NetFast!Pro Helpfile

Thank you for purchasing NetFast!Pro, the handy to use contact manager.
This contact manager can be used alongside SuperVoice and SuperFax, but can also be used as a stand alone product.(To send faxes you will need to use SuperVoice or SuperFax)

Once you have started the program, you will enter the main screen.
This screen is divided into a several sections:

ITMS Ltd.
P.O. BOX 375
Kingston
Surrey KT1 2YG
United Kingdom

tel(sales) +44 (0)181-549 1437
fax +44 (0)181-974 6574

Logging outgoing calls

NetFast!Pro is capable of logging outgoing calls.

Outgoing calls.

When you make an outgoing call, and you use supervoice, a small box will appear at the bottom of the screen. You can press start to start the timer and stop to stop the timer, or cancel if you do not want to have this call logged. A comment can be recorded about the call in the comment box.

If you are not using Supervoice to make outgoing calls, then the standard TAPI dialer will dial the number for you.

These calls are stored in the logfile of the TAPI dialer.

Importing Data from other databases

The import function imports data from other databases.
The import function currently only supports csv file format. (csv stands for Comma Seperated)

The format is described below:
All data for 1 record must be on 1 line.
At the moment you can only import 1 contact person per company.

The information should be in the following format:
company, address1, address2, town, county, postcode, country, main tel., main fax, remark, salutation, firstname, lastname, direct line, direct fax, homephone, mobilephone, email, comment

To give an example:
"ITMS Ltd","PO box 375","","Kingston","Surrey","KT1 2YG","UK","0181-549 1437","0181-974 6574","","","","","","","","","",""
As you can see, if a field is not being used you do not need to enter anything between the inverted commas.

The easiest way to do this is to import your data into a spreadsheet (Microsoft Excel for example), enter each field into a separate column, and then save as a .csv file.

The menu

The menu consists of the following topics:

File
-Import
With this option you can import external database files into your NetFast!Pro database.
-Export
With this option you can export parts of your NetFast!Pro database to external files.
When you have a certain part selected(with a search) you can go to the export option in order to export this part.
Only the fields that you have selected on the export screen will be exported.
The only format available at the moment is csv format. This is a comma seperated format.
The export file will be formatted as follows: "company name","department","",..... etc.
Csv is a format that can be imported by most available programs.
-Exit
This option allows you to exit the program.

Setup
-Outgoing Calls
This option shows you the setup how to make your outbound calls, and prefix for outbound dialing
-Email/Web browser
This option shows you the setup for the type of mail program/ Web browser in use
-Orders/Invoices/Products
This option takes you to the setup for the Orders/Invoices and Products
-Printing General printouts
This option takes you to the general setup for setting the margins on print outs
-Printing orders
This option takes you to the setup for printing the orders
-Printing Invoices
This option takes you to the setup for printing the invoices
-Define Fields
This option gives you the possibility to change the names of most of the fields used in the programme

Records
-New
In this option you can choose if you want to add a new company, or add an new contact to the current company
-Search
This option takes you to the search screen, where you can search for particular companies and/or contacts. When press on the go button, it will display all the records of the search that the program has found. You can then export or print this information for example.
-Delete
With this option you can delete a company or a person. When you delete a company, all the connected internet information, document information and orders/invoices are deleted.

View
-Call Log
This option shows you a log form outgoing calls
-Agenda
This option displays your agenda
-Order Without Invoices
This option gives you an overview of the orders, from which there are not yet invoices

generated.
You can also print this. If you wish set the margins for printing this, go to setup/printing/General printouts. When you print out the information, the telephone number of the company will also be printed out

-Not Paid Invoices

This option gives you an overview of the invoices which have not been paid yet.
You can also print this. To set the margins for the printing of this, go to setup/printing/General printouts. When you print the information, the telephone number of the company will also be printed out.

Help

-About NetFast!Pro

This option displays a screen that will tell you all about NetFast!Pro

-NetFast!Pro Help

This option launches the NetFast!Pro help

The Toolbar

The Toolbar consists of the following buttons:

Search
This option takes you to the search screen, where you can search for particular companies and/or contacts. For additional information about searching, please view Company Information and Contact Information

New
This option allows you to choose if you want to add a new company, or add an new contact to the company that is currently displayed on the screen.

Delete
With this option you can delete a company or a person. When you delete a company, the connected internet information, document information and orders/invoices are also deleted.

Agenda
This option shows you the agenda.

Log
This option displays a screen showing you a log of all the outgoing calls.

Print
With this option you can print parts or all the information of your database. When you select all records in the printout, all the records of the current search will be printed out.

Exit
This option exits the program.

Last Call
This option displays the last incoming call that was made since the program was started.

Help
This option opens the help file.

Outgoing Calls

Outgoing calls
NetFast!Pro can process the outgoing calls in three ways:
- Using SuperVoice (for dialing out and faxes)
- Using SuperVoice Pro (for dialing out and faxes)
- Using SuperFax (not possible to dial a out a number)
- Using TAPI (not possible to send faxes)

Prefix
This function allows you to add a prefix automatically when you are dialling a number.
When "Enable Prefix" is checked, the prefix is automatically dialed before the actual number.
When "Prompt for Prefix" is checked, a message box appears before the actual dialing, to ask if you want to have the prefix dialed before the number.

Setup Internet

Mail Program

This function allows you to select if you want to use Microsoft Internet Mail or another mailprogram.
If you use Microsoft Internet Mail, you have to specify the complete string before you can begin. To do this you have to go to the properties of Microsoft mail and follow these steps:
Press <START> button
select 'SETTINGS'
select 'TASKBAR'
select 'START MENU PROGRAM'
select 'ADVANCED'
doubleclick on 'PROGRAMS'
highlight 'INTERNETMAIL'
click right button
select 'PROPERTIES'
select 'SHORTCUT'
highlight the string in 'TARGET'
click rightbutton
select 'COPY'

If you then launch NetFast!Pro, select SETTINGS and click on the E-mail/Intern button and place the cursor in the MAILPROGRAM window, you can click the right mouse button and paste the string in.

Once you have done this, when you use internet mail, the program will be launched automatically, and it will create a new message.

When using any other mailprogram, only the program will be started, but it will not create a new message automatically.

Web Browser

When you use Microsoft Internet Explorer, Microsoft Internet explorer is launched, and it goes automatically to the specified webpage or other internet site.

When you use another Web browser, the browser is launched, but will not go to a specified web page.

Setup Orders and Invoices

The Setup Orders and Invoices can be divided into a number of sections.
These sections are described below.

Order and Invoice Numbers

In this section you can specify the next order and invoice number which will be generated when you add an order, or generate an invoice from an order. NOTE: It is not possible to generate an order number that is lower than the previous order that was generated.

VAT Codes

Most of the products you are selling do have VAT. VAT can sometimes change. For this we use VAT codes. When you have a product you can specify which VAT code you want to use for this. When you place a product in an order, this VAT code is translated into a percentage.
When VAT percentages change, you only have to change the VAT codes setup.
Also, when VAT percentages change, the orders that were generated before the changes were made remain at their previous level.
Some countries use 3 different VAT percentages, some use 2. For this reason we have put in 3 different vat scales: 0,1 and 2.
VAT 0 is used as the 0% percentage code, in case you export your products.
VAT 1 is mostly used (if this appllicable in your country) for the lower VAT tarif. In countries where this is used, it is normally used for primary goods such as food and books.
VAT 2 is used most commonly. This is the standard rate which applies to all normal UK trading.

Currency Symbol

The currency symbol is the symbol you use to display money. This is used in the orders, invoices and other screens where money is used

Products

Every product consists of the following:
-Product number- this is a unique identifier for this particular product.
-Product name- this is the description for your product
-Price per unit- this is the price per unit of your product.
NOTE: you need to specify the price here excl. VAT, as VAT is always calculated in the order.
-VAT code- you must specify either 0,1 or 2.
NOTE: if you have the same products, but export them and also sell them, it is most practical to include them twice in your database. The same applies if you sell products at a lower price to certain customers.
The best way to do this is to create separate groups. For example:
1000-1999 products with normal prices
2000-2999 products for export
3000-3999 products with lower prices
This way it will be easier for you to keep track of what you have sold, and at what cost.

Payment Types

In this section you can set the payment types that you will be using. This will make it easier to keep track of the volume of goods that you have sold and also the particular mode of payment.

Setup lists

In here you can set the margins for printing of all the information, except the Orders and Invoices.
All sizes are in millimeters.

Company Information

As you would expect, this consists of information about the company.

On the right side of the screen you can see a box labelled ID number. This number will always be unique to a particular company, even after you have deleted records.

All the information in the Contact Information section can be changed per contact, except for the main telephone and main fax number. This is the same for every contact in the same company

If you want to search any of the fields contained in the "Company information", it should be noted that all fields are searched in the following way, with the exception of the "Remark" field:

If you search for a company by entering "Ele", then it will display any record whose company name starts with "ele", but will not display any companies that have "ele" anywhere other than the start of the title.

Example:
search on companyname = "ele"
Found: <u>Ele</u>ctronic, <u>Ele</u>ctroworld
Not found: Future <u>Ele</u>ctronics, Compo-E<u>le</u>ctronics

The "Remark" field is an exception to this, in that you can search on characters that appear at any point in the string.
example:
search on remark = "dealer"
Found: main <u>dealer</u>, small <u>dealer</u>
Not found: Any record without dealer in the field "Remark"

Contact Information

All the information in the Contact Information section can be changed per contact, except for the main telephone and main fax number. This is the same for every contact in the same company

If you would like to perform a search on any of the fields within "Contact information", you should note that all fields are searched in the following way with the exception of the "Comment" field:

When searching for a record using the field "FirstName" , if you search by entering "To" then it will display any record which starts with "To", but not any records which have "To" anywhere else in the company name.

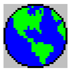
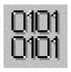
Example:
search on first name = "To"
found: <u>To</u>ny
not found :An<u>to</u>nio

The "Comment" field is an exception to this, in that you can search on characters that appear at any point during the string, and not necessarily just at the beginning.

Example:
search on remark = "Sales"
found: Main <u>sales</u> dept,   Small <u>sales</u> dept.
not found: Anything not containing the word "sales" in the field "comment"

Internet

In this section you can add Internet Site information related to your company.
You can add, edit or delete this Site information.
To give you a hand with the Site addresses, we have added in two buttons for the most common addresses:

 this adds the text 'http://www.' to the textbox.


this adds the text 'ftp://ftp.' to the textbox.

In Setup Web Browser you can select the type of Web Browser you want to use.

Once you have selected your Site information, and press the  button on the main screen, the specified Web Browser will be launched, and if you use Internet Explorer TM, it will make an attempt to go to the specified site.

Documents

With the Documents function, relevant documents can be associated with your contacts, for example any correspondence you may have had with them.
You can add, edit, delete or open a document connection.
When you press add or edit, a small screen wil appear in which you can specify the correct file and the program to run it with.
When you press on open (or a double click on the correct line) NetFast!Pro will attempt to launch the specified program displaying the specified file.

Notes

In this section, you can keep a record of notes relating to conversations or transactions.
To insert the day and time, you press on the day/time button.
When the screen is full, vertical scrollbars will automatically appear.

The Agenda

The agenda allows you to plan and keep track of the things you need to do.

When you want to add a to-do, simply use the mouse to highlight the correct date in the agenda. Then click on 'Add To Do'

Adding or editing a To Do:
The 'from' and 'till' times are automatically set to whatever the time is as you are setting up your schedule, however you have the ability to edit these times.
You have a choice of actions you can do:

- Appointment
- Call
- E-mail
- Fax
- Other

and these can be prioritised as either :

- Low
- Medium
- High

When call is selected, a small box appears with a choice of phone numbers (home, work mobile) . When you click on the relevant icon, the phone number information will be pasted from the record that is currently open.

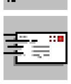
This will work in a similar manner for both fax and e-mail.

When you click on person and company, the contact and company name will be inserted in the comment box.

How to work with the To Do's
After you have added a To Do, the relevant information will be displayed on the screen.
An icon will appear, according to the type of To Do you have selected.
When you click this icon, the following actions will occur:

 The number will be dialed.

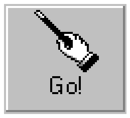
 The program will call supervoice or superfax, and prepare a fax for you.

 The program will launch the email program.

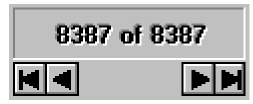
On the right side of the screen is a ✗ . After a To Do has been performed and you click on this, it will turn into a
✓ . This allows you to keep track of the to dos that have been carried out and the ones that still remain.

How To Search

When you do a search, you can search on company information, contact information, or a combination of both.

When you click on the 

button, the program will attempt to search for companys and contacts which meet the specified criteria.

When there are records found, you can browse through these with the 

buttons in the right hand upper corner of the main screen.

You can also carry out other functions rather than just browsing:

- export to a csv file, so you can edit it in a word processor, or you can use it for a fax or a normal mail shot.
- delete all the information of all the companys/contacts who meet the specified criteria
- print information of all the companys/contacts who meet the specified criteria.

Click on one of the topics below for more information about how to search efficiently:

- More information about efficient searching on Companys.
- More information about efficient searching on Contacts.

Adding or Editing Orders

In this screen you can add or edit the order/invoice.
NOTE, once the invoice is paid, it is not possible anymore to modify the invoice.

Order number
The order number is generated automatically. If you want to change the next order number, then you can do this in setup:orders/invoices.
NOTE: it is not possible to generate a higher order number than the previous one.

Order Date
This orderdate is generated automatically. This is always the current day.

Invoice Number
This invoice number is generated automatically. If you want to change the next invoice number, then you can do this in setup:orders/invoices.

Invoice Date
This date is automatically generated when you press the button 

on the mainscreen.

Contact
This is the name of the contact which currently is on the main screen.
This, and the company address will be printed as the mail address on the orders and invoices.

Delivery address
This is the address which will be printed as the delivery address on the orders and the invoices.

Products
Here you can add, edit or delete products for your product list.
The product database is separate from the database which holds the invoice list. Therefore if a product is altered at all in the product database any invoices holding the product information will retain the old detail.

Notes
This line will be printed on the last line before printing the subtotal.
On this line you can print information specific to this particular order/invoice.

Description
This allows you to add a small description relating to the invoice on the screen.

Payment date
This date will be generated when you press the 

button on the main screen.

Payment details
You can enter details about the payment (credit card number etc) here.
You can enter it on this form, or on the form which appears when you press the 

button on the main screen.

Subtotals

The subtotal is the total of the order before VAT has been added.
Below the subtotal are 3 other boxes. These contain 3 different rates of VAT.
Below the subtotal and the VAT percentages you see the end total, this is the sum of the subtotal and the VAT.

Setup Print Layout for Orders

In this form you can setup how the order is printed out.

Objects to place
All these objects can be placed on the screen where you want.
If you double click on these objects you can modify their appearance such as font, color,size etc.
When you double click on the headers and footers, you can modify the text of the header and footer.

Header 1 -
Header 4 These are the headers for the printout. These are the same for every order.

Mail Address This prints the mail address

Delivery Address This prints the delivery address

Form Type+ nr of Copies This prints the word 'order' and the words 'Copy .. of ..' if more than 1 is printed.

Body
This is the actual body of the order .
The following information is printed:
- order number
- order date
- the products on the order
- the subtotal
- the vat's
- the end total

Footer 1 -
Footer 4 These are the footers for the printout. These are the same for every order.

Setup Print Layout for Invoices

In this form you can setup how the invoice is printed out.

Objects to place
All these objects can be placed on the screen where you want.
If you double click on those objects you can modify their appearance such as font, color or size etc.
When you double click on the headers or footers, you can modify the text of the header and the footer.

-


These are the headers for the printout. These are the same for every invoice.

This prints the mail address.

This prints the delivery address.

This prints the word 'invoice' and the words 'Copy .. of ..' if more than 1 is printed.

This is the actual body of the invoice.
The following information is printed:

- invoice number
- invoice date
- the products on the invoice
- the subtotal
- the vat's
- the end total

-


These are the footers for the printout. These are the same for every invoice.