcut button at the top of the MasterQ window.



If you prefer, you could use the Browse|Competitors command from the main menu and press the Insert key. In either case, you will then see the same blank Competitor record.



Enter the competitor's name and any additional information you care to. Save the record before adding competitor's parts.



1 Enter your part number or use the lookup button to select from a list.

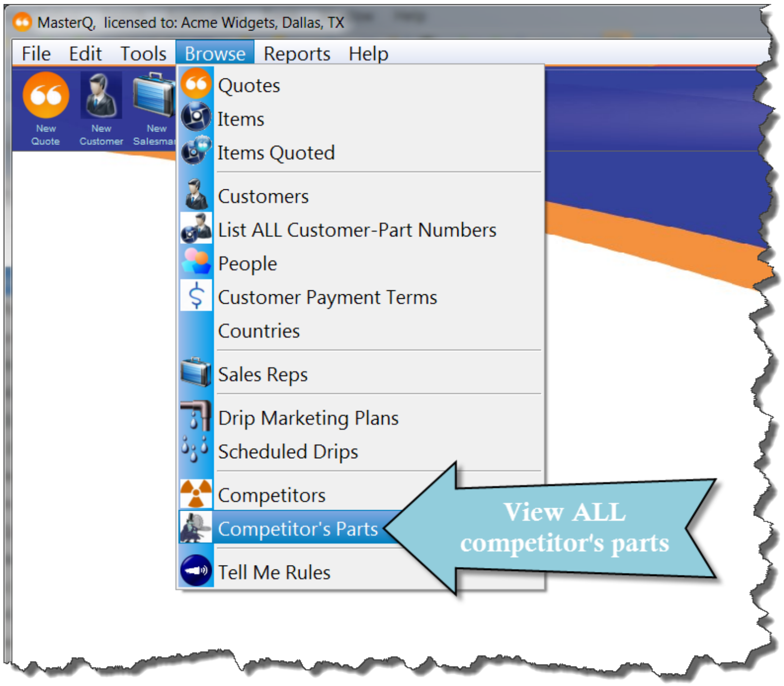
2 Enter your competitor's part number

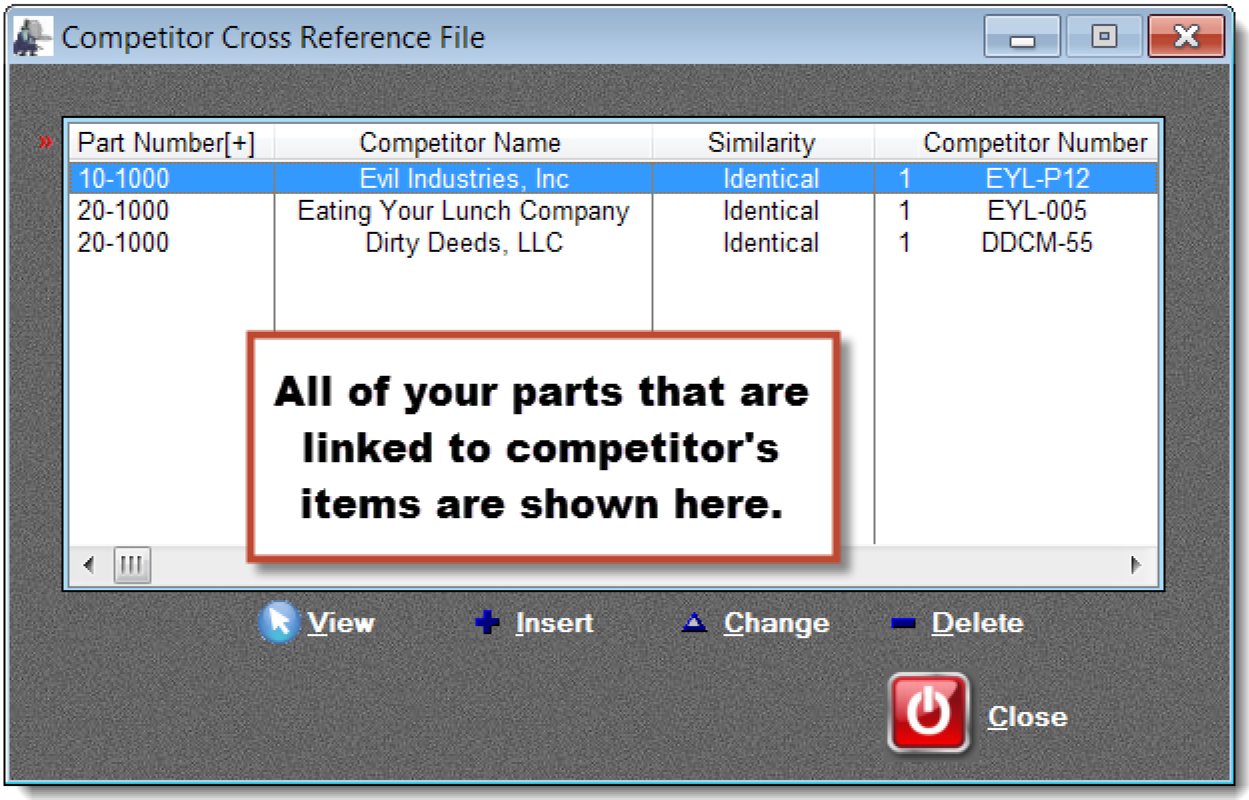
3 The similarity feature is for reference only. It is used to help you quickly remember *how* similar a competitor's product is.

4 Any comments you wish may be entered here. Consider pricing information, things to bring up with potential customers, as well as things you would prefer *not* to bring up with potential customers.

Competitor Cross Reference Listing

There may be times when you wish to view a list of *all* of the items from various competitors that you have identified and linked to your items. MasterQ handles this using the Competitor's Parts browse table.




Competitor Cross Reference File
Part Number[+]
Competitor Name
Similarity
Competitor Number
10-1000
Evil Industries, Inc
Identical
1
EYL-P12
20-1000
Eating Your Lunch Company
Identical
1
EYL-005
20-1000
Dirty Deeds, LLC
Identical
1
DDCM-55
All of your parts that are linked to competitor's items are shown here.
View
Insert
Change
Delete
Close

Program Features

MasterQ is intended to help manufacturers and distributors sell more effectively. Our primary customer uses quote proposals to sell a number of items in a business-to-business model.

MasterQ will:

- Help you create quotes quicker than you ever thought possible.
- Let you build persuasive descriptions one time and re-use them in every quote you create.
- Enable you to quote confidently. Product documentation, inventories, shipment histories, previously quoted prices, as well as other product information you need.
- Increase sales of ancillary items that you might otherwise forget to quote.
- Keep track of your competitors, their pricing, their part numbers and quickly visit their websites when the need arises.

In this section, we will review some of the features that are common throughout the MasterQ program as well as other Agenda Development software.

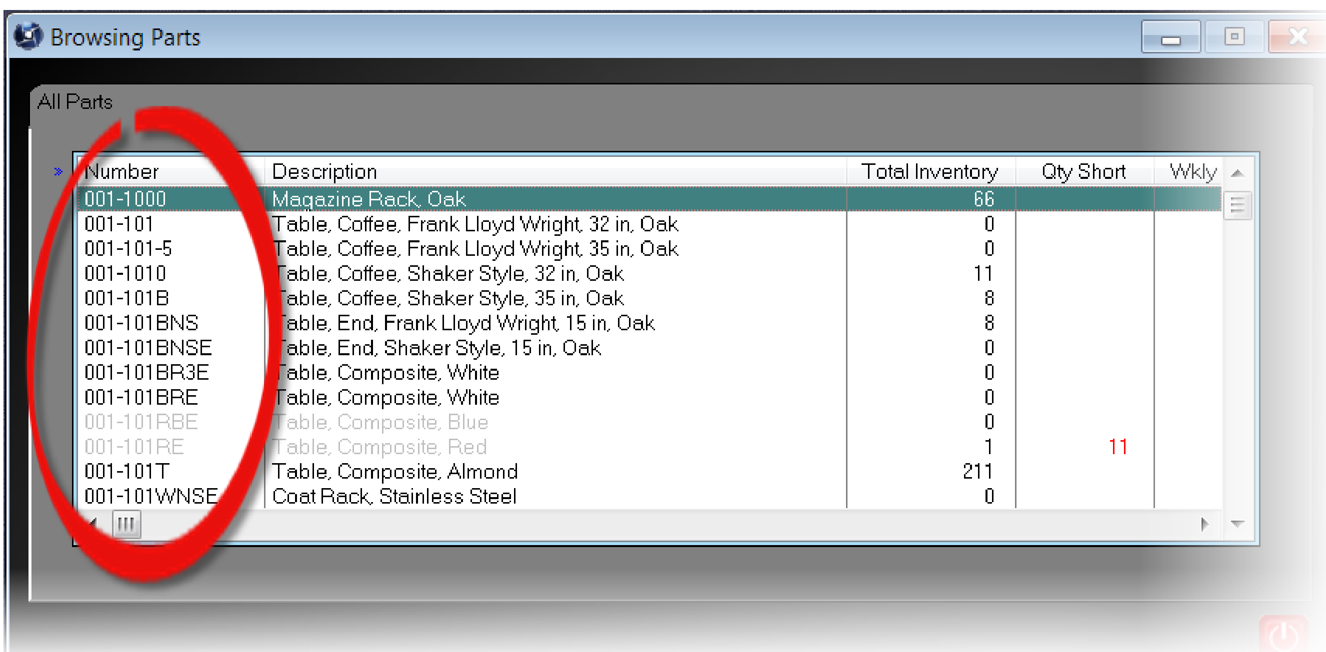
Browsing Tips

Most of the information presented in Agenda Development programs is presented in tables. You may think of these as lists. There are many common tools available to help you locate and use the information displayed. This section will present some common techniques that will be useful.

When you open a browse table, you can position the browse window at the screen location of your choosing. Left click on the window title line and drag the window to the desired location. MasterQ will remember that location *next time* you open that window. *Your* location is yours alone and does not affect where other users place *their* browse table.

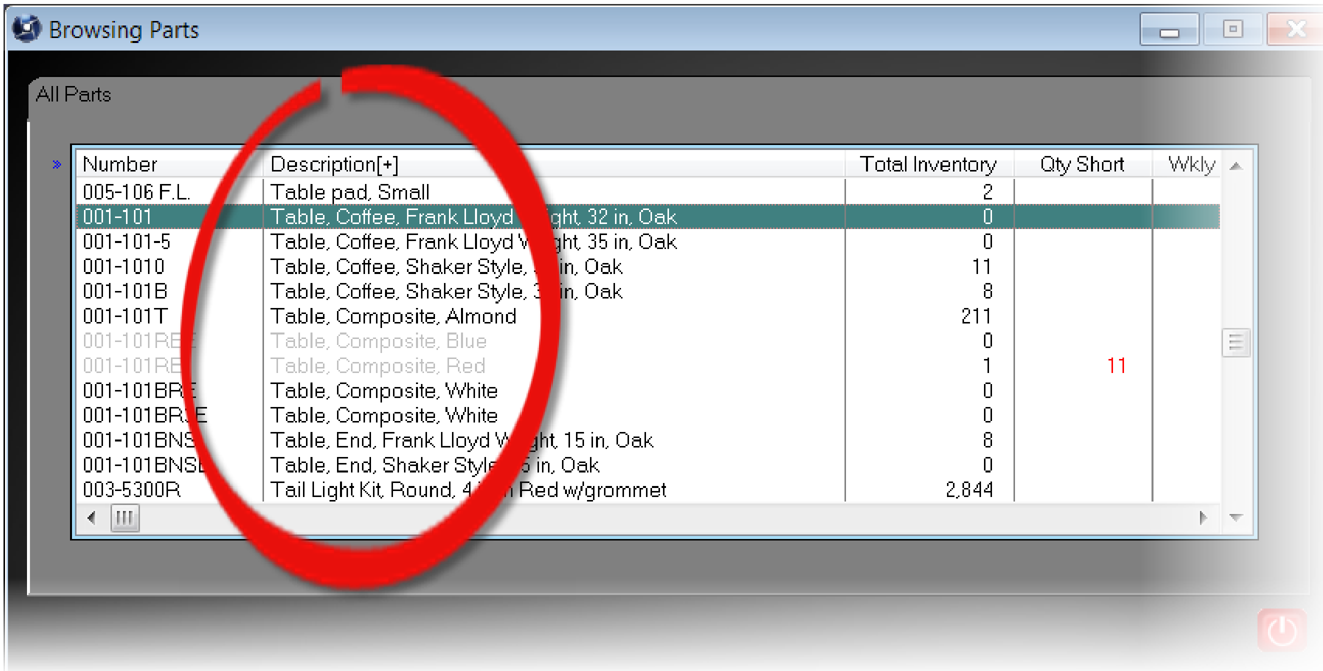
TIP: Between changing font sizes using Custom Fonts and using multiple monitors, it is possible to move a window off the edge of the screen. If you cannot *see* a window that you suspect is actually open you can use the **FILES | CASCADE WINDOWS** command to bring all open windows into view.

Items are listed in a particular order. For example, when you browse parts, the items are listed in part number order.



Number	Description	Total Inventory	Qty Short	Wkly
001-1000	Magazine Rack, Oak	66		
001-101	Table, Coffee, Frank Lloyd Wright, 32 in, Oak	0		
001-101-5	Table, Coffee, Frank Lloyd Wright, 35 in, Oak	0		
001-1010	Table, Coffee, Shaker Style, 32 in, Oak	11		
001-101B	Table, Coffee, Shaker Style, 35 in, Oak	8		
001-101BNS	Table, End, Frank Lloyd Wright, 15 in, Oak	8		
001-101BNSE	Table, End, Shaker Style, 15 in, Oak	0		
001-101BR3E	Table, Composite, White	0		
001-101BRE	Table, Composite, White	0		
001-101RBE	Table, Composite, Blue	0		
001-101RE	Table, Composite, Red	1	11	
001-101T	Table, Composite, Almond	211		
001-101WNSE	Coat Rack, Stainless Steel	0		

But you can change the displayed order by clicking on the column header. For example, clicking on "Description" one time will change the display to:

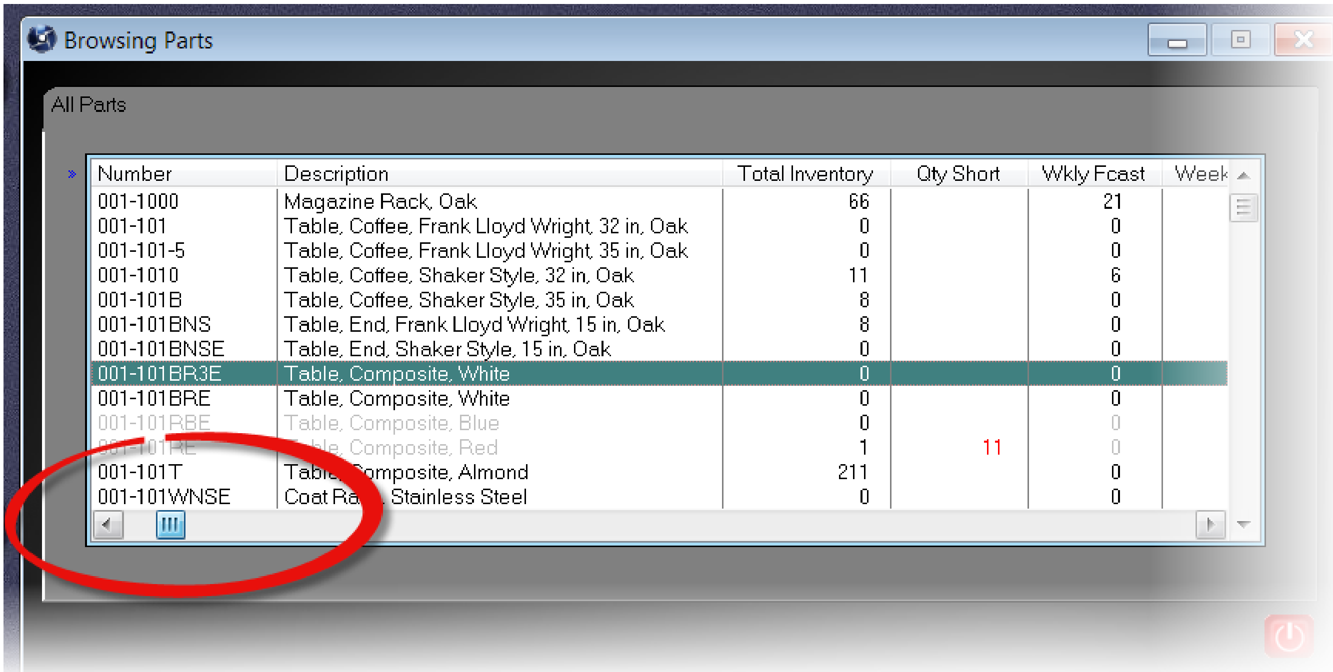


Note the small **+** sign to the right of the word Description in the table above. Clicking Description a second time will reverse the sort order.

The next time you open this browse, it will return to the standard sort order.

Horizontal Scrolling

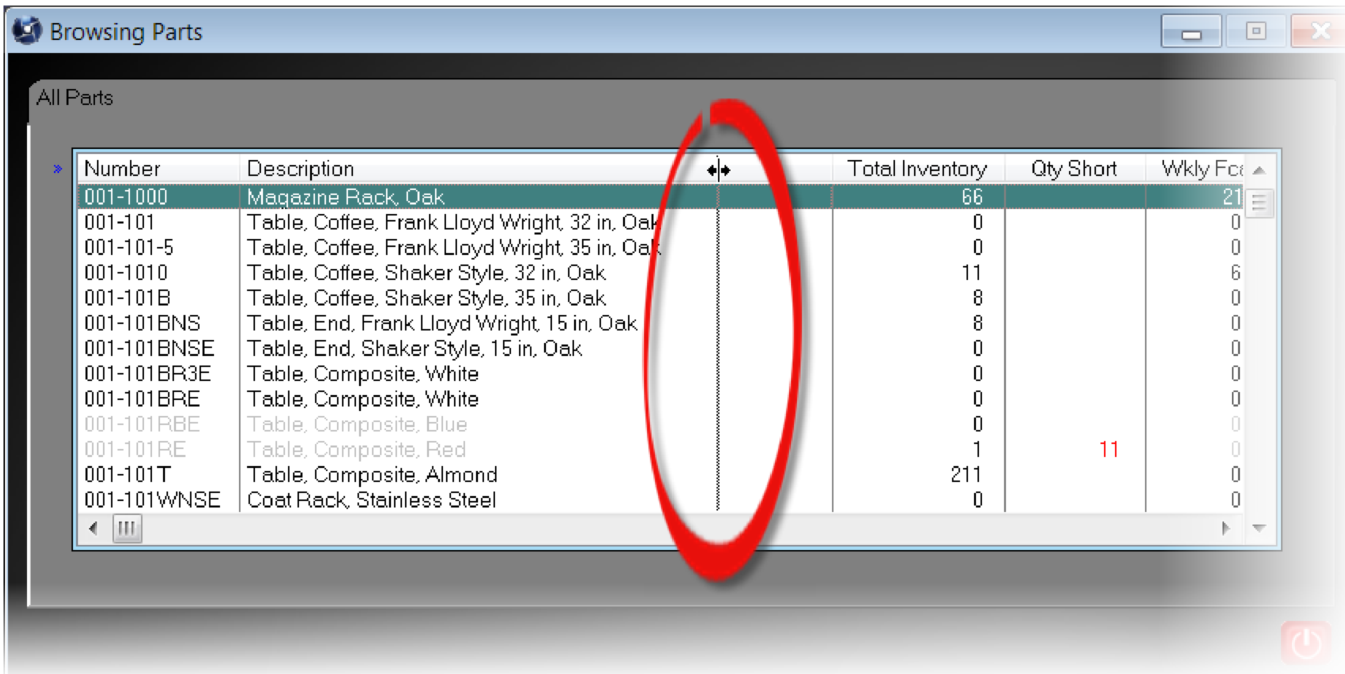
The most important information is listed in the first column. For example, in a list of parts, the first column will initially contain the part number, followed by the description. But more information *may* be available. Watch the browse tables for a horizontal slider bar located at the bottom of the list. This indicates that more information may be available by moving the slider to the right or by pressing the right arrow key.



Resizing Columns

You can change the width of columns by left clicking on the column divider line and dragging to the left or right to decrease or increase the displayed width. This is helpful if you want to see information that is normally hidden to the right of the displayed columns.

Changes you make to the column width are only applied to the browse table you are currently using. If you close the window and re-open it, or restart the program, the column widths are reset to their original dimensions.

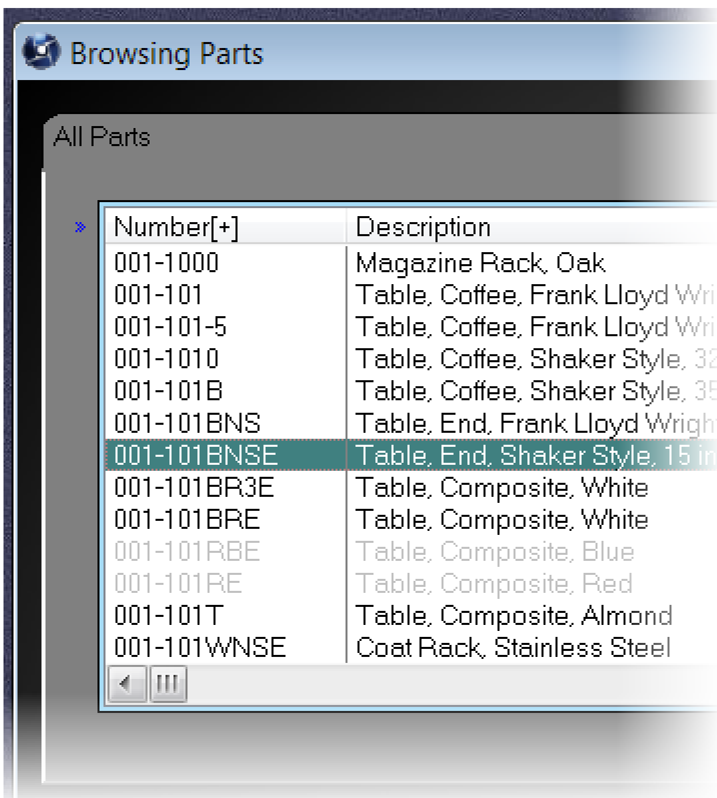


Finding an Item in the List

There are several ways to move through the list of items in a browse table. Of course you may use the up and down arrow keys as well as the PageUp and PageDown buttons on the keyboard. The Home key will take you to the first item and the End key will take you to the end of the list.

But you can also type in the item you are looking for. As you type, MasterQ will move the cursor to the first matching item in the list.

For example, if you were seeking part number 001-101BRE, as you type in 001-10 nothing would seem to be happen at first. But that is because the highlighted record *is* a match for "001-10". However, when you next press the 1 key, the highlight bar will jump down to part number 001-101. Pressing the B key will move the cursor to item number 001-101B. When the R key is pressed, the highlight bar will move to part number 001-101BR. Finally, when the E key is pressed the highlight bar will be on item number 001-101BRE. This makes finding an item very fast.



If you need to start over, press the arrow up key one time. This will clear the locator. Pressing the arrow key down does *not* clear the locator.

Changing or Viewing an Item

Viewing or changing an item is simple. Position the highlight bar on the item you wish to work with. Then press the enter key or double click using your mouse. You may also right click on the item then select Change from the displayed menu. The information will be displayed on a form.

Some browse lists restrict *who* can view the record. If your user record does not allow you to view the information you will be unable to open it. On right clicking, the Change option will be disabled.

Adding an Item

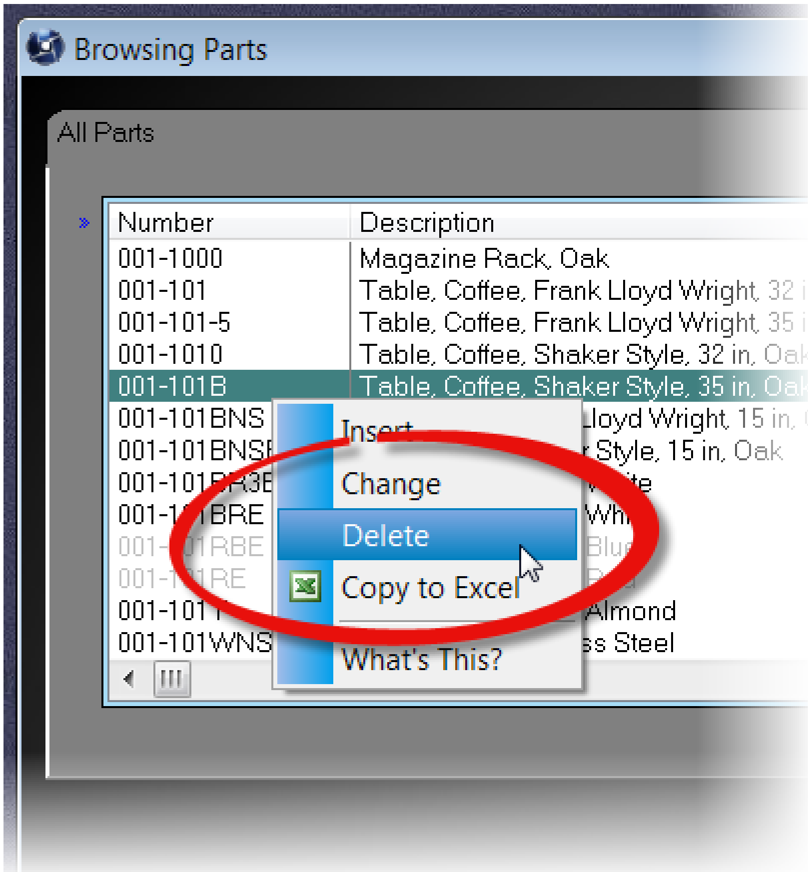
Adding an item to a list is equally simple. There is no need to position the highlight bar where the new item should be inserted. MasterQ will handle that for you. But you must have *some* item in the list highlighted.

Press the Insert key or right click the list and choose Insert from the displayed menu. The appropriate entry form will be displayed.

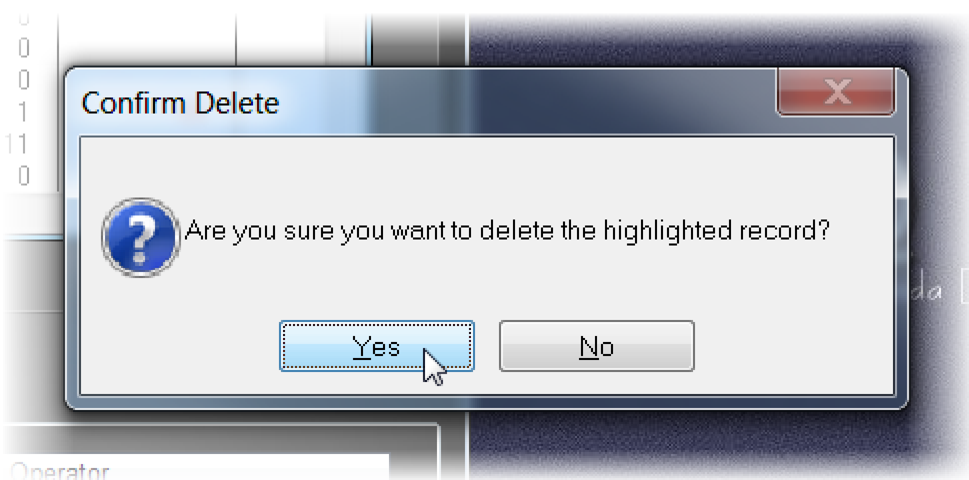
Some browse lists restrict *who* can create a new record. If your user record does not allow you to add the information, you will be unable to open the entry form. On right clicking, the Add option will be disabled.

Deleting an Item

Deleting an item from a list is equally simple. Right click the item you wish to delete and select the **Delete** command.



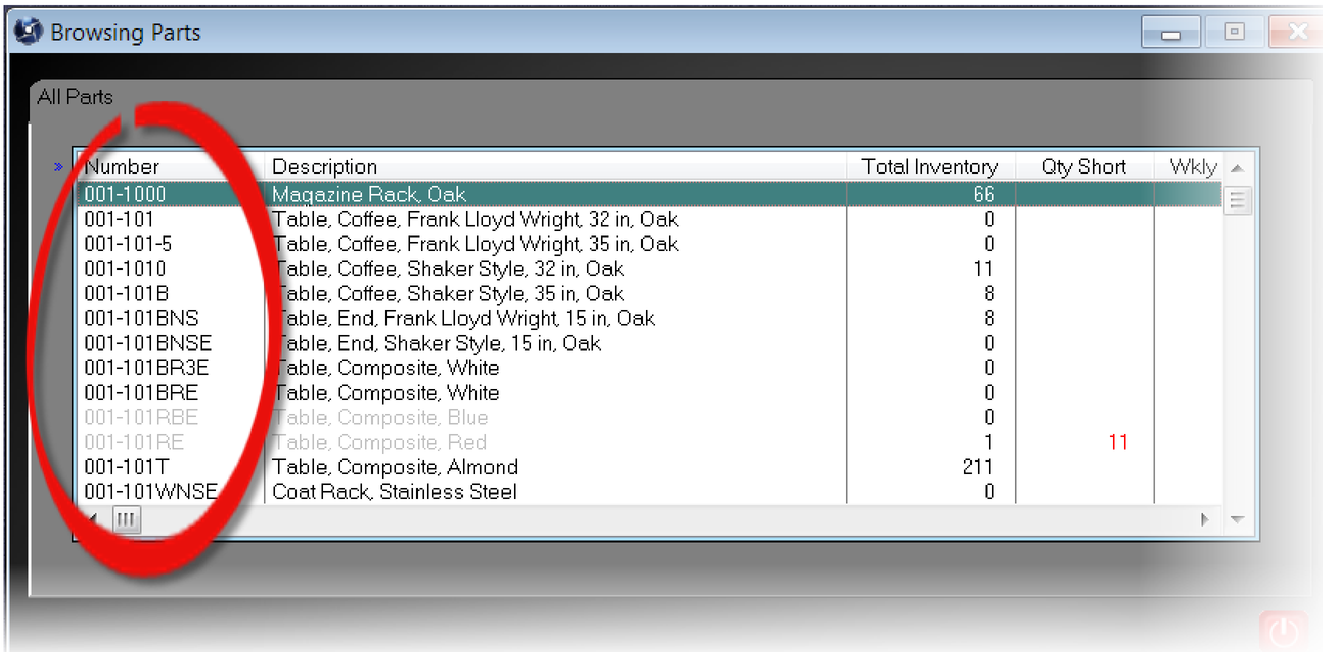
Or position the highlight bar on the item to remove and press the delete key on your keyboard. In both cases you will be asked to confirm the permanent removal of the item from your list.



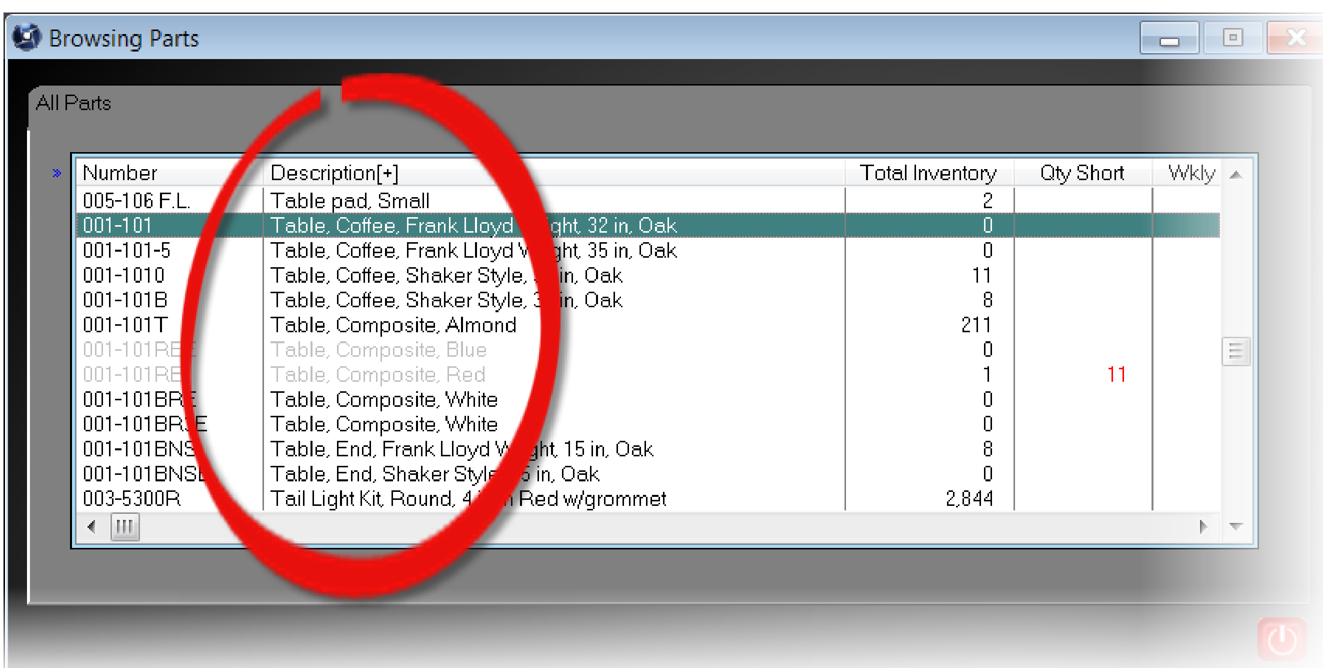
Some browse lists restrict *who* can delete a record. If your user record does not allow you to delete the information, you will be unable to remove the record. On right clicking, the Delete option will be disabled.

Sorting the Displayed List

Items start out listed in a particular order depending upon which list you are using. For example, when you browse parts, the items are listed in part number order.



But you can change the displayed order by clicking on the column header. For example, clicking on "Description" one time sort the list alphabetically by part description and will change the display to:



Note the small **+** sign to the right of the word Description in the table above. Clicking Description a second time will reverse the sort order.

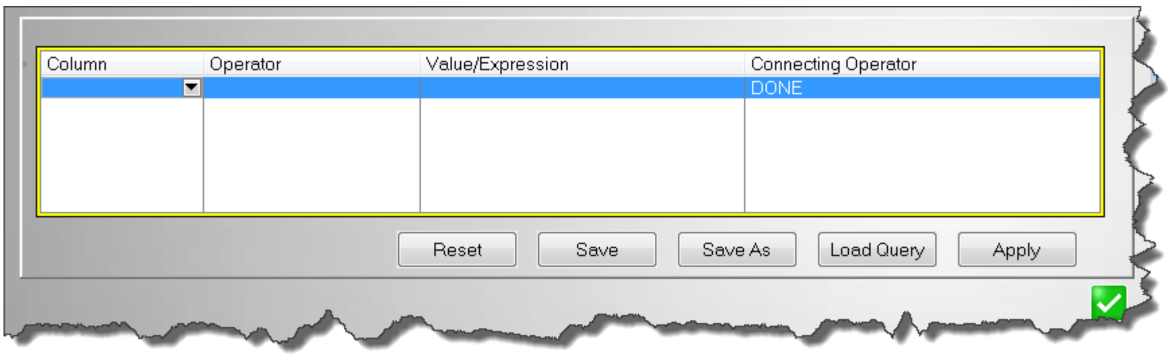
You can sort a list by multiple columns, too. For example, when browsing the list of People, you might wish to sort all people by company, then by last name, then by first name.

To do this, click the company name first, to sort the list by company. Then, holding the control key down, click on the Last Name column. Finally, again holding the control key down, click on the First Name column.

Filtering a List

There are two methods of filtering browse tables that may be found in Agenda Development software.

Query Center

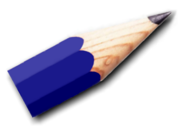


The query center offers a very comprehensive way to filter the displayed data. The query center will appear as the picture above, located just below your data. Double click under each heading to enter the match criteria. You can export the resulting data, sorted and filtered as displayed. See Exporting a Browse Table

Very complex filters can be created using this feature. Once completed, you can save the filter for future use by pressing the SAVE button. Filters are saved on the computer you save them from and do not interfere with filters created by other users. Unfortunately, the trade off is that these filters cannot be shared with other users.

Steps for Creating a filter:

1	**Select the column to filter**. Press the drop down arrow and choose the desired column.
2	**Choose an Operator**. This option is used to control whether items should be equal, less than, greater than, starts with, contains, etc when compared to the Value/ Expression
3	**Set Value/Expression**. Enter the text to match.
4	**Connecting Operator.** For simple filters, this will simply be set to "done". But you can filter for multiple conditions too. There are many options available. For example you could set the operator to AND to combine more than one expression.
4	**Apply**. Use the filter you have defined and show matching items.
5	**Save As**. Give the filter a name and save it for future use.
6	**Load Query**. Load a filter you have saved previously.



Filter Shortcut: you can drag an item from the displayed list and drop it onto the Query Center to save time and typing.

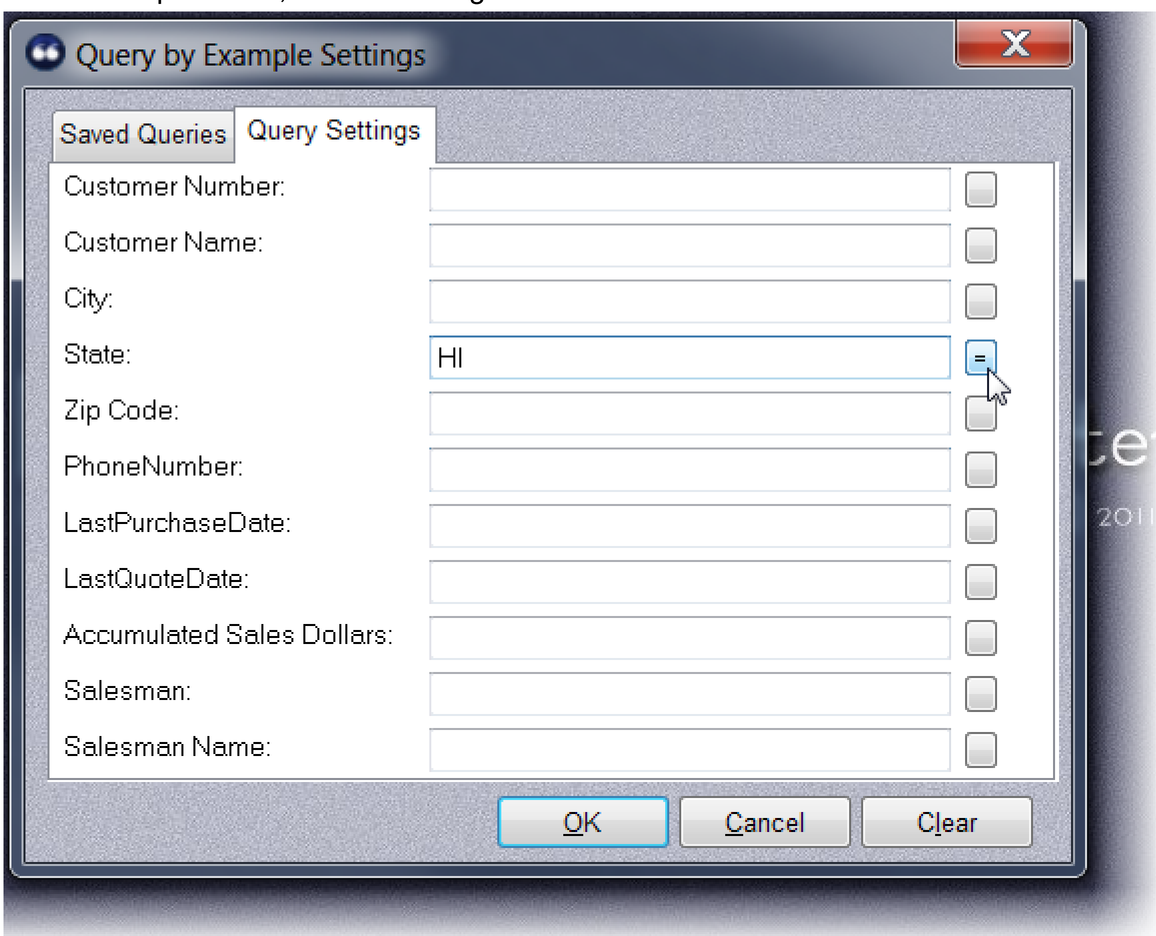
Query Button

Other times, a simpler, but less comprehensive method of filtering is offered by the Query button. This button is located in the lower left area of a displayed list of items.

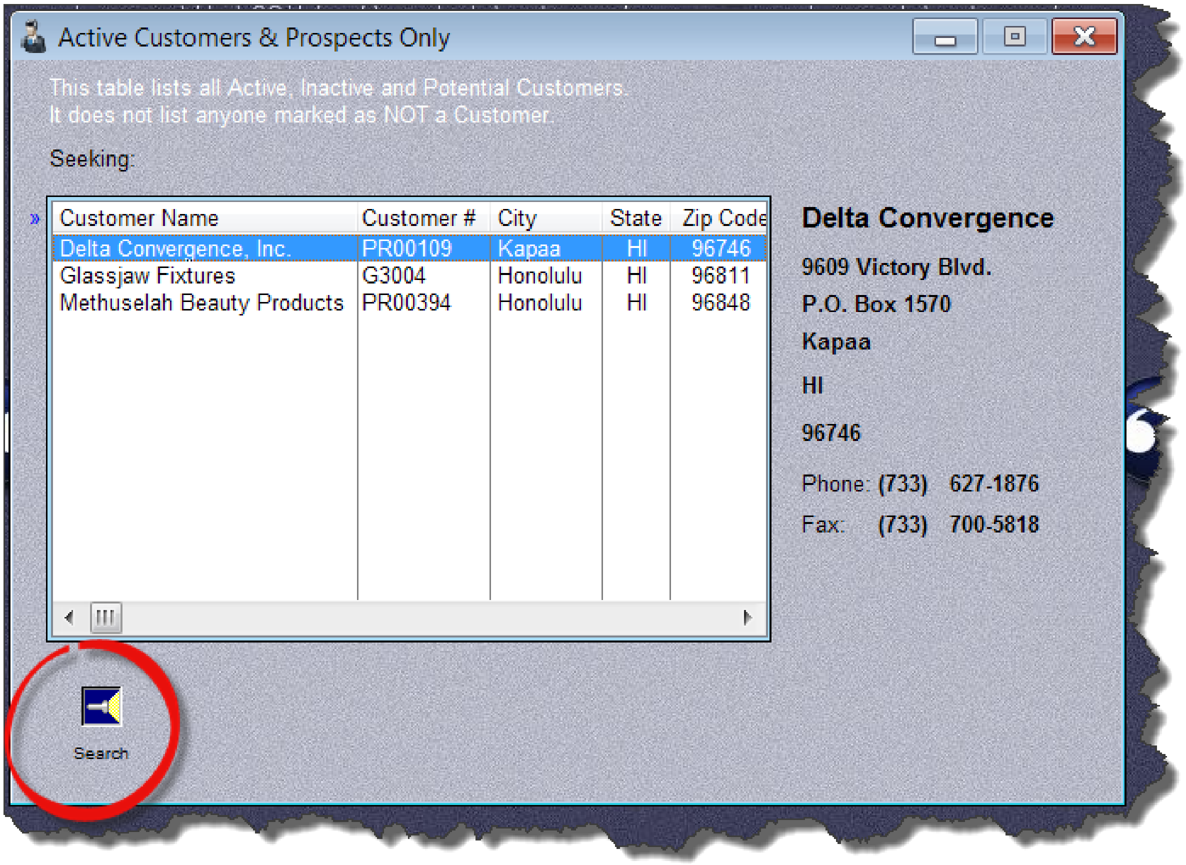
Press the Query button to display the filter form.
Note: The choices offered for filtering depend upon the list being viewed.

Enter the desired match condition in the appropriate field, then click the condition button on the right to cycle through the available search conditions such as equal to (=), greater than (>), greater than or equal to (>=), less than (<), less than or equal to (<=), not equal to (<>) or no filter (blank).

In the example below, we are filtering for customers in the state of Hawaii.

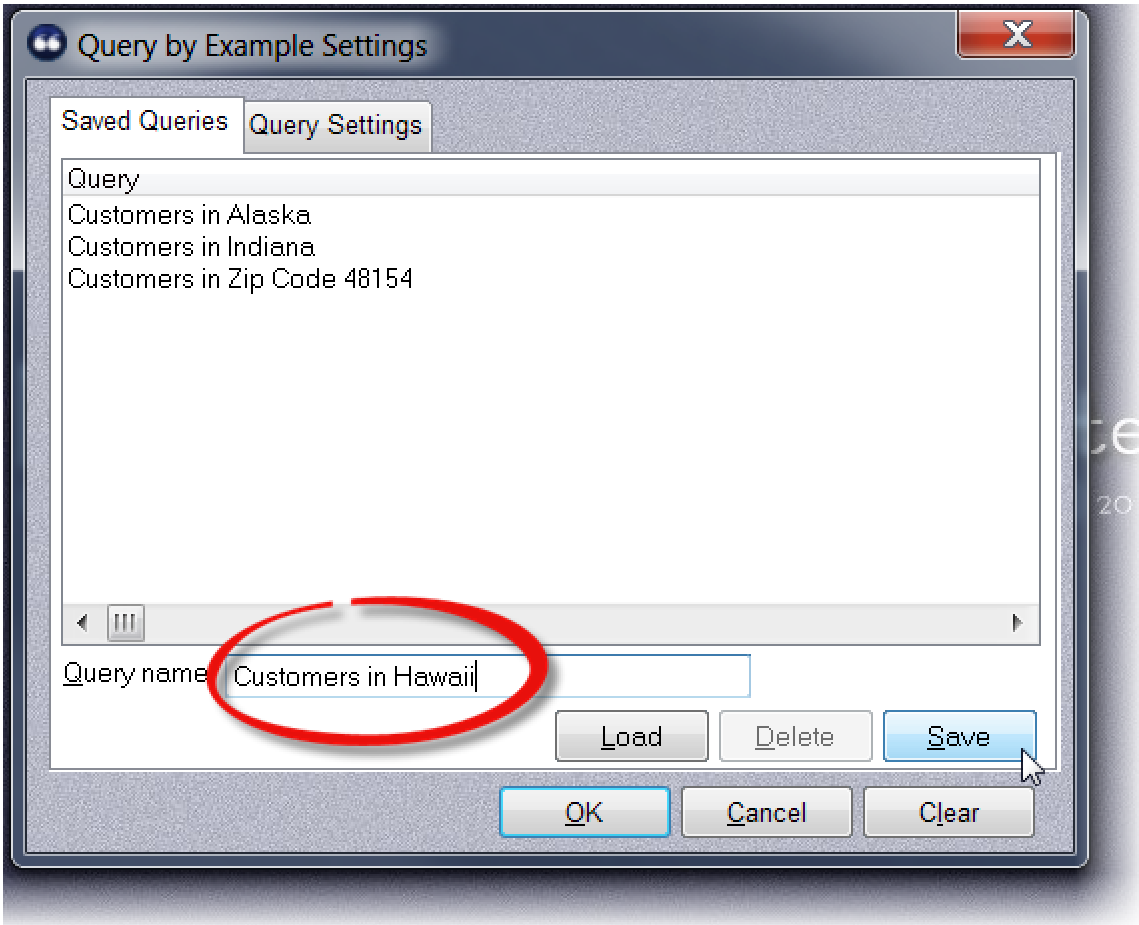


After pressing the OK button, your customer list might look like this:



Note that the search button now shows an illuminated flashlight indicating that a filter has been applied.

After you are satisfied that your search is displaying the items you wanted to see, you can save the filter for later use. To do this, press the Search button again then click on the **Saved Queries** tab. Give your filter a name and click the **Save** button.



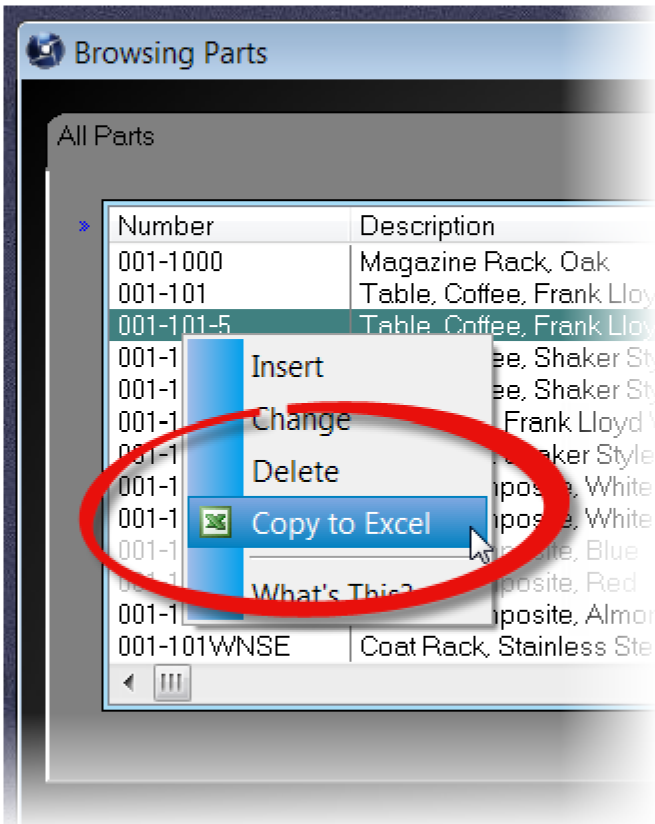
In the future, when you wish to view items that meet this filter condition, after pressing the search button, double click on one of the previously saved queries in the list.

The queries you create are saved on your local computer. So each user can create their own set of queries. But since they are on your local machine, if you sign into MasterQ from another computer on your network, your existing queries will not be shown.

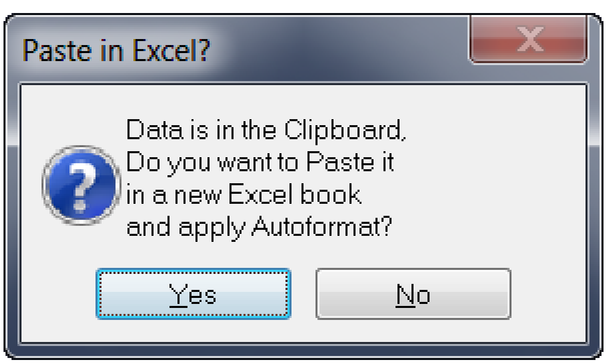
Exporting the Displayed List to Excel

After you've applied your desired filters and sorted the list as you wish, you can export this information to Excel if needed. (Actually, you don't need to apply filters or sort to export data.)

Right click in the list and select Copy to Excel from the menu.



MasterQ will copy the displayed information to the clipboard and ask you to confirm that you wish to open Excel and insert this information.

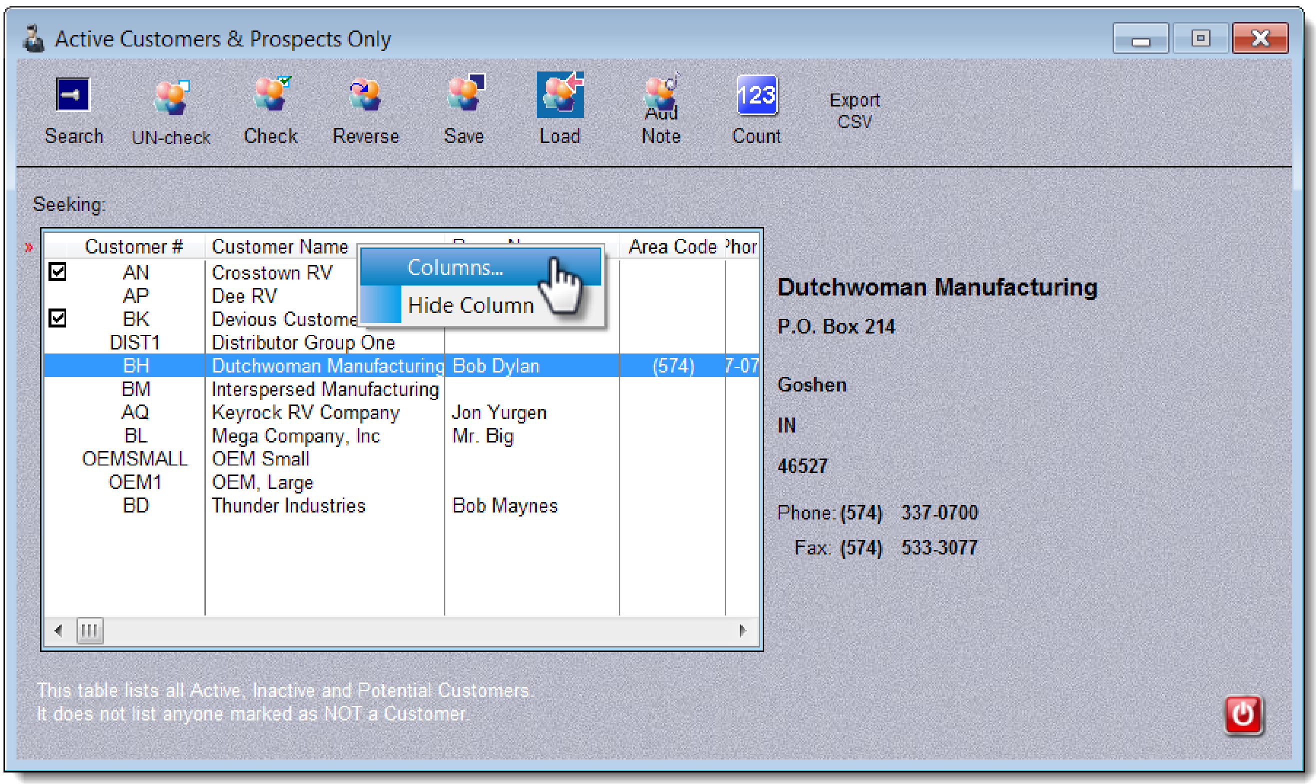


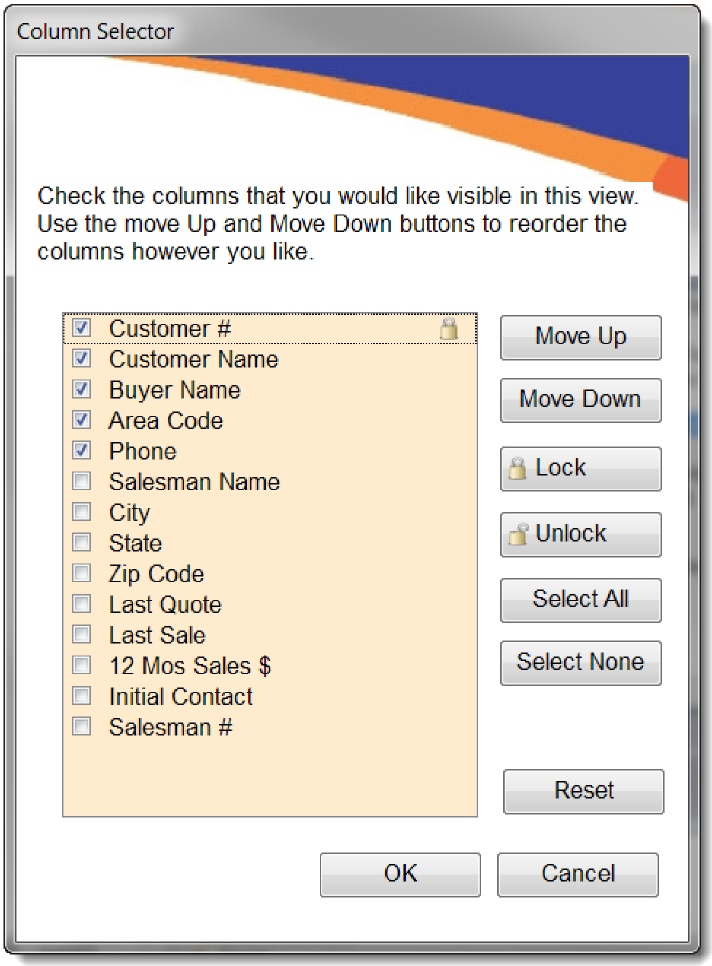
Once the data is in Excel, you are free to print, save, create charts... anything that Excel can do.

Customizing Displayed Information

You can control *what* is displayed in most browse tables as well as the order and column widths.

From most browse tables, right click on the column header:





Select the columns you wish to see by checking or un-checking the boxes.

Change the order by highlighting an item and using the Move Up and Move Down buttons.

You can freeze the left-most column(s) when you use the horizontal scroll bar by selecting the last column you wish to freeze and pressing the Lock button.

NOTE: The actual screen you may see may be different than the one shown on the left.

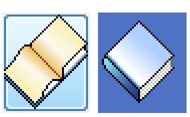
Notes

All Agenda Development programs use a common system to attach an unlimited number of notes to any object. Depending on the program you are using, you can attach notes to Customers, Parts, Work Centers, Quotes, Customer Returns, Salesmen, People, Nafta forms, and many others. These notes can be set up to only be displayed to you. These notes can include a paragraph description explaining the note in detail and can also link to another document (such as a Word document, an Excel spreadsheet, an audio or video file, etc) for unlimited capabilities.

MasterQ-PRO and MasterQ-ENT also include the ability for notes to be designated as "Must View". A Must View note is **automatically displayed** anytime an item is referenced.

As an example, you might add a note saying that *Devious Customer, Inc.* always wants to negotiate prices. If the note is designated *must view*, then the note would be displayed anytime anyone started preparing a new quote for *Devious Customer, Inc*.

Must View notes also work with the *private* option, in which case the note would appear every time you accessed *Devious Customer Inc.* but not for other users of the program.



The Notes button is located in the lower left corner of each object record. If at least one note exists for this object, an open book icon appears on the button. A closed book icon indicates that no notes currently exist for this item.

Notes can be created manually by the User whenever needed. The date and time are automatically added to the note. Changes can only be made to notes by the User that created them or Super-Users.

Notes can also be created automatically by the system when certain events occur. Examples of these times might be when a quote is created, when a Customer Return Authorization is issued, when an inventory safety stock level is changed or when an engineering change is posted (depending upon which Agenda Development programs you have installed, of course). These automatic notes can be turned off an on using the **Tools|System Setup** command, although *your* User account must be designated as a Super-User or QMaster SuperUser to set these options. For instructions on setting the auto-note options, click here.

Notes may be viewed by clicking the book icon

Clicking the open book icon located in the lower left corner of a window will display any associated notes for that item. A closed book icon indicates that no notes are available. An open book tells you there are notes in the file. Notes are available for all users to view with a couple of important exceptions below.

Private Notes

A note marked as Private will only be displayed to the author or to Users who are designated as Super-Users or MasterQ Super Users. This may be helpful in limiting the number of displayed notes.

Requires Quote Authorization to View

A note marked as **Requires Quote Authorization to View** will only be displayed to users who are authorized to use the MasterQ program. Typically these would be notes related to customer pricing. Agenda Development offers a family of programs that streamline various office functions, but not all programs or users need access to your pricing information. For example, our NaftaBlaster uses the same customer database to create Nafta certificate of origin documents quickly. MasterQ typically adds notes to the customer file when quotes are created. Users who are given access to the NaftaBlaster may not necessarily be permitted access to your pricing. This feature allows you to enter notes regarding pricing without disclosing the information to every person using your system.

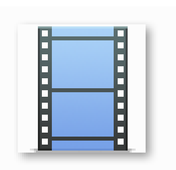
Must View Notes

A very handy feature is the Must View option for notes. Checking this box will force the note to be displayed anytime an object is accessed. For example, if you have a customer who requires freight charges to be included in quoted prices, you could add a Must View note explaining this. Anytime you begin to create a quote using MasterQ, the reminder note will pop up before you may proceed. This feature could also be used to remind you of the customer's credit status, or to remind you to refer the customer to a particular sales rep or distributor.

Who can Change or Delete a note?

When notes are created, a Delete Date can be specified. When that date is reached, the note is scheduled for removal and will be deleted without any further action. If no Delete Date is entered, the note will never be automatically erased.

Notes may also be removed manually. Agenda Development programs attach the user's initials to each note that is created. Only the user who originally created the note or a Super User can edit or delete it manually.

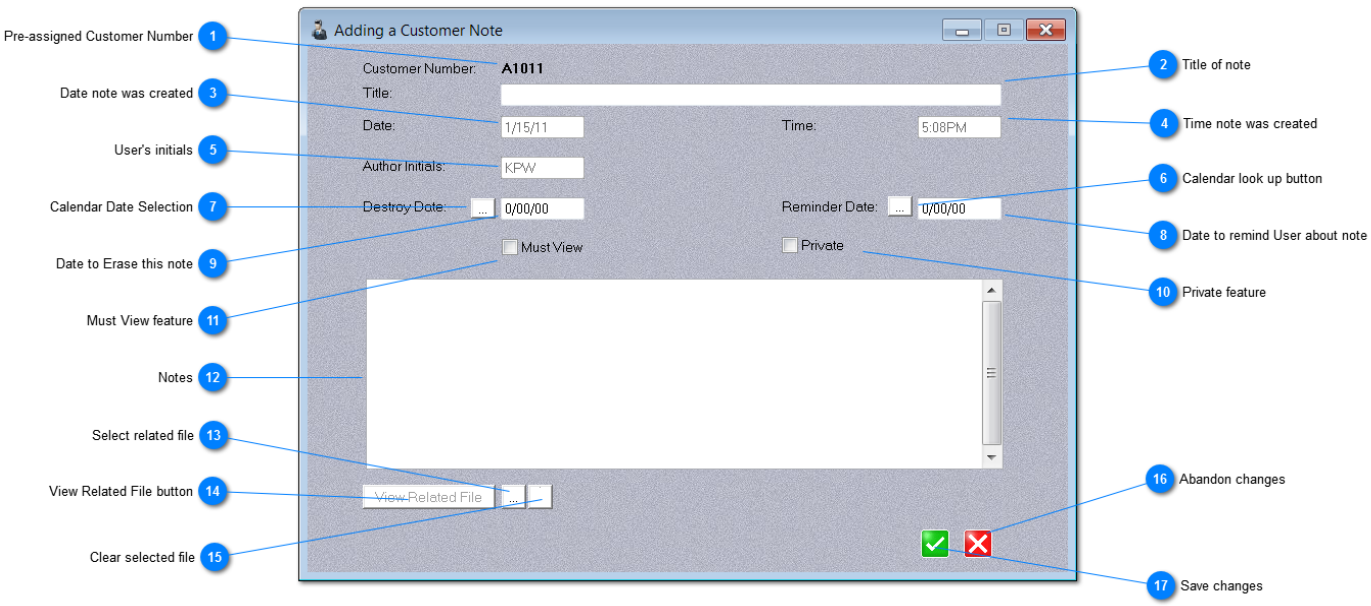


A short video demonstrates how notes can be used effectively. Click here.
Internet access required.

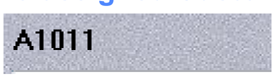
Next: Adding a Note window.

Adding a Note Window

This diagram shows a *Customer* note form, but the available fields are the same for any type of note you may be creating.



1 Pre-assigned Customer Number

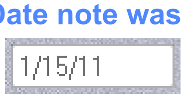


A unique number that ties the note to the related object. (a customer, in this case) This value is pre-assigned and cannot be changed by the user.

2 Title of note

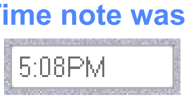
Description of the note that will appear in the Notes listing. Up to 100 characters.

3 Date note was created



The date of the note is set automatically and cannot be changed by the user.

4 Time note was created

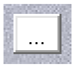


The time the note was created is automatically set by the program and cannot be modified by the user.

5 **User's initials**

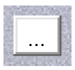
The user's initials (as set in the User record) are automatically inserted into the note and cannot be changed by the user.

6 **Calendar look up button**



Opens a calendar that may be useful in selecting a reminder date.

7 **Calendar Date Selection**



This button displays a calendar that may be useful in selecting an appropriate date to remove this note from the database

8 **Date to remind User about note**

Setting a reminder date here will insert a task in Microsoft Outlook with the due date you show here. If Outlook is not installed, this field is ignored.

9 **Date to Erase this note**

Agenda Development programs automatically remove old notes once they have past the Destroy Date you set here. NOTE: The notes may not be removed *exactly* on the Destroy Date, but could be removed at any time past the date you set here.

10 **Private feature**

Check this box and the note will only be displayed to the User who created it. (Super Users may also be able to view this note so it is best not to write nasty notes about your boss here.)

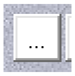
11 **Must View feature**

Check this box and the note will be displayed anytime someone uses this object.

12 **Notes**

Up to 1,200 characters may be entered here to explain the purpose of the note.

13 Select related file

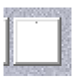


Browse files to select a related file. Files located in the installed folder or sub-folders will be viewable by all users of the program (unless the note is marked private). Files that are located in other folders are only visible from the originating computer. Example: a file located in your My Documents folder will only be accessible on your computer.

14 View Related File button

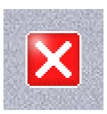
Once a related file is identified, pressing this button will load the appropriate program and display the related file. Any document that is recognized by your computer will automatically load the appropriate program. Examples: Word documents, Excel spreadsheets, PDF files, video files, sound recordings, etc.

15 Clear selected file



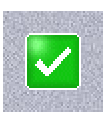
Press this button to clear the related file. NOTE: This does not *erase* the related file, it only removes the reference to the file in this note.

16 Abandon changes



Cancel the note without saving

17 Save changes



Press this button to save the note as you have written it.

Next: [Exporting a Browse Table to Excel]

Note Options & Tips

The note form may vary depending upon what type of object (customer, item, quote, salesman, etc) you are working with. But the general layout and options are very similar.

Notes may be viewed by clicking the book icon

Clicking the open book icon located in the lower left corner of a window will display any associated notes for that item. A closed book icon indicates that no notes are available. An open book tells you there are notes in the file. Notes are available for all users to view with a couple of important exceptions below.

Private Notes

A note marked as Private will only be displayed to the author or to Users who are designated as Super-Users or MasterQ Super Users. This may be helpful in limiting the number of displayed notes.

Requires Quote Authorization to View

A note marked as **Requires Quote Authorization to View** will only be displayed to users who are authorized to use the MasterQ program. Typically these would be notes related to customer pricing. Agenda Development offers a family of programs that streamline various office functions, but not all programs or users need access to your pricing information. For example, our NaftaBlaster uses the same customer database to create Nafta certificate of origin documents quickly. MasterQ typically adds notes to the customer file when quotes are created. Users who are given access to the NaftaBlaster may not necessarily be permitted access to your pricing. This feature allows you to enter notes regarding pricing without disclosing the information to every person using your system.

Must View Notes

The Must View option is a feature of MasterQ-PRO.

A very handy feature is the Must View option for notes. Checking this box will force the note to be displayed anytime an object is accessed. For example, if you have a customer who requires freight charges to be included in quoted prices, you could add a Must View note explaining this. Anytime you begin to create a quote using MasterQ, the reminder note will pop up before you may proceed. This feature could also be used to remind you of the customer's credit status, or to remind you to refer the customer to a particular sales rep or distributor.

Who can Change or Delete a note?

When notes are created, a Delete Date can be specified. When that date is reached, the note is scheduled for removal and will be deleted without any further action. If no Delete Date is entered, the note will never be automatically erased.

Notes may also be removed manually. Agenda Development programs attach the user's initials to each note that is created. Only the user who originally created the note or a Super User can edit or delete it manually.

A short video demonstrates how notes can be used effectively. Click here.
Internet access required.

Next: Adding a Note window.

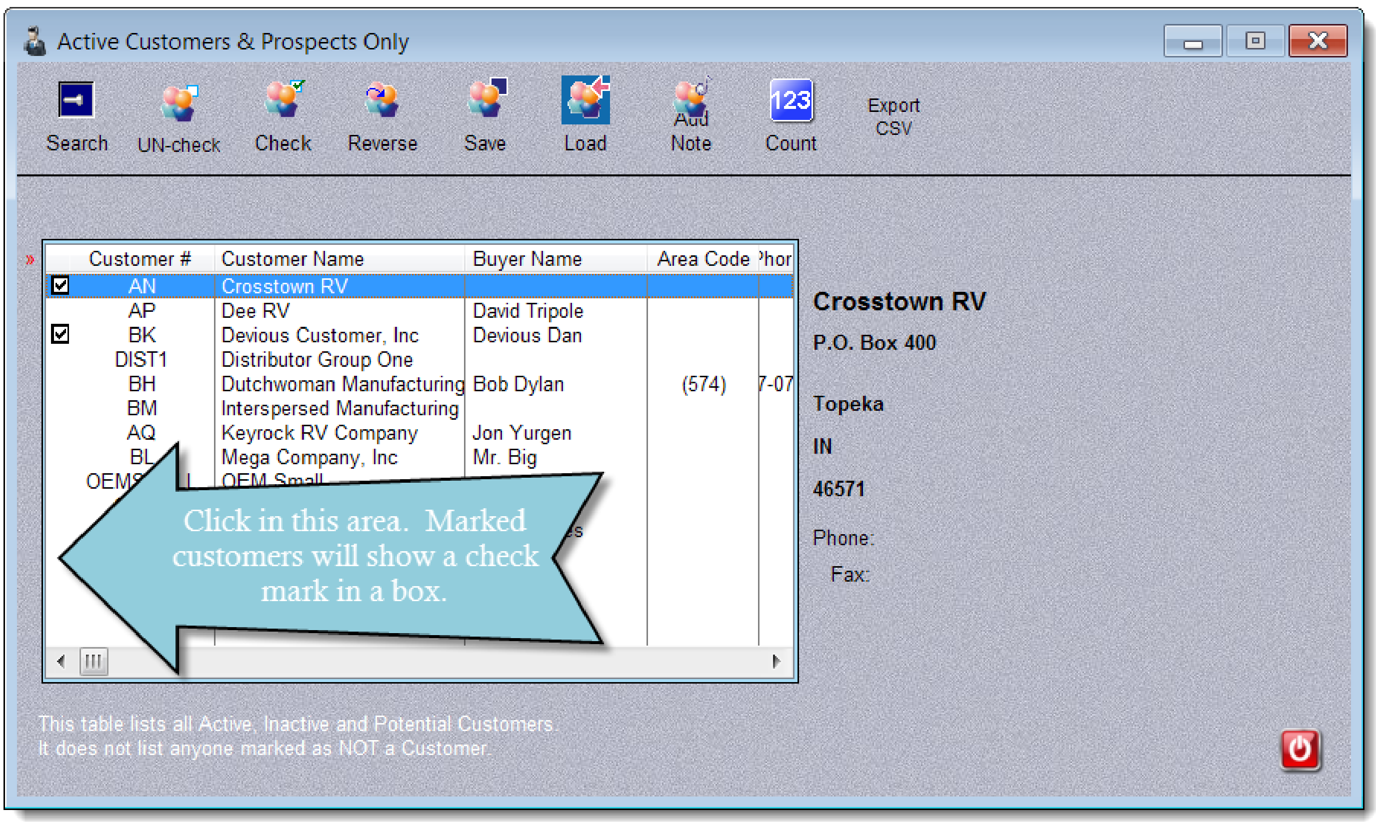
Creating Multiple Notes

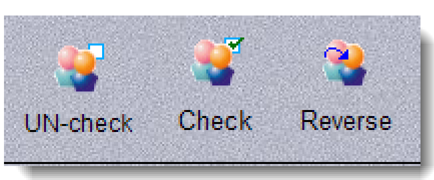
MasterQ-ENT includes a feature that lets you apply identical notes to multiple selected customers or people at one time. All the usual features available to you when creating a regular note are included.

Applying Multiple Customer Notes

This feature allows you to select a group of customers and create an identical note for each one. This feature is available in MasterQ-ENT.

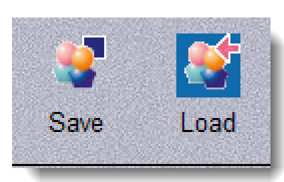
The first step in creating multiple customer notes is to identify which customers you wish to add a note to. This is referred to as "marking" a customer. The most direct way to mark a customer is to click in the customer browse in the far left column by the desired customer's name.

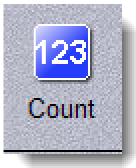




You may un-mark all <u>displayed</u> customers, mark all <u>displayed</u> customers, or swap their marked status using the UN-Check, Check & Reverse buttons. These actions apply only to customers currently displayed. You can filter the customers currently displayed by using the Search button.

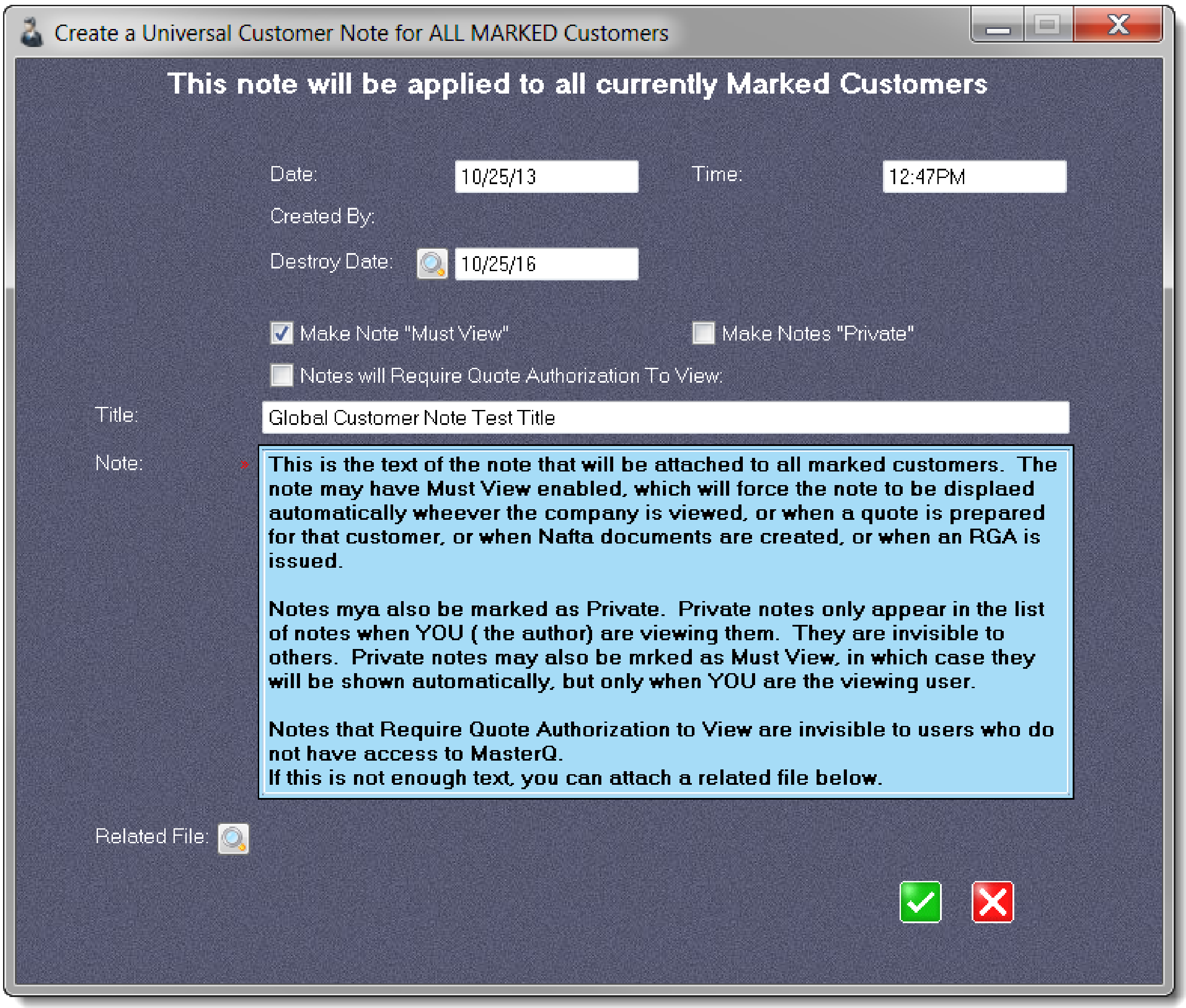
The save and load buttons "remember" your current list of marked customers. When they are *loaded*, you are given the option of marking, unmarking, or flipping the current status of the customers being loaded.





The count button gives a quick count of the number of customers you have currently marked and the total number of customers in your database.

Pressing the Add Note button will present you with a note form with then typical note entries.



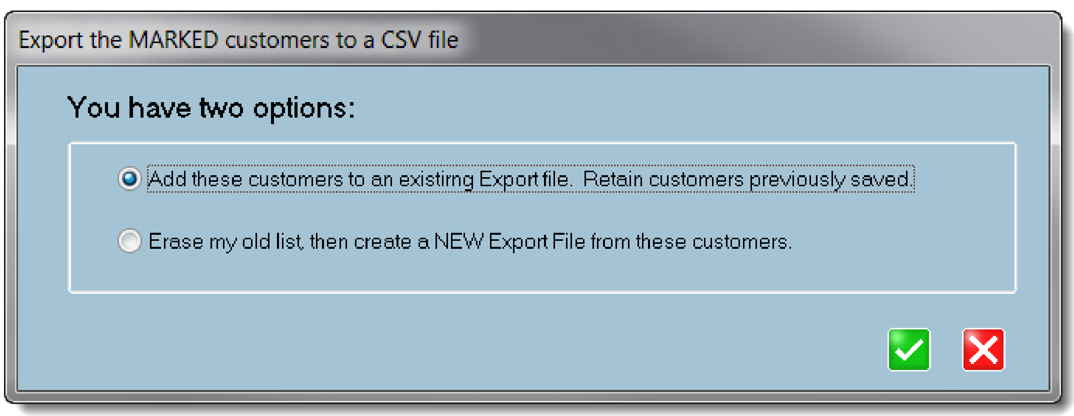
Pressing the OK button creates an identical note for each marked person.

The Export CSV button saves the currently marked customers in a CSV (comma separated values) file of your choosing. This can be useful for creating mail merge applications.

The following information is exported:

- Company Name
- Address (line 1)
- Address (line 2)
- City
- State
- Zip Code
- Area Code
- Phone number

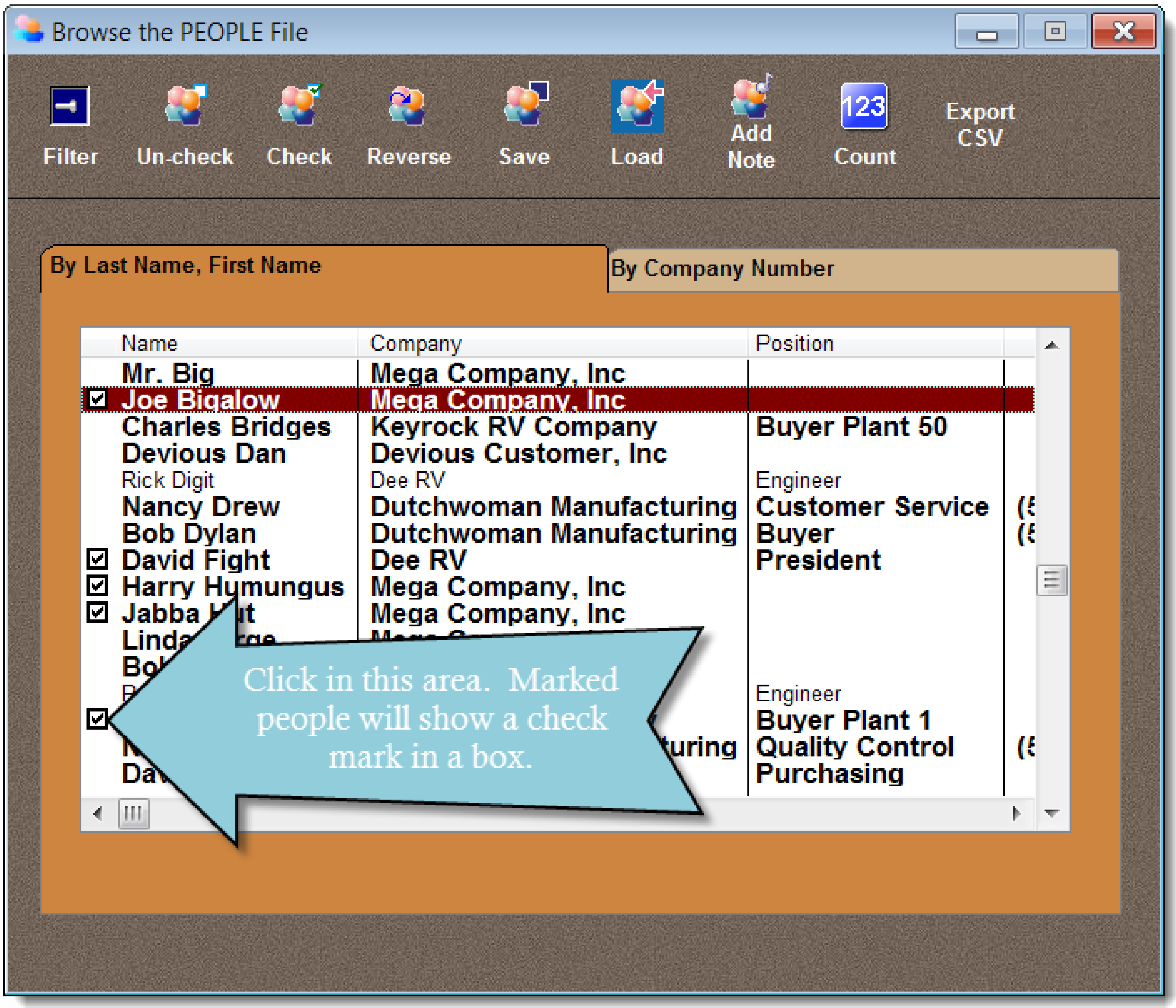
You have the option of adding the marked names to the current file or replacing the current file with these marked names.

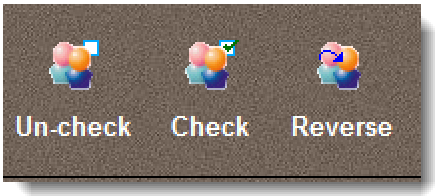


Applying Multiple People Notes

This feature allows you to select a group of people and create an identical note for each one. This feature is available in MasterQ-ENT.

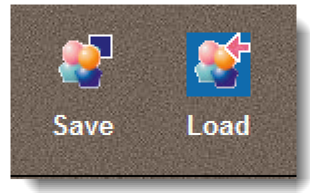
The first step in creating multiple people notes is to identify which contacts you wish to add a note to. This is referred to as "marking" a contact. The most direct way to mark a contact is to click in the people browse in the far left column by the desired person's name.



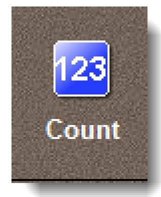


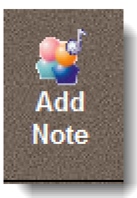
You may un-mark all displayed people, mark all displayed people, or swap their marked status using the UN-Check, Check & Reverse buttons. These actions apply only to people currently displayed. You can filter the people currently displayed by using the Search button.

The save and load buttons "remember" your current list of marked customers. When they are *loaded*, you are given the option of marking, unmarking, or flipping the current status of the customers being loaded.

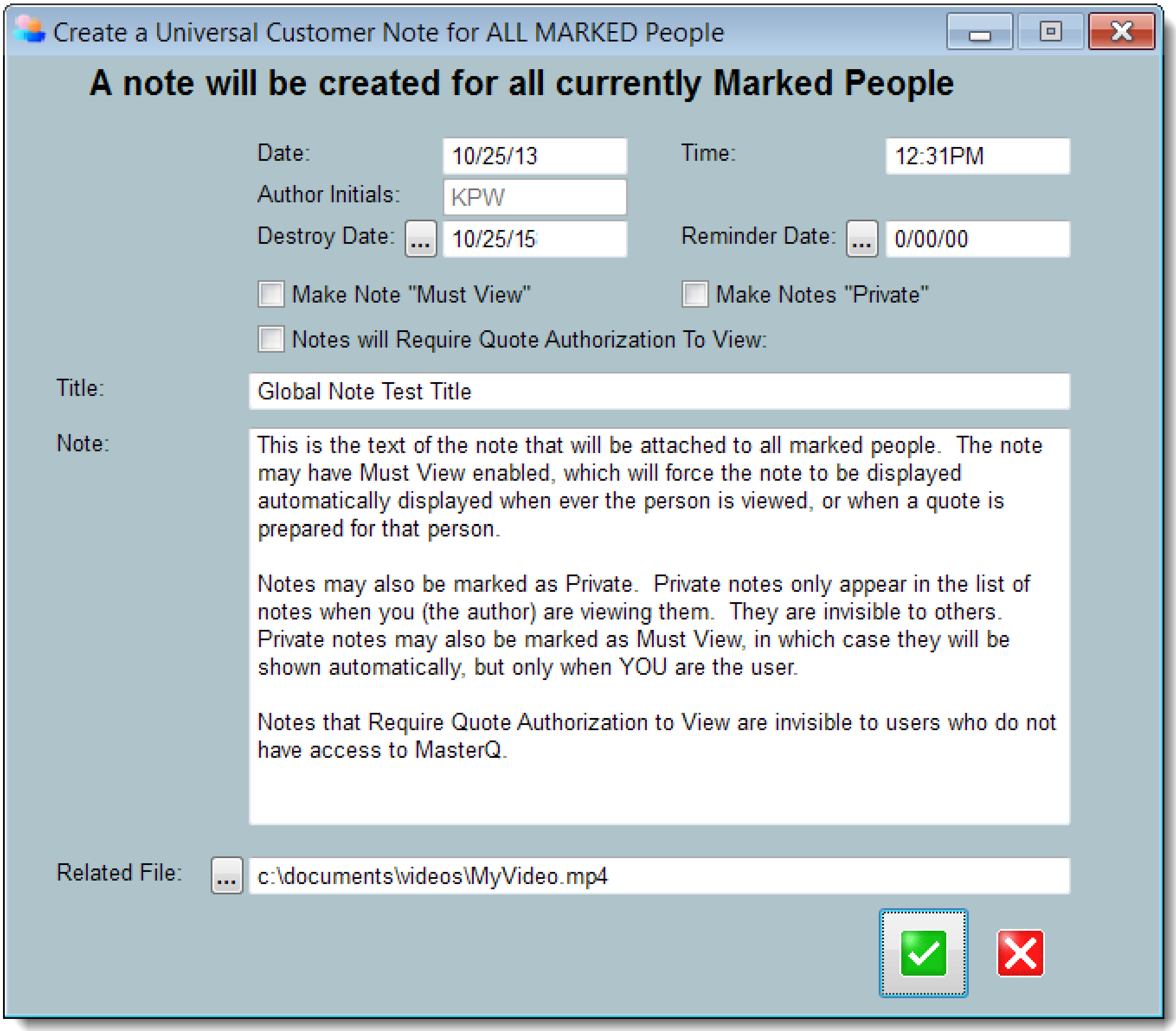


The count button gives a quick count of the number of people you have currently marked and the total number of people in your database.





Pressing the Add Note button will present you with a note form with then typical note entries.



Pressing the OK button creates an identical note for each marked person.

Linking Documents to Items

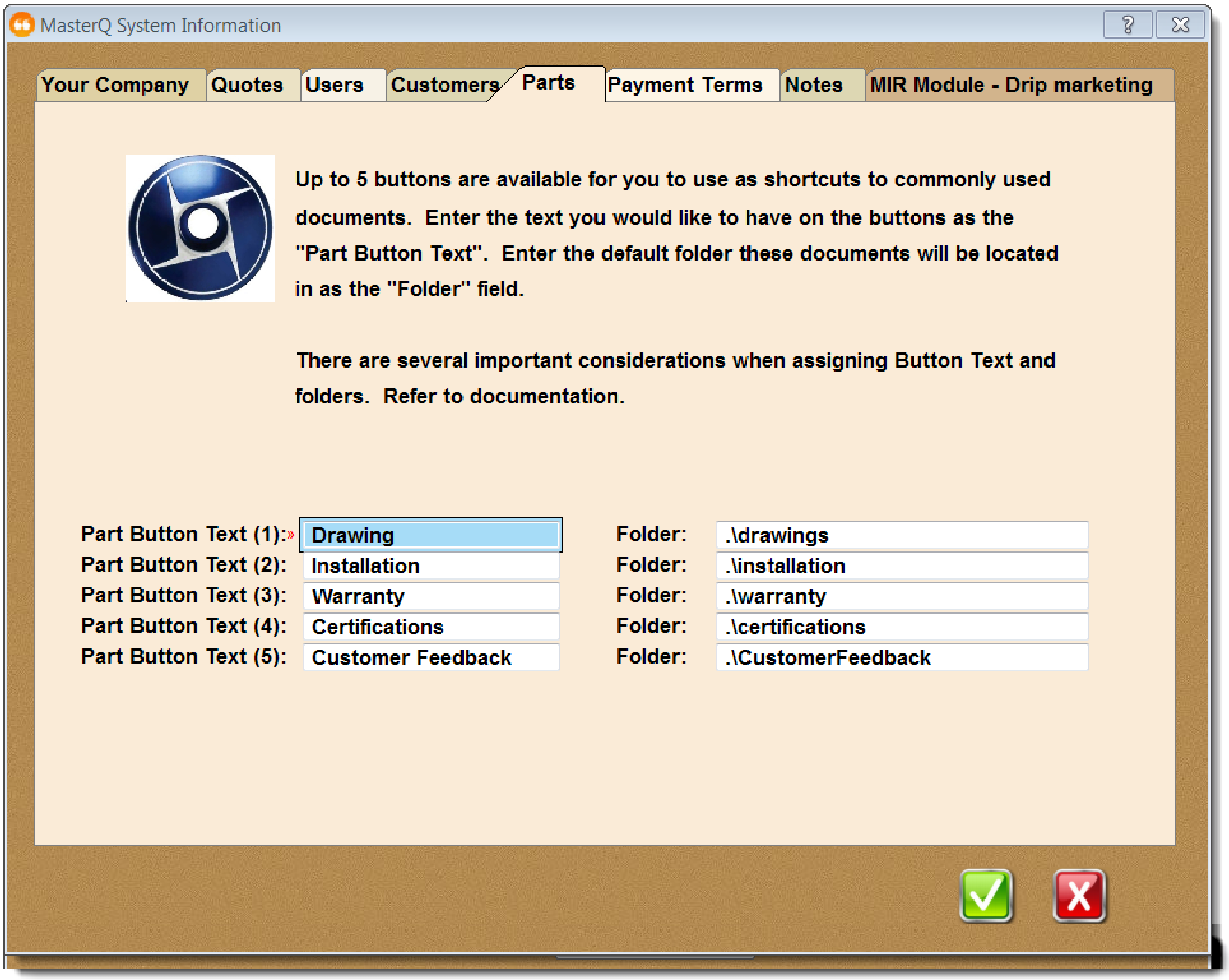
Accessing documents quickly is critical. MasterQ lets you assign multiple buttons to call up the documents you need with one click of the mouse. There are five available buttons that are displayed on your item records.

What sort of documents can be assigned? All types, including Word documents, Excel spreadsheets, even audio or video recordings. If you can open the file up by double clicking on it using Windows Explorer, then it can be assigned to a button in MasterQ.

Next: Assigning Buttons

Assigning Buttons

You can assign any name to these short-cut buttons. You may also identify the default folder where these documents will be stored. These choices are set using the Tools|System Set Up commands on the main menu and selecting the Parts tab.



The folder you specify will be used as the default file location. When the user presses the Warranty button (in our example above), MasterQ will start searching in the Warranty folder located in the MasterQ installation folder.

It's a good idea to *think* before you start assigning button labels. You *can* change them later, but what if documents have already been assigned and the the button label is changed?

Personal Shortcut Menus

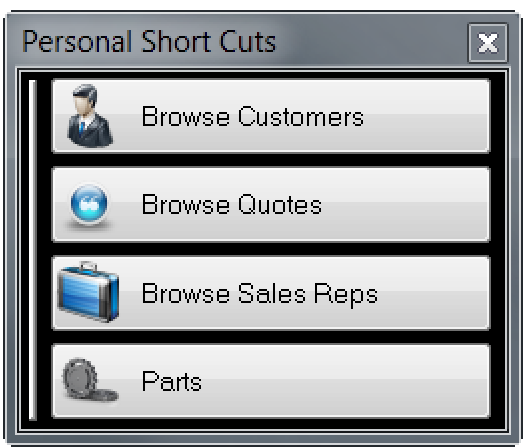
All Agenda Development programs include a Personal Shortcut Tear-Off menu. This feature enables each user to create their own unique set of short cut buttons to the tasks they perform most often. The user sees their shortcuts no matter which computer they log in from, but each user has their own set of shortcuts. Up to nine shortcuts can be created and they can be changed at any time.

Creating a new short cut...

Any menu item can be added to your tear-off menus.
(up to 9 short cuts can be created.)

Hold the control key down while you left click the desired command and it will be added.

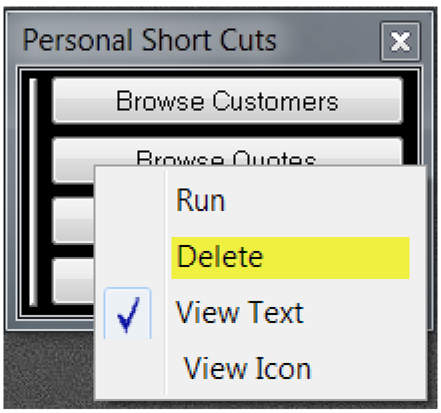
Modifying a short cut...



Many menu commands have icons associated with them. To display these icons on your short cut menu, right click any one of the displayed short cut buttons and select View Icon. Icons, if available, will be enabled for all of your buttons.

In some circumstances, such as computers with smaller screens, it may be desirable to *only* display the icons. To do this, right click any one of the short cut buttons and un-check View Text.

Deleting a Short Cut...



To remove a short cut from your tear-off menu, right click the button you wish to remove. Select Delete.

Temporarily Hide All Short Cuts...

If you temporarily need more screen real-estate, left click the red X in the upper right corner of the Personal Short Cuts window. The window will close, but your short cuts remain and will re-appear when you re-start the program.

The Short Cuts will also re-appear if you add another shortcut by control-left clicking the new command to add.

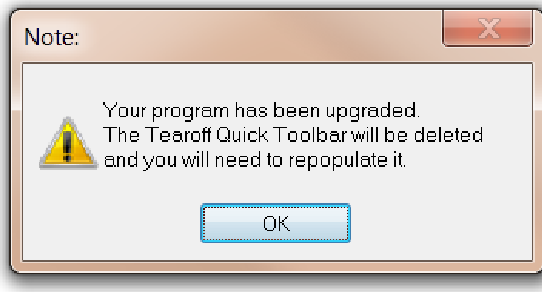
Permanently Remove All Short Cuts...

To keep the short cut menu from appearing at all, repeat the steps for Deleting a Short Cut above until all buttons have been removed. The Shortcut window will not appear when the program is re-started.

NOTE: You can always add buttons back at any time.

New Versions of MasterQ May Reset Your Short Cuts...

Future versions of the program <u>may</u> change the menu system. If this happens, you will see this message when you start MasterQ. If you see this message, you will need to re-create your personal short cuts.



Next: Notes

Quote Templates

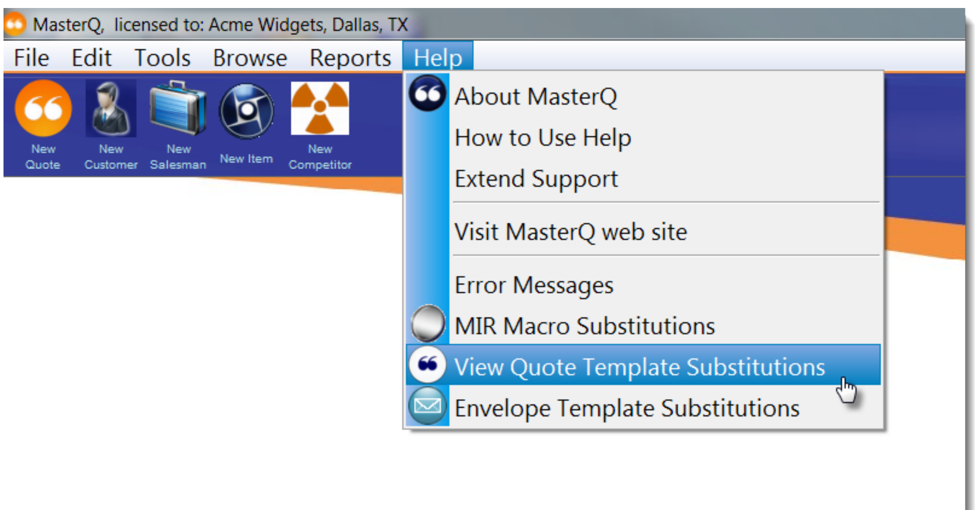
Introduction to Quote Templates

To offer you complete design control, MasterQ uses Microsoft Word to create your quotes. A basic design/ format is used as a starting point. We refer to these as quick-start templates.

The Quote Template is a Word document that is used to create new quotes. Think of it as intelligent stationary. The template consists of the design details of your quote, such as you company logo, or perhaps a second page of terms and conditions, or your name, title and signature as well as the detail from the quote. You can choose any fonts, colors or wording as you desire.

Quote Templates are Totally Flexible

When a quote is created using MasterQ, the Quote Template is the starting point. There are a large number of special details that will be automatically inserted into your quote as needed. You include special place-holders into your template and when the quote is created they will each be replaced by the appropriate values for *that* quote. You can view the entire list of substitution tokens from the Help|View Quote Template Substitutions command on the main menu.



Multiple Templates

You will assign one quote template as the default template for all users using by modifying the System record. But each user may be assigned their *own* template that might include their signature line, graphic, etc. It is easy to have any number of special quote templates and to select the desired template when needed.

Next: Modifying Quote Templates

Customizing Quote Templates

Modifying your quote template to use your layout, text and graphics is not difficult if you are familiar with Microsoft Word. If you prefer, Agenda Development can do this for you quickly and economically. Contact sales for more information.

Quote Templates Use the DOC Format

MasterQ uses the DOC format, sometimes referred to as Word 97. Using DOC rather than the newer DOCX format insures that all other users on your network as well as all of your customers (if you email your quotes as Word documents) will be able to view the finished quotes regardless of which version of Word they might have on their computer. We recommend that Quote template documents should be saved in the DOC format.

Where to start

We recommend starting with a *copy* of the QUOTE.DOC file that is placed in your program folder when MasterQ is installed. After you have made modifications, save it as a different name such as OUR_QUOTE.DOC.

One Consideration

MasterQ places the name & address and the quoted items in specific tables in the quote. To be safe, do not add or remove tables from the document.

What belongs in the Quote Template?

Anything that is *usually* included in your quotes. What ever is in your quote template will be duplicated in every quote you create. Your quote template could include:

- Your company logo
- your address
- your phone and fax numbers
- your email address
- Teaser message to visit your website in the footer of the document
- Second page (or even third page) boiler-plate terms and conditions
- Return instructions

Where should the modified Quote document(s) be stored?
We recommend storing the quote templates in the folder where MasterQ is installed. This insures that the document is available from any computer on your network.

Next: Quote Template Substitutions

Quote Template Substitutions

When a quote is generated, tokens found in the Word document template are replaced with values from the quote form or the customer's record.

The substitutions use the same format as the tokens. For example, if the token is **bold**, *italic*, underlined or red, the substituted value will be **bold**, *italic*, underlined and red. Capitalization does not matter and is not considered.

All occurrences of the token are replaced throughout the entire document.

You do not need to use all of the tokens. Those that don't exist in your quote template are ignored.

The following words can be placed anywhere in the quote template and will be replaced as noted:

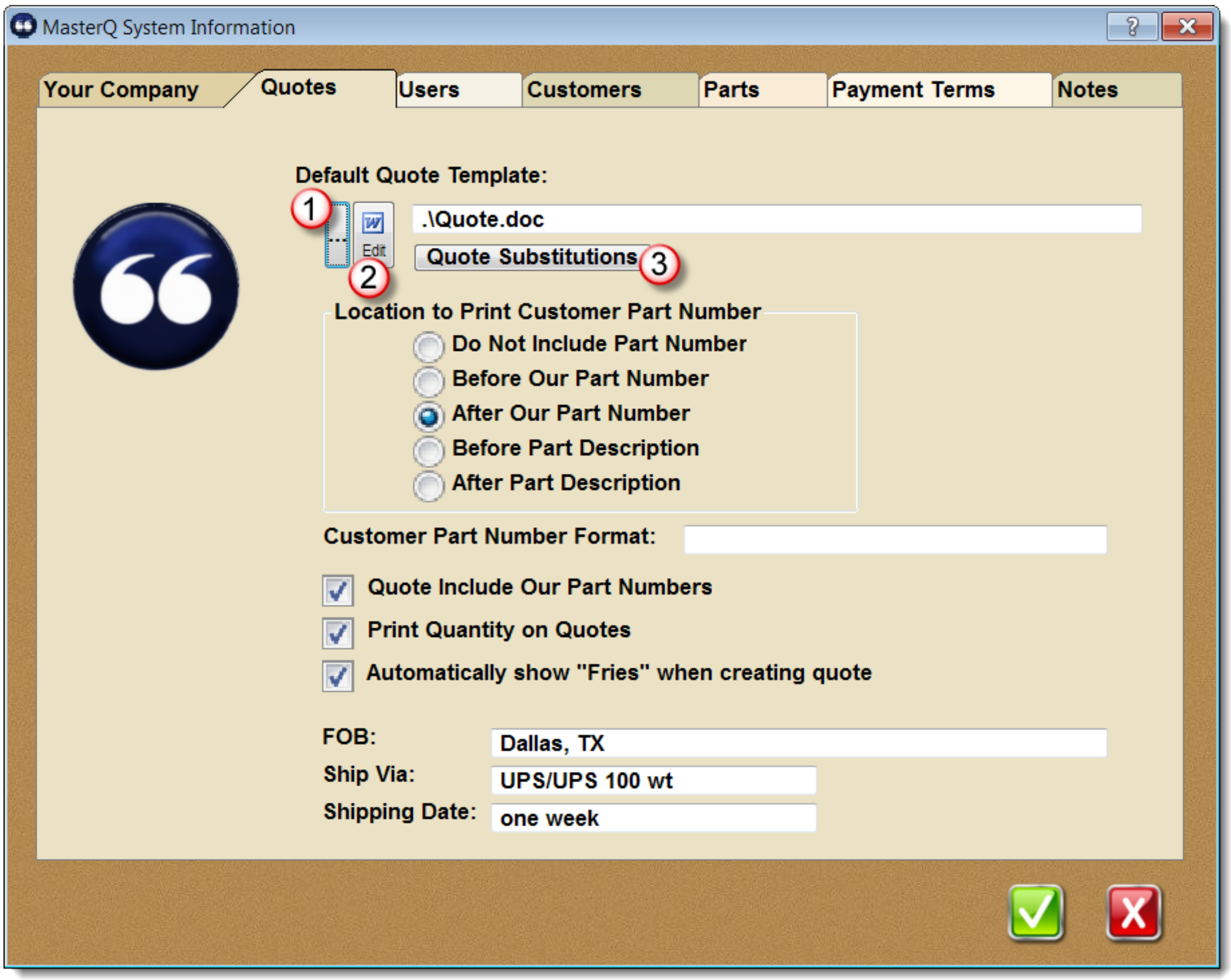
$Contact	the name of the person the quote is addressed to
$QuoteDate	the date the quote was created
$ShippingDate	the entry you set for Shipping Date on quote
$ShipVia	how the item will be shipped
$FOB	FOB point specified on the quote
$Terms	The payment terms specified in the quote
$Salesperson	The name of the salesman specified in the quote
$QuoteNumber	The unique number for this quote
$CustomerNumber	The unique number used to identify this customer in MasterQ
$TaxExemption	The tax id in this customer's record
$EffectiveDate	The effective date for new pricing to be applied
$FaxAreaCode	The area code of the customer's fax number
$FaxNumber	The customer's 7 digit fax number without the area code
$AreaCode	The three digit area code for the customer's phone number.
$PhoneNumber	The customer's 7 digit phone number without area code.

$DeliveryDay	The day of the week you deliver to this customer.

Next: Setting a Default Quote Template for All Users

Selecting a default quote template for all users

By selecting a Default Quote Template in the System Set Up, every user will use that template unless the user has selected a unique Quote Template in the User record.



Look up button - this button allows you to browse your computer to select the Word document to use as the default quote template.

Edit button - press this button to open the quote template you have selected above to make changes.

Quote substitutions - this button will display a PDF listing all of the available substitution tokens available for you to use.

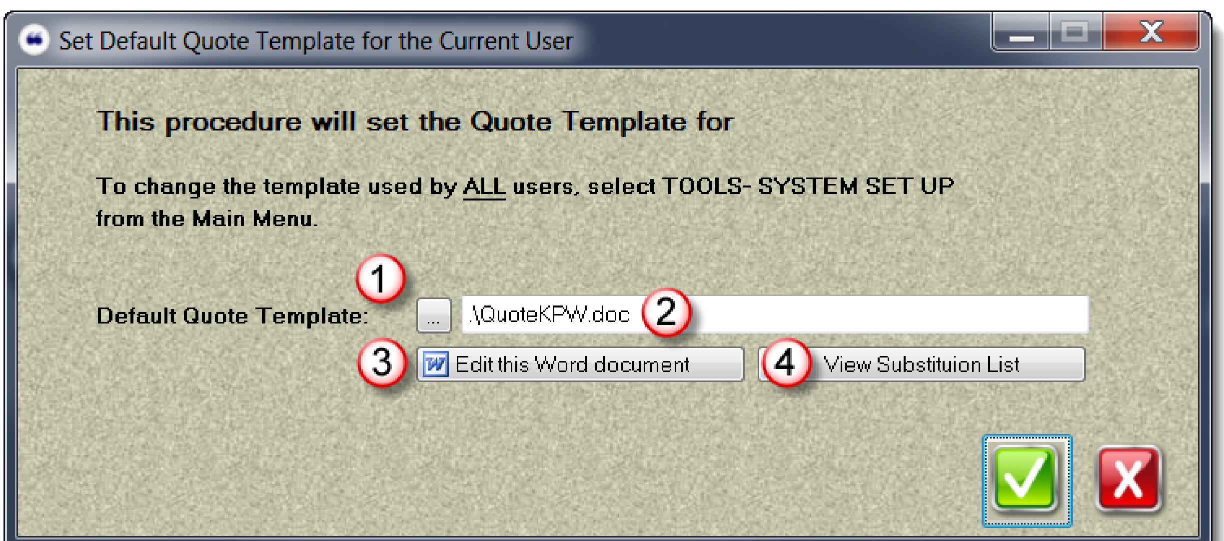
Next: Setting the Quote Template for a Single User

Setting the Quote Template for Single User

The default quote template for all users is set globally, but you can set different templates for each user if you wish. If you do not specify a *different* template, the global template will be used.

Examples of modifications you might make for individual users might be adding their name below a signature line, or even adding an image with their signature over the line.

To change the default template, the <u>user</u> should click on **Tools|Change Quote Template for User** command from the main menu.



Look up template document by browsing through folders.

2 or type in the filename and extension

3 Open the template in Word for modifications.

4 View PDF file listing all substitution macros. When quotes are created, these macros are replaced by the appropriate information for the particular quote you are creating.

If a unique quote template is not selected on this form, the user's quotes will be built from the template set in the System record. See more about the system record setting here.

MIR - Make It Rain

MIR stands for "Make It Rain", a group of tools included in the MasterQ-ENT version that automates customer contact and follow up.

These features include the ability to print an addressed envelope with one mouse click, design and implement structured Drip* follow up procedures, the ability to add identical notes to multiple customers at one time, as well as the ability to export selected names for use in external mail merge procedures.

*Drip marketing: a planned sequence of scheduled contacts with your prospect. Either by phone, mail, email or in-person visits.

Drip Marketing

Drip Marketing is a strategy that creates "drips", a set of pre-written messages to customers or prospects over a scheduled period of time. These contacts follow a pre-determined course and are dripped in a series applicable to the target customer.

In MasterQ, the follow up plan is referred to as a Drip Marketing Plan. Each plan consists of any number of Drip Steps. When a Drip Marketing Plan is applied to a person in your database, MasterQ creates a series of scheduled contacts. We refer to these pending contacts as the Drip Stream.

The Drip Marketing Plan could be as simple as one contact scheduled to execute immediately. An example of this might be an contact letter issued to a new customer listing key information such as their sales representative, important phone numbers, and initial credit authorized. It could be as complex as a plan for scheduling 12 contacts each one month apart.

When MasterQ creates a contact document from the Drip Stream, it uses a quick start template similar to the templates used to create quotes and envelopes. There are an extensive number of special items that you can insert into your Drip Step which will be replaced by the appropriate information for that particular customer when the Drip Stream is processed.

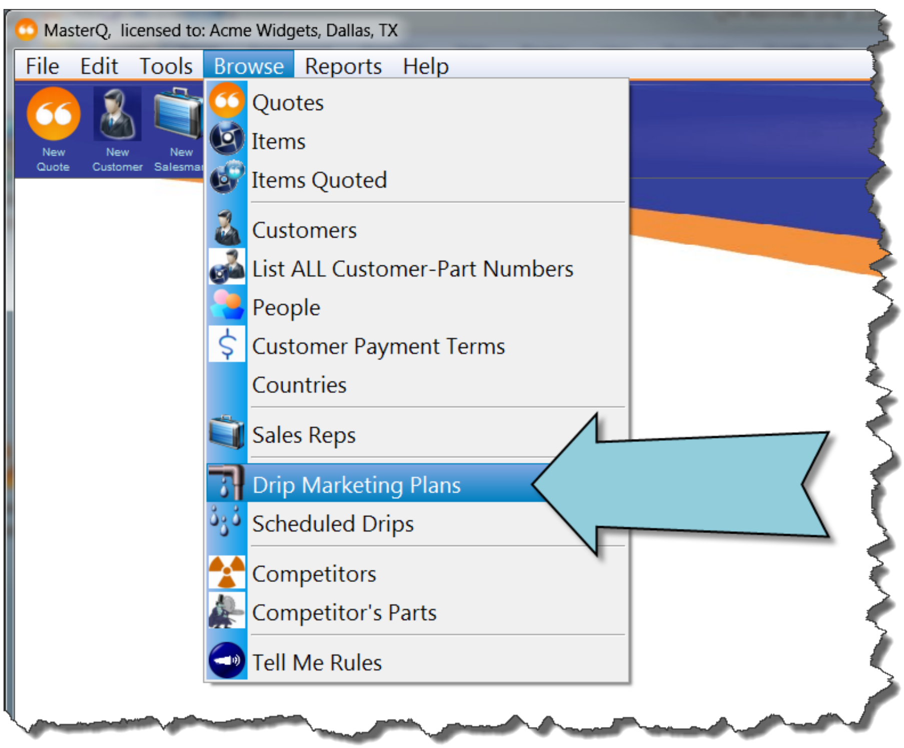
For items that we have not planned for, you also have the ability to create a user defined field applicable to a particular Drip Step. For example, if you wanted to prompt the creator to enter the color of the customer's car (for what ever reason), you could add that as a special field.

Creating a Drip Plan

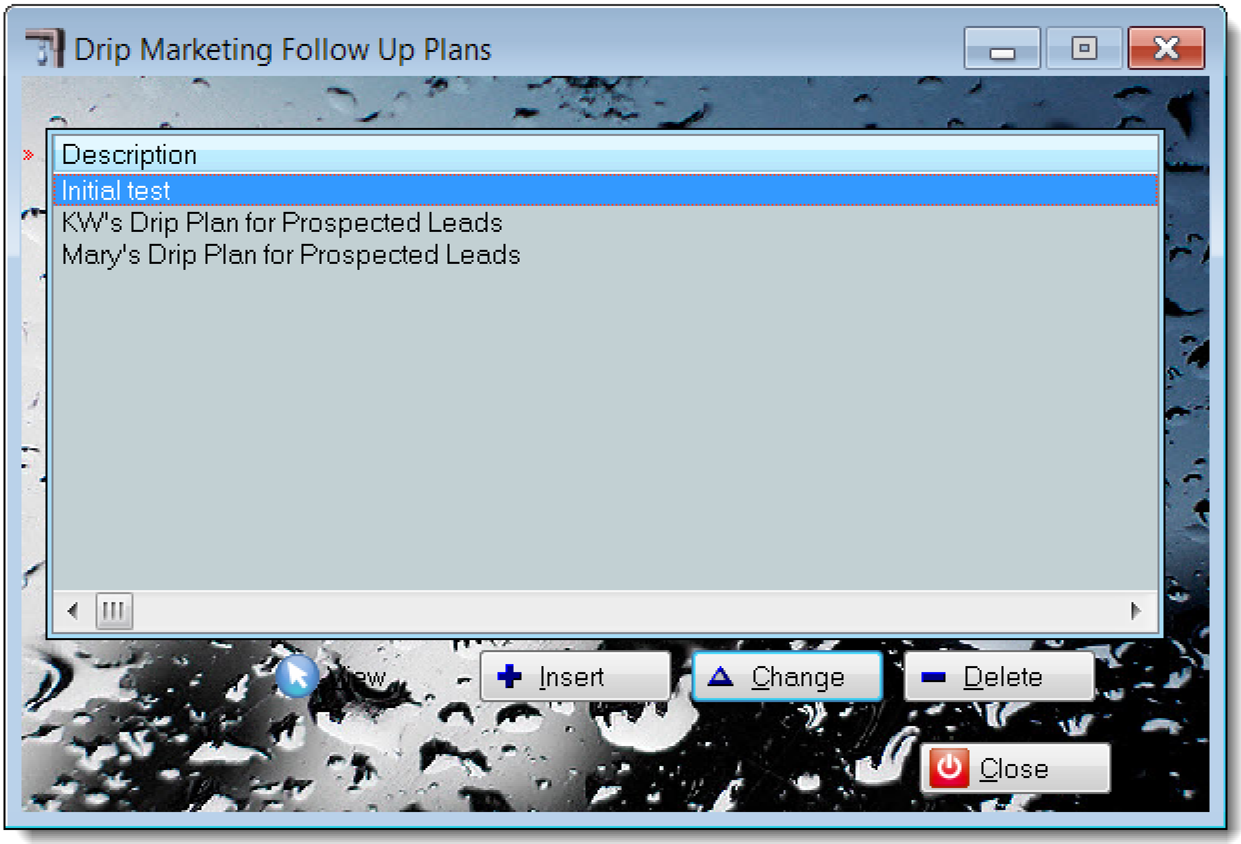
The Drip Plan is the grouping of a number of planned contacts that you schedule to occur in a certain time sequence.

We believe the easiest way to go about this is to create your quick start templates first. Saving each document in the Correspondence\Drips folder located in the folder where you installed MasterQ. Remember, that each of these drips you create does not necessarily need to be a letter or email. It could be a reminder to yourself to make a phone contact or schedule an in-person visit.

Select the BROWSE | DRIP MARKETING PLANS command from the main menu.

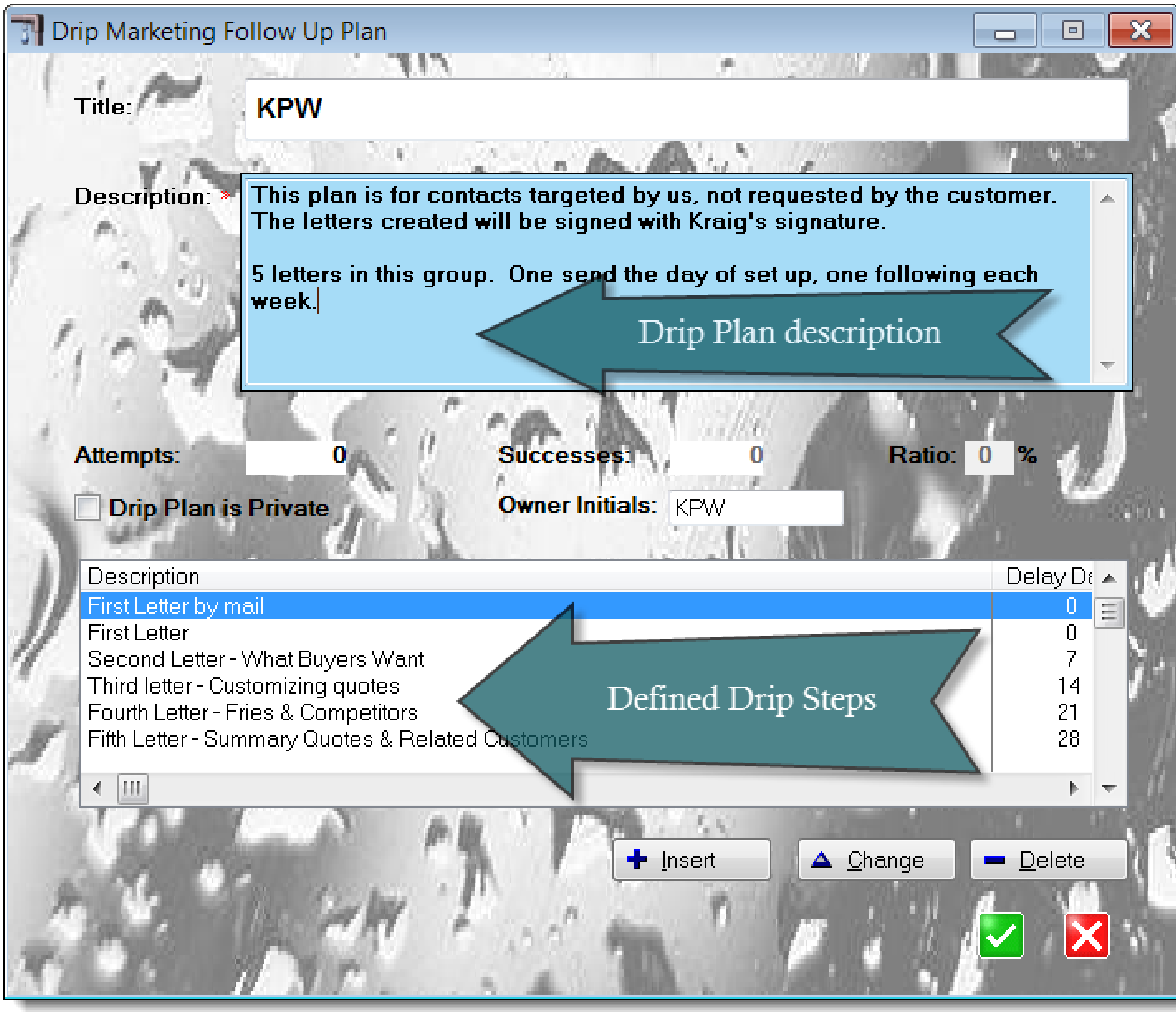


The Drip Marketing Plans that have been defined will be displayed.



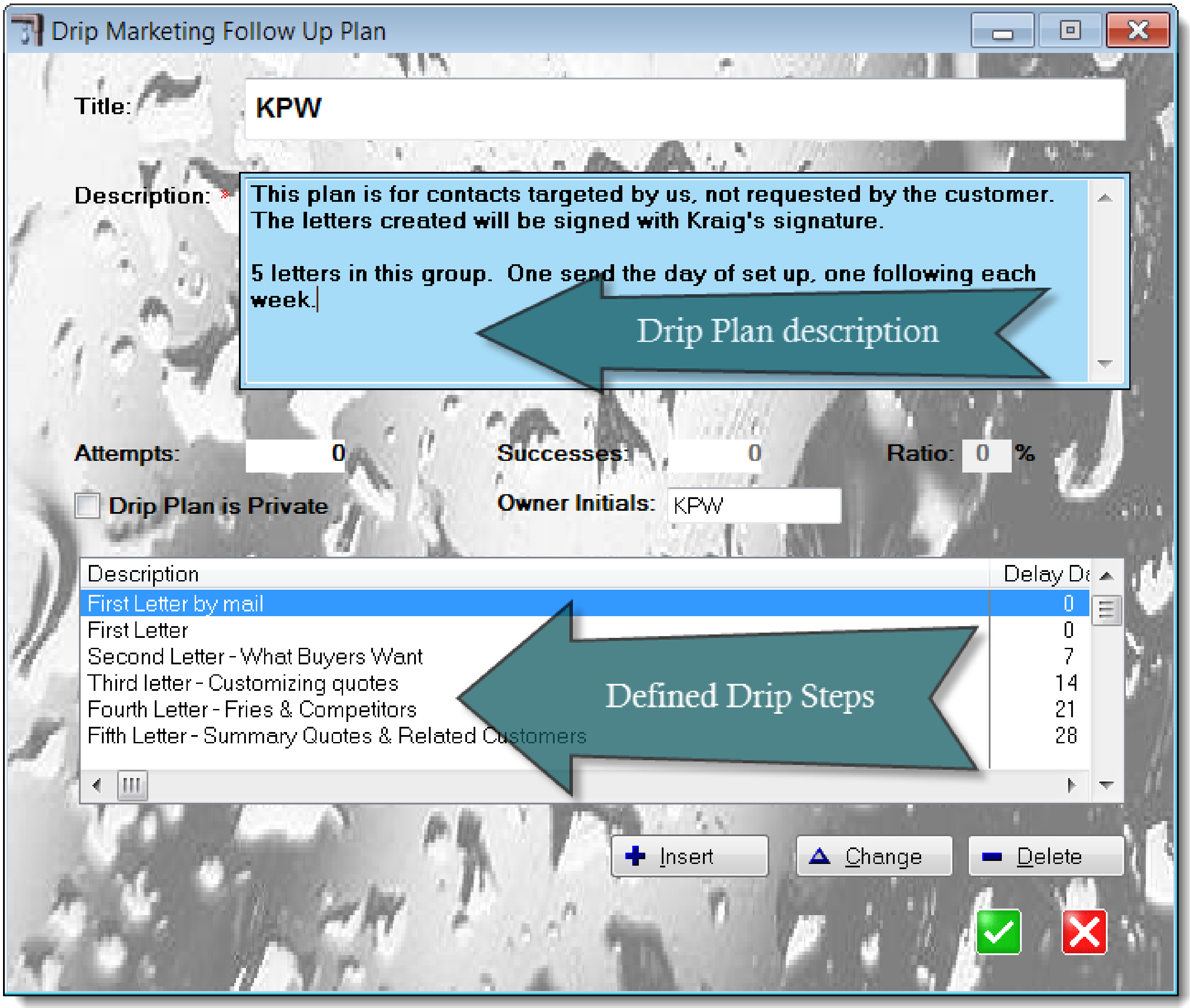
(DMP's *can* be specified as private. In which case they will not appear in your list unless you were the creator (or super-user), of course.

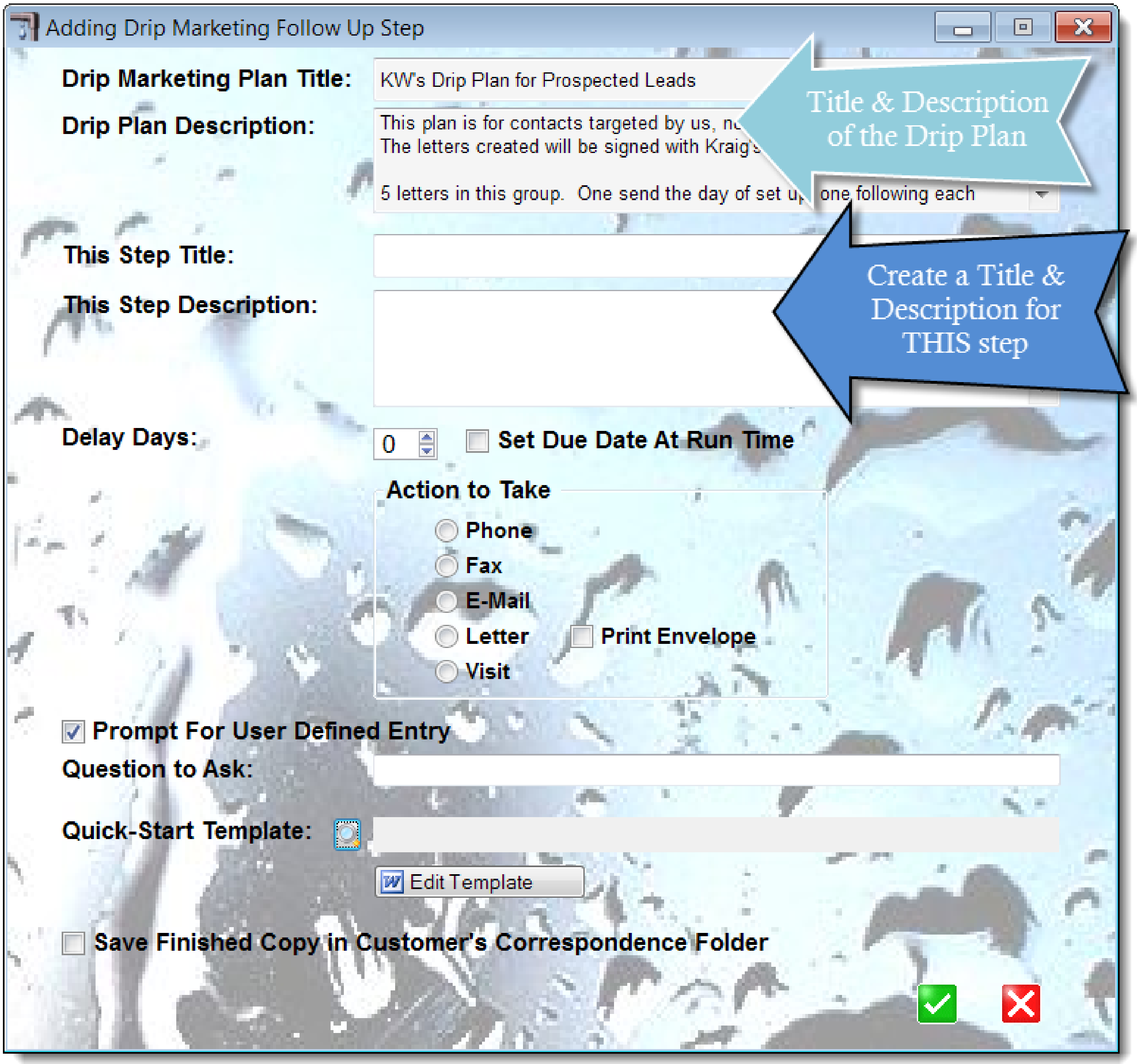
This is a typical Drip Plan form:



Give your Plan a title and create a short description to remind you what you intend to use it on.

The Drip Plan consists of a number of individual Drip Steps.





The Delay Days is the number of days from today that the step will be scheduled for. You may also choose Set Due Date at Run Time. In that case, MasterQ will prompt you for the desired date when the Drip Plan is applied.

The Action to Take should be set for Letter. (Other options will be supported later.) If you would like an envelope to print at the same time, check the Print Envelope box.

Check the box marked Prompt For User Defined Entry if you have a special field you wish to use. Type in the question you want MasterQ to ask.

Select the quick start template you created earlier.

Checking Save Finished Copy in Customer's Correspondence Folder and MasterQ will do that. There are certainly some drips that you will not need to keep a permanent copy of. However, if you don't do this

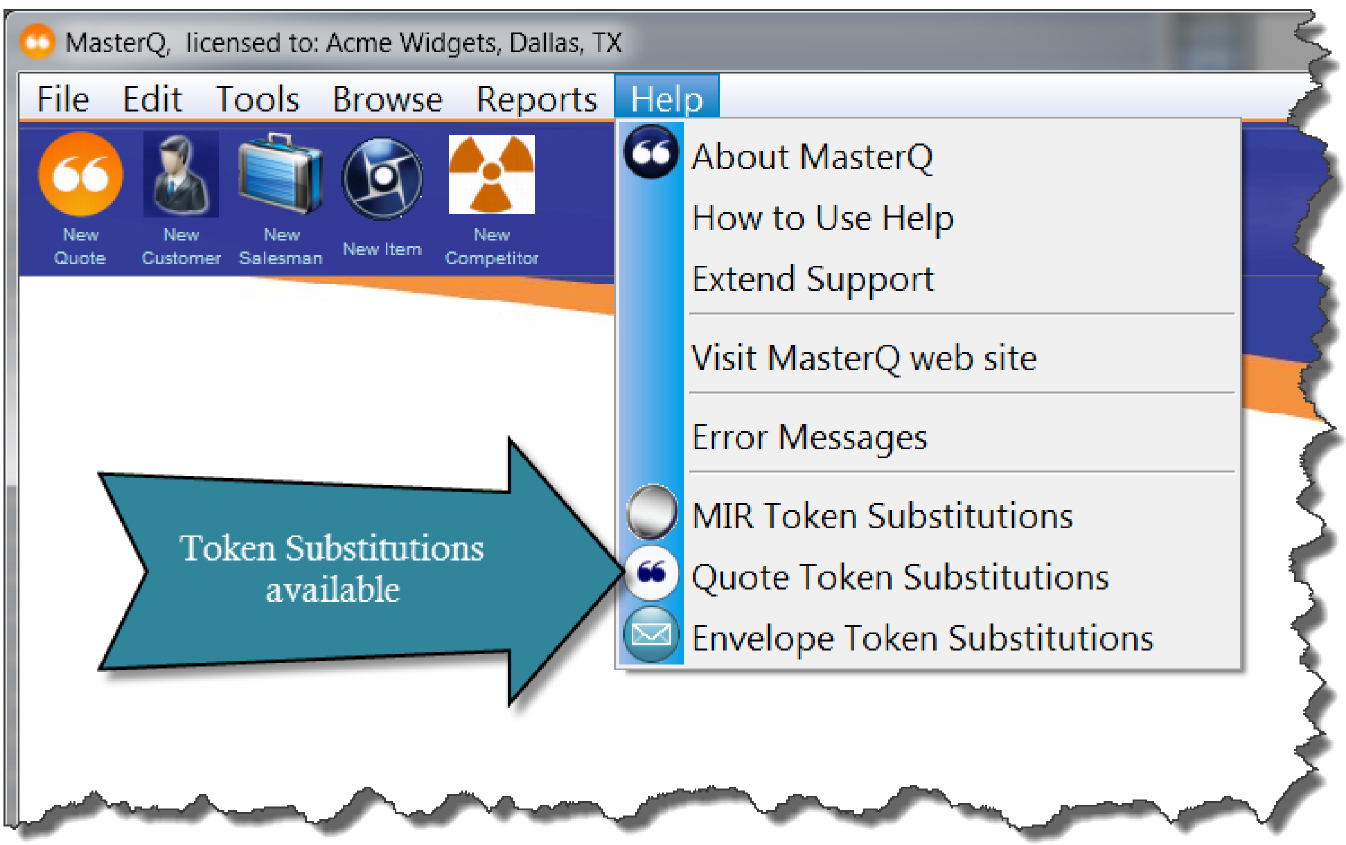
Microsoft Word will recognize that the document you are working with has changed and will offer to save it for you when you close Word. You don't want to save the modified drip document over the top of your quick start template. Use caution.

Quick Start Drip Templates

Much of the reporting flexibility you enjoy in MasterQ is possible because rather than hard-code reports into our software, we use Microsoft Word to create sales proposals, envelopes, and MIR documents. It is very easy to create of modify the exact document you need using your knowledge of Word. This also allows you to "tweak" the final report prior to printing, faxing or emailing. No other reporting system can give you this type of control.

Our programs use a skeleton document we call a quick-start template. These are standard Word documents contain all of your formatting information. They also may contain any number of special "words" (we will call them *tokens* to avoid confusion) that MasterQ will replace with appropriate values when the final document is created. These special tokens start with a dollar sign, such as $CustomerName.

The actual tokens that are available for you to use depend upon the type of document you are working with. You can view all of the available tokens using the HELP



MIR Token Substitutions

When creating MIR documents, the following tokens are available to you. All occurrences will be replaced when the document is created.

This token	Will be replaced by this
$QuoteDate	Date the quote was issued
$QuoteNumber	Quote number
$EffectiveDate	Effective date of quote
$Contact	Who the quote is addressed to (usually a first name / last name), could also be the contact Name for an RGA if the drip is associated with an RGA. If no quote or RGA is related to the drip, the name of the Person specified is used.
$TitleContact	Title Firstname Lastname, eg: Mr. Bob Smith
$ShippingDate	As shown on quote. Ie – “one week”
$ShipVia	Ship via from Quote, or if not specified in quote, from Customer record
$FOB	FOB from quote or if not specified, from customer record
$Terms	Terms from quote or if not specified, from customer record
$CreditLimit	Dollar amount of credit allowed
$DeliveryDay	Mon – Fri as shown in customer record
$SalesRepNumber	From customer record
$SalesPerson	Sales person or rep name from Salesman account associated with customer
$SalesRepAddress1	from Salesman record
$SalesRepAddress2	from Salesman record
$SalesRepCity	from Salesman record
$SalesRepState	from Salesman record
$SalesRepZip	from Salesman record
$SalesRepCSZ	formatted City-State-Zip from Salesman record specified in customer record

$SalesRepCountry	The name of the country the sales rep is located in. Country is already included in SalesRepCSZ if needed.
$SalesRepPhoneAC	The salesman telephone area code
$SalesRepPhone	The salesman telephone number
$SalesRepFaxAC	The salesman fax area code
$SalesRepFax	The salesman fax telephone number
$SalesRepEmail	The salesman email
$CustomerNumber	Customer Number
$CustomerName	Customer Name from customer record
$Address1	First address line from quote or if NA, from customer record
$Address2	Second address line from Quote or if NA, from customer record
$CityStateZip	Formatted City, State Zip Code from 1) Quote, or 2) RGA or 3) Person or 4) Customer
$City	from 1) quote document or 2) person or 3) customer record
$State	from 1) quote document or 2) person or 3) customer record
$Zip	from 1) quote document or 2) person or 3) customer record
$CompleteAddress	Formatted mailing address
$PhoneAC	Phone area code from 1) person or 2) customer record
$Phone	Phone number from 1) person or 2) customer record
$Ext	Extension from person record
$FaxAC	Fax area code from 1) person or 2) customer records
$Fax	Fax number from 1) person or 2) customer records
$CellAC	Cell area code from person record
$Cell	Cell number from person record
$email	Email address from person record
$DefaultBuyerName	from customer record

$DefaultBuyerEmail	from customer record
$LastPurchaseDate	Date of last purchase from customer record. Requires importing sales history
$LastQuote	Date of last quote from customer record
$today	Today's date in format MM/DD/YY
$LongToday	Today's date in format **mmmmmmmmm dd, yyyy**
$Time	Time the document was generated in format: **HH:MM XM**
$MilitaryTime	Time the document was generated in military time format: ie 23:30
$FirstName	First name of the People record associated with this drip
$LastName	Last name of the People record associated with this drip
$Salutation	Preferred way to address the person. Eg - what would follow DEAR __________ Examples might be "John" or "Ms. Smith" or "Dr. Jones". This is specified in the People record.
$Position	Person's title at company. eg- "Vice President of Engineering"
$CreatorName	The name of the user who initiated this drip as listed in the program user file
$CreatorInitials	The initials of the user who initiated this drip as contained in the program user file

MIR Template Tips

If keywords occur more than once in your document, *all* occurrences will be replaced with the new value.

Case does not matter. $Address1 and $aDdReSs1 will both be replaced by the first line of the person's address.

The replacement values will use the *style* of the keyword. If your quote template has the word **$Contact** (formatted as shown) the replacement value might be **Bob Jones**. If the keyword ***$CustomerNumber*** is formatted as shown, the replaced value might be ***A1001***.

You are not required to use any or all of the keywords in your quote. They are available to use if you wish.

Keywords may be placed anywhere in the document, including the header and footer.

Quote Token Substitutions

When creating quotes, the following tokens are available to you. All occurrences will be replaced when the document is created.

This keyword in your quote template	Will be replaced by this value
$Contact	Name of person the quote is addressed to
$QuoteDate	Date the quote was issued
$ShippingDate	The lead time shown on the quote
$ShipVia	The ship via instructions
$FOB	The FOB point shown on the quote
$Terms	The payment terms specified
$Salesperson	The name of the salesman
$QuoteNumber	A unique number identifying this quote
$CustomerNumber	Your unique number used to identify this customer
$CustomerName	The customer's company name
$TaxExcemption	The customer's tax ID number
$EffectiveDate	The date the quoted pricing takes effect
$FaxAreaCode	The customer's* fax number area code
$FaxNumber	The customer's* fax number
$AreaCode	The customer's* phone area code
$PhoneNumber	The customer's* phone number
$DeliveryDay	The day of the week you deliver to the customer
$CompanyName	The name of *your* company

Quote Template Tips

If keywords occur more than once in your document, *all* occurrences will be replaced with the new value.

Case does not matter. $QuoteDate and $quotedate will both be replaced by the date the quote was issued.

The replacement values will use the *style* of the keyword. If your quote template has the word **$Contact** (formatted as shown) the replacement value might be **Bob Jones**. If the keyword ***$CustomerNumber*** is formatted as shown, the replaced value might be ***A1001***.

You are not required to use any or all of the keywords in your quote. They are available to use if you wish.

Keywords may be placed anywhere in the document, including the header and footer.

Envelope Token Substitutions

When creating Envelope documents, the following tokens are available to you. All occurrences will be replaced when the document is created.

This token	Will be replaced by this
$Contact	Name of person the envelope is addressed to
$CustomerName	The person's company name
$Address	One or two lines containing the person's address
$CityStateZip	Returns a formatted line like: "Livonia, MI 48154"
$CompanyName	The name of *your* company

Envelope Template Tips

If keywords occur more than once in your quick-start template, *all* occurrences will be replaced with the new value.

Case does not matter. $CityStateZip and $citystateZIP will both be replaced by the formatted city, state zip code.

The replacement values will use the *style* of the keyword. If your envelope template has the word **$Contact** (formatted as shown) the replacement value might be **Bob Jones**. If the keyword ***$CustomerName*** is formatted as shown, the replaced value might be ***Able Machinery, Inc***.

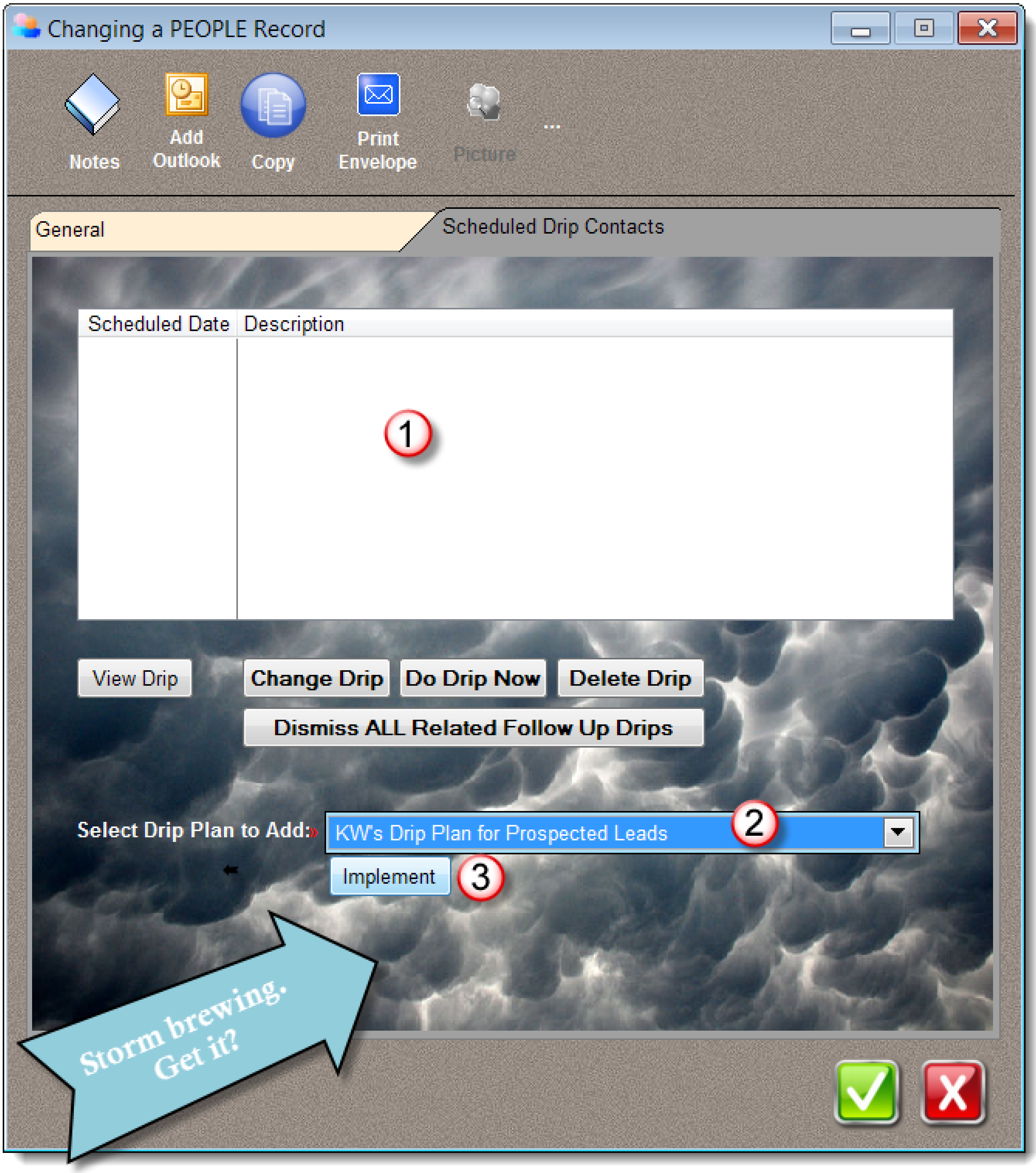
You are not required to use any or all of the keywords in your envelope. They are available to use if you wish.

Applying a Drip Plan

There are two ways to apply a Drip Plan from within MasterQ.

Applying a Drip Plan to a Person

Select the Scheduled Drip Contacts tab on the People form.



1 This area lists all of the currently scheduled drips for this person.

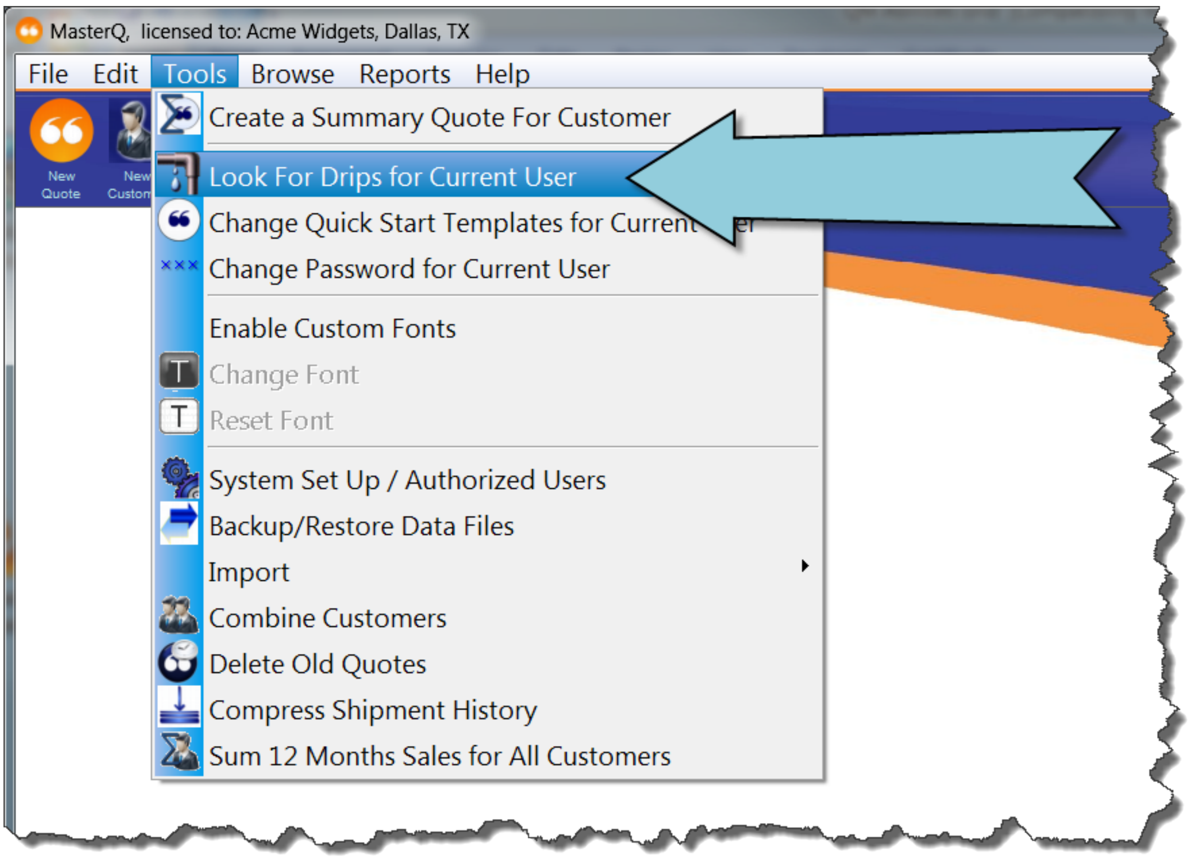
2 Select the drip plan you wish to apply using the drop down list.

3. Press the implement button. After implementing, the newly assigned drip steps will be displayed.

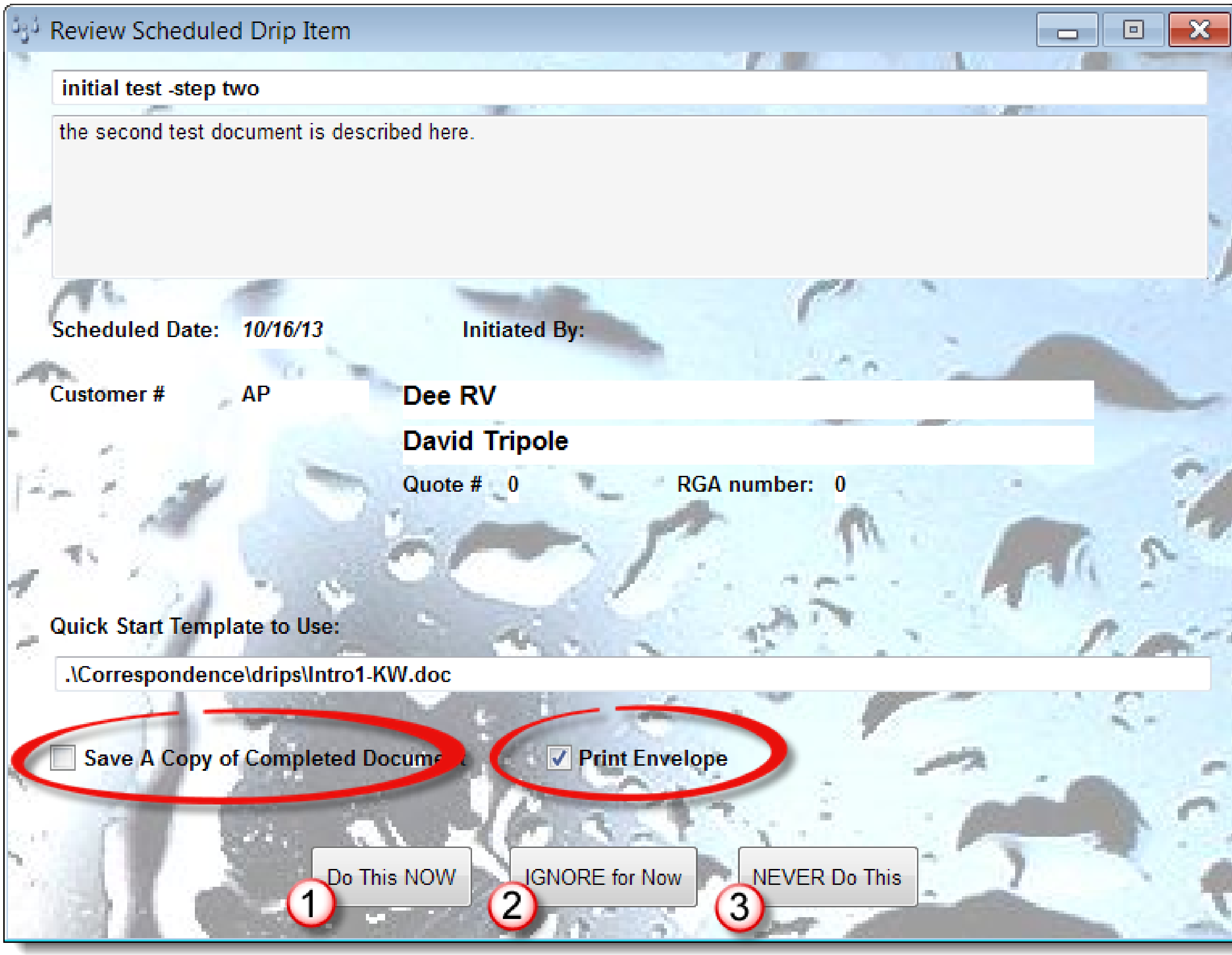
Checking the Drip Stream

Maybe this should be called wading in the drip stream. The second way to create the drip step is processing all scheduled drips at once.

So now you have some number of Drip Steps that have been applied to a particular person, scheduled to be implemented today or at some time in the future. All you need to do now is see what needs to be done today. MasterQ does this using the TOOLS | LOOK FOR DRIPS FOR CURRENT USER command from the main menu.



This causes MasterQ to evaluate each Drip Step in the stream. For each step that is scheduled on or before today's date, it will display a confirmation page like this:



The only changes you can make at this point would be to Save a Copy of the Completed Document or to modify the Print Envelope option.

You may then select one of the three displayed buttons:

1. Do This NOW - turns the scheduled drip step into a customized document inserting all of the appropriate information from the person's company, etc into the quick start template.

2. Ignore for Now - Does not create the document, but leaves it in the pending Drip Stream for next time.

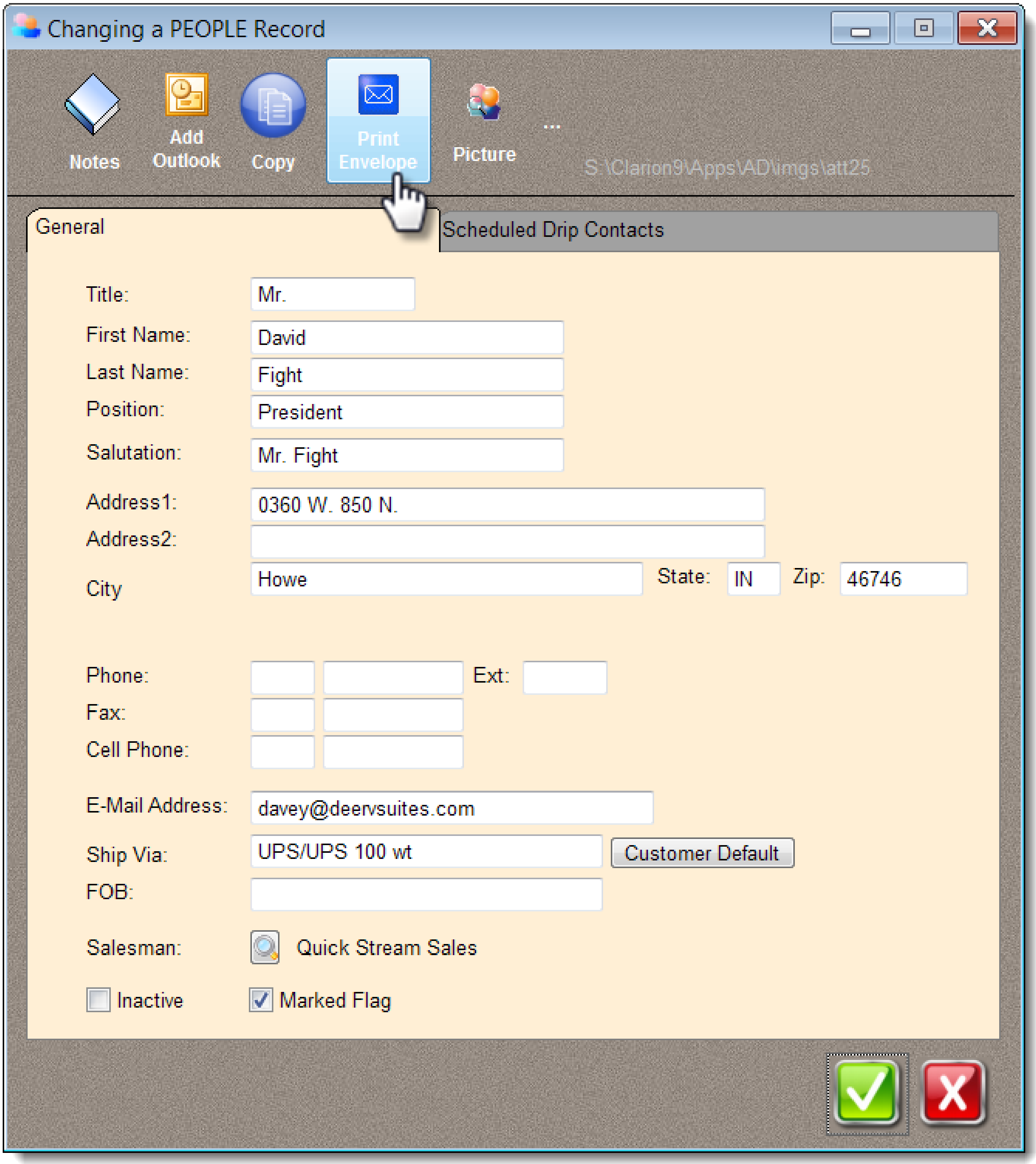
3. NEVER do this - deletes the item from the Drip Stream but does not create the document.

Printing Addressed Envelopes

MIR stands for "Make It Rain", a group of tools included in the MasterQ-ENT version that automates customer contact and follow up.

Have you ever wanted to send off a quick letter to some customer contact and found printing the envelope was more time consuming that writing the letter? Worry no more.

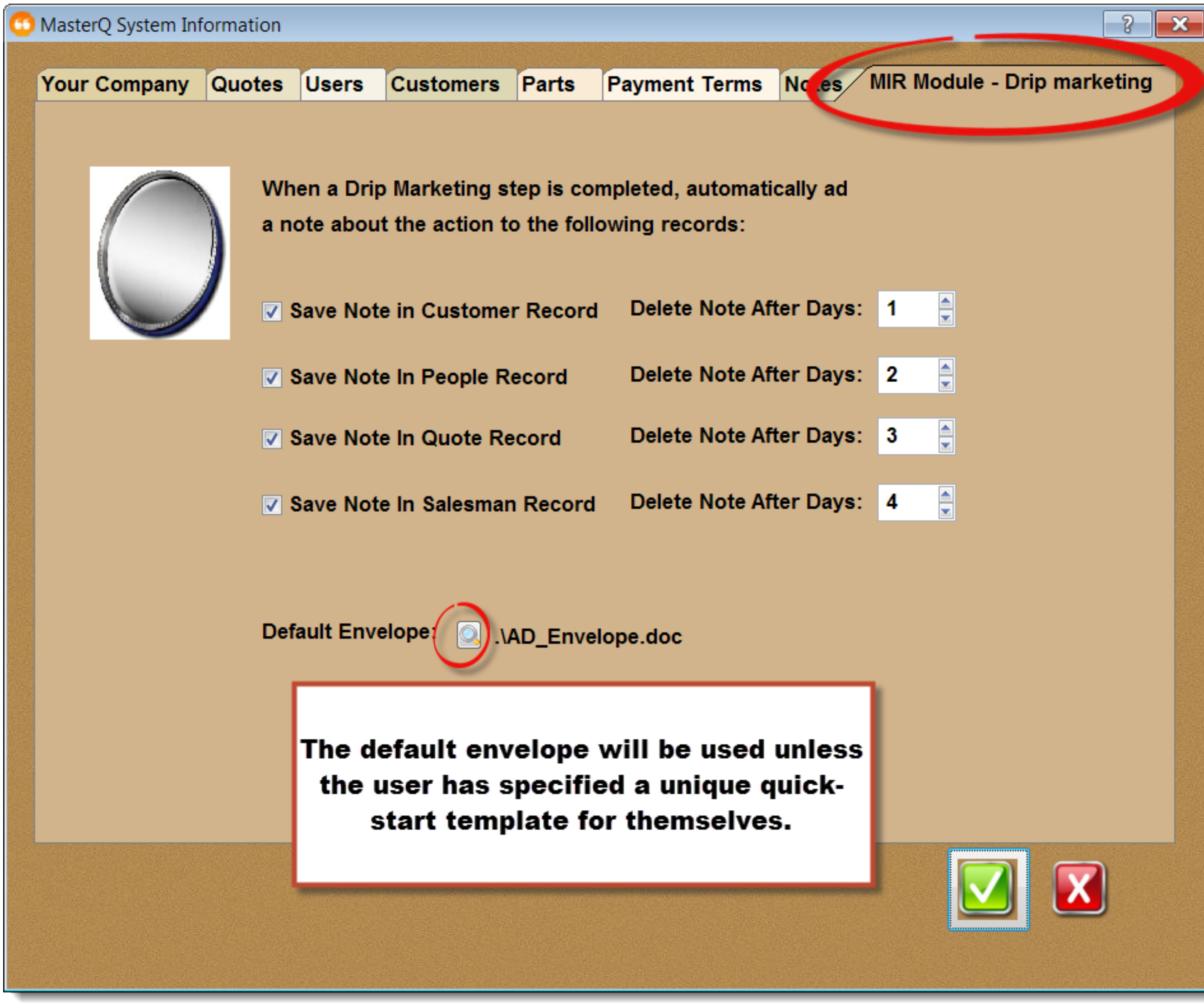
When you need to print an addressed envelope, go to the People record for the person you wish to mail to...


Changing a PEOPLE Record
Notes
Add Outlook
Copy
Print Envelope
Picture
...
S:\Clarion9\Apps\AD\imgs\att25
General
Scheduled Drip Contacts
Title: Mr.
First Name: David
Last Name: Fight
Position: President
Salutation: Mr. Fight
Address1: 0360 W. 850 N.
Address2:
City Howe
State: IN
Zip: 46746
Phone:
Ext:
Fax:
Cell Phone:
E-Mail Address: davey@deervsuites.com
Ship Via: UPS/UPS 100 wt
Customer Default
FOB:
Salesman: Quick Stream Sales
Inactive
Marked Flag

Specifying the Default Envelopes

This feature is part of Agenda Development's MIR module. MIR stands for "Make It Rain", a group of tools included in the MasterQ-ENT version that automates customer contact and follow up.

After setting up your envelope quick-start template, you need to tell MasterQ where this template is located. Use the TOOLS | SYSTEM SET UP command from the main menu and select the MIR Module tab.



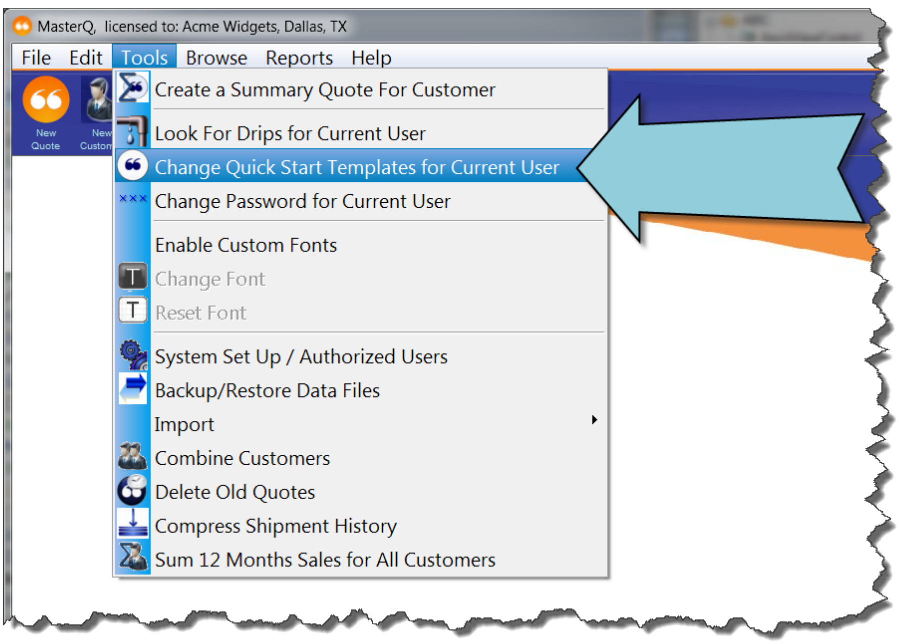
Choosing a unique envelope template for one user

Customizing the envelope template

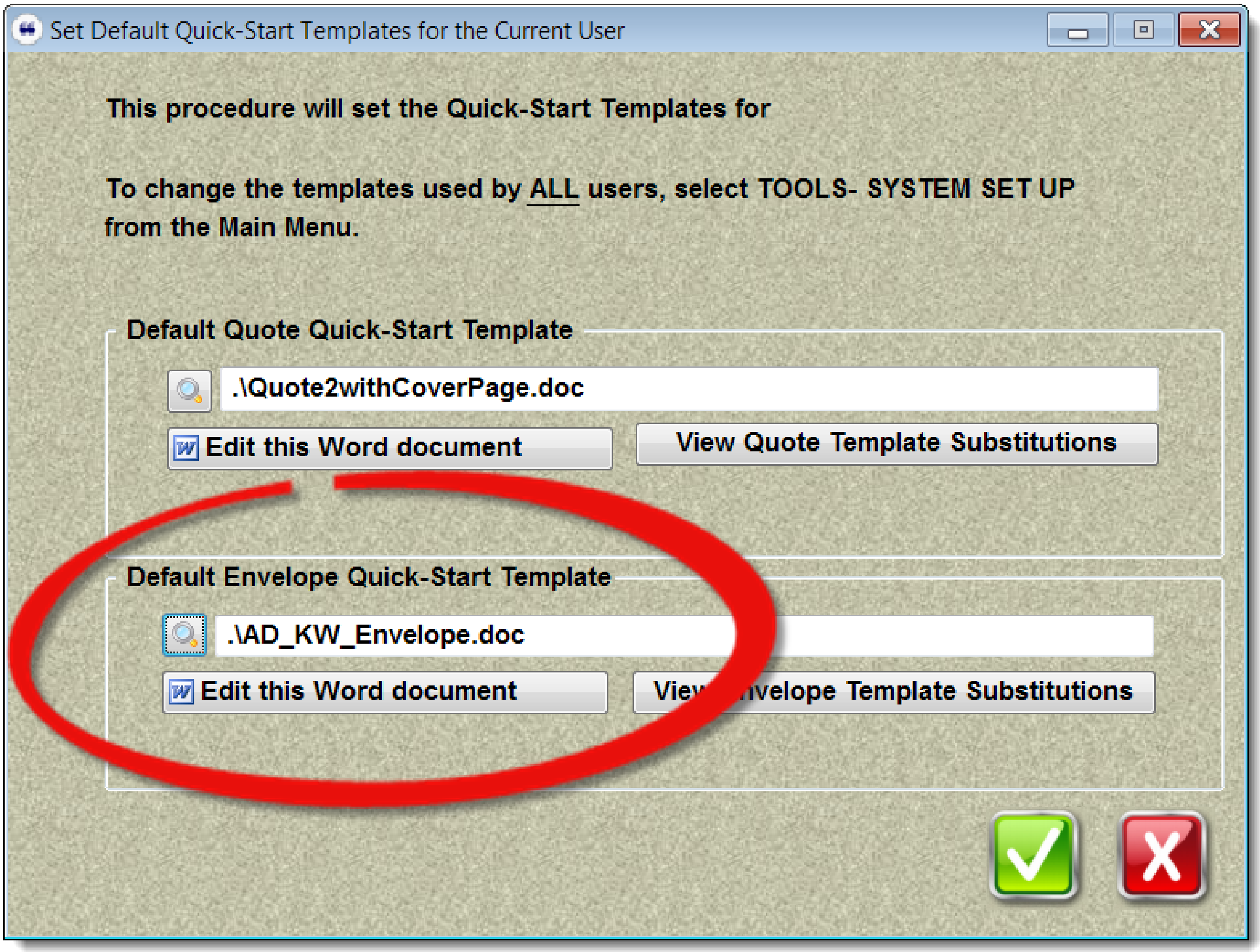
Choosing a Unique Envelope

This feature is part of Agenda Development's MIR module. MIR stands for "Make It Rain", a group of tools included in the MasterQ-ENT version that automates customer contact and follow up.

For many, one standard envelope is good enough. But for others (you know who you are), it needs to be just a bit better. For those folks, each user has the ability to specify their own quick-start envelope template. Select the **Tools | Change Quick Start Templates for Current User** from the main menu.



This same form is used to select a specific quick-start quote and envelope template for the current user. But for now, we're just interested in the Envelope template.



You may select the file by pressing the look up button. There are also buttons to allow you to edit this document and to view all of the available template substitutions available to use on your envelope.

If no entry is made here, the default envelope specified in the System record will be used.

This feature is part of Agenda Development's MIR module. MIR stands for "Make It Rain", a group of tools included in the MasterQ-ENT version that automates customer contact and follow up.

Envelope Quick-Start Template Substitutions

When envelopes are created, MasterQ will search through your quick-start template document and substitute values for the keywords listed below.

This keyword in your quote template	Will be replaced by this value
$Contact	Name of person the envelope is addressed to
$CustomerName	The person's company name
$CityStateZip	The person's "City, State (Optional Country) ZipCode"
$CompanyName	The name of *your* company
$Address	One or two lines of text with the person's address

Envelope Template Tips

If keywords occur more than once in your quick-start template, *all* occurrences will be replaced with the new value.

Case does not matter. $CityStateZip and $citystateZIP will both be replaced by the formatted city, state zip code.

The replacement values will use the *style* of the keyword. If your envelope template has the word $Contact (formatted as shown) the replacement value might be Bob Jones. If the keyword ***$CustomerName*** is formatted as shown, the replaced value might be ***Able Machinery, Inc***.

You are not required to use any or all of the keywords in your envelope. They are available to use if you wish.

Keywords may be placed anywhere in the document, including the header and footer.

Fries: Up-Selling System

The "Fries" feature is included in the MasterQ-PRO and MasterQ-ENT versions of the program.

Never Miss an Opportunity for Additional Sales

Fast food restaurants glibly ask "do you want to Super-Size that meal"? Buy any piece of electronics equipment and the check out person asks if you would "like an extended warranty for only a few dollars more?" Without a doubt, it works or it wouldn't be so common place. Have you ever considered if you could implement a similar program with your products?

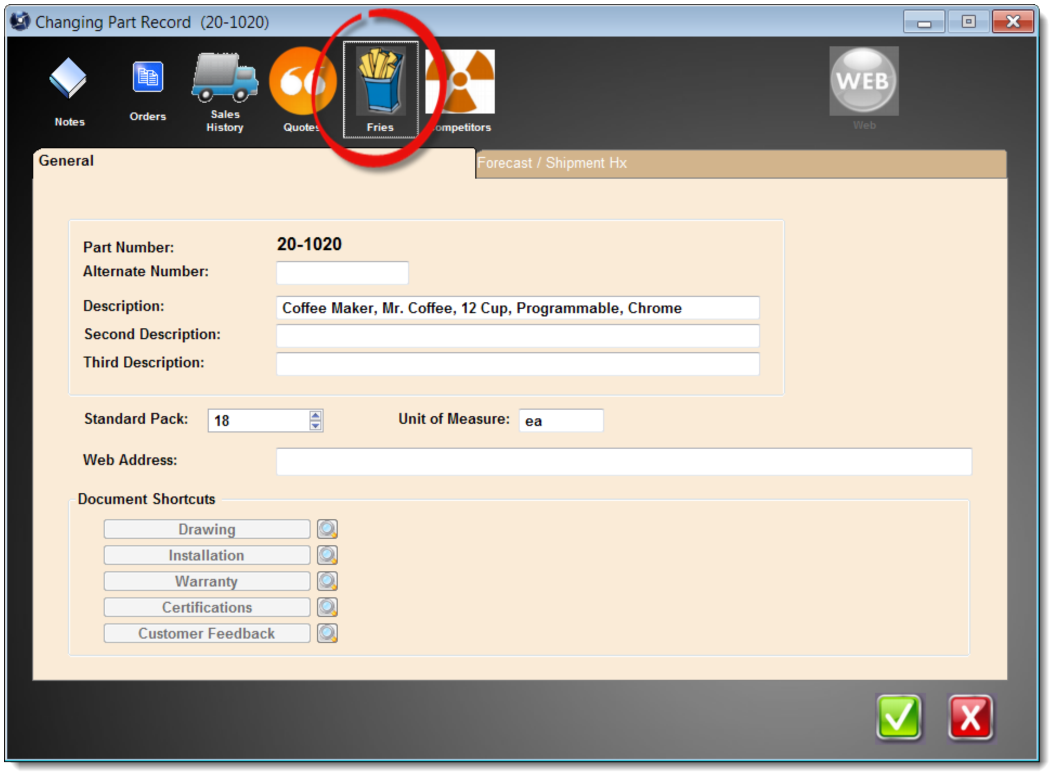
Perhaps you do already. But to take full advantage of it, your team should be prompted to offer the upsell when it is available. That's what the fast food industry does. That's what the large electronics stores do, too. Learn from the best!

The Fries feature lets you identify related products to be offered to your customers when a quote is being created. If you wish, the suggested fries can pop up automatically when ever a related item is quoted.

Setting Up Related Items

You can view and edit the "fries" associated with an item from the Part record.

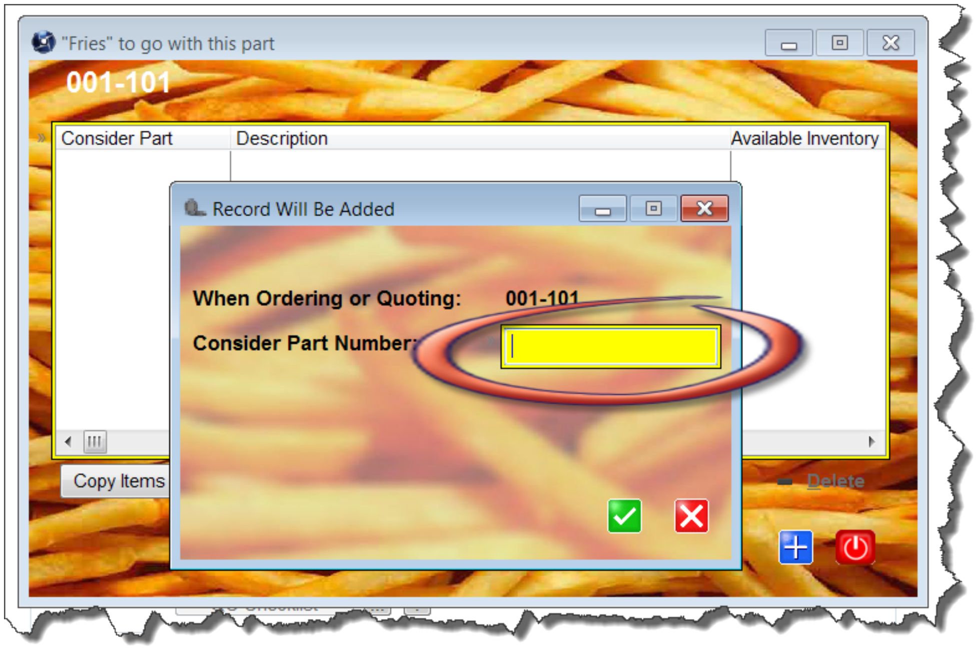
View the list of "fries" for a part by clicking the fries button at the top of the part record window.



After pressing the fries button, you will see the list of related items you have previously linked to the current item.

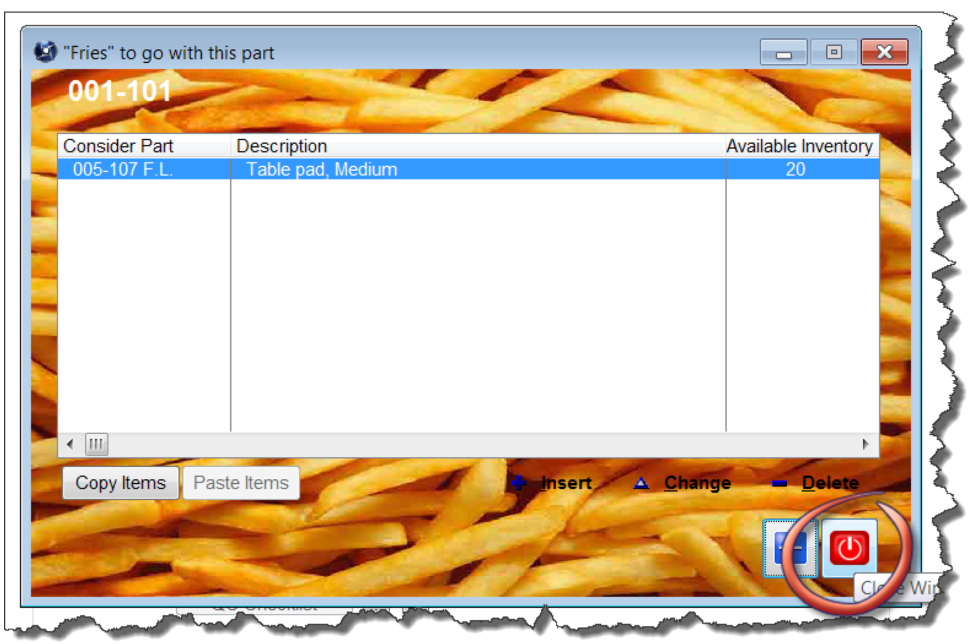
Press the insert button to add a new "fry".

Enter the related item number and press the accept button.



TIP: Your user record must have the proper permissions to add, change or delete fries. You must be designated as a super user, a MasterQ manager, sales manager or parts manager.

Repeat as required to add all options a customer might consider. When finished, press the close button.



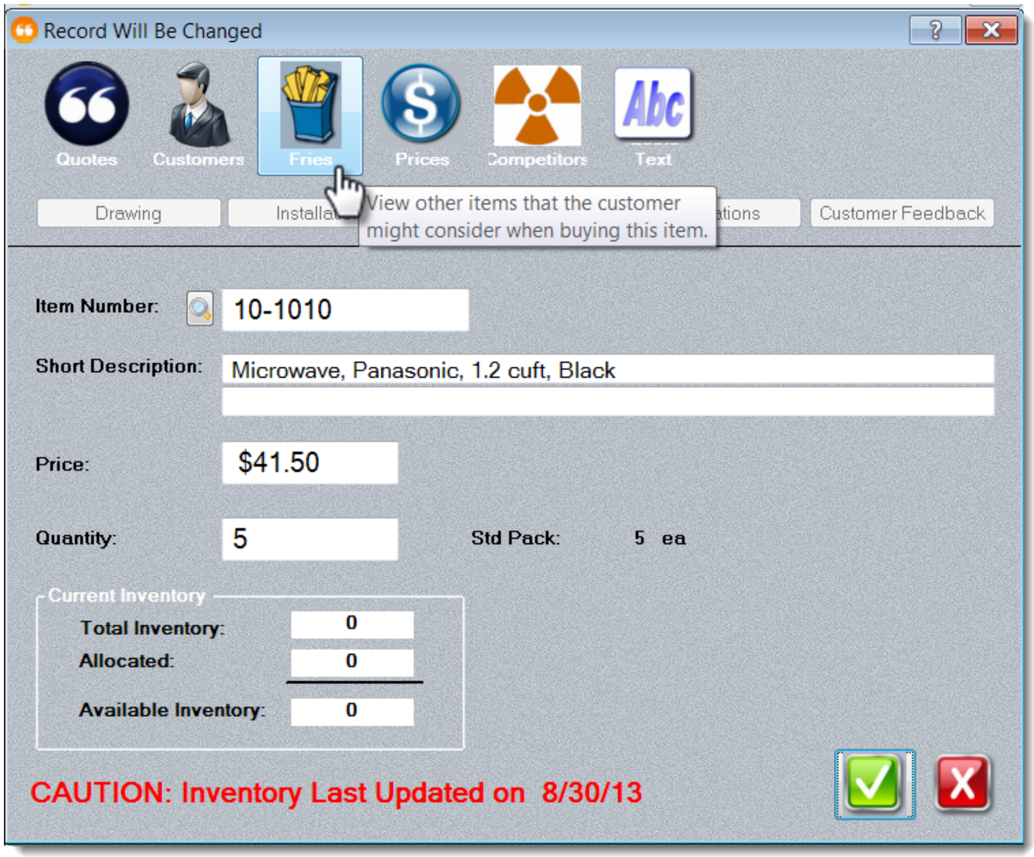
TIP: If you have multiple similar parts that will all use the same fries, create the list for the first part, then press the Copy Items button in the lower left corner. For other parts, simply repeat the fries list by pressing the Paste Items button.

Next: Being Reminded to Offer "Fries"

Being Reminded to Offer "Fries"

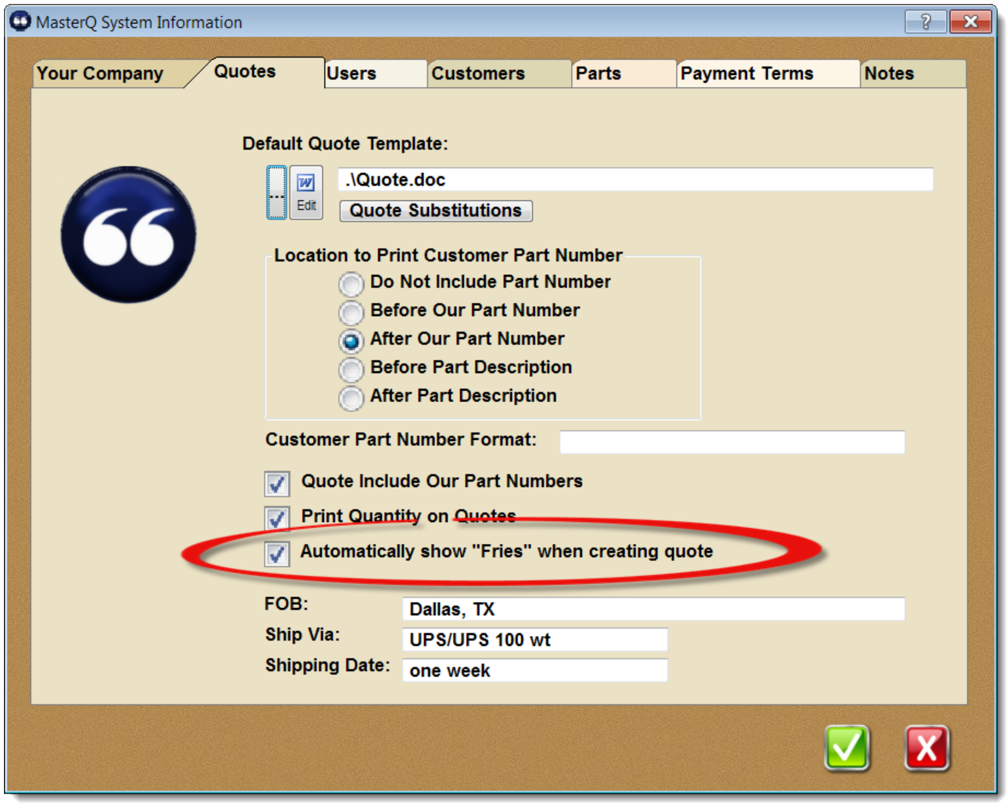
Once you have set up your "fries", there are two ways to be reminded to ask for the order.

When entering the item on your quote, you may press the Fries button to see the list of related items.



A more consistent way to be reminded to ask for fries is to check the [Automatically Show "Fries" when creating quote] option in the system record.

With this option checked, the list of available fries will automatically be displayed when creating a quote.



Next: [Adding Fries to the Quote]

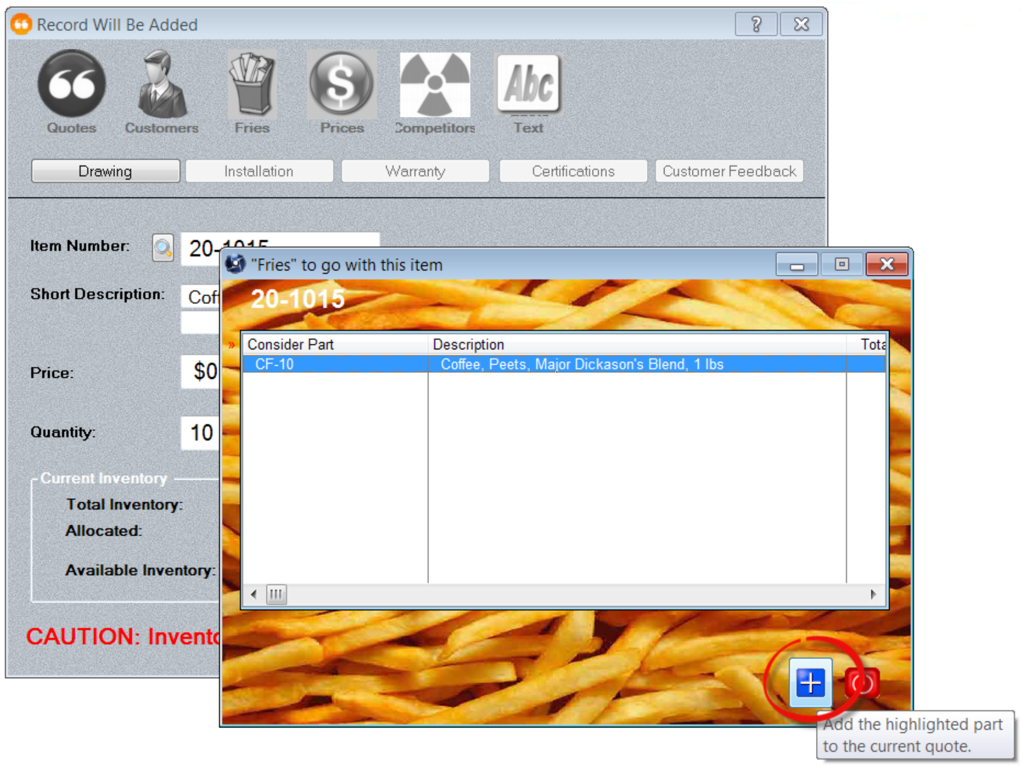
Adding Fries to the Quote

When the Fries button is pressed, or when the item is added to the quote (if you have enabled the automatic display of fries), a window is displayed *if* fries have been associated with the quoted item.

To add the "fry" to the quote, just press the Add button.

If there are more than one Fries listed, you can add as many as you wish.

When you have completed the quote entry for the original item, each "fry" you have selected will be presented to you.



You may also identify additional items as fries, or modify the list by pressing the Insert, Change or Delete buttons on this form.

Pressing the close button will close the window and present you with the fries for pricing.

Custom Fonts

Customer Fonts are a feature included in the MasterQ-ENT version.

You can use Custom Fonts to change the appearance of the MasterQ program.

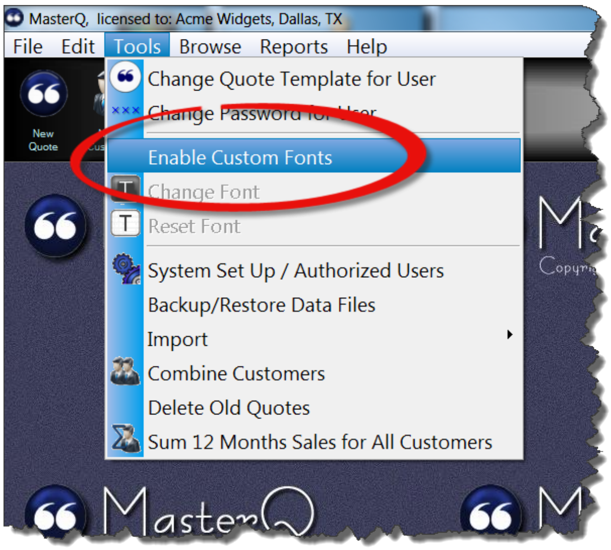
We have designed the size of the various windows and selected appropriate type sizes to meet the needs of most users. But if you have a smaller screen or are just "that" sort of person, you can tweak the program as you see fit.

Any changes you make to the fonts are applied only to *your* version of the program. Other users are not affected by your choices. But the fonts and colors you select will be applied to the program from any computer you sign in on.

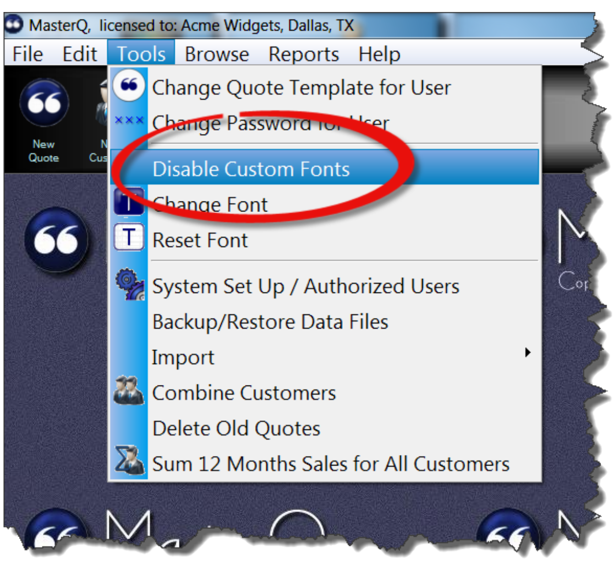
When you use Custom Fonts, each window is re-drawn using the fonts you have selected. This may result in a slight delay or screen flicker when opening windows. This will be more noticeable on slower computers. If this delay is a problem, simply disable custom fonts.

Enabling & Disabling Custom Fonts

If Custom Fonts are currently disabled, the tools menu will look like the picture below. The **Enable Custom Fonts** menu choice is available and the **Change Font** and **Reset Font** choices are disabled.



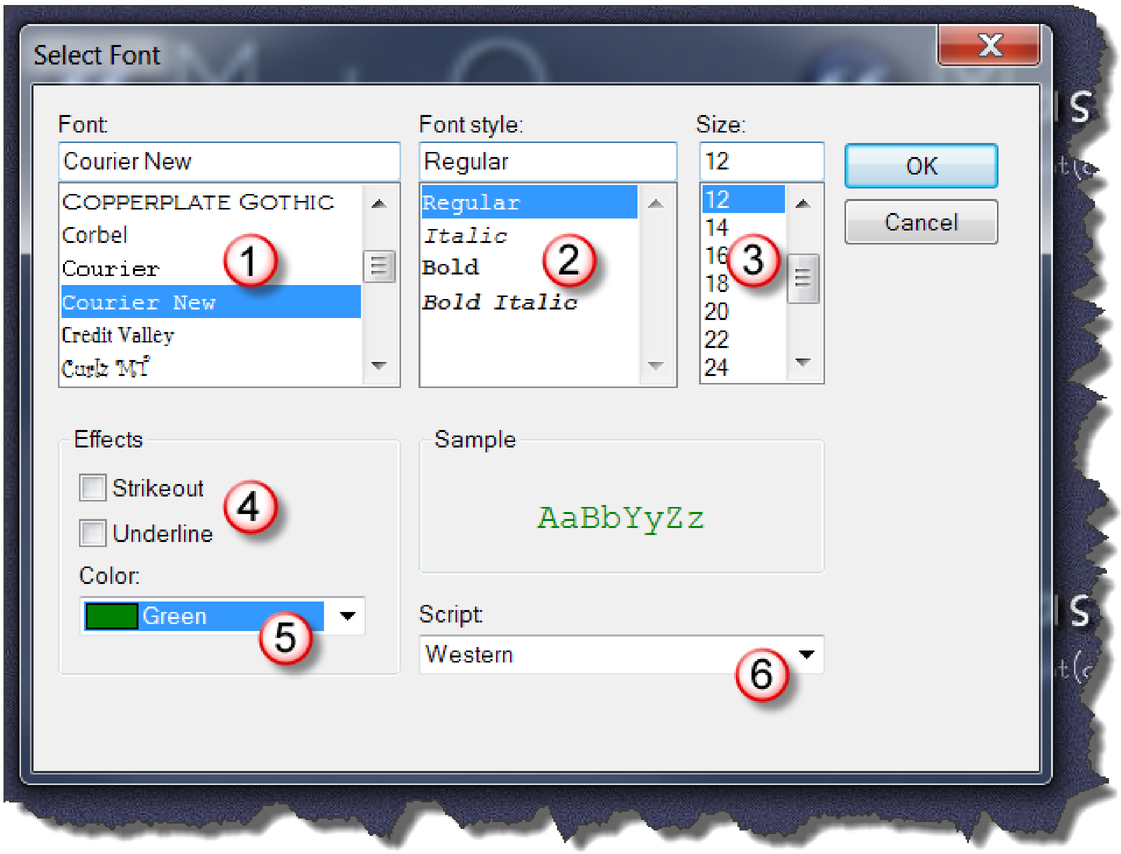
After clicking on the **Enable Custom Fonts** menu command, the menu is changed as below. Note that the Change Font and Reset Font commands are now enabled.



Next: [Changing Fonts](#)

Changing Fonts

You can use Custom Fonts to change the appearance of the MasterQ program.



1 Select a font from the displayed list of fonts installed on your computer. NOTE: Your installed fonts may be different than the list shown above.

2 Select the font style. The styles offered may vary depending upon the font you have selected.

3 Select a size. Larger fonts result in bigger windows that may not fit your screen.

4 I can't imagine anyone using either of these effects. But, it's your screen. Who am I to criticize?

5 Select the color you wish to use.

6 Script? Really? You can try it, but I bet you don't use it.

After you have selected your custom font, most windows you open will use this type style.

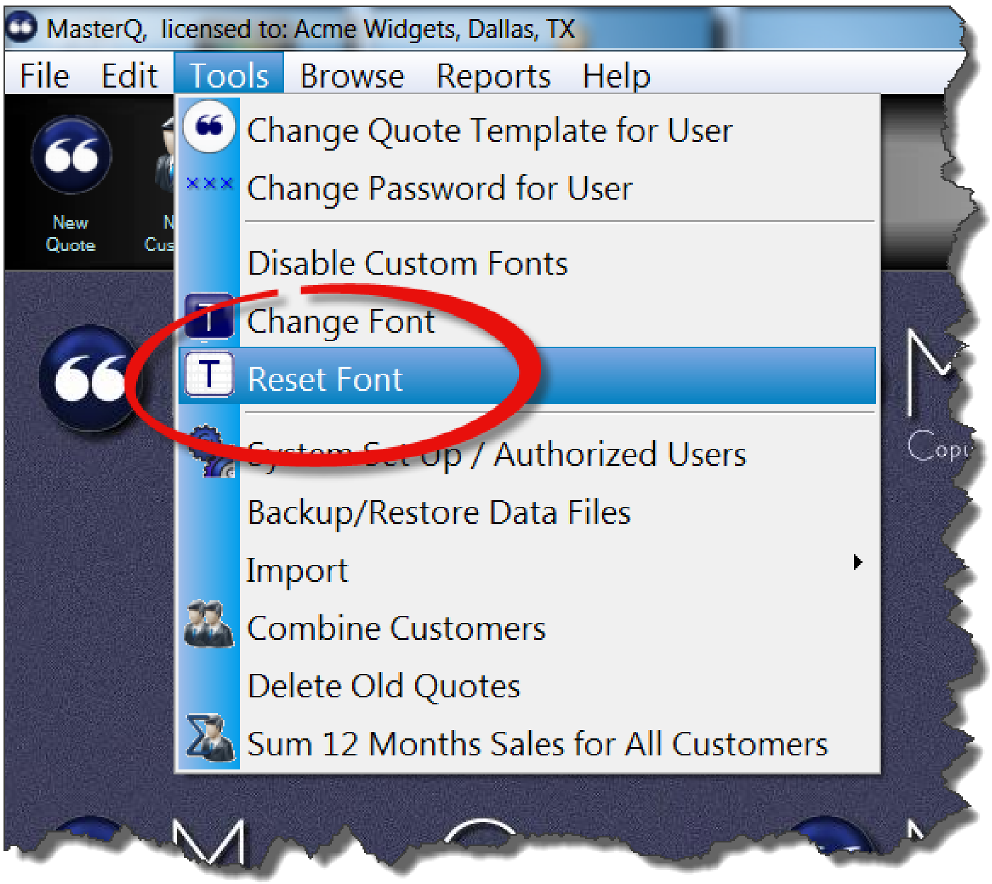
Note: Windows that are already open are unchanged.

Next: Resetting Fonts

Resetting Fonts

So you've experimented with the most bizarre fonts on your computer, in hideous colors and styles. You thought it would be cute, but now you're developing a terrible headache.

It's ok. We've all been there. That's why we included a Reset Font command on the main menu.



You can also use the Disable Custom Fonts to return the screen to normal.

Next: [Browsing Tips]

12 Months Sales Dollars

To use this feature you must, of course, also [import your sales history] periodically.

Once you have imported the sales history, MasterQ-PRO can show you each customer's total sales for the previous 12 months. You could, for example, sort your customer list in ascending or descending order or you can [filter] customers in the list. Another example: you could filter for customers with sales of more than $10,000 who have not ordered in the past 60 days and easily [export] this list to Excel.

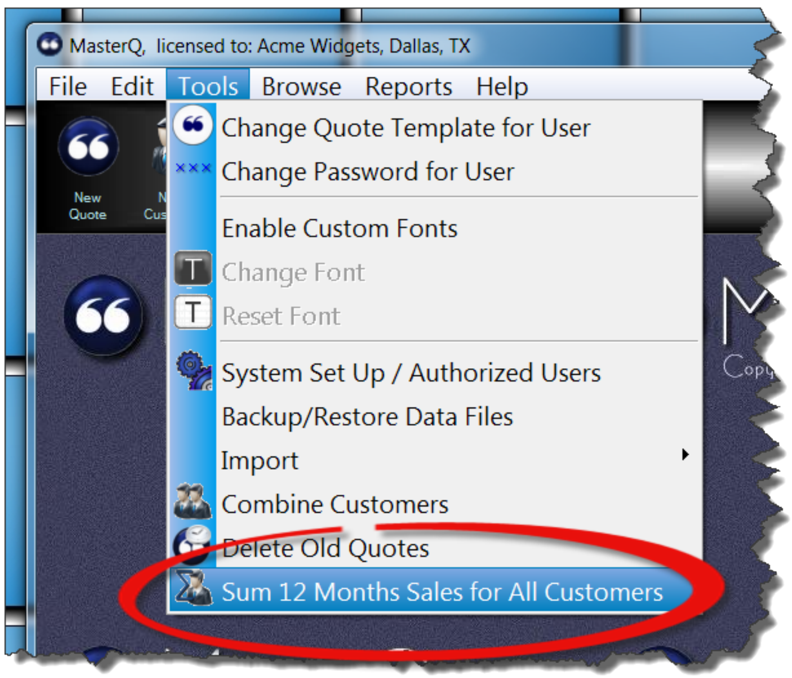
MasterQ can calculate these historical sales in two ways. Each has it's advantages and drawbacks.

Sum 12 Months Sales for All Customers - a simple command from the main menu sums sales for all customers at one time. Depending on the number of customers and how many sales each has, this command can take a short amount of time to complete. However, when completed, all customers have their sales summary up to date. This is beneficial when you wish to sort customers by sales dollars. The downside is that the number is *only* recalculated when you issue the command, but all customers have up to date sales history values.

Recalculate 12 Month Sales When Opening Customer Record - This option is set in the System Set Up procedure in the main menu. When this option is enabled, every time you open a customer record their 12 month sales number is totaled. You do not have to *do* anything; the number is always up to date. The downside to this method is that *only* recently viewed customers will have up to date values. Also, MasterQ will see this as a change when you view the customer record and if you attempt to close the customer window without using the OK button, you will see a message asking if you want to save your "changes". However, there will be a slight hesitation when each customer record is opened as MasterQ processes the customer's orders. The amount of delay depends on the number of sales records, the speed of your computer and your network. Usually, this slight hesitation is not an issue with users.

Can you do both? Yes, certainly. Having the Recalculate on Opening Record option enabled gives you up to date 12 month sales and you can still issue the Sum 12 Month command when you need to sort customers based on sales dollars.

Sum 12 Months Sales for All Customers - a simple command from the main menu totals the sales for each customer.



Depending on the number of customers and how many sales each has, this command can take a short amount of time to complete. However, when completed, *all* customers have their sales summary up to date. The downside is that the number is *only* recalculated when you issue the command.

You may also choose to Recalculate 12 Month Sales When Opening Customer Record - This option is set in the System Set Up procedure in the main menu. When this option is enabled, every time you open a customer record their 12 month sales number is totaled. You do not have to *do* anything; the number is always up to date. The downside to this method is that *only* recently viewed customers will have accurate, up to date values. Also, MasterQ will see this as a change when you view the customer record and if you attempt to close the customer window without using the OK button, you will see a message asking if you want to save your "changes". However, there will be a slight hesitation when the customer record is opened as MasterQ processes the customer's orders.

Can you do both? Yes, certainly. Having the Recalculate on Opening Record option enabled gives you up to date 12 month sales and you can still issue the Sum 12 Month command if you need to compare customers.

Exporting Information From MasterQ

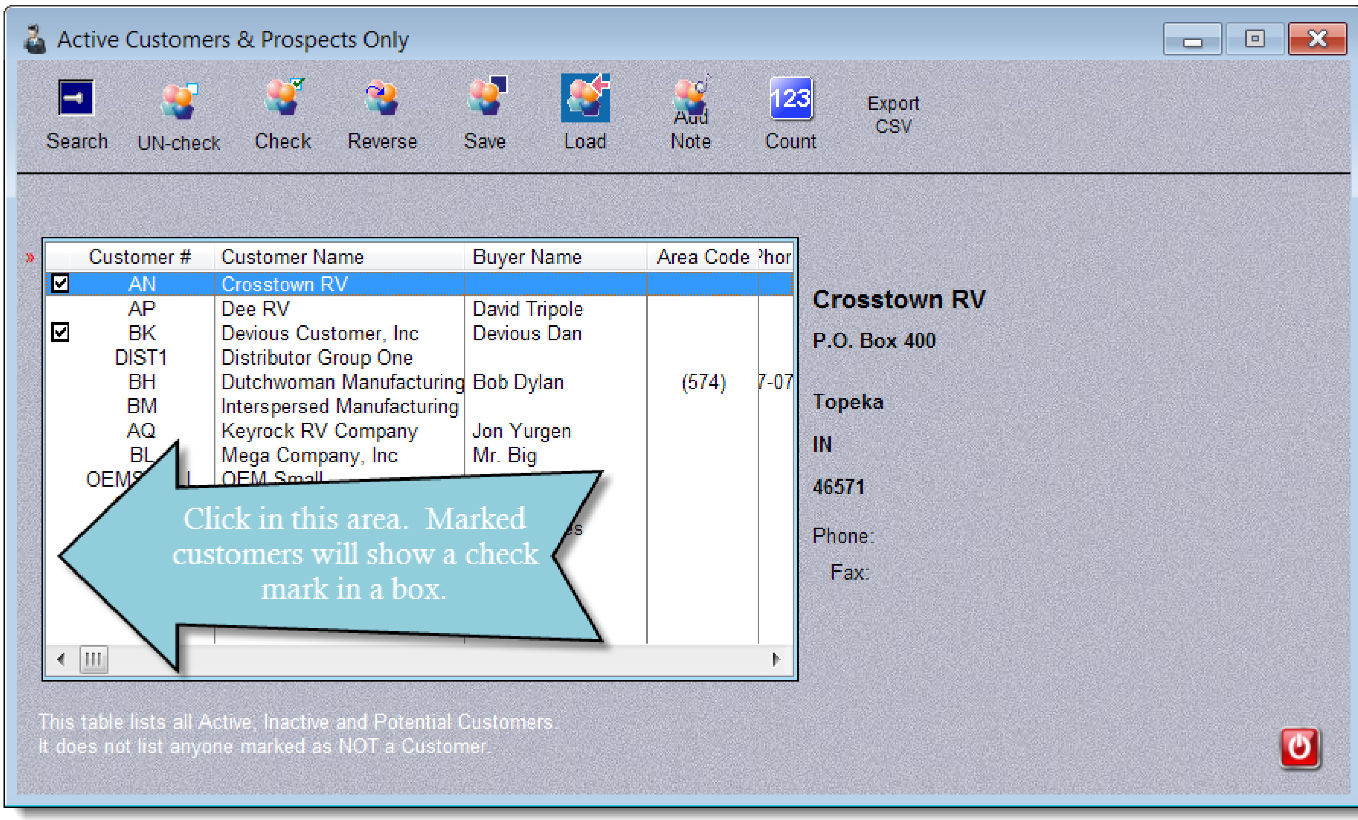
All versions of MasterQ include a powerful, easy to use tool to export any displayed browses directly into Microsoft Excel.

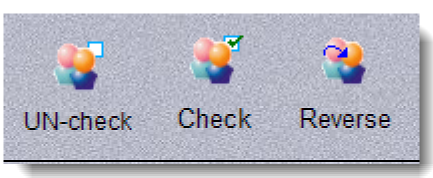
MasterQ-ENT adds features that lets you tag individual customers or people using a variety of techniques and to export them into CSV files.

Exporting Customer Data

This feature allows you to select a group of customers and export them to a CSV file for use by other programs. This feature is available in MasterQ-ENT.

The first step is to identify *which* customers you wish to export. This is referred to as "marking" a customer. The most direct way to mark a customer is to click in the customer browse in the far left column by the desired customer's name.!





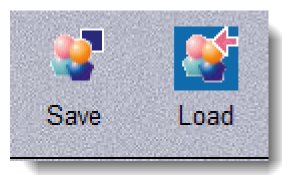
You may un-mark all displayed customers, mark all displayed customers, or swap their marked status using the UN-Check, Check & Reverse buttons. These actions apply only to customers currently displayed. You can filter the customers currently displayed by using the Search button.

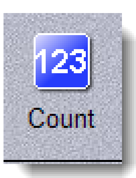
An example of how you might apply this feature: If you needed an export file of all customers in the state of Indiana, but not the ones in Indianapolis...

1) Press the UN-check button to clear all marks.
2) Use the Search button to limit the display to customers with the state = IN
3) Press the Check button.

4) Use the Search button to limit customers where the city = Indianapolis. (All of these customers will show marked, since they were a part of step 2.)
5) Press the UN-check button. Remember, this process only applies to the displayed customers - the ones in Indianapolis.
6) Press the Export button.

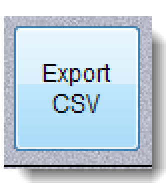
The save and load buttons "remember" your current list of marked customers. When they are *loaded*, you are given the option of marking, unmarking, or flipping the current status of the customers being loaded.





The count button gives a quick count of the number of customers you have currently marked and the total number of customers in your database.

Pressing the Add Note button will create a note that will be applied to all currently marked customers.
More information about Adding Notes to multiple customers at one time is available here.



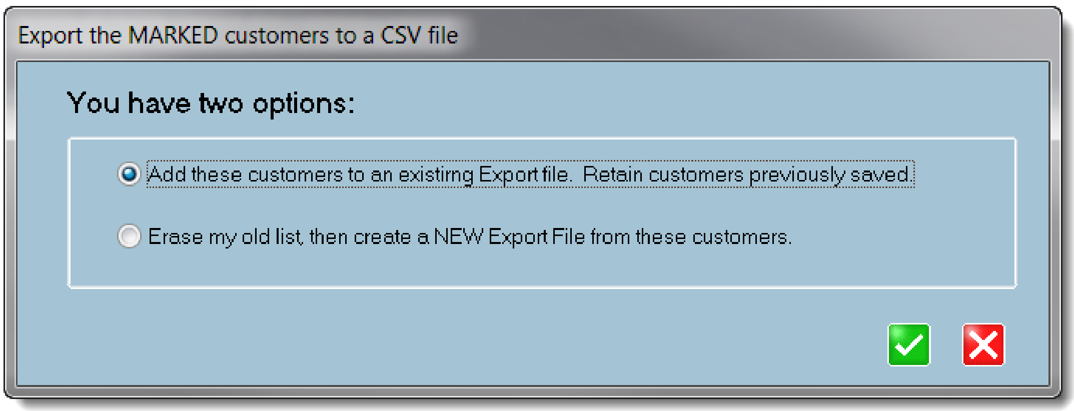
The Export CSV button saves the currently marked customers in a CSV (comma separated values) file of your choosing. This can be useful for creating mail merge applications.

The following information is exported:

- Company Name

- Address (line 1)
- Address (line 2)
- City
- State
- Zip Code
- Area Code
- Phone number

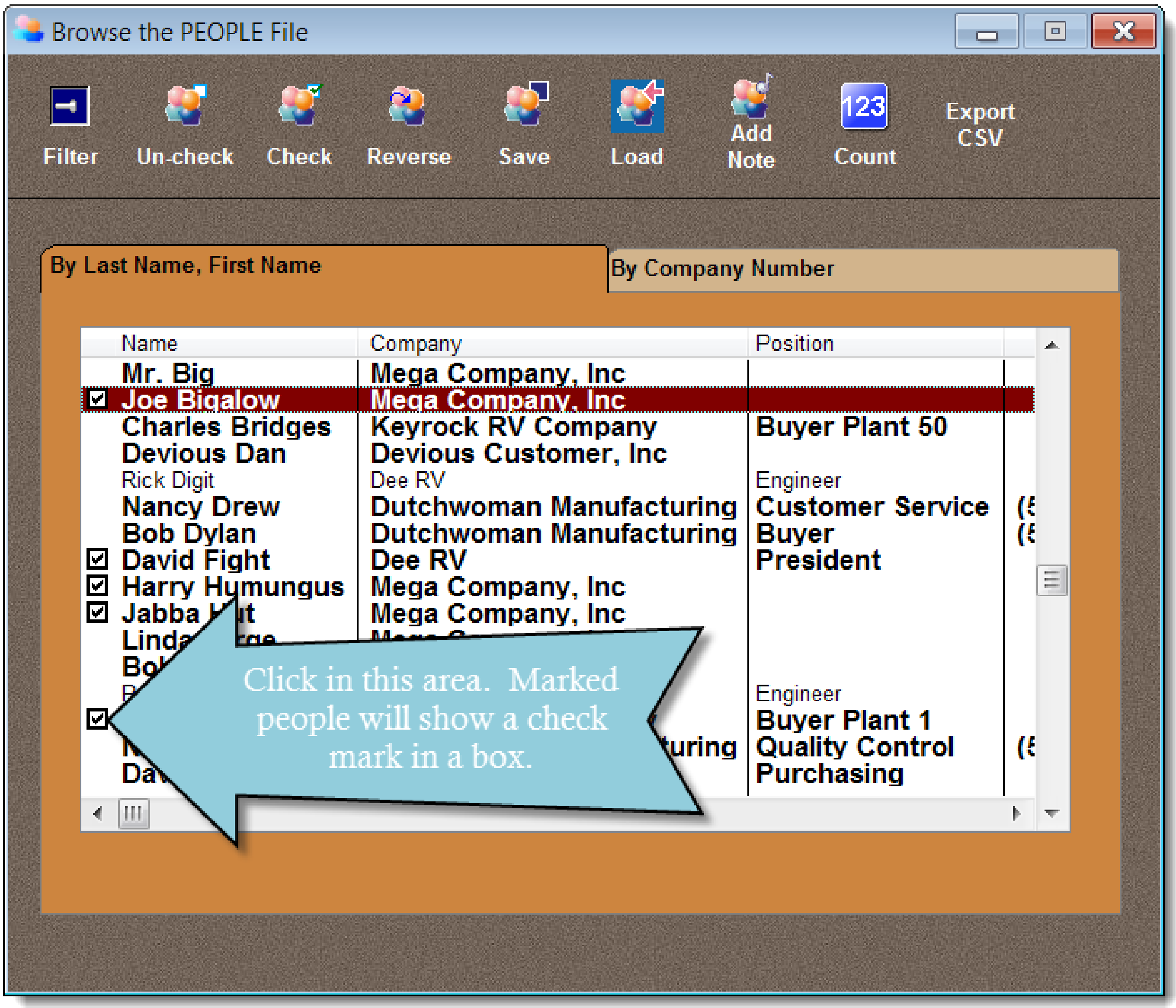
You have the option of adding the marked names to the current file or replacing the current file with these marked names.

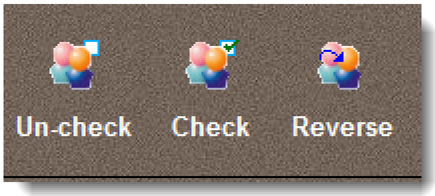


Exporting People Data

This feature allows you to select a group of people and export their information into a CSV file for use in other programs. This feature is available in MasterQ-ENT.

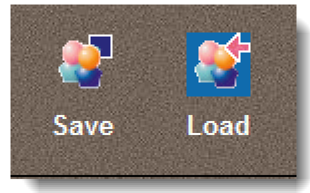
The first step is to identify *which* contacts you wish to add a note to. This is referred to as "marking" a contact. The most direct way to mark a contact is to click in the people browse in the far left column by the desired person's name.



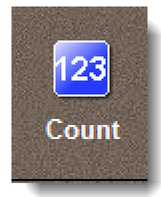


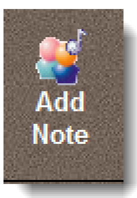
You may un-mark all displayed people, mark all displayed people, or swap their marked status using the UN-Check, Check & Reverse buttons. These actions apply only to people currently displayed. You can filter the people currently displayed by using the Search button.

The save and load buttons "remember" your current list of marked customers. When they are *loaded*, you are given the option of marking, unmarking, or flipping the current status of the customers being loaded.



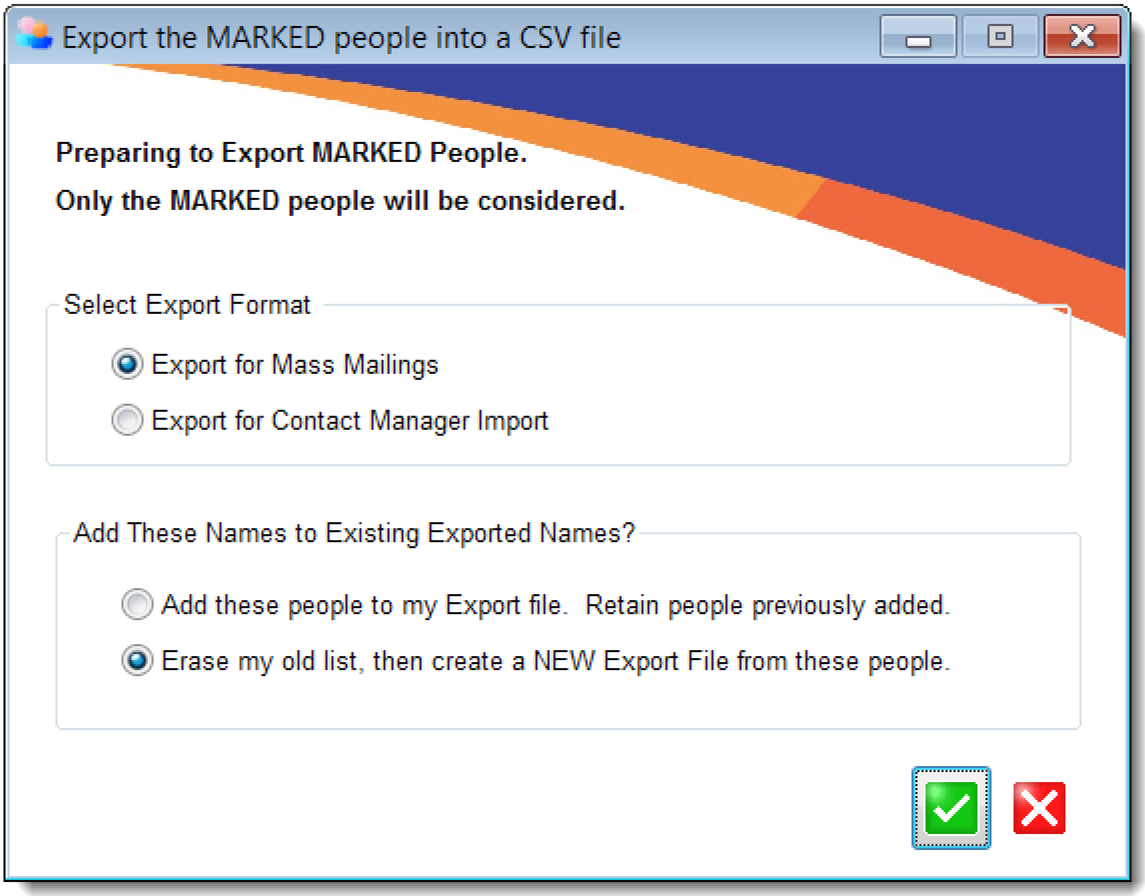
The count button gives a quick count of the number of people you have currently marked and the total number of people in your database.





Pressing the Add Note button will create a note that will be applied to all currently marked people.
More information about Adding Notes to multiple people at one time is available here.

The Export CSV button saves the currently marked people in a CSV (comma separated values). This can be useful for creating mail merge applications.



Choosing Select Export Format of Export for Mass Mailings will create a CSV file containing the following information:

- WholeName
- CompanyName
- Address1
- Address2
- City
- State
- Zipcode

If you select Export for Contact Manager Import instead, additional information is included:

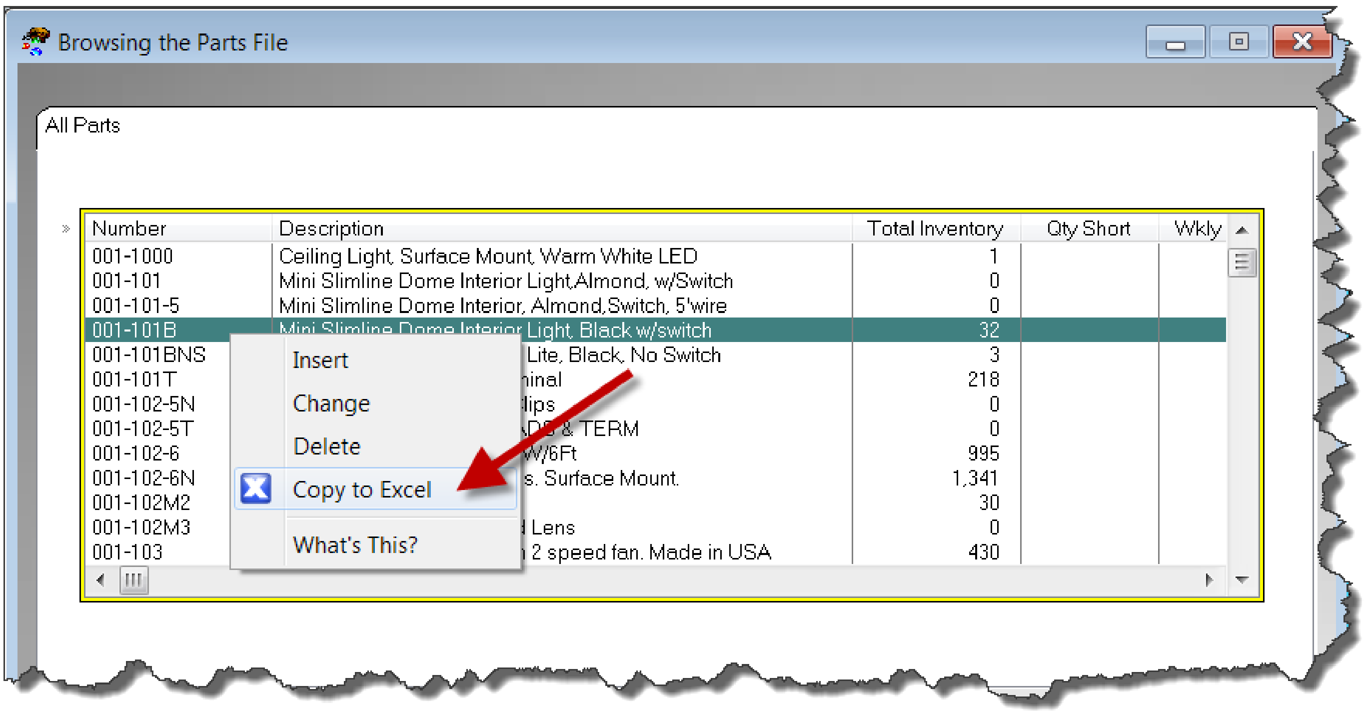
- LastName
- FirstName
- CompanyName
- Address1
- Address2
- City
- State
- Zip
- PhoneNumber
- Fax Number
- CellNumber
- eMailAddress

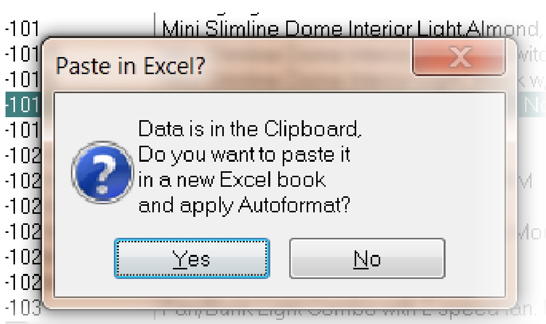
You have the option of adding the marked name information to the existing file, or starting over and creating a file that only contains the current set of names.

The information you select is saved in the installed folder in a file named ExPeople.txt

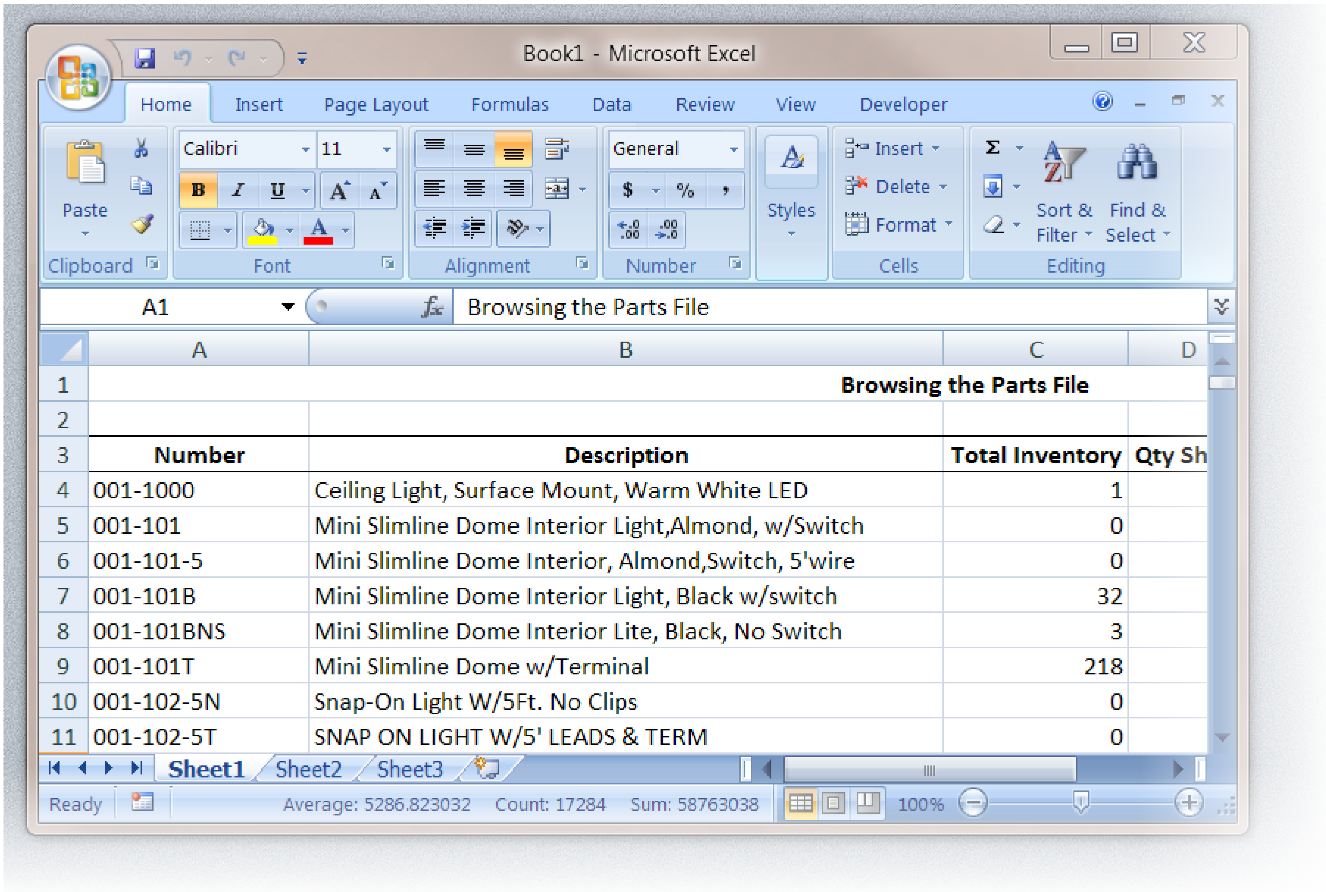
Exporting a Browse Table

Most information in Agenda Development software is displayed in scrolling browse tables or lists. This information can be sorted, filtered and "tweaked" in a variety of ways. Once you have a table showing the information the way you would like it, position your cursor inside the browse table and click the right mouse button. Select the "Copy to Excel" command and all of the displayed data can be put into an Excel spreadsheet.





All of the displayed information is copied into the computer's clipboard. With the click of one button, Excel will start and the selected data will be pasted into an attractive, formatted spreadsheet.


Book1 - Microsoft Excel
Home
Insert
Page Layout
Formulas
Data
Review
View
Developer
Calibri
11
General
Insert
Delete
Format
Paste
Styles
Sort & Filter
Find & Select
Clipboard
Font
Alignment
Number
Cells
Editing
A1
Browsing the Parts File
A
B
C
D
Browsing the Parts File
Number
Description
Total Inventory
Qty Sh
001-1000
Ceiling Light, Surface Mount, Warm White LED
1
001-101
Mini Slimline Dome Interior Light,Almond, w/Switch
0
001-101-5
Mini Slimline Dome Interior, Almond,Switch, 5'wire
0
001-101B
Mini Slimline Dome Interior Light, Black w/switch
32
001-101BNS
Mini Slimline Dome Interior Lite, Black, No Switch
3
001-101T
Mini Slimline Dome w/Terminal
218
001-102-5N
Snap-On Light W/5Ft. No Clips
0
001-102-5T
SNAP ON LIGHT W/5' LEADS & TERM
0
Sheet1
Sheet2
Sheet3
Ready
Average: 5286.823032
Count: 17284
Sum: 58763038
100%

Deleting Old Quotes

For all practical purposes, there is no need for you to delete old quotes. MasterQ can work with an unlimited number of quotes.

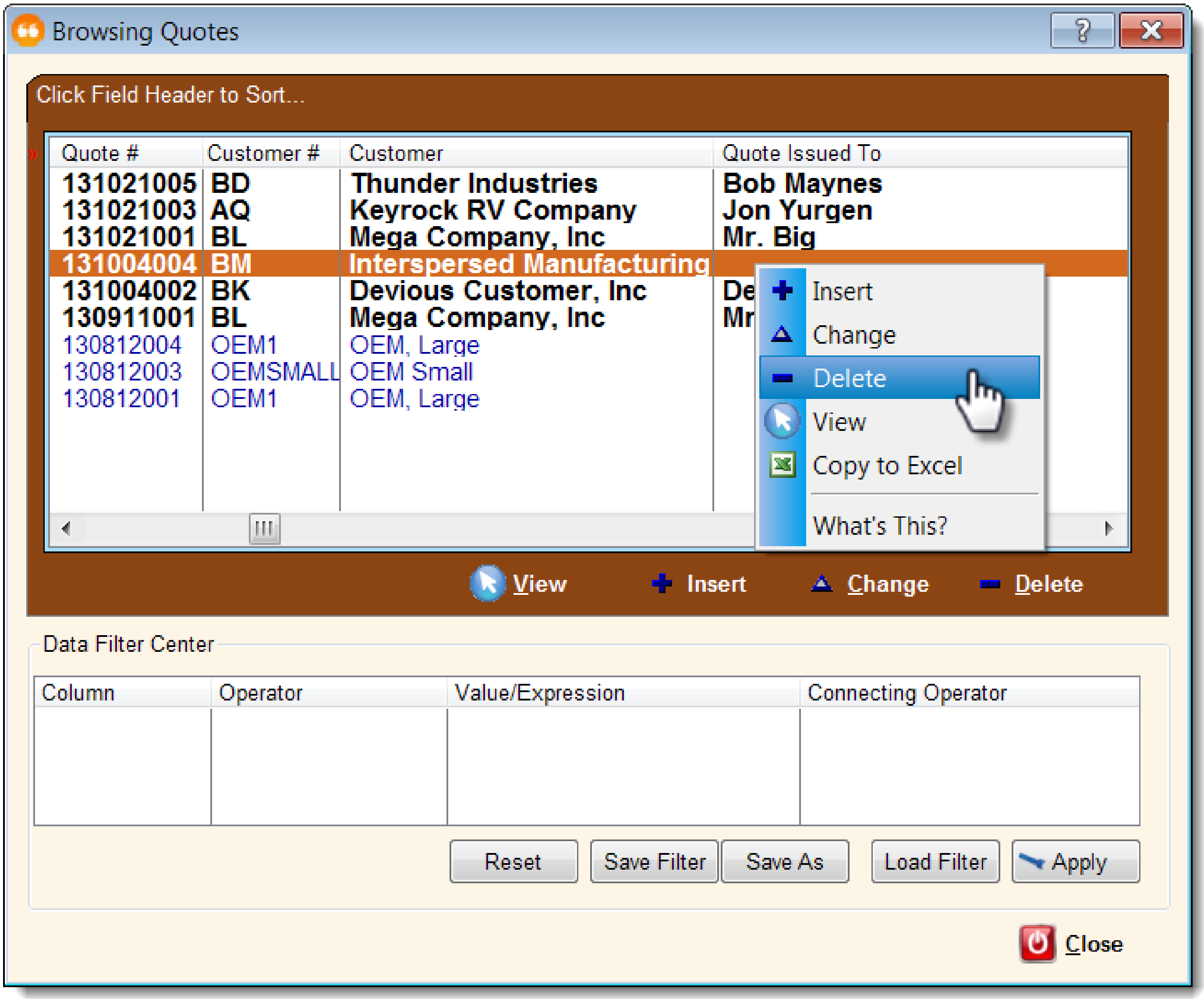
However, the value of quotes you created many years ago is of questionable value in many cases. Additionally, you may find that it is easier to find things that you *need* if you don't have to browse through many items that you don't need. If you find that the system is feeling sluggish you may choose to delete older quotes using one of the methods described below.

In any case...

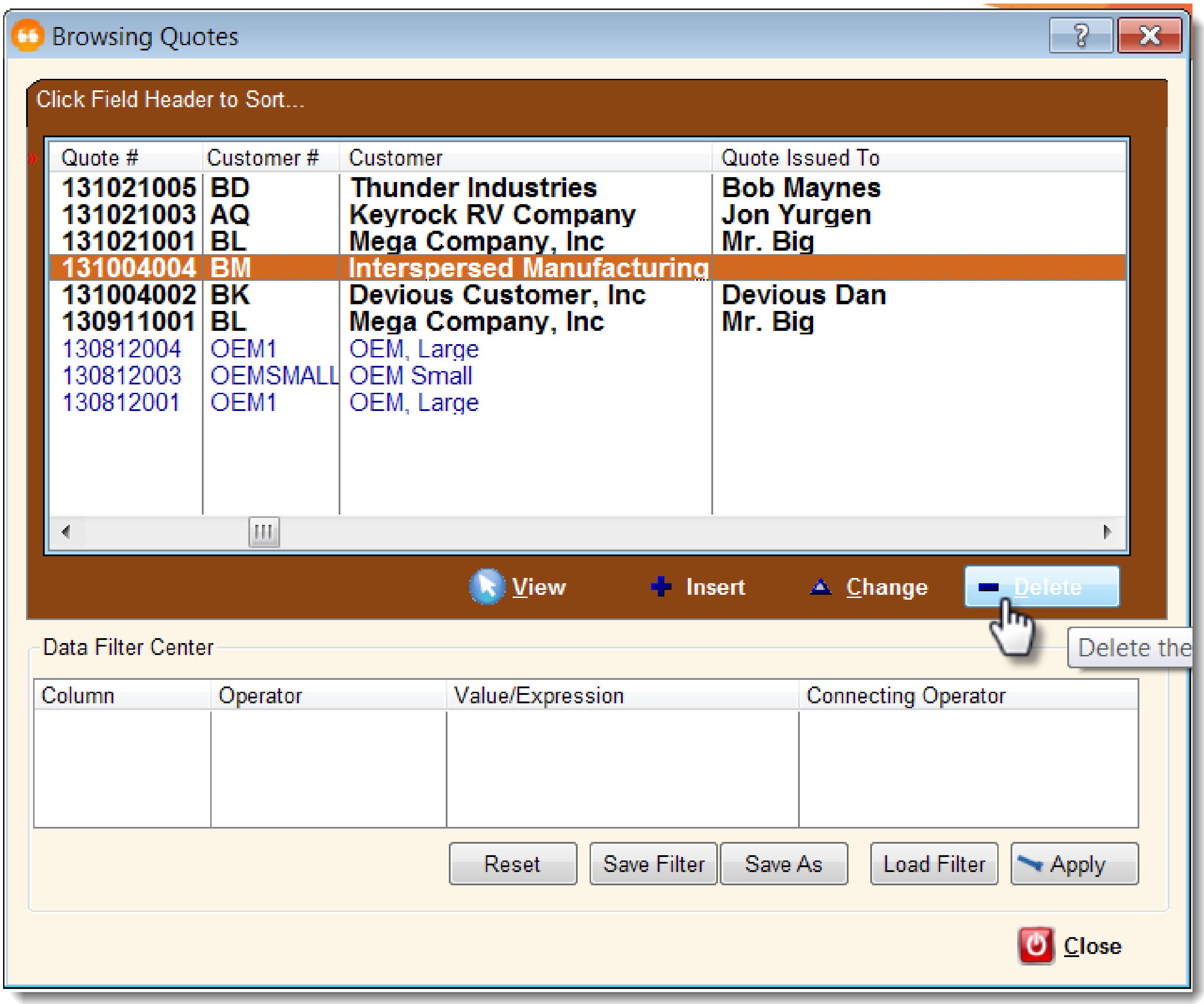
Remember that your quotes are ultimately build as Word documents and are saved in the appropriate customer's folder below the Correspondence folder in your installed directory. When you delete a quote from MasterQ, this Word document remains un-touched. While it will not appear in your database listing of quotes, it is still available if you need it.

Deleting One Quote

The quickest way to delete one quote is to right click the desired quote and select Delete.



The same thing can be accomplished by highlighting the quote you wish to remove and clicking the delete button.

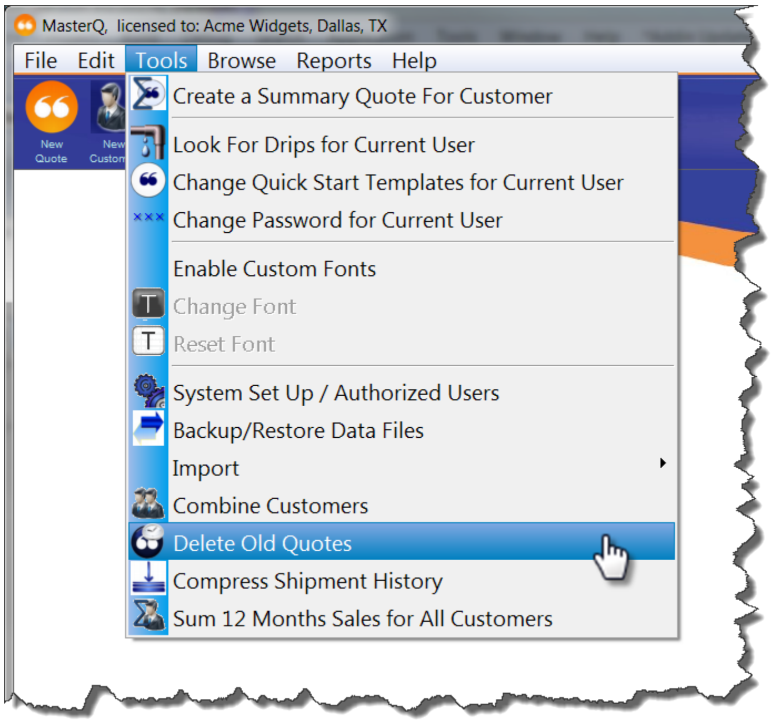


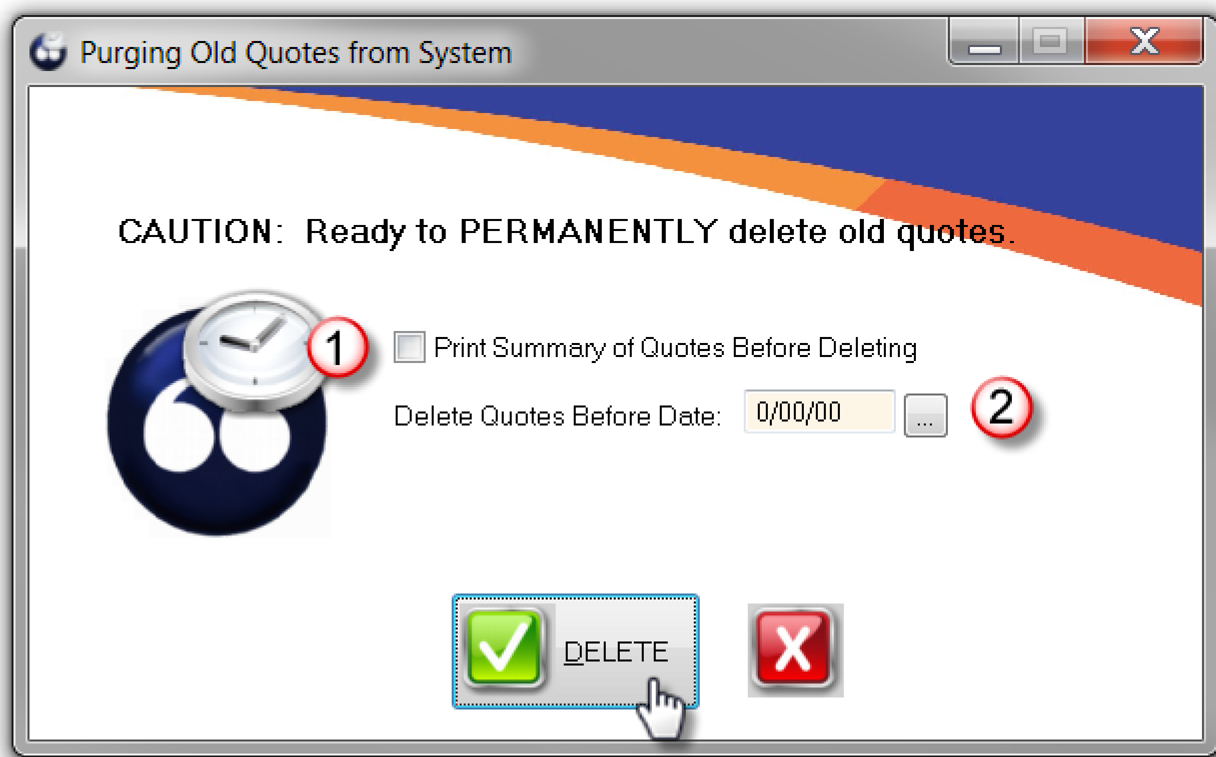
Remember: This only removes the quote from the list of completed quotes. The original Word document remains in the customer's correspondence folder.

Deleting Multiple Quotes

For general housekeeping, this is the most efficient way to delete old quotes.

From the main menu, select the **Tools|Delete Old Quotes** command.





1 **Print Summary of Quotes Before Deleting** - creates a list of all quotes you will be removing from the system.

2 **Delete Quotes Before Date** - all quotes created earlier than the date you enter here will be removed.

Remember: This only removes the quote from the list of completed quotes. The original Word document remains in the customer's correspondence folder.

Security

A moderate amount of security is provided in the MasterQ program. Each user who is allowed to access the program must be specifically given the ability to create quotes. Users who do not have the authority to view customer prices and quotes are blocked from many aspects of the program, but it is important to remember that the quotes you create are saved as Microsoft Word documents - most likely in a shared folder where people with access to your computer network may have the ability to view.

When a User record is created, a unique name and password are entered. The user also specifies their unique initials that are used to mark certain documents.

When starting the MasterQ program, the user is asked for his name and password. Three wrong password attempts are allowed before the program shuts down. If a user's password has been forgotten, it may be reset in the User's record. For information on how this is done, click here.

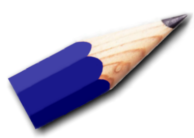
If convenience is more important to you than security, an alternate sign on method is available. Placing the User's name and password on the command line will bypass the sign on procedure saving time.

Logging In

Access to Agenda Development programs is limited to users you authorize. Users can be given rights to run one program (with certain privileges) and be excluded from another entirely if you wish.

By logging in, MasterQ can identify the who the user is. This permits the user to:

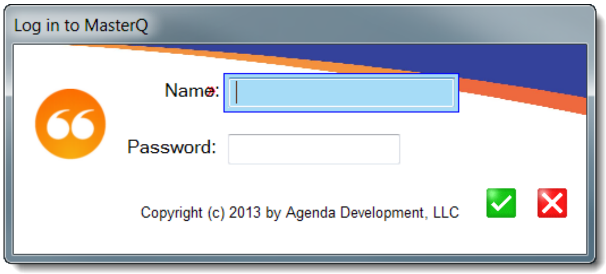
- Have their own unique tear-off short cut menus.
- Use their own unique quote template for creating new quotes.
- Create private notes that are only displayed to them.
- Be granted privileges to access only parts of the program where they have received appropriate training.



TIP: There are many advantages to giving each user their own log on name and password. Using passwords is highly recommended.

Next: Logging in Manually

Logging in Manually



When you start the MasterQ program, the user is given an opportunity to sign on with their unique user name and password. Upper or lower case does not matter.

The user is given three attempts to correctly enter the matching name and password. After 3 unsuccessful attempts, the program ends.

Any user can log in from any computer on your network. Users *can* log in more than once at the same time.

Next: Logging in Automatically

Logging in Automatically

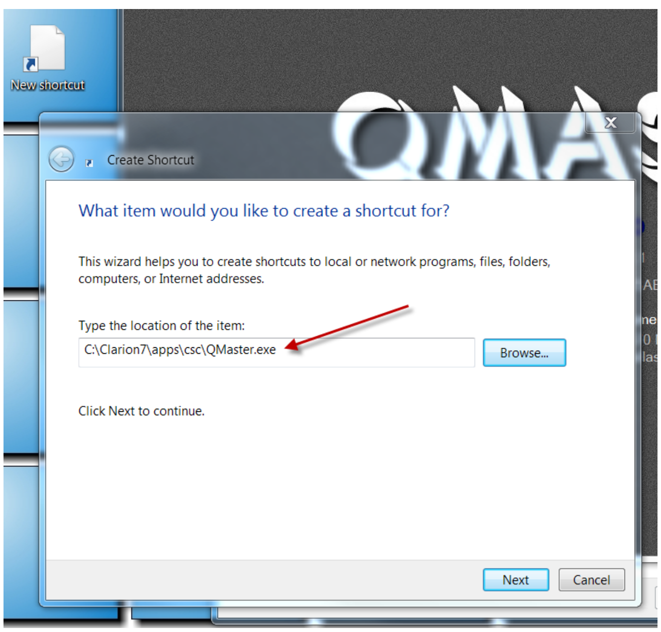
For convenience, users may put their user name and password on the command line when creating a shortcut on their desktop. If a valid user name and password is on the command line, MasterQ logs the user in and the normal log in screen is bypassed.

But consider this...

Anyone who has access to the user's computer can log in as the user and make any changes the user is authorized to perform.

The user's name and password could be viewed by a non-authorized user and, since all Agenda Development software uses the same name-password, the non-authorized user *could* use the compromised password to log into MasterQ as well as other Agenda Development software even if the name-password was not stored in *that* shortcut.

Creating a Desktop Shortcut that Logs the User in Automatically



This feature is not supported in some versions of Windows.

Create a new shortcut on your desktop by right-clicking the desktop and choosing NEW | SHORTCUT. Use the BROWSE button to navigate to where your Agenda Development programs are installed and double click on the MasterQ.EXE program.

If you wish to start the program without needing to enter your user name and password each time, *add* your user Name and Password after the program name in all capital letters separated by spaces. This will bypass the sign in screen each time you start MasterQ, but anyone with access to your computer can easily sign in as you by just clicking the icon on your desktop.

NOTE: This may not be as insecure as it sounds. You may consider, *who* has access to your computer? Does your operating system require a password to log into your network and/or access your desktop?

NOTE: If you set up your shortcuts to include your user name and password, even though you may not seem to sign in, MasterQ recognizes *you* as the current user and shows *you* as being the author of any documents you create.

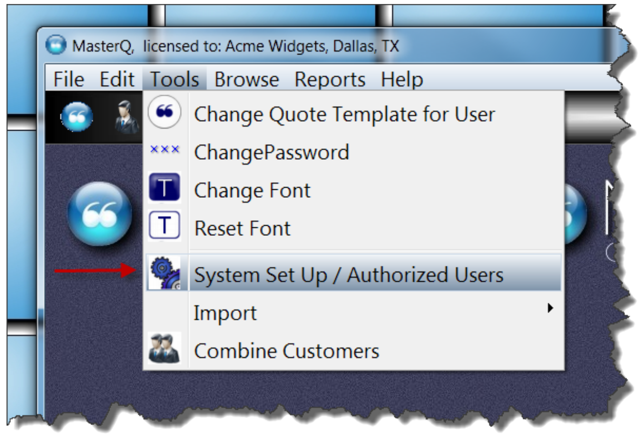
TIP: If your computer is reasonably secure, starting MasterQ with the command line password is a real time saver!

TIP:

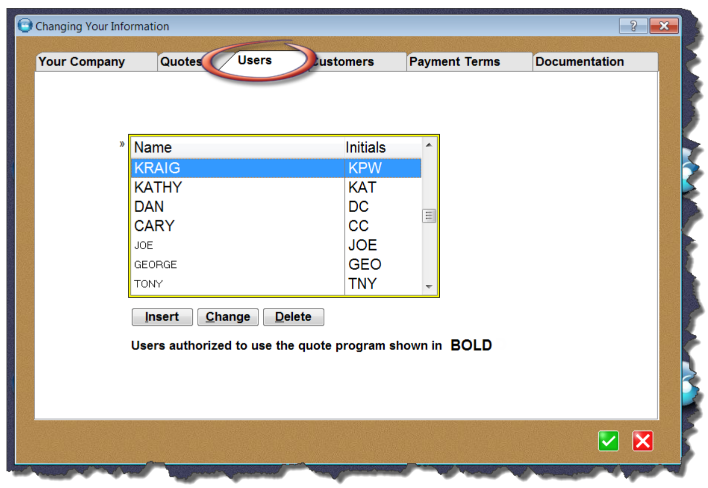
You should probably *not* use the automatic log in if one computer is shared among several users, or if you computers are in an unsecure area.

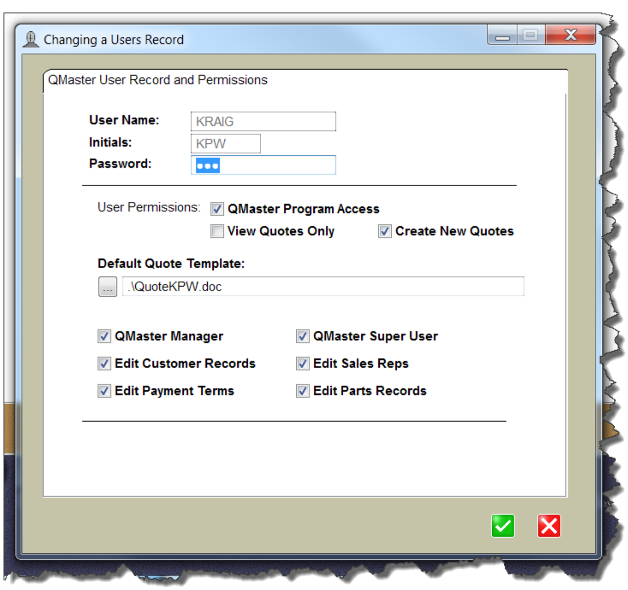
Changing passwords for users

Passwords are created when a new user record is set up. You can reset a user's password (if your user record is designated as a super-user) by clicking on TOOLS-SYSTEM SET UP from the main menu. This is helpful if the user forgets their password.



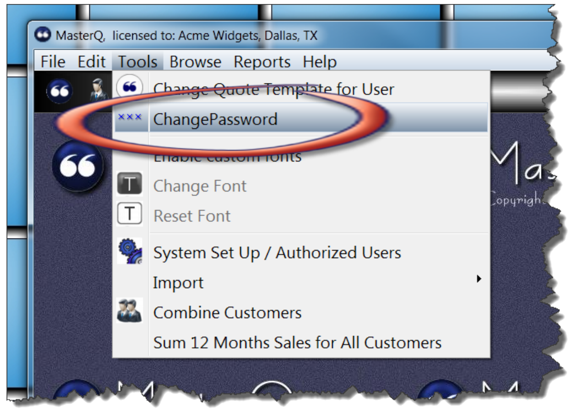
Select the Users tab to see all authorized users for all Agenda Development programs. Note: This list includes users who may be authorized to use *other* Agenda Development programs, but not necessarily access the MasterQ program. Users who *can* access the MasterQ program are listed in **BOLD**.



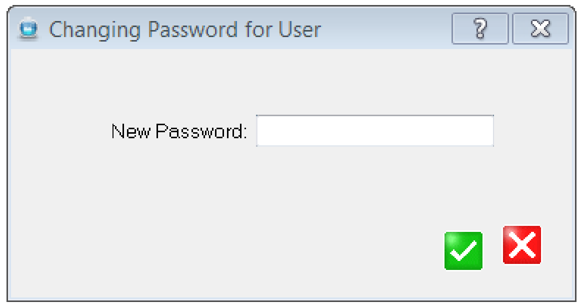


The new user password may be entered here. Once saved, the new password is available for the user to use.

How to change your own password



Occasionally a user may wish to change their password. This can be done by the user without assistance from a super user.
The user should sign into the program then select TOOLS|CHANGE PASSWORD
from the main menu.



A simple form allows the new password to be entered.

Passwords can be up to 15 characters in length. Any number or letters may be used. Case is not considered.

NOTE: Once a user record is created, the user's sign on name and initials cannot be changed.

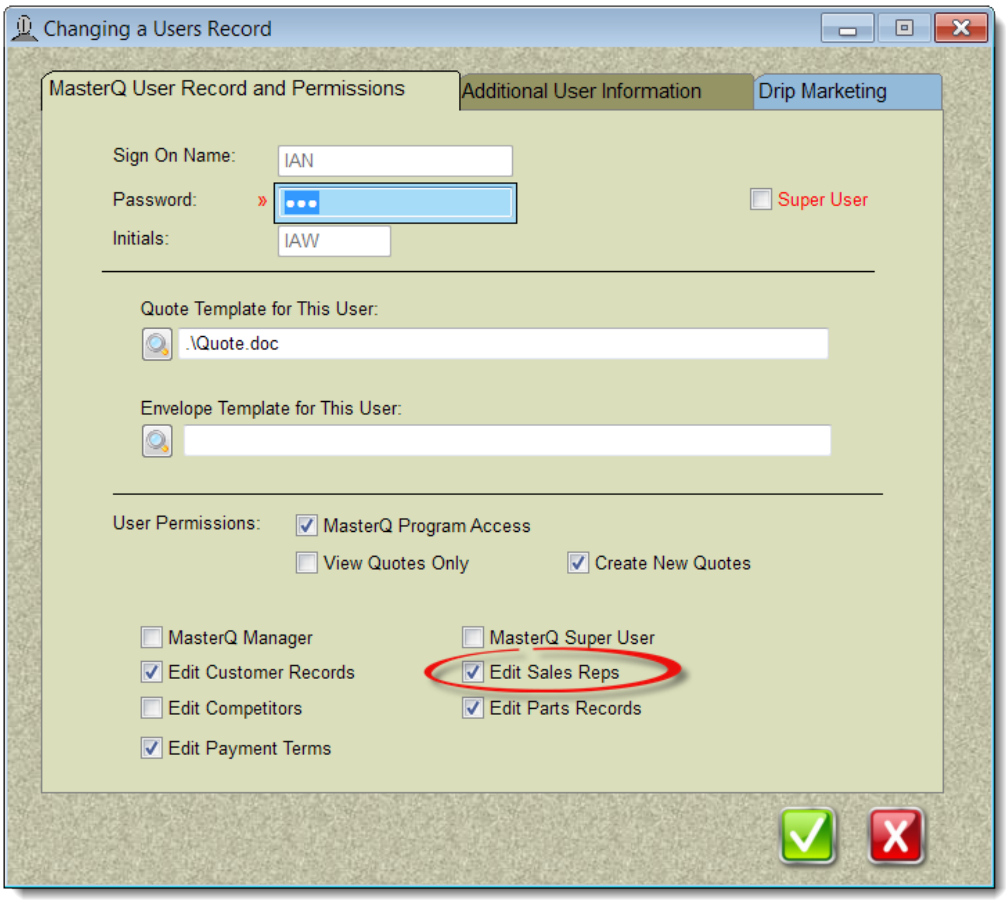
How To...

In this section, we will review some of the common tasks that you will accomplish with MasterQ.

Creating a New Salesman

Who can create a Salesman record?

To create a new salesman record your user account must have the Edit Sales Rep box checked, or your user record must show that you are a super user or a MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)

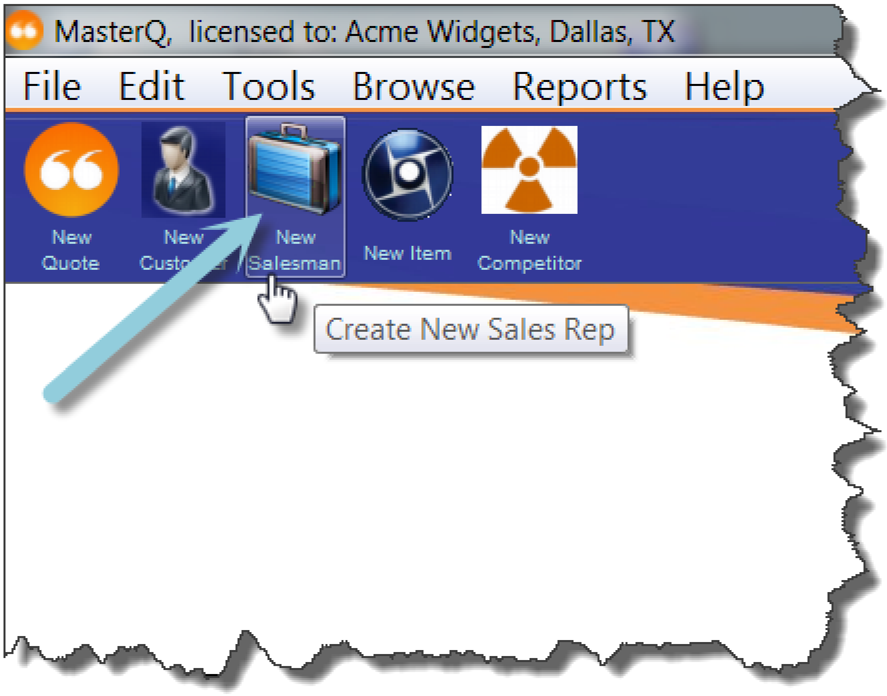


More information about setting User abilities is available here.

If your user account does not have the proper authorization to make these changes, then New Salesman button shown below will be disabled.

Creating a Salesman record

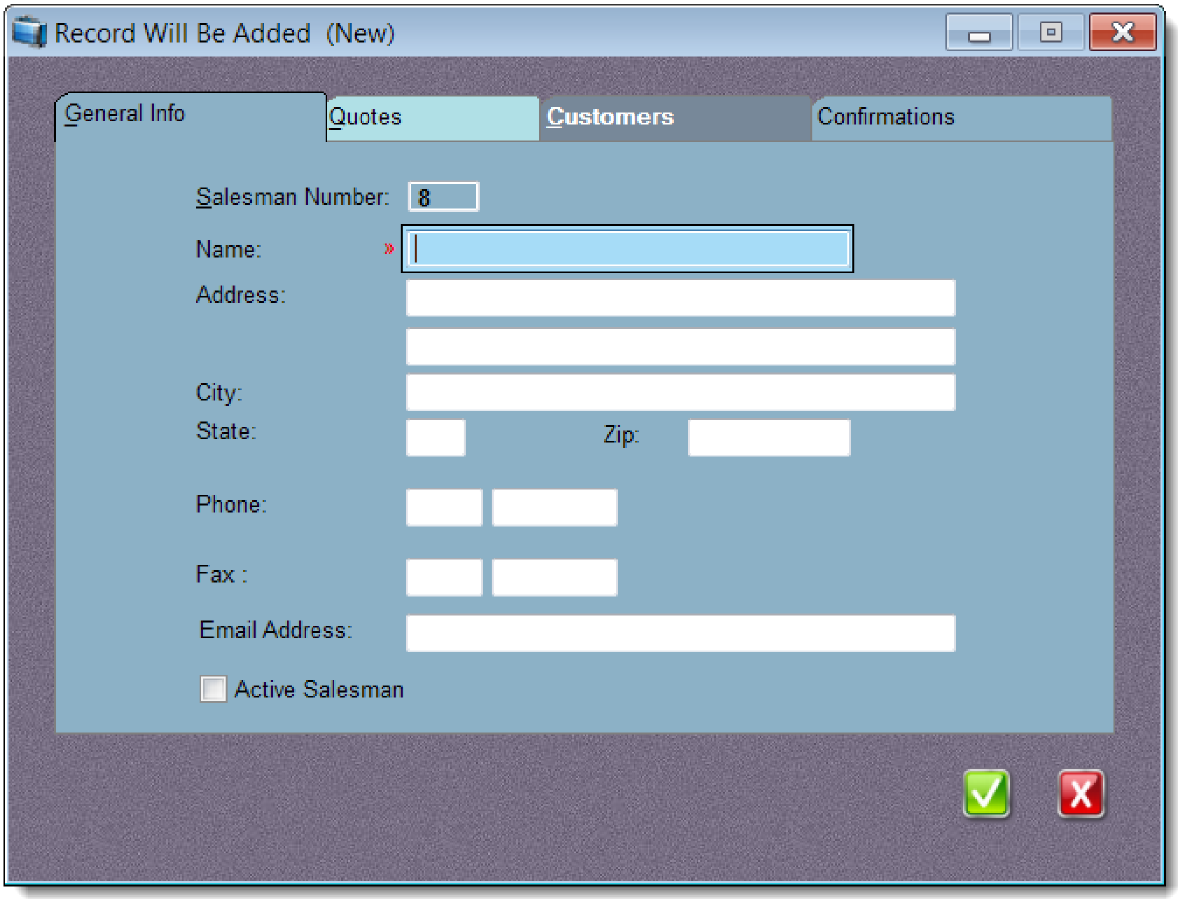
The easiest way to add a new salesman record is to press the shortcut button at the top of the MasterQ window.



If you prefer, you could use the **Browse|Sale Reps** command from the main menu and press the Insert key. In either case, you will then see the blank Sales Rep record. The salesman number is automatically assigned for you.

TIP: Set up salesman number 1 as your House account. This is the "sales rep" that will be assigned if no other entry is made.

Watch a [video showing how to add a sales rep]() here.



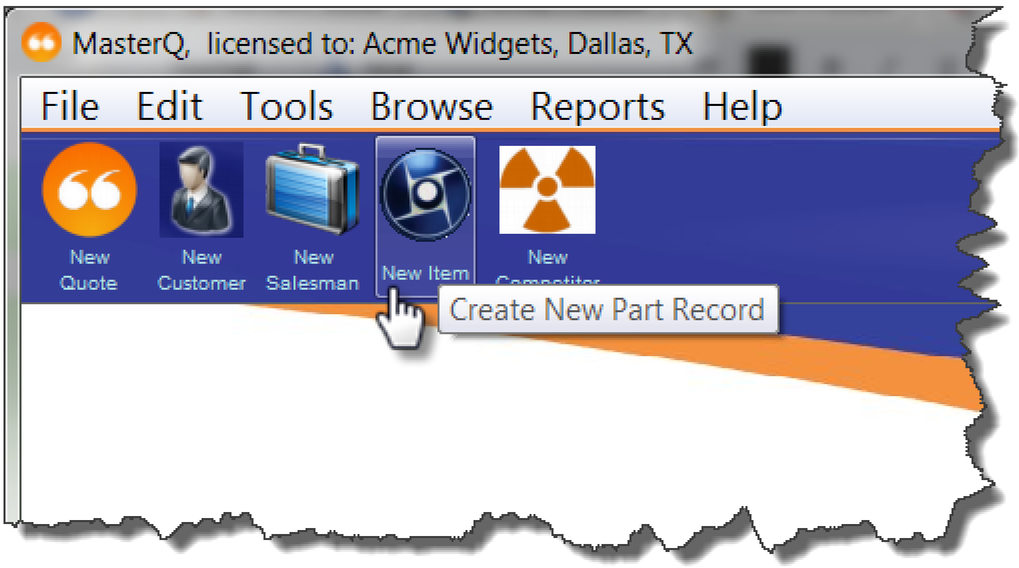
Each salesman requires a unique name. Other fields are optional. Some fields may be used by other Agenda Development programs.

Creating a New Item Record

You must have the Edit Parts Records attribute checked in your user record to add new part numbers. If this attribute is not checked, the New Item button will be disabled. To see how to enable this feature for a user, click here.

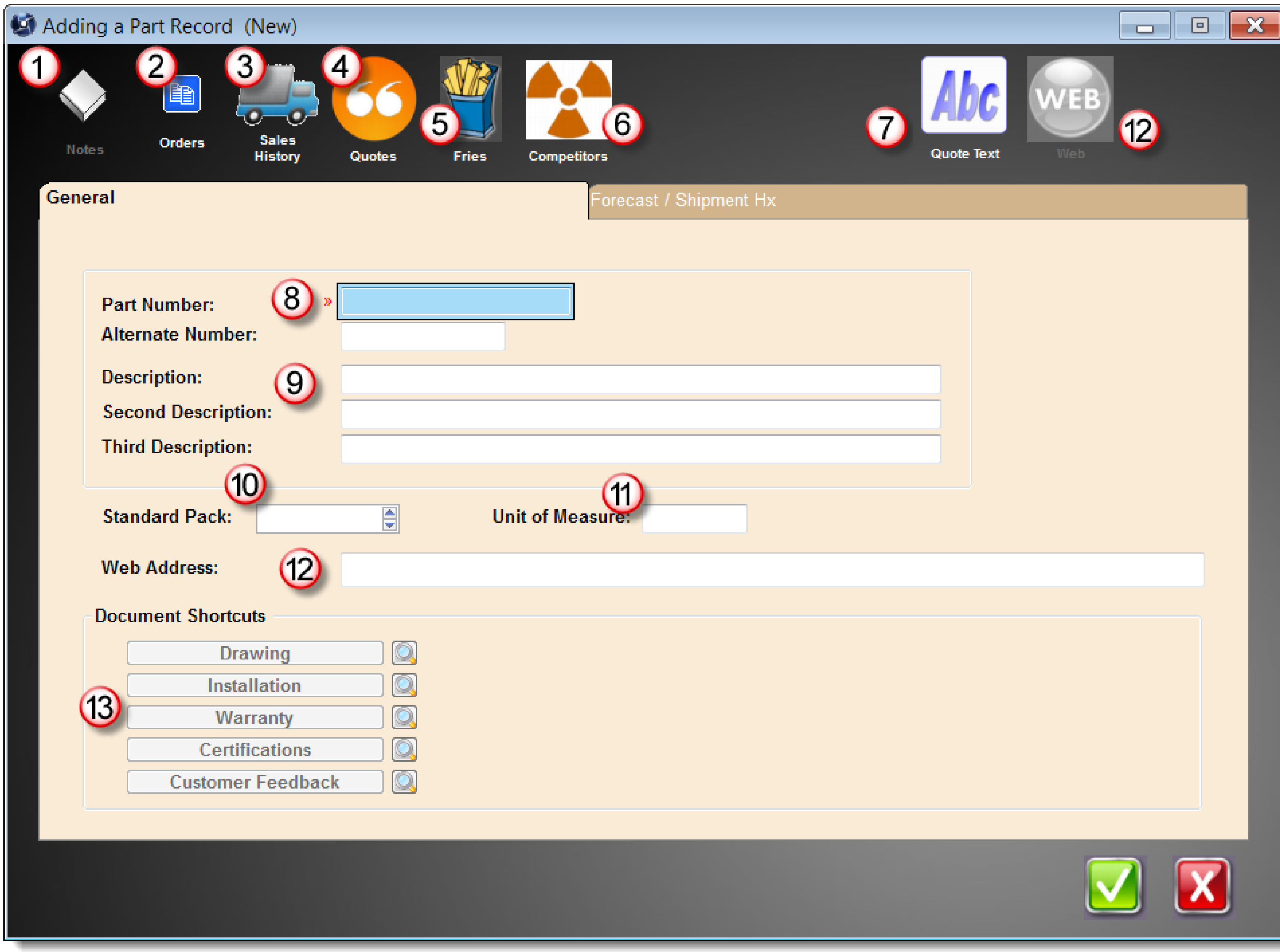
Adding items one at a time is an easy way to get started now. You'll only need to enter the information for each item one time. At a minimum, all you need to enter is the part number and a description. However, the information you enter can be shared by everyone in your organization and will become a valuable tool.

To add a item manually, press the New Part shortcut button.



Next: Adding a Part Record

Adding a Part Record (New) window



Other fields and tabs may appear on the part form if you have additional Agenda Development programs or modules installed.

NOTE: When creating a *new* item, some of the following buttons may be temporarily disabled until after the part record is saved.

Notes Button

An unlimited number of notes can be attached to each part. This button will display a list of all notes. More information about the various notes features is available here.

TIP: An Open Book icon indicates that there *are* notes for this part. If no notes have been created, the icon is a Closed Book.

2

Orders Button

If you import customer orders, this button will display a list of current open orders for this part.

3

Sales History Button

If you import sales history, this button will display a list of previous sales for this part.

4

Quotes Button

This button will display a list of quotes you have issued for this part to all customers.

5

Sales "Fries" Button

This button will display a list of related items your customer may wish to consider when purchasing the current part.

This feature is available in the MasterQ-Pro version.

TIP: Just like the "fries" offered to you at the drive up window at your favorite fast foot provider, *asking* often results in increased sales. You can set these fries to be displayed automatically. This option is set in the System record. this part.

6

Competitors Button

This button will display a list of items your competition offers. You can include information regarding pricing, features, anything that might be helpful.

This feature is available in the MasterQ-ENT & PRO versions.

7

Quote Text Button

MasterQ enables you to fully describe your offering in all the detail you need to make a persuasive, compelling proposal. Pressing this button will open a text editor allowing you to create an almost unlimited description of your product or service. The actual limit is 4,000 characters.

This feature is available in the MasterQ-Pro version.

8

Part Number

A unique part number assigned to this part.

TIP: Use a consistent part number format. Never use your vendor's part number as your own. Avoid using the letter "O". Do not use punctuation. Never include spaces.

9

Short Description Lines

There are three lines of text that are used for short descriptions of your items. These descriptions are used by various Agenda Development software.

The first line is used when browsing tables that list part numbers. This is the description you will see when you are selecting an item from a list.

The second line and third line allow you to add additional information. **It is important to understand that these descriptions are used by other Agenda Development programs and not just MasterQ.**

When you create a new item, initially there is no text description to use in a quote. The first and second lines of text are used as the default text for quotes until you make changes. (See 7 above.) The third line is not copied into the initial quote text.

10

Standard Pack

This is the default quantity that will be inserted into your quotes. Typically this might be your carton size. If you do not sell multiple items, leave this item blank or zero.

11

Unit of Measure

This is an informational field and does not print on your quotes. It may be useful in helping you understand *what* you are quoting. Typical entries might be Each, Foot, Gallon, Pound, etc.

12

Web Address

If you have a website with information about the item, enter the site here. An example might be www.agendadevelopment.com/MQ/index

When a website has been identified, the Web button in the upper right corner of the window is enabled. That button will open your web browser and take you to the page you have identified with one mouse click.

Document Shortcuts

These buttons are links to files related to this part. There is a lookup button to the right of each button. Use that button to point to the desired file. Once a file has been attached, the button is enabled. This allows instant access to the desired file when viewing the part record.

The labels on these buttons as well as the default folder the related files are located in are set in the System record. These descriptive labels can be set to whatever you require. More details are available here.

TIPS:

The only information required when setting up a new item is a unique item number, and a description. The description does not *need to be* unique, but it is certainly helpful if it is.

The standard pack quantity is the default quantity that will appear on your quotes, although you may change this for each individual quote as you like.

Items must exist in the parts database to be considered in the quotes you prepare. If your business model requires you to quote items that are *proposed* parts rather than "real" products, you may wish to use a special part numbering scheme. Perhaps using the customer number as a prefix.

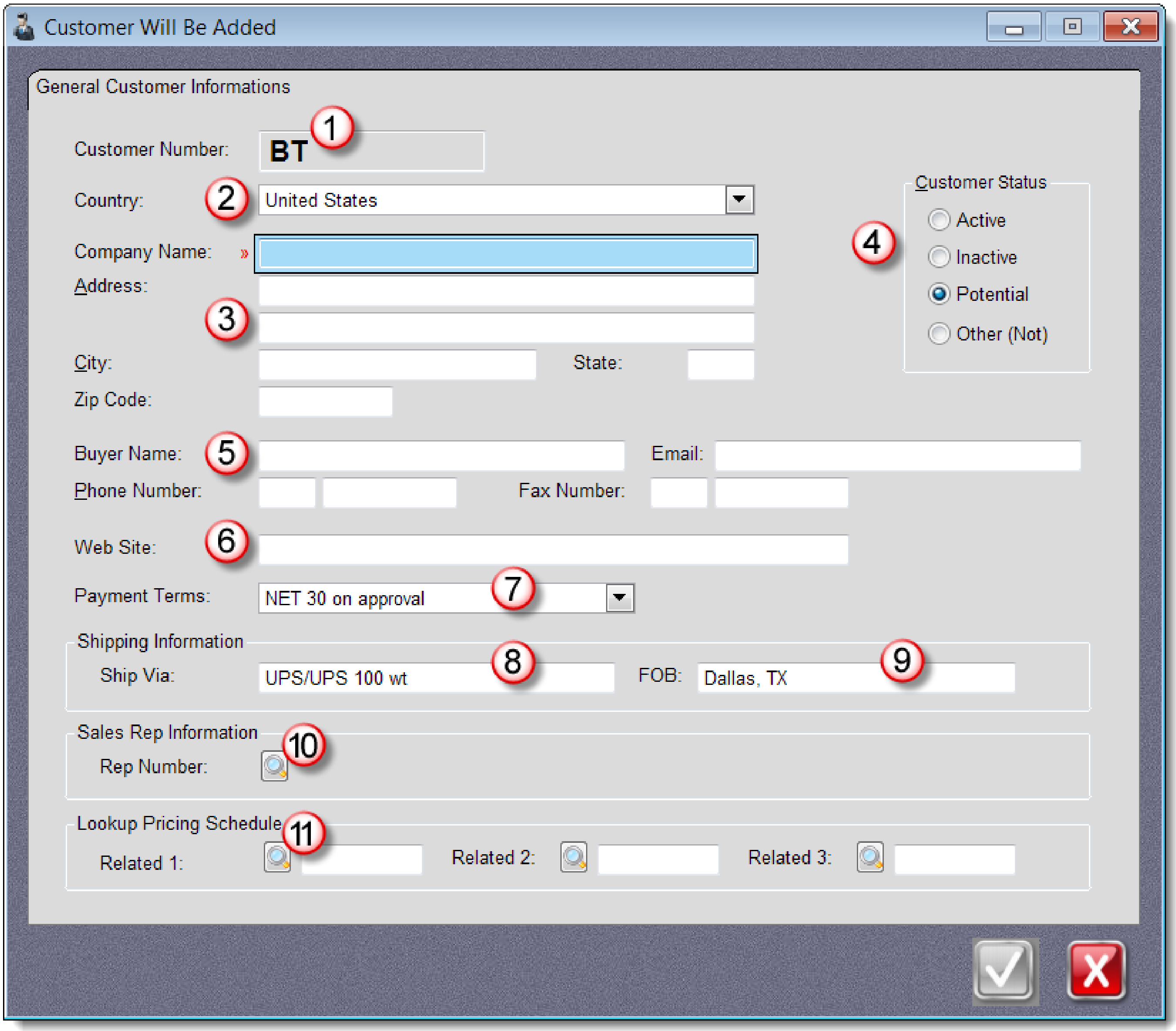
Create a New Customer Record

Information about your customers is kept in a special database. Once a customer is in your system, you may easily select the customer when creating a quote and all relevant information will be copied into the document. (of course, you can change it if you need to)

This same information is used by other Agenda Development programs to process & track customer returns and to create NAFTA documents.

Who can create or change a Customer record?

To create or change a customer record your user account must have the Edit Customer Records option box checked, or your user record must show that you are a super user or a MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)



1	**Customer Number** - depending on the options you have set, MasterQ may set the customer number for you automatically. You may change this number if you choose.
2	**Country -** Select the country for this customer. Setting this may change the layout somewhat. (eg - zip code becomes postal code, etc.)
3	**Company Information: Name, Address, City, State, Zipcode** - or customer name if you sell to individuals. This is the default address information that will be applied to all new quotes and contacts. Of course you can modify it later. TIP: Enter the zip code and MasterQ will fill in the city and state. TIP: To avoid duplicate customers, it may be helpful to recognize other customers you have dealt with in the same area.

4	**Customer Status -** This is entry is used for filtering the list of customers you create. When creating new quotes, customers marked as OTHER (not customer) are not displayed.
5	**Default Buyers Name & Contact Information** - Quotes will default to this person, but you can select from anyone else you know at the customer. Of course, you can add new names too.
6	**Web Site -** Enter the customer's web site here. This will enable the Web button on the view customer form allowing you to jump to their web site with one button click.
7	**Payment Terms** - Select from any of the payment terms you have set up. The entry you specified as the system default payment terms when you set up the system record will be pre-filled for you when creating new customers.
8	**Ship Via** - The default Ship Via you specified in the System file is used when you create a new customer, but of course it can be changed. Your quotes do not need to include ship via information if this is not applicable to your business model.
9	**FOB** - The default FOB you specified in the System file is used when you set up a new customer, but of course it can be changed.
10	**Sales Rep** - Press this button to select a salesperson from the list of sales people you have set up.
11	**Look Up Pricing** - You may enter up to three related companies for this customer. Parent or related companies for example. When a quote is created, MasterQ will check to see if the current customer has purchased or has been quoted on the part you are quoting. MasterQ will then check each of these three related companies and tell you if any of them have purchased or have been quoted. See some clever applications of look up pricing here.

Next: Changing an Existing Customer Record

Look Up Pricing

Have you ever quoted a different price to a customer who is already purchasing your product? It's a no-win situation. Quote a higher price and you'll get hammered. Quote a lower price and... well, you still get hammered, don't you?

MasterQ includes a clever feature that will tell you if a customer has purchased an item before or if the customer has been quoted an item previously.

But MasterQ actually can go further than that. You can enter up to three related customer numbers for each customer. When an item is quoted, MasterQ will check *their* records and warn you if you have quoted or sold an item to them and tell you what price was used and when.

You can be clever with this feature, too. Set up a customer with an ID of 'Retail' or 'OEM' or 'Distributor' or any other descriptive name you wish. Create a quote for that "customer" for all of your parts. (Tip: You may consider using the Summary Quote feature to build this quote)

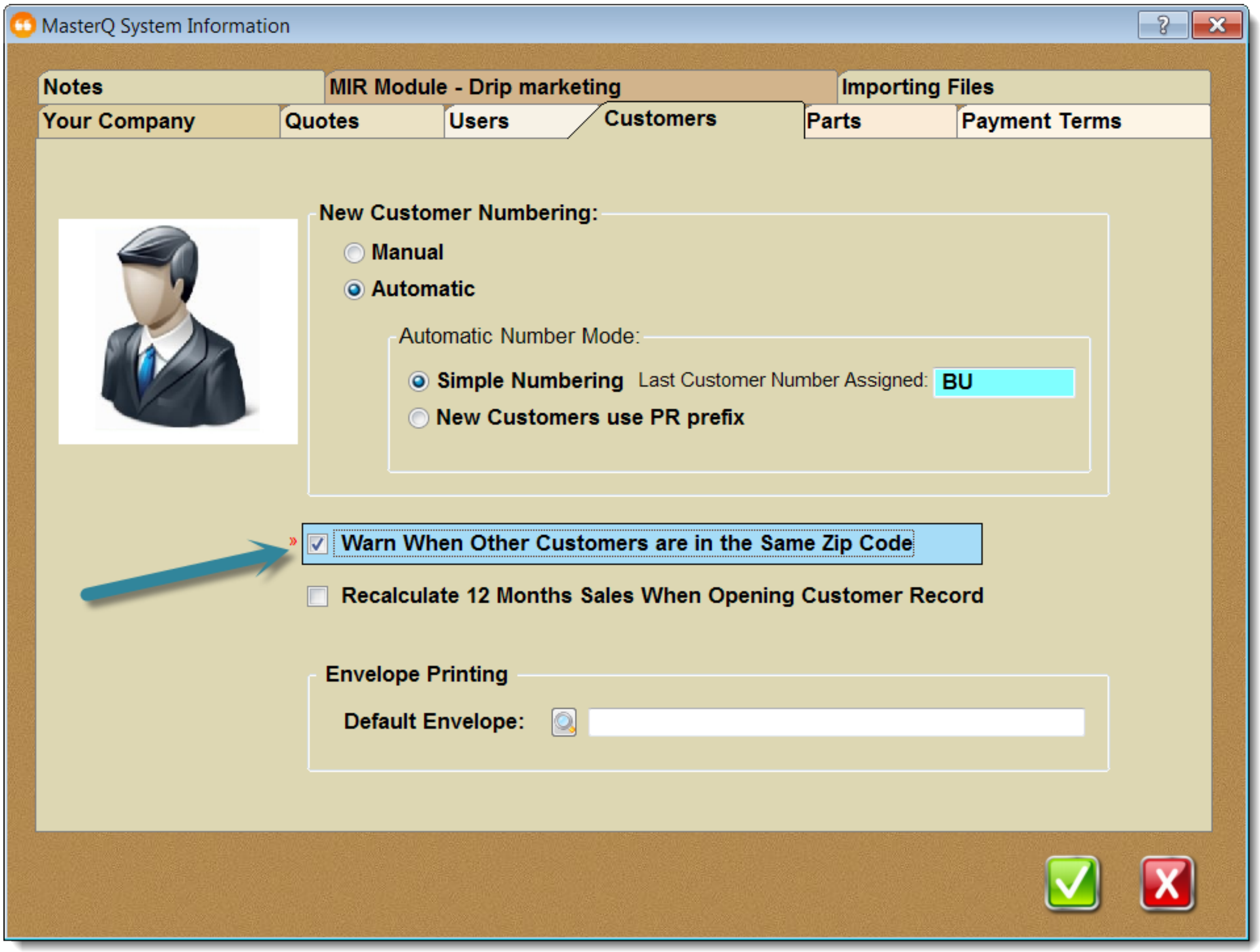
Then put the newly created customer ID in as a related look up. Any time you quote a customer who is identified as "OEM", a message will pop up showing you the current "OEM" pricing for the item.

Customers In the Same Zip Code

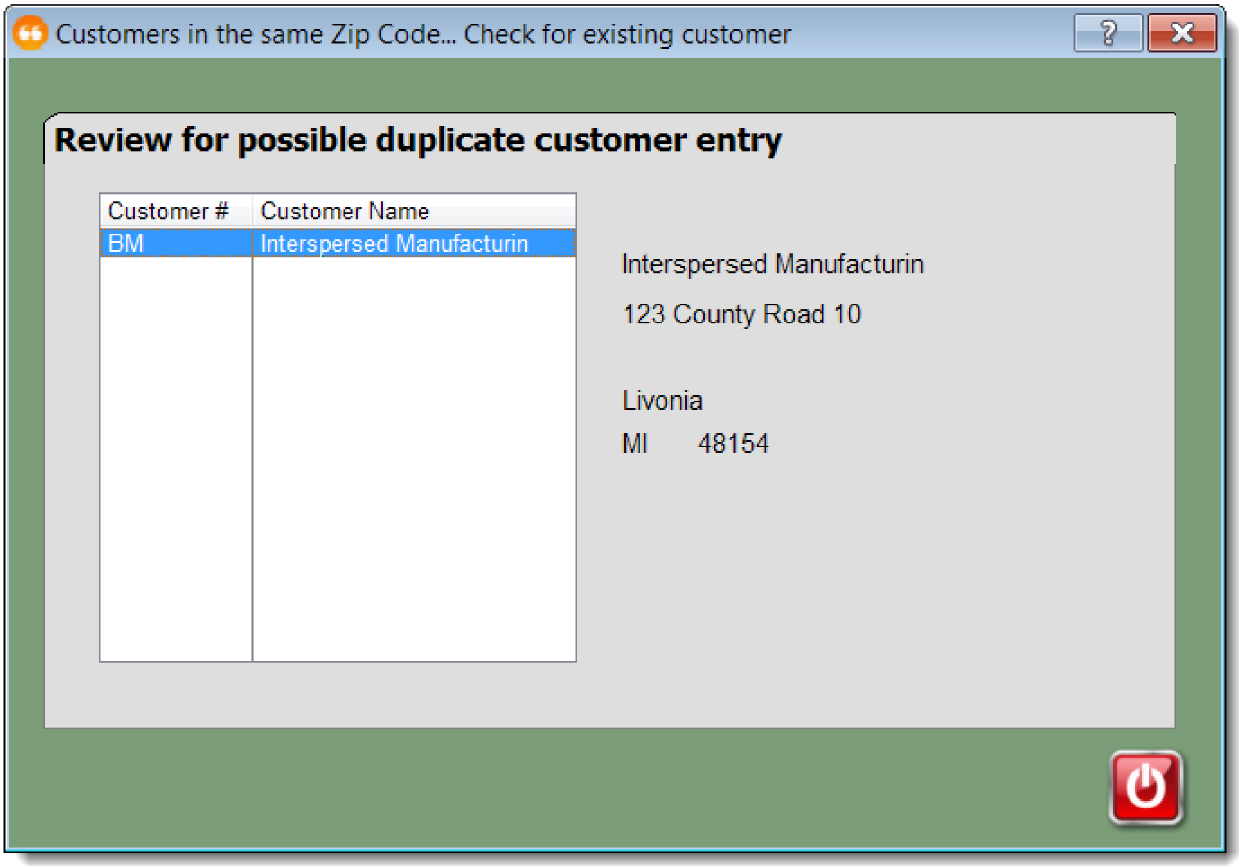
In some circumstances, it may be of interest to know if you have other customers in the same zip code as the customer you are creating. MasterQ can do this for you automatically.

Use the **TOOLS | SYSTEM SET UP** command on the main menu. (Your user account must be authorized as a super user or manager to access this command.)

On the Customers tab, check the "Warn When Other Customers are in the Same Zip Code" option.



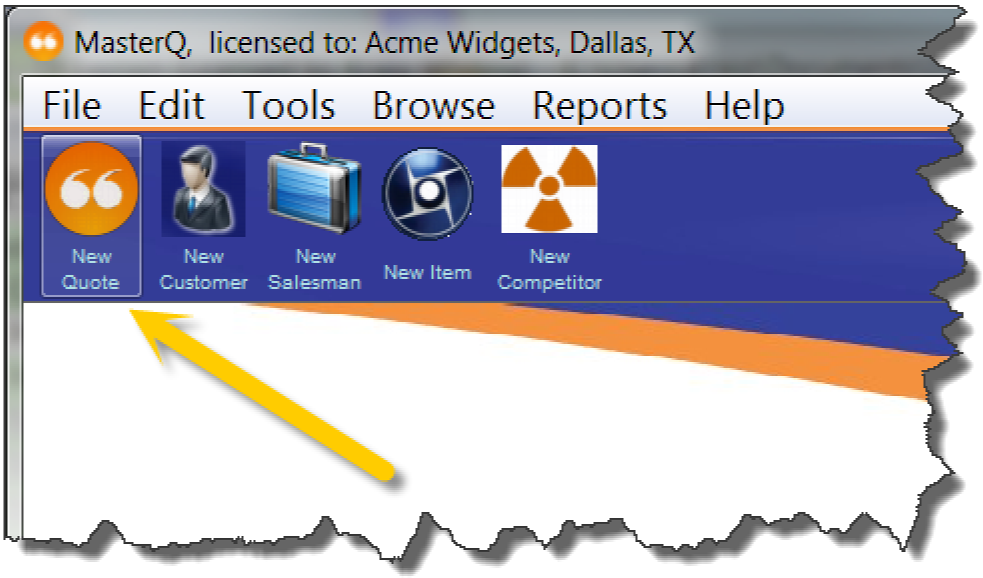
When you set up a new customer, MasterQ will check for other customers in that zip code. If any are found, they will be displayed in a list for your review:


Customers in the same Zip Code... Check for existing customer
Review for possible duplicate customer entry
Customer #
Customer Name
BM
Interspersed Manufacturin
Interspersed Manufacturin
123 County Road 10
Livonia
MI
48154

Creating a New Quote

NOTE: The quote being created is not "official" until you press the Create button. If the quote form is cancelled or closed or the power goes off before the Create button is pressed, your changes are discarded.

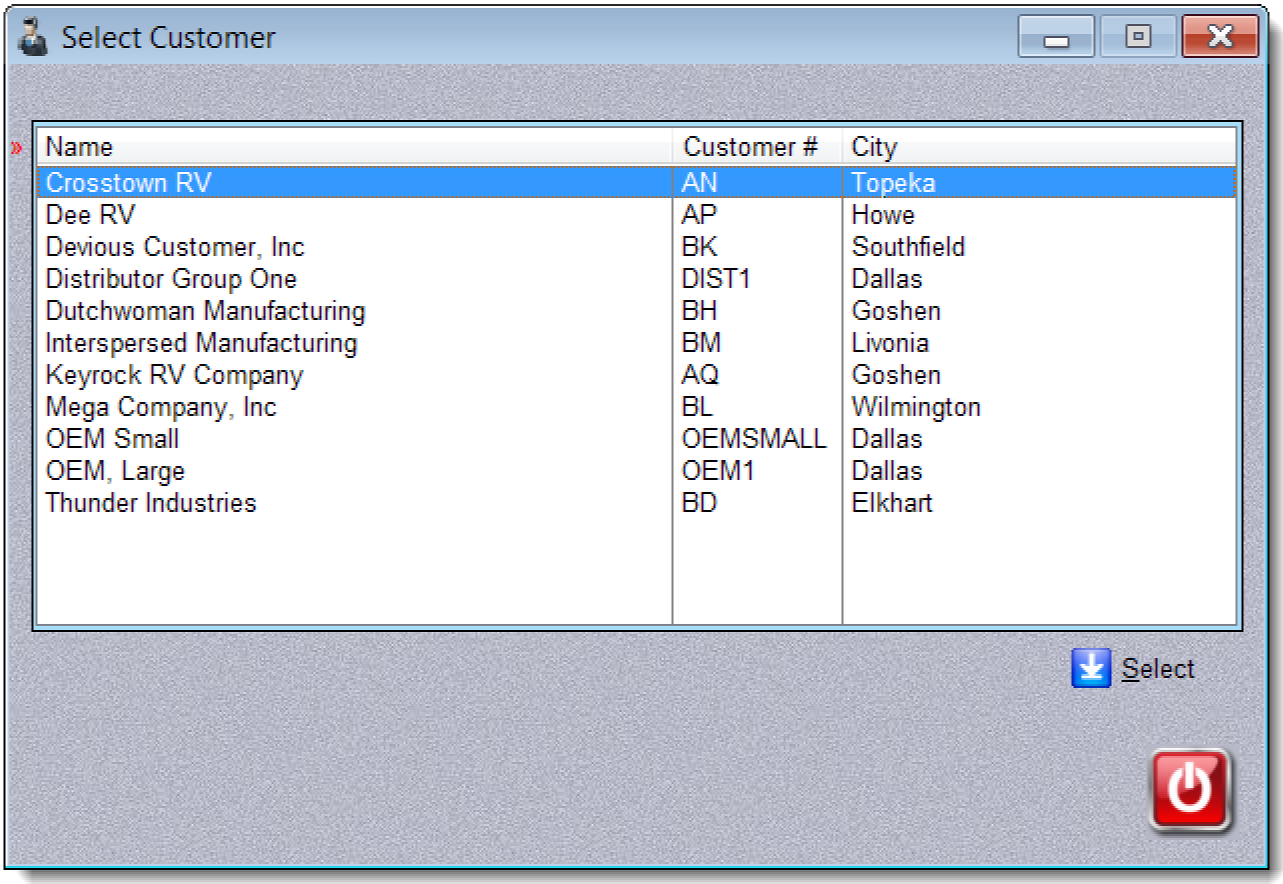
The easiest way to create a new quote is by pressing the New Quote button located just below the main menu.



You can also begin a new quote when browsing the existing quotes and pressing the insert key, or right clicking the list of quotes and selecting Insert.

Selecting a Customer for the New Quote

When you press the New Quote button, you will first select *who* the quote is being issued to.



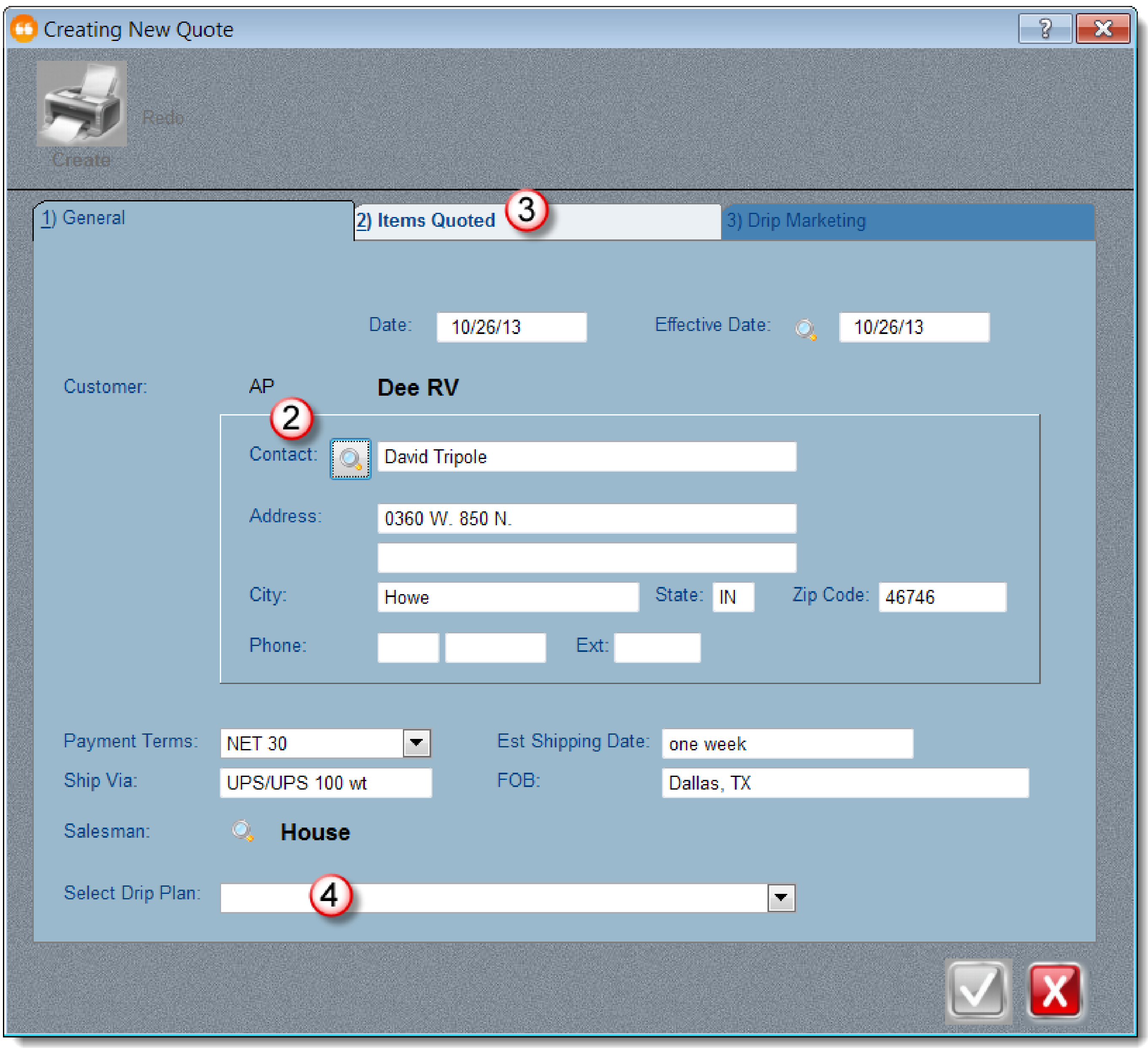
Need to add a *new* customer or prospect? Click here.

Adding and Editing Customer Information

Once you have selected a customer, most entries are pre-filled for you automatically. These include the customer's address, payment terms, sales representative, ship via instructions, FOB and the effective date. This information is pulled from the customer's record, or if no entry has been made in the customer's record, the default values you entered in the system record will be used.

To see how to change the default entries for a particular customer, click here.

To see how to change the default values to use for all customers who do not have special instructions you've set in their customer record, click here.



2 The customer's "default buyer" name is entered on the form initially. If this quote is being addressed to another contact at the customer's facility, press the look up button to select from a list of contacts you have there. If this is a new contact at an existing customer, simply enter their first and last name here. MasterQ will add it to your list of contacts for future reference. (If only a first name is entered, it will *not* be automatically added to the list of known contacts.)

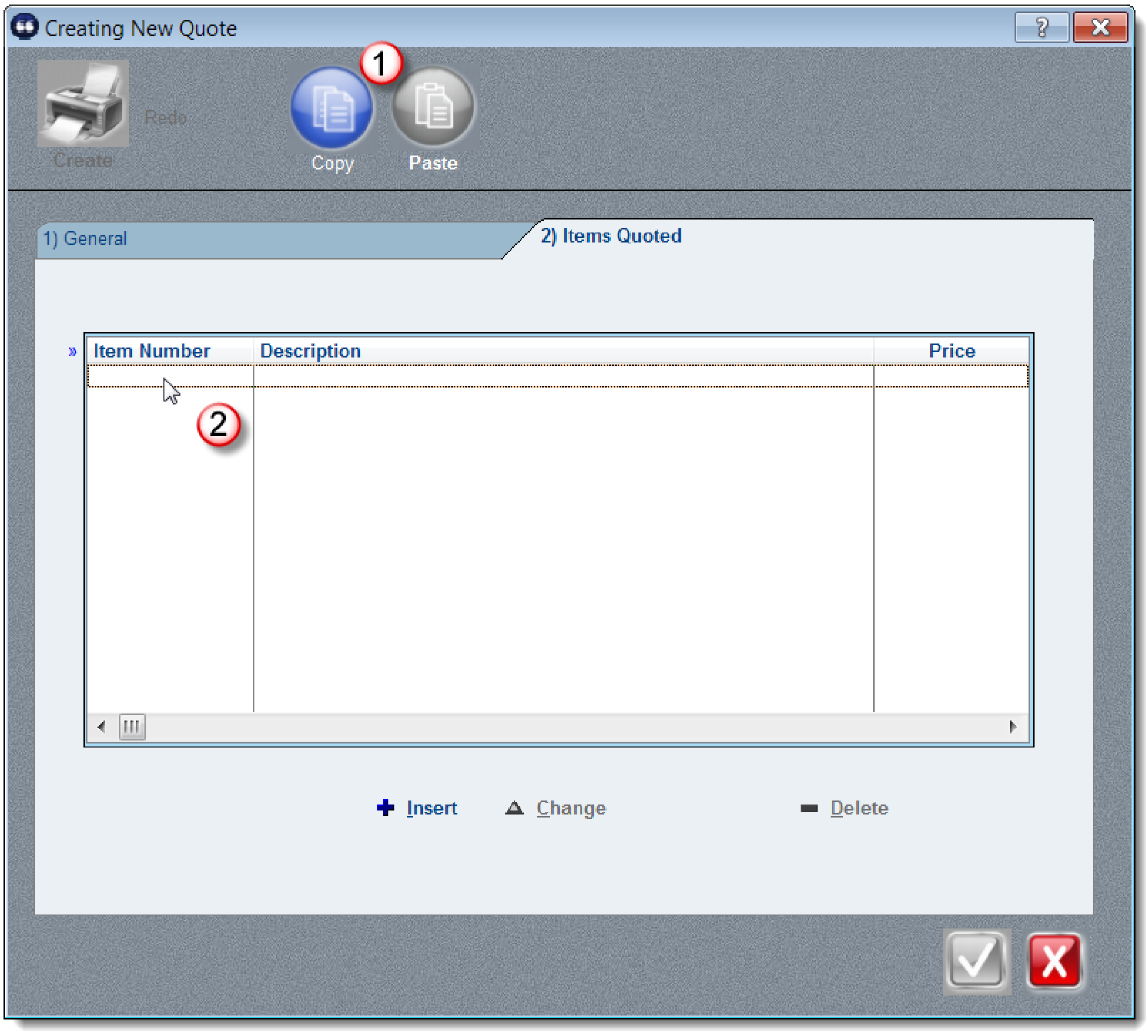
3 Once the customer has been selected, the Items Quoted tab is enabled. Click on this tab to add items to the quote.

4 MasterQ-PRO users have the ability to add drip marketing plans as the quote is created.

Reviewing the Items that will be Quoted

Below is the view you will see when the Items Quoted tab is initially selected.

Note: the Create button in the upper left corner and the OK button in the lower right corner are disabled until you have quoted *at least* one item.

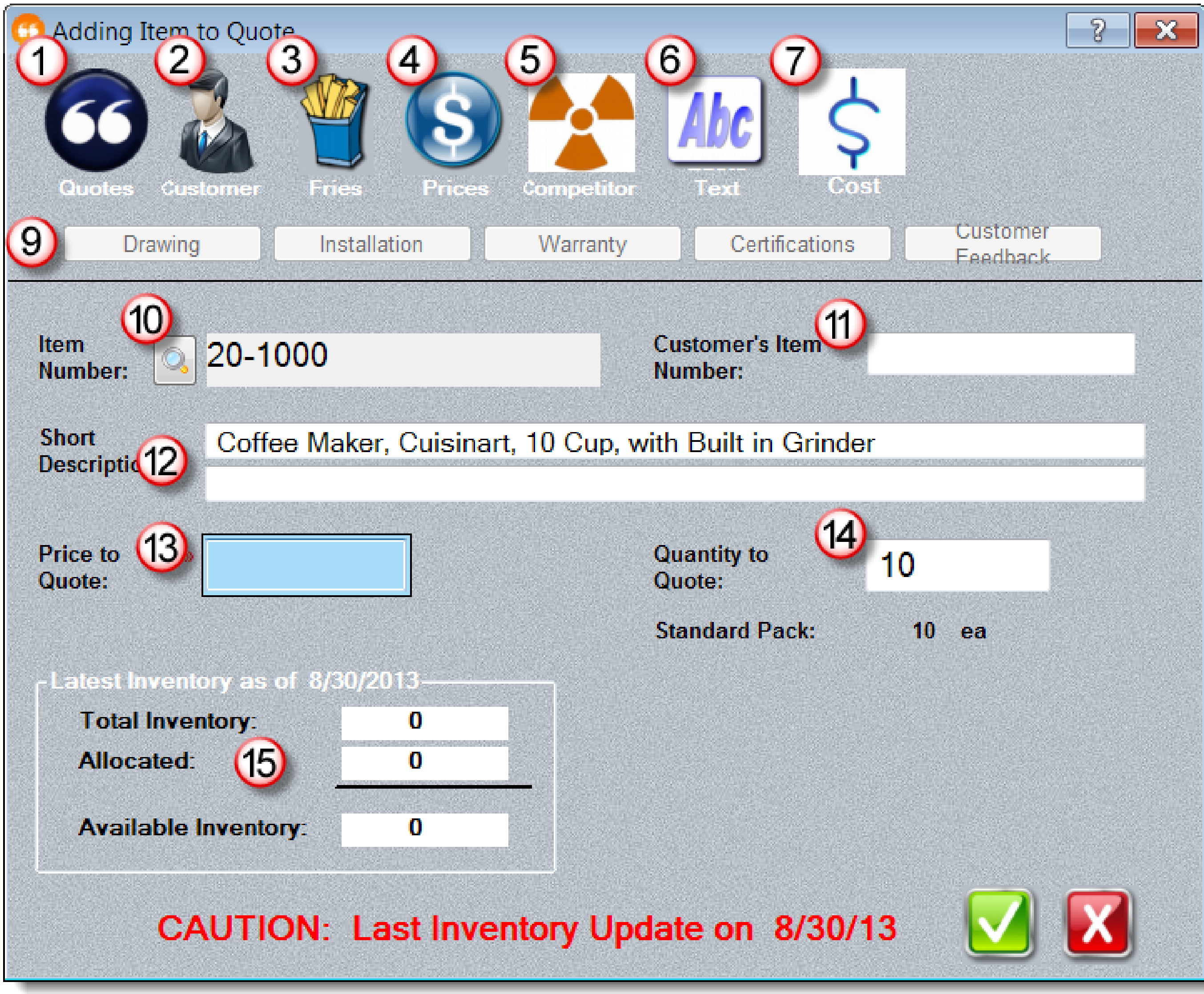


1 — The copy and paste buttons are used to transfer a list of quoted items from a previous quote to this one. This feature enables you to duplicate quotes easily. These buttons can be ignored for now.

2 — In the item list you may add an item by either pressing the insert button, pressing the insert key on your keyboard, or by right clicking inside the list and selecting Insert.

Adding an Item to the Quote

Note that most of the items shown on the window below are disabled until you select an item to quote.



1 **Previous Quotes Button** - displays a list of other quotes you have issued to various customers for this part.

2 **Customers Recent Sales Button** - Shows who currently buys this item. Each active customer is listed only once, showing their most recent quantity and price paid. The list is sorted by date with the most recent sales listed first.

3 **Fries Button** - Displays a list of related items you have previously identified to offer when *this* item is quoted.
NOTE: these related items may be shown automatically if you have chosen the Automatically Show Fries option in the System record.

4 **Prices Button** - shows a complete list of other items and pricing the customer being quoted has purchased or has been quoted.

5 **Competitors Button** - Review information you have previously entered regarding the competition. Requires MasterQ-PRO or MasterQ-ENT.

6 **Quote Text Button** - Opens a window allowing you to edit the text that will print on your quote. This text can be quite extensive, up to 4,000 characters.

7 **Standard Cost Button** - Shows the item's standard cost.

9 **Related Documents Buttons** - These buttons allow quick access to the related files you have identified for this item in the part record.   If no file has been linked to the item being quoted, the button will be disabled.
NOTE: The text on the buttons is defined by you and may not match the text shown in this screen view.

10 **Item Number Lookup** - Use this button to select an item from a complete list of parts you have defined.
NOTE: An item number *is* required. But you can use anything as the item number. It does not need to exist in your database. For example, you could use NPN (for 'no part number') or simply use a period in place of a "real" part number.

11 **Customer's Item Number** - MasterQ-ENT has the ability to include customer part numbers in your quotes. If the customer's number has been identified previously, it will appear here automatically. If the field is blank, you many enter the customer's number. Customer item numbers may also be viewed from the customer's record. You can specify the format and location the customer's part number.

12 **Short Description -** Two lines of text to describe the item in a short format. The first line appears in browse tables when you are selecting an item. If you have not created a full text description (see #6 above), then theses two short lines of text will be used for the initial quote text.

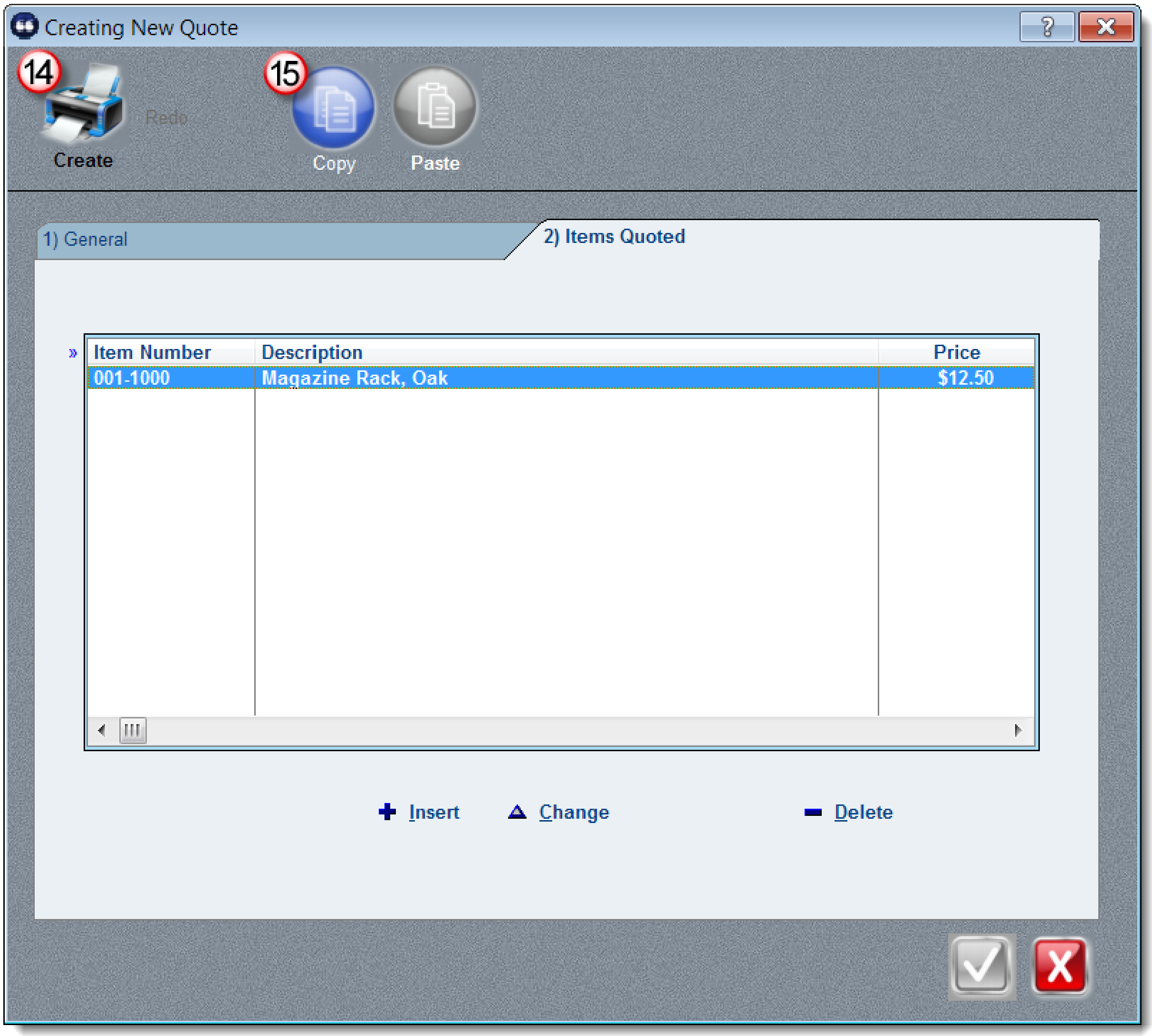
13 **Price -** Finally! The price you wish to quote.

14 **Quantity to Quote -** If you have elected to include quantities on your quotes, this is the number that will be used. Typically, this is your carton quantity, but could be changed to an annual blanket order number if you preferred.

15 **Latest Inventory Information** - MasterQ-PRO and MasterQ-ENT include the ability to import inventories from another program that you use to maintain perpetual inventory positions. MasterQ-ENT can also import customer orders to show how much of your inventory is allocated. This can help advise if you have *available* inventory to sell when preparing a quote.

The above process may be repeated for any number of items you wish to quote. The same item may be added more than once if you wish to quote different prices for different quantities.

Once you have entered at least one item, the quote form will look similar to this:



Create Button - This button is only enabled *after* at least one item has been added to the quote. Pressing this button saves the quote information, creates various notes as you have specified in the System record, opens Word, builds the quote document using your quote template for your review and saves a copy of that Word document in the CORRESPONDENCE folder in a sub-folder named with the customer's number. You can make further changes in the Word document as needed.

Note: the OK button is disabled until after the quote has been created.

Copy Button - may be used to copy the entire list of quoted items and prices to use in another quote.

After creating the quote, the OK button is enabled and may be used to close the window.

Creating a Summary Quote

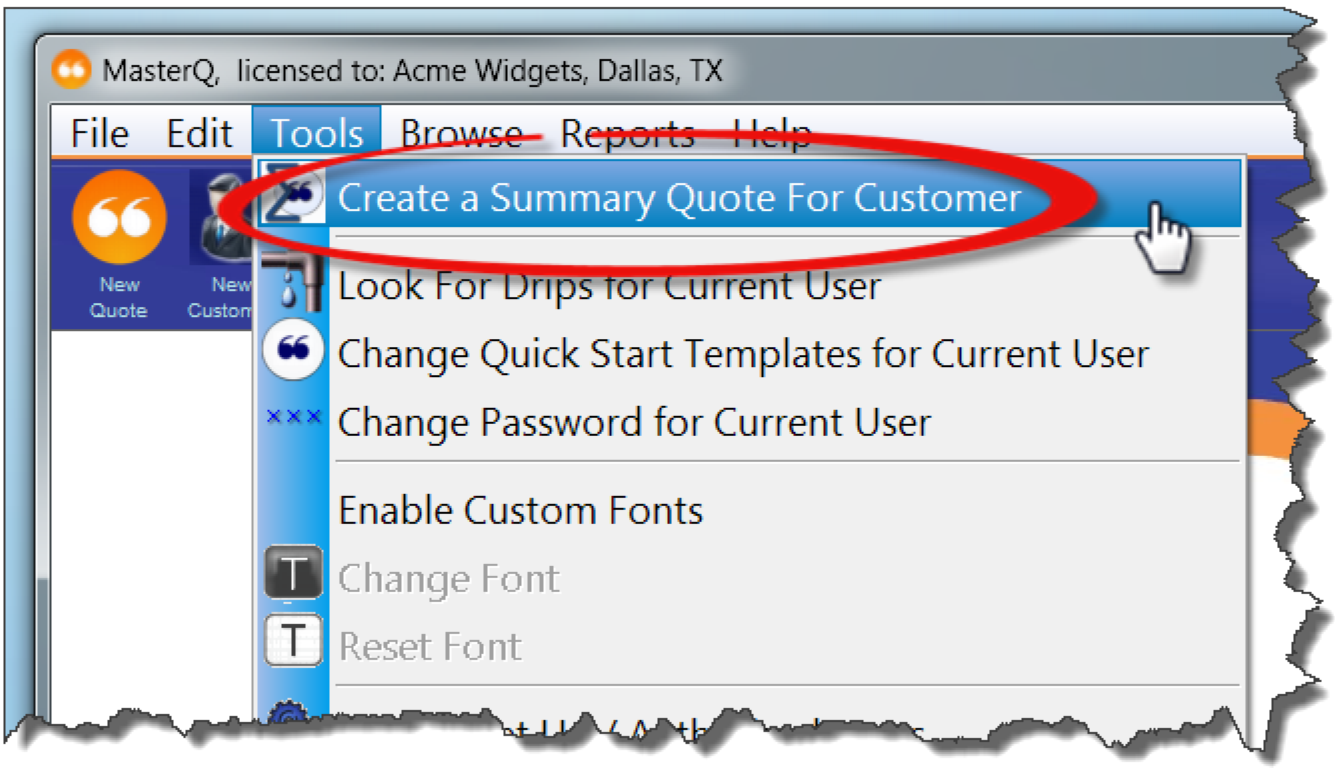
With MasterQ-ENT, you can create a quote that includes *all* of the items a particular customer has an interest in. This can include items that are currently purchased as well as items you have quoted to the customer. And you can do it in seconds.

This tool can also be helpful when creating a master price schedule for generic customers.

You also have the ability to combine additional customer's purchases and quoted items into the summary quote you are creating. And of course, you can manually add or remove items as needed.

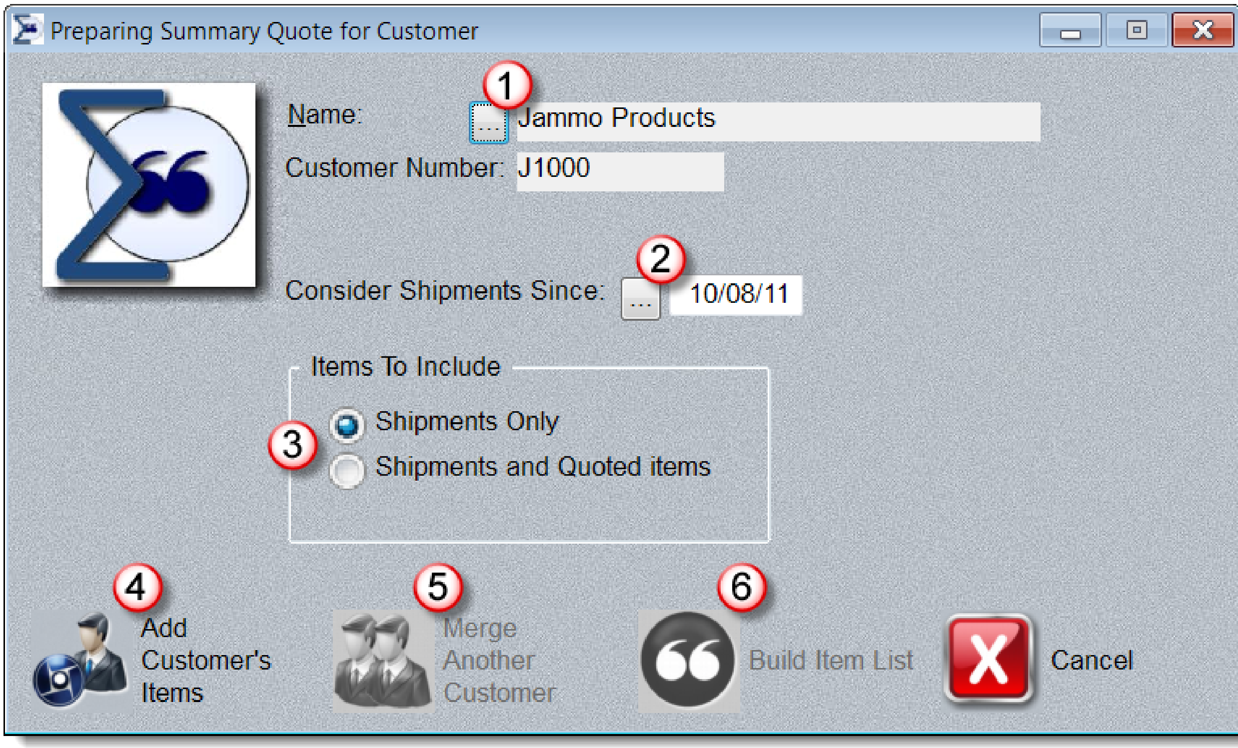
To include items the customer has purchased, you must, of course, also import your sales history periodically.

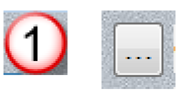
To begin a summary quote, select **Summary Quote For Customer** from the main menu.



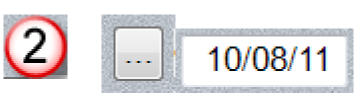
Prep Work

The first thing to do is to identify *who* you are creating the summary quote for, what time period should be considered and which items should be included. Follow the steps in the order shown below.



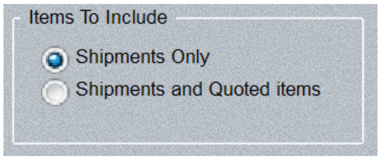


Use this button to select the customer you wish to create the summary quote for. If you are combining the purchases of several customers into one summary quote (see item 4 below), the finished summary quote will be addressed to the customer you select here.



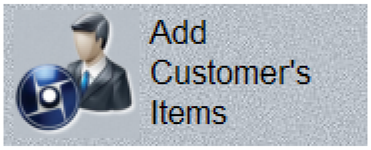
When building the list of items to add to the quote, shipments and quotes issued from the selected date forward will be included. If the customer has not purchased an item during the time range, it will not be included although you will have the option to manually add or delete items later.

3



Choose whether you wish to include *only* items that the customer *purchased* during the selected time period, or also include items that were *quoted* but not been purchased during the selected time period.

4



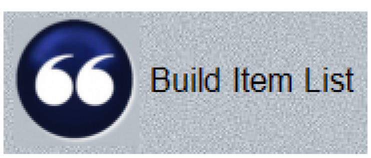
Press this button to build the list of all items to include in the summary quote. You will have the option to add or remove items from the list later. You must do this before you may proceed further.

5

Sometimes, you may wish to include items from an additional customer. Press *this* button to add in another customer's sales or quoted items into the summary quote you are building. <u>This is an optional step</u> and may be repeated as necessary. Remember, the quote will be addressed to the customer you first selected in step one above.

NOTE: This button is not enabled until you have added the first customer's items. This step may be repeated as needed.

6

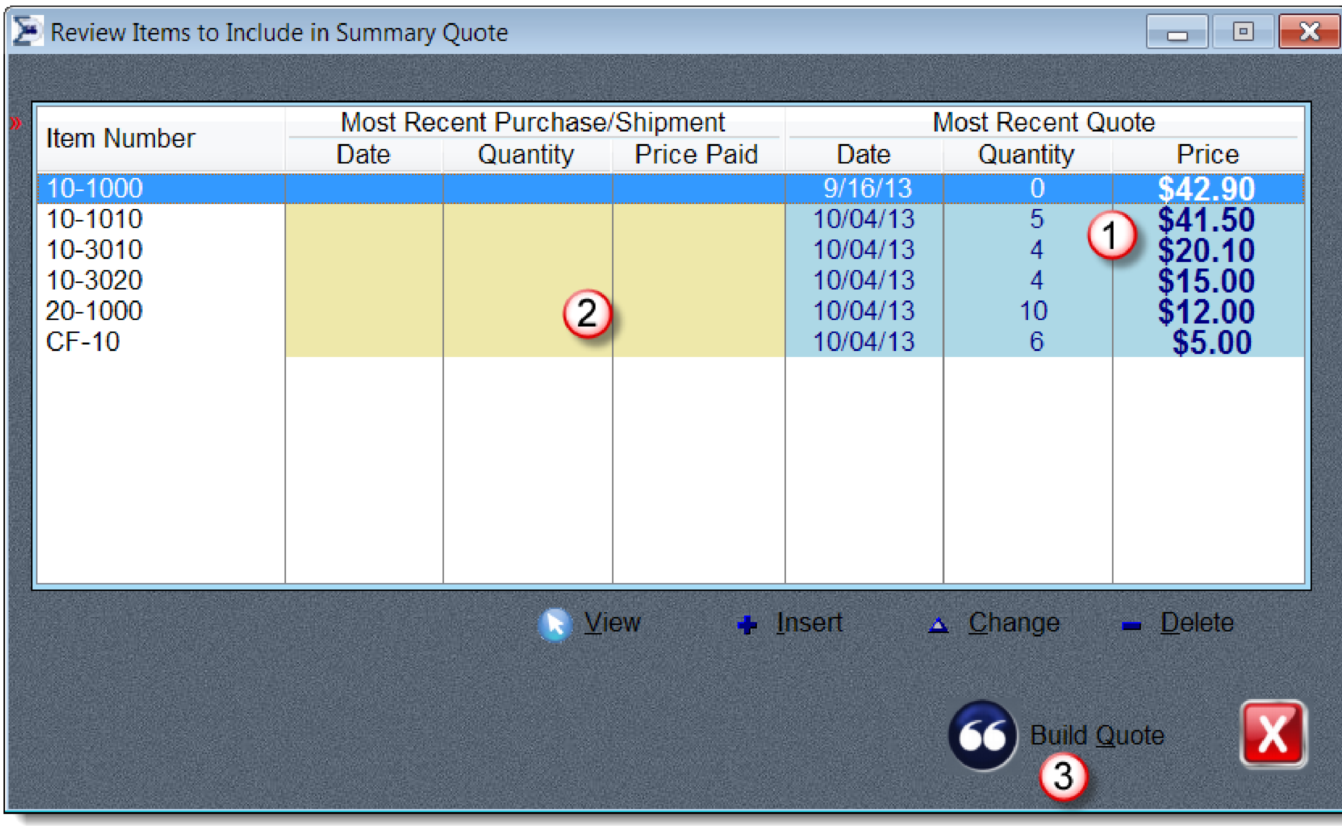


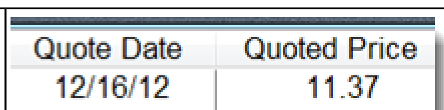
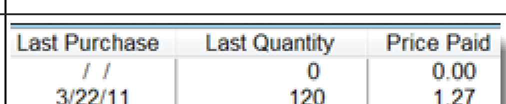
This button actually builds the list for your review. This button is not enabled until you have added the customer's purchased items.

Reviewing Items for Summary Quote

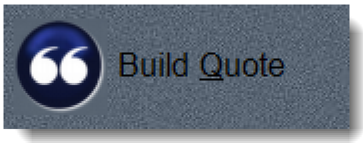
MasterQ goes through your shipment and quote history for each customer you have selected and builds a list of items to include in the summary quote. You may use the insert, change and delete buttons to add or remove items to the listed items as needed. You will be able to change the prices and make additional changes in the next step.

Once you are satisfied with the list of items press the Build Quote button. You will have the ability to re-price all items at that time.



<table>
<tr><td>1</td><td>
Quote Date | Quoted Price
12/16/12 | 11.37</td><td>Items that have been quoted during the time range you've selected will show the quote date and quoted price.</td></tr>
<tr><td>2</td><td>
Last Purchase | Last Quantity | Price Paid
/ / | 0 | 0.00
3/22/11 | 120 | 1.27</td><td>Items that the customer has purchased are listed here.

Note: If you import customer returns as part of your shipment history, the last "purchase" could actually be a return. The 5th and 6th item in the list above are returns and show a</td></tr>
</table>

		negative quantity. Do you charge a re-stocking fee? Then the last "price paid" may be misleading.
3		Press the Build Quote button to copy all of the items in your list into a quote form. You will then be able to adjust pricing and issue a quote. The process of preparing a summary quote from this point on is the same as if you had created a quote in the normal manner.

Sometimes there will be discrepancies between the price you have quoted and the most recent price the customer has actually paid. When building the list, MasterQ will guess, using the sale or quote with the most recent date. But this could be wrong. You have the ability to change the preferred price from this table.

When you are finished, press the Build Quote button and the items/pricing will be inserted into a new quote document. You can make further pricing changes there.

How to Create a Master Price Schedule

One of the features of MasterQ is the ability to lookup pricing from related customers when creating a quote. You can create any number of generic "customers" and assign them as being related to your real customers.

As an example:

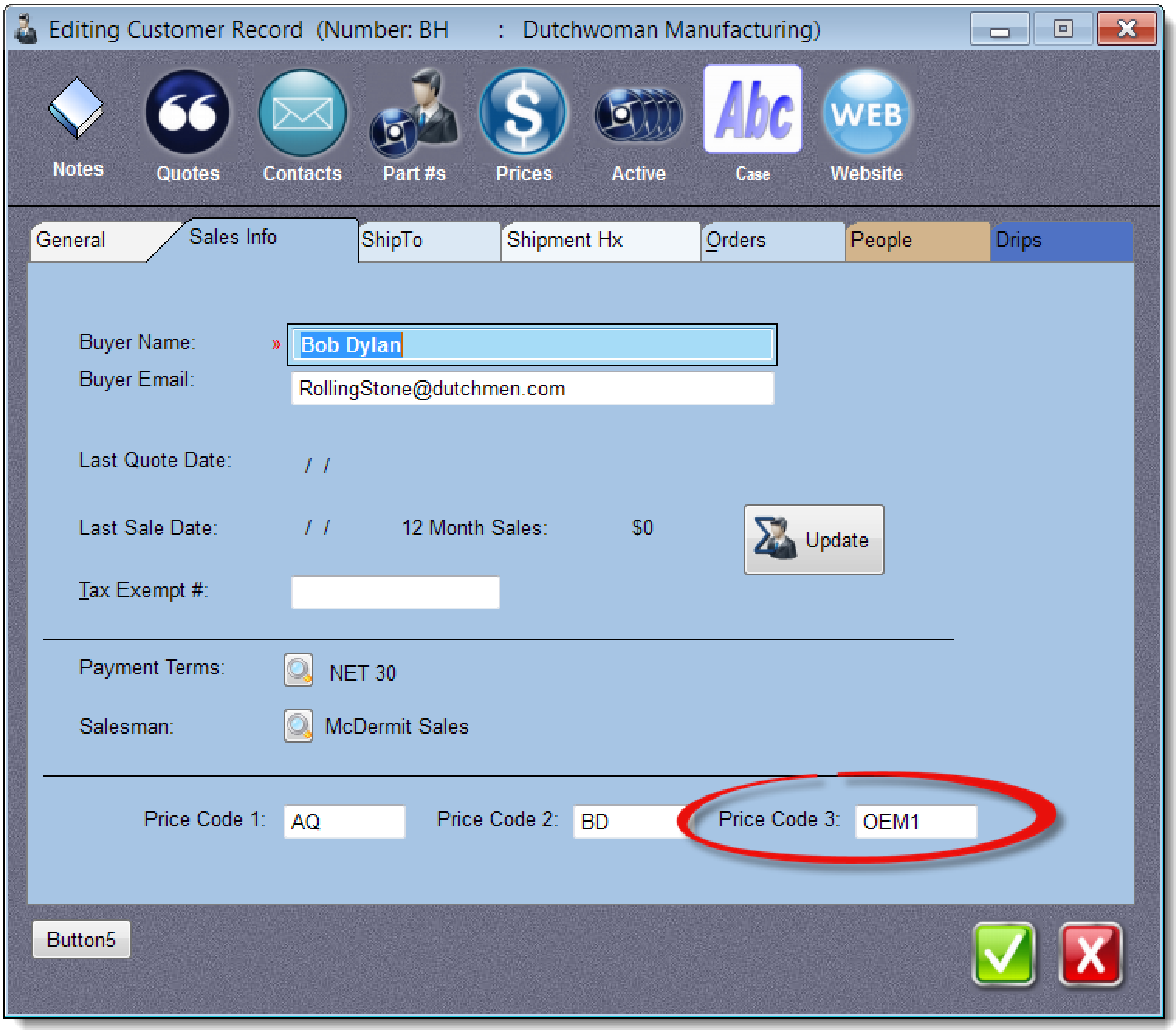
You might create customers with names like OEM-Large, OEM-Mid, and OEM-Small. You would create a quote to each of these "customers" with appropriate pricing for your items. You could expand this list of pseudo customers as needed. You might consider Dealers, Retail, or Jobber as other "customers".

Then when you set up a new *real* customer, you would assign one of these pseudo customers as a "related" company.

When creating a quote for an item that has been quoted to a related company (like one of these pseudo customers, MasterQ would prompt you with the appropriate pricing.

MasterQ-ENT includes the ability to create Summary Quotes. Using this feature speeds up the process of creating large master quotes. Start the process by creating a summary quote your "OEM-Large" customer. Then merge in the sales and quotes that have been issued to additional real customers (who would be in the OEM-Large category). This will effectively build a complete list of all items suitable for OEM-Large accounts. You only need to review and assign pricing.

Don't forget to go to each existing customer who would, for example, be classified as OEM-Large and add the OEM-Large "customer" as a related price code.



Editing Customer Record (Number: BH : Dutchwoman Manufacturing)
Notes
Quotes
Contacts
Part #s
Prices
Active
Case
Website
General
Sales Info
ShipTo
Shipment Hx
Orders
People
Drips
Buyer Name:
Bob Dylan
Buyer Email:
RollingStone@dutchmen.com
Last Quote Date:
/ /
Last Sale Date:
/ /
12 Month Sales:
$0
Update
Tax Exempt #:
Payment Terms:
NET 30
Salesman:
McDermit Sales
Price Code 1:
AQ
Price Code 2:
BD
Price Code 3:
OEM1
Button5

Remember, MasterQ will look for suitable pricing by searching Price Code 1, *then* Price Code 2, *finally* Price Code 3.

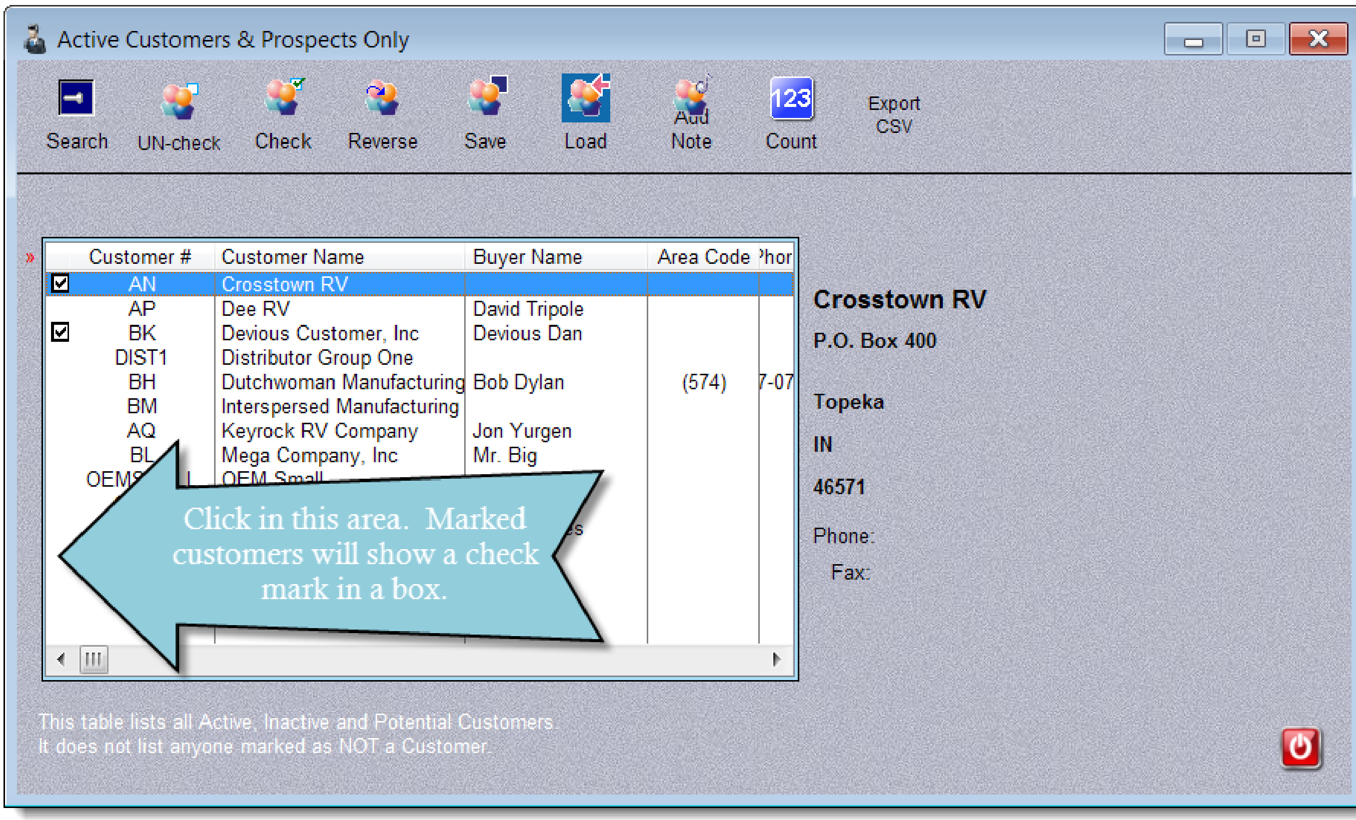
Creating Multiple Notes

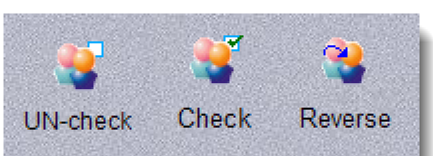
MasterQ-ENT includes a feature that lets you apply identical notes to multiple selected customers or people at one time. All the usual features available to you when creating a regular note are included.

Applying Multiple Customer Notes

This feature allows you to select a group of customers and create an identical note for each one. This feature is available in MasterQ-ENT.

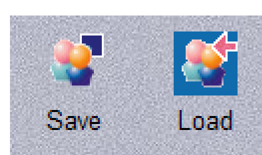
The first step in creating multiple customer notes is to identify which customers you wish to add a note to. This is referred to as "marking" a customer. The most direct way to mark a customer is to click in the customer browse in the far left column by the desired customer's name.

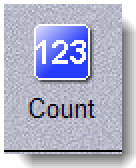




You may un-mark all displayed customers, mark all displayed customers, or swap their marked status using the UN-Check, Check & Reverse buttons. These actions apply only to customers currently displayed. You can filter the customers currently displayed by using the Search button.

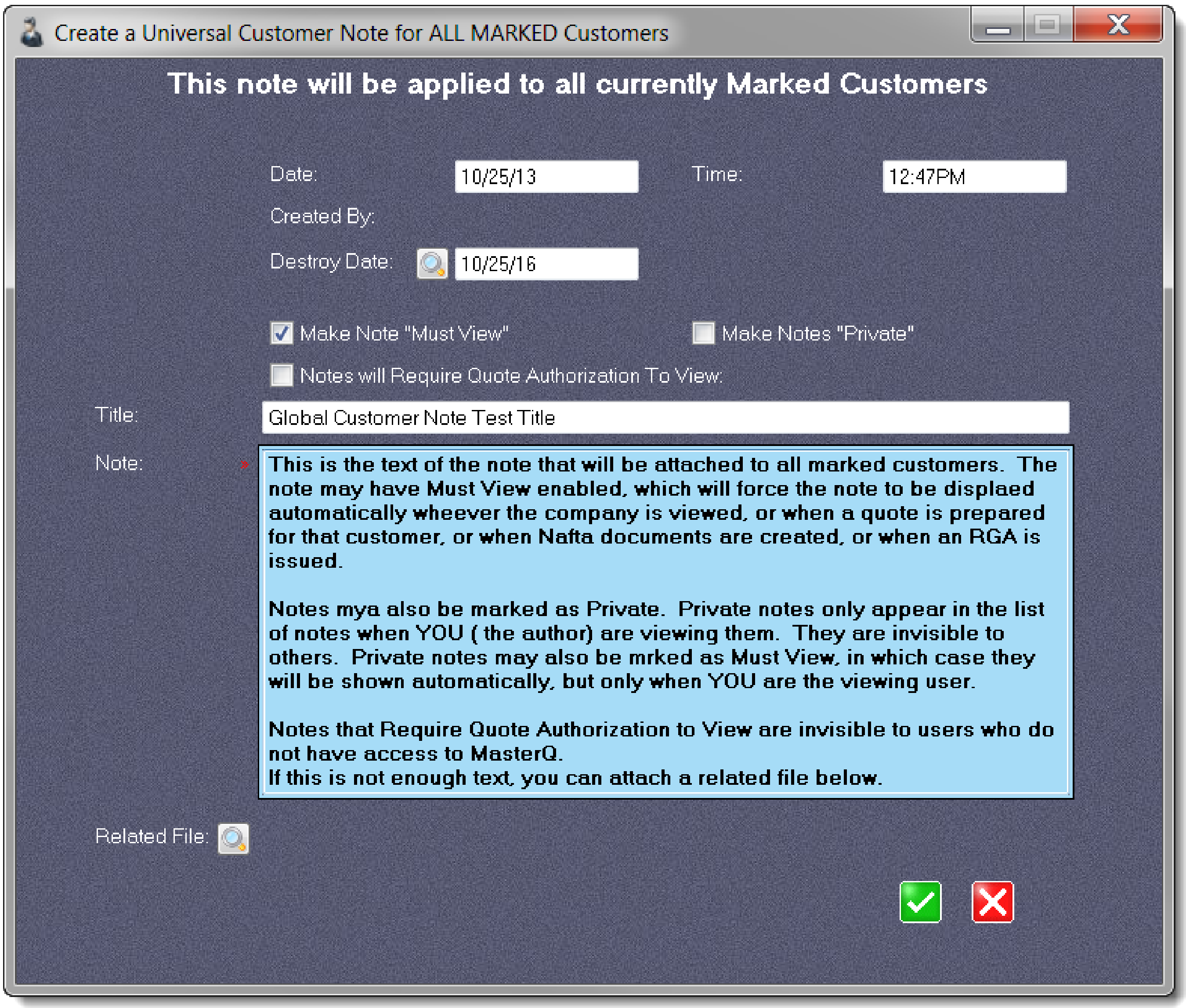
The save and load buttons "remember" your current list of marked customers. When they are *loaded*, you are given the option of marking, unmarking, or flipping the current status of the customers being loaded.



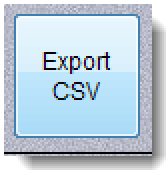


The count button gives a quick count of the number of customers you have currently marked and the total number of customers in your database.

Pressing the Add Note button will present you with a note form with then typical note entries.



Pressing the OK button creates an identical note for each marked person.

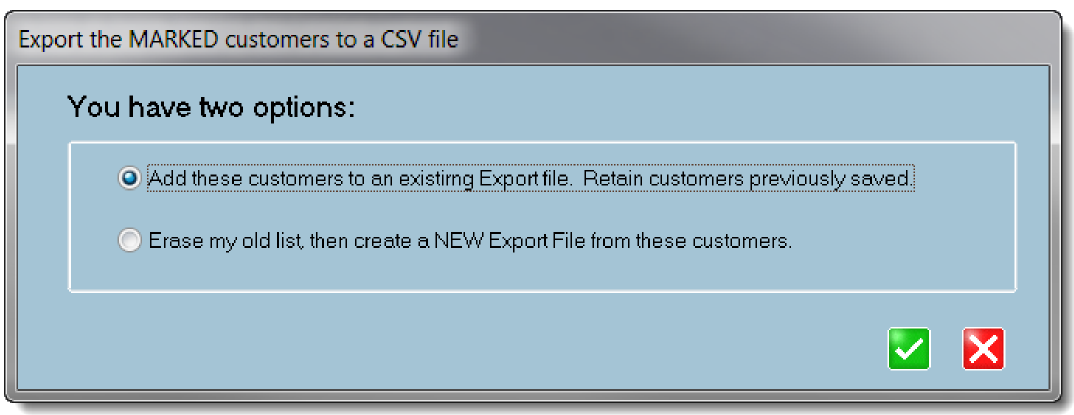


The Export CSV button saves the currently marked customers in a CSV (comma separated values) file of your choosing. This can be useful for creating mail merge applications.

The following information is exported:

- Company Name
- Address (line 1)
- Address (line 2)
- City
- State
- Zip Code
- Area Code
- Phone number

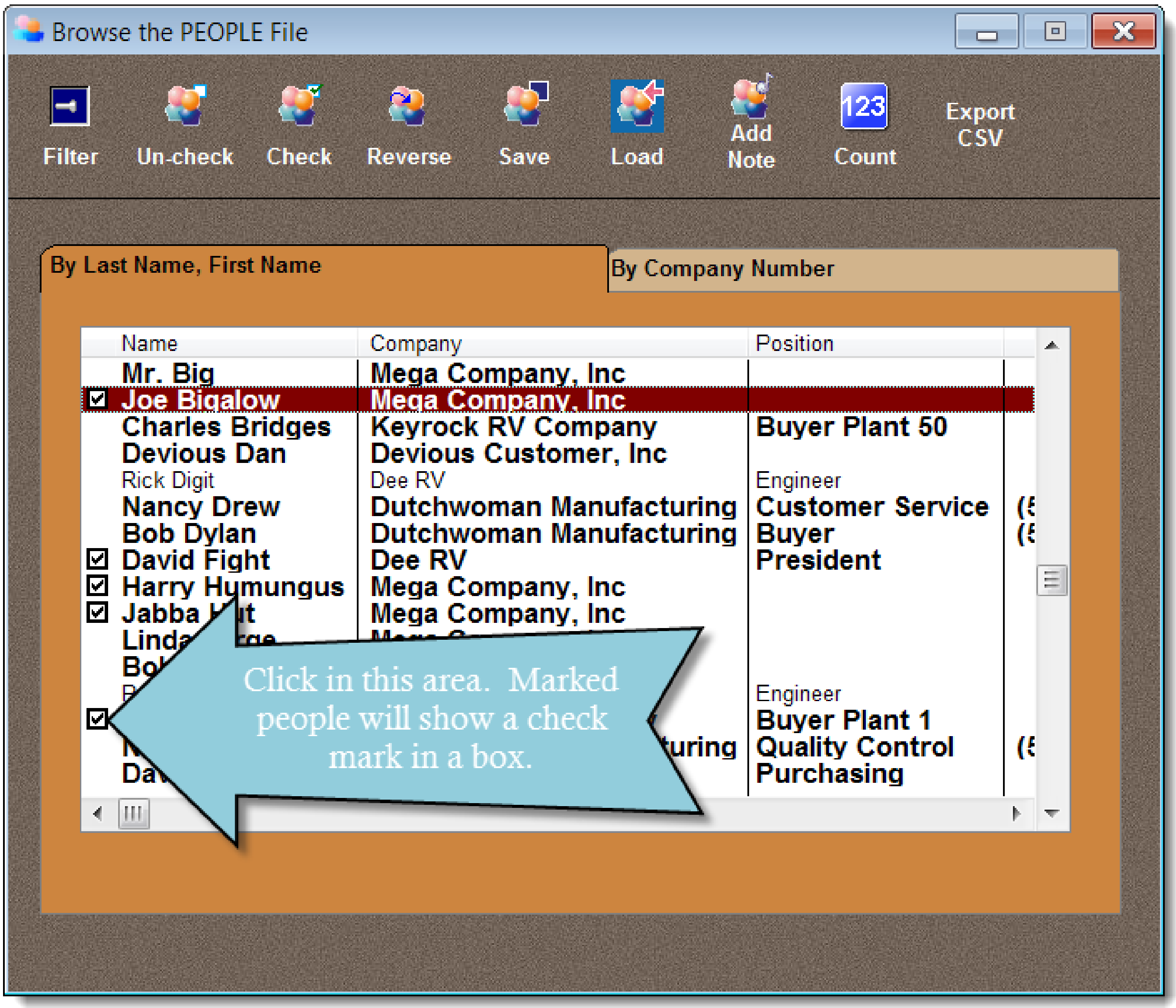
You have the option of adding the marked names to the current file or replacing the current file with these marked names.

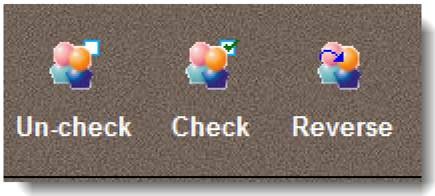


Applying Multiple People Notes

This feature allows you to select a group of people and create an identical note for each one. This feature is available in MasterQ-ENT.

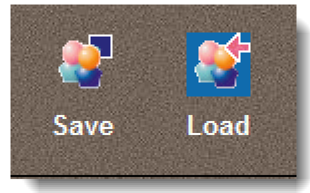
The first step in creating multiple people notes is to identify which contacts you wish to add a note to. This is referred to as "marking" a contact. The most direct way to mark a contact is to click in the people browse in the far left column by the desired person's name.



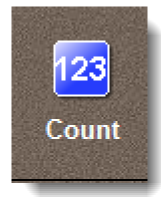


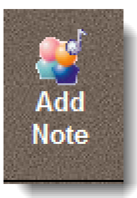
You may un-mark all displayed people, mark all displayed people, or swap their marked status using the UN-Check, Check & Reverse buttons. These actions apply only to people currently displayed. You can filter the people currently displayed by using the Search button.

The save and load buttons "remember" your current list of marked customers. When they are *loaded*, you are given the option of marking, unmarking, or flipping the current status of the customers being loaded.

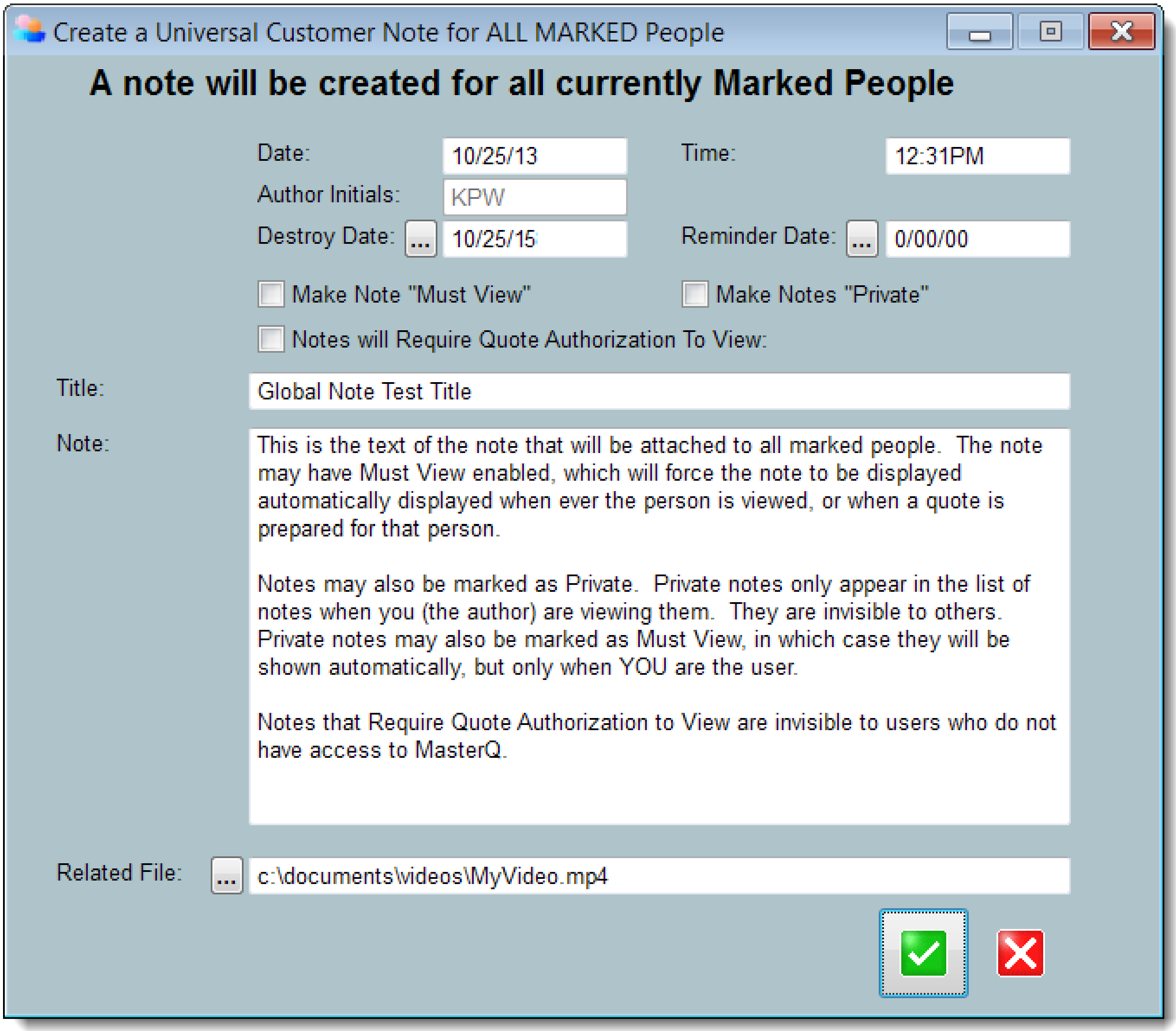


The count button gives a quick count of the number of people you have currently marked and the total number of people in your database.





Pressing the Add Note button will present you with a note form with then typical note entries.

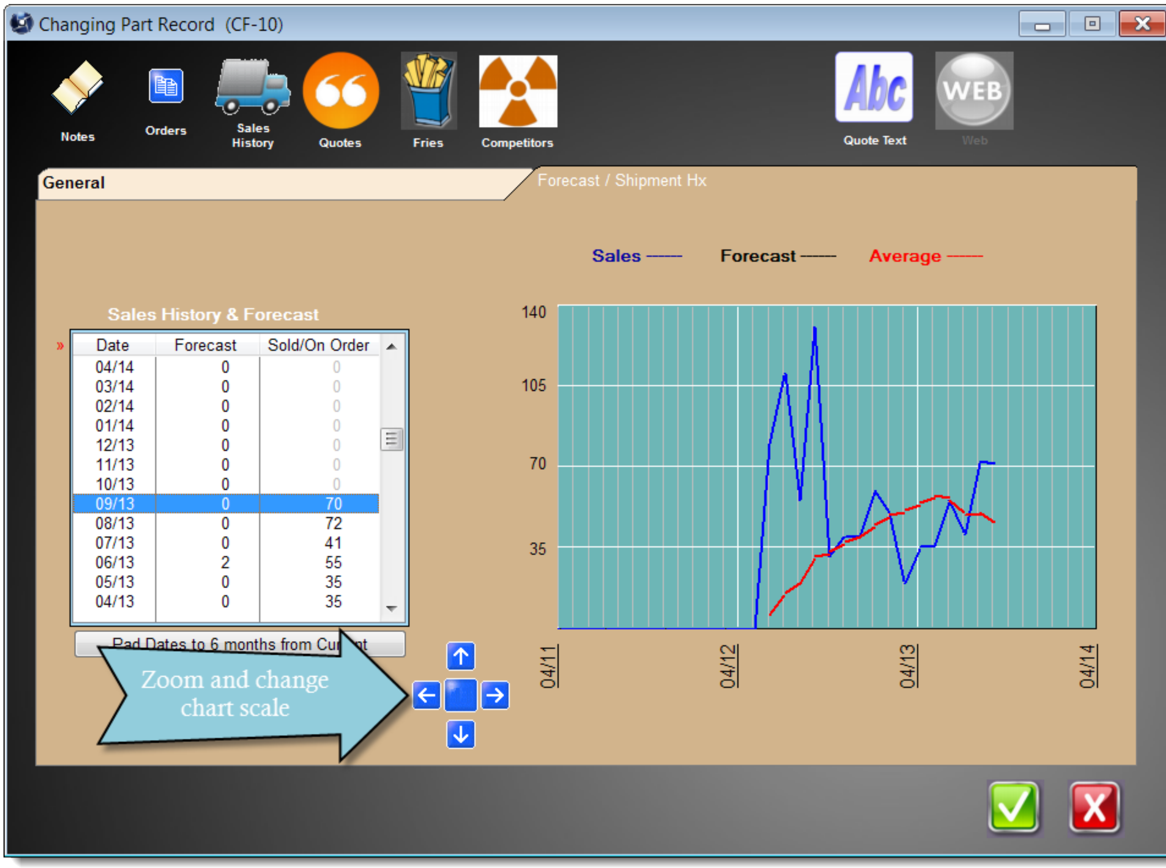


Pressing the OK button creates an identical note for each marked person.

Understand Sales History

MasterQ-PRO and MasterQ-ENT have the ability to import your sales history from a CSV file. See how to import your sales history here.

You can easily spot sales trends by clicking on the **Forecast / Shipment Hx** tab on the part form.



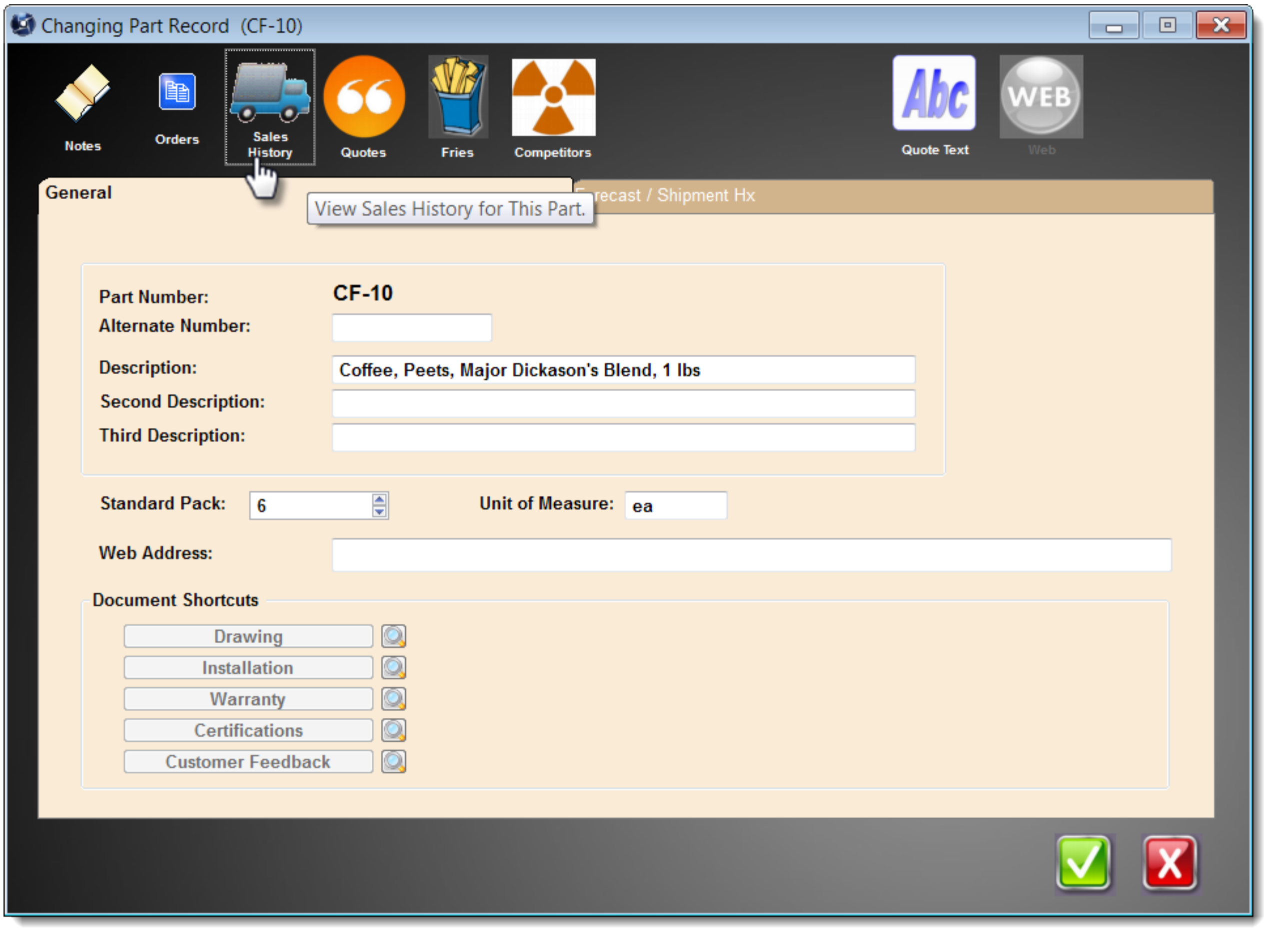
When this tab is first opened, the sales history graph displays roughly 3 years of sales history if available. You can zoom between one year and five years by using the blue zoom buttons.

Other Agenda Development programs use this same form and if you have the BucketManager or Targets program, you will also see the *forecast* sales quantities.

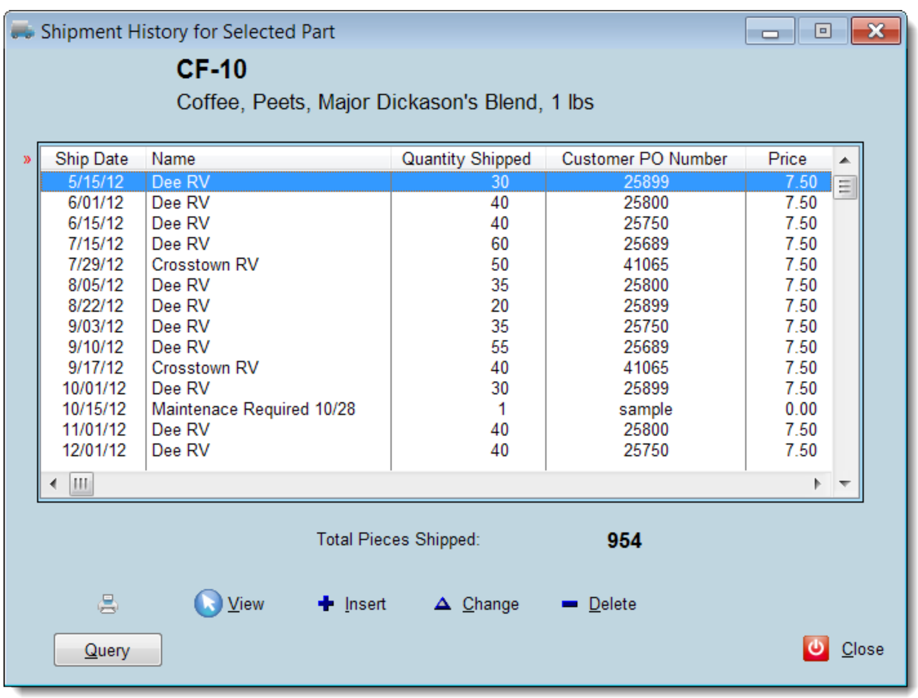
Each point on the Average (red) line represents the average of the previous 12 months. This smoothes out month to month random variation. Averaging 12 months also tends to eliminate seasonal variations, since each point plotted includes your busiest month as well as your slowest month.

Viewing Sales to All Customers

If you need more detail, you can view a table listing all shipments of a given part to all customers by clicking on the Sales History button located on the Item form.



This will display the table below. The most recent shipments are at the bottom of the list.



Periodic Maintenance

Occasionally you may choose to do the following steps to insure top performance of MasterQ

- If you did not choose to automatically recalculate each customer's sales dollars each time the customer record is opened, you should periodically have MasterQ do this for *all* customers.

- Delete Old Quotes - As a general rule, we discourage deleting old quotes. However, if your system seems slower than you would like you can easily remove old quotes. Click here for details:

- Compress Shipment History -

- Back up files - Always back up your files. Always. This applies to all programs, not just MasterQ. Not only should daily back ups be part of your routine, we recommend retaining several days of back ups in case problems are not recognized right away. We also recommend keeping some back ups at an off-site location in case of fire or theft. Did we mention Always?

Compress Shipment History

Importing shipment histories is a feature of the MasterQPRO version of the program. For a complete comparison of the features, click here.

When you import shipments into MasterQ information about the order is saved. This information includes the item purchased, the customer, the quantity shipped, the customer's purchase order number and the price paid.

When you compress the history, one entry is made for each item purchased by each customer in the target month. One entry for each part/customer is created showing the total number of pieces the customer purchased during the month, the date (this would be the first of the target month), and the average price paid. All of the individual shipments are then removed.

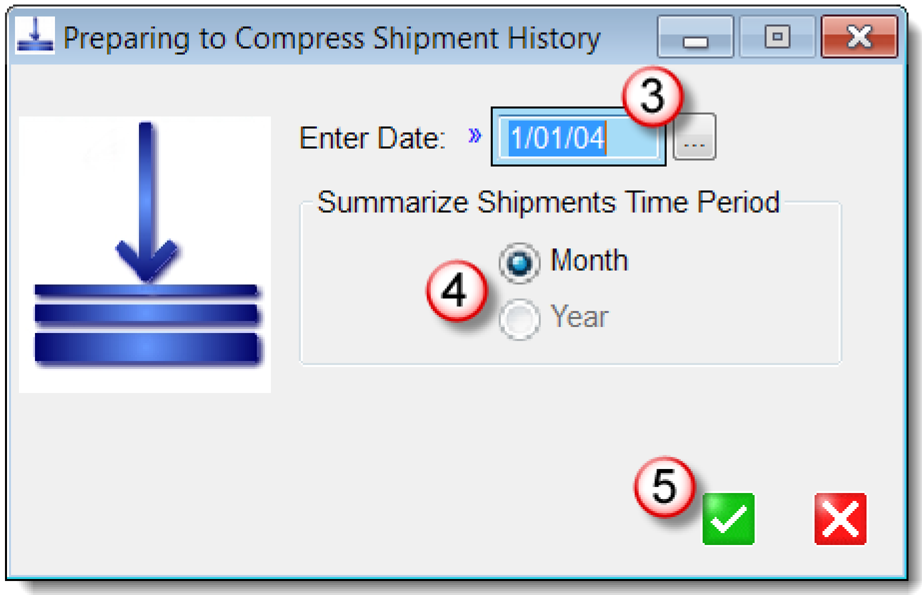
You may choose to optionally import customer shipment records into MasterQ. While this can be very beneficial, when the history becomes very large it can slow your program down a bit. When you compress the shipment history, numerous shipments of one part to one customer in one month are summarized into *one* record. Depending on how many times each customer orders each part each month, this could have a significant impact on the size of the file and speed up loading when you are browsing history records.

How important is it to do this? This is not something you need to do frequently. We've noticed a slowdown in systems holding 10 years of shipment history covering 700+ different part numbers shipped to various customers. The impact you see will depend on many factors including the number of parts, the number of orders, the speed of your computer & the speed of your network.

Is there a trade-off to consider? When you compress the shipment history, you lose the ability to inspect each individual shipment record including the specific price paid and the customer's PO number. But does that really matter for shipments that are 3 years old? It's your call. If you don't see a slow down, you don't need to do this.

Who can compress the shipment history? In order to compress the shipment history, you must be a super user or MasterQ manager. These abilities are set in the user record.

Why would the specific price paid change when the shipment history is compressed? When the calculations are done, all quantities shipped during each month are totaled. The "price" shown in the monthly summary is the total pieces shipped divided by the total amount invoiced. This final "price" is therefore affected by customer returns, no charge samples, etc.



How to compress the Shipment History

1. Back up your data files (*.tps). In particular, the file SHIPHX.TPS will be modified and should be backed up in case of failure.

2. From the main menu, select **TOOLS | COMPRESS SHIPMENT HISTORY**

3. Enter any date in the month or year that you wish to compress in the field labeled Enter Date.

4. Select either Month or Year for the Summarize Shipments Time Period entry. (for yearly summaries, one entry for each month will be created for every month in the year you have specified.)

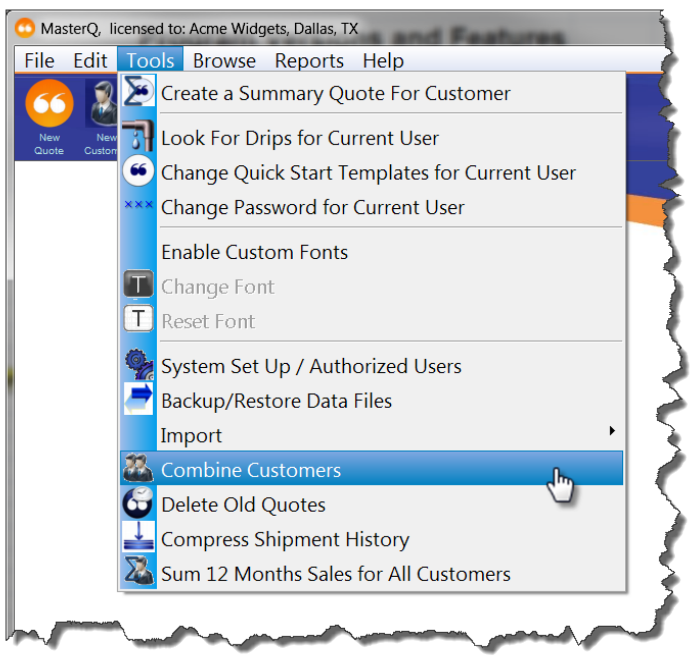
5. Press the OK button. Be patient. Depending on a number of factors, this process can take a few minutes for a monthly summary to an hour (approximately) for a yearly summary.

Combining Customers

Occasionally, customers join together. One customer may be purchased by another. You may have accidentally created two customer records. Or if you use prospect (PR) customer numbers, the prospect may turn into a real customer.

For what ever reason, combining customers is very easy, but it is a one way process and cannot be un-done. So proceed with a bit of caution.

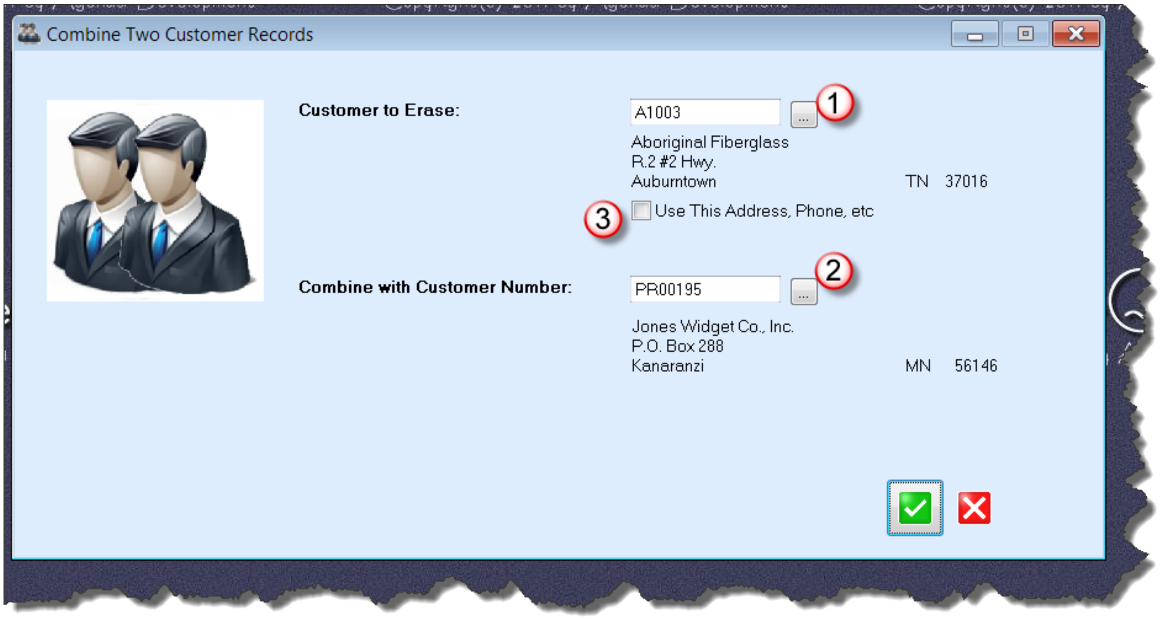
To limit accidents, only users who are set up as Super Users, MasterQ managers, or who have the Edit Customers attribute set on their user record are able to perform this command. If your user record does not have one of these attributes set, this command will not be available to you.



Start by selecting the Combine Customers command from the main menu.

Next, select the customer number that will be erased by pressing 1.

The customer that will remain is selected by pressing 2. The name, address, phone numbers, etc will be from the customer you have selected in 2. If you wish to use the information from the first customer, check the Use This Address, Phone, etc check box 3.



All quotes, prices, shipment histories, contacts and notes will be merged into the customer number you have specified in .

Deleting Old Quotes

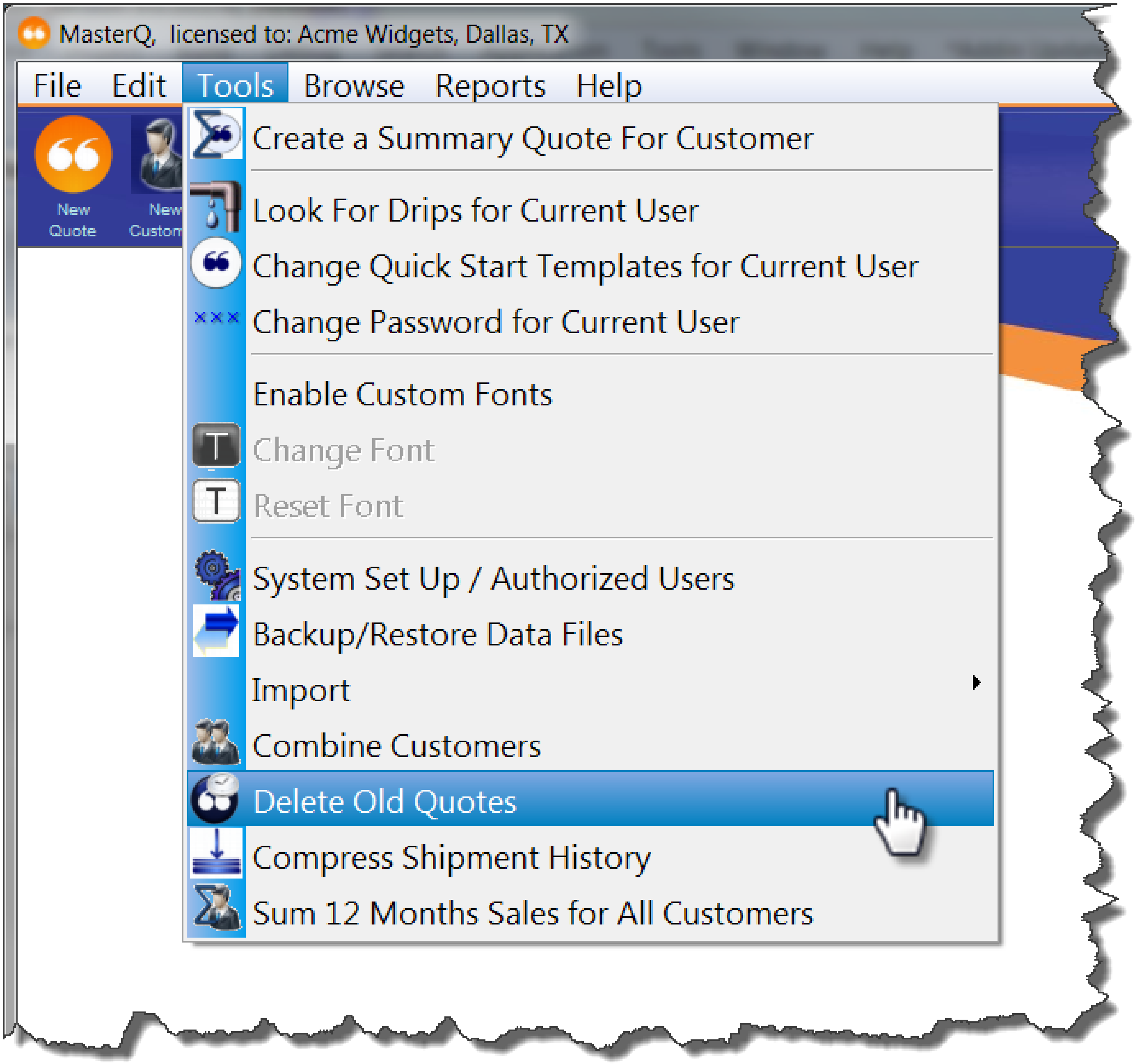
At some point you may decide to remove old outdated quotes from the system. When the browsing quotes takes longer than you would like, consider this option.

If and when you choose to perform this maintenance is up to you and depends on your computer and network speed. Systems with several thousand quotes are not a problem.

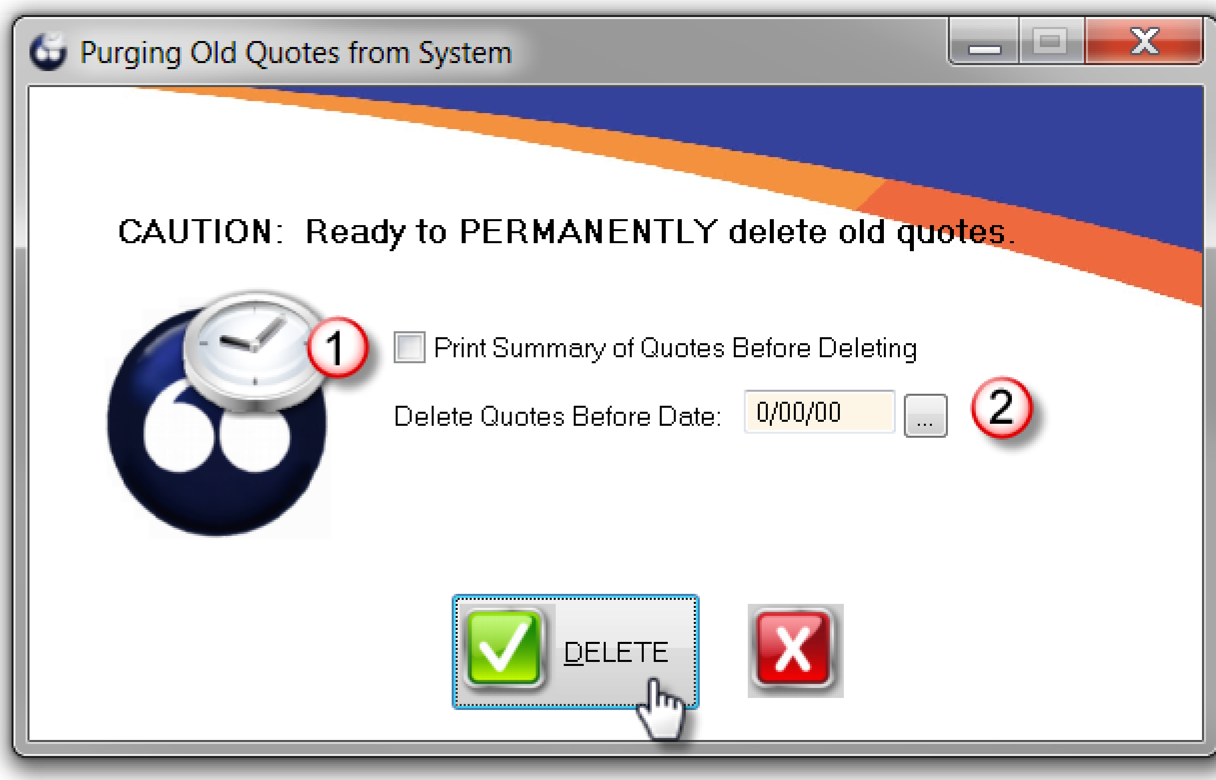
NOTE: Even though you may delete the quote from MasterQ, the actual quote document remains in the Correspondence folder under the customer number. Also, the pricing will still be seen in the customer's record and will appear for review when creating a new quote for this customer.

Only users with the Super User or MasterQ Manager attribute are able to use this command. For more information on setting these attributes click here.

To begin, select **TOOLS|DELETE OLD QUOTES** from the main menu.



Next, select the date range to delete and confirm.



1 Print Summary of Quotes Before Deleting. If checked, will allow you to print a summary of the quotes you are about to remove. Consider printing this to a PDF document.

2 Enter the cut off date. Quotes before this date will be removed.

Importing Shipment History

Importing shipment histories is a feature of the MasterQ-PRO and MasterQ-ENT versions of the program. For a complete comparison of the features, click here.

Importing customer's shipment history is an optional step that offers many advantages to users of Agenda Development software. Once imported, you can:

- **When creating a quote you may be automatically advised *if* a customer is already purchasing the item being quoted and what price they paid most recently.** (Even if you do not import shipment histories, MasterQ will advise you if a customer has been previously quoted the item you are working on.)

- **Be automatically advised if a <u>related</u> customer is already purchasing the item being quoted and what price *they* paid most recently.** (Even if you do not import shipment histories, MasterQ will advise you if a related customer has been previously quoted the item you are working on.)

- View graphs of your sales to better understand demand and trends.

- Quickly examine a customers entire ordering history including part numbers, quantities, prices paid, ship dates and customer PO numbers

- Filter the customer shipment history by date, part number, PO number, price paid, etc.

- Send the customer's shipment history to Microsoft Excel easily including any filtering or sorting you have applied

- Displays customer's 12 month *total sales dollars* on the customer form

Preliminary Set Up Options

Importing shipment histories is a feature of the MasterQ-PRO and MasterQ-ENT versions of the program. For a complete comparison of the features, click here.

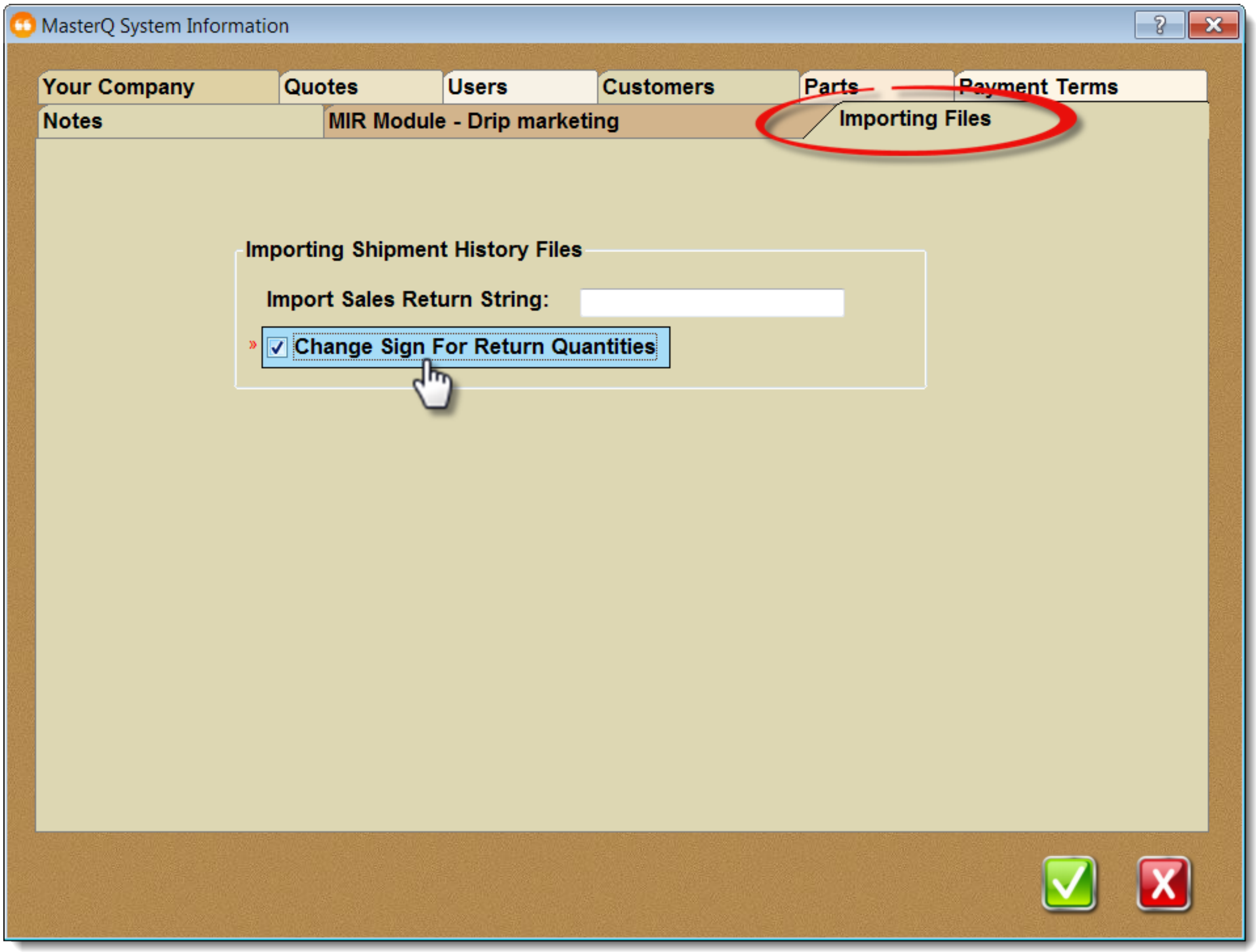
This step tells MasterQ how to handle certain things when shipment histories are imported. You only need to do this one time. Your user account must be a manager or super user to access the system record where these changes are made.

When importing shipment histories, the program you export the histories from may behave in some interesting ways. This section allows you to accommodate those eccentricities.

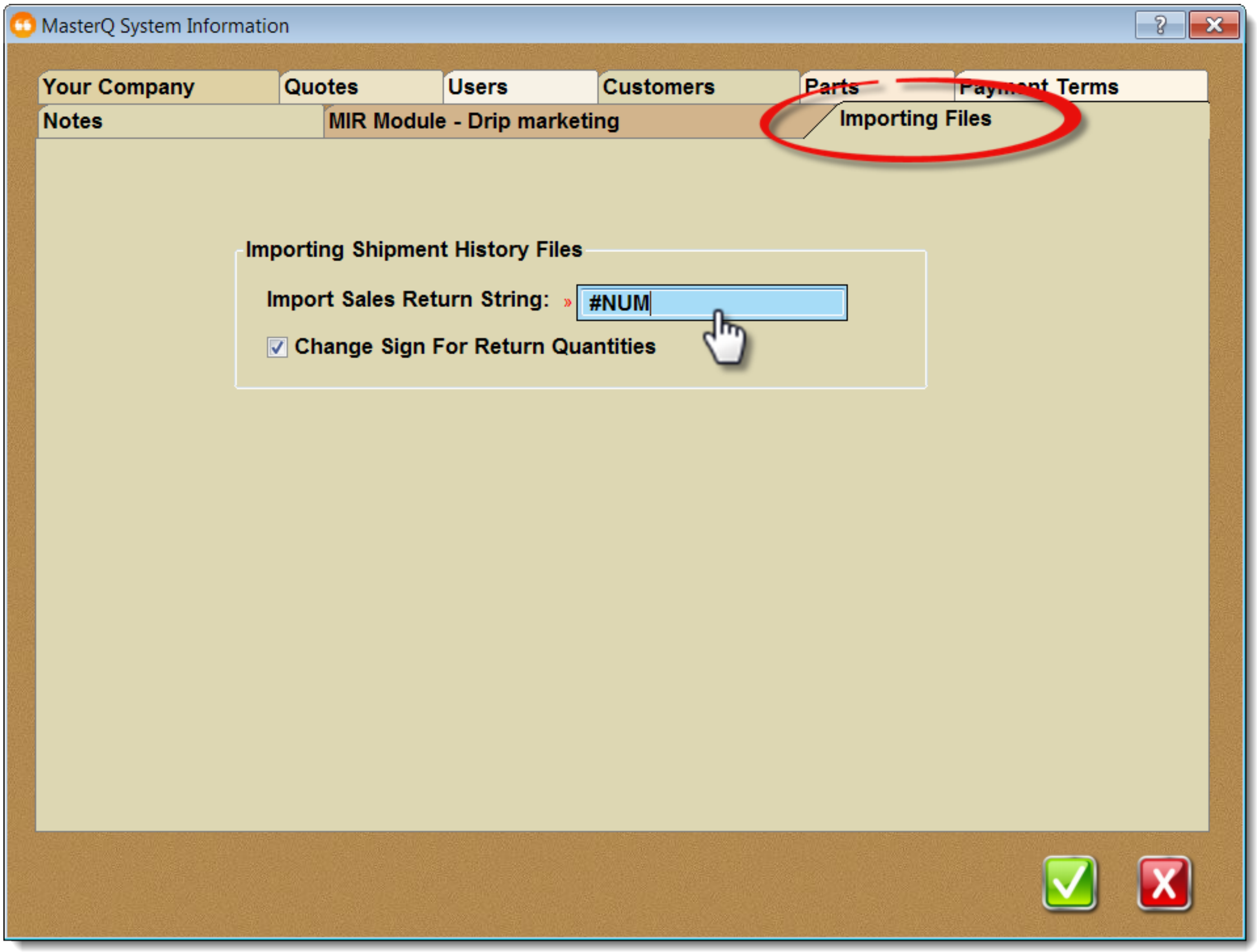
1. If your exported shipment histories **do not include customer returns**, you can ignore the rest of this section.

2. If your exported shipment histories **do include customer returns, but show the quantities as negative numbers**, both of the options discussed below should be blank, or un-checked.

3. If the exported shipment histories **do include customer returns, but the numbers are positive for returns** as well as regular shipments, check the Change Sign For Return Quantities box in your system record. Use the **TOOLS|SYSTEM SET UP** command from the main menu and select the Importing Files Tab. Check the box that says Change Sign For Return Quantities.



4. If the exported shipment histories do include customer returns and the quantities for returns are shown as positive numbers just like regular shipments, you will need some way to indicate the shipment is a return and not an outbound shipment. Your export file will need to place some entry in the last field (often this is shown as the return date). This could be a date or the word RETURN or what ever you wish. Any entry in this last field will indicate the shipment is a return.
   If life were only so simple.
   Some systems, however, insist on putting *something* in this field even if the shipment is *not* a return.
   Microsoft's Great Plains software is one of these. Great Plains includes returns, shows them with positive quantities and indicates returns with a date. But GP also puts an entry in this field for regular out-bound shipments. It uses **#NUM** for return dates if none exist!
   If your system puts an entry of some type into the return date field for *regular shipments* (something other than nothing) you can tell MasterQ to treat *that* entry as if it were blank.



This only needs to be done once, thankfully. If you have any questions, please email support@agendadevelopment.com and attach the shipment history file you are trying to import. Make sure the sample file contains at least one regular outbound shipment as well as at least one customer return record. We will review and can quickly advise how you should set these options.

Steps Required to Import Shipment History

Using your other program, export a CSV file containing the following fields in the order listed below:

- Date in a format of MM/DD/YYYY
- Customer number
- Part number
- Quantity purchased (negative numbers allowed for returns)
- Price paid
- Customer PO number
- Shipper Number
- optional text - *any* entry here indicates that this is a <u>return</u>

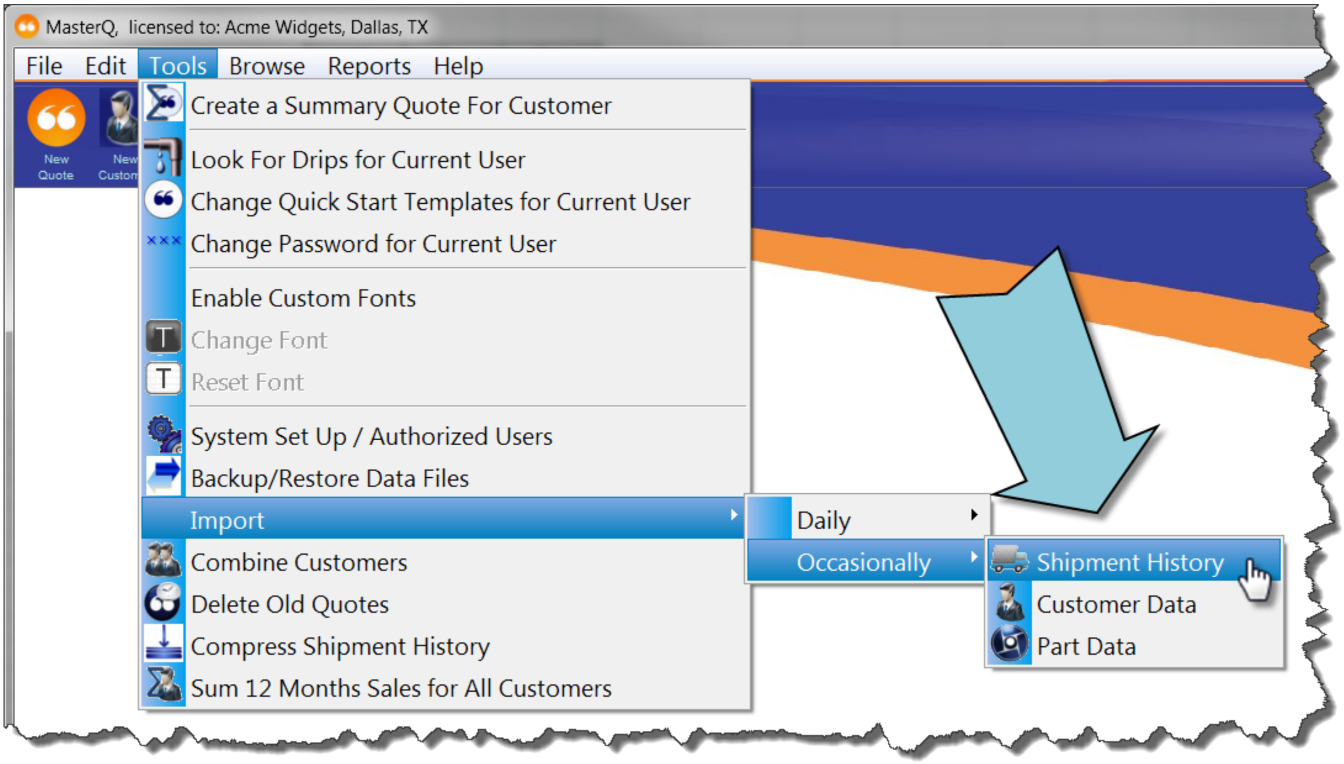
The date, the part number and the quantity are required in order for this information to have any value. The customer number is highly desirable, of course. Other fields are optional.

If you omit one of the fields, you must include a space for it in your CSV file. For example, if you could not include customer PO's in your export file, the data in your CSV file might look like this:

```
"10/24/2013" , "GA" , "20-1000" , 12 ,   19.75 ,   , SH0054,
"10/25/2013" , "AB" , "10-1020" , 150,    1.50 ,   , SH0055,
"10/25/2013" , "KP" , "15-363"   , 600,  10.05 ,   , SH0056,
"10/25/2013" , "KZ" , "20-1000" , 1    ,  19.75 ,   , SH0056,  RETURN
```

Note the commas between price and the shipper numbers.

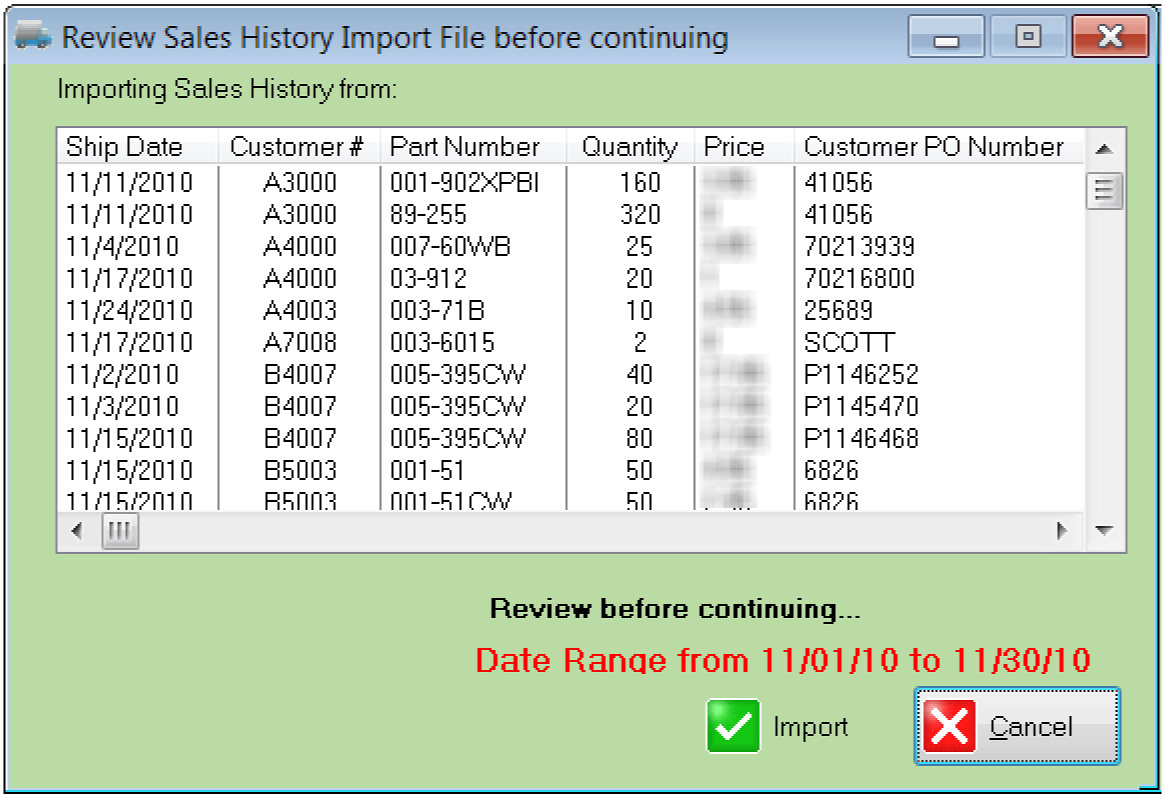
Start the import process



Select the file containing the shipment history to import

Review contents for proper format using the review window

Double check that the entries in each column match the values you expect. Better to notice an error here before you import a months worth of shipments.



Click the import button.

MasterQ will:

- identify the date range of the shipment history you are importing
- clear out any existing history for that time period
- build your history file for each customer
- build the monthly summary for each part

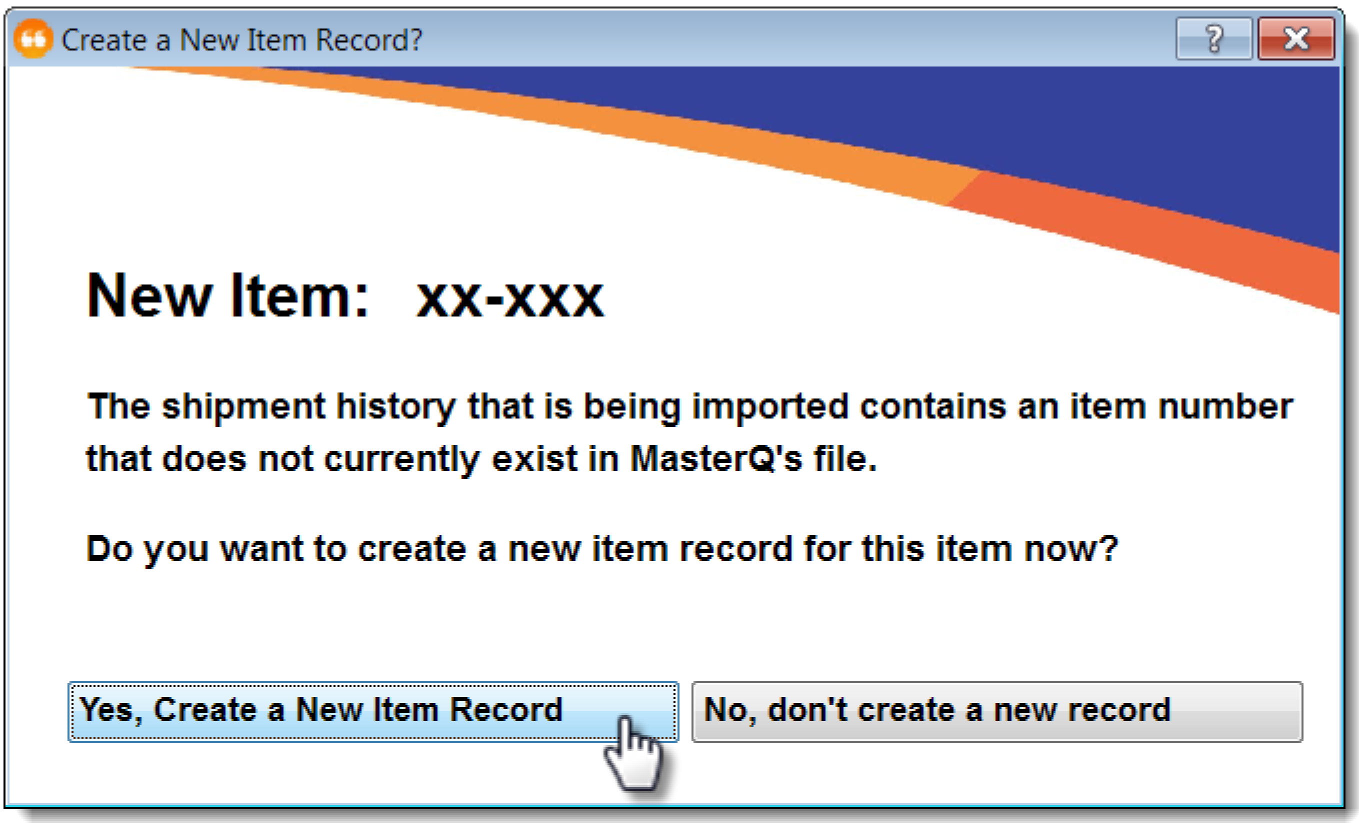
Handling Unknown Items & Customers

Importing shipment histories is a feature of the MasterQ-PRO and MasterQ-ENT versions of the program. For a complete comparison of the features, click here.

The shipment history that you import obviously contains information about customers and items they have purchased. As each item in the shipment history file is read in, the related customer and item record are retrieved. But what happens if the customer or the item in the history does not exist in MasterQ?

Finding a Previously Unknown Item

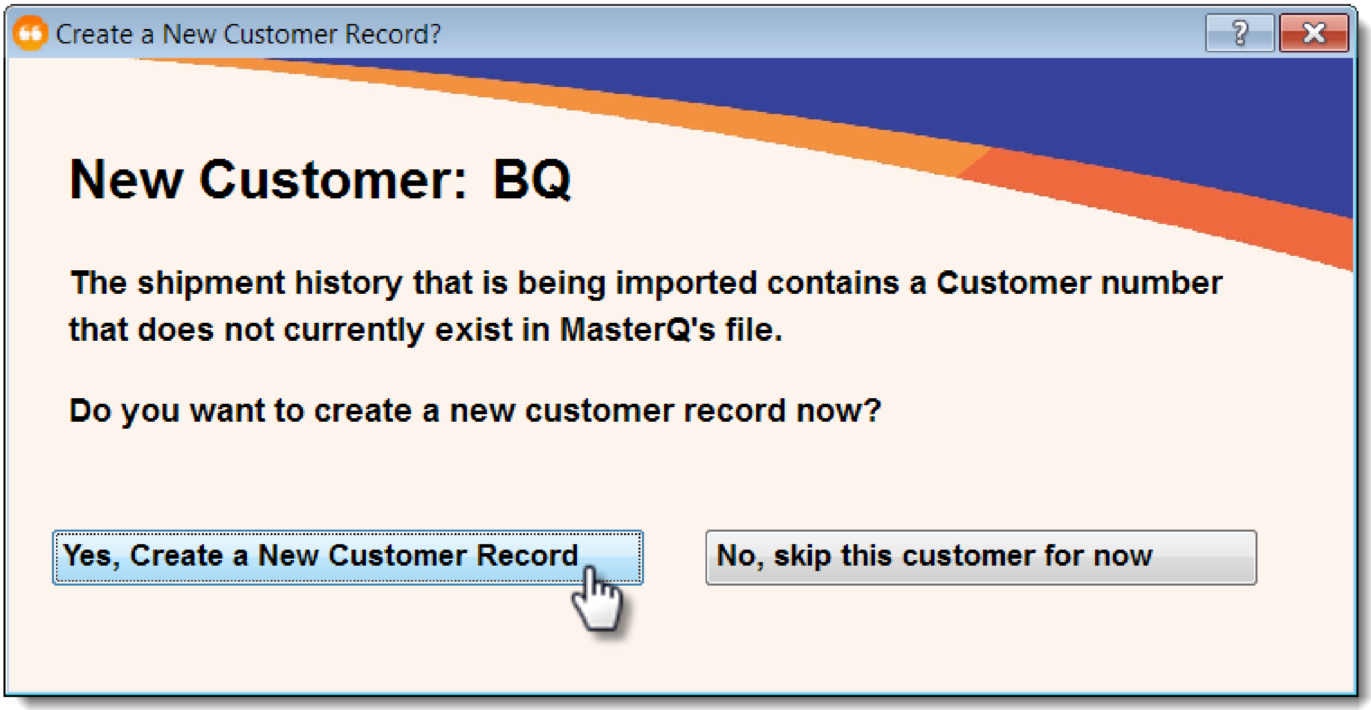
When a new part is listed in the shipment history file, you will be asked to confirm if a new item record should be created. Sometimes these "new" items might be a simple data entry error in the other system. If the new item is legitimate, press the appropriate button and the part number will be set up.



This will create a new part number (XX-XXX, in this example) and will give it a description of **Maintenance Required - added when importing shipment history**. You will need to edit these records periodically.

Finding a Previously Unknown Customer

Entries in the shipment history also include a customer number. When a new customer number is found in the shipment history file, you will be asked to confirm if a new record should be created for them. Sometimes these "new" customers might be a simple data entry error in the other system. If the new customer is legitimate, press the appropriate button and the customer record will be set up.



This will create a new customer record (BQ, in this example) and will give them a name of **Maintenance Required** along with the current date. You will need to edit these records periodically.

Importing Inventories

The ability to import inventories is a feature of MasterQ-PRO and MasterQ-ENT.

Importing part inventories is an optional step that offers many advantages to users of Agenda Development software. Once imported, you can:

- **See the total inventory on an item while creating a quote.**

- If you also import customer orders (a unique feature to MasterQ-ENT and/or Targets, our MRP / scheduling program), you can see the *available* inventory of an item while creating a quote.

What is Required?

1. You need to have another program that currently holds this information.

2. The other program needs to have the ability to export this data in a comma delimited value file (CSV) or into a Microsoft Excel spreadsheet. The fields in this file must be PARTNUMBER, INVENTORY.

3. Your part numbers used in your *other* program must be the same part numbers you use in MasterQ

4. Some programs add field descriptions in the first line of the file when they export data. We recommend avoiding this if possible. If your exported data *does* include this descriptive line you have the option of skipping the first line during the import process.

The contents of a typical part inventory import data file might look like this:

071-102-5N,0.00
071-102-5T, 0.00
071-102-6,994.00
071-102-6N, 1340.00
071-103,"1,500"

Negative numbers are allowed.

The fields must be in the proper order, however, they do not need to be sorted in numerical or alphabetical order.

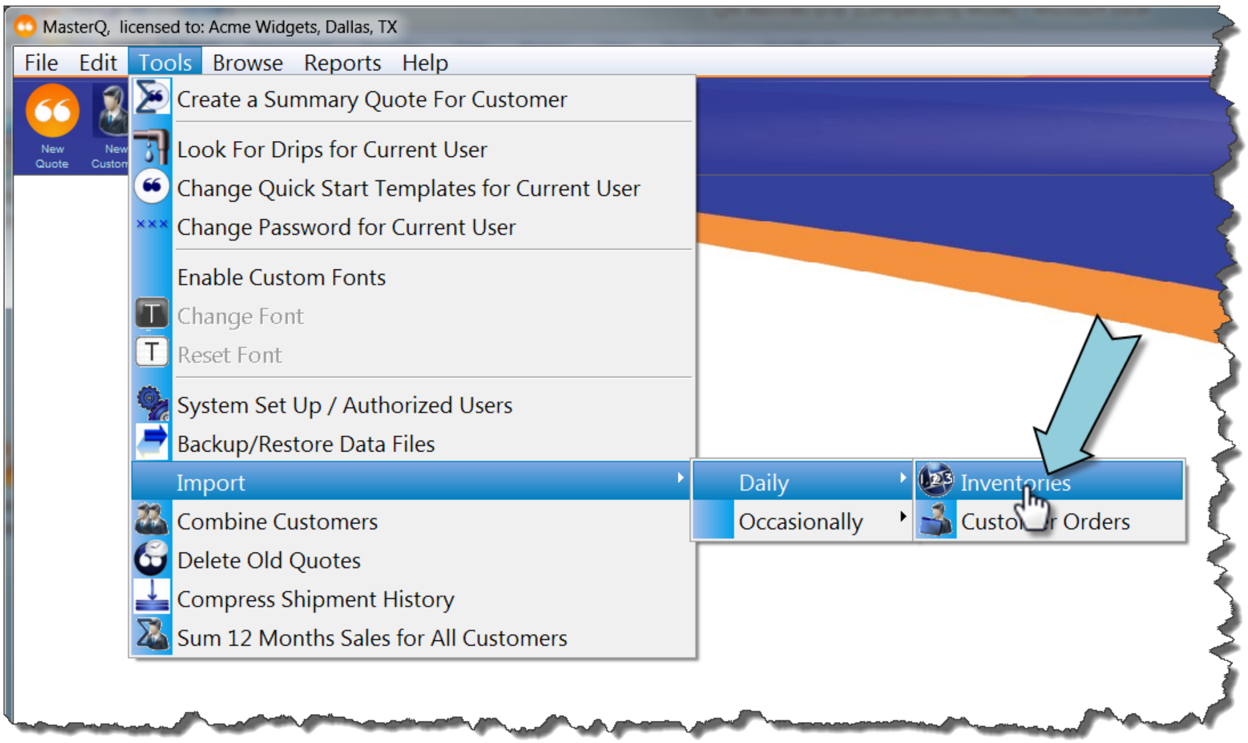
NOTE: If you do not currently use another program for maintaining inventories contact Agenda Development for options.

Using your *other* program, export a CSV file containing the following fields in the order listed below:

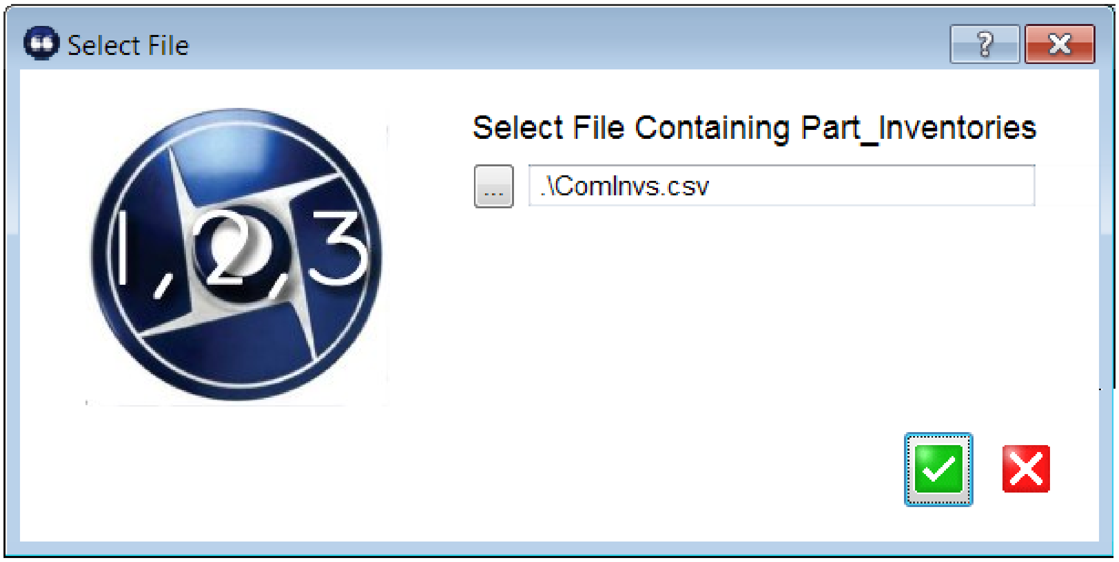
- Part number
- Inventory quantity

Start the Inventory Import Process

Select **Tools|Import|Daily|Inventories** from the main menu.

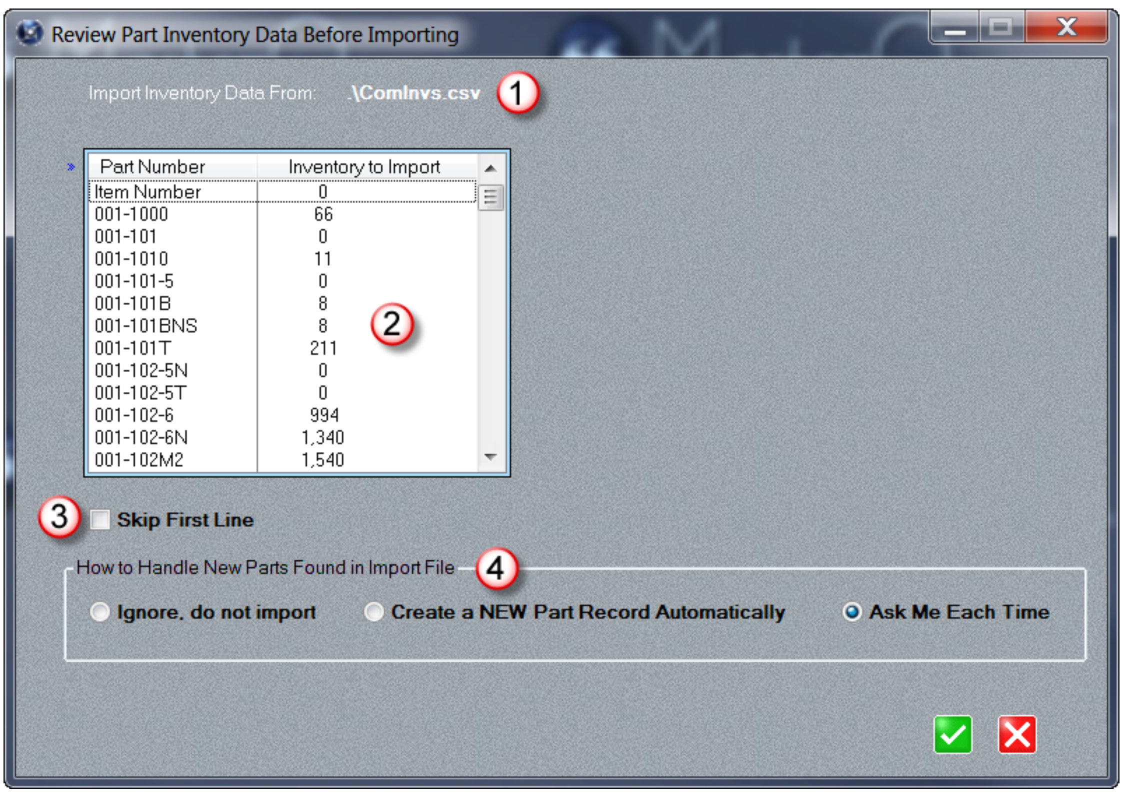


Select the file containing the shipment history to import.
MasterQ will remember the name and location of the file previously used for importing:



Review contents for proper format

Accidentally importing the wrong file can cause real havoc in your database. Always review the import file to confirm that it contains the data you are expecting.



1 Review the filename you are importing from

2 Review the contents of the file. You only need to confirm that the part number and inventories appear in the correct column. You do not need to review every item in the list.

3

If the first line of the file contains a description (like the one in the picture above) check the Skip First Line box to avoid creating a new part number of "Part Number"

4

Choose how to handle New part numbers found during the import process.

- **IGNORE** will skip over new parts
- **CREATE** will make a new part record with a description of "Maintenance Required"
- **ASK** will stop the import process and ask you what to do with each new part.

Begin the import process

MasterQ will:

- replace the current inventory with the quantity contained in the import file
- create new part numbers according to your instructions (see 4 above) if a part & inventory in the import file does not currently exist in MasterQ's database.
- zero the inventory quantity allocated for current customer orders
- If the average weekly use has been set for the part, determine the weeks inventory on hand and update the part record.
- If the cost for an item has been set, calculate the dollar value of the inventory and update the part record.
- Count the number of negative inventories and save for future analysis
- Sum the dollar value of all inventory items and save for future analysis

Importing Customer Orders

When customer orders are imported, the part inventory will show not only the total inventory, but the available inventory.

Importing Customer Orders is a part of the BucketManager software and is done when the MRP is regenerated. For more information, click here.

This procedure has not been implemented as a stand alone command in MasterQ.

Importing Part Data

If part information is kept in another program, it may be helpful to import data periodically to keep both systems in synch.

Additionally, new part records may be created automatically by MasterQ when importing inventories or customer orders. When these records are created automatically, MasterQ gives them the description of "Maintenance Required". You can edit them individually, but you may find it easier to let the import process give you a head start.

Always back up your files before importing files.

Mistakes happen. Better to be safe than sorry.
You can back up your files using the Windows explorer program or use MasterQ's built in back up procedure.

More information about back up procedures is available here.

What is Required?

The file format required is called CSV which stands for comma separated values. Sometimes this format is also called ASCII. It is a very common format that many programs are able to handle. (Microsoft Excel is able to easily export information in this format also. If your current software can export to Excel, you can copy it from Excel to a CSV file.)

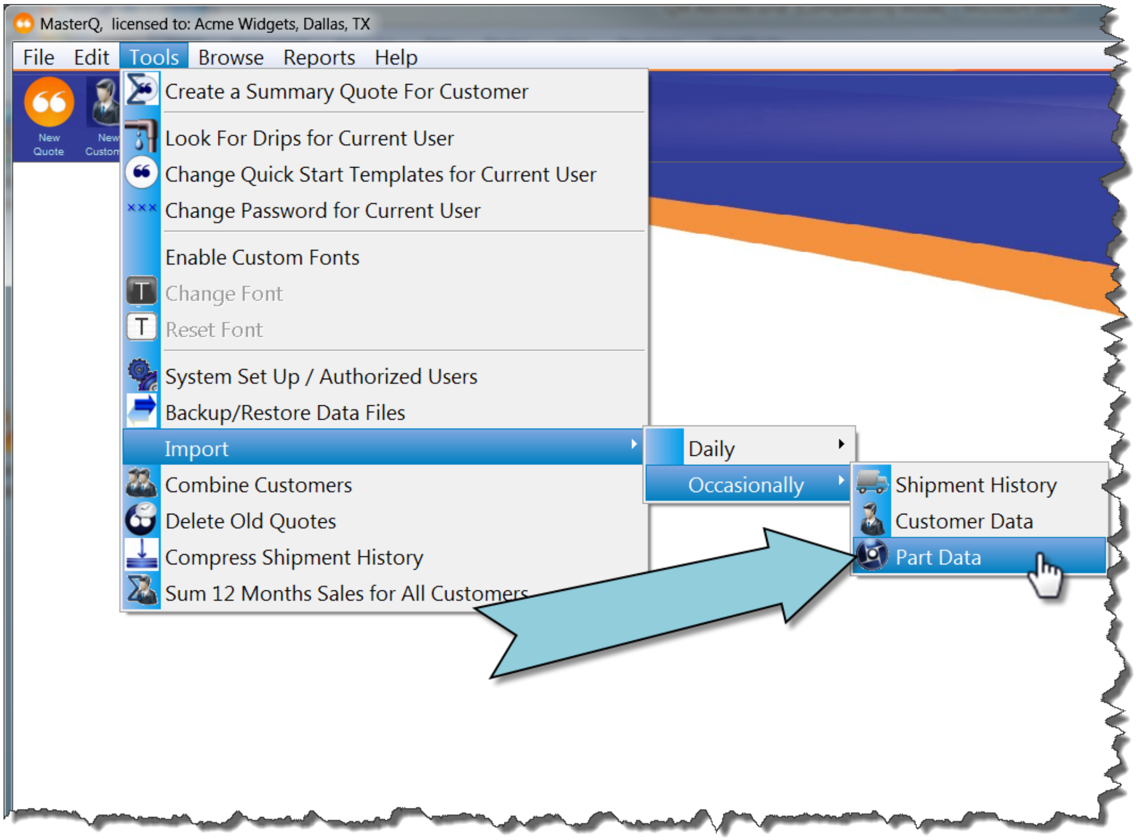
The file should contain the unique part number followed by a comma, and then the description. A typical CSV file might look like this:

```
001-111,"Widget, Blue"
001-112,"Widget, Green"
001-113,"Widget, Purple"
```

As the file is processed, MasterQ will check to see if that file exists in your parts database. You can specify *what* MasterQ should do with parts it finds in your data file already.

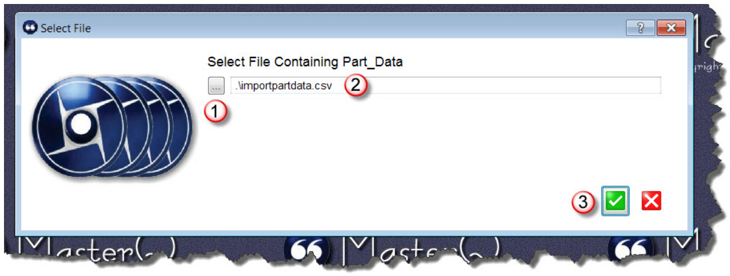
Steps Required

After you have created your CSV file with the part information to import, Select **TOOLS-IMPORT-OCCASIONALLY-PART DATA** from the main menu.



MasterQ, licensed to: Acme Widgets, Dallas, TX
File
Edit
Tools
Browse
Reports
Help
New Quote
New Custom
Create a Summary Quote For Customer
Look For Drips for Current User
Change Quick Start Templates for Current User
Change Password for Current User
Enable Custom Fonts
Change Font
Reset Font
System Set Up / Authorized Users
Backup/Restore Data Files
Import
Combine Customers
Delete Old Quotes
Compress Shipment History
Sum 12 Months Sales for All Customers
Daily
Occasionally
Shipment History
Customer Data
Part Data

Next, you will need to tell MasterQ which file contains your data.


Select File
Select File Containing Part_Data
.\importpartdata.csv
1
2
3

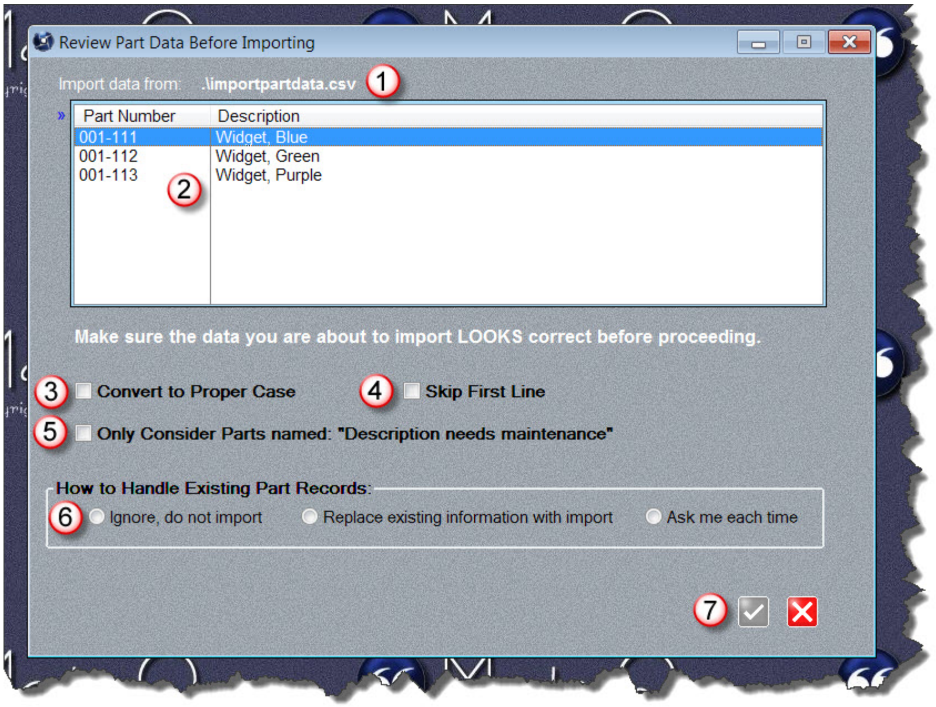
1. Use the look up button to browse files and click on the file you wish to import from. Or...

2. Type in the path and filename of your import file. Then...

3. Press the OK button to continue.

MasterQ will remember the file you choose. If you import this information again in the future, the file you used will be filled in automatically. If you want to use the same file, all you will need to do is press the OK button.

There are several options to consider before you import the part information.


Review Part Data Before Importing
Import data from: .\importpartdata.csv
1
Part Number
Description
001-111
Widget, Blue
001-112
Widget, Green
001-113
Widget, Purple
2
Make sure the data you are about to import LOOKS correct before proceeding.
3
Convert to Proper Case
4
Skip First Line
5
Only Consider Parts named: "Description needs maintenance"
How to Handle Existing Part Records:
6
Ignore, do not import
Replace existing information with import
Ask me each time
7

The file you have selected to import from is displayed here. This is helpful if the file does not seem to contain what you expected.

2 Import data list shows the contents of the file. You should examine the displayed information to confirm that the part numbers look correct and that they appear in the first

column. The description should appear in the second column if you have exported the file correctly.

3 Check Convert To Proper Case if your imported information is in all capitals and you wish to automatically change it to a mix of upper and lower case characters. For example, WHEEL would become Wheel.

4 Some programs automatically include a first line in the export file they create that lists the column heading. This might appear as "Part Number" or something similar. Check Skip First Line and MasterQ will ignore the first line.

5 Certain Agenda Development programs may automatically create part records for you under certain conditions. For example, BucketManager will automatically create

a part number if you import a customer order for that part number. Part records may

also be created automatically if you import inventories from another system, but the part

with inventory does not exist in MasterQ. In these cases, the description will be set as

"Description needs maintenance". Check this option to *only* update part records with a current description of "Description needs maintenance".

6 When the import process finds a part that already exists in your parts database a choice must be made. Check "**Ignore, do not import**" to skip existing parts. This

is helpful if you have modified the description from it's original content. For example,

many accounting systems may use names that are fine for internal use, but not marketing

optimized. You don't want to lose improvements you have made. Check "Replace existing

information with import" if you wish to use the descriptions from your import file even if

you have made changes to them in MasterQ. Checking "Ask me each time" will show you

changes and ask you to select which you wish to use. Parts with descriptions that match the import file will be ignored to save you time.

7 Once you have made the required decisions, the OK button will be enabled and you may proceed.

After the import process, a confirmation window will show the number of new parts added, modified, skipped and any errors encountered.

The file format required is called CSV which stands for comma separated values. Sometimes this format is also called ASCII. It is a very common format that many programs are able to handle. (Microsoft Excel is able to easily export information in this format also. If your current software can export to Excel, you can copy it from Excel to a CSV file.)

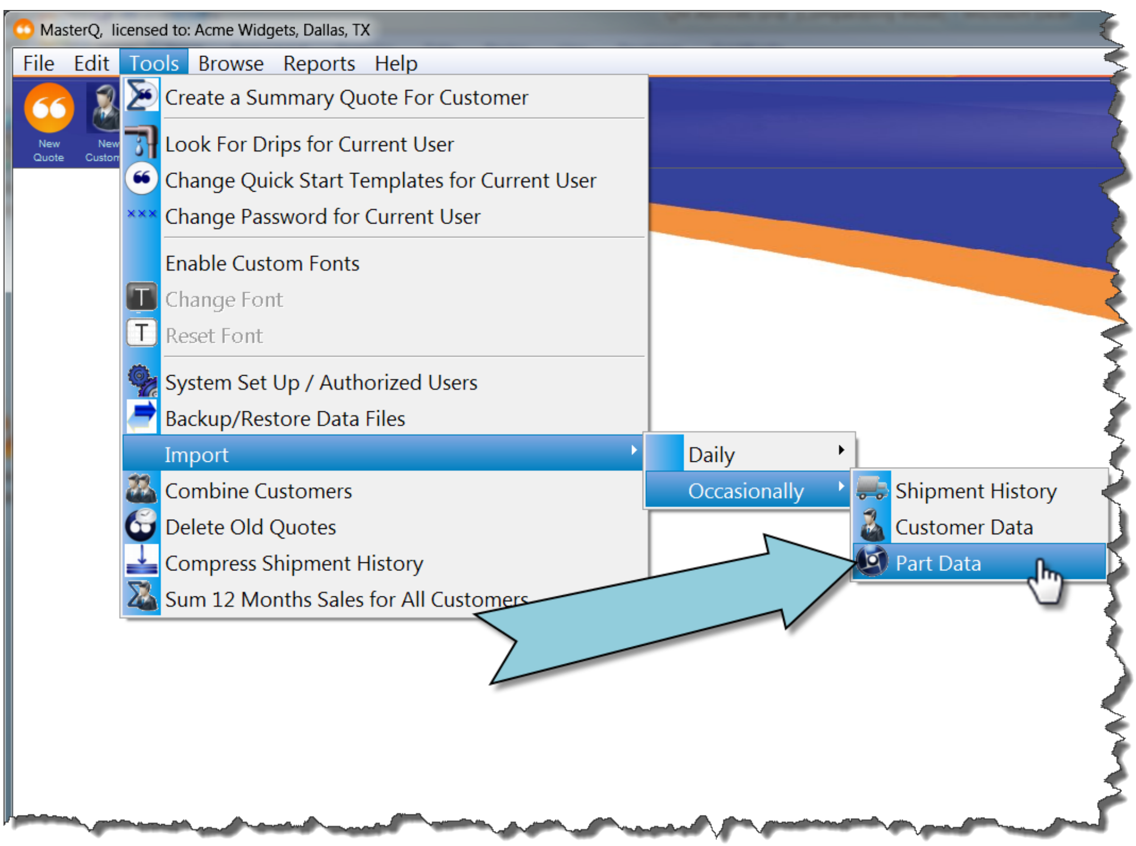
The file should contain the unique part number followed by a comma, and then the description. A typical CSV file might look like this:

001-111,"Widget, Blue"
001-112,"Widget, Green"
001-113,"Widget, Purple"

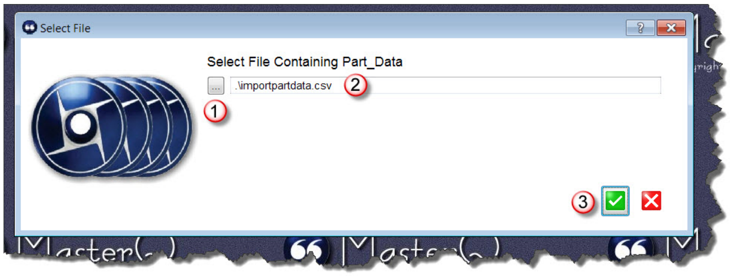
As the file is processed, MasterQ will check to see if that file exists in your parts database. You can specify *what* MasterQ should do with parts it finds in your data file already.

Steps Required

After you have created your CSV file with the part information to import, Select **TOOLS-IMPORT-OCCASIONALLY-PART DATA** from the main menu.



Next, you will need to tell MasterQ which file contains your data.


Select File
Select File Containing Part_Data
.\importpartdata.csv
1
2
3

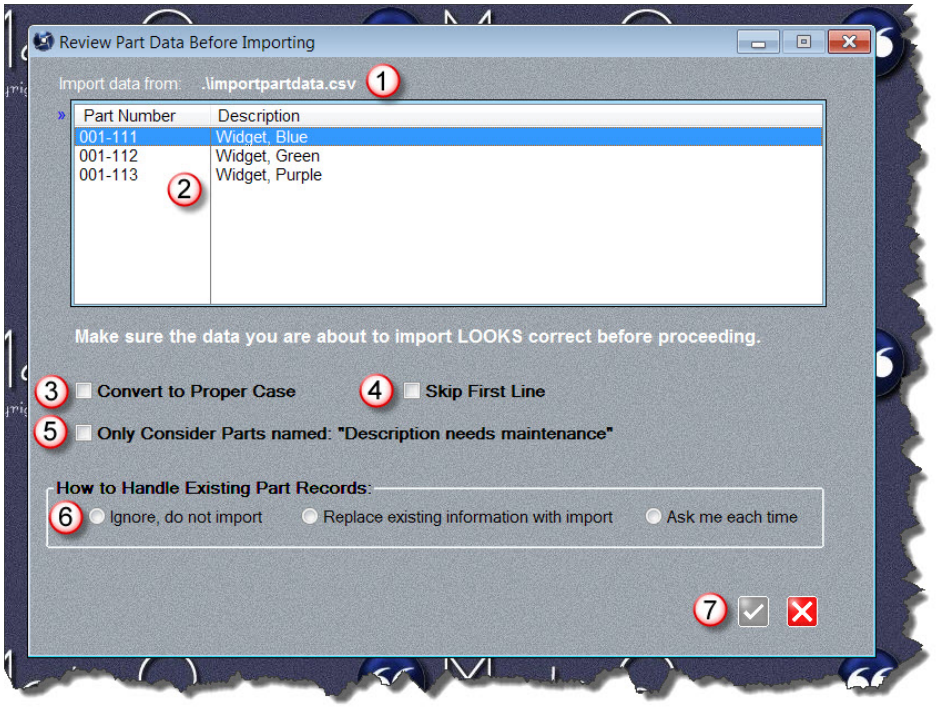
1. Use the look up button to browse files and click on the file you wish to import from.
   Or...

2. Type in the path and filename of your import file. Then...

3. Press the OK button to continue.

MasterQ will remember the file you choose. If you import this information again in the future, the file you used will be filled in automatically. If you want to use the same file, all you will need to do is press the OK button.

There are several options to consider before you import the part information.


Review Part Data Before Importing
Import data from: .\importpartdata.csv
1
Part Number
Description
001-111
Widget, Blue
001-112
Widget, Green
001-113
Widget, Purple
2
Make sure the data you are about to import LOOKS correct before proceeding.
3
Convert to Proper Case
4
Skip First Line
5
Only Consider Parts named: "Description needs maintenance"
How to Handle Existing Part Records:
6
Ignore, do not import
Replace existing information with import
Ask me each time
7

1 The file you have selected to import from is displayed here. This is helpful if the file does not seem to contain what you expected.

2 Import data list shows the contents of the file. You should examine the displayed information to confirm that the part numbers look correct and that they appear in the first

column. The description should appear in the second column if you have exported the file correctly.

3 Check Convert To Proper Case if your imported information is in all capitals and you wish to automatically change it to a mix of upper and lower case characters. For example, WHEEL would become Wheel.

4 Some programs automatically include a first line in the export file they create that lists the column heading. This might appear as "Part Number" or something similar. Check Skip First Line and MasterQ will ignore the first line.

5 Certain Agenda Development programs may automatically create part records for you under certain conditions. For example, BucketManager will automatically create

a part number if you import a customer order for that part number. Part records may

also be created automatically if you import inventories from another system, but the part

with inventory does not exist in MasterQ. In these cases, the description will be set as

"Description needs maintenance". Check this option to *only* update part records with a current description of "Description needs maintenance".

6 When the import process finds a part that already exists in your parts database a choice must be made. Check "**Ignore, do not import**" to skip existing parts. This

is helpful if you have modified the description from it's original content. For example,

many accounting systems may use names that are fine for internal use, but not marketing

optimized. You don't want to lose improvements you have made. Check "Replace existing

information with import" if you wish to use the descriptions from your import file even if

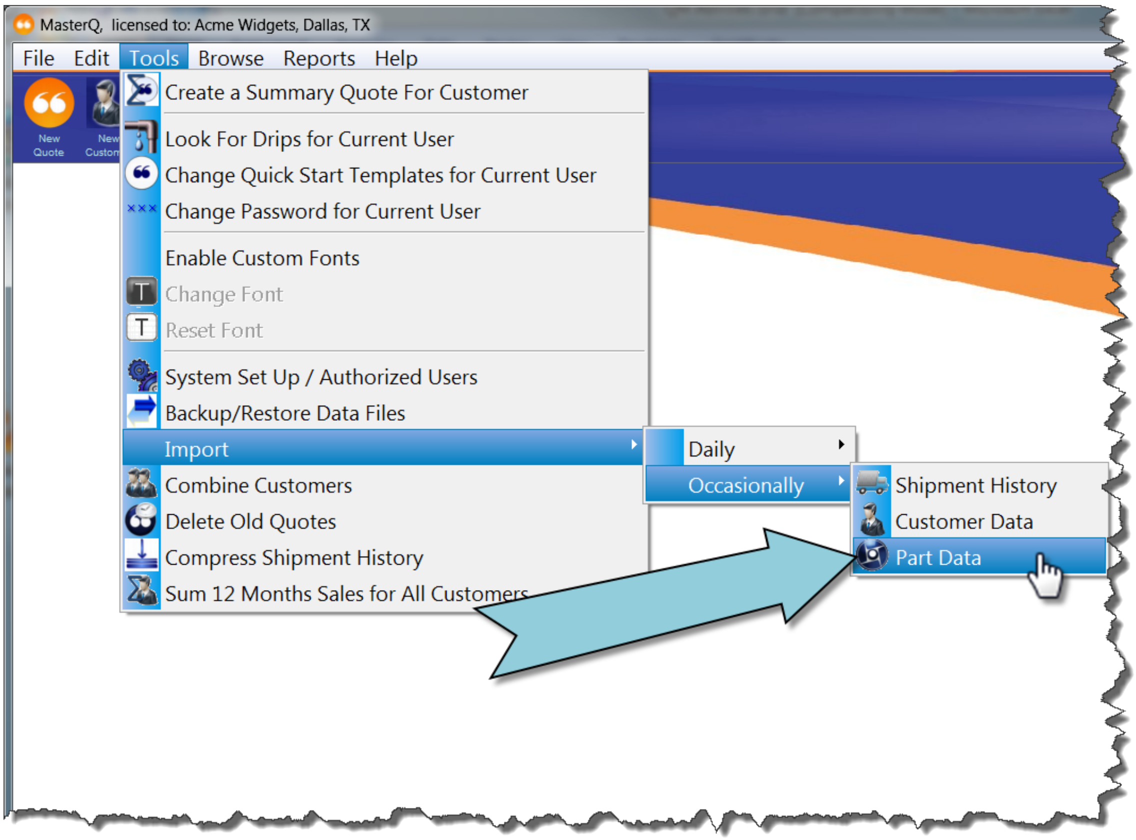
you have made changes to them in MasterQ. Checking "Ask me each time" will show you

changes and ask you to select which you wish to use. Parts with descriptions that match the import file will be ignored to save you time.

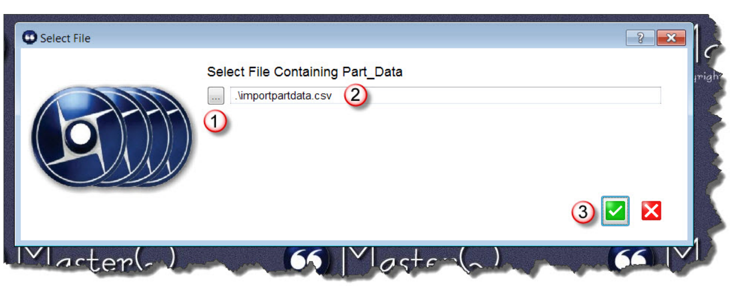
7 Once you have made the required decisions, the OK button will be enabled and you may proceed.

After the import process, a confirmation window will show the number of new parts added, modified, skipped and any errors encountered.

After you have created your CSV file with the part information to import, Select **TOOLS-IMPORT-OCCASIONALLY-PART DATA** from the main menu.



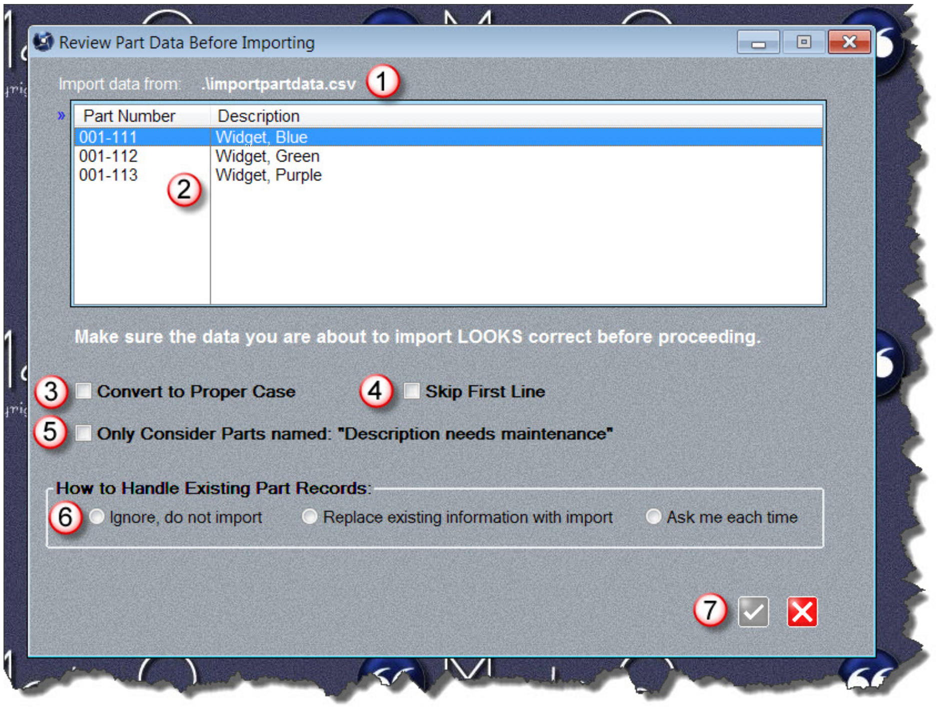
Next, you will need to tell MasterQ which file contains your data.



1. Use the look up button to browse files and click on the file you wish to import from. Or...
2. Type in the path and filename of your import file. Then...
3. Press the OK button to continue.

MasterQ will remember the file you choose. If you import this information again in the future, the file you used will be filled in automatically. If you want to use the same file, all you will need to do is press the OK button.

There are several options to consider before you import the part information.


Review Part Data Before Importing
Import data from: .\importpartdata.csv
1
Part Number
Description
001-111
Widget, Blue
001-112
Widget, Green
001-113
Widget, Purple
2
Make sure the data you are about to import LOOKS correct before proceeding.
3
Convert to Proper Case
4
Skip First Line
5
Only Consider Parts named: "Description needs maintenance"
How to Handle Existing Part Records:
6
Ignore, do not import
Replace existing information with import
Ask me each time
7

1 The file you have selected to import from is displayed here. This is helpful if the file does not seem to contain what you expected.

2 Import data list shows the contents of the file. You should examine the displayed information to confirm that the part numbers look correct and that they appear in the first

column. The description should appear in the second column if you have exported the file correctly.

3 Check Convert To Proper Case if your imported information is in all capitals and you wish to automatically change it to a mix of upper and lower case characters. For example, WHEEL would become Wheel.

4 Some programs automatically include a first line in the export file they create that lists the column heading. This might appear as "Part Number" or something similar. Check Skip First Line and MasterQ will ignore the first line.

5 Certain Agenda Development programs may automatically create part records for you under certain conditions. For example, BucketManager will automatically create

a part number if you import a customer order for that part number. Part records may

also be created automatically if you import inventories from another system, but the part

with inventory does not exist in MasterQ. In these cases, the description will be set as

"Description needs maintenance". Check this option to *only* update part records with a current description of "Description needs maintenance".

6 When the import process finds a part that already exists in your parts database a choice must be made. Check "**Ignore, do not import**" to skip existing parts. This

is helpful if you have modified the description from it's original content. For example,

many accounting systems may use names that are fine for internal use, but not marketing

optimized. You don't want to lose improvements you have made. Check "Replace existing

information with import" if you wish to use the descriptions from your import file even if

you have made changes to them in MasterQ. Checking "Ask me each time" will show you

changes and ask you to select which you wish to use. Parts with descriptions that match the import file will be ignored to save you time.

7 Once you have made the required decisions, the OK button will be enabled and you may proceed.

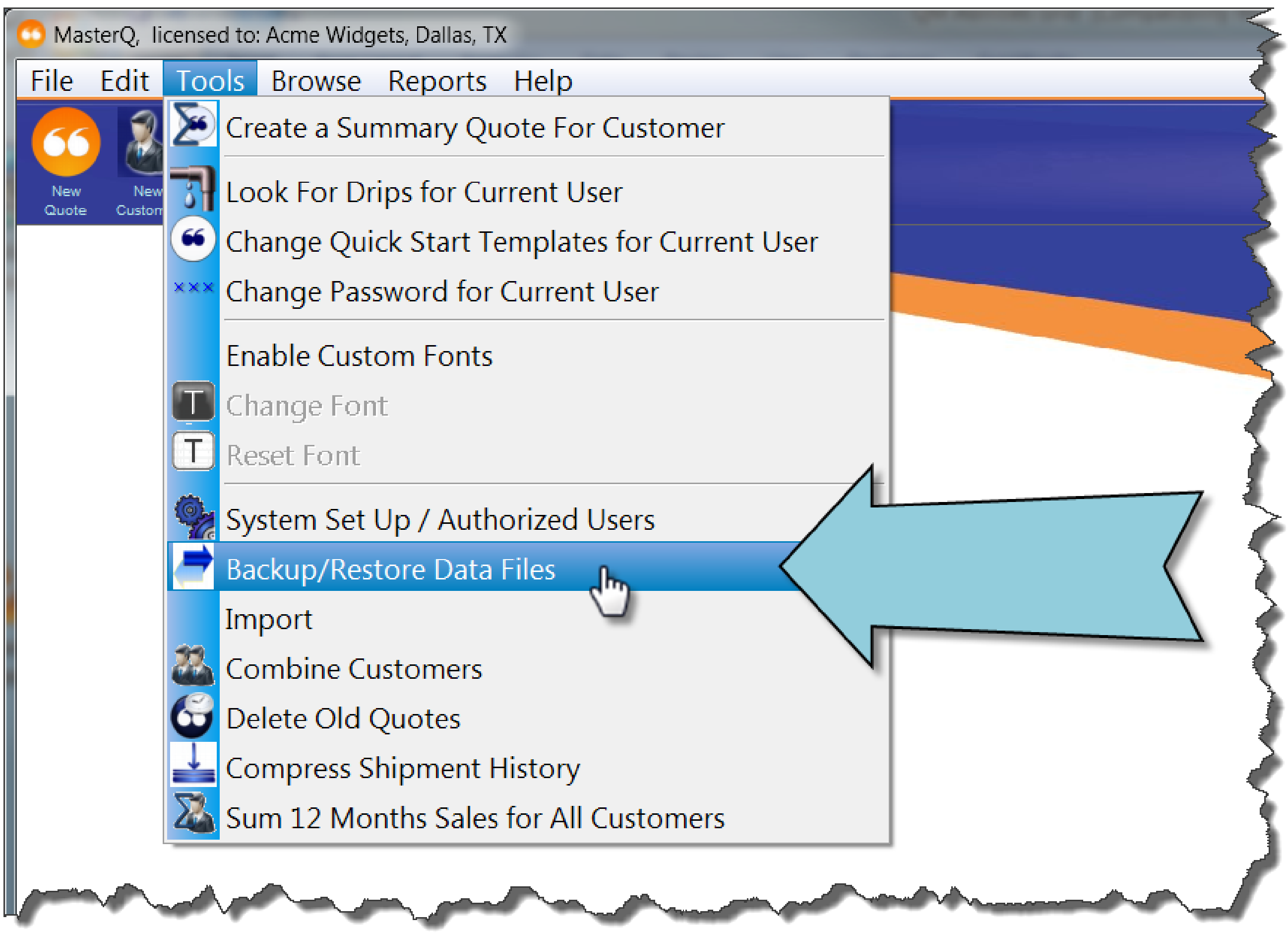
After the import process, a confirmation window will show the number of new parts added, modified, skipped and any errors encountered.

Backing Up and Restoring Data Files

A good back up system is a must. We recommend implementing a daily back up procedure for the entire folder and sub-folders where MasterQ is installed.

The built in BackUp and Restore procedure *only copies the data files* to a directory of your choice. These data files consist of a number or files with the TPS extension. They are located in the DATA folder where you installed MasterQ. In addition, there is one other file, UPG.TPS that is located in the MasterQ installation folder that should be backed up. All of these files are backed up and/or restored for you when you use the Backup & Restore command from the main menu.

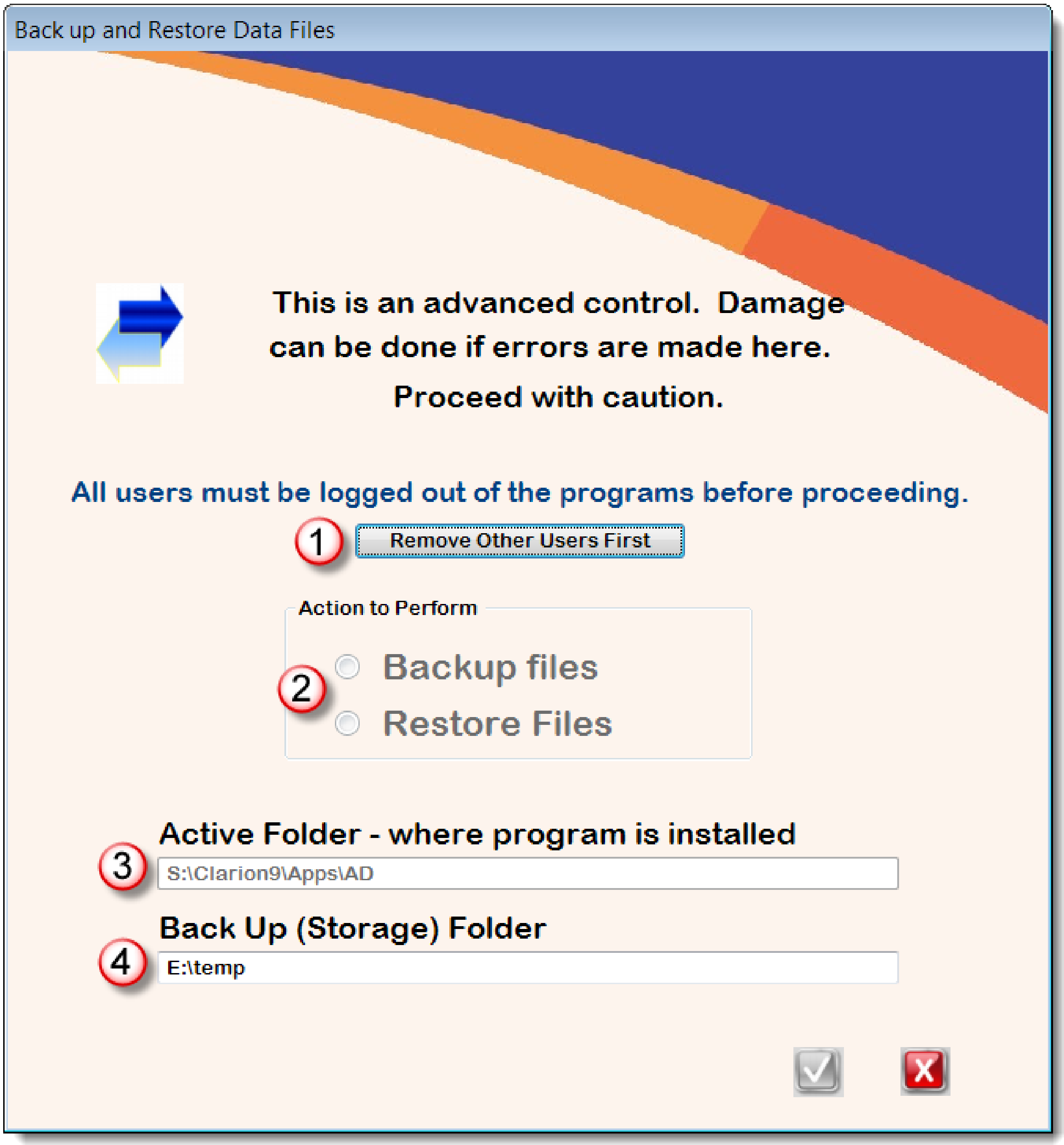
To begin the BackUp and Restore procedure, select **Tools|Backup and Restore** from the main menu.



Next: [Backing up data files]

Backing Up Data Files

The same procedure window is used for making backups as well as restoring saved data. Despite the dire warning, damage cannot be done if you are simply doing a back up.



Remove other users button. Notifies other users that they have 60 seconds to complete their tasks and exit the programs.

Backup files - current data files will be copied to another location for back up purposes.

3 This is the location of your active data files

4 This is the folder where the data files will be copied to.

When you press the **Remove Other Users** button, a message will appear on the screen of any other person logged into one of Agenda Development's programs. They will be given one minute to finish what they are doing. At the end of 60 seconds, their program will be shut down even if they are not at their computer. A count-down window will be displayed on your screen.

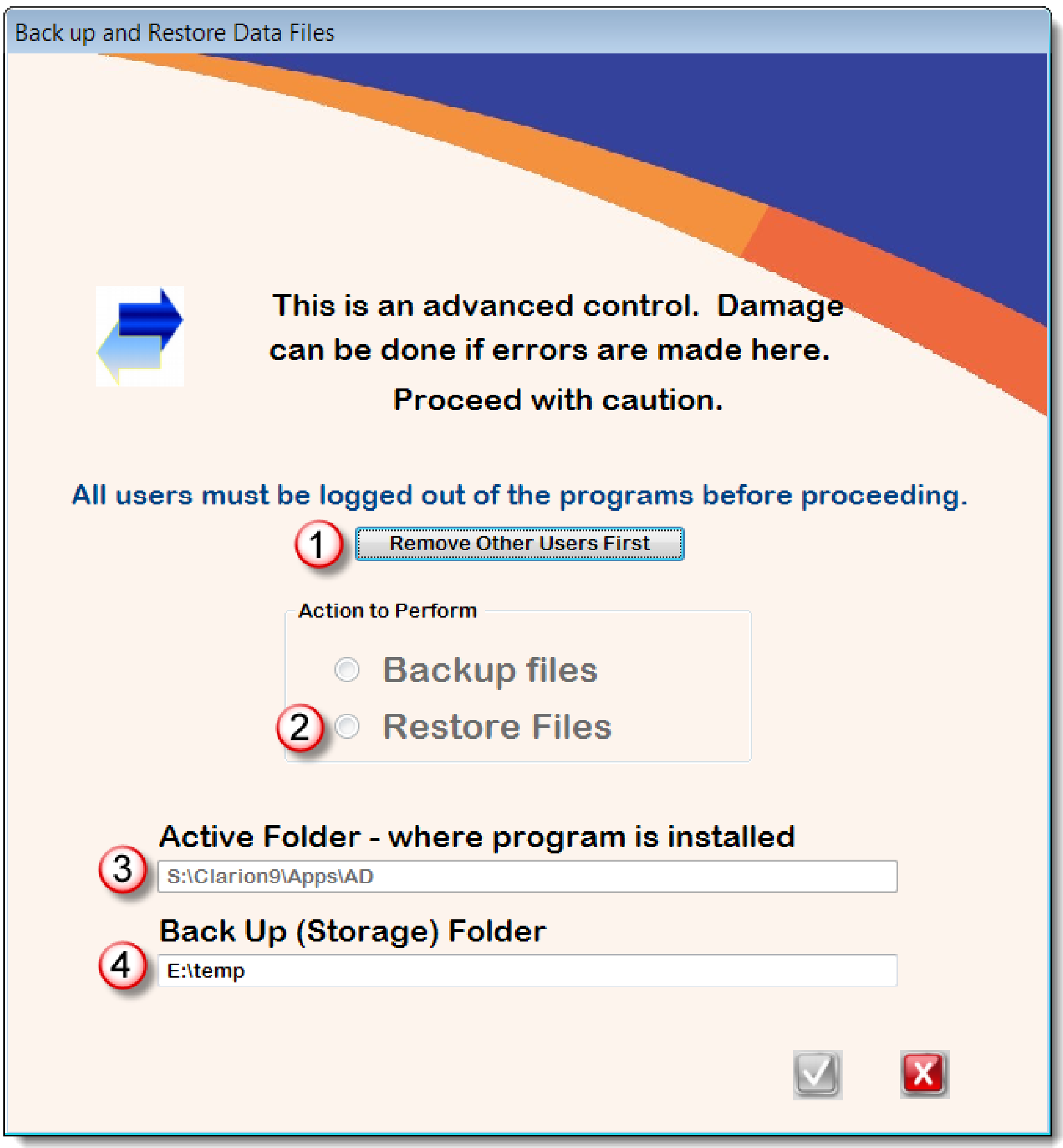
If a user tries to log in while you are performing the backup operation, they will see a warning sign and will not be permitted to start the program. For more information, see Locked Out.

After the backup procedure has been completed, users will be allowed back into the programs. You do not need to do anything to allow them back in. The un-locking occurs automatically.

Next: Restoring Data

This procedure is used to copy data files you have previously backed up to your program folder. **Any changes that have been made since your backup are lost. However, the quote documents that you have created will still be located in the correspondence folders, even if the record of the quote is lost.**

Restoring data files in this manner is a method of last resort. Before restoring, try repairing your data files using the repair option.



1

Remove other users button. Notifies other users that they have 60 seconds to complete their tasks and exit the programs.

NOTE: **All changes made since the last back up will be lost.** What tasks are the other users doing? Do they know their information will be lost?

2 Backup files - current data files will be copied to another location for back up purposes.

3

This is the location where your MasterQ program is installed and your active data files are stored.

4

This is the folder where the previously backed up data files are located.

After you press the OK button, the previously saved data files are copied back to your working folder and the programs are un-locked.

FAQ's - Frequently Asked Questions

System Requirements

What hardware do I need?

MasterQ runs on all recent versions of Windows. There are no special hardware requirements, however, many of the screens in the program take advantage of 1,024 x 768 pixel screen resolutions. Given the low cost of modern monitors, if you are using smaller screens, we strongly suggest upgrading. (You will thank us for this advice.)

What other software do I need to run MasterQ?

MasterQ runs under versions of Microsoft Windows XP and better. Limited testing has been successful under earlier versions, but cannot be guaranteed. MasterQ requires Microsoft Word to be installed on each computer. Supported versions of Microsoft Word are versions 2000 and above. Microsoft Excel is required for some charts and can be used to quickly export any displayed information from MasterQ.

Do I need to install MasterQ on a network?

No, but installing on a network will enable others in your organization to access the quotes you create. Also, there are other Agenda Development programs that can work *with* MasterQ to offer additional benefits.

Exporting information out of MasterQ

Can I export data from MasterQ easily?

Yes, any information displayed on a browse table can be exported into a Microsoft Excel spreadsheet with three mouse clicks. For details, click here.

What order will be used when exporting data to Excel?

What ever is displayed is what will be exported, in the order it is shown. You can use the Query Button or Query Center (if they are offered for the browse table you are working on) to limit the displayed information.

Notes

Why can't I see all notes?

Notes that are created in Agenda Development programs have the option of being designated as Private. Private notes are only displayed to their author and Super-Users.

Why can't I change or delete a note?

Only the user who created a note can make changes to it, including removing it. All notes may be changed or deleted by Super Users.

Why does a note open up every time I look at a particular customer, or person, or quote?
The author of the note has marked it as "Must View". To stop this from happening, browse the notes, double click on the offending note then un-check the Must View box. TIP: Only the author or a user designated as a Super-User can change anyone else's notes.

Quotes

What are Quote Templates?
Quote templates are documents created in Microsoft Word that are the starting point used when creating a quote. See Quote Templates

Can each User have their own unique Quote Template?
Yes. Special quotes for a particular user are set in the user's record which you access in the System record. If all Users will use the same standard quote template, the easiest way to set this up is using the System | Set Up commands from the main menu.

How many line items can be on one quote?
These is no practical upper limit.

Why can't I make changes to an existing quote?
You can make changes to quotes you created, otherwise the Insert, Change and Delete buttons are disabled. Quotes made by someone else may only be changed by the author or users who are designated as MasterQ Managers, or Super Users. These attributes are set in the Users set up form. For more information, click here.

Can I create a PDF to email my quote?
Anything you can do in Word can be done with your quote. Creating a PDF document is an excellent way to distribute your quotes. Newer versions of Word include the ability to "print" to a PDF file. If you have an older version that does not include this feature, we recommend CutePDF* from Acro Software. Acro offers a free version of their excellent PDF creator which is all you will need to create PDF documents from any of your programs, not just MasterQ. Once installed, the CutePDF option is listed as another printer connected to your computer. As an added benefit, this PDF printer is available to all of your other programs.

Acro also offers an inexpensive paid upgrade to CutePDF. For $50, the CutePDF Pro allows you to combine multiple PDFs, break them apart, draw on them, and much more. We've been using CutePDF Pro for years without issue and highly recommend it.

* CutePDF is a trademark of Acro Software and is not affiliated with Agenda Development.
www.CutePDF.com

Salesmen

I can't add/change/delete salesmen.
To edit salesmen you must have the proper authority. Only users who are designated either Sales Manager, Super User or who have the "Edit Sales Reps" check box marked in their user records may make these changes.

Customers

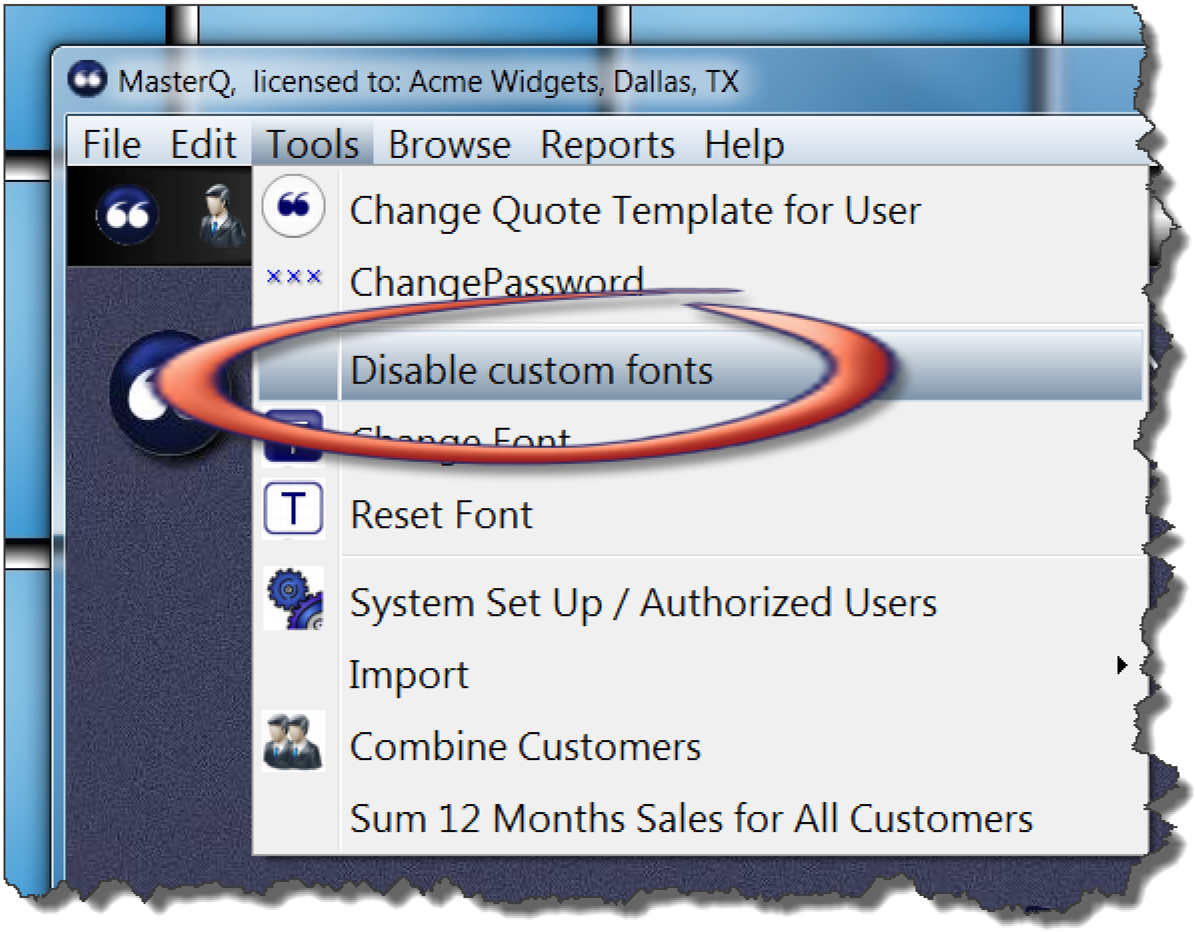
Parts

Miscellaneous

Sometimes there is a delay when starting the program. Most times not. Why?
MasterQ does periodic file maintenance. Each day, one file is processed. This only happens the first time the program is run each day by any user.

Sometimes there is a delay when opening a window. Why?
Some windows, like the Parts window, do a significant amount of housekeeping each time they are opened. This delay might be more pronounced on slower computer systems.

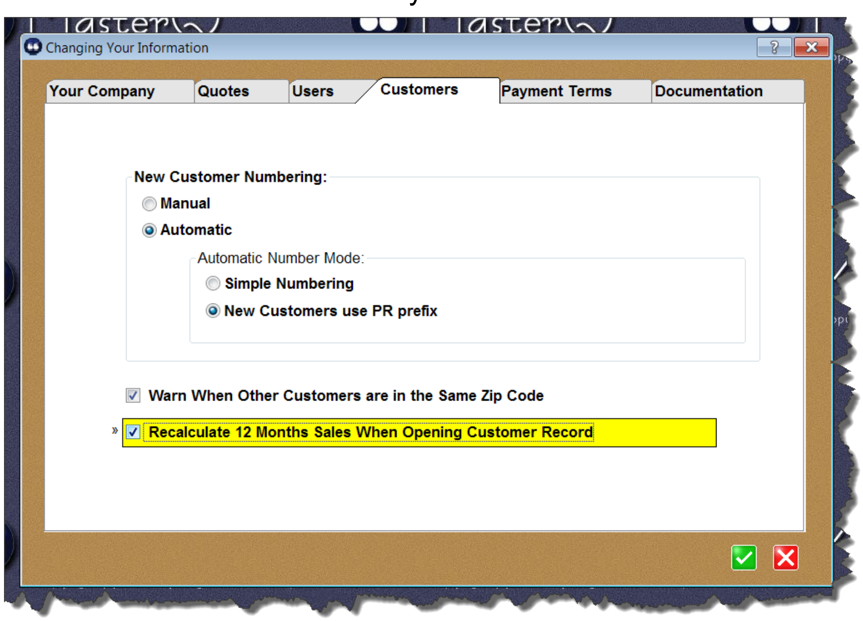
Using custom fonts might slow the program down a bit. You can disable the custom fonts from the main menu if you prefer to give up these features.



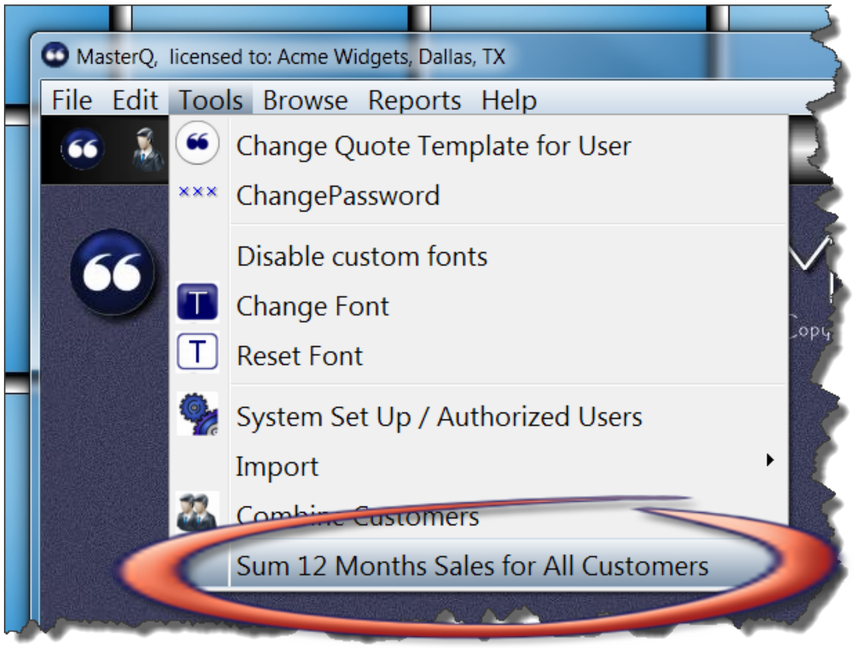
MasterQ automatically re-calculates the customer's 12 months previous sales when the customer window is opened. This can cause a slight delay. You may choose to calculate the 12 month sales history for all customers at one time, but only when you specifically ask for the update. This will speed up the opening of the customer window, but the 12 month sales total dollars will only be as up to date as the most recent time you issued the command.

To disable the automatic recalculation of customer sales each time the window is opened, to the Customers tab on your system record. Un-check the Recalculate command.

(note: you must be a super-user to do this.)



If you disable the automatic calculations as explained above, you should periodically update all customers at one time. Use the TOOLS-SUM 12 MONTH SALES FOR ALL CUSTOMERS command on the main menu.

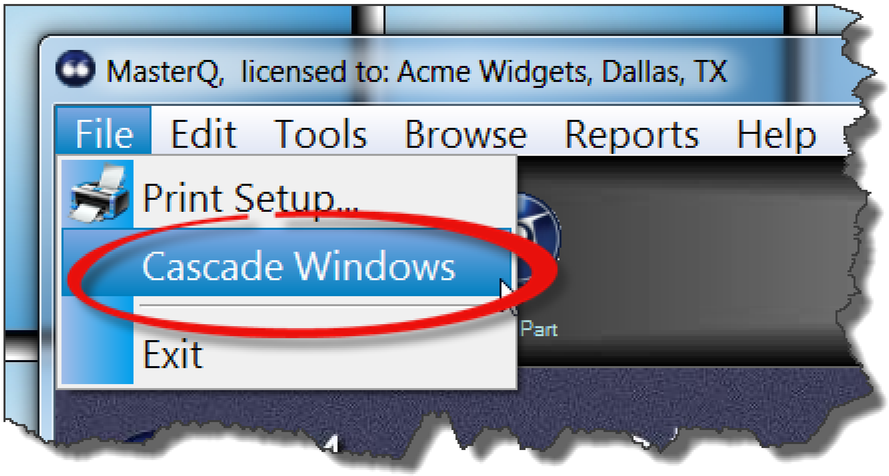


I can't import files from the main menu. The choice is grayed out. Why?

You must have the proper authorization set up in your user record.

My window has opened off the visual screen. I can't drag it back where it belongs. Or, the window doesn't seem to open.

Possibly the window *is* open, but located outside of your current screen view. This can happen if you change screen resolutions, or use multiple monitors. The fix is easy: From the main menu, select File | Cascade Windows.


MasterQ, licensed to: Acme Widgets, Dallas, TX
File
Edit
Tools
Browse
Reports
Help
Print Setup...
Cascade Windows
Exit
Part