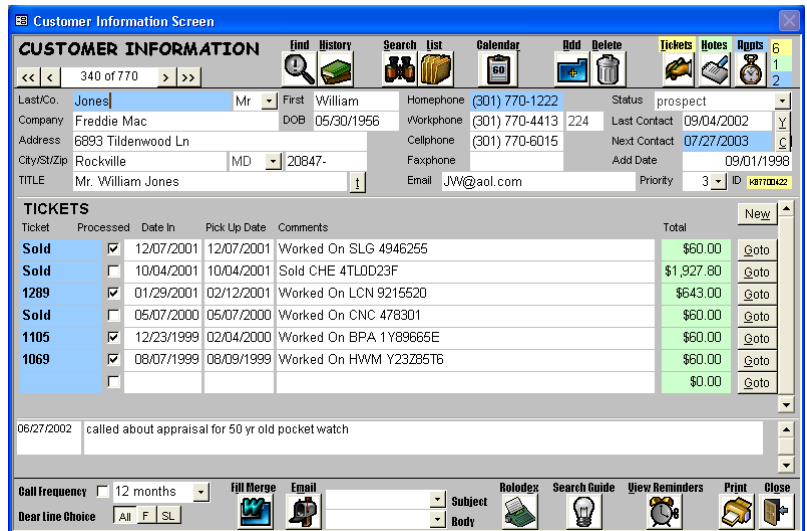


# RETAIL Sage Manual (Retail Point of Sale and Customer Management System) Version 1.2

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## Introduction:

The RETAIL Sage is the easiest to use, most feature rich retail point of sale and customer management and appointment system available. It is a simplified system designed to save time and increase productivity for retail sales and repair business users with any level of computer skills or experience. The RETAIL Sage is based on our powerful contact management system, the CONTACT Sage; providing you with a myriad of customer specific functions. The RETAIL Sage interfaces with Microsoft Office and is written in Microsoft Access. This means that once your computer has Microsoft Access installed on it (we even include a version of Microsoft Access with the RETAIL Sage), no other software installation is necessary. Because of its design, the RETAIL Sage is also compact and self-contained. The entire RETAIL Sage system fits onto one floppy disk. (This requires a compression program such as PKZip or WinZip.) Even with thousands of customers and their sales tickets, appointments, and notes, the entire RETAIL Sage system still fits onto a single disk. This feature allows you to transport the system with all of its data among multiple computers through disks or even email.

To ensure that our product will meet your needs, the RETAIL Sage design team included small retail and repair business owners and users, and top notch programmers and designers. (All of our programmers hold masters degrees in software engineering or computer science.) In addition, the RETAIL Sage was written following the highest Software Engineering Institute Standards. The RETAIL Sage will never become obsolete because Microsoft Access is backward compatible with previous versions, meaning the system will be compatible with all future versions of Microsoft Access and Microsoft Office.

Features: ("system" refers to the RETAIL Sage)

### **Customer features:**

- store customer information including name, address, home/work phone numbers, email address
- store notes for each customer (with option to display notes on customer information screen)
- set up and monitor appointments with or without customer association
- track customer communication through last date contacted and next contact date fields
- automatically track customers through the purchase process
- find customers by searching any combination of data for one field on the customer information screen
- find customers through any combination of information stored in the system on the Find Customer screen
- find customers through a keyword search of Notes and Tickets
- simultaneously track customer activities and perform new search
- automatically fill in e-mail addresses/subjects/bodies for a customer or customer groups in the default windows e-mail program (Microsoft Outlook/Outlook Express/etc.)
- automatically fill customer information into Microsoft Word mail merge documents
- automatically create customer notes when creating emails and form letters
- monthly calendar interface for setting up and reviewing appointments
- printout daily appointment schedule
- user selectable report generator lets you create customer information reports with/without notes, appointments, or tickets that are output to Microsoft Notepad, Word, or Excel (you can select which customer information is output and also the order that the information is arranged in for all reports)
- dial any telephone number on the screen (requires a modem)
- see appointments as they come due in pop-up windows

### **Retail features:**

- store customer ticket information including dates, parts, labor, payment method and comments
- store unlimited parts and labor for each ticket
- select parts and labor from inventory or by category/manufacturer/model
- find customers by searching any combination of ticket data
- user selectable sales report generator lets you create sales based reports for any period of time including customer, ticket, parts, and labor information (you can select which customer information is output and also the order that the information is arranged in for all reports) (outputs to Microsoft Notepad, Word, or Excel)
- store parts inventory information including category, manufacturer, model, description, wholesale/retail cost, shipping fees and dates part was sellable
- store labor services information including category, subcategory, description, wholesale/retail cost
- track employee hours with an employee timesheet entry and report system

### **System features:**

- password protect the system with general passwords (different passwords to control employee access to system functions), or employee specific passwords

- backup entire database to one 1.44 MB floppy disk (requires optional WinZip 8.0 or later Compression Program)
- automatically backup database daily/weekly
- run utilities that include full database cleanup and management
- optional Palm and Pocket PC Synchronization

To facilitate ease-of-use, the RETAIL Sage does not have a traditional Windows menu system and can be used without a mouse. The normal horizontal menu at the top of the screen has been replaced by an on-screen function limited menu system. You can only access system functions that are on the screen, meaning that you will never again have to waste time looking for functions in multiple menus.

**RETAIL Sage fee schedule:**

The retail cost for the RETAIL Sage is \$395. The RETAIL Sage comes with support for the first 45 days with a maximum of 10 support calls and 1 year of new version upgrades. Support beyond the first 45 days will cost \$200 per year. By staying current with the annual cost of running the RETAIL Sage, you will receive all future updates and enhancements of the RETAIL Sage free of charge, including free support.

Most retail system data can be loaded into the RETAIL Sage. Because retail system data varies in form depending on the retail system, B & I Computer Consultants will transfer retail system data into the RETAIL Sage, for a nominal fee.

If a registered user finds an error or mistake in the RETAIL Sage that affects the functionality of the program, that error will be fixed free of charge. Also any changes made to the RETAIL Sage by B & I Computer Consultants will be guaranteed to be defect free for a period of 45 days from program change delivery.

**Hardware requirements:**

The RETAIL Sage works through and requires Microsoft Access 2000 or later. The system itself is distributed on a CD-ROM that includes the RETAIL Sage program, mail merge table, sample word letter, RETAIL Sage manual, and a run only version of Microsoft Access 2000 and 2002/XP in the event that you do not already have Microsoft Access 2000 or newer.

The minimum system requirements are:

- a) 75 MHz Pentium class machine
- b) 16 MB of RAM
- c) Windows 95

The recommended system requirements are:

- a) 200 MHz Pentium class machine or higher
- b) 32 MB of RAM or higher
- c) Windows 95 or higher, Microsoft Access 2000 or higher

# RETAIL Sage Screen Manual (Retail Point of Sale and Customer Management System)

## Controls:

A mouse is not needed to use the RETAIL Sage.

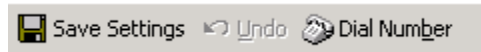
Tab: move in between fields and buttons

F6: switch panes (panes are sections of the screen separated by horizontal black lines)

Alt + letter under button: click that button

Alt + down arrow: see combo box choices

## Common Functions:



All RETAIL Sage screens have a common menu at the top of the application window. The button functions are:

Save Settings: Saves resized screens

Undo: Undoes last data change

Dial Phone: Dials highlighted telephone number (requires a modem)

RETAIL Sage start screen:

Figure 1:



This is the first screen in the RETAIL Sage system. This is also the only screen from which you can properly close the RETAIL Sage.

Quit: closes the RETAIL Sage

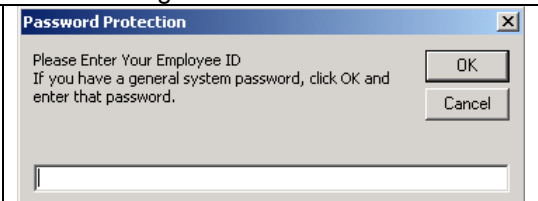
Start: has two functions:

- recognize the user, ask for a user password, and assign appropriate permissions, or if the user is not recognized ask for the user and their password, or a general system password (discussed in password entry screen below)
- open the main menu

Figure 2:



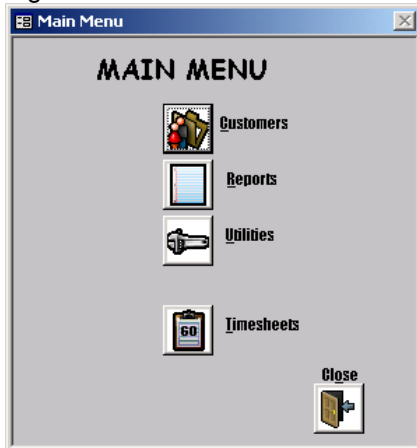
Figure 3:



The administrator (or any user who has system permission) has the option of password protecting the RETAIL Sage. (discussed below in the utility section)

If the administrator password protects the RETAIL Sage, the system will automatically determine who is logged on to the PC from which the system is run. If that user has been entered into the system (discussed below in the utility section), the user's permissions are automatically loaded. If the user is not recognized by the system, the password protection entry screen comes up. If the user types in an invalid username and/or password, the system will ask the user if they would like to try again. The user has 3 chances to enter a valid password. After each invalid password entry, the user is given the option to quit the RETAIL Sage.

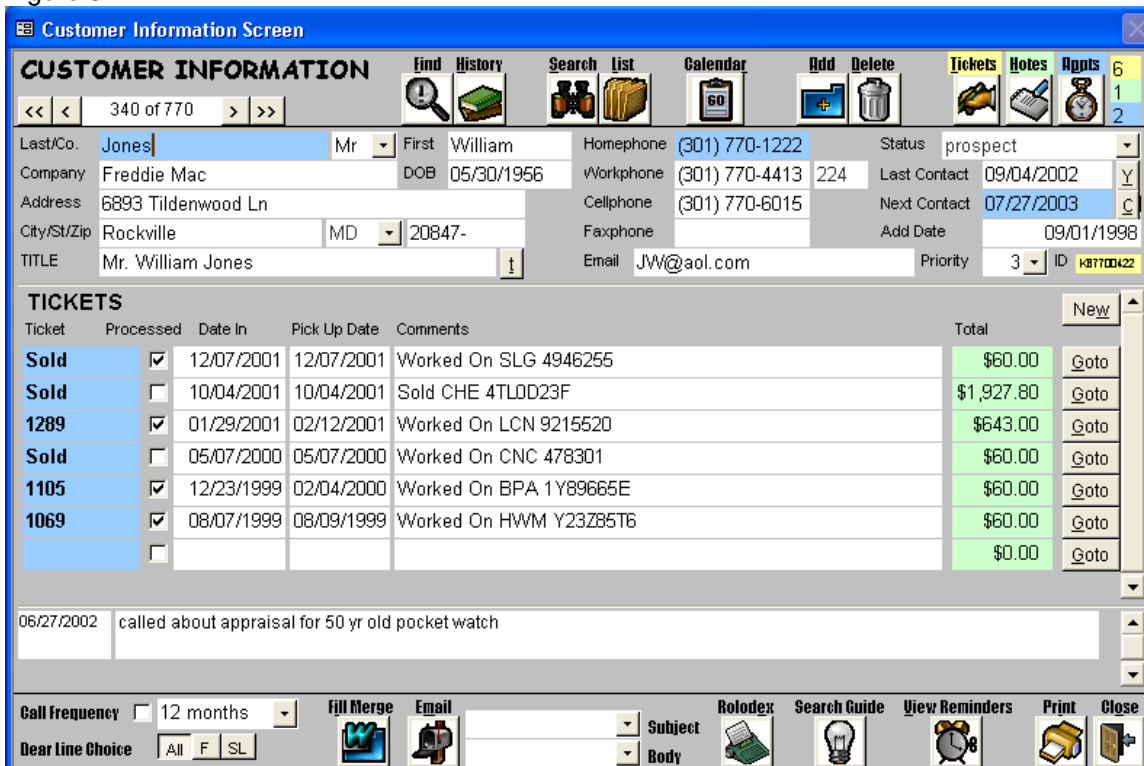
Main Menu screen:  
Figure 4:



From this screen, you can choose to look at Customer data, enter the report menu, or enter the system utilities menu. The system utilities menu will only display options that you have permission to choose. (see password protection above)

- Customers: opens the Customer data screen
- Reports: opens the report menu
- Utilities: opens the utilities menu
- Timesheets: opens the timesheets screen
- Close: goes back to the start screen

Customer Information screen:  
Figure 5:



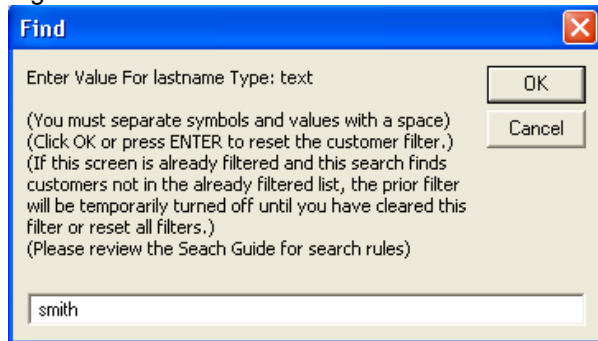
This screen shows customer information, summaries of purchases that the customer has made, and notes for the current customer. From this screen, you can open the search and calendar screens, review appointments, create form letters for the current customer, and send e-mail to the current customer.

There are command buttons at the top and bottom of the screen:

- << brings up the alphabetically first customer in the list
- < brings up the previous customer in the list
- > brings up the next customer in the list
- >> brings up the last customer in the list

Find: opens the find box (below)

Figure 6:



Please refer to the search guide for search rules.



If a search is performed and customers are filtered, a blue F for filtered appears next to the customer selectors.

Please refer to the search guide for search rules.

History: opens the Find History screen that keeps a list of all previous Find box searches

List: opens the customer list screen filtered by criteria in the find customer screen, or lists all of the customers in the system

Add: prepares the screen to add a new customer

Delete: removes the current customer as well as all related customer information from the system. It is very important that you understand that the delete button not only removes the customer's information from the system, but also removes all of the customer's tickets, appointments, and notes for the current customer from the system

Calendar: opens the calendar screen (discussed below)

Search: opens the search screen (discussed below)

Notes: opens the notes screen for the current customer (the color matched box to the right of the notes button counts how many current customer notes are stored in the system)

Appts: opens the Appointments screen and displays the appointments for the current customer in reverse chronological order (the color matched box to the right of the appts button counts how many future appointments are set for the current customer)

Call Frequency: how often a customer should be called (depending on the setup screen options, call frequency can be used to automatically set up appointments)



Mail Merge Dear Line - All (Sal+Customer/Title), F (Customer First Name only), SL (Salutation + Customer Last name)

Fill Merge: fills a table with the name/address on the customer screen. (Microsoft Word accesses the filled table for the mail merge feature. This feature is explained in the Customer List section.)

E-mail: opens the default e-mail program and prefills the e-mail address for the current customer and the subject and body selected from the 2 list boxes to the right of Email.

Rolodex: displays the lastname rolodex in the notes area. Picking a letter filters the customers by lastname.

You can use the cycling buttons at the top left of the screen to advance through the filtered customer list. The All button removes the last name filter.

View Reminder: at the bottom right of the screen opens the appointment reminder screen if there are current appointments in the reminder queue.

Print: opens a print preview for the current selected ticket.

Close: goes back to the main menu.

The data areas on the customers information screen are mostly self-explanatory. The following is an explanation of the more ambiguous data areas.

Customer ID: system generated ID consisting of customer name and telephone number

Sal: Salutation

If the RETAIL Sage is used with a keyboard, you can move between the Customer and Ticket areas by clicking the B and Z buttons, and the top menu area by clicking Q.

The area of the screen below tickets displays notes which are checked to appear on the customer information screen.

Ticket area:

Figure 7:

TICKETS							New
Ticket	Processed	Date In	Pick Up Date	Comments	Total		
<b>Sold</b>	<input checked="" type="checkbox"/>	12/07/2001	12/07/2001	Worked On SLG 4946255	\$60.00		Goto
<b>Sold</b>	<input type="checkbox"/>	10/04/2001	10/04/2001	Sold CHE 4TL0D23F	\$1,927.80		Goto
<b>1289</b>	<input checked="" type="checkbox"/>	01/29/2001	02/12/2001	Worked On LCN 9215520	\$643.00		Goto
<b>Sold</b>	<input type="checkbox"/>	05/07/2000	05/07/2000	Worked On CNC 478301	\$60.00		Goto
<b>1105</b>	<input checked="" type="checkbox"/>	12/23/1999	02/04/2000	Worked On BPA 1Y89665E	\$60.00		Goto
<b>1069</b>	<input checked="" type="checkbox"/>	08/07/1999	08/09/1999	Worked On HWM Y23Z85T6	\$60.00		Goto
	<input type="checkbox"/>				\$0.00		Goto

New: opens the ticket screen and readies it for new ticket entry.

Goto: opens the ticket screen for the current ticket.

Ticket Screen:

Figure 8:

Ticket: **1289** | Date In: 01/29/2001 | Date Out: 02/12/2001

Comment: Worked On LCN 9215520

### TICKET DATA

Salesperson: bill

Delete Print Close

**PARTS/PRODUCTS**

Category	Manufacturer	Model	Comment	Quantity	Cost
Wall Clock Quartz	Seiko	00254	cherry finish with gold face	1	\$541.00
				1	\$0.00

**ITEMS TO REPAIR**

Category	Manufacturer	Model	Comment
Grandfather Clock	Loricron	9215520	steel finish modern style with white dial

**LABOR**

Category	Subcategory	Comment	Labor Person	Hours	Cost
Services	Oil Clock	precision clock oil	mark	0	\$75.00
				0	\$0.00

Card:

Card #:

Exp Date:

Charge Payment:

Bank: Chase

Account: 7761

Check #: 2286

Cash: \$0.00

Charge: \$0.00

Check: \$643.00

Total Parts: \$541.00

Total Labor: \$75.00

Tax: \$27.05

**Total: \$643.05**

**Balance: \$0.05**

Process: updates the inventory data to reflect the current ticket sale

Delete: deletes the current ticket and all parts and labor for that ticket

Select Inventory: opens the item inventory screen for item selection

Select Labor: opens the labor type inventory screen for labor selection

Print: prints the current ticket

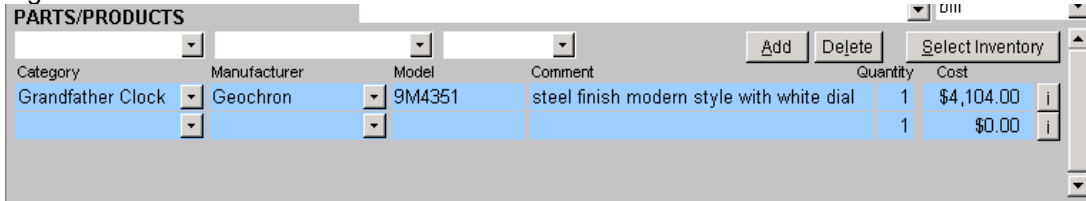
Close: goes back to the customer information screen



Controls which screen areas to display. Products displays Parts only. Labor displays Items to Repair and Labor only. When the ticket screen is opened, the system checks the parts and labor on the current ticket and sets up the screen accordingly. You can change the screen display at any point.

**Parts Area:**

Figure 9:

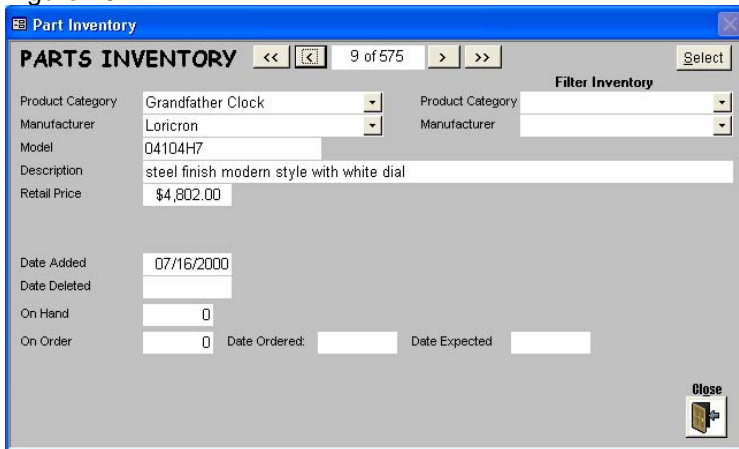


Top list boxes (left to right): Part Category, Manufacturer, Model: As each list box selected, the other list boxes (left to right) are filtered to reflect the list box selections.

- Add: adds the model selected in the top list boxes to the ticket
- Delete: removes the current part and updates the balance figures
- Select Inventory: opens the item inventory screen for item selection
- i: displays the current part on the item inventory screen

**Selecting Part from Inventory**

Figure 10:



Select: Selects the current part for adding to ticket

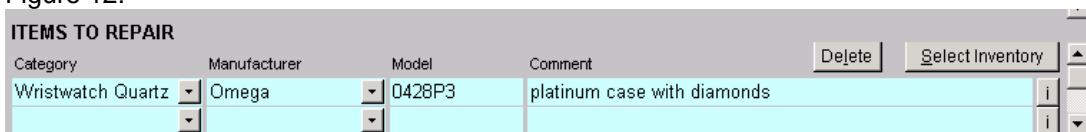
Figure 11:



Add Selection: adds part selected from item inventory to ticket

**Labor Area:**

Figure 12:





The items to repair area is identical to the parts area except that there are no quantity or cost boxes. The items to repair section is to track the items that are brought in for repair. The system distinguishes between items to repair and parts by cost. (Cost=0 Item to Repair; Cost > 0 Part)

Figure 13:

Category	Subcategory	Comment	Labor Person	Hours	Cost
Services	Change Watch Batt			0	\$6.00
				0	\$0.00

Top list boxes (left to right): Labor Category, Labor Subcategory: As each list box selected, the other list boxes (left to right) are filtered to reflect the list box selections.

Add: adds the labor type selected in the top list boxes to the ticket

Delete: removes the current labor type and updates the balance figures

Select Labor: opens the labor type inventory screen for labor selection

I: displays the current labor type on the labor type inventory screen

### Selecting Labor from Labor Types

Figure 14:

**LABOR INVENTORY** 8 of 8

Labor Category: Services  
 Labor Subcategory: Estimate  
 Description: inspect broken item- estimate is guaranteed to be within 25% of repair price  
 Labor Hours: 0  
 Retail Price: \$30.00

Select: Selects the current labor for adding to ticket

Figure 15:

Add Labor: adds labor type selected from labor type inventory to ticket

### Notes screen:

Figure 16:

John Andrews

**NOTES**

- 07/16/2002 will bring in parents of clock this Friday for repair
- 07/11/2000 called about appraisal for 50 yr old pocket watch

Add: prepares the screen to enter in new notes (prefills the date field)

Delete: deletes the current note

Show: displays the current note on the Customer information screen

Print: prints the current ticket.

Close: goes back to the customer screen.

Find Customer screen:  
Figure 17:

You have the option of searching for customers in the system via a combination of any of the white boxes on the find customer screen. For example, you can look for customers in the state of Maryland with a last name Smith who have bought more than \$2,000 from the store. The system will search the database for customers matching the description. If only one customer is found, the customer information screen displays that customer. If more than one customer matches the criteria selected, the customer list (discussed below) screen will come up and you will have the option of choosing which customer's information you want to see. Data can only be entered on the find customer screen in the white boxes. The find customers screen is an exact copy of the customer information screen. This is done to provide familiarity with the information layout.

**Please refer to the search guide for search rules.**

There are four command buttons on the screen.

List: displays the complete customer list on the customer list screen.

Search: creates a filter based on the criteria entered and applies that filter to the database. If only one customer is found, the customer information screen displays that customer. If more than one customer is found, the customer list screen displays a list of all of the customers found that match the criteria selected.

Reset: clears all entries on the screen.

Close: goes back to the customer information screen for the current customer.

Customer List screen:  
Figure 18:

Accessed	Name	Last Contact	Next Contact	View Filtered Customers
<input checked="" type="checkbox"/>	J Barrett	08/07/2002	03/26/2003	<a href="#">Goto Customer</a>
<input checked="" type="checkbox"/>	A Bassano	11/26/2002	04/06/2003	<a href="#">Goto Customer</a>
<input checked="" type="checkbox"/>	James Bates	08/23/2002	02/13/2003	<a href="#">Goto Customer</a>
<input checked="" type="checkbox"/>	Simon Bensimhon	01/22/2003	08/25/2003	<a href="#">Goto Customer</a>
<input checked="" type="checkbox"/>	S Benson	12/11/2002	07/06/2003	<a href="#">Goto Customer</a>
<input checked="" type="checkbox"/>	Daniel Botkiss	10/07/2002	01/07/2003	<a href="#">Goto Customer</a>
<input checked="" type="checkbox"/>	John Boyle	10/30/2002	01/09/2003	<a href="#">Goto Customer</a>

The customer list screen can be accessed in one of two ways. On the customer information screen, you can click List, or the criteria entered in the find customers screen finds more than one customer in the database. The Retail Sage has a list  
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option feature that allows you to individually select found customers to use in reports, mail merges, group lists, emails, and labels. To turn on the list option feature, click the List Option Off button on the customer list screen. The list option feature can only be turned off by clicking the List Option On button on the customer list screen or by going to the find customers screen, entering in new search criteria, and choosing to replace the list criteria.

When the list option is off, the following options are available:

View Filtered Customers: lets you scroll through the customer list on the customer info screen by clicking the arrow buttons (you should click this button again or reset all filters to view all customers on the customer information screen.)

Goto Customer: opens the customer information screen for the customer to the left of the Goto Customer button

Delete: deletes the recalled customer group

Report: opens the report menu screen

Search: opens the Find Customer Screen

Close: goes back to the customer information screen

When the list option is turned on the following options are made available:

Mail Merge: fills the mail merge table with the names/addresses of the customers on the customer list. After the table is filled, a list of available mail merge letters appears (Figure 19.) You can select any of the letters which are automatically opened in Microsoft Word.

E-mail: opens the default e-mail program and prefills the e-mail addresses of the customers in the customer list, email subject, and the email body. (There are three list boxes to the right of the email button. From top to bottom, the list boxes select the text for the email to line if there is more than one email recipient, email subject, and email body, respectively. To send copies of the same email to multiple recipients, you must mask the email to line of the email so that the recipients cannot see each other's emails. The server will only reject the initial text email to line chosen.)

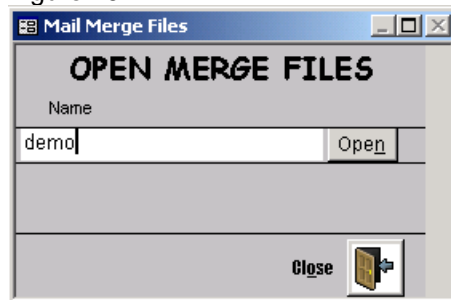
Select All: selects all of the displayed customers

Add: stores the selected customers under the name entered to the left of the Add button (to add a group, turn on the List Option, check the desired customers, type in a new group name in the box to the left of Add and then click Add)

You can change any of the stored customer group names by changing the group name title at the top left of the screen.

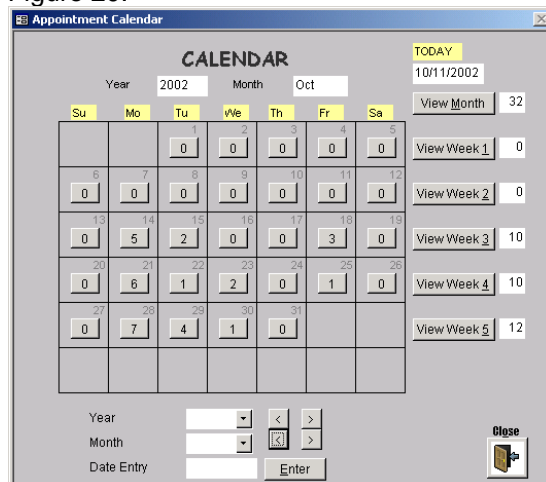
Open Mail Merge Letter screen:

Figure 19:



Calendar screen:

Figure 20:



The calendar screen graphically displays how many appointments you have for each day of the selected month. The values next to the year and month labels under the calendar title specify which year and month is being shown. The buttons in each of the day boxes reflect a count of the total number of appointments for that day. A star next to the appointment count for any of the days shown means that you have an appointment with the current customer on that day. By clicking on any of the appointment count buttons on the calendar screen, the system opens the appointments screen for the date clicked.(discussed below)

the entry boxes next to the year and month labels at the bottom of the screen allow you to pick which year and month you would like to see.

the arrow buttons next to the entry boxes let you move between the year and month, respectively.

View Month: displays all of the appointments for the month chosen

View Week (1..6): displays all of the appointments for the week chosen

Enter: opens the appointment screen for the date in the date entry box

Close: goes back to the customer information screen for the current customer.

Appointments screen:

Figure 21:



The appointments screen shows a detailed listing of your appointments. The appointments screen can be accessed in two ways. When you clicks on an appointment count button on the calendar screen, the appointments for that day are displayed on the appointments screen. The other way is for you to click the appts button on the customer information screen. This brings up all of the appointments in reverse chronological order for the current customer.

Add: opens the expanded appointment entry screen to enter new appointments. If the appointments screen is opened from the calendar screen, the date for new appointments is automatically filled in with the date chosen on the calendar screen.

Delete: removes the appointment highlighted

Add Appt: automatically adds a copy of the appointment to the customers notes (this only works when a customer has been selected in the white box under customer)

Add LM: automatically adds a left message note to the customer's notes with a date and time of the appointment (this only works when a customer has been selected in the white box under customer)

Calendar: is only visible if the appointments screen was opened from the calendar screen. If the calendar button is clicked, the calendar screen is opened to the month and year formally selected in it

Print Schedule: creates an hourly appointment schedule for the current day

Print: opens the appointment report

Close: goes back to the customer information screen with the current customer's information

C: lets you graphically select dates

Expand: displays the current appointment in the expanded appointment screen

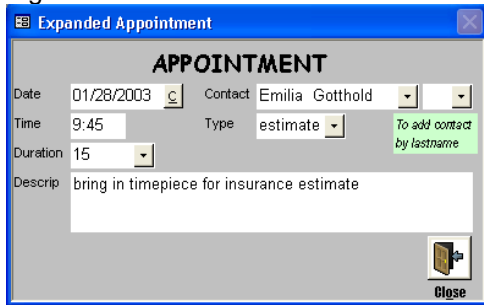
Goto Customer: on the right of each appointment opens the customer information screen for the customer selected

When an appointment date, time, or duration are entered or changed, the system performs a check to make sure there are no overlapping appointments. If there are overlapping appointments, you are informed.

If you click the Add button, an expanded appointments screen is displayed. If you entered the appointments screen from the calendar screen, and click Add to enter in a new appointment, the date selected from the calendar screen is automatically inserted as the date for the new appointment. The current customer is automatically inserted as the appointment customer if you entered the appointments screen from the customer information screen.

Expanded Appointment screen:

Figure 22:



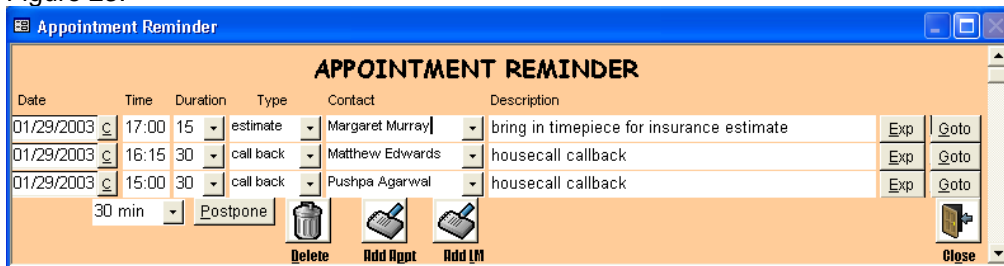
Time must be entered in 24-hour format.

Close: goes back to the appointment screen to the current customer appt

C: lets you graphically select dates

Appointment Reminder screen:

Figure 23:



The appointment reminder screen appears before a scheduled appointment. This feature is activated in the utility setup screen. Depending on the settings in the utility setup screen, the system checks for upcoming appointments on a selectable interval. The appointments are checked by a selectable period in advance.

Postpone: adds the time in the box to the left of this button to the current appointment time.

Delete: removes the appointment highlighted

Add Appt: automatically adds a copy of the appointment to the customer's notes (this only works when a customer has been selected in the white box under customer)

Add LM: automatically adds a left message note to the customer's notes with a date and time of the appointment (this only works when a customer has been selected in the white box under customer)

Close: goes back to the customer information screen with the current customer's information

C: lets the user graphically select dates

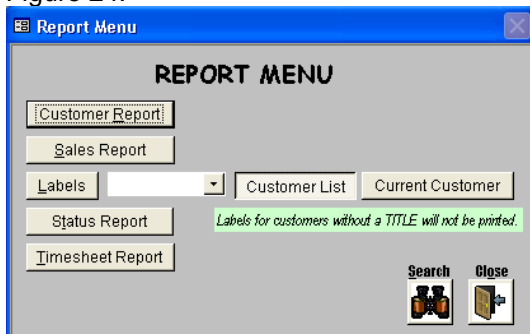
Expand: displays the current appointment in the expanded appointment screen

Go To Customer: on the right of each appointment opens the customer information screen for the customer selected

When an appointment date, time, or duration is entered or changed, the system performs a check to make sure there are no overlapping appointments. If there are overlapping appointments, you are informed.

Report Menu:

Figure 24:



The report menu lets you access all of the system reports.

Customer Report: opens the customer report setup screen

Sales Report: opens the sales report setup screen

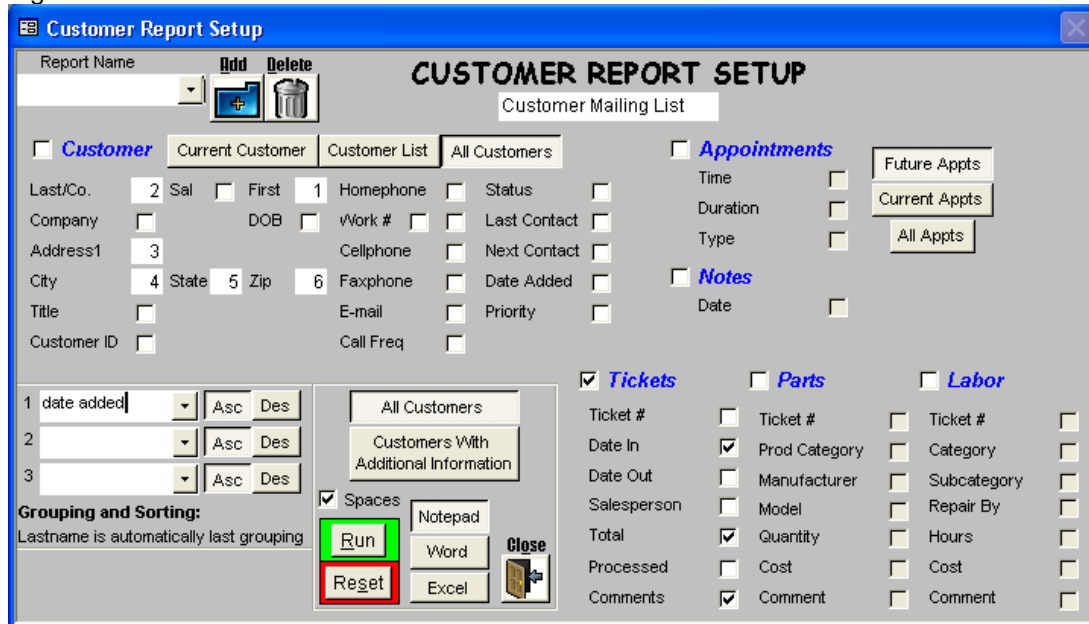
Labels: opens the label screen formatted by label type selected

Customer List/Current Customer selector: selects which customers will be printed in label form

Timesheet Report: opens the timesheet report setup screen

Customer Report Setup:

Figure 25:



The report setup screen lets you create a text report that contains customer information with/without appointments, notes, or tickets. You have the ability to save and name report settings and recall those anytime. The report setup screen is broken down into sections. The customer section lets you pick which customer data will be displayed on the report and the order of the data. Clicking on any of the fields (customer id, city, home phone, etc.) in the customer section causes the checkbox to be replaced by the order number for that field. The current customer/customer list/all customers selection next to the customer checkbox selects which customers will be displayed in the report. Current customer only displays the last customer selected in the customer information screen. Customer list displays the list generated and stored by the list recall feature.

You can select only one report type (customer/appointments/notes/remarks/tickets (within tickets, the user can select any combination of tickets, parts, and/or labor). The fields in the appointments, notes, and tickets sections let you pick which additional data in addition to the core data is displayed in the report. (Core data such as appointment date and appointment description are automatically displayed in the report if the appointments report is chosen.)

The future appts/current appts/all appts choice beside the appointments section lets you choose which appointments are displayed. Future appointments only display appointments scheduled today or in the future. Current appointments only display appointments for the last day selected from the calendar screen.

If the appointments, notes, remarks, or tickets reports are chosen, you also have the option of selecting whether all customers are displayed, or only customers that have the chosen report data are displayed. (A customer with no appointments will not be displayed if the latter choice is active and the appointment report is selected.)

Add: add new reports to system.

combo box in the top left of the screen lets the user pick from previously saved reports.

Run Report: runs the report

Reset: clears all the report choices. This is the only way to reorder the data types for the customer section.

Close: goes back to the report menu.

To save a new report setup, click the Add button and type in a new report name in the white box under the title.

TICKET INFORMATIONS ARRANGED BY CUSTOMER				
LAST NAME	FIRST NAME	HOME PHONE	WORK PHONE	WORK EXT
DATEIN	TOTAL	COMMENTS		
-----				
Jackson	William	(301)949-0538	(301)949-0908	
05/14/2002	\$60.00	worked on RLX J54BF9GS		
06/17/2001	\$75.00	worked on CHE 0257		
05/10/2001	\$100.80	Sold SLG 71F3319L		
11/05/1999	\$20.00	worked on HMM 99143		
10/22/1999	\$644.70	Sold RLX 931B92		
02/15/1998	\$15.00	worked on CNC M6811		
-----				
Jones	Albert	(301)770-0326	(301)770-5716	
09/28/2002	\$6.00	worked on LCN 530MM		
09/07/2002	\$15.00	worked on SLG 73AF33I		
02/08/2002	\$30.00	worked on SEK OF512		
12/23/2001	\$75.00	worked on RHY 350N1197		
11/29/2001	\$30.00	worked on SLG 4Q032		
11/05/2001	\$60.00	worked on RHY 2Q452		
-----				
Josephs	A	(301)770-0418	(301)770-8053	212
09/05/2002	\$60.00	worked on SEK Y1699991		
01/04/2002	\$20.00	worked on RLX 30F6YE9N		
02/18/2001	\$75.00	worked on SEK D54V231K		
12/31/1999	\$184.80	Sold OMG 077616		
-----				
Josh1	Manju	(301)770-0026	(301)770-9310	
08/16/2002	\$75.00	worked on LCN 2161A21		
04/25/2002	\$6.00	worked on SLG 38B9		
07/05/2000	\$20.00	worked on CNC 4101		
02/01/2000	\$60.00	worked on PPK 90852230		
05/10/1999	\$30.00	worked on CNC 624ME401		
03/10/1999	\$20.00	worked on SLG 7026		
02/12/1999	\$401.10	Sold SLG 38B9		

Sales Report Setup:  
Figure 26:

The sales report setup screen lets you create a text report that contains ticket information broken down by user selectable periods (daily, weekly, monthly, quarterly, semi-annually, annually.) You can save and name report settings and recall those anytime they wish. The sales report setup screen is broken down into sections. The date range section lets the user enter a start and an end date for the sales report. The criteria section lets you enter criteria to filter tickets that will be displayed on the report. The sales total, by a selectable period, for the tickets selected is automatically totaled and displayed. The customer section lets you pick which customer data will be displayed on the report and the order of the data. Clicking on any of the fields (lastname, city, home phone, etc.) in the customer section causes the checkbox to be replaced by the order number for that field. The ticket section lets you pick which ticket data will be displayed on the report. The format of the data output is date period, customer information, ticket information, ticket parts, and ticket labor.

Add: add new reports to system.

Run Report: runs the report

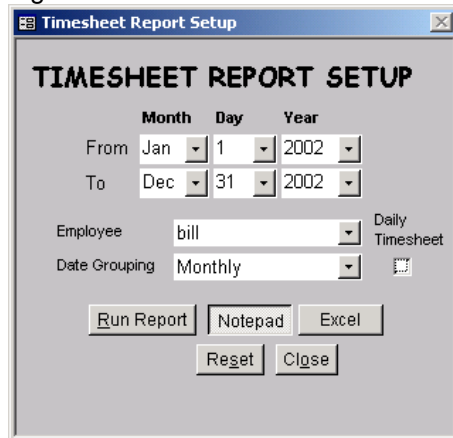
**Reset:** clears all the report choices. This is the only way to reorder the data types for the customer section.  
**Close:** goes back to the report menu.

To save a new report setup, click the Add button and type in a new report name.

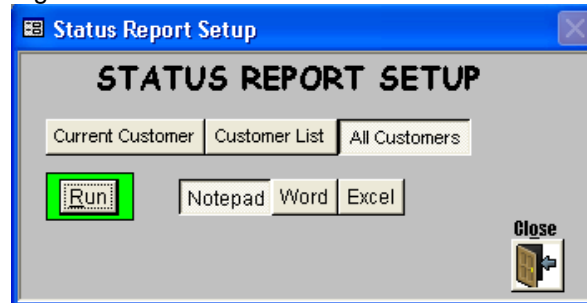
SALES REPORT Between 1/1/2002 and 1/31/2002 weekly  
 For Parts: -Sligh

LAST NAME	TICKET	HOME PHONE	DATE IN	TOTAL	COMMENTS	PARTS COST	LABOR COST
		MANUFACTURER			MODEL		
		CATEGORY			SUBCATEGORY		
-----							
01/01/2002-01/07/2002							
Bender		(301)770-0145					
	soId		01/01/2002	\$550.20	soId SLG J4A1H061		
			Sligh		J4A1H061	\$524.00	
-----							
Caro		(703)549-0082					
	soId		01/02/2002	\$6.00	worked on SLG 2D11G		
			Sligh		2D11G	\$0.00	
			Services		Change Watch Battery	\$6.00	
-----							
Scarff		(301)942-0169					
	soId		01/02/2002	\$60.90	soId SLG 40R5		
			Sligh		40R5	\$58.00	
-----							
Kehoe		(301)681-0012					
1607			01/04/2002	\$60.00	worked on SLG GSK067IL		
			Sligh		GSK067IL	\$0.00	
			Services		Repair	\$60.00	
-----							
Veirs		(301)942-0093					
	soId		01/04/2002	\$882.00	soId SLG 6086084		
			Sligh		6086084	\$840.00	
-----							
Andrews		(301)949-0487					

Timesheet Report Setup:  
 Figure 27:



Timesheet Report Setup:  
 Figure 28:



The timesheet report setup screen lets you create a text report that contains employee timesheet information broken down by selectable periods (daily, weekly, monthly, quarterly, semi-annually, annually.) The timesheet report setup screen is broken down into sections. The date range section lets you enter a start and an end date for the sales report. The criteria section lets you enter criteria to select the employee and date grouping that will be displayed on the report. The total hours, by a selectable period, are automatically totaled and displayed.

The status report lets you create a status change report with customers along the side and the various status choices along the top, filled with the date that the customer changed each status.

**Run Report:** runs the report

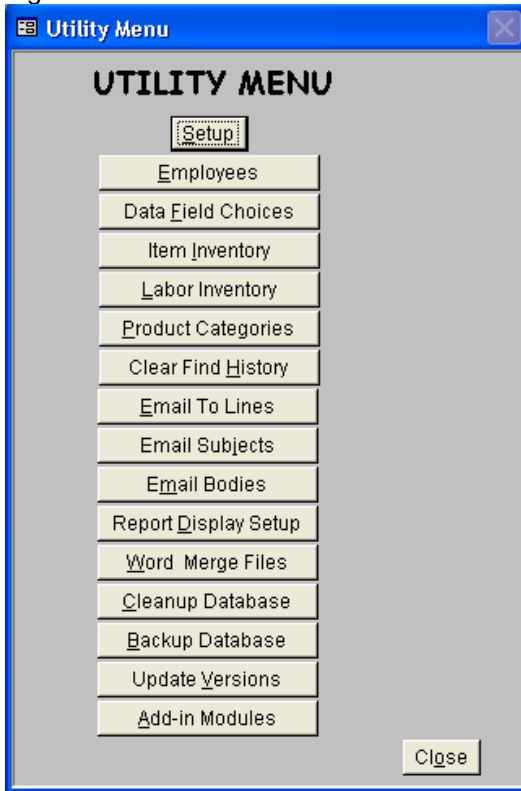
**Reset:** clears all the report choices. This is the only way to reorder the data types for the customer section.

**Close:** goes back to the main menu.



Utility Menu:

Figure 29:



Setup: opens the setup screen

Employees: opens the employee screen

Data Field Choices: opens the screen choices screen

Item Inventory: opens the screen choices screen

Labor Inventory: opens the screen choices screen

Product Categories: opens the screen choices screen

Clear Search History: opens the screen choices screen

Email To Lines: opens the email to line screen

Email Subjects: opens the email subject screen

Email Bodies: opens the email body screen

Report Parameters: opens the report parameters screen

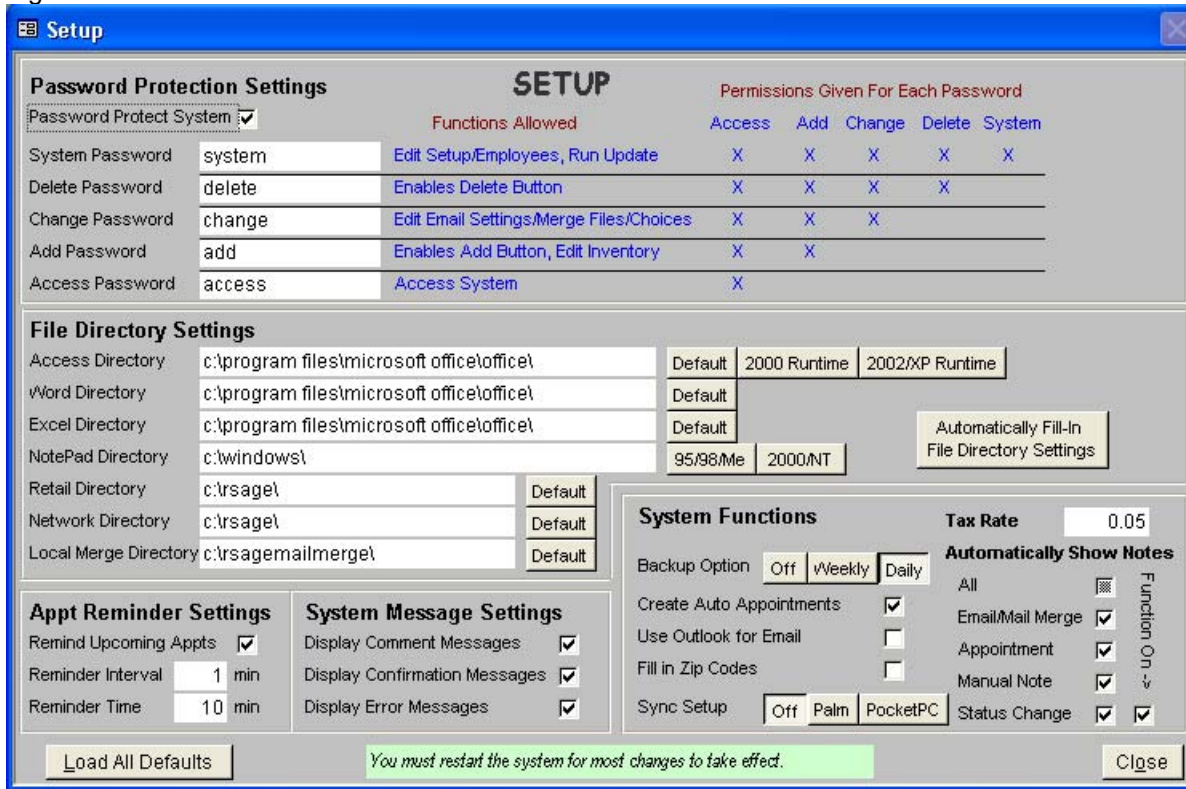
Word Merge Files: opens the edit merge files list screen

Cleanup Database: repairs data entry errors

Backup Database: runs the backup program

Uppdate Versions: runs the update version program

Setup screen (utility):  
Figure 30:



The system setup screen in the utilities menu lets the administrator setup password protection for the system, select the directories for applications the system uses, and setup the appointment reminder, system message settings, auto appointment, auto backup, and status note systems.

If the automatic user ID is not used or the user ID is unknown, a user has the option of entering in a password on the start screen. Certain functions in the Retail Sage can be password protected. Specifically, access to the system, adding data, changing data, deleting data and accessing the system setup screens, can all be separately granted through multiple passwords. The password on/off option enables and disables the password protection features of the Retail Sage. The row to the right of each functional password explains the functions allowable under each password.

Directory Label	Path To	Problems if directory invalid
Access directory	Microsoft Access	not be able to re-enter the Retail Sage from the backup program
Word directory	Microsoft Word	not be able to run word reports or the mail merge files from the system
Excel directory	Microsoft Excel	not be able to run Excel reports
Notepad directory	Microsoft Notepad	not be able to run customer or sales reports to notepad
Retail Sage	rsage.mdb	the backup program and version update programs will not work
Network directory	network rsage.mdb	the backup program will not work from a remote machine
Local merge	\rsagemailmerge\	simultaneous users will overwrite each other's reports

Automatically Fill In Directory Settings: lets the system look for necessary files and lets you choose from the files found to fill in the directory settings.

Appointment Reminder Settings: checkbox enables/disables the pop-up appointment reminder window. The appointment reminder interval establishes the time period that the system waits between checking for appointments. The appointment reminder time sets the time period that an appointment reminder box appears before an appointment.

The System Message Settings lets you turn system messages on/off. As a user becomes more familiar with the Retail Sage, the Comment and Confirmation Messages can be disabled. The Error messages should be left on for most users.

The Retail Sage gives you the option of having the system automatically remind you to backup daily or weekly.

The auto appointment checkbox is used to turn the master auto appointment feature on-off. The auto appointment feature automatically sets up an appointment based on the call frequency selected for each customer. You can turn the auto appointment checkbox on/off for each customer.

If you will be synchronizing the system with a PDA (Palm or Pocket PC), you must click the appropriate device type for the synchronization to work.

Automatically Show Notes: All notes in the system can be checked to appear on the customer information screen. This feature was designed because there is limited space for on the customer information screen. Each of the checkboxes in this section controls whether the system automatically checks the associated notes to appear on the customer information screen.

The status change checkbox to the right of the show status change notes controls if the system automatically add a status change note to a customer as that customer's status changes.

Employees screen:

Figure 31:

The screenshot shows a window titled "Employees" with a sub-header "EMPLOYEES". It contains a form with the following fields and values:

- Name: bill
- Login ID: bjacobs
- ID: bj
- Password: bj
- Repair Person:
- Address1: 1234 Main Street
- Address2:
- City: Rockville State: MD Zip: 20852-
- Home Phone: (301) 543-4754
- Work Phone: (301) 457-8734 Ext:
- Cell Phone:
- Fax Number:
- Email: bill.jacobs@abc.com
- Birth Date: 02/17/1952
- Start Date: 02/13/2000
- End Date:
- Display Comment Messages:
- Display Confirmation Messages:
- Display Error Messages:
- Permissions: System, Delete, Change, Add, Access

The employee ID for any unknown system user will be displayed on the start screen. The system administrator is responsible for adding users to the system. Each employee should have a separate personal password. The data entered in the ID box is what the system uses to recognize the user. The name is used to confirm the user's identity. The administrator or first user should give themselves SYSTEM permission.

Data Choices screen:

Figure 32:

The screenshot shows a window titled "Screen Choices" with a sub-header "DATA CHOICES". It contains a table with the following data:

Appointment Type	Credit Card	Status
estimate	Visa	customer
drop off	Mastercard	lead
housecall pitch	American Express	other
call back		
auto appt		

Data choices are used to standardize the appointment system and the ticket payment fields. Using these choices lets you more effectively search through the data in the system.

Part Inventory screen:

Figure 33:

**PARTS INVENTORY** 1 of 573

**Filter Inventory**

Product Category: Grandfather Clock Quartz  
 Manufacturer: Sligh  
 Model: 002418U5  
 Description: steel finish with ivory dial  
 Retail Price: \$1,645.00  
 Cost: \$904.75  
 Shipping: \$109.00  
 Date Added: 05/29/1998  
 Date Deleted:   
 On Hand: 2 (Partially Received, All Received)  
 On Order: 0 (Date Ordered, Date Expected, 1 Ordered)

Buttons: Add, Delete, Close

Labor Inventory screen:

Figure 34:

**LABOR INVENTORY** 1 of 8

**Filter Inventory**

Labor Category: Add Services  
 Labor Subcategory: Appraisal  
 Description: determine value by reviewing current price trends  
 Labor Hours: 0  
 Retail Price: \$20.00  
 Cost: \$11.20  
 Labor Category:   
 Buttons: Add, Delete, Close

Inventory Categories screen:

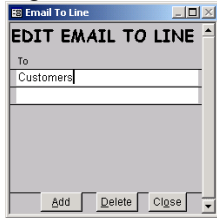
Figure 35:

**INVENTORY CATEGORIES** Add Delete

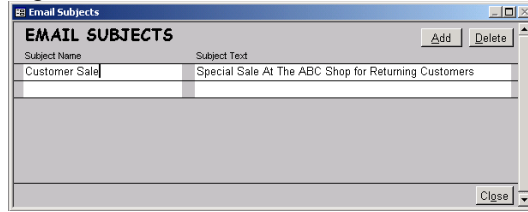
Manufacturer	Manuf ID	Product Category	Prod Cat ID	Labor Category	Labor Cat ID	Labor SubCategory	Labor SubCat ID
		Pocket Watch Quartz	PWQ				
		Grandmother Clock Quar	GMQ				
Bishop, Adams	BPA	Wall Clock Quartz	WKQ			Estimate	EST
Chelsea	CHE	Desk Clock Quartz	DKQ			Pressure Test	PST
Concord	CNC	Wall Clock	WCK			Appraisal	APR
Geochron	GEO	Novelty Quartz	NVQ			Repair	REP
Hermle	HRM	Wristwatch	WWV			Overhaul	OVH
Howard Miller	HWM	Grandfather Clock	GF	Add Services	ADS	Oil Clock	OIL
K. Moser	KMR	Pocket Watch	PW			Adjust Band	ABD
Loricron	LCN	Grandmother Clock	GM				
Omega	OMG	Grandfather Clock Quartz	GFQ				
Phillipe Patek	PPK	Desk Clock	DSK				

Close

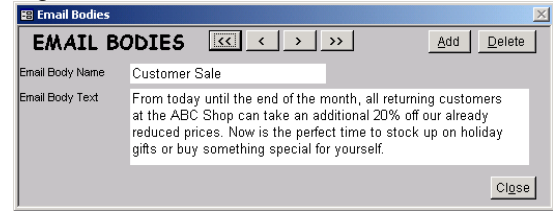
Email To-Line  
Figure 36:



Email Subject Screen:  
Figure 37:

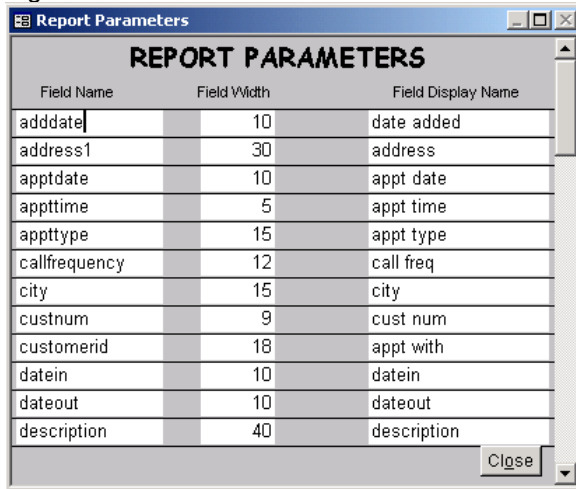


Email Body Screen:  
Figure 38:



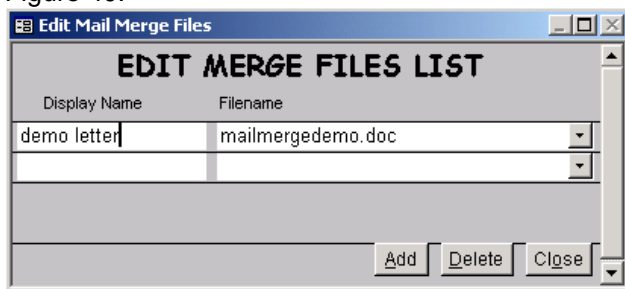
The names of the Email Subjects and Bodies are displayed in the list boxes at the bottom of the customer information and customer list screens. The email body can be unlimited in length and can include carriage returns.

Reports Parameters screen:  
Figure 39:



The report parameter screen lets you change the field column name and width that appear in the report generator output. The width of each column is determined by the greater of the column width entered or the character count in the column name.

Edit Merge Files List Screen:  
Figure 40:



The name of the merge file is displayed on the Open Merge Files screen. The filename of the merge file must be exact and must also include the file extension. Clicking on the down arrow displays a list of the \*.doc files in the mailmerge directory for you to choose from. The sample mail merge file name is **mailmergedemo.doc**.

## Search Guide

You can search on any data stored in the system.

From the Customer Information screen, you can search in any single field.

From the Find Customers screen, you can search among multiple fields.

**All searches return a list of customers that match the search criteria.**

The system uses symbols to specify ranges and values:

Symbol	Meaning	Field types for symbols
,	search for multiple values in a field (value 1 or value 2)	All fields
;	search for range values in a field (value 1 and value 2)	Number, Date fields
*	wildcard before or after search string in field	Text fields, Dates (PLUS search)
>	greater than (value 1 > search string)	Number, Date fields
<	less than (value 1 < search string)	Number, Date fields
=	Equal to (value 1 = search string) (for text fields, omit =)	Number, Date fields
<>	not equal to (value 1 <> search string)	Number, Date, Text fields
>=	greater than or equal to (value 1 >= search string)	Number, Date fields
<=	less than or equal to (value 1 <= search string)	Number, Date fields
+	PLUS Search: use wildcards for dates or add all values for each customer together for numbers	Number, Date fields
Null	empty (<> null - not empty)	Text, Date (use 0 for Number) fields

Examples:

Field	Search String	Meaning
Last name	a,b,c	find all last names beginning with "a" or "b" or "c"
Firstname	steve,mike	Find all first names that are "steve" or "mike"
Birthdate	>= 1/1/1950;<= 12/31/1964	find all birthdates from 1/1/1950 to 12/31/1964
Birthdate	+ 2/*/*	find all birthdates in February
Birthdate	+ 2/*/*;<= 12/31/1960	find all February birthdates in or before 1960
Note	prospect	Find notes starting with "prospect"
Note	*401k	find "401k" anywhere in notes
Phone	null	find all blank phone numbers
Phone	301	Find phone numbers with area code "301"
Balance	>= 1000	Find all single account balances greater than or equal to 1000
Balance	+ >= 1000	Find all combined account balances for each customer greater than or equal to 1000
Part Total	> 1000;+ >= 5000	Find all tickets whose total is greater than or equal to 5000 and which have at least one part greater than 1000
Processed	Y	Find all processed tickets

All text fields automatically have \* after the search string.

You must separate symbols and values with a space.