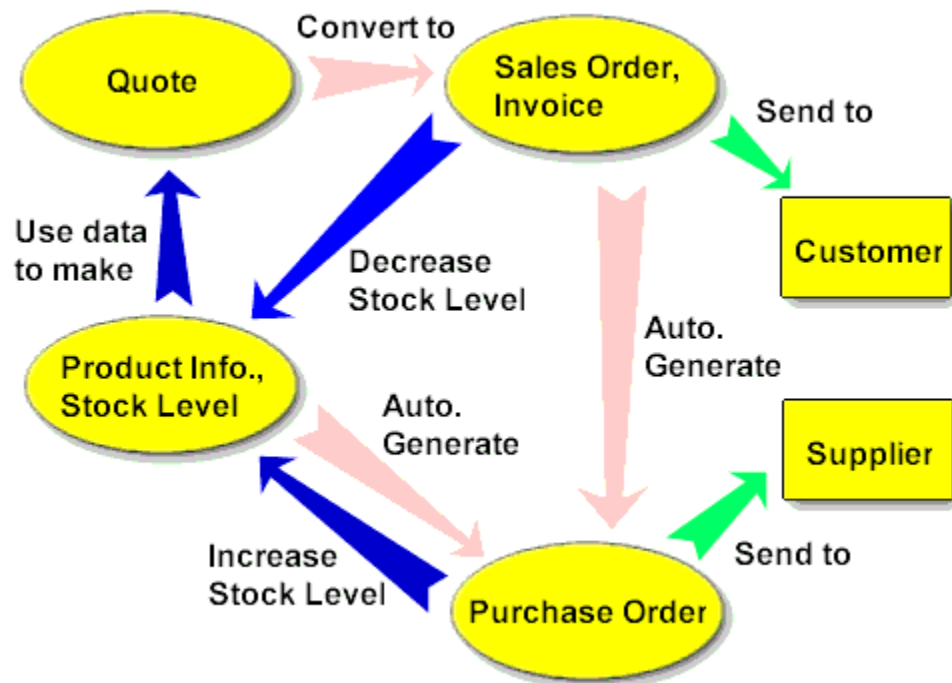


## What is Handy Quote

Handy Quote is a price / job quote software for wholesale, retail and any businesses. It makes quote creation an easy and enjoyable task.

Handy Quote is a fully integrated software package that provides a complete solution to your fast moving business requirements. The whole process begins with creating a new quote (see figure below). The created quote is then converted to a sales order and then an invoice. Purchase orders are then automatically generated either from sales orders, or from low Stock level, thus eliminating all unnecessary duplication work.



Picture of Business Process Cycle

A highlight of features:

- A flexible editing facility is provided for both hierarchical product categories and product items.
- There are two ways for user to quickly access to all product items in the database, either by manually browsing through the categories, or by using the powerful Find and Filter facilities.
- The pricing facility handles from simple to demanding pricing requirements. It supports multilevel pricing structures and provides multiple rounding options.
- A Template facility is provided for storing pre-made quotes which can be quickly recalled and modified to create a new quote.
- A powerful data exporting function is provided which allows user to export virtually any data in the database. For example, stock movement and sales orders data can be easily obtained for further analysis.
- A report editor is provided for user who wish to design their own professional-looking reports for quotes, sales orders, invoices, purchase orders, stock items, suppliers, customers, sales summaries, etc. There are twenty or more report layouts (9formats) available for user to use and customize.

- Handy Quote is network ready and supports multi-user access to the database.

To find out more about Handy Quote, you are most welcome to try this program now. An Animated Tutorial makes the learning process easy and enjoyable. The FREE evaluation period for Handy Quote is 30 days with a maximum number of quotes limited to 500.

## Main screen

The main screen provides four functions. It allows user to: 1) modify (create, edit, move) product categories; 2) modify product items (Parts) in each product category; 3) prepare a price quote; 4) access to all parts of the program.

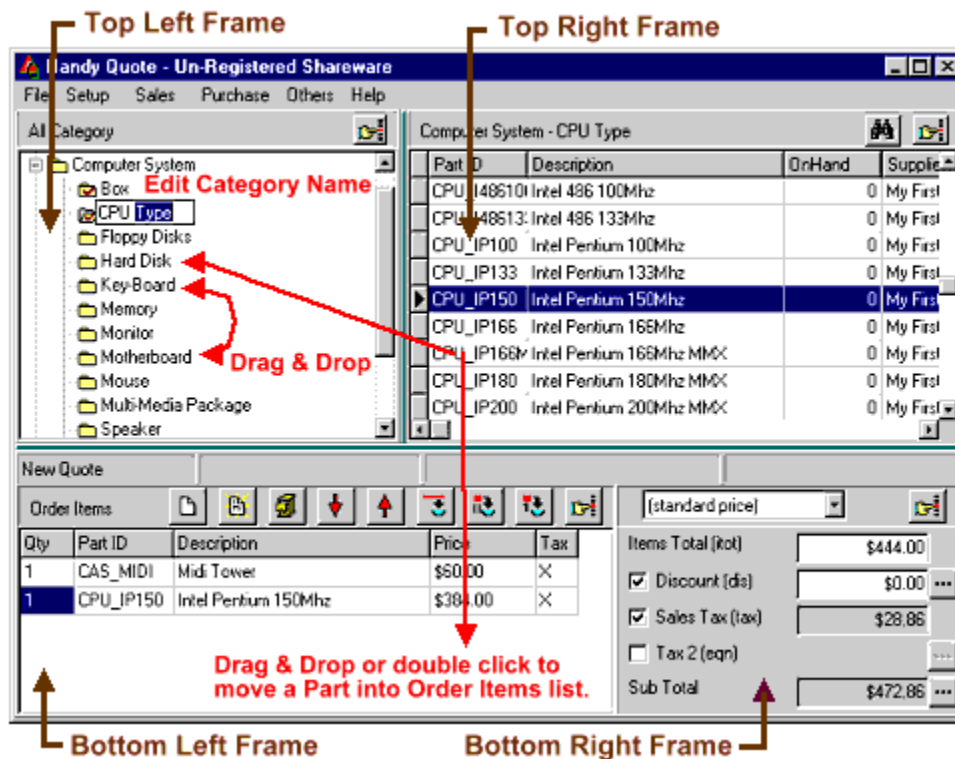
The following icons are used extensively in the program:



“Pop-up menu” button. Pop-up menu button in each frame has its own unique functions and commands. Please explore all of them.



“Find” allows you to search and filter records. This is a powerful tool and is used by the program in printing reports and exporting data.



Picture of the Main Screen

The menus: File, Setup, Sales, Purchase Orders and Help, are each explained in the [Main Screen Menus](#).

As shown in the picture above, the screen is divided into four frames: Top Left, Top Right, Bottom Left and Bottom Right. Each frame has its own "Pop-up menu". The pop-up menu can be accessed by either right mouse button, or the button

### Top Left Frame

The Top Left Frame allows user to create, rename, move, delete and duplicate Categories. Similar to Microsoft Windows 95 Explorer, user can organize the structure of the product category via drag and drop. The pop-up menus available in this frame are explained below:

- New Main Category - Create a new category at the most left position (without a parent category).
- New Sub Category - Create a new child category below the currently selected category.
- Move To - Move the selected category from one parent to the other. Use this pop-up menu when it is difficult or impossible to use the drag and drop to achieve it.
- Duplicate - To duplicate the selected category and its entire contents.
- Rename - To rename the selected category.
- Delete - To delete the selected category. This is the same as pressing the key <Delete> on the keyboard when the category is selected.
- Expand All - Expand the whole category tree structure.
- Collapse All - Collapse the whole category tree structure.
- Sort - To re-sort the directory tree structure in alphabetical order. This is useful after you have moved and renamed categories.
- Refresh Data - Refresh Data is useful in a network environment where one person is changing the data on-line, while another is serving and providing a quote / order for customer.


### **Top Right Frame**

The Top Right Frame allows user to create, edit, duplicate and delete Part records within a selected category. Double clicking a Part in this frame means to insert the Part into the Order Items list. If user clicks the column header, the whole list is sorted by that column. The pop-up menus available in this frame are explained below:

- Edit - Open up the [Part Editor](#) screen for the selected Part record. In this screen, user can edit existing Part records, create new ones, or delete Parts records.
- New - Open up the Part Editor screen with a new Part record.
- Duplicate - Duplicate the selected Part record and assign a different unique Part ID to the duplicated record.
- Delete - Delete the existing Part record. This is the same as pressing the key <Delete> on the keyboard when the category is selected. **Warning:** *Please make sure that you have actually clicked the Part record before pressing the Delete key because you can accidentally delete the whole category instead.*
- Show Cost - Show or Hide the cost column in the Parts list.
- Sort By Cost - Sort a Parts list by its cost price.
- Refresh Data - Refresh Data is useful in a network environment where one person is changing the data on-line, while another is serving and providing a quote/order for customer.

### **Bottom Left Frame**

The Bottom Left Frame is the Order Items list. This list contains items which are to be placed in a quote or order. If user double clicks a Part in the Top Right Frame, the selected Part becomes an Item in the

Order Items list. This is the same as clicking the button . The column "Price" in this frame is the price of one unit. It will not change when you change the quantity amount, but the field Items Total will be changed.

The buttons are explained below:



Empty / Clear the Order Items list, making it ready for a new quote.



Move an Item in the Order Items list down one record.



Move an Item in the Order Items list up one record.



Insert an Items Group Boundary. Items Group Boundary summarizes all items that are above it and below any Items Group Boundary higher in the list. As shown in picture below, the last Items Group summarizes three Items above it.

Qty	Part ID	Description	Price	Tax
1	BCK_ZIPINT	ZIP Drives 100Mb Internal	\$300.00	X
1	MOD_V34IN	V34 33.3K Internal	\$156.00	X
1	----	Items Group Boundary 1	\$456.00	X
1	SFT_CORD6	Corel Draw V6	\$540.00	X
1	SFT_MS095	Microsoft Office 95 Professional	\$600.00	X
1	OS_WIN95	MS Windows 95	\$120.00	X
1	----	Items Group Boundary 2	\$1,260.00	X

Picture of Items Group Boundary



Insert a Part (selected in Top Left Frame) into the Order Items list using Markup 2.


The pop-up menus available in this frame are explained below:

- Delete - Delete the selected Item from the Order Items list. This is the same as pressing the key <Delete> on user's keyboard.
- Edit - Open up the Item Editor screen for the selected Item record. In this screen, user can change the field Description, Quantity, Cost, Markup, etc.
- Make a New Quote - Create a new permanent quote/order record in the database filled with items in the Order Items list.
- Update Current Quote - A quote / order record in database can be recalled back into the main screen. User can then modify its items, then update all the changes back into the existing record in the database.
- Recall Quote... - To recall a quote/order record from the database for updating or use as a template. Existing data in the Order Items list will be cleared before loading the recalled quote/order. This is useful for loading a pre-made quote/ template. When recalling, the pricing information for all Item records are updated with the latest pricing. Use the Sales Order Editor screen instead if user does not want any price update.
- Recall Quote...(Append) - To recall a quote/order record from the database for its Items list only. Existing data in the Order Items list will be left unchanged. Items from the recalled quote/order record will be appended. This is useful for loading pre-made templates for making a quote quickly. When recalling, the pricing information for all Item records

are updated with the latest pricing.

- Auto Create Purchase Orders - This is a facility to create a purchase order from the items in the Order Items list. However this facility is superseded by the pop-up menu "Auto Create from Sales Orders" in the screen Purchase Order Editor.

### **Bottom Right Frame**

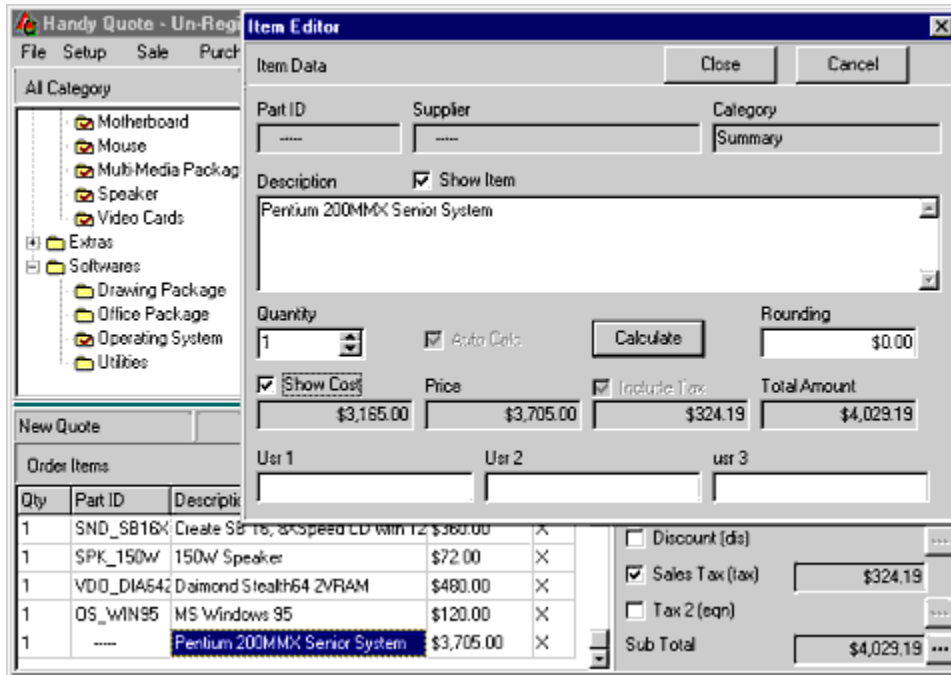
This frame is mainly for display purposes only. It also provides the facility to change the pricing level, discount, tax, and tax 2 options. The buttons  on the right hand side of the fields provide different facilities. The button beside the discount field allows user to enter a discount in percentage of the Items Total amount. The buttons beside the field Discount, Tax 2 and Sub Total open up an equation editor.

The pop-up menus available in this frame are explained below:

- Re-Calc - Re-calculate all the amounts in this frame.
- Show Markup - When this pop-up menu is checked, a total markup field is displayed just above this frame. The same operation can be achieved by clicking the panel where "Markup" is shown.
- Make a New Quote - Create a new permanent quote/order record in the database filled with items in the Order Items list.
- Update Current Quote - A quote/order record in database can be recalled back into the main screen. The user can then modify its items, then update all the changes back into the existing record in the database.
- Auto Create Purchase Orders - This is a facility to create a purchase order from the items in the Order Items list. However this facility is superseded by the pop-up menu "Auto Create from Sales Orders" in the screen Purchase Order Editor.

## Items Group Boundary

Items Group is for grouping one set of Items into a single entity. For example, a computer system consists of many different parts group together into a single unit. Items Group itself is an Item, therefore possesses some of the properties of an Item. User can specify a quantity of the whole group, a Rounding value, etc.



Picture of the Items Group in the Item Editor screen

Items Group Boundary summarizes all items that are above it and below any Items Group Boundary higher in the list. As shown in picture below, the last Items Group summarizes three Items above it.

The screenshot shows the 'Order Items' table with the following data:

Qty	Part ID	Description	Price	Tax
1	BCK_ZIPINT	ZIP Drives 100Mb Internal	\$300.00	X
1	MOD_V34IN	V34 33.3K Internal	\$156.00	X
1	----	Items Group Boundary 1	\$456.00	X
1	SFT_CORD6	Corel Draw V6	\$540.00	X
1	SFT_MS095	Microsoft Office 95 Professional	\$600.00	X
1	OS_WIN95	MS Windows 95	\$120.00	X
1	-----	Items Group Boundary 2	\$1,260.00	X

Red arrows indicate that the 'Items Group Boundary 2' row summarizes the three items above it (SFT\_CORD6, SFT\_MS095, and OS\_WIN95).

Picture of Items Group Boundary

Another feature of Items Group is this: when printing using Report Layout "Sales Report 1", "Sales Report 2" and "Sales Report 3", only one price is given for the whole group. The prices for all the items in a group are not printed. This has the advantage of being able to include hidden items such as labor cost in the group without causing mismatching of totals.

The word "Summary" as the Category name for Items Group can be changed. The place to change the word is in the Labels Administration screen, under Category "Systems", and near the end of the list called "Label for summary". User can change both the Label and Column Label to different words.



## Markup Value (Profit Margin) & Equation

There system supports two markup equations and values: Markup 1 and Markup 2. Markup 1 is the default markup for an item. On the Main screen, if user double clicks a Part record (or drag and drop), then Markup1 is used for the selected Part when it is inserted into the Order Items list.

To use Markup 2, user must use the button . Markup 2 is provided as a second alternative markup.

A list of variables which can be used in the equation are:

- cost - cost variable
- taxr - tax rate
- a - markup parameter A
- b - markup parameter B
- c - markup parameter C
- d - markup parameter D
- e - markup parameter E

The best way to understand the two markups is from the Part Editor screen. In the Part Editor screen, the two markups are calculated from two equations specified in the fields “Markup Equation 1” and “Markup Equation 2”. There are five Markup Parameters A, B, C, D and E, whose values depend on the Price Level selected. The Price Level table is located at the bottom right corner of the Part Editor screen.

A list of commonly used markup equations are:

- cost \* Markup\_Parameter (Where Markup\_Parameter can be A, B, C, D and E. In this case, the value of the Markup\_Parameter depends on the Price Level. The markup value is therefore dependent on the Price Level.)
- cost \* A\_Number (Where A\_Number can be 0.3 for 30% markup, 0.5 for 50% markup etc. In this case, the markup value does not depend on Price Level, but it is still dependent on the Cost.)
- A\_Markup\_Number (Where A\_Markup\_Number can be any number. In this case, the markup value is a constant and does not depend on any other value).

The above list is just some simple examples. However, user can assign more complex markup equations.

For a more detailed description, please see the Part Editor screen.

## Main Screen Menu

All the main menu (excluding pop-up menus) in the Main Screen are explained in this section.

### **File - Import Parts Data**

Open up the screen "Import Parts CSV file" for importing Parts data. There are a number of import file formats. One of them is designed to be very simple to use. If your supplier provides parts pricing in electronic form, you can easily convert it to this format using your own spreadsheet and directly update your parts pricing automatically. For a more detailed description on each import format, please see Parts Import Format.

### **File - Export Parts Data**

Open up the screen "Export Table Parts" for exporting Parts data into CSV format. The exported file can be used for import using the menu "File - Import Parts Data". The format used in this export is Format 1. The exported data can be easily modified to Format 2 using a MS Excel spreadsheet. For a more detailed description on each import format, please see Parts Import Format.

### **File - Print Parts Data**

Use this menu to print a Parts data report. User can print either with or without markup values and price (=cost + markup) values. To print with markup and price values, user is required to specify a Price Level.

### **File - Exit**

Quit this program.

### **Setup - Secure Data**

This is a toggle (on/off) menu. If it is checked, the software is in Secure Mode. In Secure Mode, user has limited access to the database. Please try it to see what is available, what is not. This securing feature should be combined with password protection (see Setup - Password below). When this menu is not checked, the software is not in secure mode. In this mode, user can access all areas of the database.

Two extra options are available in the screen "Set New Password" to give user more controls when in the secure mode.

### **Setup - Fields, Labels, Buttons**

Open up the screen Labels Administration for modifying labels, buttons and messages used by the system. The "messages" feature is not yet implemented in this release. In this screen, user can change the company address, screen fonts, etc. It will be implemented in the coming release.

### **Setup - Tax & Rounding**

Open up the screen Tax/ Rounding Setup for setting up tax calculation method, rounding values and options.

### **Setup - Password**

Open up the screen "Set New Password" for setting a new password or to delete an existing password (no password). Two extra options are available in this screen to give user more controls in the secure mode. For more details, please see Password.

### **Setup - Save Desk Top Setting**

Save the current Desk Top setting into the software's .INI file. When user starts the program, the saved settings will be loaded. The settings are saved on each individual machine.

### **Setup - Reset Desk Top Setting**

Delete or clear the saved Desk Top setting.

### **Setup - Registration Code**

Open up the screen "Enter Registration Code" for entering a new registration code, or to increase the number of users in a license. To increase the number of users, existing user needs to fill in the registration form, and specify the number of user to increase, and write a note in the field "Comments".

### **Sales - Quote/ Order**

Open up the screen [Sales Order Editor](#) to print, modify, export and delete sales order records.

### **Sales - Customer**

Open up the screen Customer Editor to print, create, modify, export and delete customer records.

### **Sales - Order Types**

Open up the screen Order Type Editor to print, create, modify, export and delete Order Type records. The system comes with four Order Types: Quote, Order, Invoice and Template. User can add or remove any Order Type record as long as there is at least one Order Type in the table.

### **Sales - Order Terms**

Open up the screen Order Term Editor to print, create, modify, export and delete Order Term records. The system comes with some examples. User can add or remove any Order Term record as long as there is at least one record remaining.

### **Sales - Sales Type**

Open up the screen Sales Type Editor to print, create, modify, export and delete Sales Type records. The system comes with some examples. User can add or remove any Sales Type record as long as there is at least one record remaining.

### **Purchase - Purchase Order**

Open up the screen [Purchase Order Editor](#) to print, create, modify, export and delete Purchase Order records.

### **Purchase - Supplier**

Open up the screen [Supplier Editor](#) to print, create, modify, export and delete Supplier records.

### **Others - Employee**

Open up the screen Employee Editor to print, create, modify, export and delete Employee records. The system comes with some examples. User can add or remove any Employee record as long as there is at least one record remaining.

### **Others - Price Level**

Open up the screen [Price Level](#) Editor to print, create, modify, export and delete Price Level records. The system comes with some examples. User can add or remove any Price Level record as long as there is at least one record remaining.

### **Others - Delivery Options**

Open up the screen Delivery Option Editor to print, create, modify, export and delete Delivery Option records. The system comes with some examples. User can add or remove any Delivery Option record as long as there is at least one record remaining.

### **Others - Parts Type**

Open up the screen Part Type Editor to print, create, modify, export and Part Type records. The system comes with some examples. User can add or remove any Part Type record as long as there is at least one record remaining.

***Others - Payment Methods***

Open up the screen Payment Editor to print, create, modify, export and Payment records. The system comes with some examples. User can add or remove any Payment record as long as there is at least one record remaining.

***Help - Contents***

Open up the help file content.

***Help - Purchase Handy Quote***

Open up the Handy Quote Registration Form which allows user to register or add more users in a license.

***Help - About ...***

Open up the screen About. The screen About displays the total number of users in the license and able to access the screen Acknowledgment.

***Help - Acknowledgment***

Open up screen Acknowledgment to show a list of users who have contributed to the development of this software.

## Parts Import Format

There are altogether three Parts Import Formats available in this version. Each format is designed for a specific purpose. There are all in Comma Separated Variable (CSV) format, which most spreadsheet programs can handle. The CSV format used has been tested to be 100% compatible with Microsoft Excel and Microsoft Access.

The import facility has been made to be as flexible as possible. However, the following rules should be observed:

1. The first line (header line) will always be ignored / skipped.
2. Please note on the format for markup field: Depending on the Parts Import Format used, it can either be a percentage of the cost, or a currency value. Markup field for Format 3 (generated from Electronic Shop Assistance V1.2) is in percentage. However, all others are in currency value.
3. Initially try to import a small set of data for a trial run. When successful, user can then import all of the data set.

The three formats supported are:

### Format 1:

This is the format used by Handy Quote when user select menu "File - Export Parts Data". It is the most comprehensive format. However, if you like to import all of your data the first time, use Format 2 instead. To see an example, run the program and select menu "File - Export Parts Data". The structure of the format is:

Part ID	- Part ID.
Supplier	- Supplier Name.
Description	- Part Description.
On Hand	- Quantity on hand.
Cost	- Cost of Part.
Markup Equation 1	- Equation for calculating Markup 1.
Markup Equation 2	- Equation for calculating Markup 2.
Tax Rate	- Tax rate for Part, e.g. 0.07 (for 7% sales tax).
Part type	- Part type, e.g. labor, part, warranty.
<u>Rounding</u>	- Rounding value.
Show	- A True or False logical value.
Usr 1	- A 32 byte long field for storing other information.
Usr 2	- A 32 byte long field for storing other information.
Usr 3	- A 32 byte long field for storing other information.
Categories	- A list of categories.

### Format 2:

This is the most simple format. It was designed for the purpose of importing the on-going price data updates. It is also suitable for importing data for the first time.

In this format, there are two types of line format: The first line format (Type 1) has only one field in the whole line:

Category - the category where the parts after this line will be stored.

The second line format (Type 2) can have a minimum of three fields: Part ID, Part Description and Part Cost. However, it can handle up to seven fields as well. The structure of the format is:

Part ID - Part ID (mandatory)  
Description - Part description (mandatory)  
Cost - Part cost (mandatory)  
Tax - Tax Rate for Part, e.g. 0.07 (for 7% sales tax).  
markup1 - Equation for calculating Markup 1  
markup2 - Equation for calculating Markup 2  
supplier - Supplier Name

The Type 1 line format is optional. When it is not provided in a file, all records will be dumped into Category "Imported". However, for each record imported, if there is a record in the database which matches the imported record's Part ID, then, the record in the database is updated, but its original Category structure stays the same. This is useful for updating periodical changes where the import data file only contains Type 2 line format.

Note that if you want to specify the supplier name and not specifying tax, markup1, markup2, then your line should be "PART001, Part Description, 30, , , , My Best Supplier". The four commas between the cost and the supplier name must be included.

An example for format 2 is as follow:

```
Motherboard & CPU
MB-P2/233, Pentium 2 motherboard with Intel Pentium II-233MHz CPU, 800
MB-P2/266, Pentium 2 motherboard with Intel Pentium II-266MHz CPU, 900
Harddisk
HDSM-1.2,Samsung IDE 1.2 Gig IDE 12Ms, 135
HDSM-1.6,Samsung IDE 1.6 Gig IDE 11Ms, 135
HDSM-2.0,Samsung IDE 2.1 Gig IDE 11Ms, 135
. . .
```

### Format 3:

This is the export format used by Electronic Shop Assistance V1.2. This format allows user to import data from V1.2 to handy Quote V3. The structure of the format is:

Category 1 - Main category  
Category 2 - Sub Category  
Description - Part Description  
Cost - Part Cost  
Markup1% - Markup 1 in percentage (e.g. 0.3 for 30%).  
Markup2% - Markup 1 in percentage (e.g. 0.3 for 30%).  
Tax Rate - Tax Rate for Part, e.g. 0.07 (for 7% sales tax).  
Part ID - Part ID  
Usr 2 - User defined code 2.

An example for format 3 is as follow:

```
Computer System, CPU Type, Intel 486 100Mhz,80,.2,.5,.085,,
Computer System, CPU Type, Intel 486 133Mhz,130,.2,.5,.085,,
Computer System, Box, Mini Tower,40,.2,.7,.085,,
Computer System, Box, Desk Top,40,.2,.7,.085,,
```



## Part Editor screen

The Part Editor provides editing of Part record in the database. A "Part" is defined as a record of stock or costing item like labor, warranty, etc. It contains pricing information, but do not have a sales price. When a Part becomes an Item in an Order Items list, a sales price is then calculated based on selected Price Level, Markup Parameters (A, B, C, D and E), Markup Equation (there are two of them) and Rounding coefficient.



This screen can be accessed from two places: the Top Right Frame of the Main screen using pop-up menu "Edit", or the Supplier Editor screen.

Markup and Price changes when this is changed.

Markup parameters (a), (b), (c), (d) and (e)

Price Level	V.High	High	Medium	Low	V.Low
(standard price)	0.7	0.4	0.2	0.15	0.1
Price Level 1	0.5	0.35	0.15	0.13	0.09
Price Level 2	0.4	0.3	0.12	0.11	0.07
Price Level 3	0.3	0.25	0.1	0.08	0.05

Picture of Part Editor

A Part must have a unique Part ID, must have a Supplier and must have a Category. When user creates a new Part using the button , please make sure these three fields must be filled before saving it with button .

As shown in the picture above, the value for Markup 1 is calculated using equation "cost \* d". And Markup 2 is calculated from equation "cost \* d \* 1.1". The Price Level selected is "Price Level 1", therefore markup parameter "d" is equal to 0.13. Let us tabulate the calculation process:

For Markup 1, the calculation is as follow:

Cost:	\$500
Price Level:	Price Level 1
Parameter "d":	0.13



Markup Eqn. 1:  $\text{cost} * d \implies \$500 * 0.13 \implies \$65$   
 Price 1:  $\text{cost} + \text{Markup} \implies \$500 + \$65 \implies \$565$


For Markup 2, the calculation is as follow:

Cost: \$500  
 Price Level: Price Level 1  
 Parameter "d": 0.13  
 Markup Eqn. 2:  $\text{cost} * d * 1.1 \implies \$500 * 0.13 * 1.1 \implies \$71.50$   
 Price 2:  $\text{cost} + \text{Markup} \implies \$500 + \$71.50 \implies \$571.50$

The purpose of having two markup equations (1 and 2) are to provide more flexibility. How to use them is up to the user. A suggestion would be to set Markup 2 to be 10% higher than Markup 1 (as shown in the example above of multiplying with 1.1 (1 + 10%)).

A Part does not physically have a price yet. It has markup equations, cost and tax rate. The field Price, Markup, Tax and Total shown in the Part Editor screen are instantly calculated fields. The values for these fields depend on the fields: Price Level, Rounding, and the markup parameters A, B, C, D and E.

All the fields in the a Part are explained below:

- Part ID                    A unique identity for a Part. A suggestion would be to make it the same as the Part ID used by user's supplier. This way, user can electronically update the cost price of a Part using the menu "File - Import Parts Data". This field must be filled.
- Supplier                 This is the supplier name. User cannot create a new supplier from this screen. To create a new Supplier record , use the menu "Purchase - Supplier". This field must be filled.
- Category                This is the category name where the Part belong to. If user access this screen from the Main screen, then this field is not changeable. If user access this screen from the Supplier Editor screen, then this field is changeable. Beware of setting up the value of this field because user does not see the hierarchical structure of categories. This field must be filled.
- Part Type                This is an optional field. The list of Part Type cannot be changed here. It can be change from the menu "Others - Part Types" in the Main screen.
- Description             Multiple lines description of a Part. To place a text string on a new line, press the <Enter> key on your keyboard.
- Show                     A check box to show or hide this Part when printing. This is useful for those Parts which user does not want them to be printed. When an item is not printed in a report, its price is still being added to the field "Items Total" or the price value of an Items Group it belongs to. For example, labor cost for setting up a computer system can be a hidden Part. When user use this feature, make sure not to show individual item prices by using the Items Group facility. Items Group facility allows user to group a set of items together and only show one amount for the whole group. Thus avoiding the mismatching of totals.
- On Hand                 This is Quantity On Hand (stock on hand, stock level) which is useful when user wants to keep track of stock movement and control. This field can be used in conjunction with button  in the Sales Order Editor and Purchase Order Editor to perform Stock Control task.
- Rounding             This is a powerful facility for rounding the price before tax, price after tax or final price (tax and non tax). For further explanation please see Rounding Facility.
- Cost                      This field is the cost price for the Part. This field can be used in the Markup Equations as "cost".

Tax Rate	This field is the tax rate for the Part. If GST (or VAT) Tax or Two Tax systems are used, then this field is not directly used by tax calculation.
Markup Equation 1	
Markup Equation 2	These fields are equation fields for Markups. A list of variables which can be used in the equation are: cost - cost variable taxr - tax rate a - markup parameter A b - markup parameter B c - markup parameter C d - markup parameter D e - markup parameter E
Usr1, Usr2, Usr3	These are user defined fields. These spare fields are not used by the system. Use the screen <u><a href="#">Labels Administration</a></u> to change their labels.

## Tax/ Rounding Setup screen

This screen allows user to modify the tax and rounding settings use in the software. It is better to make the tax setup right at the first go. However it can be re-modified later.

### **Tax Setup**

Tax setup consist of selecting which tax calculation methods, specifying tax rate(s) and in some cases, selecting which default markup calculation options.

#### 1) Calculate Tax from Sales Price (USA or any GST, VAT Country):

This tax calculation method is described as follow (in simplified form):

$$\begin{aligned} \text{Price} &= \text{Cost} + \text{Markup} \\ \text{Tax} &= \text{Price} * \text{Tax\_Rate} \end{aligned}$$

In this method, only one tax rate for is used for the whole system. User only needs to set this Tax Rate. The check box to "Replace all Part records with new Tax Rate" must be checked. The field "Tax Rate" in the Part Editor screen is not used in this tax method.

#### 2) Calculate Tax from Cost Price (Australia):

The tax calculation method is described as follow (in simplified form):

$$\begin{aligned} \text{Tax} &= \text{Cost} * \text{Tax\_Rate} \\ \text{Price} &= \text{Cost} + \text{Markup} \end{aligned}$$

In this method, each Part in the system can have their own tax rate. For example, in Australia, the tax rate for software is 0.0, and for hardware is around 22%. Therefore the Tax Rate that user can set in this screen is only a "Default Tax Rate". This default tax rate will be assigned to a Part record when it is created. However, user can change the field "Tax Rate" for each Part using the Part Editor screen or the Supplier screen.

The actual tax rate which is used in tax calculation is the one specified in the Parts table.

User also has an option of selecting which "Default Markup Calculation" to use. Again the word "Default" is used to indicate that user can change the markup equations after it is set by the system during Part record creation.

The check box to "Replace all Part records with Default Tax Rate" should be set only when user decide to replace all Part records' field "Tax Rate" with this new Tax Rate.

#### 3) Two Tax System - GST and PST (Canada):

This tax calculation method is essentially the same as the first one (GST) except with an addition of another tax calculation.

$$\begin{aligned} \text{Price} &= \text{Cost} + \text{Markup} \\ \text{Tax 1} &= \text{Price} * \text{Tax\_Rate\_1} \text{ (Provincial Tax)} \\ \text{Tax 2} &= \text{Price} * \text{Tax\_Rate\_2} \text{ (Government Tax)} \end{aligned}$$

In this tax calculation method, user needs to specify two tax rates namely Provincial Tax and Government Tax. The name is not really important in tax calculation. Let us call them Tax 1 and Tax 2.


Tax 1 is calculated internally. And the Rounding Facility covers only Tax 1. Tax 2 on the other hand, is handled by an equation on the Main screen. The name of the field is called "Tax 2". Unfortunately, the rounding facility does not cover Tax 2. If user wants to use the Round After Tax option, the two taxes need to be combined (add them together) as one tax rate, and use the first tax calculation method instead.

The check box to "Replace all Part records with new Tax Rate" must be checked.

## ***Rounding Setup***

All the fields for rounding are explained below:

### Items Group Rounding Amount

When user insert an Items Group Boundary using the button  in the Main screen or the Sales Order Editor screen, this number is assigned to the newly created Items Group Boundary record. However, user can change it using the Item Editor screen.

### Default Item Rounding Amount

When user create a new Part record, this number is assigned to the Part record field "Rounding". However user can change the value of Rounding for a Part from Part Editor screen or the Supplier Editor screen. The full detail explanation of this rounding value with examples can be found in Rounding Facility.

When user change this value, the check box "Update all Parts records with Default Item Rounding Amount" is automatically checked.

### Rounding Option

Detail explanation of Rounding Option with examples can be found in Rounding Facility.

### Update all Parts records with Default Item Rounding Amount

When this check box is checked, the software updates all Part records in the database with this newly entered Default Item Rounding Amount.

## Rounding Facility

Rounding is a useful facility for simpler pricing value. Due to the multiple requirements from different users, the rounding feature is expanded to handle all those requirements. It is worthwhile for user to understand the rules and options of rounding, and select the most appropriate to use.

The best place to learn rounding is in the Part Editor screen. User can do rounding experiment (trial) in the screen and see the result instantly.

To disable this rounding facility, assign a value of 0.0 to field "Rounding".

The following are three **Rounding Rules**:

- (a) Digit 1 to 5      If a rounding value's first digit is between 1 to 5, then rounding is done on the multiple of the value. This is always a round up. For example: 0.1, 1.0, 10, 0.2, 2, 20, 0.25, 2.5, 25, 0.5, 5 and 50 are all handled by this rule.
- (b) Digit 6            If a rounding value's first digit is 6, then rounding is done on 5 or 9. This is always a round up. For example: 0.06, 0.6, 6 and 60 are all handled by this rule.
- (c) Digit 7 to 9      If a rounding value's first digit is between 7 to 9, then the price's same significant digit is replace by the rounding value. This is a kind of truncation. For example: 0.9, 9, 90, 0.95, 9.5 and 95 are all handled by this rule.

A table of examples are provided:

Round By	Rule Used	Example Values					
		56.87	187.45	352.60	71.97	44.05	6.77
1.0	(a)	57.00	188.00	353.00	72.00	45.00	7.00
2.5	(a)	57.50	187.50	355.00	72.50	45.00	7.00
0.5	(a)	57.00	187.50	353.00	72.00	44.50	7.00
6	(b)	59.00	189.00	355.00	75.00	45.00	9.00
0.6	(b)	56.90	187.50	352.90	72.50	44.50	6.90
9	(c)	59.00	189.00	359.00	79.00	49.00	9.00
0.95	(c)	56.95	187.95	352.95	72.95	44.95	6.95

The following are the three **Rounding Options**:

- 1) Before Tax      This is the most simple approach to rounding. Rounding is applied on the amount "cost + markup", which is before tax is added in the calculation. Using this option, the price before tax looks rounded, but the price after tax does not look rounded.
- 2) After Tax        Rounding is applied after tax is added in the calculation. Then the value for markup and tax is reverse calculated from this rounded price. Using this option, the price before tax does not look rounded, however, the price after tax looks rounded.
- 3) Final Price     This is the most sophisticated rounding method. Either one of the two options above is applied depends on whether tax is included in a sales. For example, if tax is included in a sales, then the option Rounding After Tax is used. If tax is not included in a sales, the option Rounding Before Tax is used. Using this option, the final price (tax included or excluded) will always looks rounded. However, the markups for the two cases (include and exclude tax) will be different.


An example of using GST Tax (e.g. USA) of 10%, and rounding value of 1.0. Price is equal to "cost + markup", tax is equal to "price \* tax-rate". Notice all numbers with underline are rounded numbers. If the case of "Final Price", there are two cases depends on whether tax is included or excluded in the final price.

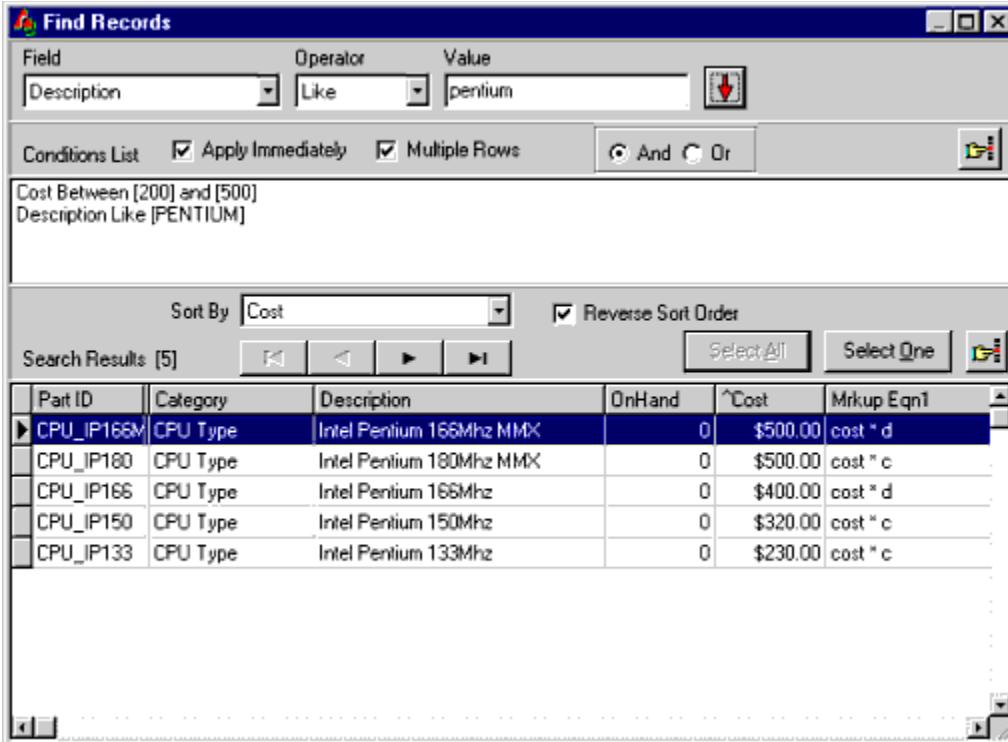
<b>Options</b>	<b>cost</b>	<b>markup</b>	<b>price</b>	<b>tax</b>	<b>price + tax</b>
No Rounding	\$45.67	\$20.00	\$65.67	\$6.57	\$72.24
Before Tax	\$45.67	\$20.33	<u>\$66.00</u>	\$6.60	\$72.60
After Tax	\$45.67	\$20.69	\$66.36	\$6.64	<u>\$73.00</u>
Final Price (no Tax)	\$45.67	\$20.33	<u>\$66.00</u>	-	-
Final Price (with Tax)	\$45.67	\$20.69	\$66.36	\$6.64	<u>\$73.00</u>

An example of using Australian Tax (tax on cost price) of 22% and rounding value of 1.0. Tax is equal to "cost \* tax-rate", price is equal to "cost + markup". Notice all numbers with underline are rounded numbers. If the case of "Final Price", there are two cases depends on whether tax is included or excluded in the final price.

<b>Options</b>	<b>cost</b>	<b>markup</b>	<b>tax</b>	<b>price</b>	<b>price + tax</b>
No Rounding	\$25.78	\$20.00	\$5.67	\$45.78	\$51.45
Before Tax	\$25.78	\$20.22	\$5.67	<u>\$46.00</u>	\$51.67
After Tax	\$25.78	\$20.55	\$5.67	\$46.33	<u>\$52.00</u>
Final Price (no Tax)	\$25.78	\$20.22	-	<u>\$46.00</u>	-
Final Price (with Tax)	\$25.78	\$20.55	\$5.67	\$46.33	<u>\$52.00</u>

## Find Record screen

The Find Record screen is used extensively in finding a record through button , in printing, in exporting and in records filtering (Supplier screen). It provides two functions: records filtering and records sorting.



The screenshot shows the 'Find Records' window with the following details:

- Field:** Description
- Operator:** Like
- Value:** pentium
- Conditions List:** Cost Between [200] and [500], Description Like [PENTIUM]
- Sort By:** Cost
- Reverse Sort Order:** Checked
- Search Results:** [5]


Part ID	Category	Description	OnHand	Cost	Mkup Eqn1
CPU_IP166M	CPU Type	Intel Pentium 166Mhz MMX	0	\$500.00	cost * d
CPU_IP180	CPU Type	Intel Pentium 180Mhz MMX	0	\$500.00	cost * c
CPU_IP166	CPU Type	Intel Pentium 166Mhz	0	\$400.00	cost * d
CPU_IP150	CPU Type	Intel Pentium 150Mhz	0	\$320.00	cost * c
CPU_IP133	CPU Type	Intel Pentium 133Mhz	0	\$230.00	cost * c

Picture of Find Record screen

### Record Filtering

The upper part of the screen allows user to filter records. By providing appropriate condition(s) (single or multiple), user can reduce the number of records displayed at the bottom of the screen.

The steps to filter record are as follow:

1. If user decides to have multiple conditions, the check box "Multiple Rows" must be ticked (checked). If there are three or more conditions to be entered, it is best to un-check the check box "Apply Immediately".
2. For each condition user wants to add, first select a "Field" from the list of fields. Then select an "Operator" from the list of operators. Then fill in the value(s) on the right hand side of the Operator. Click the button  to insert the newly created condition into the Conditions List.
3. If the check box "Apply Immediately" is not ticked (checked), user must manually select the pop-up menu "Apply" to execute the record filtering process.

If the Conditions List is too restrictive, no record is displayed under the label "Search Results".


In the list of Operators, the Operator "Like" is a useful feature for searching string fields like Part's Description, Customer's Contact, Customer's Company, etc. For example, a condition "Description


Like [PENTIUM]" matches all Parts that have the word "pentium" in the field Description.

A special character "%" can be used to limit the matching to one side and not the other side. For example, a condition "Description Like [PENTIUM%]" matches all Parts that starts with word "pentium" in the field Description.

### **Record Sorting**

Record sorting is a simple task. The list of records (under the label Search Results) can be sorted by either selecting the "Sort By" list or by clicking the column header.

The navigation buttons  can be used to speed up navigation process. For example, if user knows the record is near the bottom of the table, just select the button

 to quickly go to the bottom of the table.

The button "Select All" returns all records match the Condition List to the calling module. The button "Select One" returns only the selected record to the calling module.



## Item Editor screen

Item Editor screen allows user to change the quantity, description, cost, price, rounding and to show or hide during printout.

The screenshot shows the 'Item Editor' dialog box. At the top, there are 'Close' and 'Cancel' buttons. Below them, the 'Item Data' section contains three text boxes: 'Part ID' (VDD\_DIA642V), 'Supplier' (My First Supplier), and 'Category' (Video Cards). The 'Description' section has a text area containing 'Daimond Stealth64 ZVRAM' and a checked 'Show Item' checkbox. The 'Quantity' section has a spinner box set to '1', a checked 'Auto Calc' checkbox, a 'Calculate' button, and a 'Rounding' field set to '\$0.00'. The 'Show Cost' section has a checked 'Show Cost' checkbox, a 'Price' field set to '\$400.00', a checked 'Include Tax' checkbox, and a 'Total Amount' field set to '\$522.00'. At the bottom, there are three empty text boxes labeled 'Usr 1', 'Usr 2', and 'usr 3'.

Picture of Item Editor screen

When user create an Item from a Part, the created Item gets all its value from the Part. However, it is a separate entity from the Part. When user makes any changes in an Item, the changes will not be apply to the corresponding Part record.

All the fields in the Item Editor screen are explained below:

Part ID	Derived from Part record, cannot be changed.
Supplier	Derived from Part record, cannot be changed.
Category	Derived from Part record, cannot be changed.
Description	A description for the Item.
Show Item	Whether to show or hide the item when printing report.
Quantity	The quantity of the item.
Auto Calc	When checked, the value for fields Cost and Price are automatically obtain and calculated from the corresponding Part record. When un-checked, user can manually change the field Cost and Price.
<u>Rounding</u>	Rounding value.
Show Cost	To show or hide the field Cost in the editor.
Price	The price of the item.
Include Tax	Whether to include or exclude tax in the total.
Total Amount	The total amount of the item. If tax is included, this is equal to "(Price +

Tax) \* Quantity. If tax is not included, this is equal to "Price \* Quantity".

Usr1, Usr2, Usr3

These are user defined variables. They are spare variables which are not used by the system. User can make use of these variables for any purpose. Their labels "Usr 1", "Usr 2" and "Usr 3" can be changed in the Labels Administration screen.

The word "Summary" as the Category name for Items Group can be changed. The place to change the word is in the Labels Administration screen, under Category "Systems", and near the end of the list called "Label for summary". User can change both the Label and Column Label to a different word.

## Suggestions and Feedback

If you have a feature which you like to include in the software, or an idea to improve the software, your inputs are always welcome.

An acknowledgment list is provided in the main menu "Help - Acknowledgment" to show our appreciation to all users who contributed their fine suggestions.

Please kindly send any suggestions and feedback to **<handyquote@agilecom.com>**. In most cases, you will receive a personnel response (not automated response) from us.

## Bugs Report

If you suspect any kind of abnormality in the software, please kindly report it by sending an e-mail message to **<handyquote@agilecom.com>**. In most cases, you will receive a personnel response (not automated response) from us.

In a Bugs Report, please describe the problem: what happened, and how did it happened (what you did). Please let us know what version you are running and which operating system you are using.

## **Backing Up Data**

User is advised to do daily backup of the data directory. Prevention is better than cure. In standard installation, the data directory is within the installation directory under a directory name "Data".

In the event of data corruption, first quit all Handy Quote program. Data can be restored by overwriting all the files in the directory "data" by the backup files.

In the event of hard disk failure, user must re-install Handy Quote, and replace all the files in the directory "data" by the backup files.

## Price Level

Price Level is to provide multilevel pricing facility (markup / profit margin). The default data comes with four levels namely "(standard price)", "Price Level 1", "Price Level 2" and "Price Level 3".

Price Levels Table	(a)	(b)	(c)	(d)	(e)
Price Level	V.High	High	Medium	Low	V.Low
(standard price)	0.7	0.4	0.2	0.15	0.1
Price Level 1	0.5	0.35	0.15	0.13	0.09
Price Level 2	0.4	0.3	0.12	0.11	0.07
Price Level 3	0.3	0.25	0.1	0.08	0.05

Picture of Price Level Table

Each Price Level provides five Markup Parameters namely A, B, C, D and E. These parameters can be used inside a Markup Equation. The labels for those Markup Parameters are "V.High", "High", "Medium", "Low" and "V.Low". These labels are just labels, and can be changed in the [Labels Administration](#) screen.

Let us select Markup Parameter "C" and closely look at it:

Price Level	Markup Parameter C
(standard price)	0.2
Price Level 1	0.15
Price Level 2	0.12
Price Level 3	0.1

From the above table, when "Price Level 1" is selected, the value for Markup Parameter C becomes 0.15. When "Price Level 3" is selected, the value for Markup Parameter C becomes 0.1.

For example, let us use markup equation of: "Cost \* C", and let Cost equals to \$100.00, the following table tabulates the result:

Price Level	C	Markup
(standard price)	0.2	Cost * C ==> \$100 * 0.2 ==> \$20
Price Level 1	0.15	Cost * C ==> \$100 * 0.15 ==> \$15
Price Level 2	0.12	Cost * C ==> \$100 * 0.12 ==> \$12
Price Level 3	0.1	Cost * C ==> \$100 * 0.1 ==> \$10

## Labels Administration screen

The purpose for this screen is to allow user change most labels, buttons, fonts and messages used in the software. At this moment, most messages are still hard coded in the software, so let us ignore the messages part.

The way to access to this screen is via the menu "Setup - Fields, Labels, Buttons..." in the Main screen.

The best way to explore or find any labels or fields used by the system is to select the pop-up menu "Expand All". Once all categories all expanded, user can browse through the hierarchical structure more easier.

The most important categories are:

- Company - This include company name and address.
- Orders/ Quote - This include all the fields in the Sales Order Editor screen. For example, fields "Tax 2", "Inc. Tax 2", "Sub Total", "Items Total", "Sales Tax" etc. can all be found here.
- Screen Font - There are four screen fonts which can be modified.
- Systems - This include many labels such as "Summary", "Tax", etc.

User are free to explore all the other categories. However, please do not over do things. The help file and any technical support from us are still referring to the original labels. There could be a misunderstanding if the labels which are referred in the help file or from technical support team are not the same.

## Contact

There are many ways to contact AGILE Computer Enterprise. The first two approaches are preferred:

- 1. E-mail:** info@agilecom.com
- 2. Facsimile:** +612 4955 6268 (country code: 61, area code: 2, local facsimile no: 4955 6268)
- 3. Post Mail:** PO Box 304,  
Jesmond, NSW 2299  
Australia
- 4. Telephone:** +612 4951 1100 (country code: 61, area code: 2, local telephone no: 4951 1100). Please call between 9am to 5pm Sydney - Australia time.
- 5. WEB Page:** <http://www.agilecom.com>



## **Password**


The system allows user to secure the database using a password. To set a password, use main menu "Setup - Password" to open up the Set New Password screen. In the screen, user can have a choose of having "No Password" or enter a new password.


When a password is set, user will be prompted with a password when the software is starting up. If the user failed to provide a password, the system will go into Secure Data mode. In that mode, user is given limited access to the system.


To exit from Secure Data mode, if a password is set, the user is prompted to enter the password. If user failed to provide a password, the system will remain in the Secure Data mode.

## Sales Order Editor screen

This screen provides navigating, searching, editing, deleting and printing of Sales Order records. There is one important operation which is not provided in this screen is the ability to create a new Sales Order record. To create a new quote / order record, please see [How to create a new quote / order](#).


The button  beside a field is to provide a direct access to the field's editor screen. For example, if user clicks the button

 beside the field Type, then the screen Sales Type Editor is opened up.

**Important note:** *If user changes any currency fields: Paid, Items Total, Delivery Charge, Discount and Sub Total, please remember to click the button  to save the record or the button Re-Calc to recalculate the totals. If user does not do that, some calculation is not performed and therefore some totals will be incorrect.*

This screen is a more suitable place for updating quote / sales order / invoice records then the [Main](#) screen.


The program does a complete recalculation of all items price and totals using the latest pricing data when user changes the value of the field [Price Level](#)(and change it back again). This feature is useful when user wants to update all items pricing and totals in a quote / sales order / invoice with the latest pricing data.

To automatically update the stock quantity (quantity on hand) based on Items sold in a Sales Order, user can use the button  to automatically updates the field quantity (field On Hand) for all related Part records. For a more detailed description, please see [How to adjust stock level](#).

The pop-up menu Export Order Items can be used to export all Items from Sales Order records into a CSV format file. The file can then be imported into any spreadsheet for further analysis.

## Customer Editor screen

The purpose of this screen is to provide creating, editing, deleting, reporting functions on customer records.


This screen can be access from the Main screen (menu Sales - Customer) and Sales Order Editor screen (button  besides the field Company).


The report from pop-up menu "Print Report" is a summary of Sales for each Customer. Give it a try to see whether it is useful.

## Purchase Order Editor screen


This screen provides navigating, searching, inserting, editing, deleting and printing of Purchase Order records.

The pop-up menu "Auto create from Sales Orders" is useful for converting multiple Sales Orders into one or more Purchase Orders. For example, at the end of a day, user (store owner) can generate Purchase Orders for all Sales Orders being created since the morning. In the screen Find Records, user should specify a range of Order ID (from and to) from which Purchase Orders should be created.

The button  beside a field is to provide a direct access to the field's editor screen. For example, if user clicks the button

 beside the field Supplier, then the screen [Supplier Editor](#) is opened up.

To automatically update the stock quantity based on Items sold in a Purchase Order, user can use the

button  to automatically updates the field quantity (field On Hand) for all related Part records. For a more detailed description, please see [How to adjust stock level](#).

The pop-up menu Export Purchase Items can be used to export all Items from Purchase Order records into a CSV format file. The file can then be imported into any spreadsheet for further analysis.

## Supplier Editor screen

The purpose of this screen is to provide creating, editing, deleting, reporting functions on Supplier records.

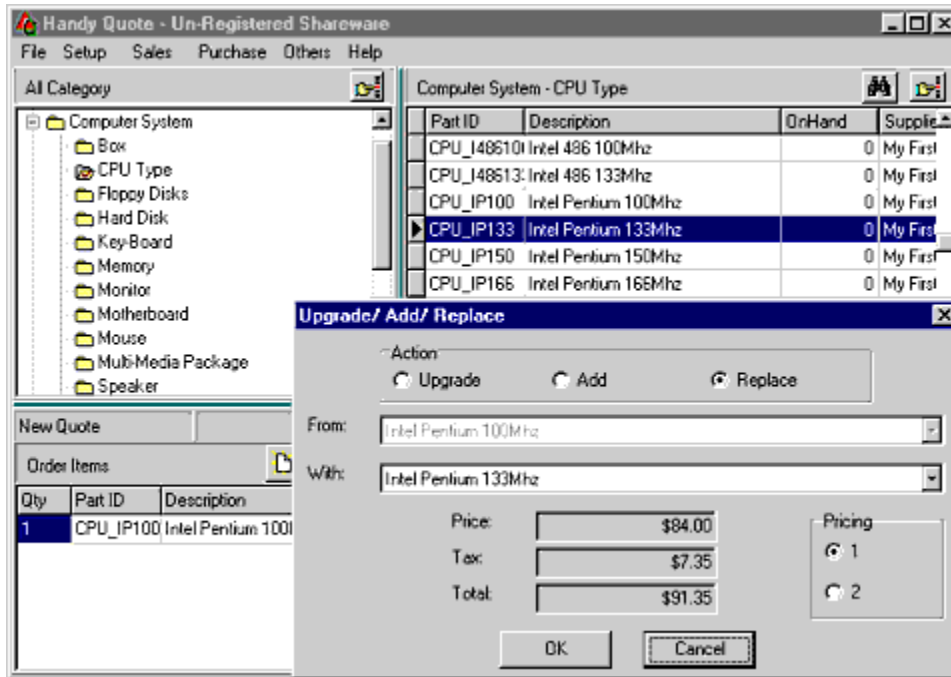
This screen can be access from the Main screen using the menu Purchase - Supplier.

The bottom part of the screen are a list of Parts supplied by the current supplier. To allow simple editing of Part records, a filter function is provided to limit the amount of records displayed at the bottom part of the screen. For example, if user wants to change the pricing for all CPU, just click the check box Set Filter, and specify a condition "Part ID Like [CPU%]" to only show all CPU Parts at the bottom part of the screen.

The report from pop-up menu "Print Report" is a summary of Purchase Orders for each Supplier. Give it a try to see whether it is useful.

## Upgrade/ Add/ Replace screen

When user tries to add another Part from the same Category into the Order Items list, the Upgrade/ Add/ Replace screen is displayed to prompt user whether the action is a replacement, or an addition or an upgrade.



Picture of Upgrade/ Add/ Replace screen

The best way to learn this screen is by using and and see its result.

## Report Editor

In Report Editor screen, user is allowed to change any report format in the system. This separate program can itself be a large and comprehensive tool for editing report format. However, only the essential features were implemented for Handy Quote V3.

A Report is divided into three levels namely Report Layout, Band Layout and Report Field. A Report Layout contains one or more Report Bands. A Report Bands contains one or more Report Fields. These three levels are in hierarchical order.

The best way to learn this Report Editor is to have both the Report Editor and the Handy Quote running. Select a particular report and do a print preview within Handy Quote. Then in the Report Editor, modify the selected report, and save the changes. Do a print preview again on the selected report to see the effect of the change.

### ***Report Layout Level***

In this level, user is allowed to change the orientation and margins of the report. Due to the fact that all length measurements are in % of the report width and length, therefore changing the orientation of the report means all the length measurements in the Report Field level need to be changed.

### ***Report Band***

A Report Band is a group of Report Fields. A band is always printed together (will not go over page). In this level, user is allowed to set the margins for the band as well as the Box Frame (borders).

### ***Report Field***

There are seven types of fields available under Report Field level. User can decide whether to show/hide a particular Report Field.

All the fields are explained:

Name	The name for the Report Field
Include Field	Whether to include or exclude the Report Field in the report.
Total Width	The total width (in Report Band width percentage) of the Report Field. If the Content Type of the Report Field is "R. Lbl Fld" or "L. Lbl Fld", then this width include the label width, plus the clearance between the label and the value, and plus the width value.
Content Type	This is explained below.
Label Text	If the Report Field is of type Data Field ("Field", "L. Lbl Fld" or "R. Lbl Fld"), then this is the Field Label. If Field Label is blank, then the label defined in the Setup - Fields/ Labels/ Buttons is used. More on this Label Text is explained below.
Label Width	The width for the label text. In some cases, the field Total Width is used instead of this field.
Label Font	The font used for this Label Text.
Value Font	The font used for displaying field value.
Box Frame	Borders for the Report Field.
Hori. Alignment	Horizontal alignment of the Report Field. If "Auto" is selected, the Report Field is printed in sequence, one after the other from left to right. If "Center" is selected, the Report Field is printed in the center of the report. If "Left"

is selected, the Report Field is printed on the left side of the report. If "Right" is selected, the Report Field is printed on the Right side of the report.

Use New Line When this check box is checked, the Report Field is always printed on a new blank line.

The five different Content Types of a Report Field are explained below:

Field The is called Standard Data Field. The label is printed on the top and the field value is printed below the label. In this Content Type, the Label Width is not used. Example is shown below:

**Company**  
Modern Book Store  
**Address**  
23 Hunter Street,  
Newcastle, NSW 2300  
Australia

L. Lbl Fld This is called Left Aligned Label Data Field. The label is printed on the left side and is left aligned. In this Content Type, the Label Width is used to define the width of the label. Example is shown below:

**Company** Modern Book Store  
**Addr.** 23 Hunter Street,  
Newcastle, NSW 2300  
Australia

R. Lbl Fld This is called Right Aligned Label Data Field. The label is printed on the left side and is right aligned. In this Content Type, the Label Width is used to define the width of the label. Example is shown below:

**Company** Modern Book Store  
**Addr.** 23 Hunter Street,  
Newcastle, NSW 2300  
Australia

Graphics User can display a BMP picture file using this Report Field. The name of the picture file should be assigned in the field Label Text. The picture file itself should be saved in the directory of Handy Quote. When the value of Total Width is set to zero, then, the width of the picture depends on the picture's own pixels size. When the value of field Total Width is greater than zero, the unit for the width is in percentage. When the value of field Total Width is less than zero, the unit for the width is in pixels. For example, If user has a 200 X 200 pixels BMP file, but only want to display half its size (which is 100 X 100 pixels), then set -100 to field Total Width. See [How to add your own company logo](#) for picture file names.

Label This is for printing Label. In this Content Type, Total Width is used instead of Label Width. So Label Width is not used. Label Font defines the font used in printing this label.

Text File In cases where a report needs to be printed with a lengthy text description, this Content Type can be used in that situation. The text to be printed is stored in a file. User then assigns the name of the file in the field Label Text. Again, the text file must be saved in the Handy Quote directory.

The Content Type "Label" is powerful in the sense that user can print Page No, Date and Filter Condition String. The string can be used inside the field Label Text are:

"@PAGE@" - Page number.

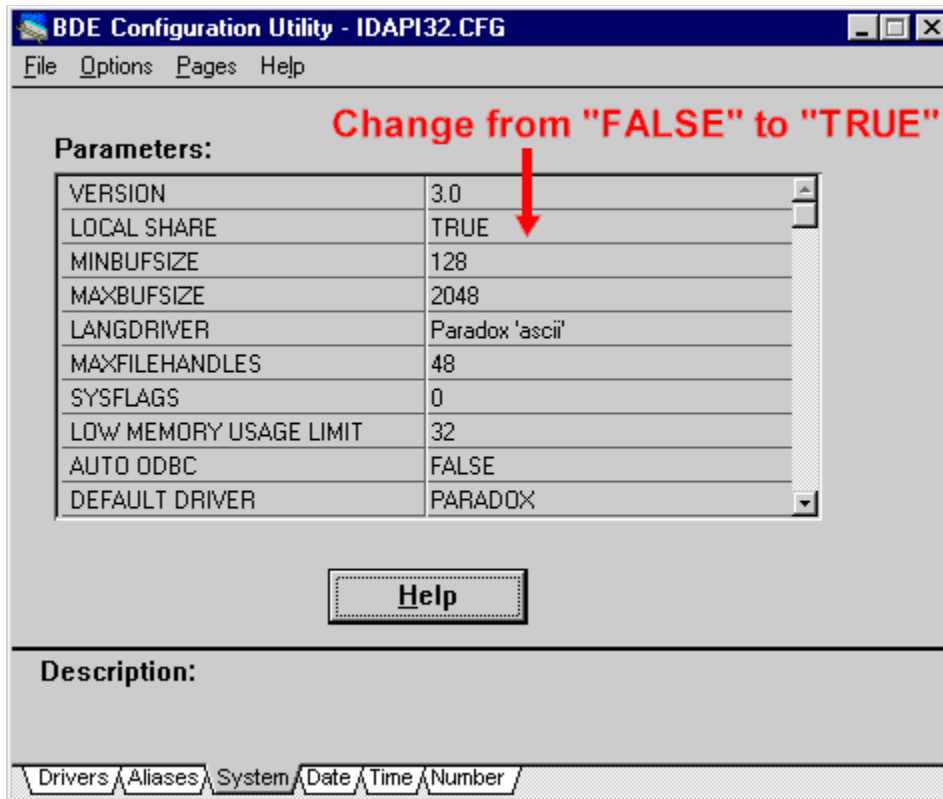


- "@RECPG@" - Record page number. This is useful for printing record (like sales order or purchase order) which can span multiple pages. When a new record is printed, this page number starts from 1 again.
- "@DATE@" - Print current data in short date format.
- "@COND@" - Print the Filter Condition String. A Filter Condition String is a list of text string displayed in the Find Record screen, under the label "Conditions list". When user specify condition is a Find Record screen, the same string is printed when this is in the field Label Text.

## Networking

To make Handy Quote V3 runs on a network environment, the following steps need to be followed:

1. Install Handy Quote V3 on each individual computer.
2. If you are running Peer-To-Peer (non-dedicated) networking, you need to run the program "BDE Configuration" and set the field "LOCAL SHARE" from FALSE to TRUE. Go to File menu and choose Save to save the changes. Then exit from the program. You need to do this for each individual computer.

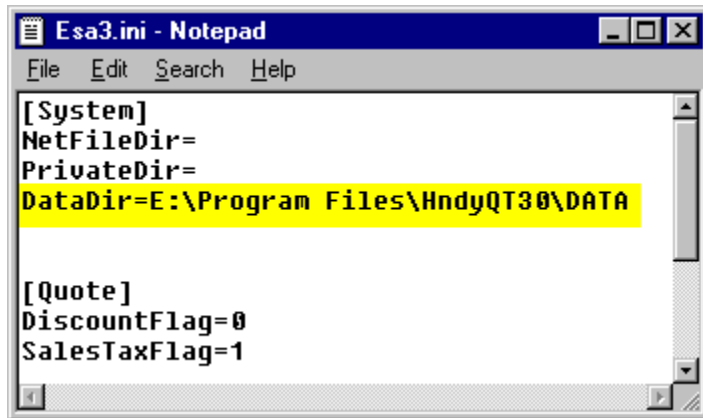


Picture of DBE Configuration

3. Identify the computer where the shared data directory is located. Use Microsoft Windows Explorer's button "Map Network Drive" to setup each individual computer so that all have access to the shared data directory.  
**Important Note:** The shared directory must be mapped from the root of the directory. For example, mapping path "\\MasterServer\C:\Program Files\HndyQT30\" as drive E: will not work. However, mapping path "\\MasterServer\C:" as drive E: will work.
4. For each computer, you need to change one parameter in the initialization file "ESA3.INI". The parameter "DataDir" need to be set to the directory path of the shared data directory. The steps to do it are as follow:
  - I. At Windows' desktop, click the "Start" button, then choose "Run". In the Run Dialogue, type in "notepad" to run the program "Notepad".
  - II. Within the Notepad program, go to File menu and click Open. Change the field "Files of Type" from "Text Documents" to "All files (\*.\*)", then go to the directory where HANDY

QUOTE V3 is installed. Select the File ESA3.INI and open the file.

- III. Find the string "DataDir=" (Picture shown below), and replace the right hand side with the Path where the shared data is kept. For example, if the shared data files are stored in E:\Program Files\HndyQT30\DATA, then change to:  
DataDir= E:\Program Files\HndyQT30\DATA
- IV. Go to File menu and click Save to save the modified file, then exit from Notepad.
- V. The next time you run Handy Quote, it will use the shared data files.



```
[System]
NetFileDir=
PrivateDir=
DataDir=E:\Program Files\HndyQT30\DATA

[Quote]
DiscountFlag=0
SalesTaxFlag=1
```

Picture of ESAV3.INI file

## Add your own company logo

Most [Report Layouts](#) provide three picture positions (top left corner, bottom left corner and bottom right corner). User can either use all, some, or none of them. A picture must be in BITMAP format. The names for the three picture files are "TopLeft.bmp", "BotLeft.bmp", and "BotRight.bmp". These names can be changed using the [Report Editor](#).

For example, to place a picture on the top left hand corner, user needs to save the BITMAP file as "TopLeft.bmp" in the directory of Handy Quote. To remove a picture, either remove the file from the Handy Quote directory, or call it with a different name.



**Too much space between the picture and its borders.**



**Right spacing between the picture and its borders.**

Spacing between the picture and borders

The figure above shows user not to leave too much spacing between the picture (icon) and its borders. However, user might like to do that for the purpose of having larger spacing between the picture and its surrounding objects.

The default setting is that the picture will be printed in 96 pixels per inch resolution (the default screen resolution). For example, if user has a picture of size 96 X 96 pixels, then it will be printed as 1 inch X 1 inch on hard copy.

If user has a 600 X 600 dpi printer, printing the picture in 96 dpi will look jagged. An example to show how to increase the picture's printing resolution from 96 dpi to 384 dpi (X 4) is as follow:

Suppose user has a picture of 400 X 500 pixels (width X height). Using the [Report Editor](#), go to the particular Report Layout, and the particular Report Field, set the Total Width of the picture to -100. This way, the picture will be scaled down to 25% of its original size. It will look four times smaller, but with four times higher resolution.


## How to force recalculation of pricing


In the Main screen and the Sales Order Editor screen, when user changes the value of field Price Level (and change it back again) all the pricing data are recalculated from the Parts table. Thus the latest cost and markup data are used.

This is useful when pricing data are updated while a user is the middle of preparing a quote in the Main or in the Sales Order Editor screen.

## How to create a new supplier


To create a new supplier record, select menu "Purchase - Supplier" to go to the Supplier Editor screen.

In the Supplier Editor screen, click the button  to create a new record. Fill in all the necessary fields and click

 to save the record.


## How to create a new Quote / Sales Order


The steps to create a new Quote or Sales Order are:

1. Go to the Main screen.
2. Use drag & drop to fill in the Items Order list.
3. Select the pop-up menu "Make a New Quote..." in the area of Items Order list to create a new quote.
4. In the Sales Order Editor screen, fill in any changes, and select  to print.

## How to adjust stock level automatically

After making a sales order or a purchase order, user might want the program to adjust the stock level automatically - to decrease quantity on hand when processing sales orders, to increase quantity on hand when processing purchase orders.

In the screens Sales Order Editor and Purchase Order Editor, the button  can be used to automatically adjust the quantity on hand (field On Hand) in the Parts table.

After user has clicked the button, the record is said to be "Processed", and the check box beside it is checked. A processed record's items cannot be changed. To modify its Items, the record must be unprocessed. To unprocess an order (Sales and Purchase Order), click the button  again.



## How to import Parts data

To import Parts data into the software, use menu "File - Import Parts Data". There are altogether three different import formats. For a more detailed description, please see [Parts Import Format](#).

## How to obtain sales data for analysis

There are two kinds of data which user would like analyse: Sales Items and Purchase Items. The current version of Handy Quote does not provide any analysis tool. However, data can be obtained from Handy Quote via its export function. The exported files (in CSV format) can be imported into most spreadsheet for analysis.

The steps to obtain sales items data for analysis are as follow:

1. Go to screen Sales Orders Editor
2. Select pop-up menu "Export Order Items".
3. In the screen Find Records, specify the right conditions.

The steps to obtain purchase items data for analysis are as follow:

1. Go to screen Purchase Editor
2. Select pop-up menu "Export Purchase Items".
3. In the screen Find Records, specify the right conditions.

