Business Management System

System Tutorial

Welcome

Thank you for your purchase or evaluation of our Business Management System!

We have strived to create the easiest, yet comprehensive, business software product available today. We continue to receive great acclaim as we strive to meet the ever-growing needs of the business community.

If you should find yourself desiring added functionality within the BMS please drop us an e-mail. We can customize this system to fit your precise requirements or develop other software applications from the ground up. If you have any suggestions we'd also appreciate hearing them.

Installation

Following the download of the Business Management System from our web site, simply double click the executable file (Windows) or expand the file (Macintosh).

A directory called **BMS** will be created on your hard drive and all of the required files will be placed within it.

Open the **BMS** directory and find the file **"StartBMS.EXE"** (Windows) or **"StartBMS"** (Macintosh). Simply double-click this file to start the program.

The files in the BMS folder that end with **USB** are data files that will be opened automatically when the program starts. *Do not open these files individually*.

The first thing you'll notice is that the BMS takes up your entire screen. The software is optimized for a screen resolution of 600x800. If you use a lesser resolution, for example 640x480, you will find vertical and horizontal scroll bars since there is more information then can be viewed on your screen. If possible, increase your screen resolution. If you have your resolution set to a higher selection, for example 1024x768, you will be able to see the full BMS screen, as well as blank space. This will not adversely affect the operation of the BMS.

There are several reasons why the BMS takes up the entire screen. They all hinge around ease of use and data integrity. By securing the operation of the software and allowing only the procedures we have built into the system, we can assure that no one can alter the critical data within, either knowingly or accidentally.

To use another application, for example an e-mail program, while leaving the BMS running, simply press the **Windows key** on your keyboard (Windows) or use the key combinations **CMD-TAB** and **CMD-SHIFT-TAB** to switch to another pre-opened application (Macintosh).

Step-by-Step Tutorial

If you have not already done so, open the **BMS** directory and find the file **"StartBMS.EXE"** (Windows) or **"StartBMS"** (Macintosh). Simply double-click this file to start the program.

Depending on the current System Configuration (can be changed at any time) and whether or not there are any pending Reminders, you will be taken to the Reminders screen. If there are no pending Reminders and depending on the System Settings selection, you will be taken to the Main Menu or the Main Screen.

If you begin on the Main Menu, press **Go To Main Screen**

This is a comprehensive view of one of your customers, prospects, providers, or any other category then may fit into.

The top portion of the screen, labeled Company Information, is dedicated to the contact information of this one person, or company.

To add a new person or company, click on **Main Menu** in the bottom, left corner of the screen, then click **Add Customer**.

There are six spaces for phone numbers to the right. The phone number labels (i.e. business phone) can be changed by simply clicking on it. This is useful for entering more specific descriptions such as "Cellular Phone." The graphics of telephones next to the numbers will use your computer's built-in dialer to call the number entered.

A nearly unlimited space for comments is provided just below. This area can contain any information. Information placed within the comments section can also be used later for finding a person or company quickly through a search procedure.

"Classification" is a way of placing each person or company into a specific category (i.e. client, prospect, provider). These categories can be easily edited as needed through the **System Settings** screen accessible from the Main Menu, then clicking **Lists**.

There are six pricing levels possible within the BMS (called "Pricing" here). You will see this further when we visit the Products screen. By using Price Levels you can control the amounts charged to different customers. For example, one of your customers might be of the wholesale type while others may be retail. Others may receive reduced or increased prices due to their purchasing history. Entering the appropriate letter here (a,b,c,d,e or f) will assure that the proper product or service pricing will automatically be applied when Invoicing.

Salesmen working for your company, whether full time, part time or on a commission basis, are entered into the BMS through the System Settings screen, then clicking **Security Setup**. Simply select the salesman, from the pop-up list, who is assigned to this customer, if applicable.

In the next box select the **Commission** percentage amount the salesman will receive when a sale is made. This can be altered at the time of Invoicing and even on a line-by-line basis.

If a **Tax Exempt #** is entered, tax will automatically not be charged when the customer is invoiced.

A **Discount** amount can be selected that will automatically be transferred to future invoices. When an invoice is added, this discount percentage can be altered, even on a line-by-line basis.

The **Web Site** box is intended for the client's web site. Simply click the "Web Site" text above the box to be taken to their site through your web browser (requires an Internet connection).

The **Contact History** section (blue and white box) shows in reverse chronological order (last contact first) all of the contacts you've had with this person or company. A single mouse click on one of the lines will bring you to the detail screen for further information or editing.

The **Invoice History** section is the same as above but displays all of the sales relating to this customer. Again, a single click allows access to the invoice detail or to enter a payment to that Invoice.

The **Personnel** box, to the right of the Contact and Invoice histories, contains persons within the company currently on the screen. For instance, there may be multiple people within a single company that use your services or buy your products. Simply clicking "Add Person" will create a new computer record for that person. For ease-of-use, the phone numbers, address, etc. is duplicated for you, but may be changed or removed for this particular person. Once there is more than one person associated with a company, just click on the person's name in the Personnel box to view or edit their information. Whichever person is currently selected (visible in the upper, left portion of the screen) at the time an invoice is created, that person's information will be placed onto the invoice.

Let's add a contact for this person or company (a contact is a record of a phone call, business meeting, or any other type of action which should be documented).

The buttons in the green section below (Add Contact, Add Invoice, etc.) pertain to the customer or person currently on the screen. To find another person or company you would simply click the **Search** button in the bottom, left corner and enter whatever information will pertain to them or even a group of records.

Press **Add Contact** in the bottom portion of the screen.

As you can see in the top portion, this contact is automatically assigned to the person or company that was on the Main Screen at the time the button was pressed. The contact is time and date stamped for you, although they can be changed if necessary. The **Made By** box is used to record who in your business made the phone call, etc.. A pop-up list will display any employees who have been entered into the BMS security area. To add employees, you would go to the Main Menu and press the **System Settings** button, then click **Security Setup**. If the security clearance system is turned on (from within the System Settings screen), which will require that a password be entered to access this program, the current user's name will be entered here automatically. The **Contacted** box is where the person's name who was contacted is entered. You may simply click on the appropriate line in the blue and white box to the right, which lists all persons associated with this company. Clicking on a person's name in the blue and white box will also set that person as the default for future contacts. To enter a name other than one previously used, simply press the escape key while the pop-up box is open and type in the name. The pop-up box will contain all names ever entered for this company. The **Type** of contact can be selected from the pop-up list, which can be edited as needed through the **System Settings** screen accessible from the Main Menu, then clicking **Lists**.

Pressing **Add New Contact** adds another contact for this person or company without returning to the Main Screen. To add a contact for person or company unrelated to the current one, you must return to the Main Screen or Main Menu.

The **Search Contacts** button provides a powerful tool for finding past contacts.

Adding a reminder for this customer (for example a promised phone call to follow up on this contact) is as simple as pressing the **Reminders** button.

Other features are available from the contact screen including sending or receiving an e-mail (optional feature), adding a graphic image (i.e. scanned letter), or writing a Memorandum.

Press **Return**

Press **Main Menu.**

Press **Products** under the *Other Information* bar.

Press **Add New Product**.

Enter a sample product name into the *Description* box, for example – Widget.

Click **Pricing**.

In the *Unit Price* boxes enter prices for the different price levels, for example $3.29 for level "A", $3.09 for level "B" and so on. This gives you the ability to set different pricing structures for different types of customers. For example, wholesale customers may all be set to Pricing Level "C" while others may always receive a discounted for any other reason and be set as Level "D". You make these decisions yourself assigning groups to a particular pricing levels. These prices are automatically brought onto Invoices as they are entered. Each customer is assigned a Pricing Level on the Main Screen.

None of the other information on this screen is required, yet a great amount of flexibility is built in. Volume Discounting, Raw Materials and Inventory Control are just a few of the options you have for each and every product record to assure you the necessary functionality you will need.

Press **Main Menu**.

Press **Main Screen**.

Let's add a Quotation for this customer or person. A Quotation gives you a quick way to create a preliminary document prior to a sale. It can be used for providing a prospect or customer with a written cost basis for their requested products or services. Once a Quotation is entered into the system an Invoice is just a click away. Backorders are created automatically for products not in inventory.

The **Quotation** button on the bottom of the screen will create a new Quotation for the customer currently on screen. If one or more Quotations already exist for the customer the button will appear with the amount of Quotations in the system. If one or more Quotations exist, pressing the button will take you to a screen, which lists the existing Quotations. From there you can edit an existing Quotation or create a new one.

Press the **Quotation** button

If no Quotations currently exist you will be presented with the option of creating one at this time.

Click **YES**

The Quotation is completed in the same way as an Invoice. Simply enter the basic information, including Date, Salesperson, etc., then select the products and/or services from the pop-up list. An unlimited amount of item lines can be added. The **Signature Line Text** prints at the bottom of Quotations. An example would be a disclaimer or return information. If you would like the information you enter into this box to be included automatically, as the default, onto future Quotations press **t**he **Use Signature As Default** button.

The Inventory of items entered onto a Quotation is not affected since the sale has not yet been made. Transferring items on the Quotation to an Invoice is as simple as pressing the **Quotation>Invoice** button.

Pressing the **Quotation>P/O** button will create one or more Purchase Orders automatically. If the products listed on the Quotation come from different suppliers (as entered onto the Product screen) one Purchase Order will be created for each supplier.

Press **Return** and you will be taken to the Main Menu.

Let’s add an Invoice. There are two ways to accomplish this. From the Main Screen pressing the Add Invoice button will create an Invoice for the customer currently on screen. From the Main Menu, you will be able to select the customer from a list.

Press **Main Screen**

Press **Add Invoice**

Most of the information on the top of the Invoice is self-explanatory. The Discount Percentage (Disc %), Salesman's Commission Percentage (Cmsn %) and the Tax Exempt # are automatically taken from the data entered on the Main Screen. Only the Tax Exempt # can not be changed on the Invoice itself. The Discount Percentage can be adjusted at this time and *will* effect *this Invoice only*. The Discount Percentage can also be adjusted on any line of the Invoice.

To enter line items onto the Invoice, simply select the product or service from the pop-up list. While the list is open simply type the first few characters and the list will seek that entry. Just use the mouse or arrow keys to move to the desired line and press **Enter**.

When an item is selected onto the Invoice the current Inventory level, Unit Price, Discount Percentage and Commission Percentage is automatically entered for you. The Quantity defaults to "1" but can be changed as necessary. The Inventory amount will continue to reflect the amount in stock *prior to this Invoice*.

Items can also be entered onto Invoices via a barcode reader. *The barcode reader must be of the "wedge" type, which connects between the computer and the keyboard*. To use this feature you must first tell the BMS which barcode relates to which product. This is done from the Product Screen. Simply find the desired Product, click **Edit Bar Code** and scan in the product's label. When on the Invoice screen, click the **Bar Code Entry** button. You are now ready to begin scanning products onto the Invoice.

Terms & Conditions will print on the Invoice. The default text for this area can be in the System Settings area accessed from the Main Menu.

Payment information is entered in the blue and white box at the bottom of the screen. An unlimited amount of payments can be entered for any Invoice.
Payments on Invoices in the BMS are always made to particular Invoices, not the customer's general account.

If a customer makes payment for more than one Invoice at a time, simply press the **Client's Bulk Payment** button on the bottom of the screen. This allows you to only enter the payment information once. The payment will be split automatically onto Invoices with a balance, *starting with the earliest*. If you should need to customize the payments onto particular Invoices, you must do it manually by editing the Invoice and entering the payment information.

Pressing the **Add Invoice** button from the Invoice screen will add an Invoice for the same customer.

There are two Invoice entry screens available to you. You can select the appropriate one in the System Settings area accessible from the Main Menu. The Invoice screens are identical except that the Product/Service cost is displayed on one of the screens and not the other. The purpose for this is to provide you with timely information for immediate decisions regarding discounts, etc..

Press the **Return** button.

There are many additional features to the Business Management System including Purchase Orders, Expense Tracking (including check writing and multiple account flexibility), Supplier information and a full reporting system. Feel free to look around the BMS further and enter sample records. The only limitation to the evaluation version is the amount of customer records you can add.

We look forward to hearing from you and working in together to assure the BMS or any other software solution we may create for you, will make your business life easier and more fulfilling.

888-336-6227
info@ccs2001.com
www.ccs2001.com