

# **MasterQ - From Call to Quote in 30 Seconds**

**User guide**

## Table of Contents

MasterQ - From Call to Quote in 30 Seconds.....	4
Consider this first.....	7
Microsoft Security Essentials.....	8
MasterQ Requirements.....	9
Choosing a Location for the Program.....	12
Assigning part numbers.....	13
Assigning customer numbers.....	15
Installation.....	18
System Record.....	19
Company Tab.....	21
Quotes Tab.....	22
Users Tab.....	25
Customers Tab.....	29
Parts Tab.....	32
Payment Terms.....	34
Notes Tab.....	37
Creating the Part Database.....	40
CSV Files.....	42
Adding One Part Record Manually.....	43
Adding a Part Record (New) window.....	44
Creating Part Records by Importing .....	48
Creating the System Record.....	93
Creating Customer Database.....	94
Telling MasterQ How to Number Your Customers.....	96
Importing Customer Data.....	99
Creating Customer Records Directly.....	102
Entering or Changing Customer Information.....	104
Look Up Pricing.....	107
Changing an Existing Customer Record.....	108
Creating the Salesman Database.....	109
Setting Up Payment Terms.....	111
Setting Up Users.....	114
Exporting a Browse Table.....	119
Filtering a Browse Table.....	121
Personal Shortcut Menus.....	122
Notes.....	125
Adding a Note window.....	128
Security.....	132
Changing the User's Password.....	134
Logging In.....	136
Logging in Manually.....	137
Logging in Automatically.....	138
Importing Shipment History.....	139
FAQ's - Frequently Asked Questions.....	142
Periodic Maintenance.....	147
Compress Shipment History.....	148

Combining Customers.....	152
Deleting Old Quotes.....	154
Quote Templates.....	157
Setting the Default Quote Template for a Single User.....	160
Fries: Up-Selling System.....	162
Custom Fonts.....	166
Enabling & Disabling Custom Fonts.....	167
Changing Fonts.....	169
Resetting Fonts.....	171
BackUp and Restore Data Files.....	172
Backing up Data Files.....	173
Restoring Data Files.....	175
Importing Inventories.....	190
Importing Customer Orders.....	194
Importing Part Data.....	195
12 Months Sales Dollars.....	245
Sum 12 Month Sales for All Customers.....	249

## MasterQ - From Call to Quote in 30 Seconds

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"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. When I needed to see the physical quotation, someone had to visit the filing cabinet and locate the document in question. Hopefully, it was filed accurately.

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.
- **Always have product information at your fingertips.** Access incredible part information using the included Parts database.
- **Always have customer information at your fingertips.** Phone numbers, address, web site links, shipment history and contact information.
- **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...

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There are just a couple of things 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.

### [Review the MasterQ Requirements](#)

[You need to decide where to install the MasterQ program.](#)

[Do you have a unique part number assigned to each of your products?](#)

[Do you have a unique ID number assigned to each of your customers?](#)

## Microsoft Security Essentials

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Security Essentials is a free anti-virus protection program offered by Microsoft. If you do not have MSE installed on any of the PC's that will be using our programs, this note does not apply.

The Microsoft MSE program has been known to cause file errors in certain data files while protecting from potential virus attacks. Agenda Development's products will not run on a computer that has MSE installed *unless* the user has specifically disabled files with a **TPS** extension.

[Next: MasterQ Requirements](#)

## MasterQ Requirements

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**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. <G>

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.

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 800 x 600 pixel display and a [tool](#) is included to give you lots of display flexibility. But consider those big screen monitors when they're in your budget. Regardless of the programs you use, you will find this a real asset.

MasterQ does not require a network to operate. You can install it on 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: You need to decide where to install the QMaster program.](#)



## Choosing a location for the program

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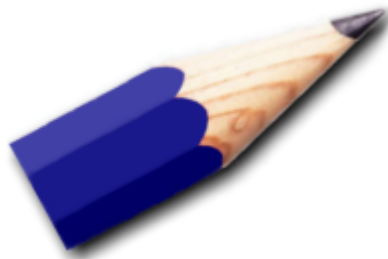
If the MasterQ program will only be used by one person, on one particular computer, installing the program on a local hard drive on that one machine will result in the best performance and security. The trade off is that the program will *only* be available to people with access to that particular computer 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.

If you are using other Agenda Development software, install MasterQ in the same directory. For example, the NaftaBlaster program uses the same customer file and shipment history to generate annual Nafta 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 program.



[Next: Do you have a unique part number assigned to each of your products?](#)



## Assigning part numbers

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

The MasterQ program can accept up to 15 numbers or letters as part numbers. MasterQ can quote parts that you have not assigned part numbers to, however, you forfeit the ability to easily reference these phantom quotes. 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 and are easier to remember.

**Each unique part needs it's own unique part number.** This is a problem that many company's struggle with.

**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, commas or spaces. 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.

[Next: Do you have a unique ID number assigned to each of your customers?](#)

## Assigning customer numbers

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### 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. This ID number will be used as a short-cut to link customers to quotes, sales reps, pricing, etc. 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. Using the same numbers will make it easier for people who work in both systems. Plus, importing 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. 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](#).



## Installation

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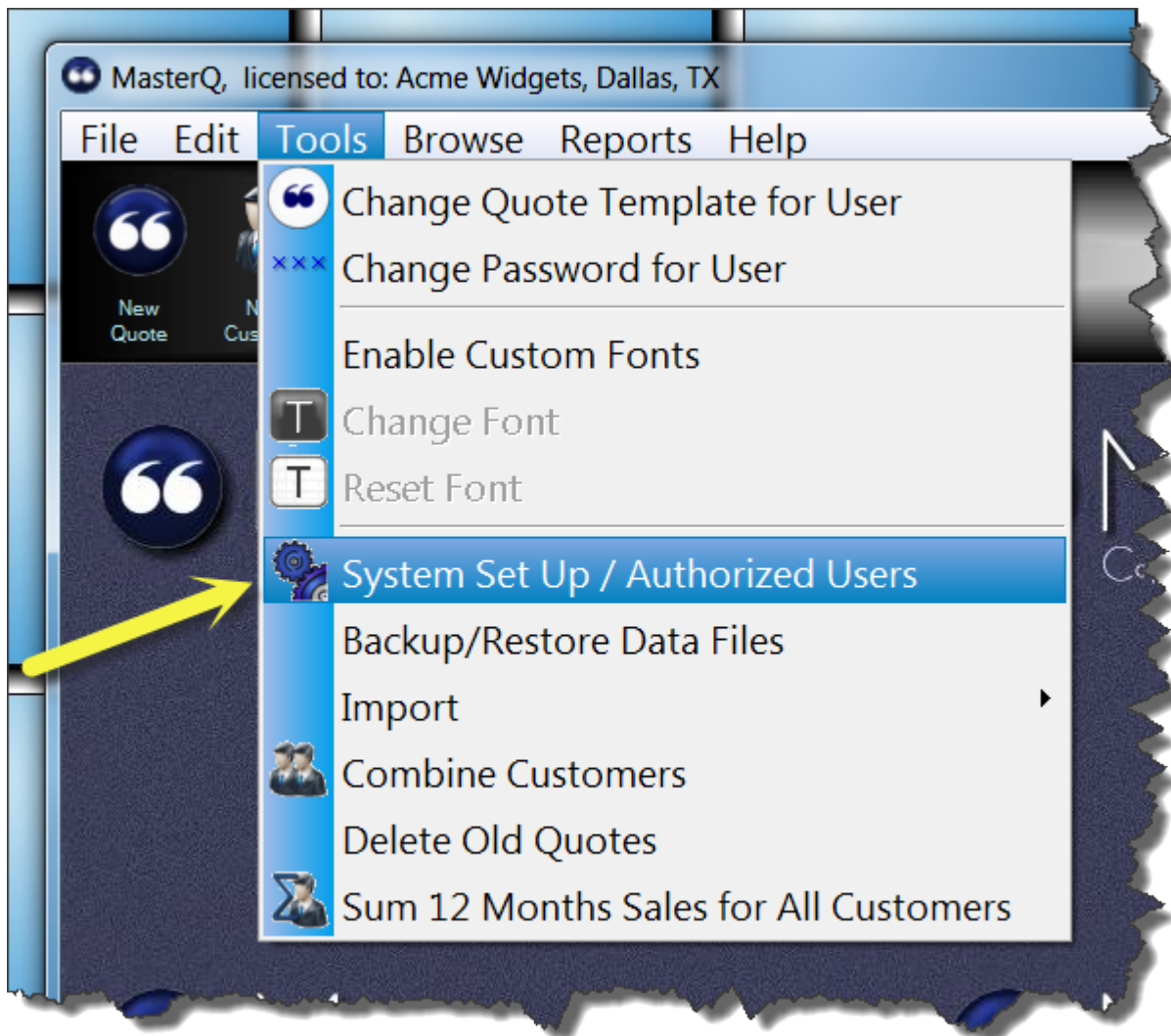
<TODO> Insert description text here... And don't forget to add keyword for this topic

## 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.



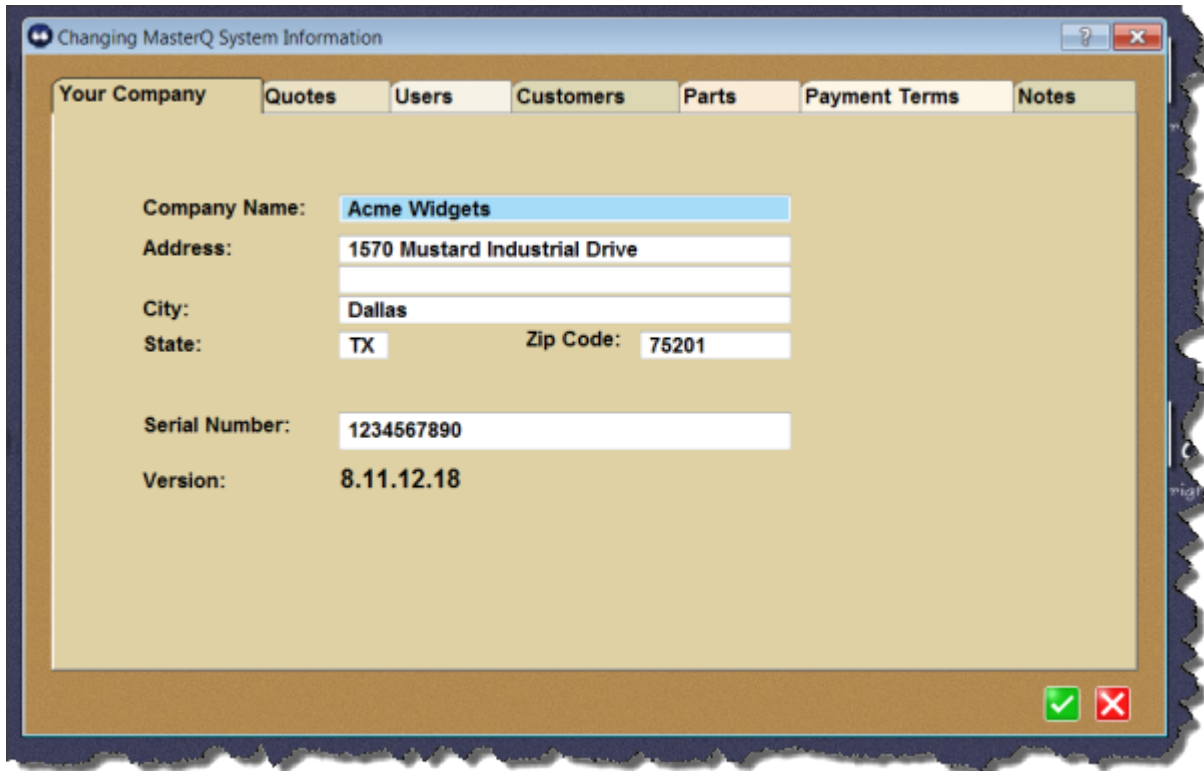
Next: [Company Tab](#)





## Company Tab

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



The screenshot shows a software window titled "Changing MasterQ System Information". It features a tabbed interface with the following tabs: "Your Company", "Quotes", "Users", "Customers", "Parts", "Payment Terms", and "Notes". The "Your Company" tab is currently selected. The form contains the following fields and values:

Company Name:	Acme Widgets		
Address:	1570 Mustard Industrial Drive		
City:	Dallas		
State:	TX	Zip Code:	75201
Serial Number:	1234567890		
Version:	8.11.12.18		

At the bottom right of the dialog, there are two buttons: a green checkmark button and a red X button.

Next:

[Quotes Tab](#)

## Quotes Tab



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

MasterQ uses a Quote Template as a starting point when creating quotes. These templates are basically Word documents and can be modified to meet your specific needs. The quote template you select 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.

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.

**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.

4

**Quote Substitutions** - Displays a PDF document listing all of the available quote macros.

Fries are MasterQ's unique tool to help you up-sell your customers. You may identify any number of products your customers should consider when purchasing your items. By selecting to automatically show fries, the related items will automatically be displayed when you create a quote for those part numbers.

Find out more about fries [here](#).

5

**Automatically show "Fries"** - Check this box and if fries have been identified the user will see a list of these related products when building a quote. If the box is not checked the user can still view the list but only by clicking the appropriate button on the form. We suggest checking this box.

FOB stands for "free on board" and may indicate who pays shipping charges and where the legal possession of the goods will take place. This may be important for determining liability for goods which may be lost or damaged in transit to the buyer.

6

**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.

Ship Via explains how you will ship the customer's purchases.

7

**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.

Shipping Date is the term you most often wish to use on your quotes for lead time.

8

**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.

Name	Initials
<b>KRAIG</b>	KPW
<b>KATHY</b>	KAT
<b>DAN</b>	DC
JOE	JOE
GEORGE	GEO
TONY	TNY
FLOOR	FLR

Insert Change Delete

Users authorized to use the quote program shown in **BOLD**

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 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.

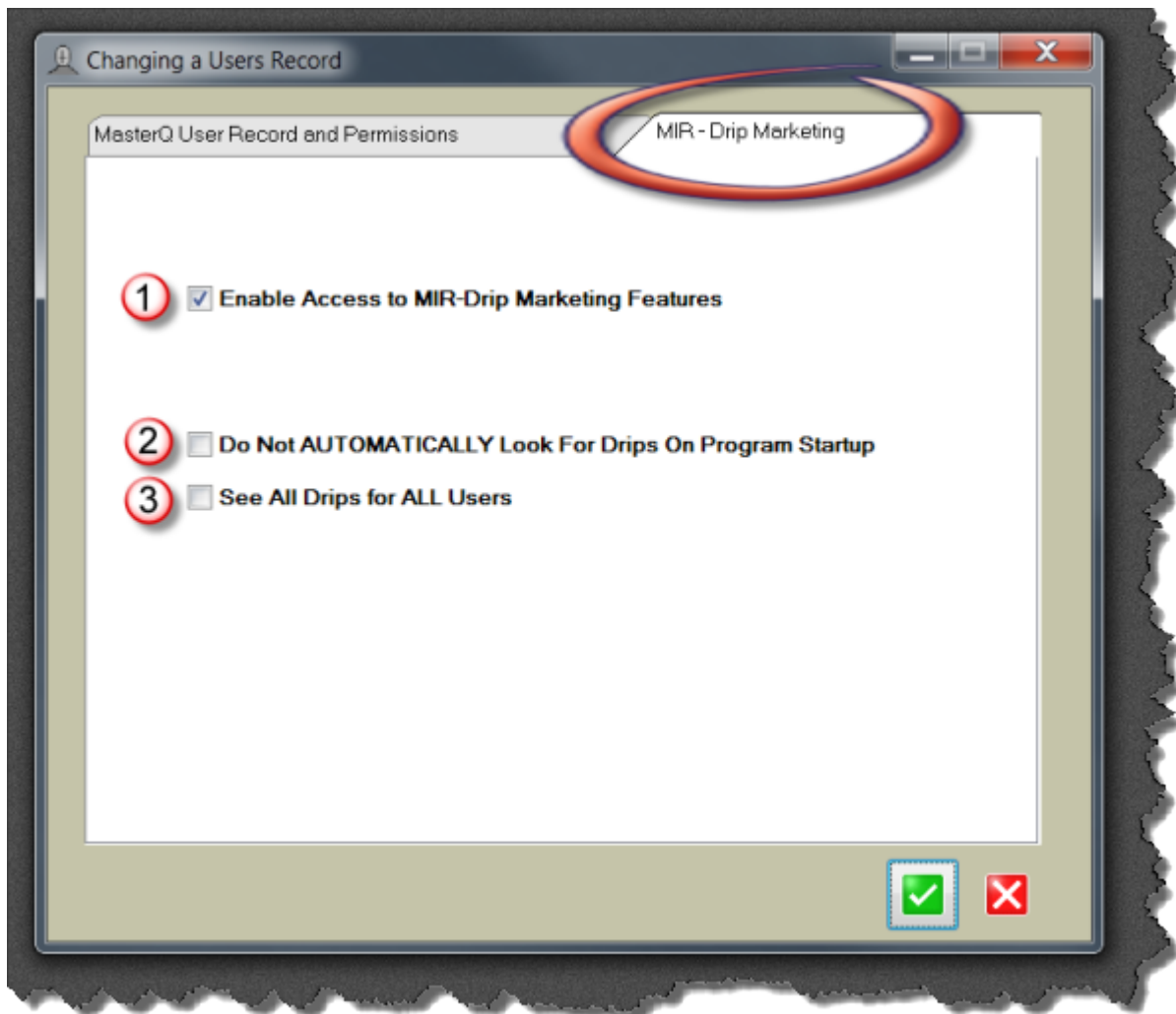
## Edit User Record

The screenshot shows a Windows-style dialog box titled "Changing a Users Record". Inside, there's a section titled "MasterQ User Record and Permissions". It contains several input fields and checkboxes. Numbered callouts (1-14) point to specific elements: 1 points to the "User Name" field (containing "KRAIG"); 2 points to the "Initials" field (containing "KPW"); 3 points to the "Password" field (containing three dots); 4 points to the "User Permissions" section; 5 points to the "MasterQ Program Access" checkbox (which is checked); 6 points to the "Create New Quotes" checkbox (which is checked); 7 points to the "Default Quote Template" field (containing ".\QuoteKPW.doc"); 8 points to the "MasterQ Manager" checkbox (checked); 9 points to the "Edit Customer Records" checkbox (checked); 10 points to the "Edit Payment Terms" checkbox (checked); 11 points to the "MasterQ Super User" checkbox (unchecked); 12 points to the "Edit Sales Reps" checkbox (unchecked); 13 points to the "Edit Parts Records" checkbox (checked); and 14 points to the "Email Address" field at the bottom. At the bottom right of the dialog are a green checkmark button and a red X button.

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

4. **MasterQ Program Access** - Allows this user to start the MasterQ program. Remember, you may 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.
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. **MasterQ Super User** - Super users can modify many aspects of the program that are not enabled even for MasterQ managers.
12. **Edit Sales Reps** - Check this box to enable the user to create salesman records.
13. **Edit Part Records** - Checking this box allows the user to create new part records.

NOTE: The MIR program is an optional module that works in conjunction with the MasterQ program. If you do not have the MIR program installed, this tab will not be shown.



NOTE: The MIR - Drip-Marketing tab only appears if you have the MIR module installed. For more information, visit our [website](#)

1. **Enable Access to MIR-Drip Marketing Features** - Check this box to allow the user to use the drip marketing features.
2. **Do not AUTOMATICALLY Look for Drips on Program Startup** - If box is unchecked, the program will automatically look for scheduled follow up marketing steps each time. Unchecking the box will require the user to specifically ask for pending drips.

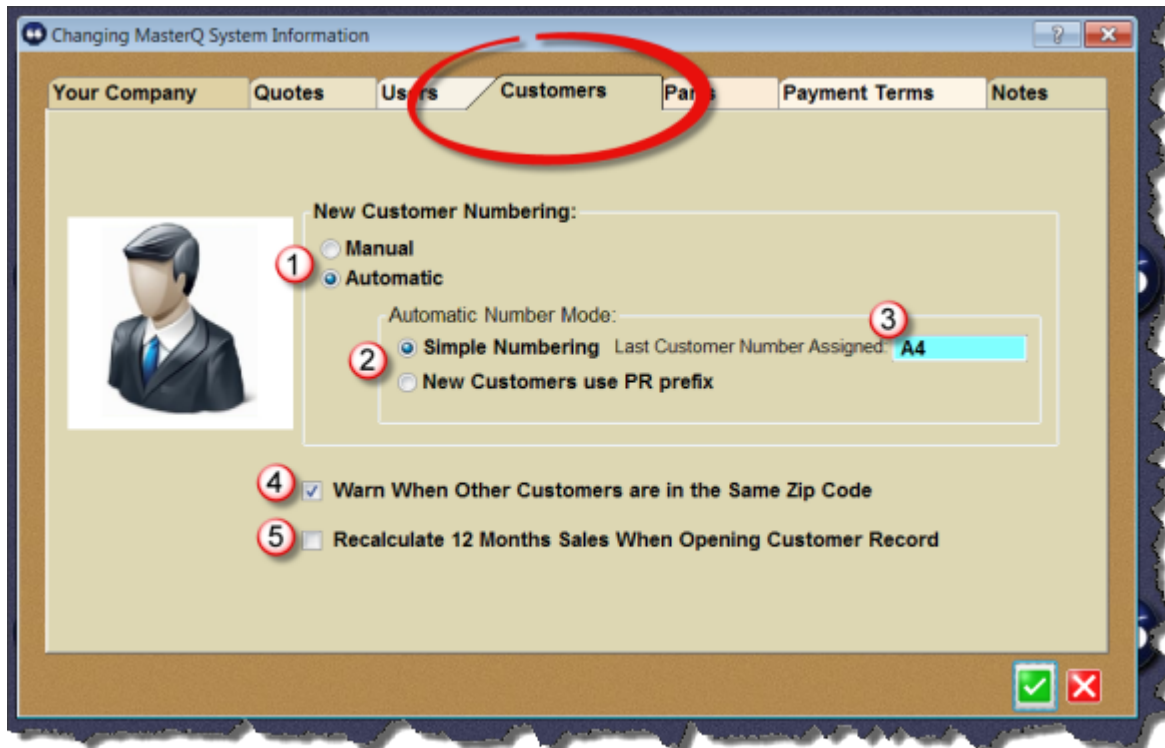
Next:

[Customers Tab](#)



## Customers Tab

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



**1 New Customer Numbering** - When creating a new customer record, you may choose whether to have MasterQ assign the customer numbers automatically or if you wish to create them yourself. If you use customer numbers in other programs or systems, we recommend you set this value for Manual. If you do not have customer numbers in use in another system you should choose Automatic.

**2 Automatic Number Mode** - Simple numbering is an easy option allowing MasterQ to assign your customer numbers.

If your system uses customer numbers in another program, and you need to assign customer numbers to prospects before they are added to your other system, you may choose New Customers Use PR prefix. This lets you add customers to the MasterQ customer database before adding them to your software system. These *prospect* numbers use a PR prefix and are assigned numbers such as PR00012. Later, when the prospect has become a "real" customer and has an official customer number from your other software, you can easily change them from the PR number.

3

**Last Customer Number Assigned** - If you are using the Simple Numbering system, MasterQ will begin searching for the next available customer number *starting* with this value. We recommend a starting value of A0 if you anticipate the number of customers to be less than 1,000. If you expect between 1,000 and 35,000, we suggest you use 3 character customer numbers and start with A00. Need more customers? You can use 4 character customer numbers for up to 1.3 million companies. Then start with A000. Longer customer numbers are more difficult to remember.

4

**Warn When Other Customers are in the Same Zip Code** - Check this box to be warned if you have existing customers in the same zip code. This will not *prevent* you from having more than one customer in one zip code, but it can help you identify entering a customer who is already in your customer database by mistake. We recommend un-checking this option if most of your customers are located in one geographic area.

5

**Recalculate 12 Months Sales When Opening Customer Record** - If you import your customer's sales history from another system, MasterQ can show you the sum of sales during the previous 12 months. Checking this box will cause the program to hesitate slightly when the customer form is opened, but the sales history value will always be up to date. If this box is unchecked, you will need to manually issue the **Sum 12 Months Sales for All Customers** command periodically to keep the sales dollar sum current. We recommend checking this box. If the slight pause when opening a customer form becomes an issue, you can un-check this box.

See how to manually recalculate all customer's sales history [here](#).

Next: [Payment Terms](#)

## 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 quickly.

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.

Part Button Text (1)	Folder (2)
Drawing	.ldrawings
Installation	.linstallation
Warranty	.lwarranty
Certifications	.lcertifications
QC Checklist	.lchecklists

1

**Part Button Text** - Enter a description to appear on each button. These buttons 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 part record. Imagine the confusion if a button 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 program location folder. (Typically, this would be located in a

network folder.) If you choose a folder located on your local 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.

Next: [Payment Terms](#)

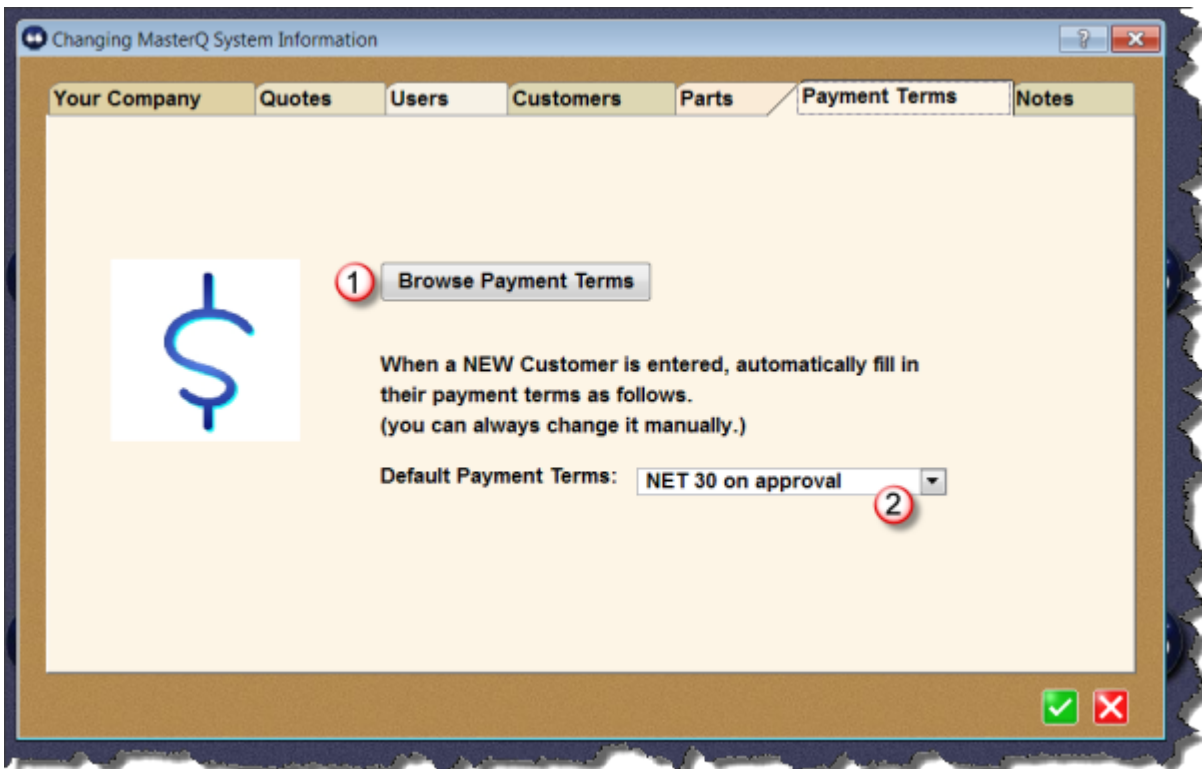
## Payment Terms

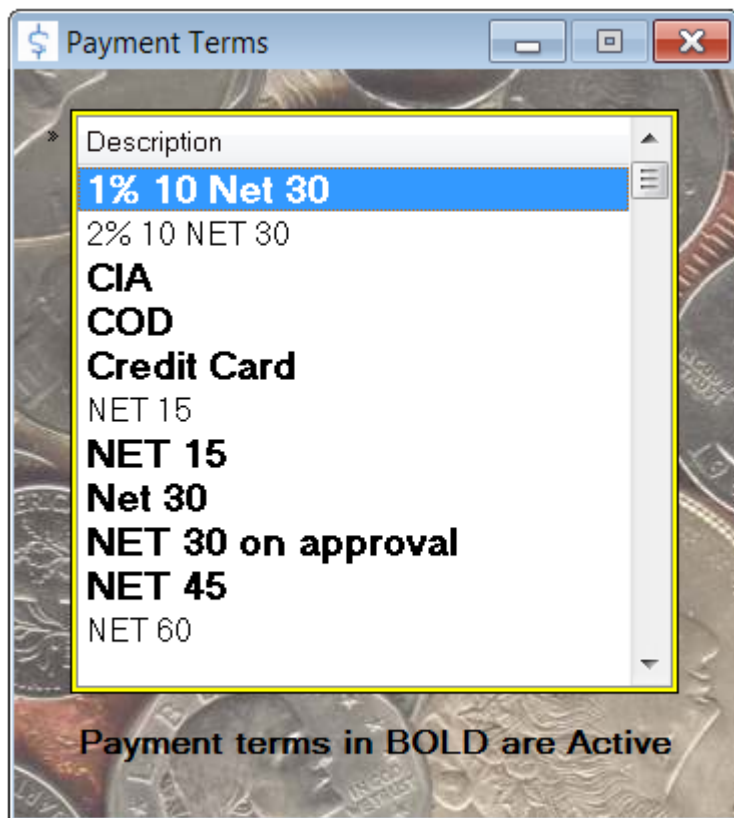
The payment terms tab lets you set the default payment terms to assign to new customers. This is not the payment terms that you offer your existing customers most often. This should be the payment terms for *new* customers. Such as NET 30 on Approval.

**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.

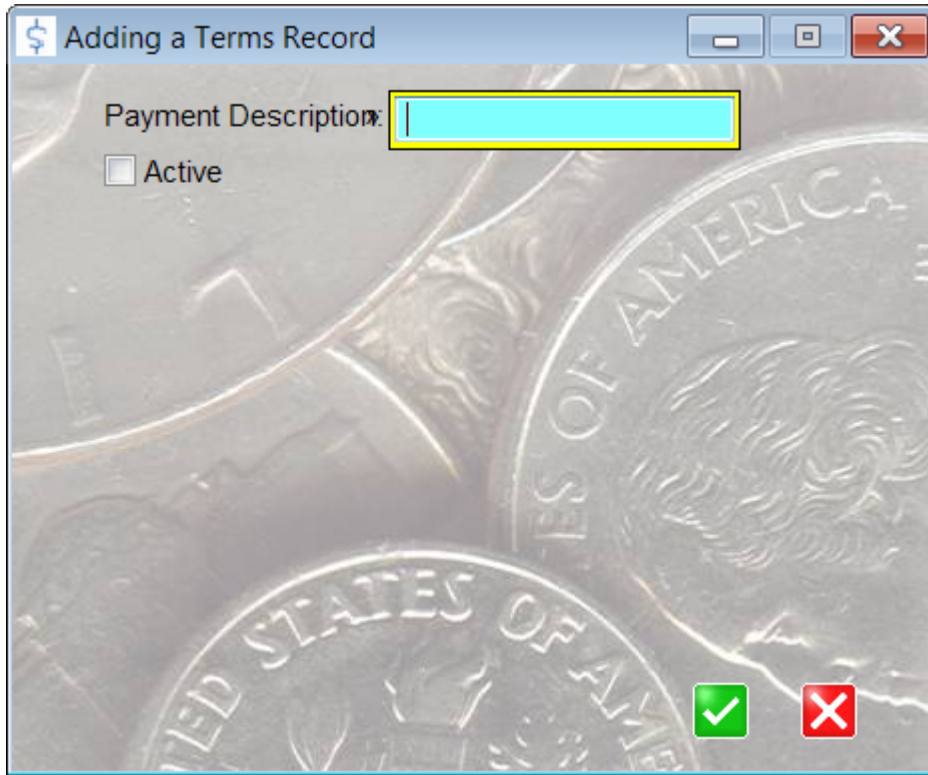
TIP: The default payment terms is *not* the terms you offer most often, such as NET 30. It is the default terms to offer *new* customers.





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.



Adding a Terms Record

Payment Description:

☐ Active

✓ ✗

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

Next:

[Documentation Tab](#)



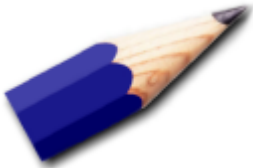
## Notes Tab

---

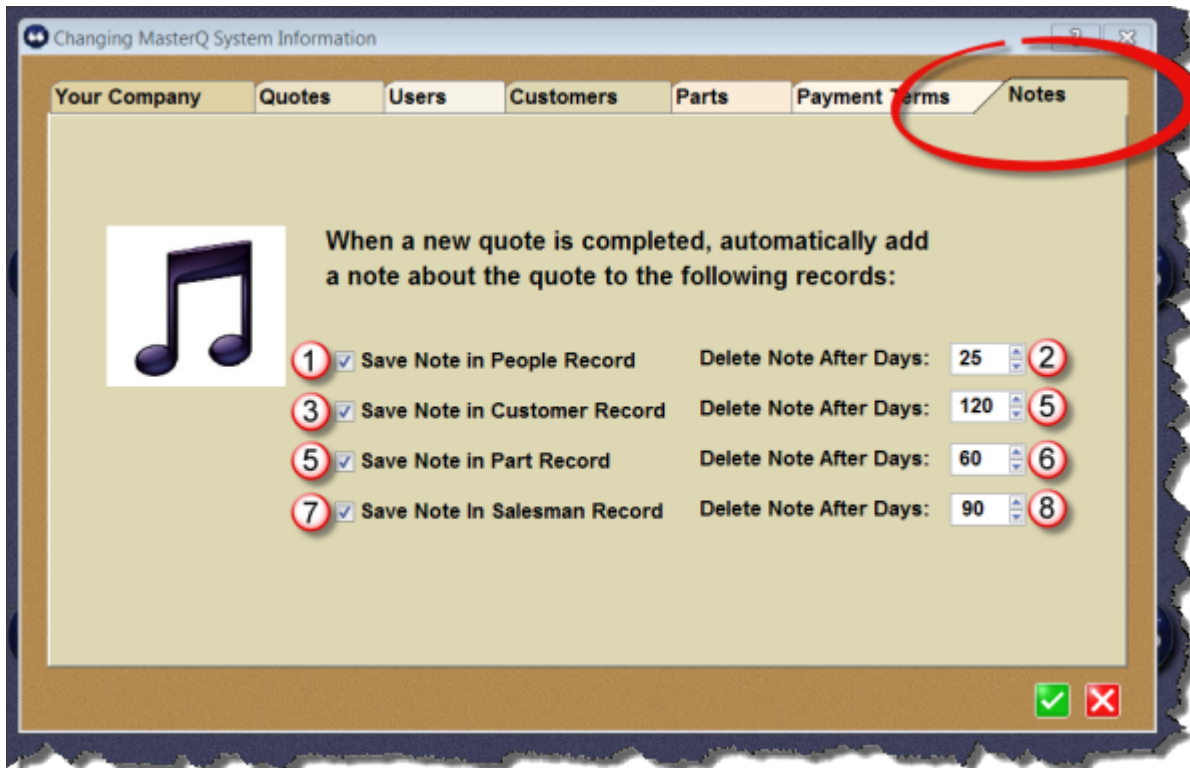
Each time a quote is created, MasterQ has the opportunity to automatically create a note about the quote and attach it to the People, Customer, Part and/or Salesman records. Each of these notes include a button that will quickly open up the related quote for review. The Notes Tab controls which notes 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 not 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.

## Creating the Part Database

---



MasterQ includes Agenda Development's powerful Parts database.

This tool will hold a vast amount of information about the parts you sell. 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 WorkCenter 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.
- 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 large numbers of parts.

On the other hand, if you have a large number of parts 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 parts are found while 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

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

To add a part manually, press the New Part shortcut button



[Next: Adding a Part Record](#)

## Adding a Part Record (New) window



You may add a new part record by pressing the New Part button or by selecting Browse|Parts from the main menu and then pressing the insert key or right clicking the list of parts and selecting the Insert action.

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

1

### 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.





### Alternate Part Number

The alternate number is not printed on quotes. This number might be your vendor's part number.



### First Description Line

This line of text is copied into quotes you create.



### Second Description Line

This line of text is also copied into quotes you create.



### Third Description Line

This extra line of text is not included in quotes you create.



### 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.



### 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.



## Document Shortcuts

These buttons are links to files related to this part. The labels on these buttons are set in the System record and you can define them to be what you require.



## Notes Button

An unlimited number of notes can be attached to each part. This button will display a list of all notes.



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.



## Orders Button

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



## Sales History Button

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



## Quotes Button

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



## Sales "Fries" Button

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



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.



TIP:

The only information required when setting up a new part number record is a unique part 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.

## Creating Part Records by Importing

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.)

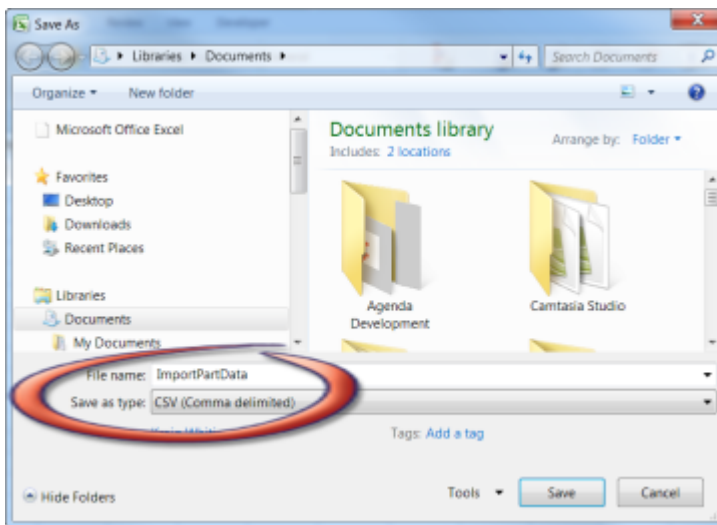
The file should contain the unique part number followed by a comma, and then the description. As the file is processed, MasterQ will check to see if that file exists in your parts database. If it already exists, the entry will be ignored. If it does not exist, a new record will be created.

**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.



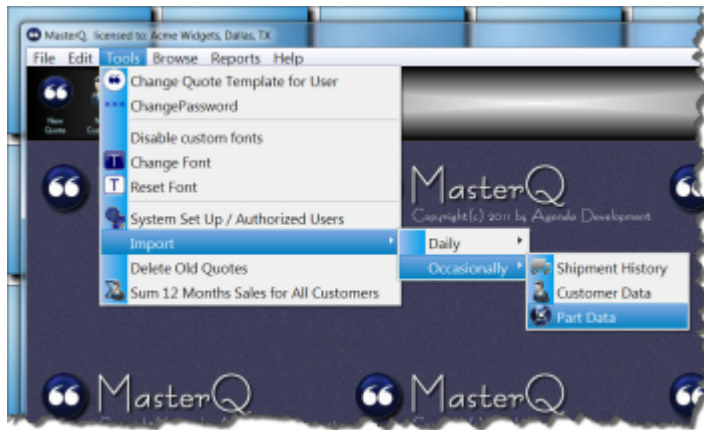
The specific steps for creating the CSV export file will depend upon the software you are exporting *from*. Consult the documentation for that program. The export file for the part data file should contain 2 fields: the part number and the description.

A typical export file might look like this:

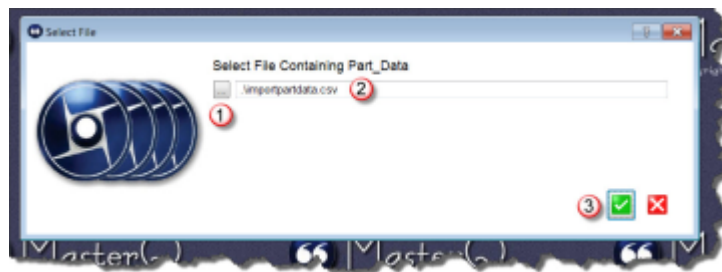
```
001-111,"Widget, Blue"  
001-112,"Widget, Green"  
001-113,"Widget, Purple"
```

### 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.



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.

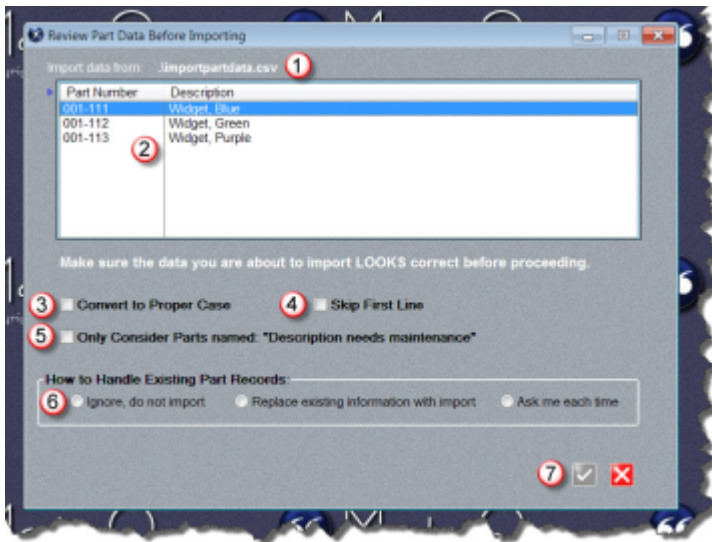


MasterQ will remember the file you choose. If you import this information again in the future, the file you used will be filled in automatically. If you want to use the same file, all you will need to do is press the OK button.



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







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.





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.







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".







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.







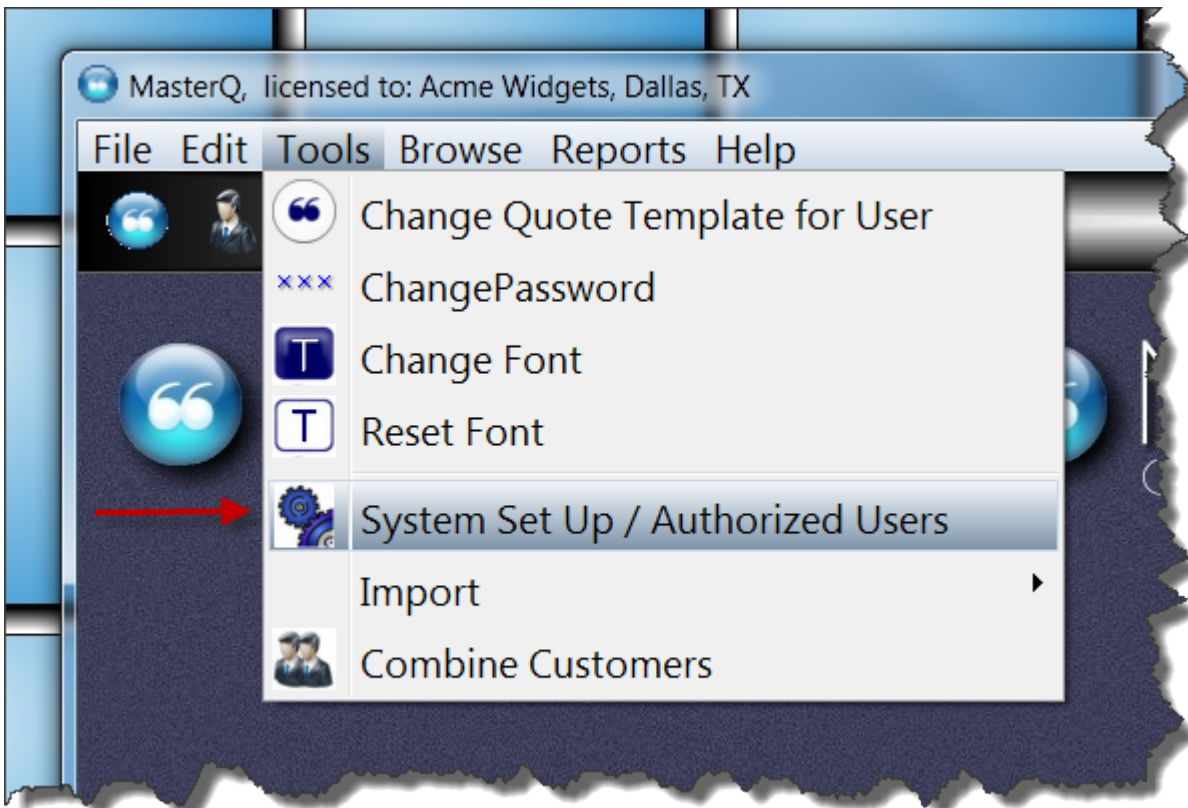


## Creating the System Record

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 from the main menu.



Next:

[Your Company Tab](#)

[Quotes Tab](#)

[Users Tab](#)

[Customers Tab](#)

[Payment Terms Tab](#)

[Documentation Tab](#)

## Creating the Customer Database

---

Your customer database will contain information about each customer. Aside from the 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
- Ship Via information
- Shipment history information
- Current Open Orders (requires Buckets or Workcenter programs)
- Scheduled Drip Marketing Steps (requires MIR program)
- a list of Contacts (People) at the customer



### Before you get started

Take a moment to tell MasterQ how (or *if*) you currently number your customers. For more information see [Telling MasterQ how to number your customers](#).

Of course, you must have customers to generate a quote. You can enter them one at a time as the need arises, or you can import them from your other existing software if this is available.

### Customer records can be created in one of three ways:

1. 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](#).
2. You may optionally [import your sales history](#) into MasterQ. Doing this offers many additional benefits. During the import process, customer records that do not already exist will be created automatically. However, only a minimal record can be created in this manner. You will need to edit the record at some point to supply missing information.
3. You may create customer records directly.



## Telling MasterQ How to Number Your Customers

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First, keep in mind that you do not have to be 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 numbers in other programs, we recommend option 3 below. But please continue reading. This won't take long.

If you use another program which uses customer 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 of SuperUser to edit the system record.

Changing Your Information

MIR Module - Drip marketing      Payment Terms

Your Company    Defaults    Authorized Users    Quote Documentation

Company Name:

Address:

City:

State:       Zip Code:

Serial Number:

Version:

1 Assigning Customer Numbers

2 ☐ User Will Enter New Customer Numbers Individually

3 ☒ Assign PR Numbers to New Customers by Default

☐ Assign New Customer Numbers Automatically

Last Customer Number Assigned:

☒ ☐

1. **User Will Enter New Customer Numbers Individually** - This choice is best when another program assigns and controls your customer numbers. When you create a new customer record, you will enter the number that has been assigned by the other program. If not all of the prospects you quote are set up in the other program, consider option 2 below.
2. **Assign PR Numbers to New Customers by Default** - This option is the best choice when another program controls your customer numbers, but not everyone you quote is set up in the other program (and therefore has a customer number assigned) before a quote is created. In this case, MasterQ will assign a prospect number (in the format of PR0000) to the new customer. Should the prospect become an actual customer (and have a customer number assigned by your other controlling program) later, you can change it to the new number.  
 When assigning PR numbers, MasterQ will start searching for the availability of customer number PR00001. If that number has already been assigned, it will check PR00002 and so on until it finds an unused number. The maximum number of prospects, therefore, is 99,999.  
 Typically, prospects would retain this number until they become actual customers and have a regular customer number assigned by the controlling system. At that time, you can create a new customer record and merge the two accounts into one.
3. **Assign New Customer Numbers Automatically** - If you do use another computer program that assigns customer numbers, we suggest you select option 3. MasterQ will automatically assign a customer number for each new account. These account "numbers" actually consist of letters and numbers, 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 cover 1,089 customers. Three digits will handle 35,937 and if you need it, 4 digits would cover 1,185,921 customers. We'd like to hear if that's not enough.

If you choose option 3, you may also specify the starting customer number. In the screen shot above we have set the last assigned number to A0. So the next assigned number will be A1.

The customer correspondence folder is located in the program where your program is installed.

When a customer number is assigned, a sub-folder is created using that number. All quotes, RGA's, Nafta forms, and other documents created by Agenda Development programs are stored there. You are encouraged to save documents created using other programs in these directories too.

## Importing Customer Data

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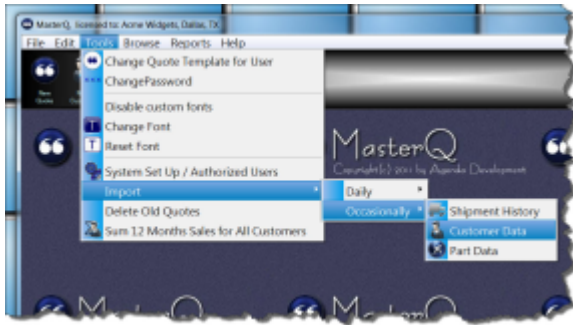


Depending on how many customers you currently deal with, it may be easiest to import your customer data from another program where this information already exists. Of course, this assumes you *have* another system with this information and that the other program has the ability to export customer data.

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).

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](#)

By default, the Customer data being imported will be ignored if the customer already exists in your database.

By default, the customer information will use the same case format as it is imported.

**The customer data CSV file may contain the following information. Only the customer name is required, but adding additional information will save time later.**

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

When you begin importing, you may choose how to handle customers that already exist in your database. You may decide to Ignore (do not add the import information), Replace (all non-blank entries will replace the current customer information), or Prompt (ask the user which data to use).

## Creating Customer Records Directly



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)

### 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.)

### 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: [Entering or Changing Customer Information](#)

## Entering or Changing Customer Information



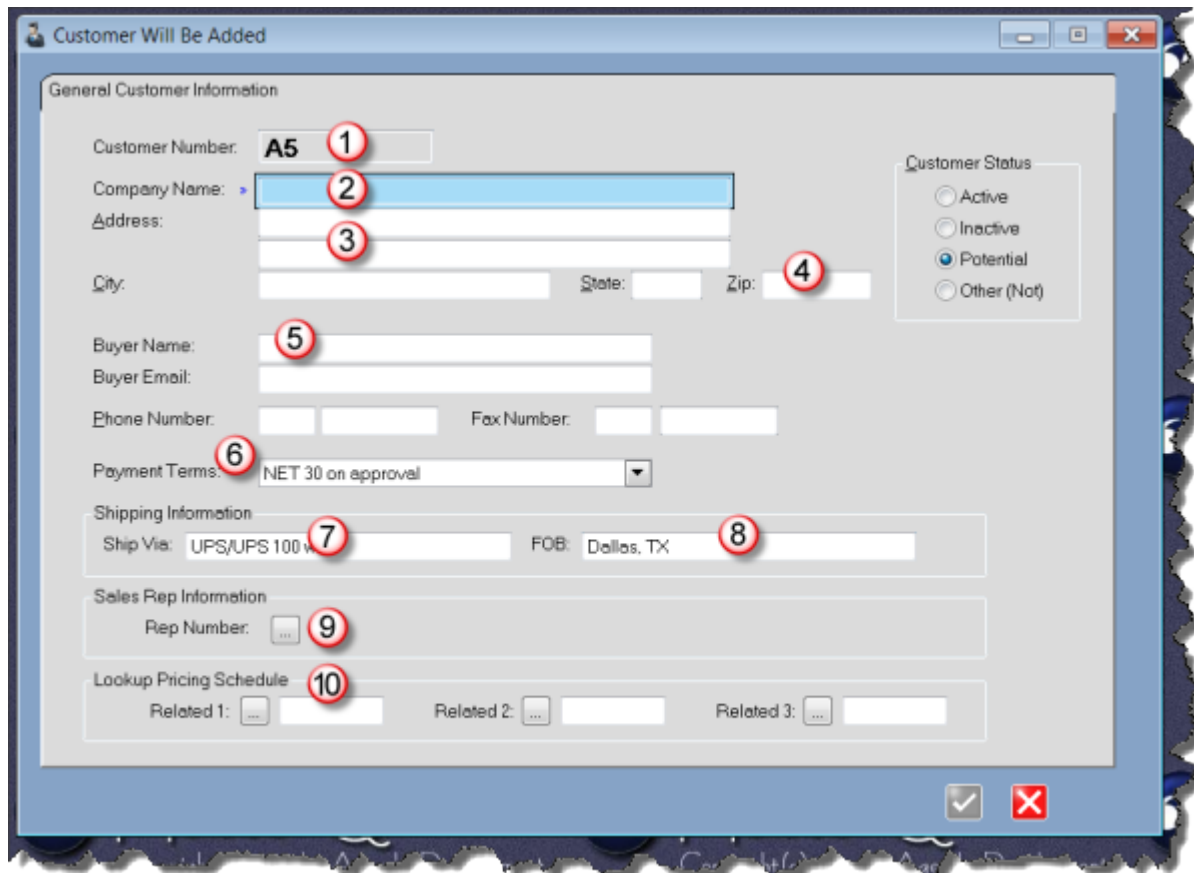
Information about your customers is kept in a special database.

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.)



The screenshot shows a software window titled "Customer Will Be Added" with a "General Customer Information" tab. The form contains the following fields and sections:

- Customer Number:** A5 (1)
- Company Name:** (2)
- Address:** (3)
- City:** (4)
- State:** (4)
- Zip:** (4)
- Customer Status:** Radio buttons for Active, Inactive, Potential (selected), and Other (Not).
- Buyer Name:** (5)
- Buyer Email:** (5)
- Phone Number:** (5)
- Fax Number:** (5)
- Payment Terms:** NET 30 on approval (6)
- Shipping Information:**
  - Ship Via:** UPS/UPS 100 (7)
  - FOB:** Dallas, TX (8)
- Sales Rep Information:**
  - Rep Number:** (9)
- Lookup Pricing Schedule:**
  - Related 1:** (10)
  - Related 2:** (10)
  - Related 3:** (10)

At the bottom right of the form are checkmark and X icons.

	<b>Customer Number</b> - depending on the <a href="#">options</a> you have set, MasterQ may set the customer number for you automatically. You may change this number if you choose.
	<b>Company Name</b> - or customer name if you sell to individuals. This name should be unique but does not have to be.
	<b>Address, City State</b> - This is the default address that will be used for quotes.
	<b>Zip Code</b> - The postal code is entered before the city & state. MasterQ will look up the city & state and fill them in automatically for you.
	<b>Buyers Name &amp; Email</b> - Quotes will default to this person, but you can select from anyone you know at the customer. Of course, you can add new names too.
	<b>Payment Terms</b> - Select from any of the <a href="#">payment terms</a> you have set up. The entry you specified as the <a href="#">system default payment terms</a> when you set up the system record will be used initially for new customers.
	<b>Ship Via</b> - The <a href="#">default Ship Via</a> you specified in the System file is used when you create a new customer, but of course it can be changed.
	<b>FOB</b> - The <a href="#">default FOB</a> you specified in the System file is used when you set up a new customer, but of course it can be changed.
	<b>Sales Rep</b> - Press this button to select a salesperson from the list of <a href="#">sales people</a> you have set up.
 	<b>Look Up Pricing</b> - 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 <a href="#">here</a> .

Next: [Changing an Existing Customer Record](#)



## Look Up Pricing

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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 "number" of 'Retail' or 'OEM' or 'Distributor' or any other descriptive name you wish. Create a quote for that "customer" for all of your parts. Then put the appropriate 'number' 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.

## Changing an Existing Customer Record

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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 of 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.



## Creating the Salesman Database

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### Who can create a Salesman record?

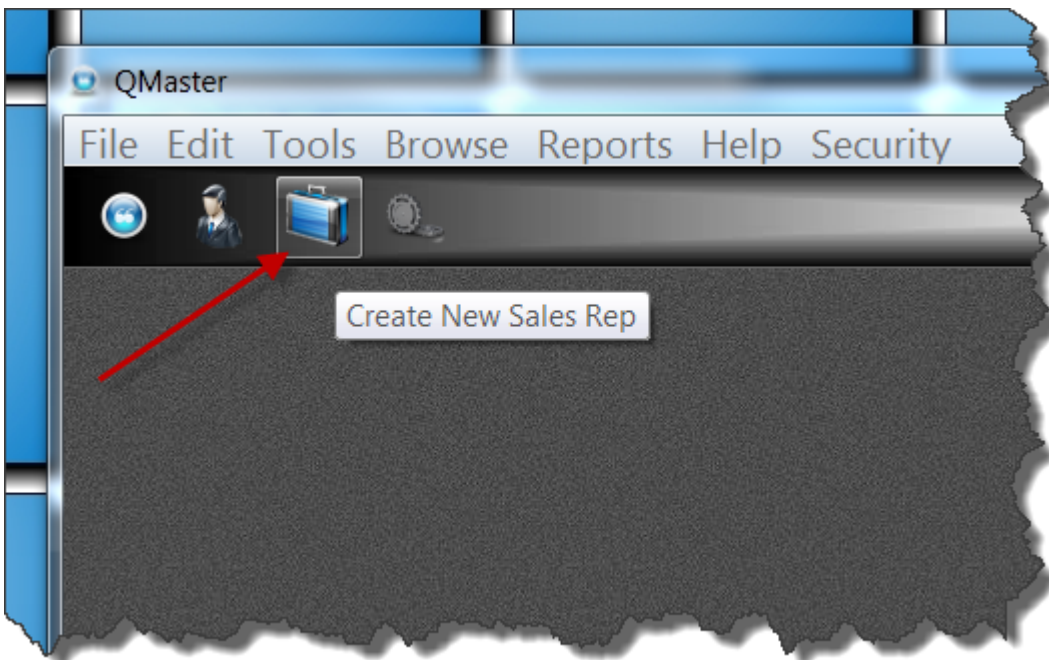
To create a new salesman record your user account must have the Edit Sales Rep box checked, or your user record must show that you are a super user of MasterQ Manager. (Other Agenda Development programs may also give access to these features in *their* user set-up procedures.)

### 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.

Record Will Be Added (New)

General Info   Quotes   Customers

Salesman Number: 16

Name: » [Yellow Highlighted Field]

Address: [Field]

City: [Field]

State: [Field]   Zip: [Field]

Phone: [Field] [Field]

Fax: [Field] [Field]

Email Address: [Field]

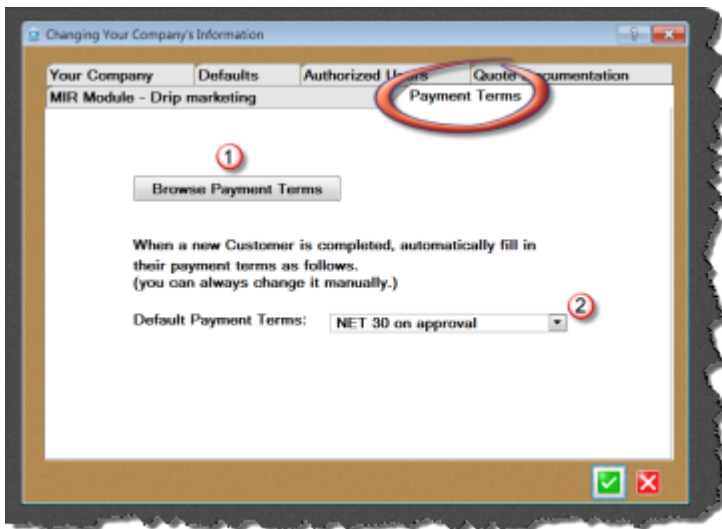
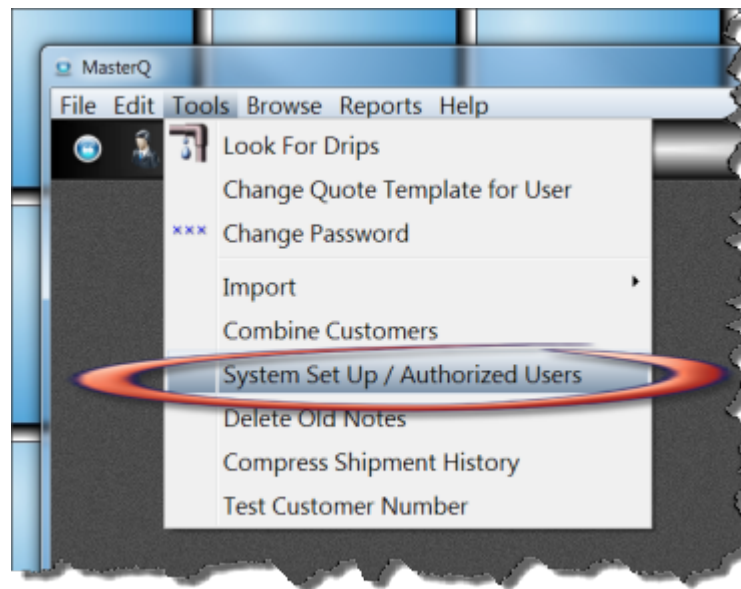
☐ Active Salesman

[Green Checkmark] [Red X]

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

## Setting Up Payment Terms

To modify the payment terms, select **TOOLS | SYSTEM SET UP | AUTHORIZED USERS** from the main menu.



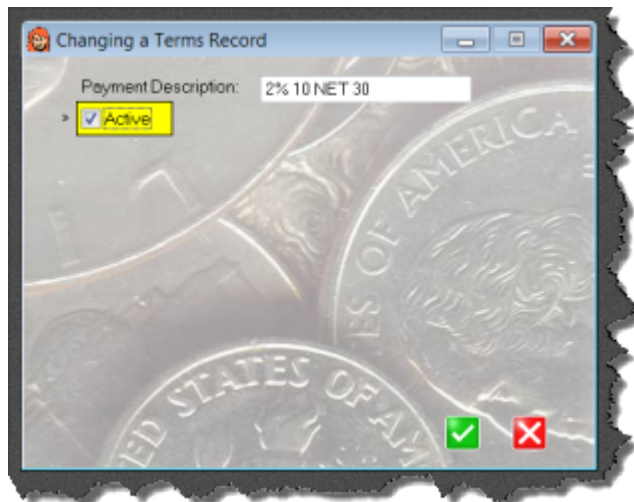
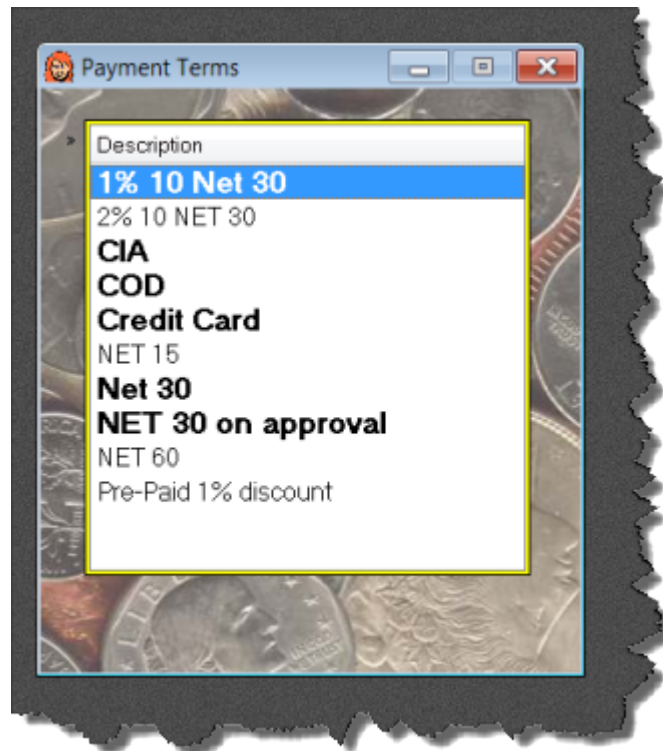
Then click on the Payment Terms tab.

1. **Browse Payment Terms** button displays a list of the payment terms you have created.
2. **Default Payment Terms** selects the payment term that is pre-selected when you create a new customer. (You can always change it for each customer or for each individual quote later.)

1. **Browse Payment Terms** button displays a list of the payment terms you have created.
2. **Default Payment Terms** selects the payment term that is pre-selected when you create a new customer. (You can always change it for each customer or for each individual quote later.)

Pressing the Browse Payment Terms button will display the terms you have previously defined. The 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.



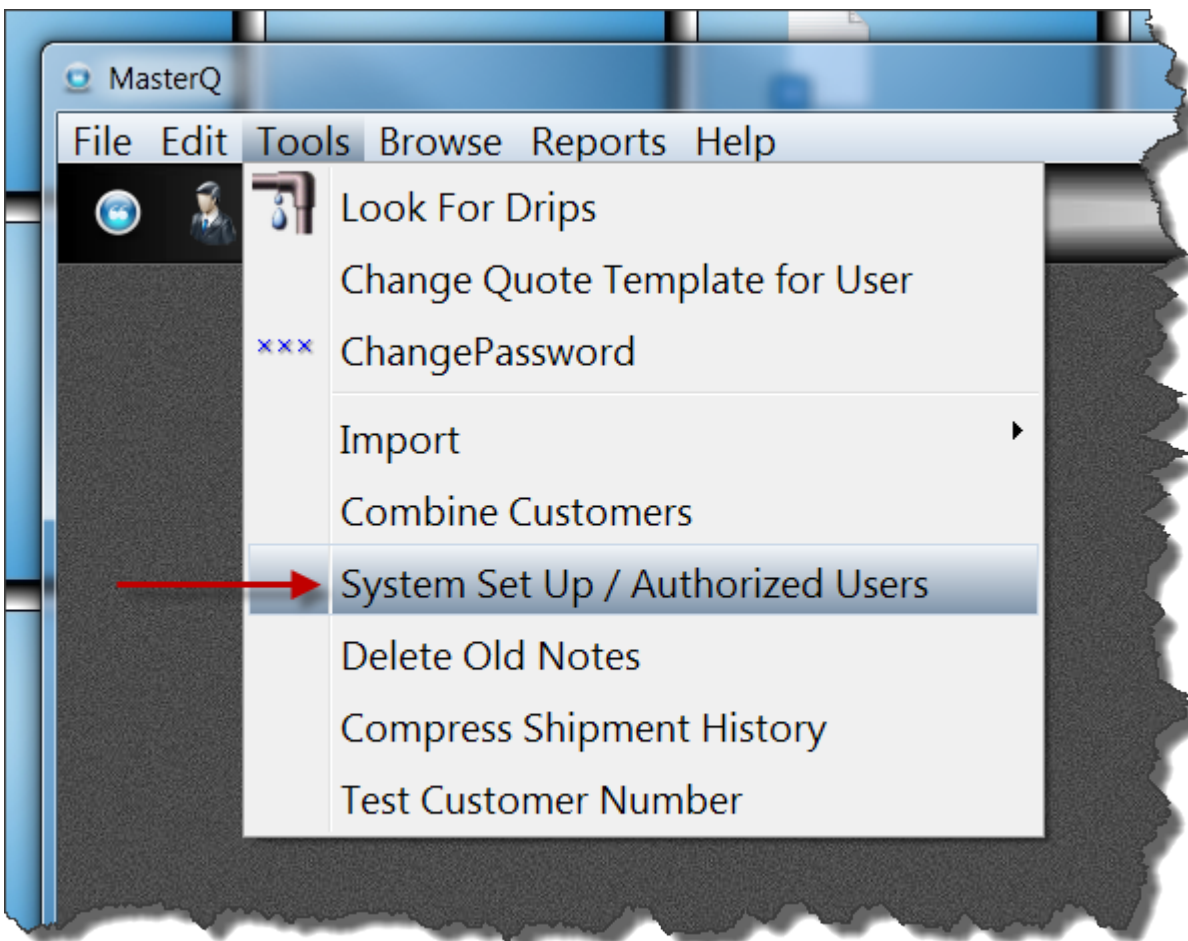
TIP: Why would you choose *not* to make a Payment Term active?

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.

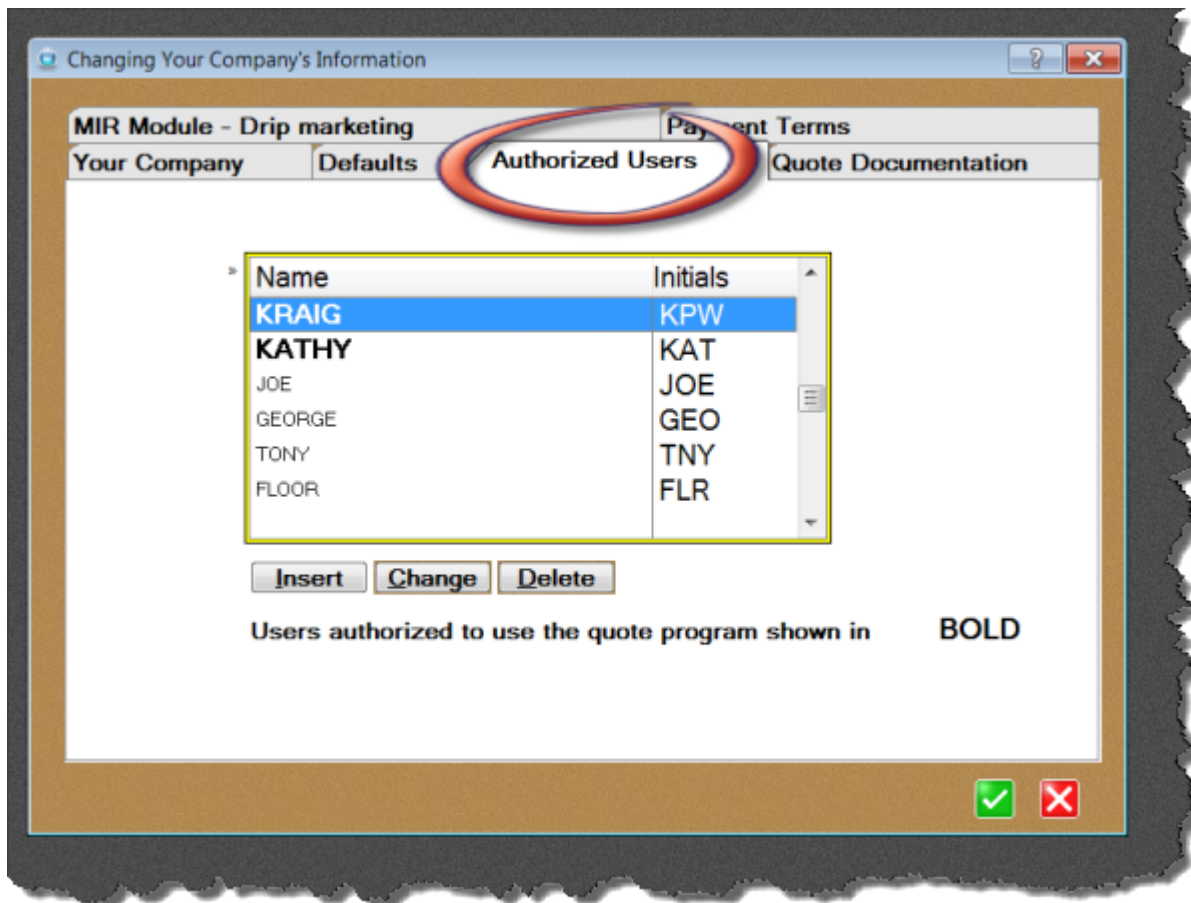
## Setting Up Users

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.



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 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.

### Edit User Record



Changing a Users Record

MasterQ User Record and Permissions

MIR - Drip Marketing

User Name: 1 KRAIG

Initials: 2 KPW

Password: 3 [Masked]

User Permissions: 4

☒ QMaster Program Access

☐ View Quotes Only 5

☒ Create New Quotes 6

Default Quote Template: 7

[File Selection] \\QuoteKPW.doc

8 ☒ QMaster Manager

9 ☒ Edit Customer Records

10 ☒ Edit Payment Terms

11 ☒ QMaster Super User

12 ☒ Edit Sales Reps

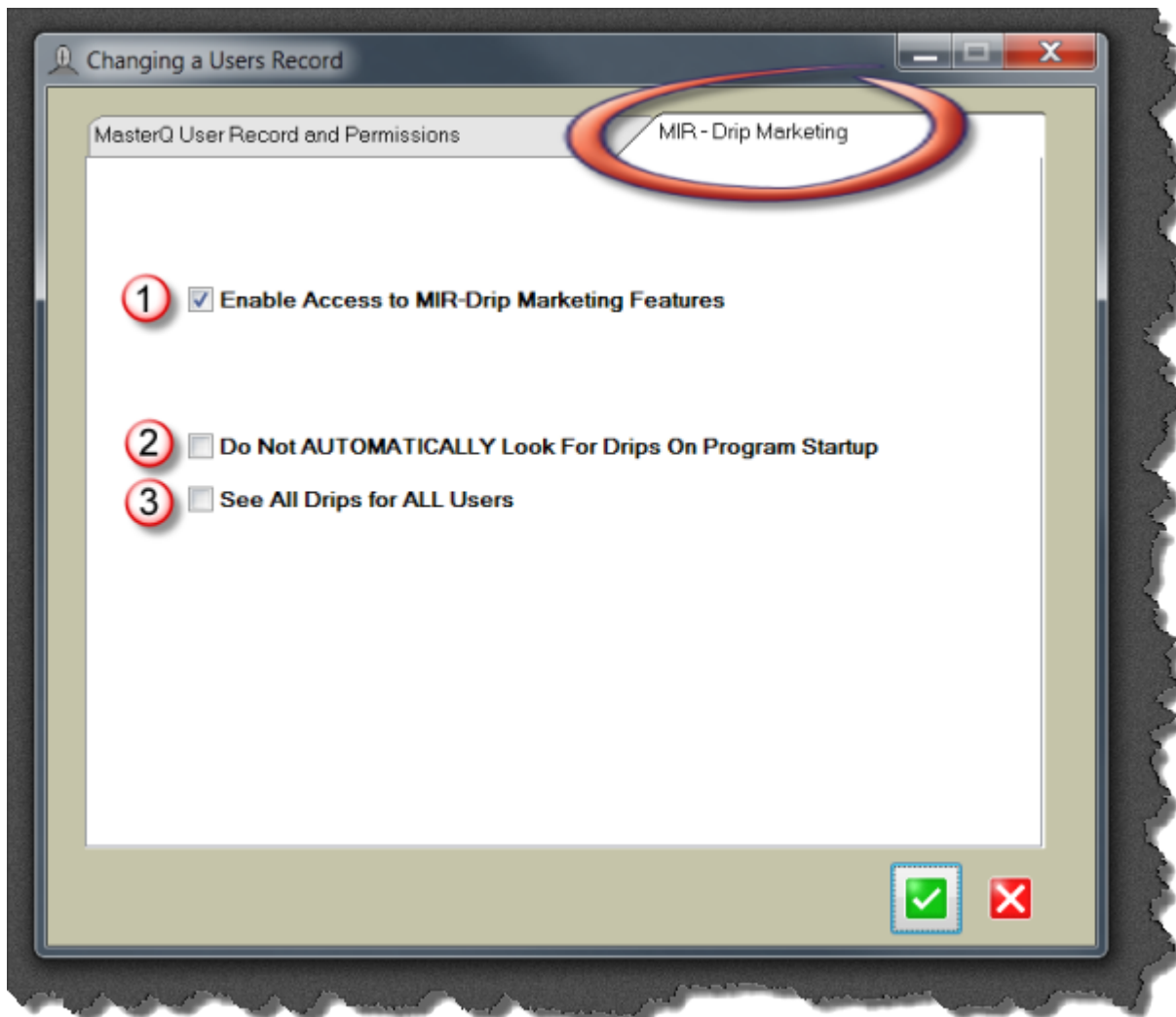
13 ☒ Edit Parts Records

[Green Checkmark] [Red X]

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
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.



- 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. **MasterQ Super User** - Super users can modify many aspects of the program that are not enabled even for MasterQ managers.
- 12. **Edit Sales Reps** - Check this box to enable the user to create salesman records.
- 13. **Edit Part Records** - Checking this box allows the user to create new part records.

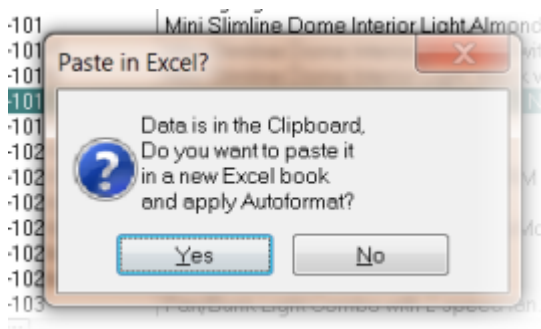
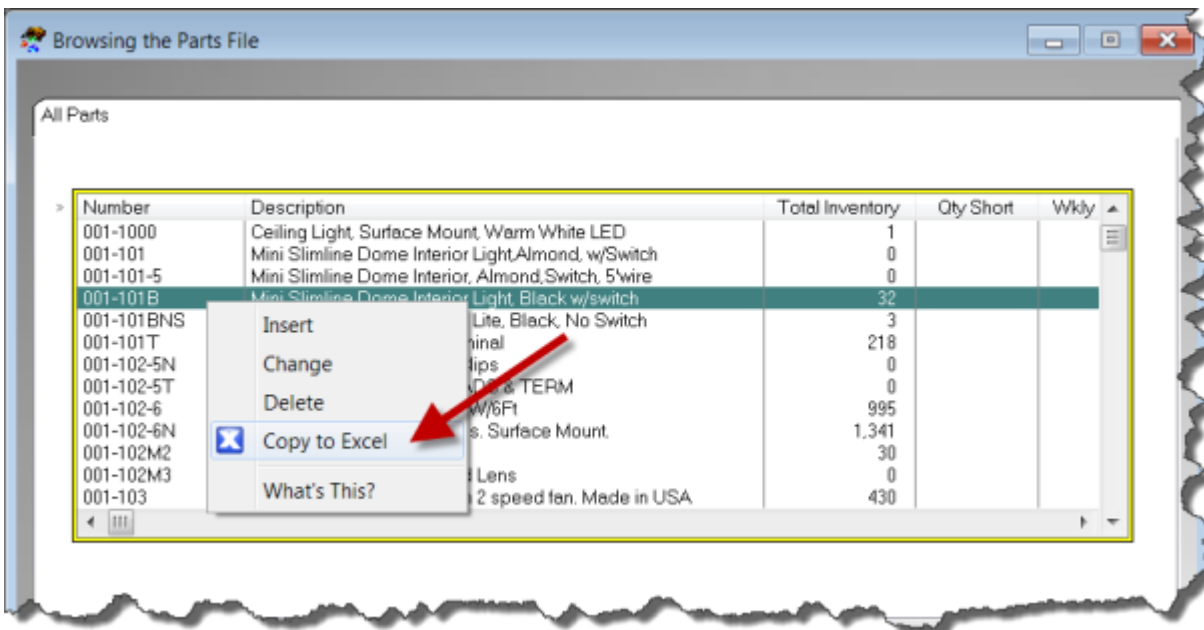


NOTE: The MIR - Drip-Marketing tab only appears if you have the MIR module installed. For more information, visit our [website](#)

1. **Enable Access to MIR-Drip Marketing Features** - Check this box to allow the user to use the drip marketing features.
2. **Do not AUTOMATICALLY Look for Drips on Program Startup** - If box is unchecked, the program will automatically look for scheduled follow up marketing steps each time. Unchecking the box will require the user to specifically ask for pending drips.

## Exporting a Browse Table

Most information in Agenda Development software is displayed in scrolling browse tables. 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

Clipboard Font Alignment Number Styles Cells Editing

A1 Browsing the Parts File

	A	B	C	D
1		Browsing the Parts File		
2				
3	Number	Description	Total Inventory	Qty Sh
4	001-1000	Ceiling Light, Surface Mount, Warm White LED	1	
5	001-101	Mini Slimline Dome Interior Light,Almond, w/Switch	0	
6	001-101-5	Mini Slimline Dome Interior, Almond,Switch, 5'wire	0	
7	001-101B	Mini Slimline Dome Interior Light, Black w/switch	32	
8	001-101BNS	Mini Slimline Dome Interior Lite, Black, No Switch	3	
9	001-101T	Mini Slimline Dome w/Terminal	218	
10	001-102-5N	Snap-On Light W/5Ft. No Clips	0	
11	001-102-5T	SNAP ON LIGHT W/5' LEADS & TERM	0	

Sheet1 Sheet2 Sheet3

Ready Average: 5286.823032 Count: 17284 Sum: 58763038 100%

## Filtering a Browse Table

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

### Query Center



Column	Operator	Value/Expression	Connecting Operator
▼			DONE

Reset Save Save As Load Query Apply

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.

### Query Button

Other times, a simpler, but less comprehensive method of filtering is offered by the Query button.

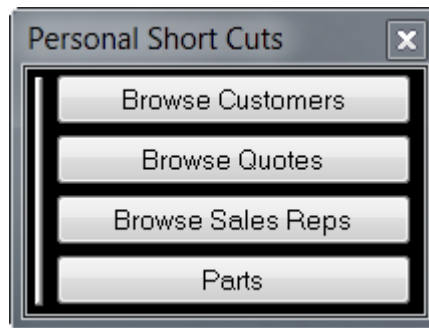
## Personal Shortcut Menus

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.

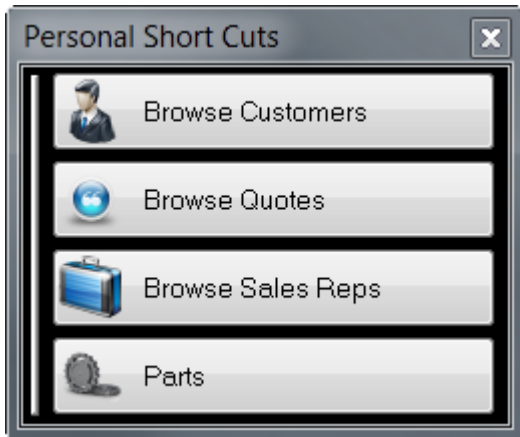
### Creating a new short cut...

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...

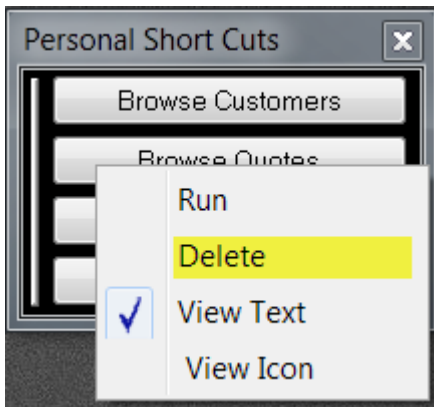


Many menu commands have icons associated with them. To display these icons on your short cut menu, right click any one of the displayed short cut buttons and select View Icon. Icons, if available, will be enabled for all of your buttons.

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.



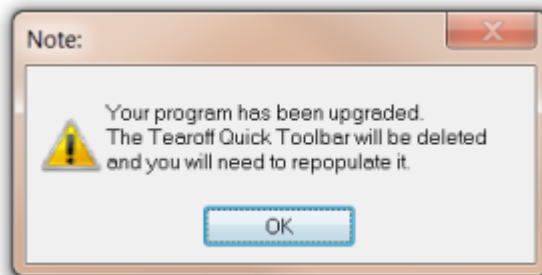
## Permanently Remove All Short Cuts...

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 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 may 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.



Video instructions: Click [here](#)

**check video link**



## 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, or to automatically be displayed anytime the object is selected, or a combination of the two. These notes can include a paragraph description explaining the and can also link to another document (such as a Word document, an Excel spreadsheet, an audio or video file, etc) for unlimited capabilities.



The Notes button is located in the lower left corner of each object record. If notes exist 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 features 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.

The screenshot shows a window titled "Adding a Customer Note". It contains the following fields and controls:

- 1** Pre-assigned Customer Number: A1011
- 2** Title of note: A text input field.
- 3** Date note was created: 1/15/11
- 4** Time note was created: 5:08PM
- 5** User's initials: KPW
- 6** Calendar look up button: A small calendar icon.
- 7** Calendar Date Selection: A date input field.
- 8** Date to remind User about note: A date input field.
- 9** Date to Erase this note: A date input field.
- 10** Private feature: A checkbox labeled "Private".
- 11** Must View feature: A checkbox labeled "Must View".
- 12** Notes: A large text area for the note content.
- 13** Select related file: A button labeled "Select Related File".
- 14** View Related File button: A button labeled "View Related File".
- 15** Clear selected file: A button labeled "Clear Selected File".
- 16** Abandon changes: A green checkmark button.
- 17** Save changes: A red X button.

### 1 Pre-assigned Customer Number

A1011

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

1/15/11

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

### 4 Time note was created

5:08PM

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

5

**User's initials**

KPW

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**

0/00/00

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**

0/00/00

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**
☐ Private

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**
☐ Must View

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.

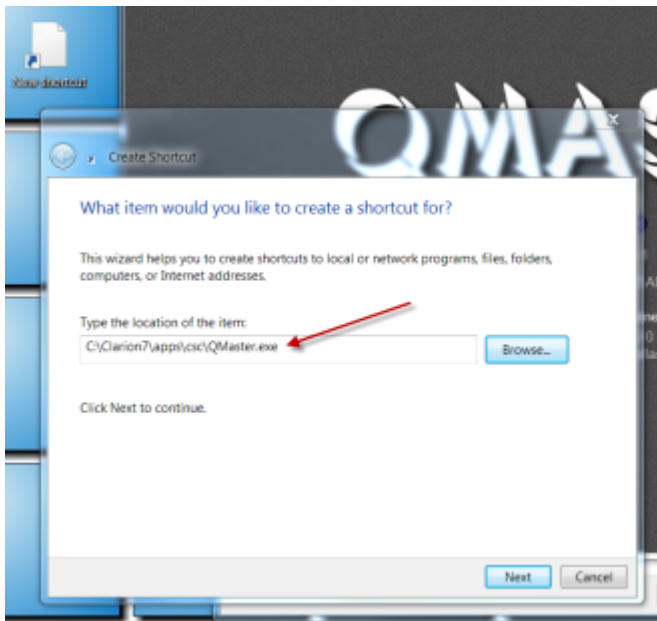
## Security

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 directory where people with access to your computer network may have access.

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 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.



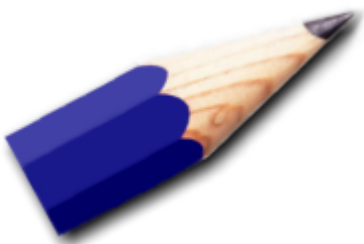
Create a new shortcut on your desktop by right-clicking the desktop and choosing NEW | SHORTCUT. Use the BROWSE button to navigate to where your Agenda Development programs are installed and double click on the MasterQ.EXE program.

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. 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 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.

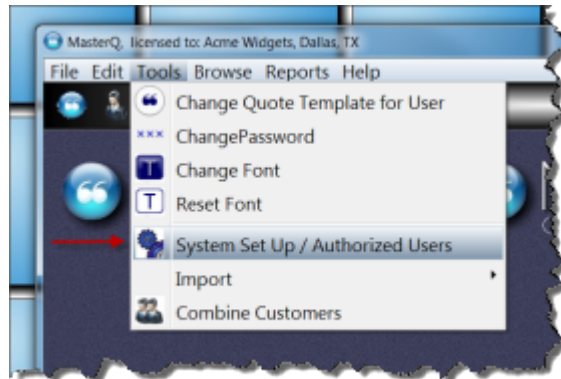


TIP: If your computer is reasonably secure, starting MasterQ with the command line password is a real time saver!

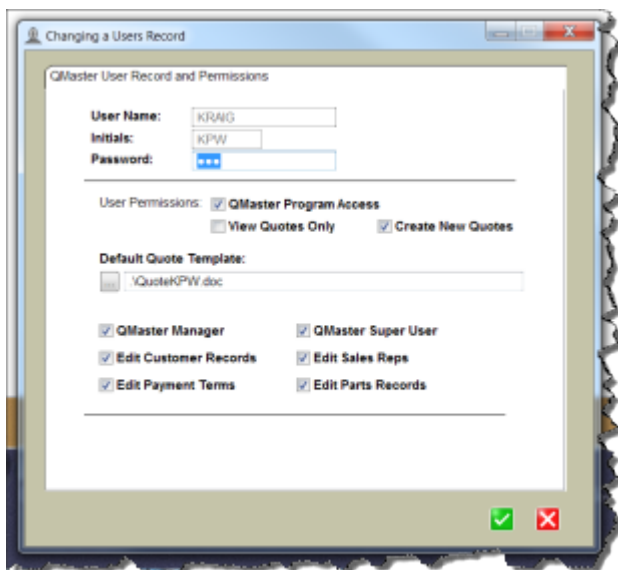
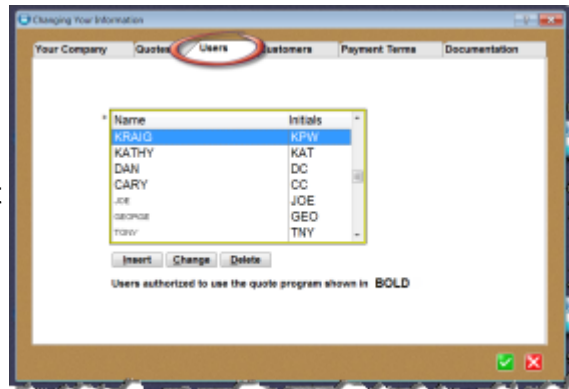
## Changing the User's Password

### 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**.

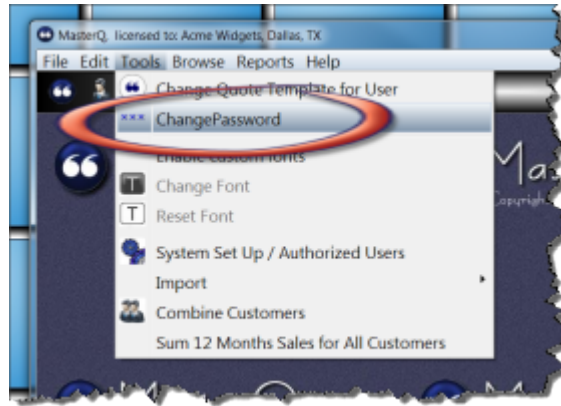


The new user password may be entered here. Once saved, the new password is available for the user to use.

## How to change your own password

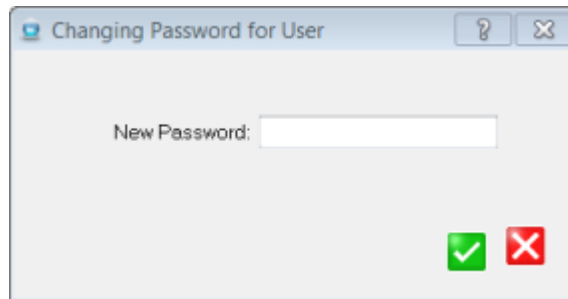
Occasionally a user may wish to change their password. This can be done by the user without assistance from a super user.

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.

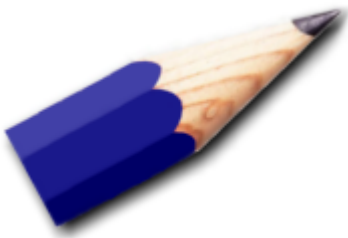
## Logging In

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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.

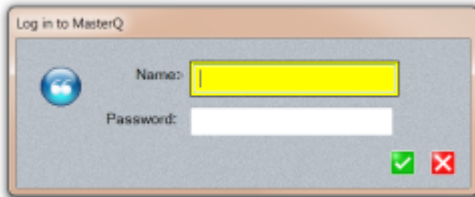


TIP: There are many advantages to giving each user their own log on name and password. Using passwords is highly recommended.

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

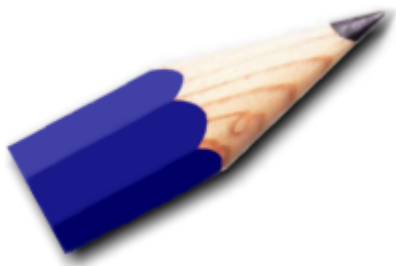
---

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.



### TIP:

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

## Importing Shipment History

---

Importing customer's shipment history is an optional step that offers many advantages to users of Agenda Development software. Once imported, you can:

- **Be automatically advised *if* a customer is already purchasing the item being quoted and what price they paid most recently.**
- **Be automatically advised if a related customer is already purchasing the item being quoted and what price *they* paid most recently.**
- View graphs of your sales to better understand demand.
- Quickly examine a customer's 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

### 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).
3. Your customer numbers used in your *other* program must be the same customer numbers you use in QMaster

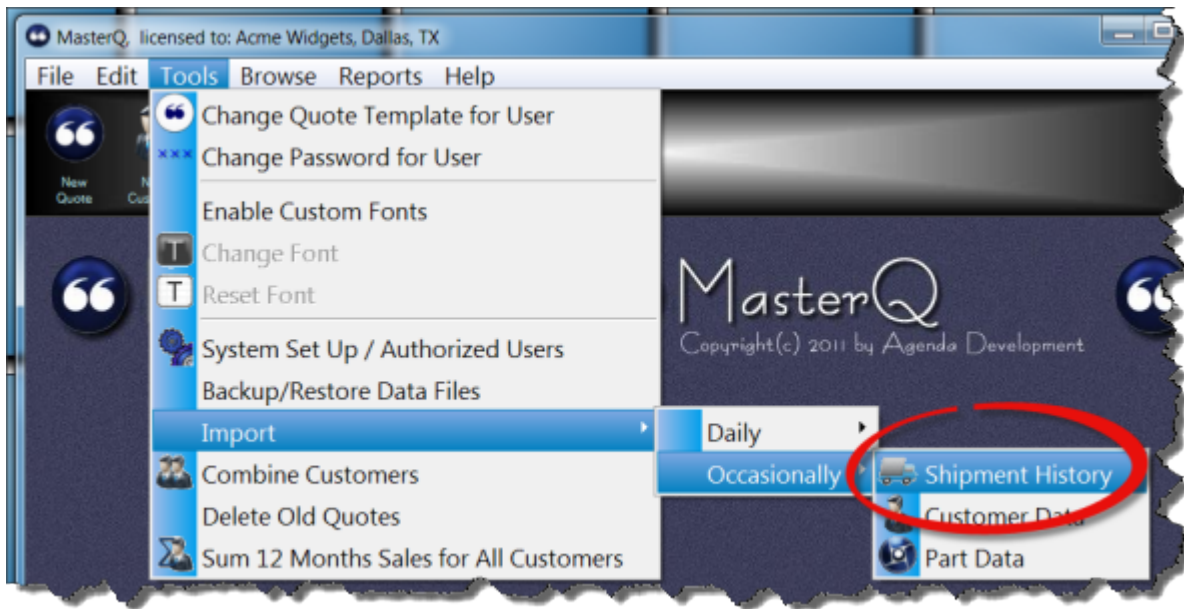
NOTE: If you do not currently use another program for order entry functions, contact Agenda Development for options.

### Steps required:

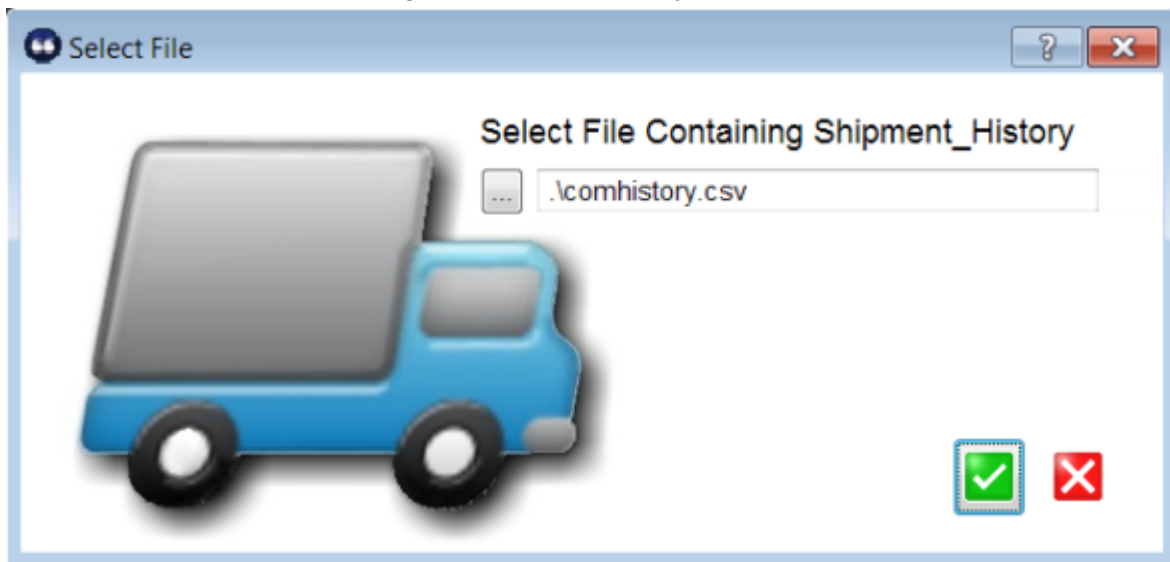
Using your other program, export a CSV file containing the following fields in the order listed below:

- 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

- Start the import process:

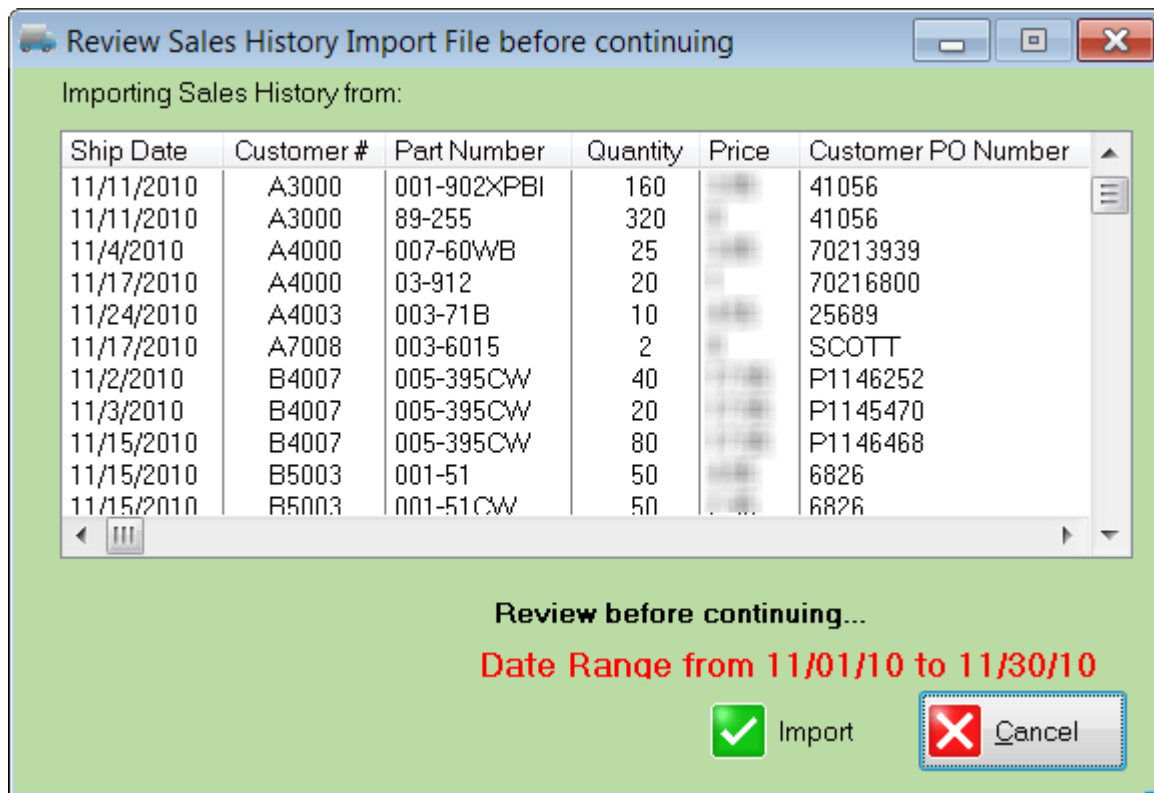


- Select the file containing the shipment history to import:



- review contents for proper format using the review window:





The dialog box has a title bar with a close button (X) and a maximize button. The main area has a green background. At the top, it says "Importing Sales History from:". Below this is a table with 6 columns: Ship Date, Customer #, Part Number, Quantity, Price, and Customer PO Number. The table contains 14 rows of data. Below the table, it says "Review before continuing..." in bold. Underneath that, in red text, it says "Date Range from 11/01/10 to 11/30/10". At the bottom right, there are two buttons: "Import" with a green checkmark icon and "Cancel" with a red X icon.

Ship Date	Customer #	Part Number	Quantity	Price	Customer PO Number
11/11/2010	A3000	001-902XPBI	160		41056
11/11/2010	A3000	89-255	320		41056
11/4/2010	A4000	007-60WB	25		70213939
11/17/2010	A4000	03-912	20		70216800
11/24/2010	A4003	003-71B	10		25689
11/17/2010	A7008	003-6015	2		SCOTT
11/2/2010	B4007	005-395CW	40		P1146252
11/3/2010	B4007	005-395CW	20		P1145470
11/15/2010	B4007	005-395CW	80		P1146468
11/15/2010	B5003	001-51	50		6826
11/15/2010	B5003	001-51CW	50		6826

**Review before continuing...**

**Date Range from 11/01/10 to 11/30/10**

 Import  Cancel

- 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

## FAQ's - Frequently Asked Questions

---

### System Requirements

#### 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.

## Quote Templates

### 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](#)

## 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

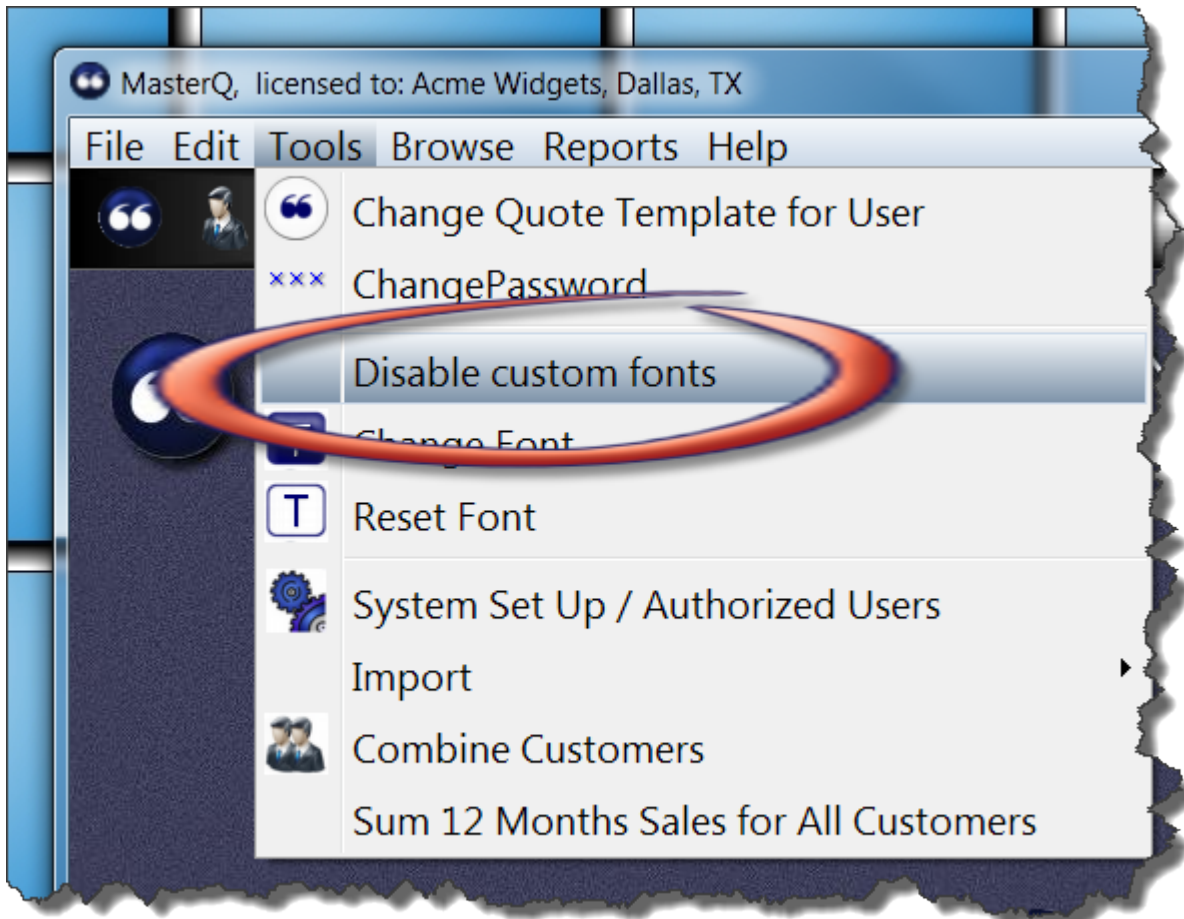
### Sometimes there is a delay when starting the program. Most times not. Why?

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.

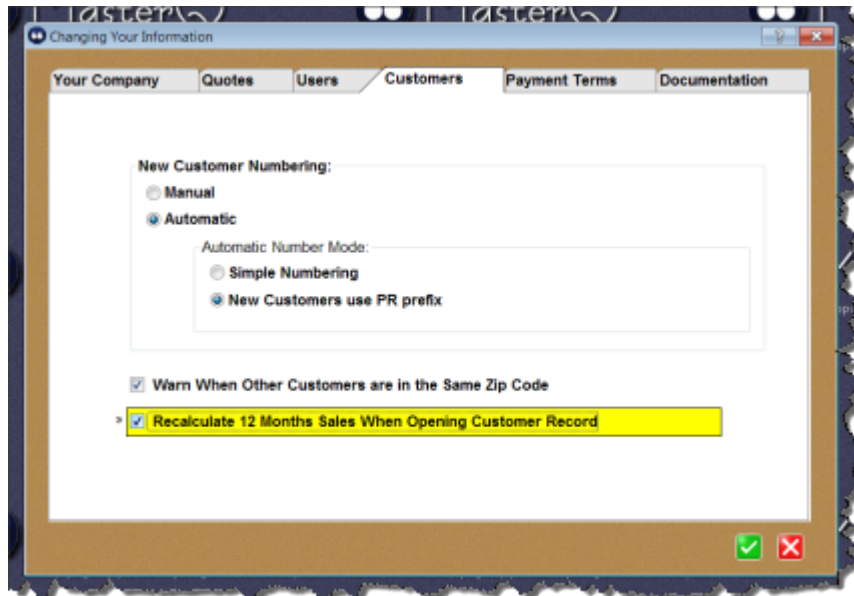
Using custom fonts might slow the program down a bit. You can disable the custom fonts from the main menu if you prefer to give up these features.



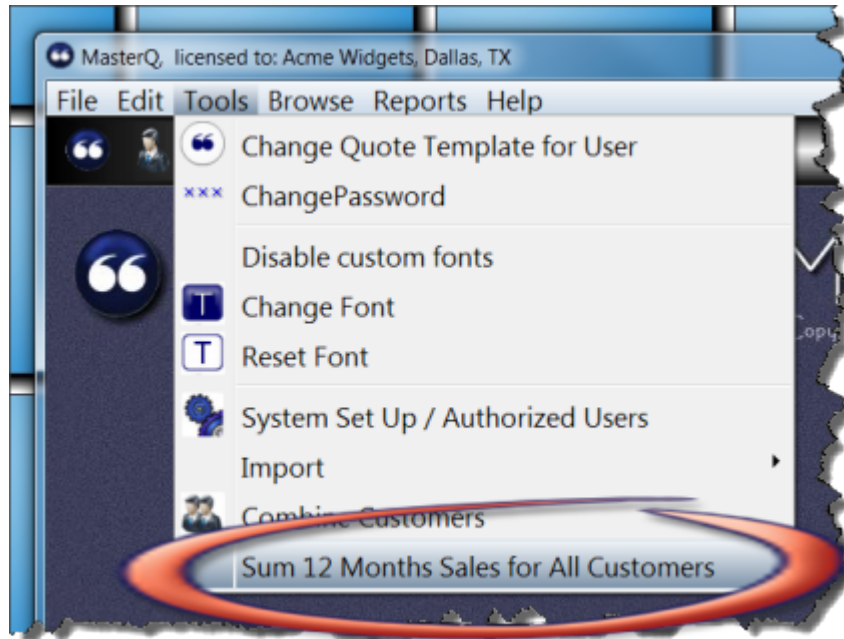
MasterQ automatically re-calculates the customer's 12 months previous sales when the customer window is opened. This can cause a slight delay. You may choose to calculate the 12 month sales history for all customers at one time, but only when you specifically ask for the update. This will speed up the 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.



## 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

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You may choose to optionally import customer shipment records into MasterQ. While this can be very beneficial, in certain circumstances 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 in *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?** 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.





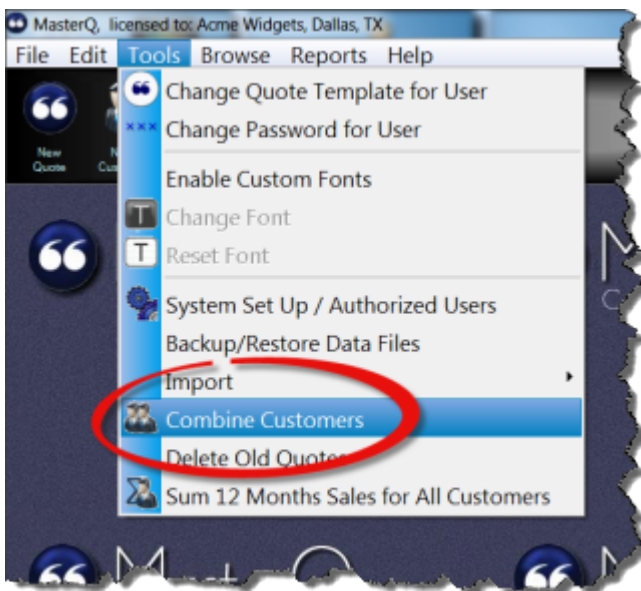
## Combining Customers




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 .

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**.

Combine Two Customer Records

Customer to Erase:

A1003 **1**

Aboriginal Fiberglass  
R.2 #2 Hwy.  
Auburntown TN 37016

**3** ☐ Use This Address, Phone, etc

Combine with Customer Number:

PR00195 **2**

Jones Widget Co., Inc.  
P.O. Box 288  
Kanaranzi MN 56146

☒ ☐

All quotes, prices, shipment histories, contacts and notes will be merged into the customer number you have specified in **2**.

## Deleting Old Quotes

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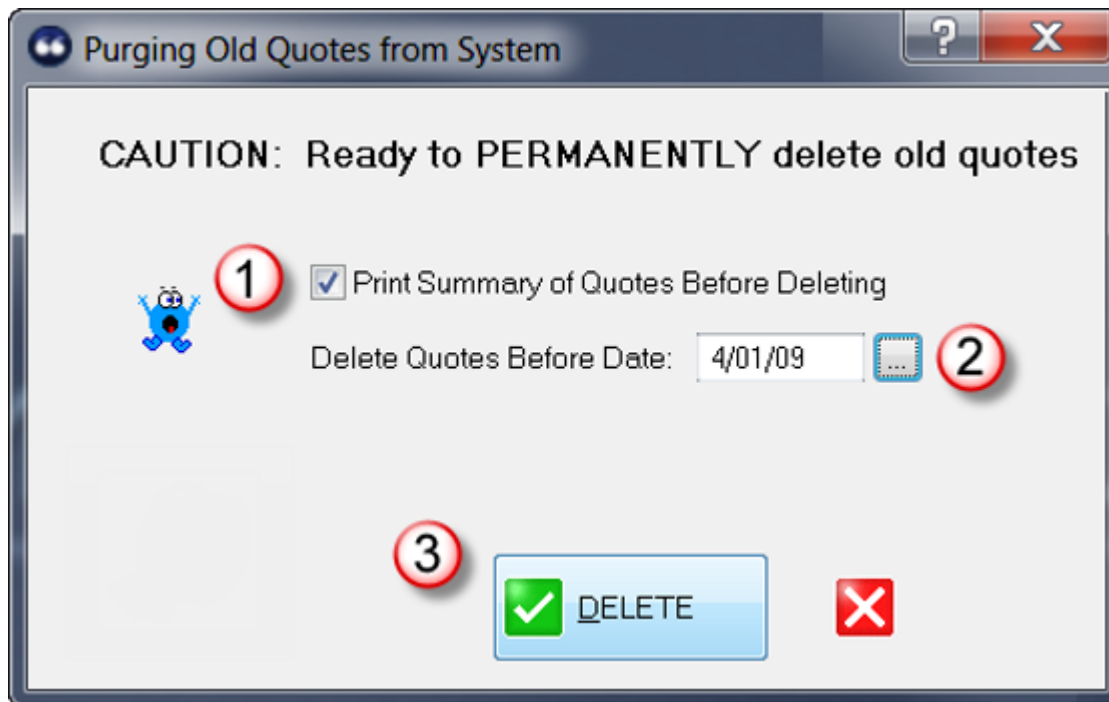
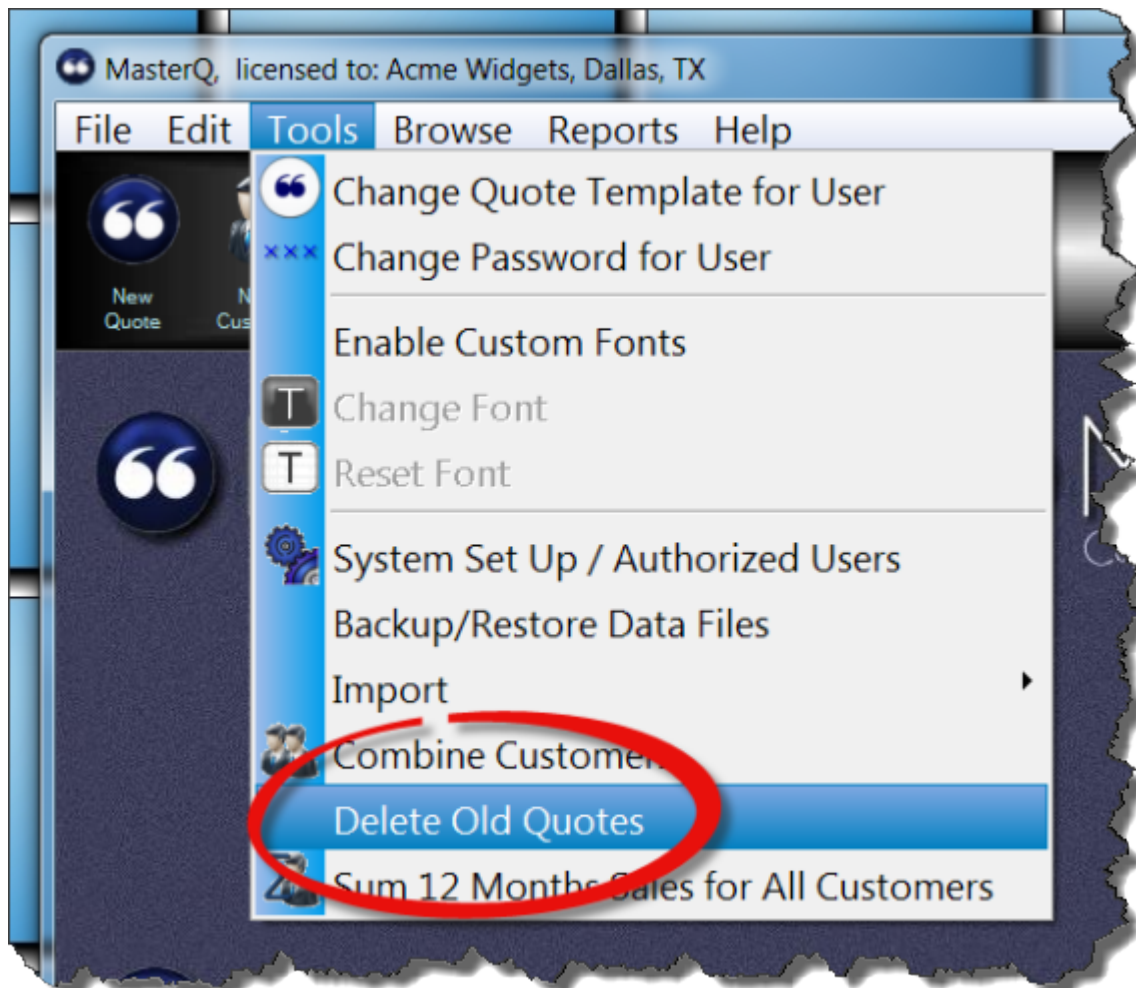
At some point you may decide to remove old outdated quotes from the system. When the browsing quotes takes longer than you would like, consider this option.

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.



1

Print Summary of Quotes Before Deleting. If checked, will allow you to print a summary of the quotes you are about to remove.

2

Enter the cut off date. Quotes before this date will be removed.

3

Remove quotes as requested.



## Quote Templates

---

### Introduction to Quote Templates

The Quote Template is a Word document that is used to create new quotes. Think of it as intelligent stationery. The template consists of the design details of your quote, such as your 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. When a quote is created using MasterQ, the Quote Template is the starting point.

### Quote Templates are Totally Flexible

Any format or design detail that you can implement in Microsoft Word can be used as the basis for your quotes. The template can contain graphics (such as your company logo or perhaps a scanned copy of your signature). In addition to the items being quoted, you can insert Tokens into the quote template. When a quote is created, these tokens are replaced with the appropriate values from the quote or customer record.

### Each User Can use the Same Quote Template if you wish

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.

### or, Each User Can Have a Unique Quote Template

See how to specify a different Quote Template for the user - [click here](#).

### 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

### Quote Template Substitutions

When a quote is generated, tokens found in the 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 and 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.

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.

#### Can each User have their own unique Quote Template?

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?

There is no practical upper limit.

#### 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. 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.

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. Highly recommended.

\* CutePDF is a trademark of Acro Software and is not affiliated with Agenda Development.

[www.CutePDF.com](http://www.CutePDF.com)

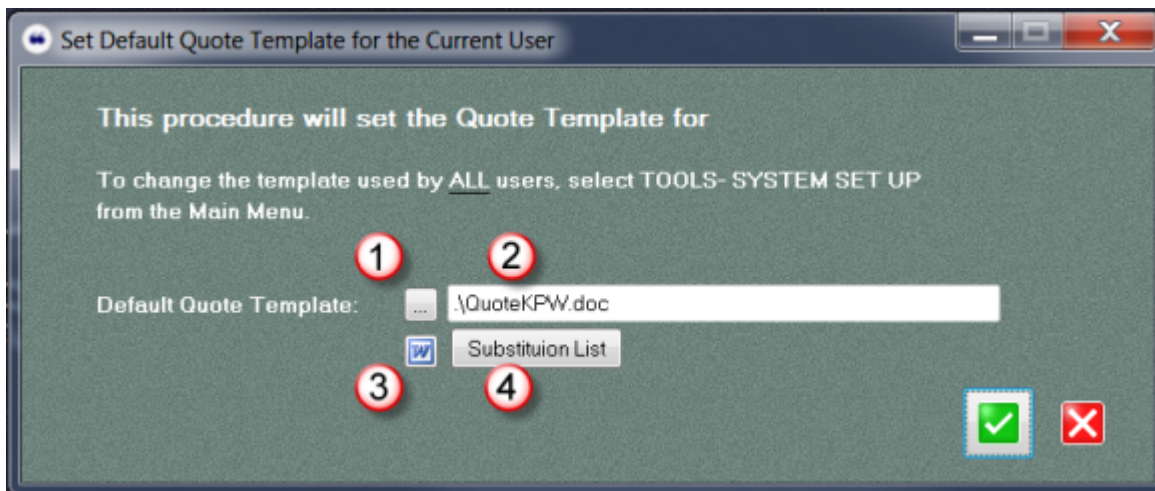
The template can be modified by you design any quote form you require.

## Setting the Default Quote Template for Single User

The 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.



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



- 1 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.



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](#).

## Fries: Up-Selling System



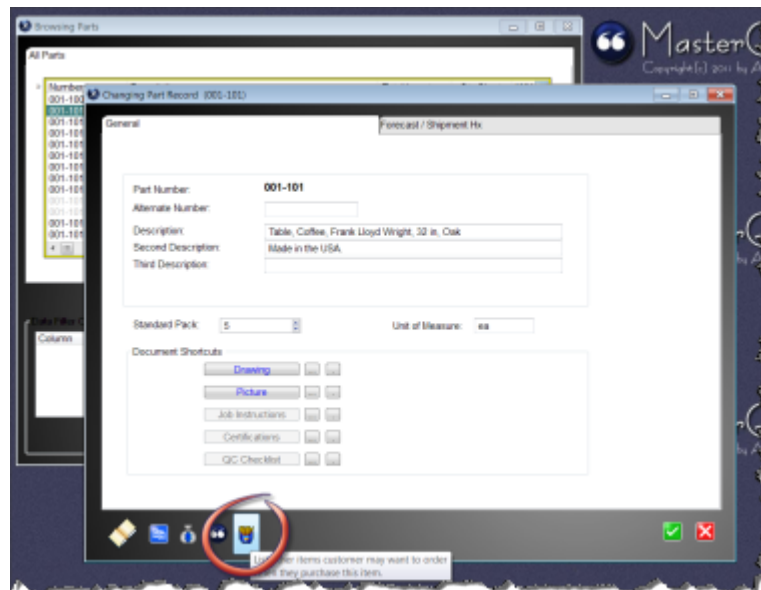
### Never Miss an Opportunity for Additional Sales

Fast food restaurants glibly ask "do you want to Super-Size that meal"? Without a doubt, it works or it wouldn't be so routine at every fast food drive through. Have you ever considered if you could implement a similar program with your products?

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

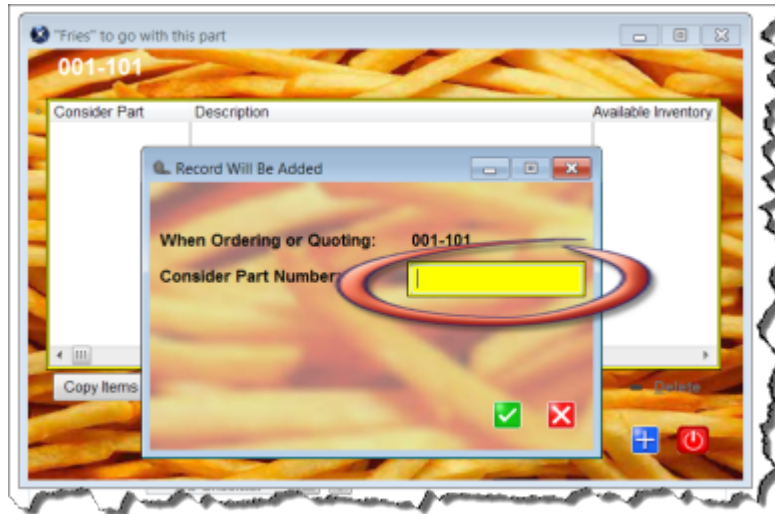
View the list of "fries" for a part by clicking the fries button at the bottom of the part record window.



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

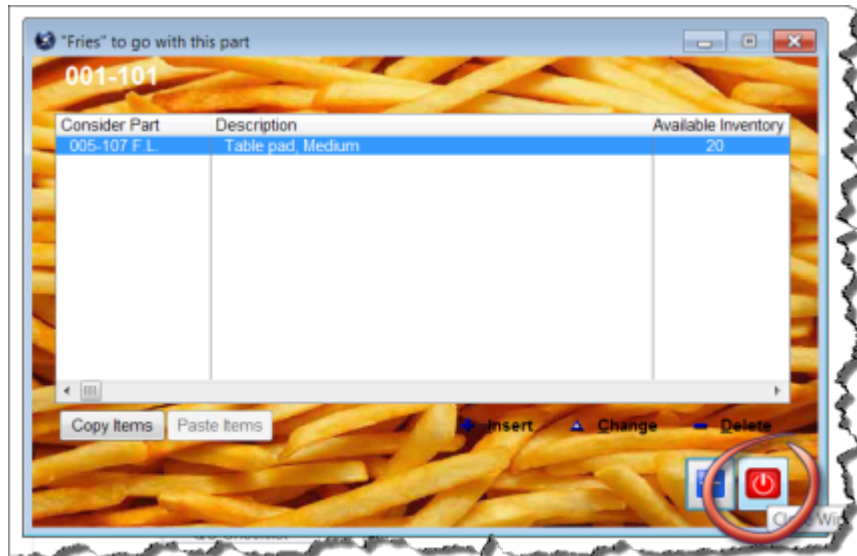
Press the insert button to add a new "fry".

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.

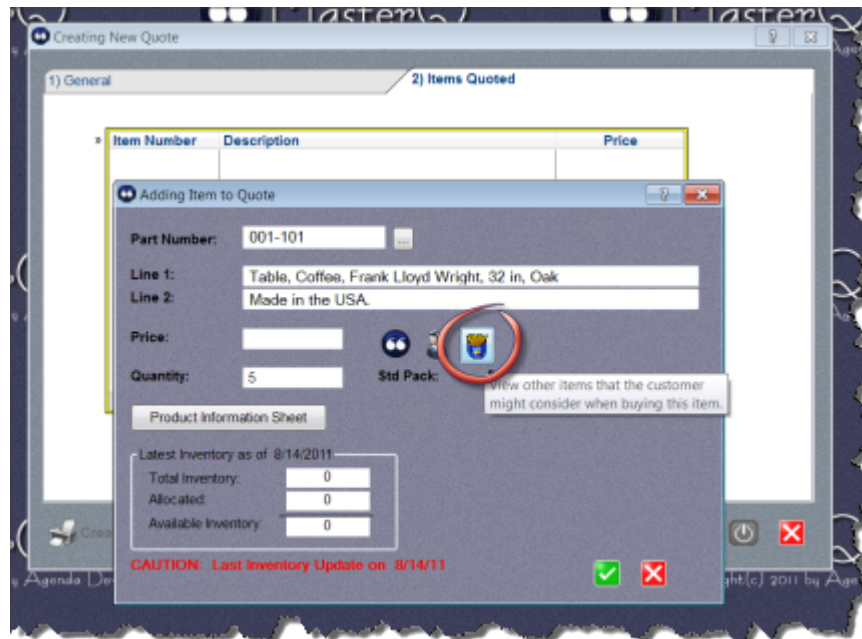


TIP: If you have multiple similar parts that will all use the same fries, create the list for the first part, then press the Copy Items button in the lower left corner. For other parts, simply repeat the fries list by pressing the Paste Items button.

## Review Related Items While Creating a Quote

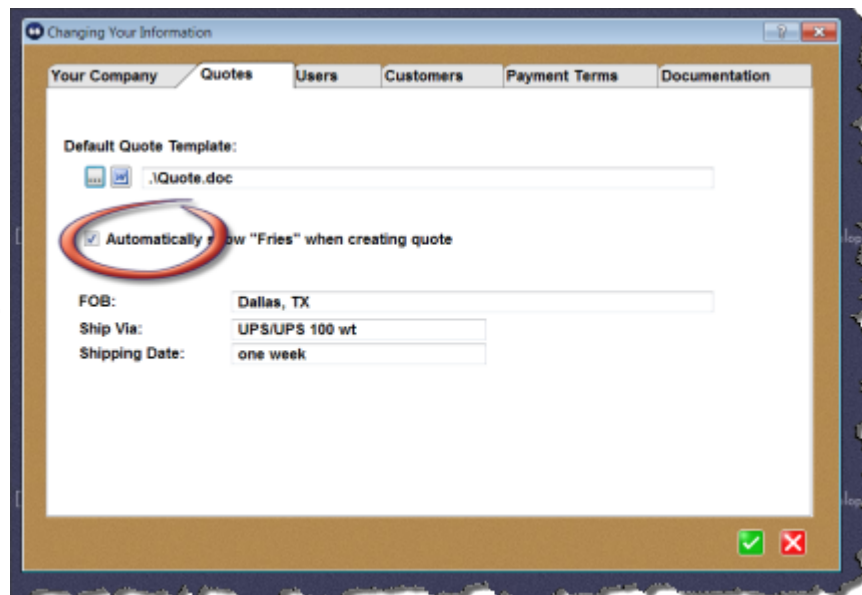
Once you have set up your "fries", there are two ways to be reminded to ask for the order.

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.



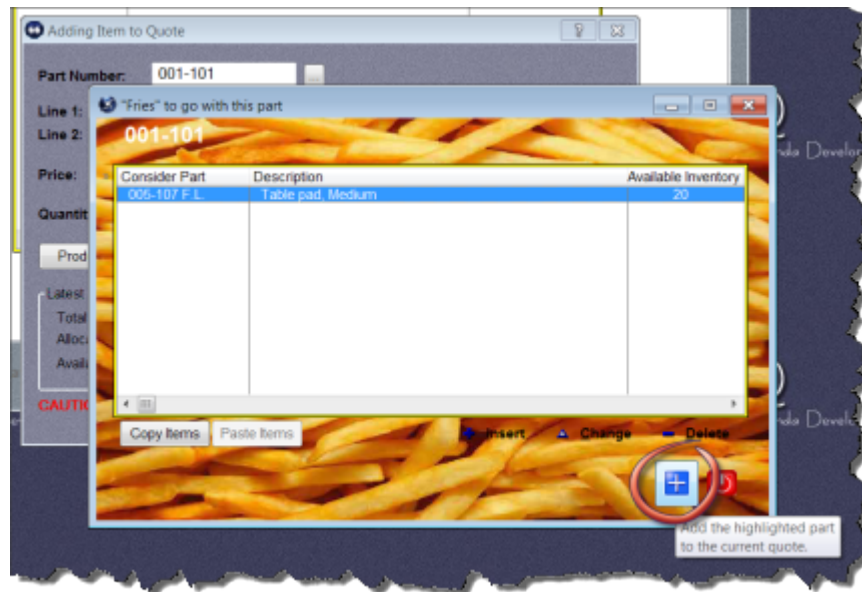


## Adding Related Items to a Quote

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.



## Custom Fonts

---

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.

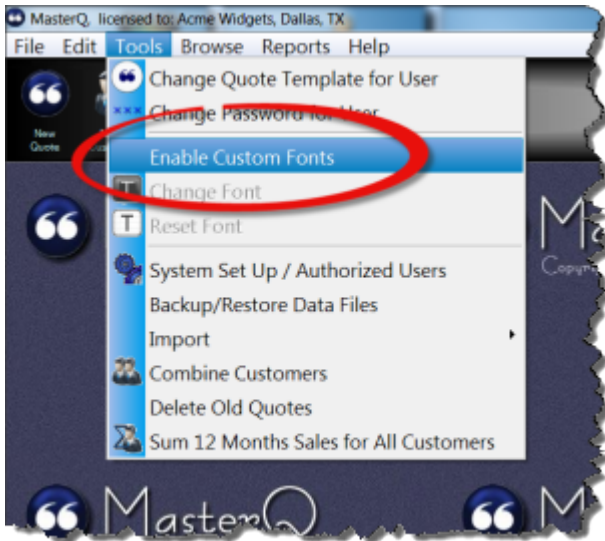


When you use Custom Fonts, each window is re-drawn using the fonts you have selected. This may result in a slight delay or screen flicker when opening windows. This will be more noticeable on slower computers. If this delay is a problem, simply disable custom fonts.

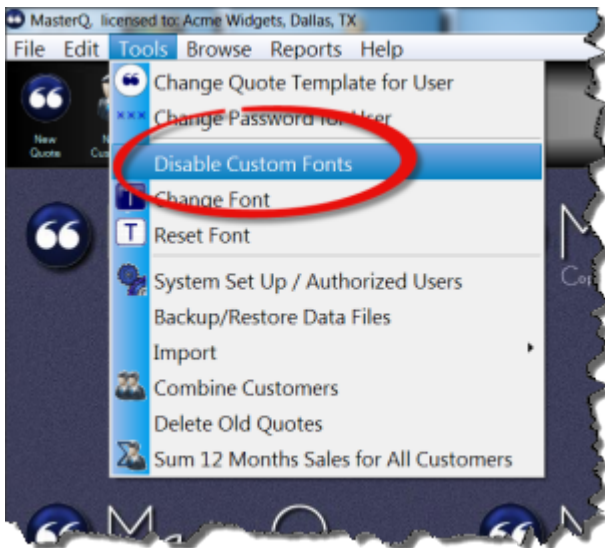
Next: [Enabling & Disabling Custom Fonts](#)

## 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.

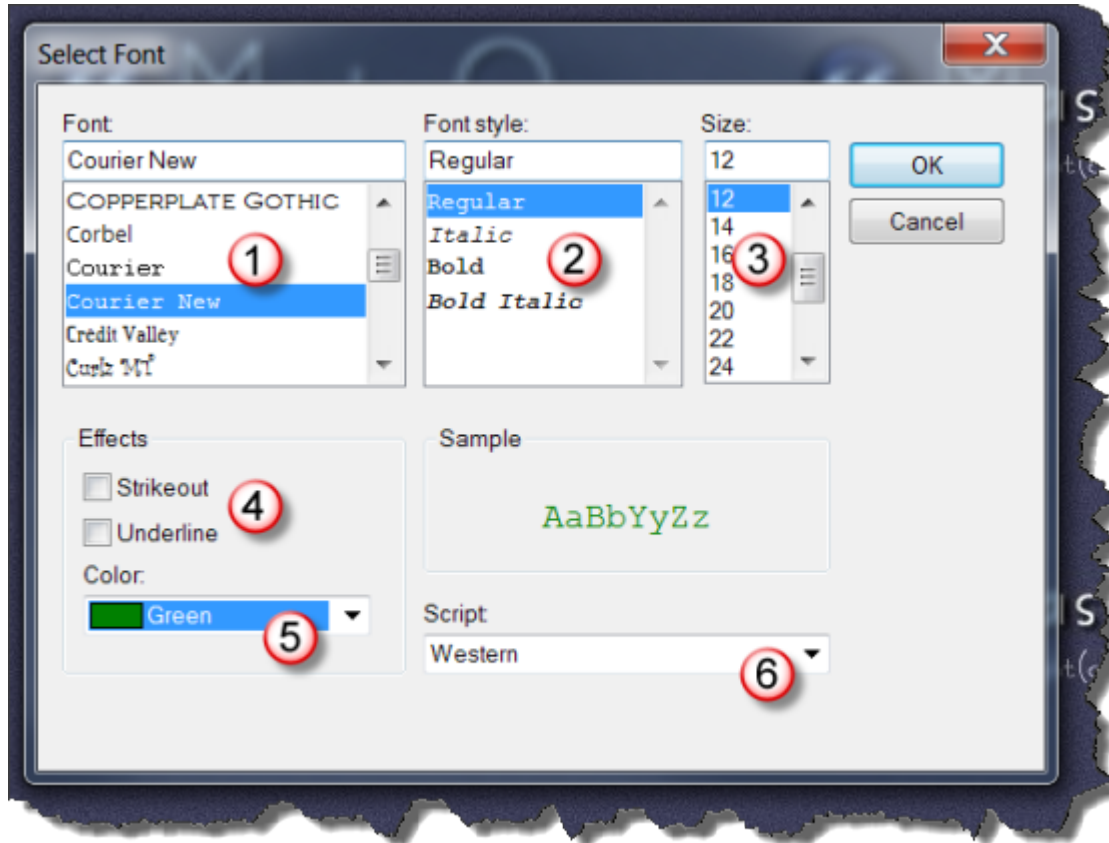


Next: [Changing Fonts](#)



## 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.

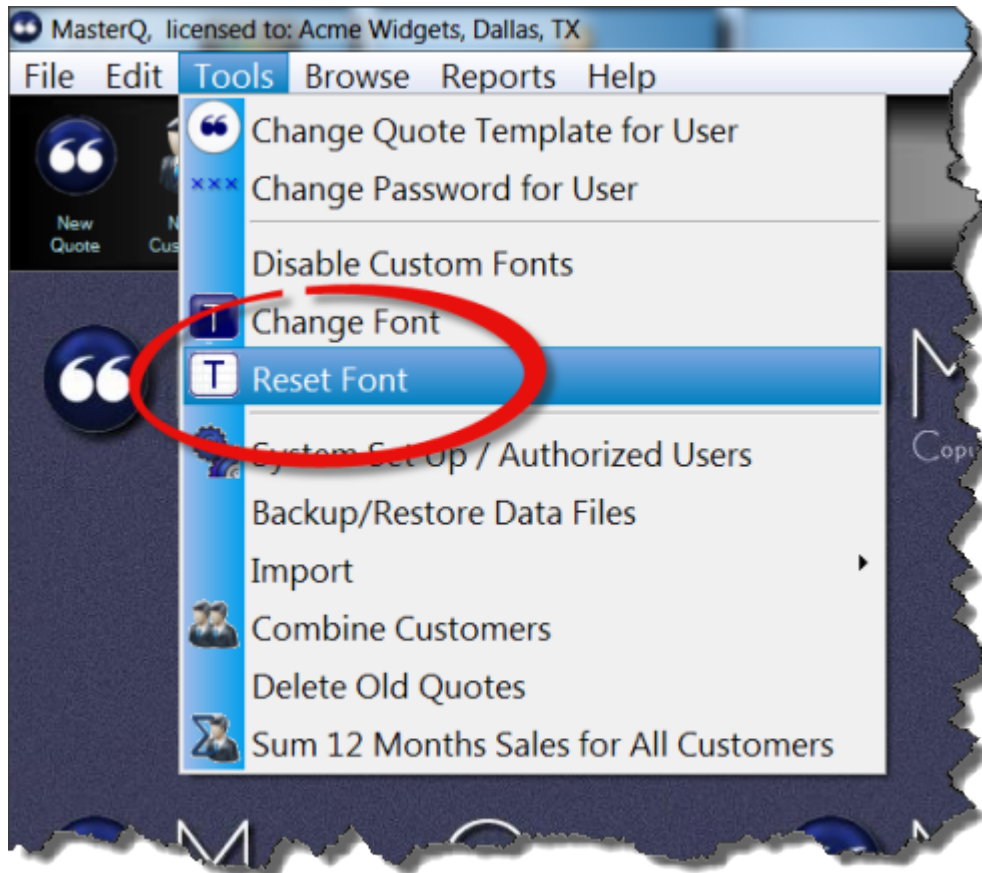
Note: Windows that are already open are unchanged.

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.

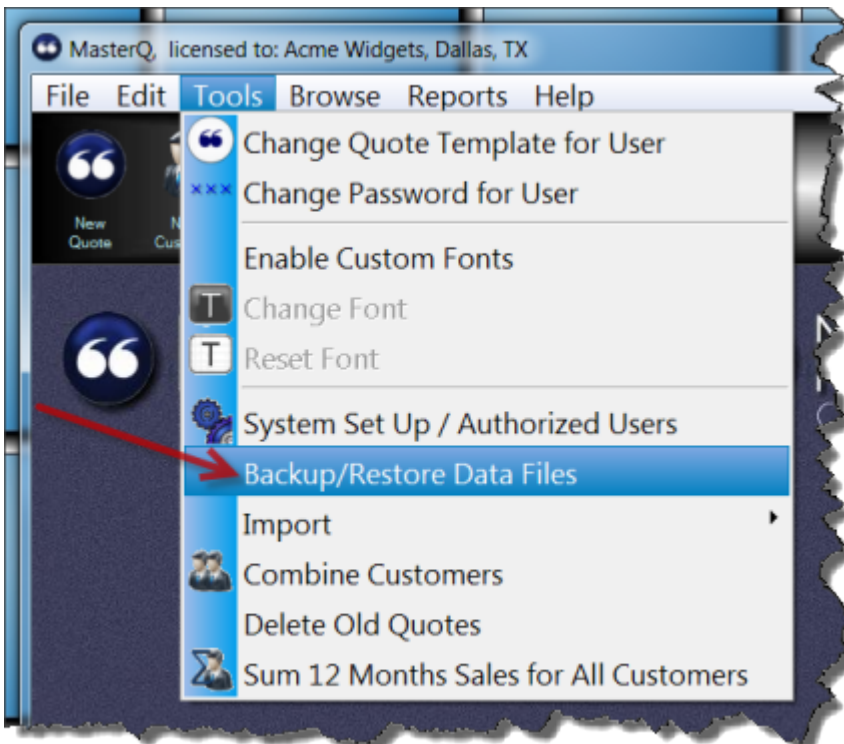


## BackUp and Restore Data Files

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.

To begin the BackUp and Restore procedure, select **Tools|Backup and Restore** from the main menu.

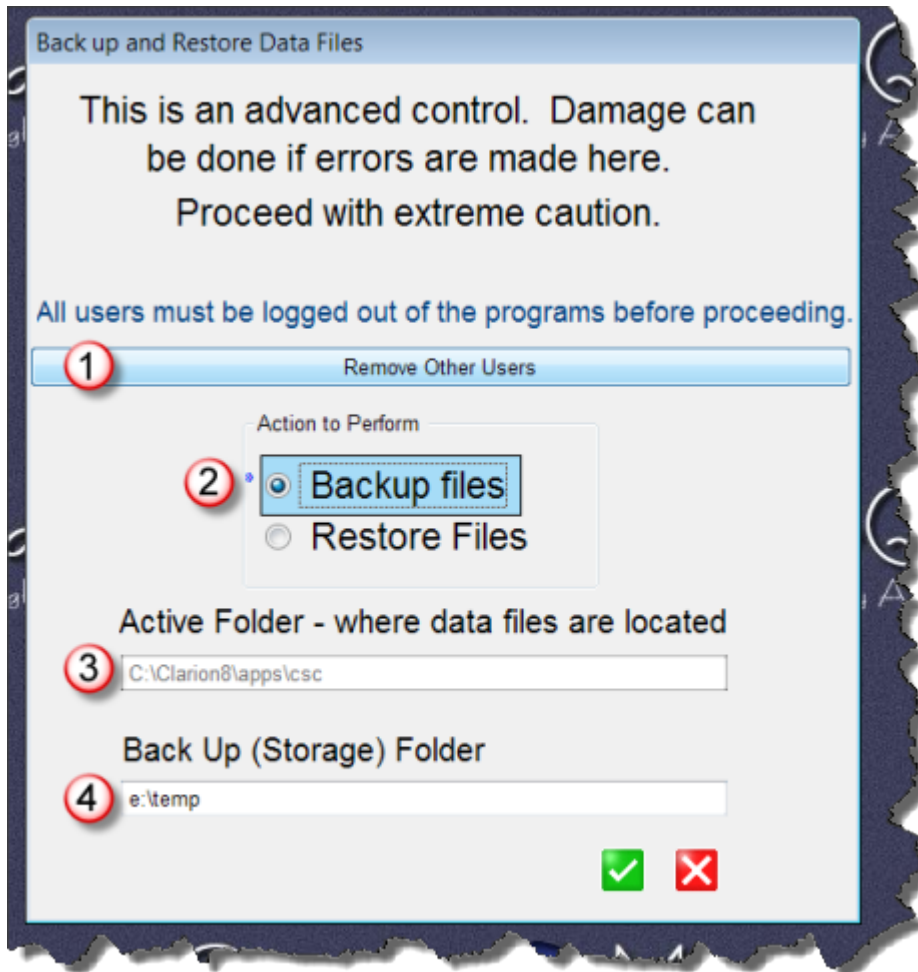


Next: [Backing up data files](#)



## 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.



1 Remove other users button. Notifies other users that they have 60 seconds to complete their tasks and exit the programs.

2 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.

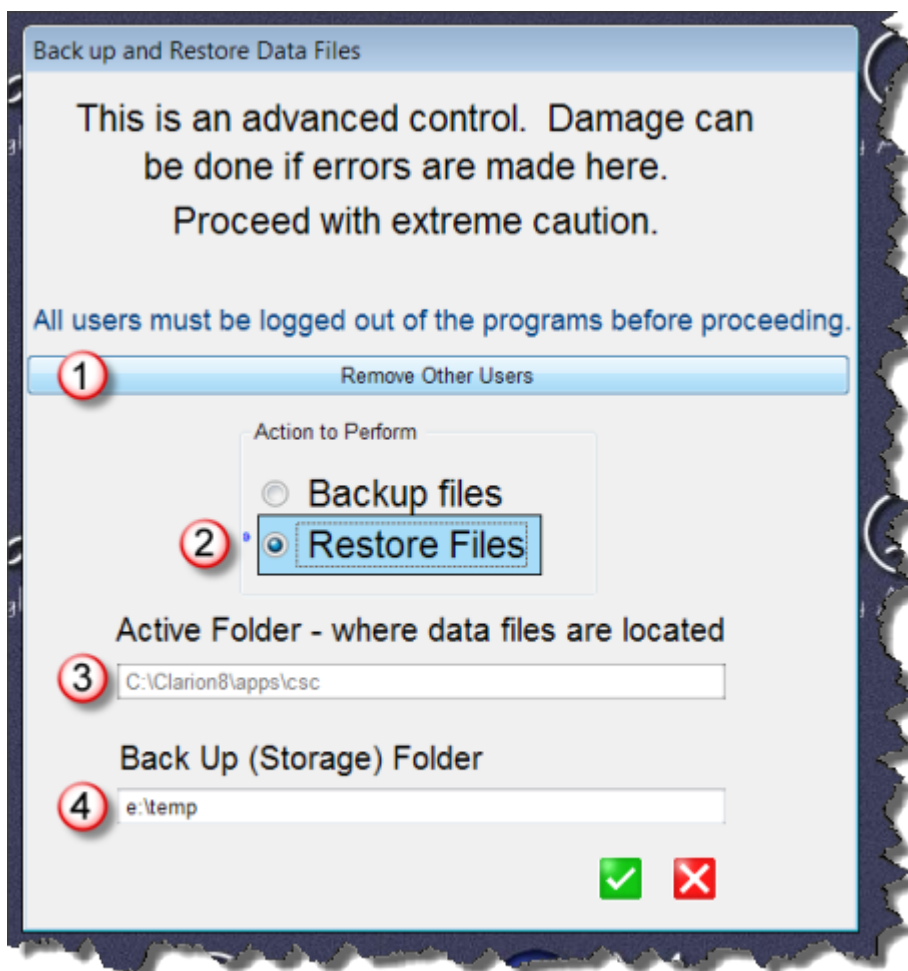
Next: [Restoring Data](#)

## Restoring Data Files

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?



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.





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.













## Importing Inventories

---

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, 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). 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 in numerical or alphabetical order.

NOTE: If you do not currently use another program for maintaining inventories contact Agenda Development for options.

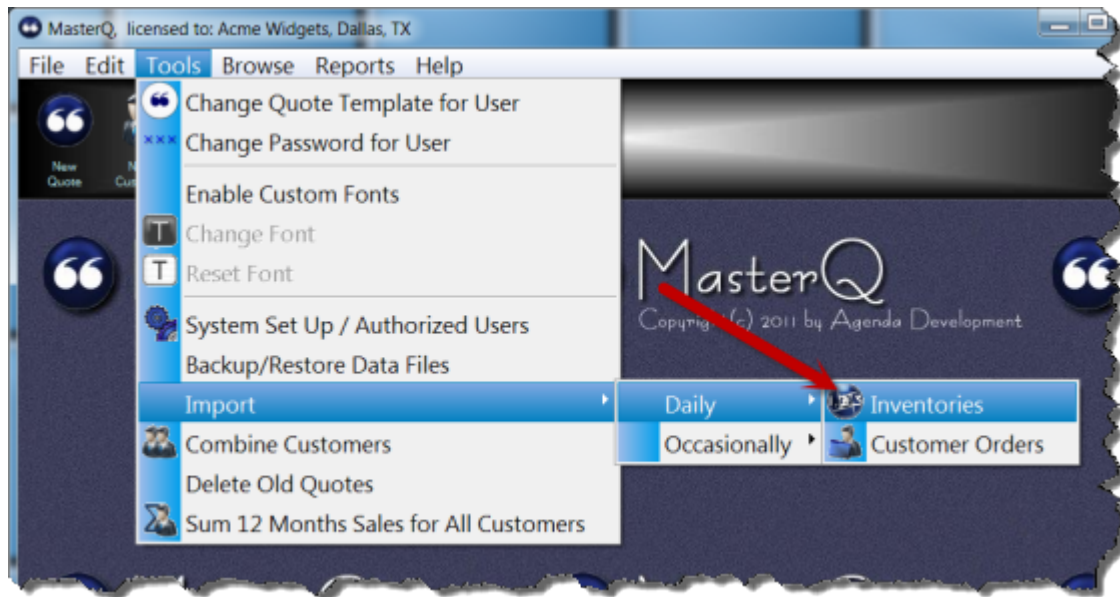
### Steps required:

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.



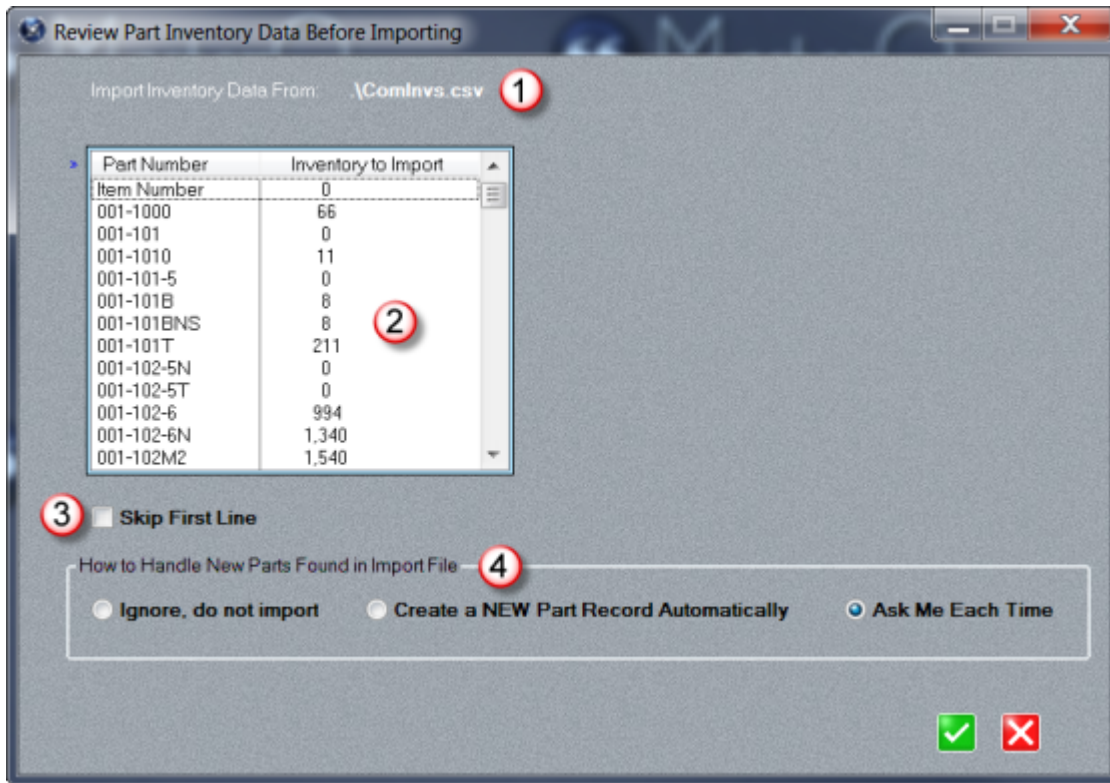
### Select the file containing the shipment history to import.

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

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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

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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 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](#).

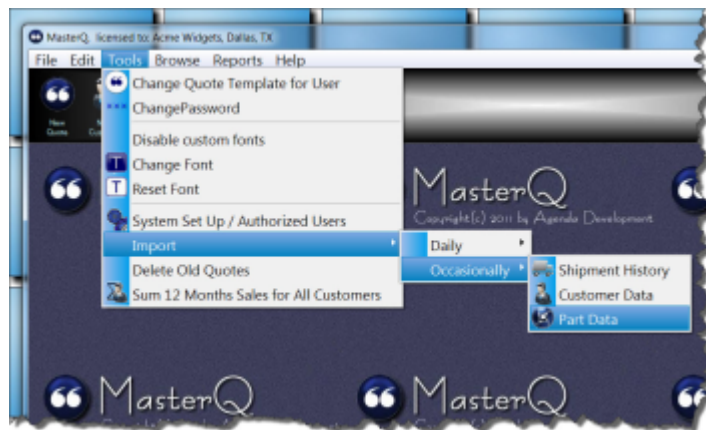
The file format required is called CSV which stands for comma separated values. Sometimes this format is also called ASCII. It is a very common format that many programs are able to handle. (Microsoft Excel is able to easily export information in this format also. If your current software can export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

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

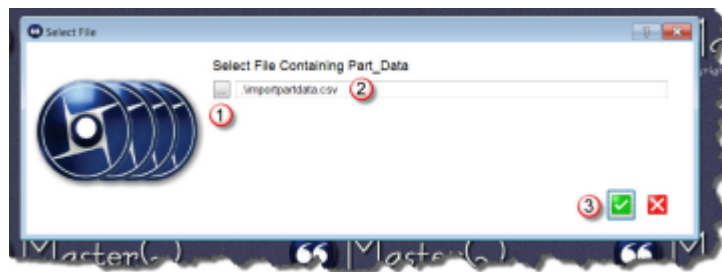






Next, you will need to tell MasterQ which file contains your data.







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.



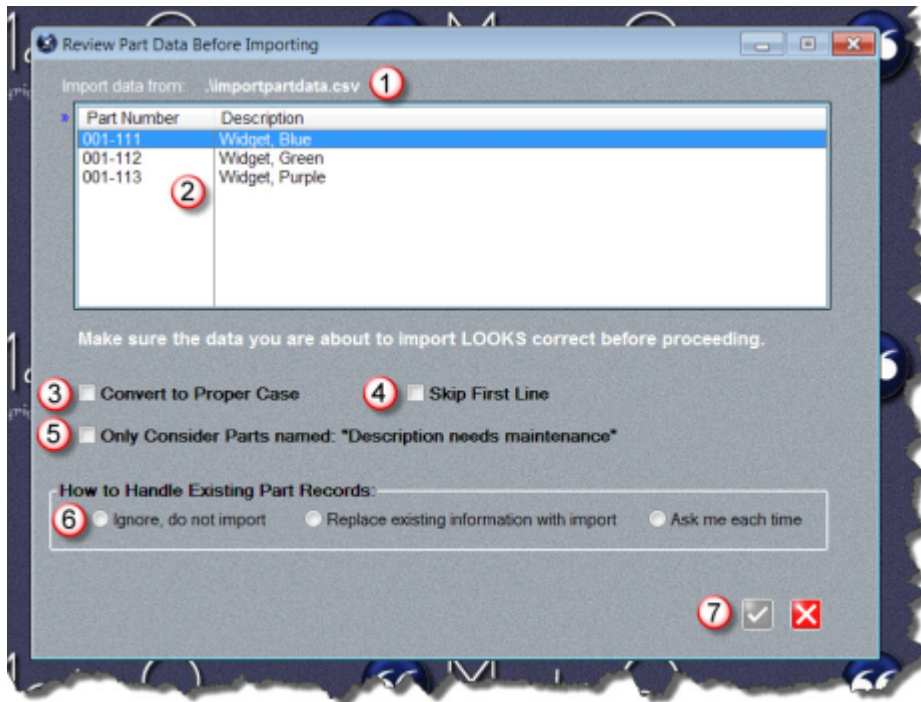


MasterQ will remember the file you choose. If you import this information again in the future, the file you used will be filled in automatically. If you want to use the same file, all you will need to do is press the OK button.



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





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.











## 12 Months Sales Dollars

---

This feature requires the optional Sales Manager Module. If this module is not installed, this command will not be available from the menu. To use this feature you must, of course, also [import your sales history](#) periodically.

MasterQ can show you each customer's total sales for the previous 12 months. You can sort your customer list in ascending or descending order or you can [filter](#) customers in the list. For example, you could filter for customers with sales of more than \$10,000 who have not ordered in the past 60 days.

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 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.

[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.

It may be handy to sort your customer list by twelve months total sales dollars. There are two ways to do this.

If you import sales history for your customers, 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.





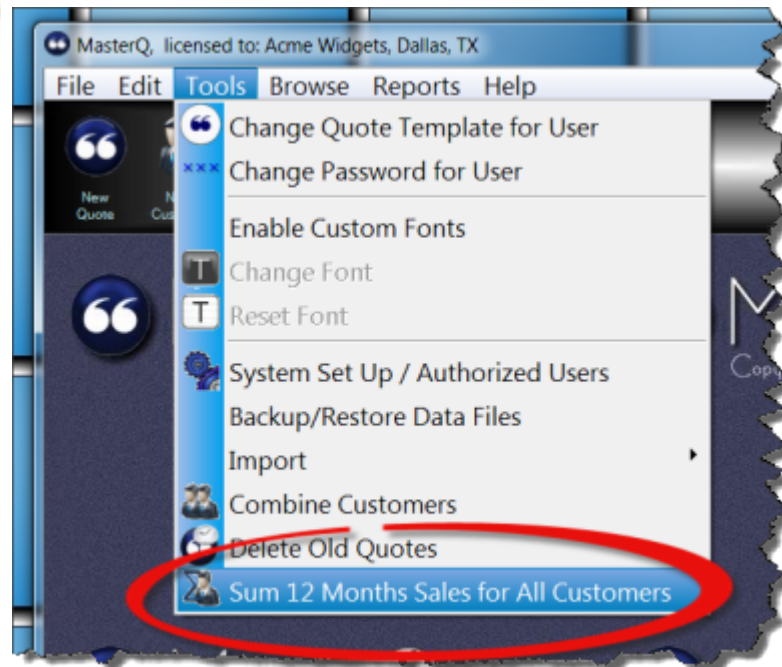


## Sum 12 Months Sales for All Customers



This feature requires the optional Sales Manager Module. If this module is not installed, this command will not be available from the menu.

**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.



