



User Guide
For

QuoteNerd™ Lite

Release 1.8.x

For Palm OS

Congratulations on the purchase of your new **QuoteNerd™** application for Palm OS. You have made a wise business investment; one that will pay for itself quickly and continue to generate more business for you in the years to come.

This manual will give you all of the information needed to operate and customize the QuoteNerd™ for your business, permitting you to provide fast, professional looking services for your paying clients, both existing and future. Gabriel strongly recommends that you take the time to go through this manual before using your QuoteNerd for business purposes. There are many features and settings that can be customized to make using your QuoteNerd™ as simple as operating a handheld calculator.

We are confident that once you've read this manual and started using the QuoteNerd in your day to day business, you'll wonder how you ever worked without one!

Gabriel Contact Information:

We at Gabriel Software welcome comments and suggestions about anything relating to our products or services. You can contact us at:

Gabriel Software
437 Ancaster Ave,
Ottawa, ON
CANADA K2B 5B6
Fax: +1-613-820-7256
Email: support@gabrielsoftware.com
Web: www.gabrielsoftware.com

Introduction.....	5
What is a QuoteNerd™?	5
Assumptions.....	5
Getting Started	5
Installation	5
First Time Using QuoteNerd	6
Registering your QuoteNerd Software	6
Customizing QuoteNerd	7
Company Information.....	7
Preferences.....	8
Setup a Default Job Template	8
Organization of the QuoteNerd	10
Forms Hierarchy.....	12
Managing Client Jobs	14
Create a New Job	14
Add Line Items to a Job	16
Managing the Items Catalog	30
Creating Item Categories	30
Assigning Items to a Category.....	32
Managing Job Templates.....	34
Tips & Shortcuts	35

Notices

Copyright

Copyright © 2003, 2004 Gabriel Software or its subsidiaries. All rights reserved. **PocketNerds™** and **QuoteNerd™** are trademarks of Gabriel Software or its subsidiaries. References to **QuoteNerd** in this manual refer to the **QuoteNerd Lite** edition of the **QuoteNerd**. All other product and brand names identified in this book may be trademarks or registered trademarks of their respective owners. They are used in this book in an editorial fashion only. No such use, or the use of any trade name, is intended to convey endorsement or other affiliation with this book or Gabriel Software unless so explicitly stated.

No part of this publication may be reproduced by any means without written permission from Gabriel Software. Making copies of any part of this book or the software provided by Gabriel Software for any purpose other than your own personal use is a violation of Canadian copyright laws and international treaty.

The **QuoteNerd™** software program, its screens, icons, sequence and organization are copyrighted materials of Gabriel Software. They may not be copied or duplicated in any medium for any purpose without the express written authorization of Gabriel Software.

Disclaimer and Limitation of Liability

Gabriel Software and its subsidiaries assume no responsibility for any damage or loss resulting from the use of this guide.

Gabriel Software and its subsidiaries assume no responsibility for any loss or claims by third parties which arise though the use of the software. Gabriel Software and its subsidiaries assume no responsibility for any damage or loss caused by deletion of data because of product malfunction or misuse, dead battery, or repairs. Be sure to make backup copies of all important data on other media to protect against data loss.

Revisions

The information contained in this manual is subject to change. Revisions to this manual or new editions may be issued as are deemed necessary by Gabriel Software. The information herein is believed to be, and is presented to be, accurate in all respects. However, Gabriel Software cannot assume any responsibility or liability for any consequences resulting from the use or misuse of the software or this manual.

IMPORTANT: Please read the **Software License and Limited Warranty** accompanying this product before using the QuoteNerd™ software. Using the **QuoteNerd™** software indicates that you accept the terms of the **Software License And Limited Warranty**.

Introduction

What is a QuoteNerd™?

QuoteNerd is a handheld application designed specifically for small to mid-sized businesses that need to create line item based Estimates, Quotes and Invoices on a per client or job basis. Depending on the business, line item charges may be for materials or services provided, or both. Unlike many quoting and invoicing applications, QuoteNerd supports both material and service charges per line item.

Assumptions

This manual assumes that the user is familiar with the general usage of a Palm OS based handheld computer (Handheld) also commonly referred to as a Personal Digital Assistant (PDA). Basic usage instructions can be obtained from the User Guides that are supplied with your Handheld.

Getting Started

Installation

QuoteNerd is distributed in Zip archive file format. The QuoteNerd zip file contains this manual, a Software license agreement, and the QuoteNerd PRC file to be installed on the Handheld. Read the license agreement before installing and using the QuoteNerd tool.

To install QuoteNerd on your Handheld, extract the PRC file from the zip archive. Normally, Palm applications are stored in the Palm Add-on folder which is usually located in C:\Palm\Add-on. If your Palm desktop software has been installed correctly, you need only double click on the QuoteNerd PRC file and the Palm Install Tool will prompt you to specify the Handheld user name on which to install the QuoteNerd application/tool. Once you have completed this step, QuoteNerd will automatically be loaded to the Handheld the next time you perform a Hotsync with the Handheld in the USB or Serial cradle.

Once QuoteNerd is downloaded to the Handheld, you need only select the QuoteNerd icon from the Handheld application list and installation is complete. QuoteNerd will create all of its internal databases on the Handheld when it is activated for the first time.

QuoteNerd Lite has an **unlimited** trial period. After approximately two weeks of use, an unregistered copy of QuoteNerd Lite will remind you to register each time the application is launched. A registration code for your handheld can be obtained by purchasing a **QuoteNerd Lite** software license.

The QuoteNerd Company name parameter cannot be changed without supplying a valid registration code. Other than that, an unregistered version of **QuoteNerd Lite** is fully functional.

First Time Using QuoteNerd

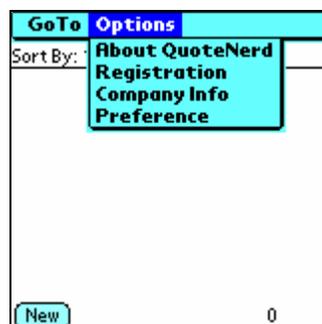
An unregistered copy of **QuoteNerd Lite** will show the **About** form each time it is launched:



After dismissing the **About** form, the Registration form will be displayed:



The **About** and **Registration** forms can also be viewed from all major QuoteNerd forms by selecting the options menu:



Registering your QuoteNerd Software

Once you have purchased a user license for the QuoteNerd software, you will be issued a registration key. The registration key can be entered in the **Registration** form. The **Registration** form also gives you the option of changing your Company name. The Company name is used in the printing of Quotes and Invoices, so you will want to change it when registering QuoteNerd. The Company name can be changed at any time via the **Registration** form if a valid registration key is provided. This is the only way to change the Company Name.

The registration key is based on the Handheld user name on which QuoteNerd is installed. Thus each key allows registration on only one Handheld. You can determine your Handheld user name by starting the HotSync application:



The user name is displayed in the upper right hand corner. In this example the Handheld user name is 'rcurtis1'.

Customizing QuoteNerd

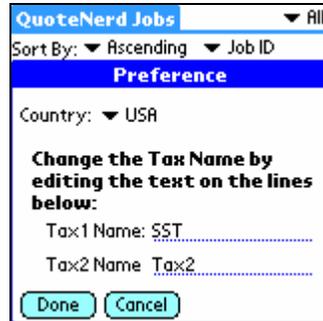
The first thing to do when starting QuoteNerd (other than registering it if you have a registration key) is to enter your company information and general preferences. Both of these actions can be performed from the Options Menu shown above.

Company Information

Company	
Name:	Unregistered
Street:
City:
State:
Zip:
Country:	USA
Phone:
Fax:
Email:
<input type="button" value="Done"/>	

Once you have registered QuoteNerd, the Name field will display the name that you entered in the Registration form. The Country field is set via the Preferences form described below. All other information regarding your company can be changed at any time in this form. Modifying the company information is best done using the Palm virtual keyboard.

Preferences



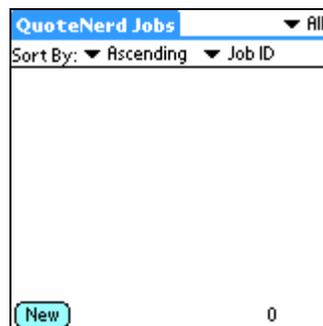
The screenshot shows the 'QuoteNerd Jobs' preferences window. At the top, there is a title bar with 'QuoteNerd Jobs' and a dropdown arrow. Below the title bar, there are two dropdown menus: 'Sort By: Ascending' and 'Job ID'. A blue header bar contains the word 'Preference'. Underneath, there is a 'Country: USA' dropdown menu. A bold instruction reads: 'Change the Tax Name by editing the text on the lines below:'. Below this instruction are two text input fields: 'Tax1 Name: SST' and 'Tax2 Name: Tax2'. At the bottom of the dialog are two buttons: 'Done' and 'Cancel'.

Select your country of origin using the popup list.

QuoteNerd provides for up to two tax rates to be used in a job. You can modify the default names of these taxes in the Preferences form. For instance, change the Tax1 name to SST (State Sales Tax) or NYST (New York Sales Tax) etc. In Canada, certain provinces have a separate provincial tax and a federal Goods and Services Tax (GST) so the Tax1 name might be changed to PST and the Tax2 name changed to GST.

Setup a Default Job Template

A very useful first step in using QuoteNerd is to setup a default Job template to be used in creating new Client Jobs. Managing Job templates is covered in more detail later in this guide. However, it is worthwhile to quickly setup one default Job template now. From the menu bar of the main Client Jobs form, entitled "**QuoteNerd Jobs**", select the "**GoTo Job Templates**" menu option:



The screenshot shows the main 'QuoteNerd Jobs' form. It has a title bar with 'QuoteNerd Jobs' and a dropdown arrow. Below the title bar, there are two dropdown menus: 'Sort By: Ascending' and 'Job ID'. The main area of the form is currently empty. At the bottom left, there is a 'New' button, and at the bottom right, there is a '0'.



The screenshot shows the 'QuoteNerd Jobs' main form with the 'GoTo' menu open. The menu options are: 'Start Of List', 'Middle Of List', 'End Of List', 'Items Catalog', and 'Job Templates'. The 'Job ID' dropdown is visible at the top right of the menu. At the bottom left, there is a 'New' button, and at the bottom right, there is a '0'.

This will display the **Template Jobs** List form. Naturally, there are no Job templates listed at this point. Select the **New** button to create one.

A screenshot of a web application window titled "Template 1: Edit" with a dropdown menu set to "Unfiled". The form contains the following fields: Name: TemplateJob1, Street: (empty), City: (empty), State: (empty), Zip: (empty), Country: (empty), Phone: (empty), Email: (empty), Quote #: (empty), and Invoice #: (empty). Below the fields, it says "Items: 0". At the bottom, there are four buttons: "Back", "Details..", "Add", and "GoTo...", followed by a double arrow icon.

Change the Name field to "Default Job" or a similar label that you prefer. Now, fill in fields on the form that will be common to most Jobs. These will normally be City, State and Country and possibly the Phone area code. The form should now look similar to the following:

A screenshot of a web application window titled "Template 1: Edit" with a dropdown menu set to "Unfiled". The form contains the following fields: Name: Default Job, Street: (empty), City: Mountain View, State: CA, Zip: (empty), Country: (empty), Phone: (415), Email: (empty), Quote #: (empty), and Invoice #: (empty). Below the fields, it says "Items: 0". At the bottom, there are four buttons: "Back", "Details..", "Add", and "GoTo...", followed by a double arrow icon.

Now select the Details button to enter further default information:

The minimum that should be entered here is the tax rates. In our example the Tax1 name has been changed via the preference menu to SST (Tax1). We will not be applying Tax2 to our example jobs, so it is left unchanged. Your tax names will be listed as you specified them or as Tax1 and Tax2 if you made no changes. When we are done our example looks like this:

Select done and return to Client Jobs by selecting "GoTo Client Jobs" from the menu bar.

Organization of the QuoteNerd

QuoteNerd is organized into three major sets of forms that are referred to as **views**. Each view deals with a different aspect of the QuoteNerd data. The views are:

1. Client Jobs

The Client Job forms are commonly referred to as the Job forms. These are the forms used to manage client estimates, quotes and invoices.

2. Items Catalog

The Items Catalog forms are used to manage a Catalog of line items that may be added to Jobs or Job Templates. Essentially, the Catalog items are templates to be used as line items in client jobs. The Item Catalog forms are very similar to the forms used to manage items in the Client Jobs and Job Templates.

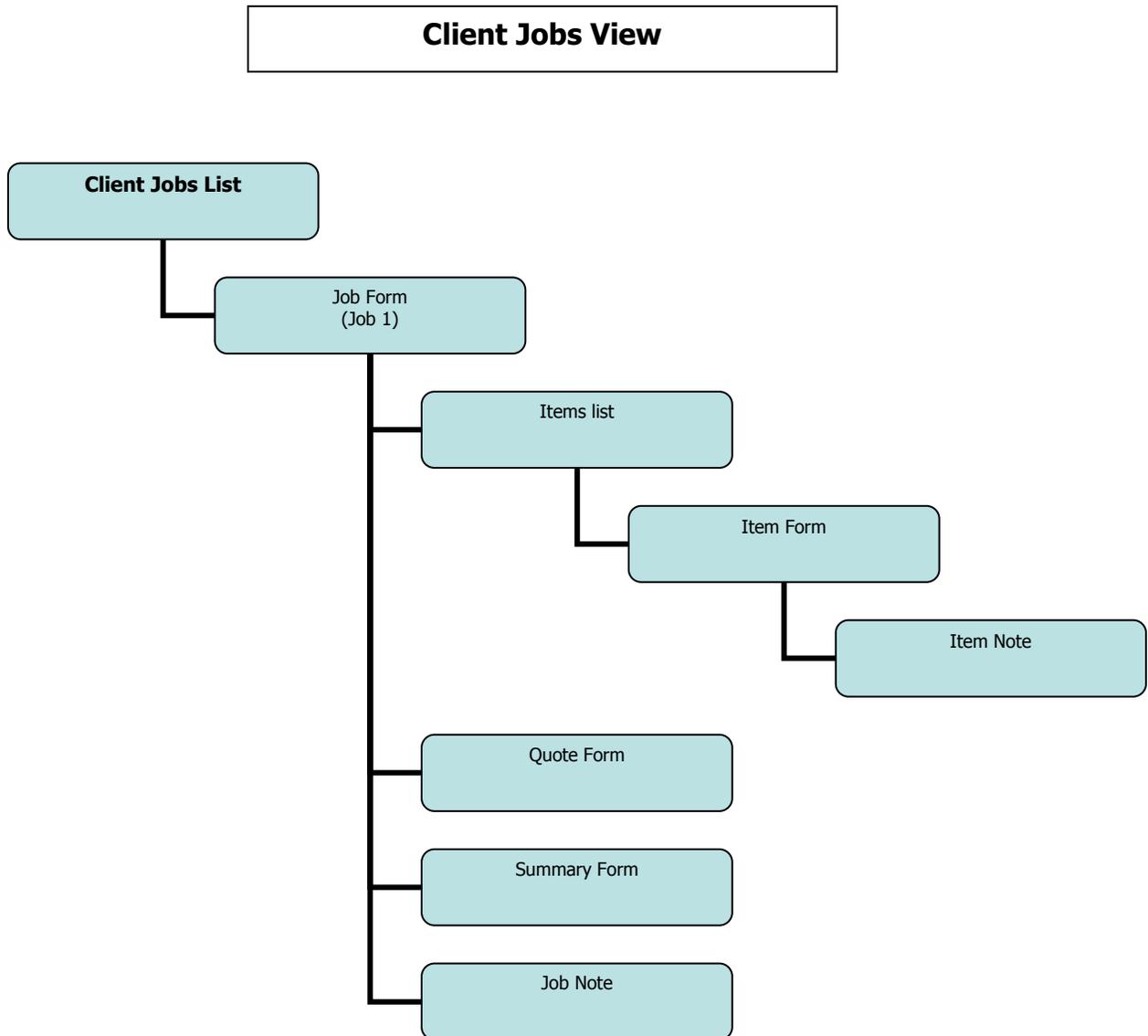
3. Job Templates

Job Template forms are used to manage a list or catalog of ready-made jobs. The job templates serve as a starting point when setting up new Client Jobs. The Job Template forms are similar to the Client Job forms.

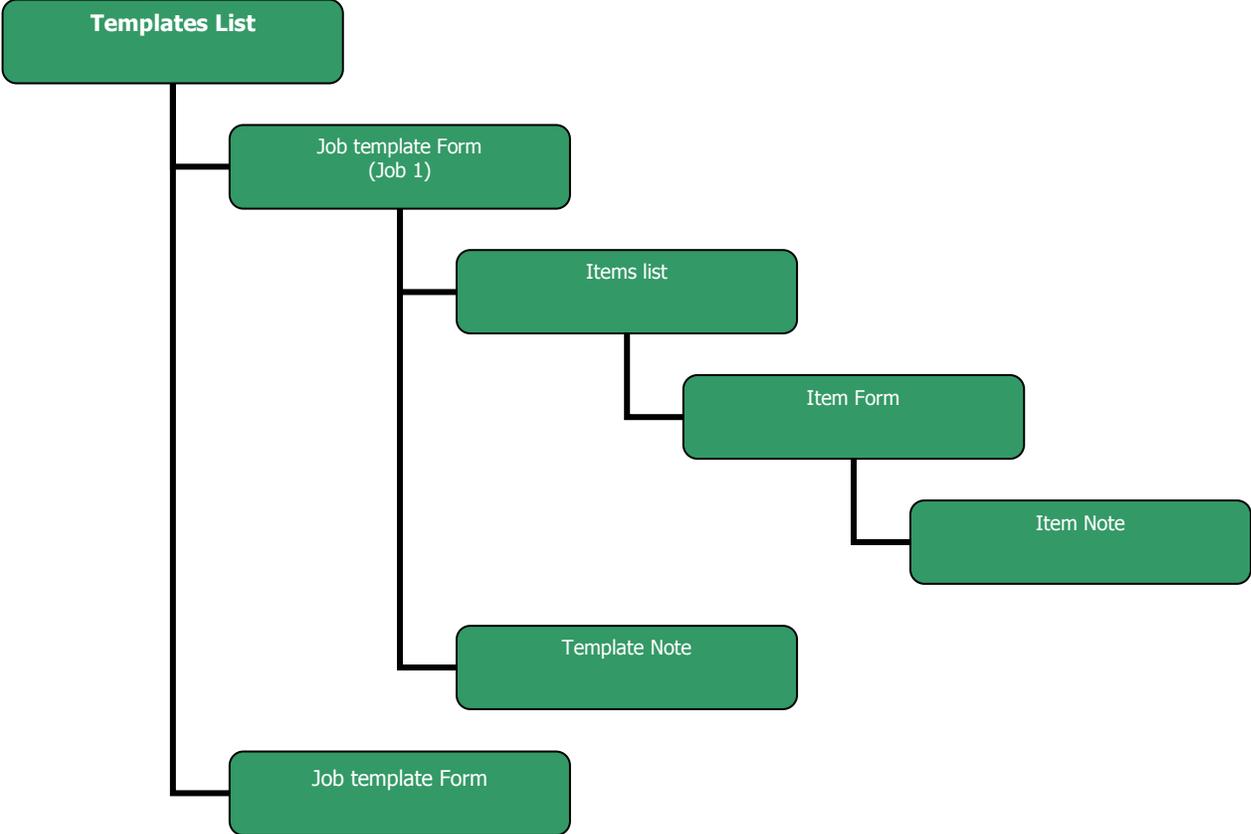
All major forms contain a **View** menu on the menu bar. The **View** menu allows you to switch from one set of forms to another and back again. QuoteNerd remembers where you were previously in a view and returns you to the form that you were last using much the same as most Palm applications – including QuoteNerd - will return you to the form you were last using when you re-open or launch the application.

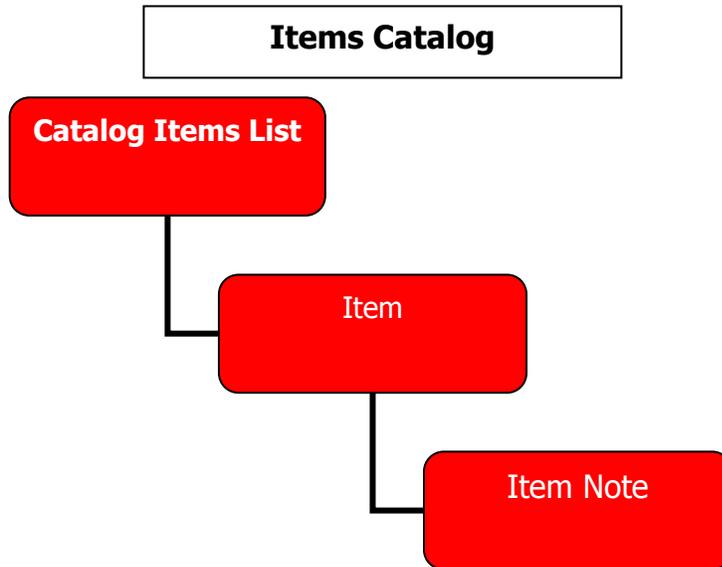
Most of the major forms in the QuoteNerd contain a **Back** and a **GoTo** button. The **Back** button will switch back to the previous form in the current form set (view). This allows you to “ping pong” back and forth between two forms in a set so that you can change information in one form and then see the affect of the change in the other form at the touch of the **Back** button. The **GoTo** button allows you to go to a **specific** form in the current view’s form set. The following briefly details the hierarchy (ordering) of the form sets.

Forms Hierarchy



Job Templates View



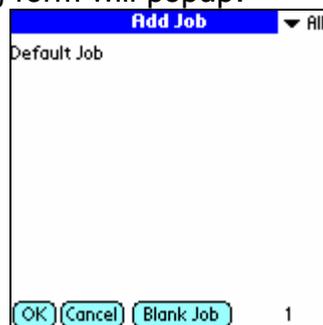


Managing Client Jobs

In this section we will briefly cover setting up a new client job.

Create a New Job

QuoteNerd does not have any jobs in its database when it is first installed on the Handheld. So, our first client job is created in the empty QuoteNerd Jobs form. Select the **New** button. The following dialog form will popup:



The **Add Job** dialog displays a list of Job templates that can be used as a starting point for the new job. If you created a default template job earlier, you will see the

default job template listed. If you select the "Default Job" from the displayed list and then select the **OK** button, the job template, including all line items associated with it, will be copied to the client jobs database. The alternative is to create a brand new job from scratch by selecting the **Blank Job** button. Select the default job template and inspect the resulting Job form.

The screenshot shows a form titled "Job 1: Edit" with a dropdown menu set to "Unfiled". The form contains the following fields:

- Name: Job1
- Street:
- City: Mountain View
- State: CA
- Zip:
- Country:
- Phone: (415)
- Email:
- Quote #:
- Invoice #:
- Status: Estimated Items: 0

At the bottom, there are four buttons: "Back", "Details..", "Add", and "GoTo..", followed by a double arrow navigation button.

The screenshot shows the "Details" section of the "Job 1: Edit" form. The fields are:

- Description: Renovations
- Discount(%): 0
- SST(%): 4.5
- Tax2(%): 0

A "Done" button is located at the bottom left of the form.

The new client job contains all of the information that we entered into the default job template excepting that the name field has been changed to a name based on the unique ID number of the job. All QuoteNerd client jobs, templates and item records are assigned unique ID numbers when created. The ID number is just a short form method of uniquely identifying a job or line item in the software. The next step after creating a new job would normally be to enter the client information and set up the Description and tax rates for the job. In this case the default tax rates that we set up in the job template are sufficient and we need only change or add information specific to the client.

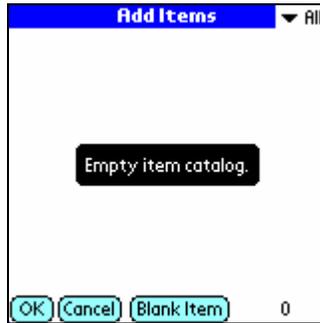
The screenshot shows the "Job 1: Edit" form with the following specific values entered:

- Name: George Smith
- Street: 55 Elk St.
- City: Mountain View
- State: CA
- Zip: 96025
- Country: USA
- Phone: (415)555-555
- Email:
- Quote #: 1002
- Invoice #:
- Status: Estimated Items: 0

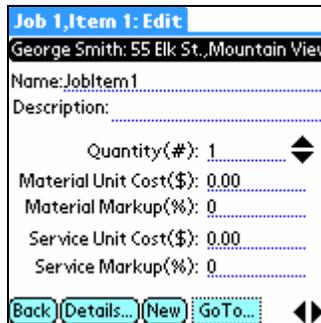
The "Details..", "Add", and "GoTo.." buttons are highlighted in blue.

Add Line Items to a Job

At this point our client job has no line items. Let's add a couple of line items to the job. Select the **Add** button on the Job form to display the **Add Items** dialog.



The **Add Items** dialog displays a list of items in the Catalog. We don't have any ready-made items in our Catalog at the moment so, we have two choices; we can create some items in the Catalog, using the GoTo menu to switch to the Items Catalog form set, and then come back to our client job and add our Catalog items or we can add a **Blank Item** to the job. For now we will just create an item from scratch. Select the **Blank Item** button.



Our first job item is as follows:

Job 1, Item 1: Edit
George Smith: 55 Elk St., Mountain View
Name: Drywall
Description: 4x8 Sheet - taped &
Quantity(#): 12.5
Material Unit Cost(\$): 6.95
Material Markup(%): 20
Service Unit Cost(\$): 32
Service Markup(%): 30
Back Details... New GoTo...

In our example we are drywalling an area of 400 Sq. Ft., using 4x8 Ft. sheets of drywall (32 Sq. Ft. each). The Item fields are described below:

1. Name

This is a short name/title for the line item. This should be a generic name to keep it short for displaying in tables on the Handheld.

2. Description

This is a detailed name or explanation of the line item. QuoteNerd will display as much of the description as will fit after the Name.

3. Quantity

This is the specified nominal quantity for the line item. In our case this value was calculated by dividing the 400 Sq.Ft. of area by 32 Sq.Ft. of coverage per sheet of drywall. You do not need to add a waste or contingency factor to this figure – QuoteNerd can do this automatically. You do not need to round this number up to a whole number in cases where partial units do not apply. QuoteNerd can do that automatically as well. See **Item Details** below for further information regarding rounding and waste factors.

4. Material Unit Cost

This is your material cost (wholesale), not necessarily the cost to your customer.

5. Material Unit Mark-up

This is your percentage mark-up (gross profit) on material. The customer's cost/charge is the sum of your material cost + your mark-up.

6. Service Unit Cost

This is your cost of labor and/or other service charges per unit of the line item. If you are paying others for labor or services, this figure is rather obvious. However, if you are self employed and do not receive a set salary from the business it is not quite as easy a figure to determine. How accurately you can determine this figure is a good indicator of how well you are managing your business. You should "know your cost per mile" as the Truckers say.

7. Service Unit Markup

This is your percentage mark-up (gross profit) on the service and labor you provide. The customer's cost/charge is your service cost + your markup.

There are some additional details that we want to specify for this type of item. These details are added in the **Item Details** dialog after selecting the **Details** button.

The Blank item's default details are almost what we want, but we need to add a waste factor of 10% and change the way taxes are applied to the item.

Job 1,Item 1: Edit
 George Smith: 55 Elk St.,Mountain View
 Name:Drywall

Details

Billable Quote Whole Units
 SST: N/A
 Tax2: Material Only
 Material Waste Factor: Both

Done

Job 1,Item 1: Edit
 George Smith: 55 Elk St.,Mountain View
 Name:Drywall

Details

Billable Quote Whole Units
 SST: Both
 Tax2: N/A
 Material Waste Factor(%): 10

Done

We now have a dry wall item (4x8 Ft. sheets). State Sales Tax (SST) will be applied to both material and service/labor, a material waste factor of 10% will be applied to the nominal quantity we specify and total quantities will be rounded up to a whole number. We will probably use this item in many jobs so it should really be added to our Item Catalog. We can quickly add the item to our Catalog via the Item menu as follows:

GoTo Item Edit Options

George S: Delete Item ✓D View
 Name:Dr: Edit Note ✓R
 Descripti: Delete Note ✓O
 AddTo Catalog

Quantity(#): 12.5
 Material Unit Cost(\$): 6.95
 Material Markup(%): 20
 Service Unit Cost(\$): 32
 Service Markup(%): 30

Back Details... New GoTo...

Job 1,Item 1: Edit
 George Smith: 55 Elk St.,Mountain View
 Name:Drywall

Add To Catalog

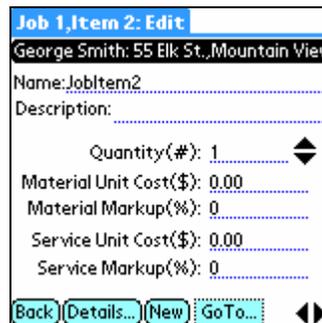
Category: Unfiled
 Catalog Item Name:
 Drywall
 Catalog Item Description:
 4x8 Sheet - taped & mudded

OK Cancel

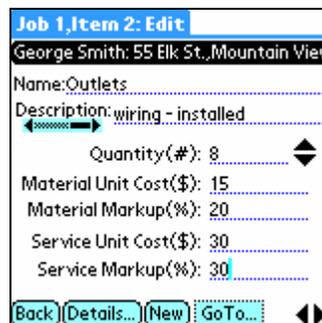
Let's add one more item to our first client job. We will be adding some electrical outlets (receptacles) in the renovation. Now that we are in the Item form, we don't have to return to the Job form to add new items. Select the **New** button.



This time we have an item in the Catalog to choose from. However, it is not the one we want so, select the **Blank Item** button to add another job item from scratch.



Once again, we quickly modify the new item to meet our needs.



Now that we have some line items added to our job, we can scroll through the items using the left and right scroll arrows at the bottom right of the Item form. Try it, and then add the Outlets item to the **Item Catalog**.

Selecting the **Back** button will return to the previous form which was the Job form. Note that the **Back** button will not toggle between the Item forms or any two forms of the same type. That is what the scroll arrows are for in the bottom right of the **Item** and **Job** forms. Select the **Back** button.

Note that the form now shows two items associated with the job in the lower right of the form. Selecting the **Back** button on this form will return us to the Item form, allowing us to ping pong between the two forms. To invoke a form other than these two forms – Job and Item forms – select the **GoTo** button.

All of the forms shown in the **GoTo** list are associated with the job we are working on except for the Jobs List form. Selecting the Jobs List form will return us to the main **QuoteNerd Jobs** form. Let's briefly take a look at the other forms associated with the job.

The **Job Note** form is fairly self explanatory. A small memo of up to 4000 characters can be added to each job:

The **Items List** lists the items associated with the current job:

Job 1: Items List

George Smith: 55 Elk St., Mountain View

Drywall, 4x8 Sheet - taped & mud.. 8

Outlets, 110V duplex receptacle.. 8

Item List Options

Show Matl Quantity

Show Billable Status

OK Cancel

Job 1: Items List

George Smith: 55 Elk St., Mountain View

Drywall, 4x8 Sheet - taped & mu.. 14

Outlets, 110V duplex receptacle.. 8

Back New Show... Go To... 2

The **Summary** form is the QuoteNerd owner's view of the Job. The Summary has a number of options for displaying the owner's cost, profit and customer charges associated with the Job. The Summary is formatted as a scrollable display of the line item information as shown below:

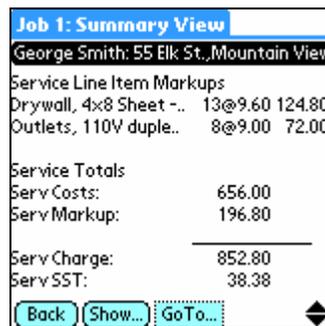
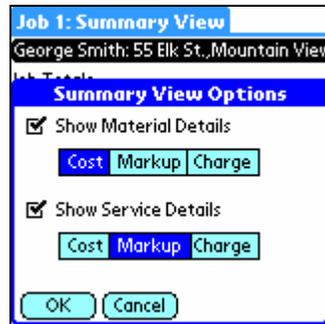
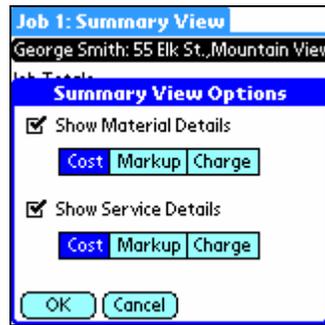
Job 1: Summary View	
George Smith: 55 Elk St., Mountain View	
Material Line Item Costs	
Drywall, 4x8 Sheet..	14@6.95 97.30
Outlets, 110V duple..	8@15.00 120.00
Material Totals	
Matl Cost:	217.30
Matl Markup:	43.46
Matl Charge:	260.76
Matl SST:	11.73
<input type="button" value="Back"/> <input type="button" value="Show..."/> <input type="button" value="GoTo..."/>	

Job 1: Summary View	
George Smith: 55 Elk St., Mountain View	
Material Totals	
Matl Cost:	217.30
Matl Markup:	43.46
Matl Charge:	260.76
Matl SST:	11.73
Matl Total:	\$272.49
Matl Gross=\$43.46, GM=16.7%	
<input type="button" value="Back"/> <input type="button" value="Show..."/> <input type="button" value="GoTo..."/>	

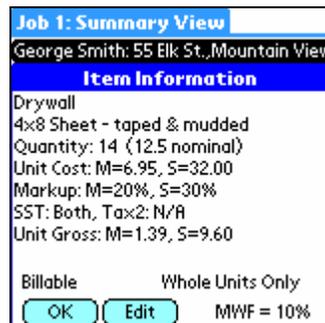
Job 1: Summary View	
George Smith: 55 Elk St., Mountain View	
Service Totals	
Serv Costs:	656.00
Serv Markup:	196.80
Serv Charge:	852.80
Serv SST:	38.38
Serv Total:	\$891.18
Serv Gross=\$196.80, GM=23.1%	
<input type="button" value="Back"/> <input type="button" value="Show..."/> <input type="button" value="GoTo..."/>	

Job 1: Summary View	
George Smith: 55 Elk St., Mountain View	
Job Totals	
Job Costs:	873.30
Job Markup:	240.26
Job Charges:	1113.56
Job SST:	50.11
Job Total:	\$1163.67
Job Gross=\$240.26, GM=21.6%	
<input type="button" value="Back"/> <input type="button" value="Show..."/> <input type="button" value="GoTo..."/>	

The Summary information can be shown in a number of different ways:



Double clicking on a material or service line item will invoke the **Summary Item Information** dialog which shows more detailed summary information for the item and allows the item to be edited as well.



Note that the total quantity for our drywall item is now 14 sheets after adding a Material Waste Factor (MWF) of 10% and specifying that the item be quoted in whole units. Also, note that the service charges are based on the item quantity prior to adding the waste factor.

The **Quote** form is the customer view of the job. All material and service charges include mark-ups. There are still a number of different ways in which the quote/invoice information can be shown. A couple of views of the Summary and Quote forms are shown side by side for comparison:

Job 1: Quote View	Job 1: Summary View
George Smith: 55 Elk St.,Mountain View Material Line Item Charges Drywall, 4x8 Sheet.. 14@8.34 116.76 Outlets, 110V duple.. 8@18.00 144.00 Materials Totals Matl Charges: 260.76 Matl SST: 11.73 Matl Total: \$272.49	George Smith: 55 Elk St.,Mountain View Material Line Item Costs Drywall, 4x8 Sheet.. 14@6.95 97.30 Outlets, 110V duple.. 8@15.00 120.00 Material Totals Matl Cost: 217.30 Matl Markup: 43.46 Matl Charge: 260.76 Matl SST: 11.73
Back Show... Print GoTo...	Back Show... GoTo...
Job 1: Quote View	Job 1: Summary View
George Smith: 55 Elk St.,Mountain View Service Line Item Charges Drywall, 4x8 Sheet.. 13@41.60 540.80 Outlets, 110V duple.. 8@39.00 312.00 Service Totals Serv Charges: 852.80 Serv SST: 38.38 Serv Total: \$891.18	George Smith: 55 Elk St.,Mountain View Material Totals Matl Cost: 217.30 Matl Markup: 43.46 Matl Charge: 260.76 Matl SST: 11.73 Matl Total: \$272.49 Matl Gross=\$43.46, GM=16.7%
Back Show... Print GoTo...	Back Show... GoTo...

The Quote form allows the pricing information to be shown and printed in a number of ways via the **Show** button.

Job 1: Quote View	Job 1: Quote View
George Smith: 55 Elk St.,Mountain View Quote View Options <input type="checkbox"/> Show Combined Matl & Serv. <input type="checkbox"/> Summarize Matl & Service <input checked="" type="checkbox"/> Itemize Matl & Service <input type="checkbox"/> Only Itemize Materials <input type="checkbox"/> Only Itemize Service <input checked="" type="checkbox"/> Only Show Billable Items OK Cancel	George Smith: 55 Elk St.,Mountain View Quote View Options <input checked="" type="checkbox"/> Show Combined Matl & Serv. <input type="checkbox"/> Summarize Matl & Service <input checked="" type="checkbox"/> Itemize Matl & Service <input type="checkbox"/> Only Itemize Materials <input type="checkbox"/> Only Itemize Service <input checked="" type="checkbox"/> Only Show Billable Items OK Cancel

Material and service charges can be blended into a combined charge instead of reporting them separately.

Job 1: Quote View
 George Smith: 55 Elk St., Mountain View
 Job Line Item Charges
 Drywall, 4x8 Sheet.. 14@46.97 657.56
 Outlets, 110V duple.. 8@57.00 456.00
 Job Totals
 Job Charges: 1113.56
 Job SST: 50.11
 Job Total: \$1163.67
 [Back] [Show...] [Print] [GoTo...]

Further options are provided for formatting a printed quote or invoice via the Quote Options Menu:

GoTo Options
 George S... View
 Job Line I...
 Drywall, ... 57.56
 Outlets, ... 56.00
 Job Totals
 Job Charges: 1113.56
 Job SST: 50.11
 Job Total: \$1163.67
 [Back] [Show...] [Print] [GoTo...]

Quote Options Menu:
 About QuoteNerd
 Registration
 Company Info
 Preference
 Printing

Job 1: Quote View
Print Options
 Copies: 1 Extra Top Margin: 0
 Include: Signature Line
 Footer Payment Options
 Service Label:
 Service
 Footer Text:
 [OK] [Cancel]

Job 1: Quote View
Print Options
 Copies: 1 Extra Top Margin: 0
 Include: Signature Line
 Footer Payment Options
 Service Label:
 Labor
 Footer Text:
 Thank You for your Business!
 [OK] [Cancel]

The Extra Top Margin option is for adding additional margin lines at the top of each page to support a company Letterhead or logo.

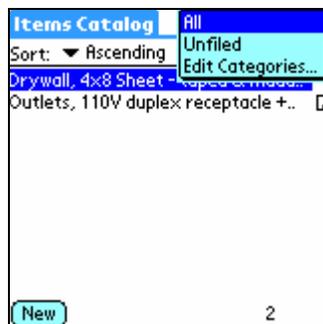
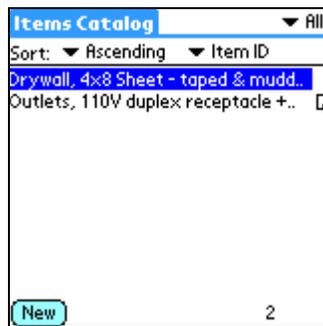
The Service Label is the text label to be printed for service items. The term "Labor" or "Installation" may be a more appropriate label for service charges in many business quotes and invoices. Changes made to the **Printing** options only affect the printed output unlike the **Show** button options which affect both the display and the printed output.

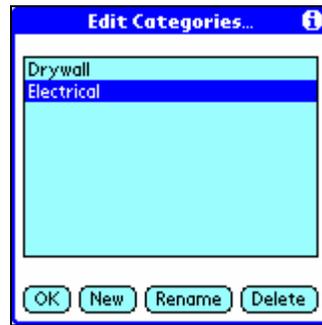
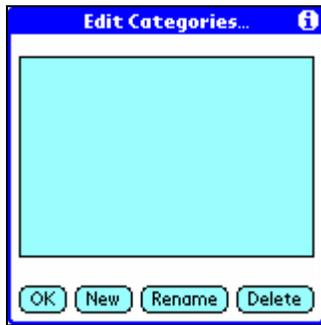
Managing the Items Catalog

Managing the Items Catalog is very easy. There are two main forms in the Items Catalog form set; the Items list form and the Catalog Item form. The Catalog item form is essentially the same as the item form in the Client Jobs (and the Job Templates). New Blank items can be added to the Catalog from the Catalog Items list, from the Catalog Item form or preconfigured items can be added to the Catalog from an existing Client job or even a Job Template. The Items Catalog supports filing of items in as many as 15 user defined categories. In addition, a note of up to 4000 characters in length can be attached to each item in the Catalog.

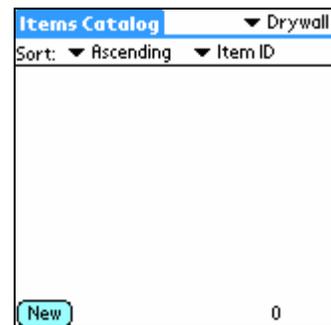
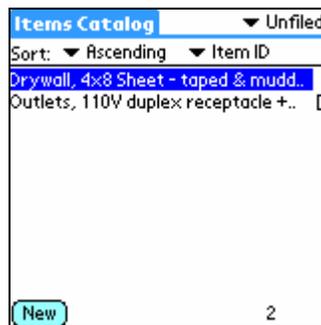
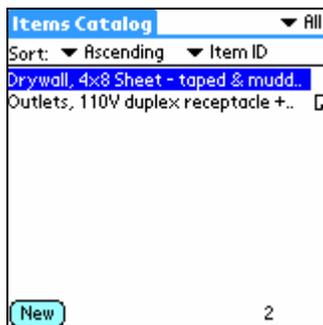
Creating Item Categories

Creating Item categories is the same as creating categories in any of the standard Palm applications. Select the category popup in the upper right corner of the Items Catalog form. Select Edit Categories and then new to create a new category. We will create two categories for the types of items we have added to the Catalog thus far.





Since we did not assign our items to a category when we added them to the Catalog (we didn't have any categories defined) both of our sample items are in the default "Unfiled" category. These items will only be displayed in the list of Catalog items if we have selected All categories or the Unfiled category in the Items Catalog form.



Note that QuoteNerd displays the number of items in the category being displayed, in the lower right of the form.

Assigning Items to a Category

To assign an existing item to a category, select the item from the list. Select our drywall item first.

The left screenshot shows the 'Items Catalog' form with a dropdown menu set to 'All'. The 'Drywall, 4x8 Sheet - taped & mudd...' item is selected. The right screenshot shows the 'Catalog Item 1: Edit' form with the category dropdown set to 'Unfiled'. The item details are visible, including Name, Description, Quantity, and various costs and markups.

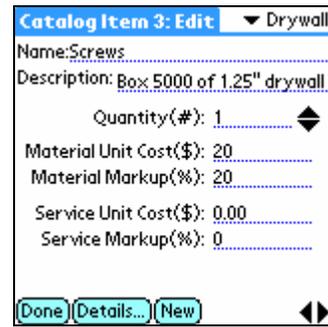
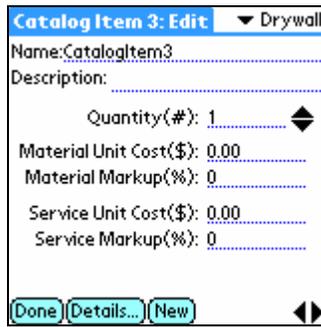
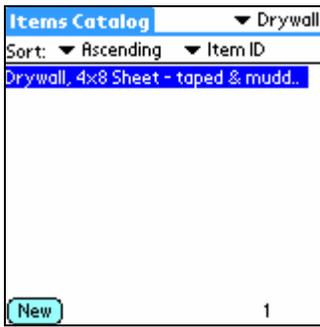
Change the category of the Drywall item to Drywall and then select the Done button to return to the Items Catalog form.

The left screenshot shows the 'Catalog Item 1: Edit' form with a dropdown menu showing 'Drywall', 'Electrical', and 'Unfiled'. The 'Drywall' option is selected. The right screenshot shows the 'Catalog Item 1: Edit' form with the category dropdown set to 'Drywall'. The item details are visible.

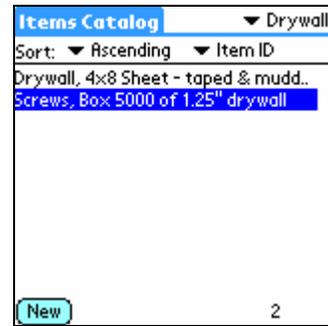
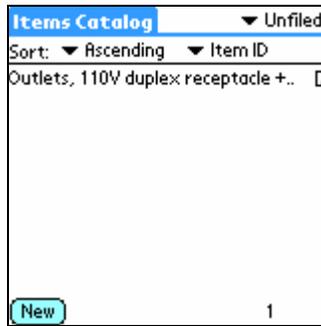
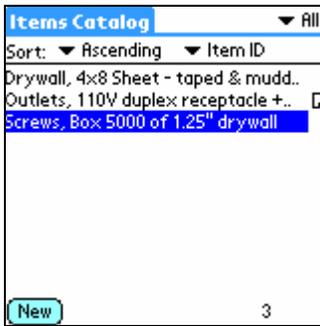
Now when we review the Items Catalog by category we see the following:

The first screenshot shows the 'All' category with two items. The second screenshot shows the 'Unfiled' category with one item. The third screenshot shows the 'Drywall' category with one item.

If a new item is created from the Items Catalog form, the item will be assigned to the category currently being displayed in the list or to the Unfiled category if All item categories are being displayed. If a new item is created from the Catalog Item form, it will be assigned to the category of the current item. **This works exactly the same for categorizing Jobs in the Client Jobs and Job Templates form sets.** We'll create one new item to demonstrate this. Select our Drywall item from the Items Catalog list. Then select the New button in the Item form and configure the new Item.



When we review our Item Catalog, we now see the following:



That is really all there is to managing the Items Catalog.

Managing Job Templates

Managing Job Templates is similar to managing the Items Catalog and the Client Jobs. Templates are preconfigured Jobs including optional line items. The Templates can be organized in user defined categories and the template form set is similar to the Client Job form set. A note can be attached to each template job and to individual items in a Job Template.

Since we have covered Client Jobs and the Items Catalog and created a simple Job Template above, we will not go through a step by step example of creating another Job Template. Refer to the sections on Client Jobs and the Items Catalog if you have any problems managing the Job Templates.

Tips & Shortcuts

- Use the Up/Down scroll arrows (bottom right of form) to scroll lists one line at a time. Use the Up/Down hardware buttons or jog control to scroll a list one page at a time.
- Select the number of items in a Job form to display the job's item list. The item list can also be displayed using the Job form's **GoTo** button.
- Clicking twice (selecting twice with the stylus) on a line item in a Client Job Summary or Quote form will display an **Item Information** dialog giving more detailed information on the line item. The item can be edited from the Item Information dialog if displayed while in the Summary form but not if displayed from the Quote form (we don't want to accidentally show our private information to the customer...).
- When cycling through jobs in a **Job** form, you only see jobs that match the current job list display category. This is true even if you change the category of the current job in the **Job** form.
- Changing the status of a job will lock the job data. The lock state can be overridden via the Job menu item in the **Job** form. A locked state is indicated in the title bar.
- Select the right most column in a job or item list to add, edit or review an attached note.
- When adding an item to a job, you can select a Catalog item's note icon to view the note associated with it prior to adding it to the job.
- Multiple items can be added, at the same time, from the Items Catalog to a Client Job or a Job Template. Select each item you wish to add to the job, with the stylus, and then select the **OK** button.
- Items can be selected from multiple Catalog categories in the Add Items dialog. Review all items selected in all categories by changing the display category to All. Selected items will be highlighted.
- When creating a new job, you can view a note attached to a Job Template in the list by selecting the note icon in the rightmost column.