



CYCLONE
SOLUTIONS

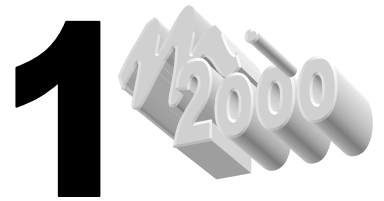
Support: 1-800-925-6723

Mistral *2000*

User Guide

CHAPTER 1

Getting Started



Congratulations! You have just joined the ranks of all the proud owners of Mistral 2000. For those of you who are just starting to use a computer, you will see very soon all the benefits associated with its use and you will ask yourself how you have been working without it for such a long time.

Mistral 2000 has been designed by you "our users" and especially for you. Every system function has been developed to meet requirements of the carpet cleaner business. Its use is simple, intuitive and demands only a short learning time.

Mistral 2000 is the newest software in the carpet cleaning industry. This system is developed to bring you all the advantages of the Windows environment.

It is now time to discover your new software! Look around, enter new customers, technicians, and services, create new quotations, work orders and invoices. You can always call us if you need assistance. Our business hours are Mon – Fri, 9 am to 5 pm Eastern Standard Time.

Thank you for your interest and enjoy!

Hardware requirements

The computer

- PC with a Pentium processor 100 MHz or more
- Windows 95, 98, ME and NT
- A minimum of 16 Mb of RAM
- 5 Mb of free space on the hard disk

The screen

- VGA with a 800 X 600 resolution (recommended)

The mouse

- Compatible Microsoft Mouse

The printer

- Compatible with all kinds of printers

Starting up

Mistral 2000 works like all the Windows based software. For the ones that are not very familiar with those concepts, please read your Microsoft Windows operating system guide. This guide introduces you to Windows and gets you up and running quickly.

Installation

From the CD-ROM

Insert this CD-ROM into the drive, and wait a few moments. If the installation program starts, follow the on-screen instructions.

If the installation program doesn't start, press the START button on the bottom of your screen, choose **RUN...** and type **d:\setup** where "d" is the drive letter for your CD-ROM. Press OK.

General principles and functions

Mouse and keyboard operations

There are many ways to move in the software windows:

- With the arrow key:
- With the **"Tab"** key
- With the combination of the **"Ctrl"** key and a **"Letter"**
- With the mouse

With the **"Tab"** key you navigate to the next field.

With the combination: **"Shift"+ "Tab"** keys you navigate to the previous field.

With the combination: **"Ctrl" + "The underlined letter"** you activate the corresponding button in a dialog box.

With the **"Esc"** key, you can go back at the previous window; it works as the cancel button.

The **"Enter"** key let's you confirm your choice(s).

What is Mistral 2000?

The elements of Mistral 2000 and their links

Here are the main elements that are involved in Mistral 2000. Each one of these elements has its own attributes and how they interact with each other...

Your company(ies)

Your company is an entity for Mistral 2000. Your company has a name and a location. Your company is located in a country, a state or a province, and has to pay taxes. Your company uses a chart of accounts, performs services and makes advertising. Your company is a business and as a service business system, Mistral 2000 needs all your company information in order to help you manage your company.

Your customers

As a business, you interact with customers. They call your company and ask for your services in exchange of money. Your customers are very precious for your company and you need to record all their information in Mistral 2000. That way, it will be easier for you to keep a better relation with your customers.

Your employees

Your company probably has employees. Those employees are ready to work for you in exchange of money. Those employees are probably related to the services you offer to your customers and it is very useful for you, the manager, to know as much as possible all the information about your employees and their activities in your company.

Your jobs

You need these for your company to Survive. You might have a beautiful company; a huge list of customers and the best employees on this planet, if you don't have jobs... you have nothing. The jobs are a combination of all the previous entities. The jobs are built from your company, customer and employee information.

Just remember those entities and you will understand Mistral 2000.

The information Mistral 2000 needs

Here is all the information you have to enter in Mistral 2000. Mistral needs this information in order to be able to give you the outputs you need to manage your company.

Company information

"Setup before using Mistral 2000"

- Company name and address
- Tax rate(s)
- Area code, state or province and zip codes range
- Jobs preferences
- Chart of accounts
- List of services
- List of sources (advertising)
- Payment types accepted

Customers

"Can be entered anytime"

- Name and address
- Phone numbers
- Types
- Source
- Default rebates and price
- Other pertinent information for your company
- Callback information

Employees

"Setup before using Mistral 2000"

- Name and address
- Type
- Commissions

Job information

"Can be entered anytime"

- Type (Quotation, work order, invoice or contract)
- Customer information
- Date
- Services to perform
- Schedule information
- Employee information
- Source information
- Comments and notes
- Payment information
- Job template
- Job preferences

Mailing information

"Can be entered anytime"

- Customer information
- Mailing template (personalized letter, postcard, labels, etc.)

The outputs of Mistral 2000

Quotations, work orders and invoices

- Mistral 2000 prints all your jobs. You can use a laser, an inkjet or a dot matrix printer. The jobs print with all the information and the layout you need in accordance with the job template you created.
- Your invoices can have more than one page and you can print a personalized letter and an envelope at the same time.
- You can use the batch printing option to print more than one job.

Reports

- Mistral 2000 can create a wide range of reports.
- You can visualize before printing.
- Define the filters.
- Select the information you want to see.
- Export these reports to a text file.

Lists

- Visualize and print your customers' list.
- Visualize and print your jobs' list.
- Visualize and print your employees' list.
- Visualize and print your sources' list.
- Visualize and print your payment types' list.
- Visualize and print your services' list.

Schedule

- Mistral 2000 prints the schedules in two formats: graphical or text.
- Mistral 2000 prints the schedule information that you setup.

Callback

- Mistral 2000 creates for you a daily list of all the customers you have to call back or send a reminder to.

Mail merge

- Mistral 2000 contains all the functions you need to perform a mail merge without the need of any external program. You can use Mistral 2000 to create your own personalized mailing labels or letters.

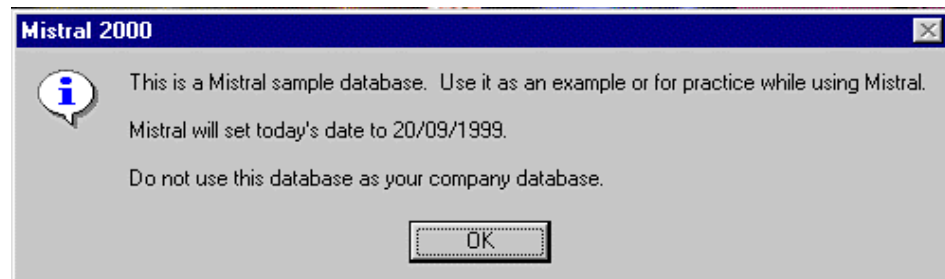
Starting Mistral 2000

To run Mistral 2000, first start your computer, and then double click on the Mistral 2000 icon located on your desktop to initiate the program. The software comes complete with 2 companies. A clean database called Company data and a sample company full of dummy data.

Sample Company

Mistral 2000 comes with a Sample Company. You can use this Sample Company to practice and learn how to properly use the program. This Sample Company contains customers, employees and jobs. It also contains information that you might want to keep for your company such as the chart of accounts and the list of services.

Every time you will open the Sample Company, your date in Mistral "not your system date" will returned to the September 20th 1999. All the jobs and all the information for this company (like the schedules) are entered around this date, it easier for the user to understand and learn the program.



Mistral 2000 windows

Here are some examples of windows you will find in Mistral 2000.

Main menu

This window is the first image you see when you open Mistral 2000. The mouse is the only device you can use in this type of window. Clicking on one of the seven options will provide access to the different parts of Mistral 2000. The Main Menu stays always open. To return to it from another part of Mistral, click on the Main Menu tab located at the upper left corner of your screen.



List

You will find this type of window all over Mistral 2000. We use it to show you all kind of items such as customers, services, jobs, accounts, etc.

Number	Company	First name	Last name	Phone	Address 1	Zip/posta...
		Steve	Bratt	(705)321-4568	4945 Wilfrid	85200
		David	Hamburg	(705)456-5623	6574 Balzac	85321
		Robert	Mahan	(705)465-3214	4536 Hamilton	85233
		Denise	Vulik	(705)466-6544	5687 Rosedale	84900
		Sue	Hamblin	(705)223-4568	3545 Viau	85659
		Paul	Rocco	(705)654-9854	876 Micheal	85543
		Nancy	Mollino	(705)654-4735	654 Stern	85124
		Paula	Roberts	(705)456-7852	1222 Lazard	85124
		Diana	Hall	(705)654-2222	777 Bates	85236
		Jane	Rankin	(705)421-3256	7655 Edwards	85005
		Don	Ranger	(705)455-5555	6544 Plessis	85111
		Amy	Lightfoot	(705)477-5465	9878 Green	85542
		Angela	Libertella	(705)644-4654	786 Hall	85264
		Brenda	Leach	(705)654-4544	7655 Long	84999
		Dana	Leary	(705)455-7895	876 Mountain	84755

Job

This type of window is used to build your jobs. It shows the job layout, as it will print.

The screenshot shows the 'Mistral 2000 - [Invoice]' window. The title bar includes 'File', 'Copy/Paste', 'Job', 'View', 'Window', and 'Help'. The menu bar has 'Main Menu', 'Unpaid invoices', and 'Invoice'. The toolbar contains icons for 'Info', 'Customer', 'Site', 'Source', 'Services', 'Schedule', 'Note', and 'Paym.'. The left sidebar has buttons for 'Templ.', 'Print', 'Callback', 'Save', and 'Close'. The main area displays the 'CYCLEAN' logo and 'Invoice' title. Below the logo is the address: '1290 Main St., Springfield, AZ 85220, 705-787-4561'. A table shows the date '12/09/1999' and number '12'. Another table shows the customer and site information.

Date	Number
12/09/1999	12

Customer	Site

Dialog box

This type of window is used to enter information in Mistral 2000. It contains fields that need to be filled with information. All the fields have a label to tell you what information to enter. There are several ways of entering the information in a field. Refer to the next section to learn how to use all the dialog box controls.

The screenshot shows the 'Leach, Brenda' dialog box. It has three tabs: 'Main info', 'More info', and 'Payments'. The 'Main info' tab is active. It contains various input fields for contact information, including 'Number', 'Company', 'Mr/Ms/Dr.' (dropdown), 'First name', 'Last name', 'Attention of', 'Phone', 'Other phone', 'Fax', 'Address 1', 'Address 2', 'Cross. street', 'City', 'State/province', 'Zip/postal code', and 'Type' (radio buttons for 'Residential' and 'Commercial'). There are also buttons for 'New quotation', 'New work order', 'New invoice', 'View sites...', 'View jobs...', 'Callbacks...', and 'View callbacks...'. The 'OK' and 'Cancel' buttons are at the bottom right.

Dialog Box Controls

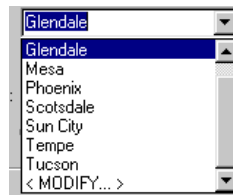
Fields

Fields are rectangles, which accept entry via the keyboard.



Drop-down list

Fields that can be fill with a value contained in the list that appears when clicking on the arrow button beside the field. Click a value from the list to select it. You can also type the first letter of the item in the list to select it.



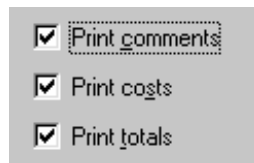
Radio button

Radio buttons allow you to select only one option from different possibilities. Click the button or the label to select an option.



Check box

Check boxes can select multiple options. Click the check box or the label to toggle the checkbox on or off.



Custom fields

Custom fields are like regular fields. The difference is that you can change its label. Refer to chapter3 to learn how to modify the label of a custom field.



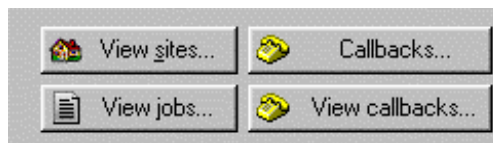
Text box

Text boxes are like regular fields but can contain a large quantity of text. Sometime, the text will be larger than the box itself. Use the scrolling arrow to view the rest of the text.



Buttons

Dialog box contains buttons like OK and Cancel. Pressing the button will not necessarily close the dialog box but execute a command like opening another dialog box on top of the one that contains the button.



The toolbars

Several toolbars can be found when using Mistral 2000. The toolbars are those chains of icons you see at the top or on the side of the windows. Each toolbar can be moved to either edge of the window, or to increase working space, move to the center of the screen, becoming a floating toolbar.

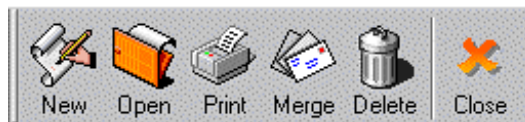
Layout

Appears when creating a quotation, work order or invoice. Located on the right side of the window. Contains tools to add pages, zoom in and zoom out the page, and preview the page before printing.



List

Appears when you open a list. Located on the left side of the window. Contains tools to create, open and delete an item. You will also find other tools like choosing, printing, merging items. This toolbar, in the Job List window also has tools to apply payment and void a job.



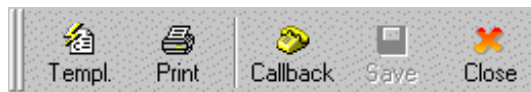
Job

Appears when creating a quotation, work order or invoice. Located at the top of the window. Contains tools to add information to the job (Customer, site, source, services, schedule, etc.)



Job II

Appears when creating a quotation, work order or invoice. Located on the left side of the window. Contains tools to change the template, print, create callbacks, save and close the job.



Job list

Appears when you open the Job List window. Located on the left of the list. Contains tools to select the type of job (quotation, work order, invoice, unpaid invoice). Contains also tools to print the jobs.



Schedule

Appears when you open the scheduler. Located on the top of the window. Contains tools to manage the blocks and the schedule.



Search Bar

Appears when you open a list. Located at the top of the list. Used to search for one or more items in a list.



Service description

Appears when you add a service in the job description. Contains tools to enter the description of your services in the job.



Template

Appears when you create a template. Located at the top of the window. Contains tools to build your template. Find tools to add different kinds of elements, view your template or change the properties of your elements.



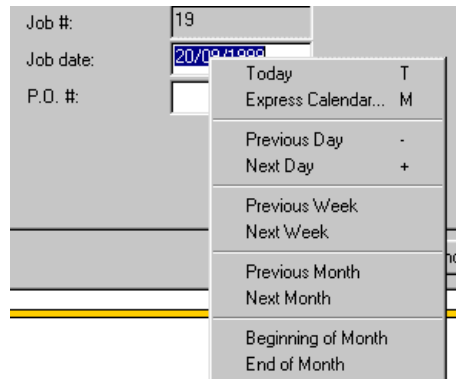
View Manager

Appears all the time in Mistral 2000. Located at the top of the window. List all the windows that are currently open in Mistral 2000. Used to switch from a window to another without closing it.



Shortcut menus

A shortcut menu is a menu of commands that is specific to an object. Many fields and object of Mistral 2000 have his own shortcut menu. The right mouse button is used to display a shortcut menu. To select an item in the menu, move the mouse over an item in the list and click (with the left button).



Date

Right click in a date field to view the *Date shortcut menu*. This menu contains different commands to help you to enter a date in the field. Here are the options:

- **Today:** Select to put today's date.
- **Express Calendar:** Select to view a small calendar. Click on the date to bring it in the date field.
- **Previous day:** Select to choose the day before the date written in the field.
- **Next day:** Select to choose the day after the date written in the field.
- **Previous week:** Select to move to the day one week before the date written in the field.
- **Next week:** Select to move to the day one week after the date written in the field.
- **Previous month:** Select to move to the day one month before the date written in the field.
- **Next month:** Select to move to the day one month after the date written in the field.
- **Beginning of the month:** Select to move to the first day of the month.
- **End of the month:** Select to move to the last day of the month.

List item

Right-click on a list item to view the *List item shortcut menu*. This menu contains different commands to modify the columns and the items of a list.

- **Font Size:** Select to change the font size of the list items.
- **Column configuration:** Select to change the columns of the list.
- **Show toolbar:** Select to hide or show the List toolbar.
- **Show Searchbar:** Select to hide or show the Searchbar toolbar.
- **Refresh List:** Select to refresh the list (after deleting items).

Text

Right-click on text field to view the *Text shortcut menu*. This menu contains commands to work with the text.

- **Undo:** Select to undo your last action.
- **Cut:** Select to cut the selected text (highlighted in blue) from the field.
- **Copy:** Select to copy the selected text (highlighted in blue) from the field.
- **Paste:** Select to paste the text (previously cut or copied from another field).
- **Delete:** Select to delete the selected text (highlighted in blue).
- **Select all:** Select to select all the text in the field.

Toolbar

Right-click on any toolbar to view the *Toolbar shortcut menu*. This menu contains commands to change the layout of the toolbar.

- **Small icon:** Select to view smaller icon (not always available).
- **Large icon:** Select to view the bigger icon.
- **View Text:** Select to view the text describing the icon.

View Manager

Right-click on the View manager toolbar (toolbar that shows the names of the currently opened windows) to view the *View Manager shortcut menu*. This menu contains command to change your Mistral 2000 window environment.

- **Cascade:** Select to place the opened windows in cascade.
- **Tile Horizontally:** Select to show all the opened windows in a horizontal position.
- **Tile Vertically:** Select to show all the opened windows in a vertical position.
- **Arrange Icon:** This command has no effect.
- **View manager:** Select to hide the View Manager.
- **Full Screen:** Select to view the active window in full screen.
- **Close All:** Select to close all the windows (except the Main Menu).
- **Windows:** Select to view a list of all the opened windows and to switch from a window to another one.

Special fields

Among all the fields that you will find in Mistral 2000, four of them are different and contain hidden commands.

Date

All the date fields that you find in Mistral 2000 have hidden commands that help you to save a lot of time when you enter the information.

Auto format: When you enter a date, enter one of these dates and Mistral 2000 will automatically change it in the regular date format. For instance, let's say that today is September the 20th 1999.

Entry	Mistral 2000 will change it to
21	09/21/1999
9	09/09/1999
0921	09/21/1999
092199	09/21/1999
010100	01/01/2000

Change date: Press the plus (+) or minus (-) key on your keyboard to change the date forward or back one day.

Phone

When you enter a phone number, enter one of this phone numbers and Mistral 2000 will automatically change it in the regular phone format.

Entry	Mistral 2000 will change it to
9256723	925-6723
8009256723	(800)925-6723
9256723 ext 24	925-6723 ext 24
8009256723 ext 24	(800)925-6723 ext 24
18009256723	1(800)925-6723
925-6723	925-6723
(800)925-6723	(800)925-6723

Numeric

Every Numeric field contains a hidden calculator. This calculator can perform basic calculation like the addition, the subtraction, the division and the multiplication. The calculator never appears on the screen. The calculations are made directly in the field. Follow these steps to learn how to use the calculator:

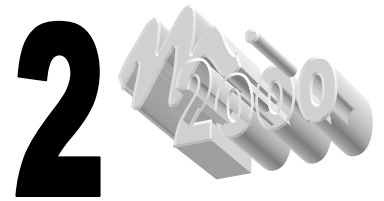
1. Move your cursor in a numeric field (a cost field, for instance).
2. Enter the first number (115, for example).
3. Enter the operator (*, for example). The operator doesn't appear in the field.
4. Enter the second number (145, for example).
5. Now, you can press the <TAB> key if you have finished or you can continue if you have another operation to do in this field

Zip codes

You can setup Mistral 2000 to generate the city and the state automatically when you type the zip codes. You will be able to use this command in the customer and the employee information window. Refer to the next chapter to learn how to setup your zip codes list.

CHAPTER 2

How to use Mistral 2000



User Logon

The first time you log onto the system, you will not have to use any user name. You will have to use user names only if you define them in the Mistral 2000 settings. Refer to the next chapter for more information on how to implement passwords and protect your system.

If you have defined users within Mistral 2000, then every time you run the program, you are asked to logon as a user. Mistral uses this information to manage the access of the user to individual functions within the system. Because each user's name and password is unique Mistral 2000 is able to block or give access to the user depending on the way this user was defined in the user setup.

Moving inside Mistral 2000

The main menu

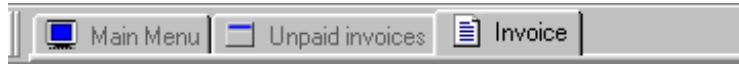
The Mistral 2000 main menu contains eight main function buttons: **Customers, Invoicing, Schedules, General Ledger, Reports, Other Lists, Setup** and **Exit**. A quick description of each function is as follows:

- **Customers** Used to add, change or remove customers in your list. Also used to maintain your callbacks.
- **Invoicing** Used to find, add, change or remove quotations, work orders or invoices.
- **Schedules** Used to setup and maintain your schedules.
- **General Ledger** Used to setup and maintain your chart of accounts and perform the data exportation to accounting software.
- **Reports** Used to generate management reports.
- **Other lists** Used to setup and maintain your lists of services, employees, sources and payments.
- **Setup** Used to setup the program defaults for your company.
- **Exit** Used to exit the program.

Each of these functions will be described in greater detail throughout the remaining chapters. When you click on one of these buttons (except for the Exit button) the program brings you a submenu with subfunctions that detail what you want to do exactly. Now, if you click on one of the subfunction, the main menu disappears behind the window of the function you called. The Main menu is a window that's always open, sitting behind all the other windows. A window will always stay open until you close it. Use the close function of a window to close any windows.

From one window to another

One of the nice things about Mistral 2000 is that you can open multiple windows, letting you do multiple functions at the same time. That allows you, for instance, to create two work orders and one invoice at the same time. Now, how to move out from a window without closing it? It's very simple; you just have to use the View Manager Bar.



This Toolbar is located at the top of each window of the program and contains the names of the windows that are currently open. You just have to click on the window's tab you wish to open. If you wish to open a new window, and start a new function, click on the Main Menu tab and start the new task. As you can see, the other windows are still available from the View Manager bar.

Using a list in Mistral 2000

After the Main Menu window, the type of window that you will often find in Mistral 2000 is the list. Mistral 2000 uses the list for almost everything.

The purpose of a list

Why do we use list? There are several reasons. First, it is very intuitive. Users can easily understand the lists. Also, it is a very powerful tool in Mistral 2000. You can sort it the way you want, you can search into it, you can print it, you can add, modify and remove columns very easily and finally, you can view it the way you want.

The items on a list

The only differences that we find in all the lists in Mistral 2000 are the items that they contain. A customer list contains customers' information and a service list contains services' information. Each line on your list is considered an item. An item will never take more or less than one line in your list.

Now, what are the columns in the list? The columns are the fields that define an item. For instance, you define your customers by their first names, last names, phone numbers, etc. Mistral 2000 uses those fields and creates columns in your list. Why some columns are in a different color? We just thought it would look better... that's it.

Adding an item to the list

Use this icon in all the lists to add an item to the list. When you click on it, a dialog box appears. Use this dialog box to enter the information about the item to add to the list. Click OK when finished. This new item will then appears in the list.



Opening an item on the list

Use this icon to view the detailed information on a highlighted item. You can also do some modification on the item from this window. Click OK to close the dialog box and return to the list.



Deleting an item from the list

Use this icon to remove a highlighted item from the list. Deleting an item equals to removing its data from your system. If you delete an item, you will not be able to access to its information again. Select the item to delete and click on the icon. Confirm your intention by clicking Yes. The deleted item will then appear in the list with the word "#deleted" for each one of its column. This confirms that the item is removed.





Click on this icon to refresh the list and remove the word “#deleted” from it.

Configuring your list

As we told you earlier, in Mistral 2000, you can customize your list the way you want. Here are all the operations you can do on a list.

The font size: You can change the size of the text used to show you the list. Here are the steps to change the font:

1. Right click on an item in the list.
2. Move your mouse over the Font Size option.
3. Click on the size you wish to use.

The columns size: Some information takes more space than other. The address for instance, will normally take more space than the zip code. If you want, you can modify the width of the column to make it fit with the information showed in the column. Here are the steps to modify the width:

1. Move your mouse over the black line separating two column's headers.
2. When the cursor looks like the icon on the left, press and hold the mouse button.
3. Move your mouse to the right to increase the width of the column or move your mouse to the left to decrease the width.
4. Release the mouse button.



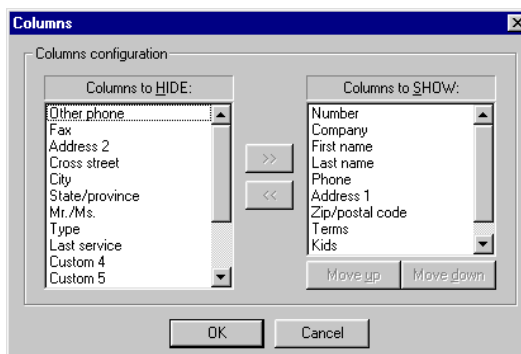
The column order: It is possible to change the order of the columns you find in your list. You may want to move the column that is on the far right completely on the far left. Here are the steps to change the columns' order:

1. Move your mouse over the header of the column you want to move.
2. Press and hold the mouse button.
3. Move your mouse (and the column header) to its new location.
4. Release the mouse button.



Change the information. Because of the size and resolution of your screen, it is sometime impossible to show all the information about an item. As default, Mistral shows the information (or the fields) that we believe are the most important for you. But, we are not always right and maybe there is a very important field that you want to see in the list and it does not showing now. Click on this icon located in the right upper corner of your list (Or right click on an item and chose *Column Configuration...*). The Columns window contains 2 lists. The column on the left contains the fields that are not in the list. Those fields are relevant to the item in the list but are not selected to show in the list. The list on the right contains fields that are showing in the list.

To add a column in the list:



1. Select the field in the list of columns to HIDE
2. Click on this icon to move the field in the other list

To remove a column from the list:

1. Select the field in the list of columns to SHOW
2. Click on this icon to move the field in the other list

You can also change the order of the column from this window. The information that is on the top of the list of columns to SHOW is the column that will be in the far left of your item list. So, the information that appears at the end of this list is the column that will appear at the far right of the item list.

To change the order of the columns, select the column to move and press on:

Move up to move the column to the left in your item list.

Move down to move the column to the right in your item list.

Sort the list. The item in the list always appears in an order. It could be in alphabetic, numeric or date order. You can easily sort the list the way you want. Here are the steps:

1. The list contains column Headers. You can sort the list by only one of columns that appear in the list at a time. If you wish to sort the list using information that does not appear in the list, you have to add this information (or this column) in the list before you can sort the list by this item.
2. Move you mouse over the header of the column you wish to use to sort the list (for instance, move you mouse over the word Last name if you wish to sort your customers' list by their last name).
3. Click on the header.
4. Click again on the header to sort the column in reverse order.

There are two ways you can sort the list. Ascending and descending.

This icon on the right of the header indicates that the list is sorted in an ascending way.



This icon on the right of the header indicates that the list is sorted in a descending way.



Moving inside a list

Your position in a list is indicated with a blue block (selection). There are two ways you can use to move your position (or selection) in the list. You can use the mouse or the keys of the keyboard.

How to move with the mouse:

To move up and down in the list



To move right or left in the list



Point and click on the item to select an item in the list

How to move with the keyboard:

- ↑ To move up in the list.
- ↓ To move down in the list.
- ← To move left in the list.
- To move right in the list.
- <Page up>** To move one page up in the list.
- <Page Down>** To move one page down in the list.
- <Home>** To move to the first item of the list.
- <End>** To move to the last item of the list.

Editing a field

If you want, you can easily modify an information that you see in the list without having to open the item definition dialog box. You just have to move your selection on the item and click on the information that needs to be updated. Note that it's not all the information that can be edited from the list. Press **ENTER** when finished.

Searching the list

This is one of the most handy and powerful tools in the lists. This tool allows you to search and find easily an item in your list. Mistral 2000 has two kinds of searches: Simple and advanced. The simple search allows you to find an item using only one criterion. The advanced search allows you to find one or more items using more than one criterion. The two kinds of searches are started from the Search bar located over the headers of the list.

The simple search needs maximum 3 or 4 entry depending on the operator you used. It needs an initial criteria (on which field we want to do the search), an operator (containing, =, between, etc.) and what we are looking for.

In this example, we want to look for all the customers that have the letter "L" in the last names:

A screenshot of a search bar interface. It consists of a dropdown menu with 'Last name' selected, followed by another dropdown menu with 'Containing' selected, and a text input field containing the letter 'L'. To the right of the input field is a magnifying glass icon, and further right are two buttons labeled 'Search' and 'All'.

The operator *Between* is a bit different from the other because it needs two information to look, as you need to define the range of information to look for. In this example, we are looking for all the customers that have their zip codes between 80000 and 82000:

A screenshot of a search bar interface. It consists of a dropdown menu with 'Zip/postal code' selected, followed by another dropdown menu with 'Between' selected, and two text input fields containing '80000' and '82000' separated by an ampersand '&'. To the right of the input fields is a magnifying glass icon, and further right are two buttons labeled 'Search' and 'All'.

Here are the steps to use the Simple search:

1. Choose a field from the field's list.
2. Choose an operator from the operator's list.
3. Enter the information to look for.
4. Click on the **Search** button.

Mistral 2000 will then show only the items that answers to the search query. To view the whole list again, click on the **All** button.

The advanced search works like the simple search but contains more than one search query. So it is possible for you to search an item using up to eight queries. In this example, we are looking for all the customers that live in Tempe **and** have a last name containing the letter "T".

The screenshot shows the 'Advanced Search' dialog box. It has a title bar with a close button. Inside, there are two main sections separated by an 'OR' label. The first section contains three rows of search criteria. The first row is 'City = tempe'. The second row is 'Last name Containing T'. The third row is empty. To the right of these rows is a vertical button labeled 'AND'. The second section is identical but empty. At the bottom are buttons for 'Clear', 'OK', and 'Cancel'.

You can also define queries like this one, where we are looking for all the customers that live in Tempe **or** in Mesa.

The screenshot shows the 'Advanced Search' dialog box. It has a title bar with a close button. Inside, there are two main sections separated by an 'OR' label. The first section contains three rows of search criteria. The first row is 'City = tempe'. The second row is empty. The third row is empty. To the right of these rows is a vertical button labeled 'AND'. The second section contains three rows of search criteria. The first row is 'City = Mesa'. The second row is empty. The third row is empty. To the right of these rows is a vertical button labeled 'AND'. At the bottom are buttons for 'Clear', 'OK', and 'Cancel'.

Here are the steps to use the Advanced search:

1. Choose <ADV. SEARCH> from the field's list.
2. Click on the **Configure Search...** button
3. Enter each query (using the simple search procedure)
4. Press **OK** when finished.

Mistral 2000 will then show only the items that match your search queries. To view the whole list again, click on the **All** button.

Print the list

Mistral 2000 offers you the ability of printing the lists contained in his database. This function is very interesting because not only you can print the information you want but also the way you want. The principle used by Mistral 2000 to print its list is very simple. It prints the list that you are currently viewing on your screen and in the way it is defined on your screen. In other words it print exactly what you are viewing. So, if you make a search and you are currently viewing the result of this search, you just have to press the printing icon to print this list.

How to print the list.

1. Define your list to view only the items and columns you want to print.
2. Click on the Print icon (the print preview then appears).
3. Change the columns and their orders and width.
4. Add a title to the list.
5. Choose the paper format.
6. Click on Print to print the list or Exp. to save as text file.

Number	Company	First name	Last name	Phone	Address 1	Zip/postal code	Taxes
		Jane	Fackin	(705) 421-3256	7655 Edwards	85005	
		Kim	Duglan	(705) 655-5844	5645 Drans	85205	
		Pargale	Phenco	(705) 654-7852	877 Milano	85010	
		Nagi	Phenk	(705) 654-4121	443 Alice	84756	
		Dolores	Julow	(705) 465-5487	6545 Englist	84754	
		Milve	Denis	(705) 655-7834	7655 Colami	85322	
		Sully	Lavent	(705) 412-4654	7866 Mc Neil	85101	
		Heather	Hull	(705) 566-6558	7877 York	85040	
		Dana	Leay	(705) 655-7095	676 Monahan	84755	
		Brenda	Leach	(705) 654-4544	7655 Long	84999	
		Angela	Libertella	(705) 644-4654	786 Hall	85264	
		Steve	Bratt	(705) 821-4568	4945 Wilmsd	85200	
		Don	Rusger	(705) 655-5555	6544 Davis	85111	
		Don	Remda	(705) 656-7793	2344 Cuthom	85321	
		Diana	Hall	(705) 654-2222	777 Bates	85236	
		Paula	Roberts	(705) 566-7852	1222 Lamsd	85124	
		Nancy	McIlmo	(705) 654-4735	654 Dum	85124	
		Paul	Rocco	(705) 654-9854	876 Michael	85543	
	Baron	Roy	Roy	(705) 654-7899	5437 Brunerwick	85365	
		Bar	Hamblin	(705) 823-4568	3345 Vian	85659	
	Crown Diamond	Fella	Fella	(705) 821-6547	344 Timley	85564	
		Denise	Wilk	(705) 466-6544	5687 Rosedale	84900	
		Robert	Mahan	(705) 465-3214	4536 Hamilton	85223	Net 15 days

How to Change column width ...

Some information takes more space than other. The address for instance, will normally take more space than the zip code. If you want, you can modify the width of the column to make it fit with the information showed in the column. Here are the steps to modify the width:

1. Move your mouse over the yellow dot separating two columns.
2. When the cursor changes to the icon shown on the left, press and hold the mouse button.
3. Move your mouse to the right to increase the width of the column or move your mouse to the left to decrease the width.
4. Release the mouse button.



Change the columns to print. Because of the size of the paper, it is sometime impossible to show all the information about an item. As default, Mistral prints the information or the fields that were selected in the list. Click on the Setup Columns button located in the left upper corner of your list print preview.

The Columns window contains 2 lists. The column on the left contains the fields that are not in the list. Those fields are relevant to the item in the list but are not selected to show in the list. The list on the right contains fields that are showing in the list.

To add a column in the list:

1. Select the field in the list of columns to HIDE.
2. Click on this icon to move the field into the other list.

To remove a column from the list:

1. Select the field in the list of columns to SHOW.
2. Click on this icon to move the field into the other list.

You can also change the order of the column from this window. The information that is on the top of the list of columns to SHOW is the column that will be in the far left of your item list. So, the information that appears at the end of this list is the column that will appear at the far right of the item list.

To change the order of the columns, select the column to move and press on:

Move up to move the column to the left in your item list.

Move down to move the column to the right in your item list.

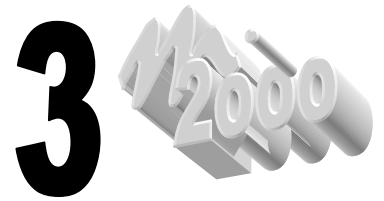
Add a title. Click in the *Description* field and type a title.

Change the paper format. Click on the Size icon and choose between the two formats (portrait or landscape).

Export the list. If you want, you can even save this list into a text format. That allows you to export the result to other software like a word processor (Microsoft Word) or an electronic datasheet (Microsoft Excel). When viewing the print preview, click on the icon Exp. To save the list into a text file. You can choose the folder where you want to save the file.

CHAPTER 3

Setting up Mistral 2000



Mistral 2000 general settings

System Security

The following paragraphs will discuss system security, the operator logon, passwords and how to add/change passwords.

Unrestricted access to the Mistral 2000 program could result in a total compromise in your company data integrity. For this reason, it is very important that you establish strict policies with regard to the use of passwords in this system, and enforce them. Some examples that should be included in all security policies are:

- Operators should not leave the workstation unattended without logging off.
- No one should ever be allowed to learn or use another operator's password.
- Operators should be removed from the system immediately upon termination.

Passwords

Passwords are the key to the system security. A new operator assigns his or her own password when they log on for the first time. In this way, password integrity is maintained. You do not need to keep a record of operator passwords.

Adding or changing a password is done at the Logon dialog box. When you add a new operator to the system, there is no defined password. When there is no password for an operator, the operator has to enter his user name and click on the **Modify...** button at the bottom of the Logon dialog box as soon as you enter the operator's name.

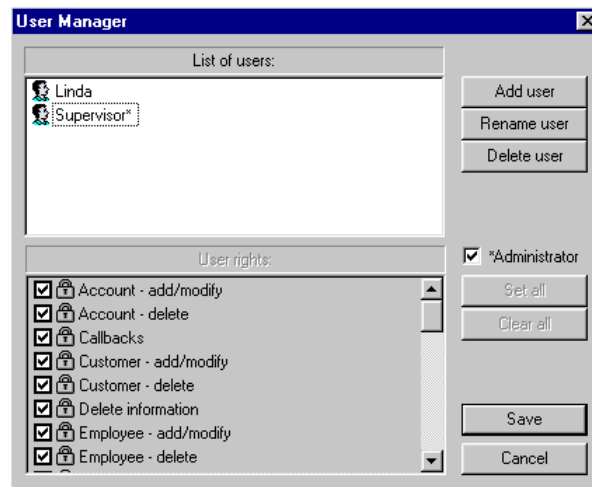
Here are the steps to enter the password

1. From the User Login window, type your User name.
2. Click on the Modify... button.
3. Type your password.
4. Type the password a second time to confirm.

Use the same steps to modify your password. The only difference is that you will have to enter your current password in the User Login window before clicking on the **Modify...** button.

User Name

The User names are used to define the users of the Mistral 2000. You do not need to define user names if you do not need to secure access to the program. The minute you will define a user name, Mistral will ask you a password in order to access the program. You will need to define at least one user as an administrator. This administrator is the only one who has access to all the functions of the program and also the only one who can change the list of user names.



Here are the steps to add User names in your system.

1. From the Main menu, click on the **Setup** button.
2. In the **Setup** submenu, click on **User Manager**.
3. Click on the Add user button.
4. Type the name of the new user and press ENTER.
5. If this user is the administrator, Check the Administrator check box.
6. If not, check the User's rights in the list below.
7. Click on **Save** when finished.

Note that it is very important to create at least one administrator. Use the same procedure to add all the users. From this window, you will also be able to delete and rename the users.

Software Settings

1. From the **Main menu**, click on the **Setup** button.
2. In the **Setup** submenu, click on **Settings**.

All settings are grouped together on six different pages within the dialog box. The General Info page is shown by default. Click another page tab to view other pages of settings. Here is a description of each page:

- General Info Your Company name and address.
- Location Defaults Tax information and your default area code and state.

- Zip codes Range of zip codes in your area. Helps you to write the city and the State information automatically when typing a zip code.
- Job defaults Miscellaneous settings involving the jobs printing.
- Callbacks Miscellaneous settings involving the callbacks.
- Advanced Used to define the next jobs numbers.

General Info

Use this setting to identify the software to your company. Write your company name in the Company name field and type your address in the address field. Mistral 2000 uses this information when printing reports and list.

The screenshot shows the 'Software Settings' dialog box with the 'General info' tab selected. The 'Company name' field contains 'CYCLEAN'. The 'Company address' field contains '1290 Main St, Springfield, AZ 85220, 705-787-4561'. There are 'OK' and 'Cancel' buttons at the bottom.

Location Defaults

These settings control if a tax is calculated and how it is calculated in the price of your jobs. When you click on the Location Defaults tab, the cursor automatically goes in the first tax rate field. Here are the steps to define the taxes:

Enter the first tax rate that applies in your area. If there is only one tax rate in your area, enter the tax rate in this field. Type the number and press **Tab** (for instance, type 6 and press TAB if the tax rate is 6%). You may also rename the tax names by clicking on the blue text "2nd tax:" and type a new name in the window.

Enter the second tax rate that applies in your area. Type zero (0) if there is no second tax in your area. Press TAB.

1. Type your first tax registration number, press **Tab**.
2. Type your second tax registration number (if there is one), press **Tab**.
3. Check only if the second tax is calculated over the first one.
4. Type your default state (Mistral 2000 will use this information to help you when entering the customers' information), press **Tab**.
5. Type your default area code.

The screenshot shows the 'Software Settings' dialog box with the 'Location defaults' tab selected. The 'Tax' field contains '6.000' and the 'Reg. #' field is empty. The '2nd tax' field contains '0.000%' and the 'Reg. #' field is empty. There is a checkbox labeled 'The second tax is applied over the first one' which is unchecked. Below this, there is a button labeled 'City tax rates...'. At the bottom, the 'State/province' field contains 'AZ' and the 'Area code' field contains '705'. There are 'OK' and 'Cancel' buttons at the bottom.

City tax rates

Use this function if you work in an area that has more than one tax rate. For instance, in you live close to a state or a province border, you will be able to setup different tax rates depending on the city and the state. Click on the **City tax rates** button to setup those taxes.

1. Click on the **New** button.
2. Type the city name, press **Tab**.
3. Type the first tax rate, press **Tab**.
4. Type the second tax rate, press **Tab**.
5. Click on the **Close** button or press <ENTER>.

To remove a value from the list

1. Click on the **City tax rates...** button.
2. Click on the value to remove.
3. Click on the **Remove** button.
4. Click on the **Close** button.

Zip codes

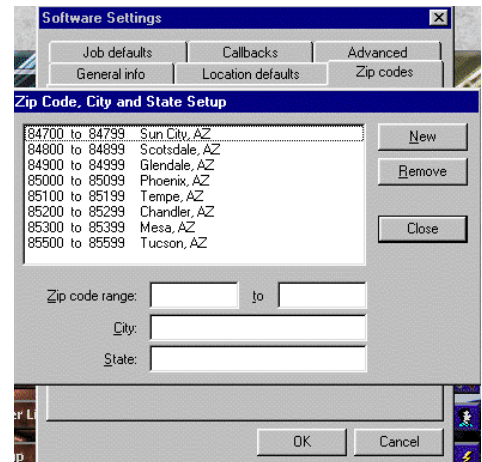
Mistral 2000 comes with a great new tool that will help you save a lot of time when entering new customers, sites or technicians. You just have to set up the zip code range with their respective city and state and next time you enter a zip code, Mistral will automatically give you the city and the state.

How to add a new entry in the zip code list

1. Click on the **Zip codes range...** button.
2. Click on the **New** button.
3. Type the first zip code of the range, press **Tab**.
4. Type the second zip code of the range, press **Tab**.
5. Type the city corresponding to this zip code range, press **Tab**.
6. Type the state corresponding to this zip code range.
7. Click on the **Close** button or press <ENTER>.

To remove a value from the list

1. Click on the **Zip codes range...** tab.
2. Click on the value to remove.
3. Click on the **Remove** button.
4. Click on the **Close** button.



Job Defaults

These settings control the editing and the printing of your jobs. Here's how to use those settings:

- **Print comments** Check only if you want Mistral to print the default comment (Located in the white rectangle bellow).

- **Print costs on work orders** Check if you want Mistral to print the cost for each service on the work orders.
- **Print Total** Check if you want Mistral to print the job total price on the work orders.
- **Default comment** Type the comment you want to print on each type of job. This comment prints only if you check the Print comments check box above and if you setup your templates with the comment fields.
- **Start in service code field** Check if you are using codes to define your services. If checked, Mistral will bring your cursor directly in the code field when entering new services in your jobs.

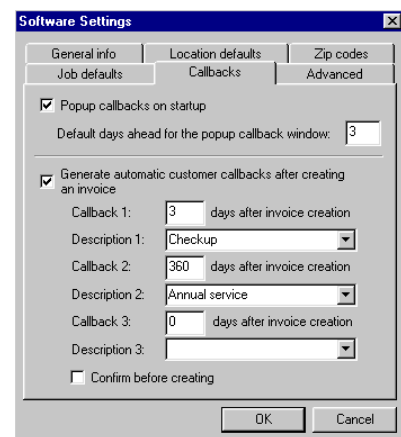


Callbacks

The Callback feature has been completely changed in this new version of Mistral. It is now more powerful and a lot easier to use. There are two ways you can generate a Callback. You can set one up manually from the Customer submenu or/and ask Mistral to auto-generate them for you. You can also ask Mistral to show you the list of all the customers to call back when you enter in the program.

Here is how to use the Call back settings:

- **Popup Callback on startup** Check if you want Mistral to show the list of the customers you have to call.
- **Default days ahead...** Enter the number days ahead for the Callback list. For instance, if you type "7", the Callback list will show you the list of all the customers you have to call for today and for the next week (7 days).
- **Generate automatic...** Check if you want Mistral to create an automatic callback when you create and save an invoice. You can setup up to 3 callbacks for that customer.



Why have an automatic callback? It is a way for you to show that you care for your customer and also it is a great tool to help you bring back this customer later. You can setup a first callback after a week, for instance, and verify with him if he is satisfied of your services. You can setup another callback 6 months or a year later to check if he needs you services again.

How to setup the automatic callbacks:

1. Check the *Generate automatic customer callbacks after creating an invoice* check box.
2. Type the number of days following the creation of the invoice that you believe would be a good time to call that customer for the first time. Press **Tab**.
3. Enter a description for that callback (ex. Satisfaction callback). Press **Tab**.
4. Use the same procedure for Callbacks 2 and 3.
5. Check the *Confirm before creating* if you want Mistral to confirm the creation of the callbacks every time you save an invoice.
6. Click **OK** when finished.

Advanced

These settings allow you to setup the next jobs number. You will be able to set up the numbers for your quotation, work orders and invoices. Why? Let say that you decide to implement Mistral 2000 and that you are already in business for several years, you would probably want to continue with the same job numbers as before you had this program. Here is how to modify the numbers:

1. Click on the Modify buttons next to the number you want to change.
2. Click in the field where the number appears.
3. Delete and type the new number.
4. Use the same procedure to modify the other numbers.
5. Click **OK** when finished.

Note that the number you enter will be the next number use for the job. Be careful not to change these numbers more than once. You may end up with errors because of duplicate numbering.

Setting up your General Ledger

The purpose of the General Ledger module is to facilitate the achievement of your accounts. We believe that there is a lot of accounting software presently on the market, and lots of them are very good. We also believe that probably your accountant already uses one of those software packages, so why should he use another one? We created the General Ledger section to "join" this system with the accounting software of your choice.

You can also use the Ledger, even if you are not using any other accounting software. Mistral 2000 can generate accounting reports from the information of the Ledger. If you have a small business and you think you don't need an accounting software package, you can use the accounting features of Mistral to help you make your accounting.

Unfortunately, it is impossible for us to give you an accounting lesson. On the other hand, we will show you how set up and use the General Ledger of Mistral 2000. Ask your accountant if you need more information about your Chart of Accounts.

Chart of accounts

The chart of accounts is the foundation of all your accounting. You will use it to follow all the transactions made within your company.

Number	Name	Type
1000	Checking	Asset
1100	Visa	Asset
1200	Master Card	Asset
1300	Amex	Asset
1400	Discovery	Asset
1050	Account Receivables	Asset
2000	Tax payable	Liability
4100	Residential - Carpet cleaning	Income
4150	Residential - Upholstery Cleaning	Income
4200	Commercial - Carpet Cleaning	Income
4250	Commercial - Upholstery Cleaning	Income
4300	Residential - Protector	Income
4350	Commercial - Protector	Income
4400	Accessories	Income
4450	Water Extraction	Income
4500	Area rugs cleaning	Income
4800	Discount	Income
4900	Other Sales	Income
1500	Other payments	Asset

Viewing your chart of accounts

1. In the Main menu, click on **General Ledger**.
2. In the General Ledger menu, click on **Account List**.

This window shows your chart of accounts. Every line in the list is a different account. If the word **All accounts** is selected (in the Chart Tree on the left of your screen), it means that the list is showing all your accounts in the right hand window. To view a subdivision of your chart, click on the + beside **All accounts** and then choose one of the Account Header. To view all the accounts again, just click on **All accounts**.

To create a new account header

The account header is used to divide your chart in sections. You can use those sections to create reports.

1. In the chart tree, right-click on the word **All accounts**.
2. Move your mouse over **New** and click.
3. Type the new account header and click **OK**.

To modify an account header

1. In the chart tree, right-click on the account header to modify.
2. Move your mouse over **Rename** and click.
3. Type the new name and click **OK**.

To delete an account header

Find the account header to delete and click on the **Delete** button. Click **Yes**.

This operation will not delete the accounts under the account header.

To create a new account

1. In the Chart of Accounts, click on the **New** button.
2. Type the account number, press **Tab**. "These are mandatory even if you don't use them in your accounting package"
3. Type the account name, press **Tab**.
4. Choose a type from the drop down list, click and press **Tab**.
5. Enter the opening balance.
6. Click **OK**.

To modify an account

1. Find the account to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

To delete an account

1. Find the account to delete and click on the **Delete** button.
2. Click **Yes**.

To search for an account

Use the search section of the window

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.

The list will show all the accounts that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button.

Refer to chapter 2 to learn how to modify the look of your chart and how to use the advance search.

Setting up your Services

Mistral 2000 is designed to help you with your day-to-day work. One of the main features of the program is the invoicing. When you create a new work order or a new invoice, you need to enter the description of the work. This description consists, in part, of lines of services. This section will show you how to create your own services with your costs.

What is in a service?

A service contains the following information:

- **Category**. The category is used to subdivide your list. That way, it is easier for you to search for a service when creating a new job. You can choose to print or not this information on the invoice. The category is also used in the sales reports.
- **Name**. The name is used to describe the service.
- **Code**. The code is used as a shortcut to enter the service rapidly when you are creating a job.

- **Unit of measure.** The unit of measure is used to describe the cost. That way, your customer will know what unit you used to calculate the price of your service. You can choose to print or not this information on the invoice.
- **Account number.** The account number is used to link the service to one of your income account. This number is required if you want to use Mistral 2000 with an accounting program or if you wish to generate accounting reports in Mistral.
- **Costs.** You can define up to 5 costs per services. That way, you can define different prices depending on your customer.

Service	Unit	Cost 1	Cost 2	Cost 3	Cost 4	Cost 5
Anti-Microbial	Sq Ft.	\$45.00	\$35.00	\$0.00	\$0.00	\$0.00
Anti-Stats	Sq Ft.	\$15.00	\$1.00	\$0.00	\$0.00	\$0.00
Cleaning, extraction	Sq Ft.	\$0.30	\$0.25	\$0.00	\$0.00	\$0.00
Deodorization	Sq Ft.	\$0.10	\$0.80	\$0.00	\$0.00	\$0.00
Protector	Sq Ft.	\$0.15	\$0.12	\$0.00	\$0.00	\$0.00
Water Extraction	Sq Ft.	\$0.35	\$0.25	\$0.00	\$0.00	\$0.00
Cleaning, Extraction	Unit	\$10.00	\$8.00	\$0.00	\$0.00	\$0.00
Dry Cleaning	Unit	\$15.00	\$12.00	\$0.00	\$0.00	\$0.00
Leather Cleaning	Unit	\$15.00	\$12.00	\$0.00	\$0.00	\$0.00
Protector	Unit	\$5.00	\$3.00	\$0.00	\$0.00	\$0.00
Anti-Microbial	Sq Ft.	\$45.00	\$35.00	\$0.00	\$0.00	\$0.00
Anti-Stats	Sq Ft.	\$15.00	\$1.00	\$0.00	\$0.00	\$0.00
Cleaning, extraction	Sq Ft.	\$0.30	\$0.25	\$0.00	\$0.00	\$0.00
Deodorization	Sq Ft.	\$0.10	\$0.80	\$0.00	\$0.00	\$0.00
Protector	Sq Ft.	\$0.15	\$0.12	\$0.00	\$0.00	\$0.00
Water Extraction	Sq Ft.	\$0.35	\$0.25	\$0.00	\$0.00	\$0.00
Anti-Microbial	Sq Ft.	\$45.00	\$35.00	\$0.00	\$0.00	\$0.00
Anti-Stats	Sq Ft.	\$15.00	\$1.00	\$0.00	\$0.00	\$0.00
Cleaning, extraction	Sq Ft.	\$0.30	\$0.25	\$0.00	\$0.00	\$0.00

Viewing your list of services

1. In the Main menu, click on **Other Lists**.
2. In the Other Lists menu, click on **Service List**.

This window shows your list of services. Every line in the list is a different service. If the word **All services** is selected (in the services tree on the left of your screen), it means that the list is showing all your services. To view a subdivision of your list, click on the + beside **All services** and then choose one of the category. To view all the services again, just click on **All services**.

To create a new category

The category is used to divide your list of services.

1. In the service tree, right-click on the word **All services**.
2. Move your mouse over **New** and click.
3. Type the new category (ex. Carpet residential) and click **OK**.

To modify a category

1. In the service tree, right-click on the category to modify.
2. Move your mouse over **Rename** and click.
3. Type the new name and click **OK**.

To delete a category

1. Find the account header to delete and click on the **Delete** button.
2. Click **Yes**.

This operation will delete all the services included in this category.

To create a new service

1. In the list of services, click on the **New** button.
2. Type the name, press **Tab**.
3. Type the code (optional), press **Tab**.
4. Choose a unit of measure from the drop down list, click and press **Tab**.
5. Choose an account from the drop down list, click and press **Tab**.
6. Enter the cost(s).
7. Check the tax(es) if you charge tax on this service.
8. Enter extra information (custom fields).
9. When finished, click **OK**.

To modify a service

1. Find the service to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

To delete a service

1. Find the service to delete and click on the **Delete** button.
2. Click **Yes**.

To search for a service

Use the search section of the window

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.

The list will show all the services that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button.

To move services from one category to another

1. Click on the service to move and hold down the mouse button.
2. Drag the service over the category where you want to move it.
3. Release the mouse button.

To copy services from one category to another

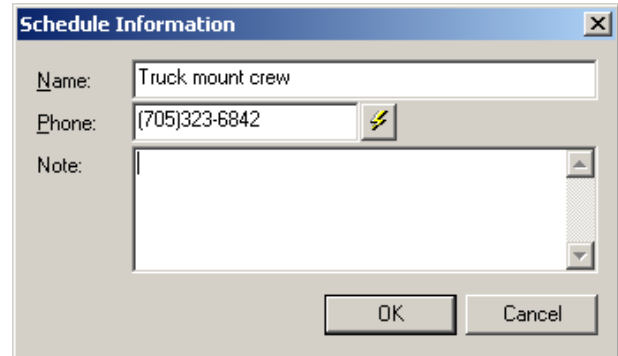
1. Click on the category you want to copy the services from.
2. In the windows menu, click on Copy/Paste and choose Copy services.
3. Click on the category you want to copy the services to.
4. In the windows menu, click on Copy/Paste and choose Paste services.

Setting up your Schedules

With Mistral 2000 you will be able to schedule all your jobs. But, to be able to schedule the jobs, you need to create the schedules. If you have a small company and only have one crew on the road, you will probably create one schedule. But, on the other hand, if you have a big company and multiple trucks and crews, you will probably create many schedules. Most of the time, you will assign a schedule to one of your technicians or trucks.

To create a new schedule

1. In the Main menu, click on **Schedules**.
2. In the Schedule menu, click on **Schedule List**.
3. In the list of schedules, click on the **New** button.
4. Type the name, press **Tab**.
5. Type the phone number (optional), press **Tab**.
6. Type a note (optional).
7. When finished, click **OK**.



The screenshot shows a 'Schedule Information' dialog box with a blue title bar and a close button (X) in the top right corner. It contains three input fields: 'Name:' with the text 'Truck mount crew', 'Phone:' with the text '(705)323-6842' and a lightning bolt icon to its right, and 'Note:' with an empty text area. At the bottom right, there are two buttons: 'OK' and 'Cancel'.

To modify or add information to schedule

1. Find the schedule to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

To delete a schedule

1. Find the schedule to delete and click on the **Delete** button.
2. Click **Yes**.
3. Deleting a schedule will un-schedule any related job. If you have jobs linked to that particular schedule, try renaming the schedule instead.

To search for a schedule

Use the search section of the window

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.

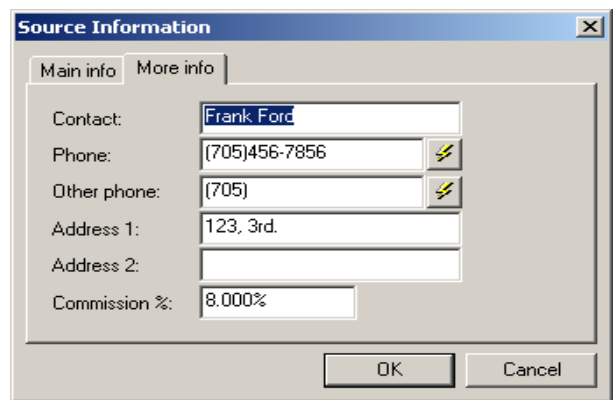
The list will show all the schedules that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button.

Setting up your Sources

One of the advantages of using a computer program to manage your business is that it can compile information rapidly that would take days for us to do manually. Tracking your sources, for instance, is probably a very useful tool for your business. Within a few clicks of your mouse, you can find out how much each source has brought you in revenue. Enter here all the possible sources of business (Yellow Pages, Web site, newspaper, etc.). Now, with this new version, you can now enter more information on the source. This way, you will be able to enter a company as your source (dry cleaner for instance) and calculate a commission using a report.

To create a new source

1. In the Main menu, click on **Other Lists**.
2. In the Other List menu, click on **Source List**.
3. In the list of schedules, click on the **New** button.
4. Type the name, press **Tab**.
5. If this source is a company, click on the **More info** tab.
6. Type the contact, press **Tab**.
7. Type the phone number, press **Tab**.
8. Type the other phone number, press **Tab**.
9. Type the address 1, press **Tab**.
10. Type the address 2, press **Tab**.
11. Type a commission.
12. When finished, click **OK**.



To modify a source

1. Find the source to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

To delete a source

1. Find the source to delete and click on the **Delete** button.
2. Click **Yes**.

To search for a source

Use the search section of the window

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.

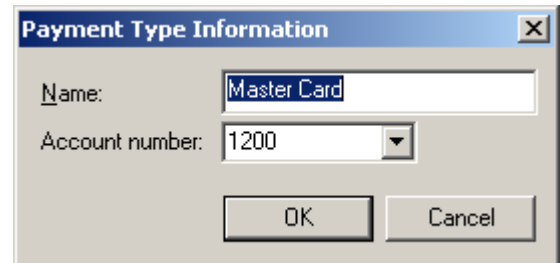
The list will show all the sources that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button.

Setting up your Payments

The payments are the methods that your customers use to pay their invoices. Enter all the payment types that your company accepts (Master Card, Visa, Amex, etc.). You can also assign a type of payment to one of your account number. So every time you receive a payment, that account will be debited of the amount received. You can assign more than one type of payment to one account if you want.

To create a new type

1. In the Main menu, click on **Other Lists**.
2. In the Other List menu, click on **Payment Type List**.
3. In the list of payments, click on the **New** button.
4. Type the name, press **Tab**.
5. Type the account number or select it from the drop-down list (optional).
6. When finished, click **OK**.



To modify a type of payment

1. Find the type to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

To delete a payment

1. Find the type to delete and click on the **Delete** button.
2. Click **Yes**.

To search for a type

Use the search section of the window

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.

The list will show all the types that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button.

Setting up your Employees

Here are the procedures to set up your employees in Mistral 2000. The main reason why you need to enter that information is to know which employee of your company is involved in each job. You need to set up that list also if you give commission to your technicians or sales person. Refer to chapter 5 to learn more about the Employee List.

To create a new employee

1. In the list of employees, click on the **New** button.
2. Type the employee number (optional), press **Tab**.
3. Type the first name, press **Tab**.
4. Type the last name, press **Tab**.
5. In the drop-down list, choose a type, click and press **Tab**.
6. Type a note.
7. Use the next section if you give commission to this employee.
8. Enter the commission this employee makes on sales before add-ons, press **Tab**.
9. Enter the commission this employee makes on add-on sales, press **Tab**.
10. Enter a fixed commission that this employee have on each job, press **Tab**.
11. Enter his wage per hour, press **Tab**.

Employee "More info" window.

1. Click on the **More info** tab.
2. Type the phone number, press **Tab**.
3. Type the other phone number, press **Tab**.
4. Type the address 1, press **Tab**.
5. Type the address 2, press **Tab**.
6. Type the address 1, press **Tab**.
7. Type the city, press **Tab**.
8. Type the state, press **Tab**.
9. Type the Zip code, press **Tab**.
10. Type the social security number, press **Tab**.
11. Enter extra information in the custom fields.
12. When finished, click **OK**.

Setting up your Customers

This procedure consists in entering all the information about your customer. In Mistral 2000, all your customers are listed in a window we call List of Customers. From that window, you will be able to add a new customer, make modification into a customer folder or delete one. Right now, we will only show you how to create a new customer. Refer to chapter 4 to learn more about the Customer List.

Creating a new customer

1. In the list of customers, click on the **New** button.
2. Type the customer number (optional), press **Tab**.
3. Type the company name (if it's a commercial customer), press **Tab**.
4. In the drop-down list, choose a salutation, click and press **Tab**.
5. Type the first name, press **Tab**.
6. Type the last name, press **Tab**.
7. Type the attention of (if it's a commercial customer), press **Tab**.
8. Type the phone number, press **Tab**.
9. Type the other phone number, press **Tab**.
10. Type the fax number, press **Tab**.
11. Type the address 1, press **Tab**.
12. Type the address 2, press **Tab**.
13. Type the cross street, press **Tab**.
14. Type the city, press **Tab**.
15. Type the state, press **Tab**.
16. Type the Zip code, press **Tab**.
17. Choose a type, click and press **Tab**.

Refer to the chapter 4 to learn more about the customers.

Other set up Options

Setting up your custom fields

The custom fields are extra information that you can add to help you describe a customer, a service or an employee for instance. The custom fields can be recognized by their blue color. The nice thing about them is that you can rename them and personalized, at the same time, your copy of Mistral 2000. Once you rename a custom field, it will modify its value of all the custom fields. For example: If you rename **Custom field 6** to **Email** in the Customer Information window, All the **Custom field 6** of all the customers will be named **Email**.

We find two types of custom fields: regular and drop-down list.

To change a custom field name

1. Double-click on the word "**Custom field**" highlighted in **Blue**
2. Type the name you want to give to that new field
3. Click **OK**.

Do exactly the same if you want to modify the name of other custom fields.

A regular custom field

Use the regular custom field to enter general information. They can take alphabetic or numeric information.



The drop-down list field

This field works like a regular drop-down list. Use this kind of custom field to enter information that have limited values. To enter an information, you have to select it from the drop-down list appearing when you click on the **arrow**. Look at the next section to learn how to set the values in the Drop-down list.



Setting up your Drop-down list

The drop-down list fields can be found in most of the windows of Mistral 2000. The advantage of having this kind of field is that it is easier and faster for the user to enter information in the field. Some of the list already contains values but some lists are empty and you have to set the values. Here are the steps you have to follow to set values in the list.

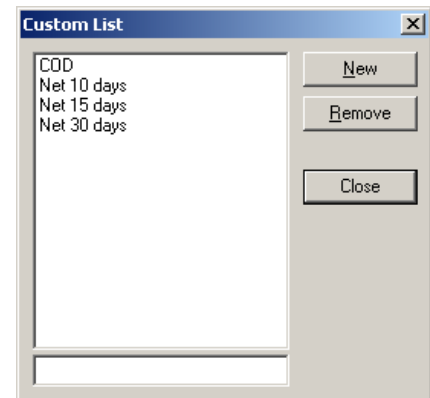
1. Click on the **arrow**.
2. Select <MODIFY> and click.

The window Custom List appears.

To add a value in the Custom List

1. Click on the **New** button.
2. Type the new value.
3. Click on the **Close** button or press <ENTER>.

This new value will be added to your list and will appear in the field.

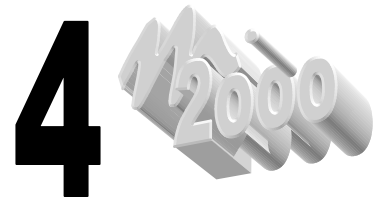


To remove a value from the list

1. Click on the value to remove.
2. Click on the **Remove** button.
3. Click on the **Close** button.

CHAPTER 4

Customer



What is a customer?

For your business, the customer is your source of revenue. Without the customers and their needs for your services, you would not have a business at all. We are very conscious of this reality and we provide, a wide range of tools to help you take good care of your customers.

Customer information you can enter

Mistral 2000 can take more than the name, address and phone numbers. You can store a lot of information on a customer. The more information you have, the better you will be equipped to serve and keep each customer. Here's a list of all the information you will be able to keep for each one of your customers:

- Name, salutation and address.
- Crossing street.
- 3 phone numbers.
- Type (residential or commercial).
- Initial source (where this customer comes from).
- Name of the person who refers that customer.
- Last service date.
- Default pricing and discounts.
- 10 custom fields (that you define the way you want).
- A note section (invisible to the customer).
- Payments, credits and refunds information.
- Complete and detailed history on passed invoices.
- List of sites (if this customer has more than one site).
- Callback information.

The Customer list

The Customer list is the tool we use to enter most of the information on customers. This list allows you to view, add, modify, search, delete and print customers' information. In this section, we will show you how to perform all those tasks.

Adding a customer in your list

This procedure consists in entering all the information about your customer



1. In the list of customers, click on the **New** button.
2. Type the customer number (optional), press **Tab**.
3. Type the company name (if it's a commercial customer), press **Tab**.
4. In the drop-down list, choose a salutation, click and press **Tab**.
5. Type the first name, press **Tab**.
6. Type the last name, press **Tab**.
7. Type the attention of (if it's a commercial customer), press **Tab**.
8. Type the phone number, press **Tab**.
9. Type the other phone number, press **Tab**.

10. Type the fax number, press **Tab**.
11. Type the address 1, press **Tab**.
12. Type the address 2, press **Tab**.
13. Type the cross street, press **Tab**.
14. Type the city, press **Tab**.
15. Type the state, press **Tab**.
16. Type the Zip code, press **Tab**.
17. Choose a type, click and press **Tab**.

To add more information, click on the More info tab.

1. Choose an initial source from the Initial source list, press **Tab**.
1. If this initial source is another customer, select it from this list, press **Tab**.
2. If that customer used your service before, enter the last service date; press **Tab**. (this date will be updated each time this customer uses your services).
3. Select a price number. (your service can have up to 5 different costs. Choose the one that applies to this customer). Press **Tab**.
4. Enter a default rebate (in %) for this customer (if any), press **Tab**.
5. Enter a default rebate (an amount) for this customer (if any), press **Tab**.
6. Enter information in your custom field. Refer to the previous chapter to learn how to set up your custom fields.
7. Type a note.
8. Press **OK** when finished.

Modifying the customer information



1. From the customers' list
2. Find the customer to modify and click on the **Open** button.
3. Make the modification.
4. When finished, click **OK**.

Deleting a customer

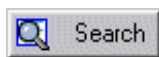


1. From the customers' list
2. Find the customer to delete and click on the **Delete** button.
3. Click **Yes**.

Note that you will not be able to delete a customer if he is assign to a job (quotation, work order or unpaid invoice)

Searching for a customer

Use the search section of the window



1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.
5. The list will show all the customers that correspond to the search query that you defined. To view the complete list again, click on the **All** button. To learn more about the search, refer to chapter 2.

Creating multiple sites for a customer

Mistral 2000 allows you to enter more than one address for a customer. Why? Very simple. You probably have one or more commercial customers that own more than one building. For those customers, you always charge to the main office but you perform the service at a different address. Mistral 2000 has all the tools to keep this information. Here is how to enter different sites address for one customer.

1. Find the customer in the customer's list.
2. Click on the **View sites...** button. The list of sites appears.
3. Click on the New button to add a new site.
4. Type the company name (if it's a commercial site), press **Tab**.
5. Type the first name, press **Tab**.
6. Type the last name, press **Tab**.
7. Type the attention of (if it's a commercial customer), press **Tab**.
8. Type the phone number, press **Tab**.
9. Type the other phone number, press **Tab**.
10. Type the fax number, press **Tab**.
11. Type the address 1, press **Tab**.
12. Type the address 2, press **Tab**.
13. Type the cross street, press **Tab**.
14. Type the city, press **Tab**.
15. Type the state, press **Tab**.
16. Type the Zip code, press **Tab**.

To add more information, click on the More info tab.

1. Enter information in your custom field. Refer to the previous chapter to learn how to set up your custom fields.
2. Type a note.
3. Press **OK** when finished.

The new site will be added to the list of sites. Note that this list of sites is unique to this customer. Use the other function to open, modify, delete or print the sites.

Creating new jobs

There are two ways for you to create new jobs. You can create them from the Main Menu (Invoicing) or directly from the customer information window. The advantage of creating the job from the customer window is that the information about the customer will already be entered in the job. To create a new job (quotation, work order or invoice) from the customer window, simply click on the button corresponding to the type of job you want to create.

Viewing jobs

This very useful function allows you to view all the jobs (current and old) you did for a customer. To view those jobs, you just have click on the **View jobs...** button located in the customer information window. When you click on this button, the list of all the current jobs (quotation, work orders and unpaid invoices) appears as well as the list of all the history (paid invoices). If you select a job and press on the Open button, you will be able to view all the details on this job. Refer to the chapter 6 to learn more about the list of jobs and all its possibilities.

Using the Customer Callbacks

What is a callback?

A callback is a little reminder that you set up to make you remember the calls you have to do. In another word it is a To Do list of customers to call or send reminders to. The callbacks' list pops up every time you open Mistral 2000, that way; you have no reason to forget the customers you need to call. Here is the information you have to enter when you create a new callback.

- Customer name Customer name
- Date Date you have to call this customer
- Description Why you have to call him
- Called Yes if you made the call and No if you did not.

Mistral 2000 has two types of callbacks: Automatic and Manual. The automatic callbacks are automatically generated when you create an invoice. The manual callbacks have to be entered manually by the user. Refer to the previous chapter to learn how to set up your automatic callbacks.

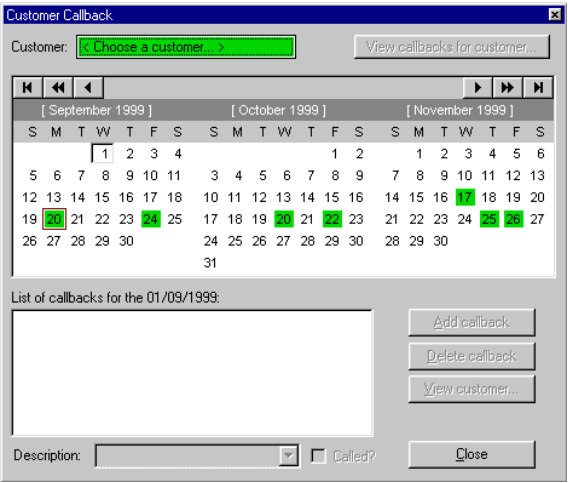
Creating a new callback

There is 3 ways for you to create a callback: From the Main Menu, from the Customer information window and from a job. All those ways use the same kind of dialog box.

Here are the steps to enter a new callback:

1. Choose a customer from the customers' list.
2. Select a date where you will set up the call.
3. Click on **Add Callback**.
4. Enter a description (the reason why you need to call this customer at this date).
5. Click **OK**.

You are also able to perform other tasks from this window. You are able to view all the calls set up for this customer, view the Customer information window, view and print the callbacks for this customer, delete a callback, view the other callbacks (for the other customers) and set a callback as called.



Printing the list of callbacks

The callbacks' list is like all the other lists. This means that you can print the information displayed in the Pop up callback list. Just click on the Print button to print the information. Refer to the Chapter 2 to learn more about the options available for printing a list.

Print the customers' list

There may be several reasons for you to print your customers' list. Whatever they are, you can count on Mistral 2000 to help you achieve this task. Choose the information to print, select only the customers and the columns you want. You can find the procedure on how to print the customers' list in the chapter 2 because printing the customers' list is like printing all the other lists of Mistral 2000.

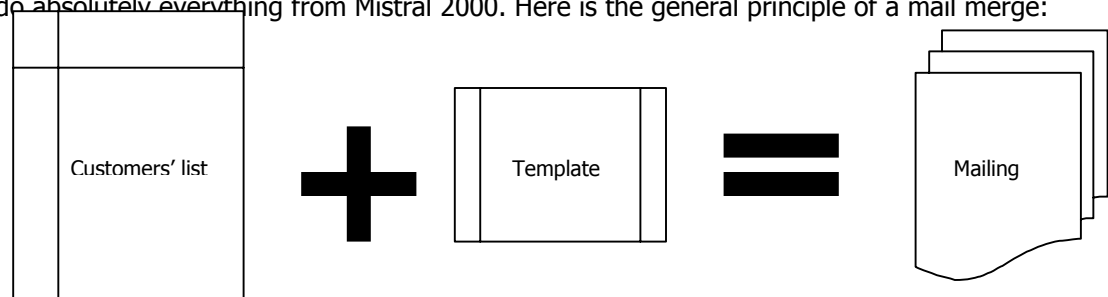
Note that printing the list is different from printing a mailing list, labels or personalized letters. The next section will show you how to perform those tasks.

Creating a Mail Merge from the customers list

What is a Mail Merge?

The mail merge is a new and wonderful tool that's been added to Mistral 2000. The mail merge allows you to create all kinds of mailing labels, personalized letters, envelopes and postcards, etc. The mail merge is a great tool to make you save a lot of time and money and also to improve your image.

The Mistral 2000 mail merge is so good that you do not need to use any other program. You can do ~~absolutely everything~~ from Mistral 2000. Here is the general principle of a mail merge:



You need two entities to create a mail merge. A list of information (customers' list in this case) and a template (label, envelop, letter, etc.). The template contains fields that will be replaced by the customer information when we will merge the two entities together. A mail merge will create as many mailing items as there are items in the list of information. For instance, if you have 100 customers in your list and you decide to merge this list with a label template, the results will be 100 personalized labels. So, the list + the template = to the mailing.

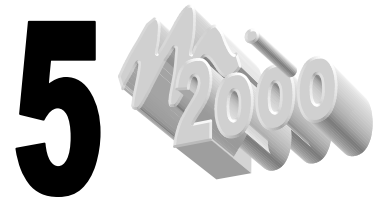
When you will press on the Merge button in your customers' list, Mistral 2000 is going to use the list that you are currently viewing to create the mail merge. So, if you are currently viewing the list of all your customers, Mistral is going to create the mailing for all your customers. If you want to create a mail merge for only a part of your customers' list, you need to view only those customers. Use the Search function to create a partial list.

You will also have to create mailing templates if you have not defined any. Refer to chapter 10 to learn how to create the templates.

Finally, if you need to create more complex mail merge, you can use the Mail merge function located in the Reports submenu. Refer to chapter 8 to learn how to create complex mail merge.

CHAPTER 5

Employee



What is an employee?

Like we told you in the previous chapter, the more you know the better it is. Being able to know all the employees that are involved in a job is a plus for your company. When we say employee, we mean everybody, from the person who takes the call to the person who performs the jobs.

The information you can enter

Mistral 2000 can take more than the name, address and phone numbers. You can store a lot of information on an employee. The more information you, the better you will be manage your employees. Here's a list of all the information you will be able to keep for each one of your employees:

- Name and address.
- 2 phone numbers.
- Type (sales, technician, telemarketing, etc.).
- Social security number.
- 3 custom fields (that you define the way you want).
- A note section (invisible to the customer).
- Commission information.

The employee list

The employees' list is the tool we use to enter most of the information on employees. This list allows you to view, add, modify, search, delete and print employees' information. In this section, we will show you how to perform all those tasks

Creating a new employee

This procedure consists in entering all the information about your employee.



1. In the list of employees, click on the **New** button.
2. Type the employee number (optional), press **Tab**.
3. Type the first name, press **Tab**.
4. Type the last name, press **Tab**.
5. In the drop-down list, choose a type, click and press **Tab**.
6. Type a note.
7. Use the next section if you give commission to this employee
8. Enter the commission this employee makes on sales before add-ons, press **Tab**.
9. Enter the commission this employee makes on add-on sales, press **Tab**.
10. Enter a fixed commission that this employee have on each job, press **Tab**.
11. Enter his wage per hour, press **Tab**.

Use the next window if you need to enter more information on this employee

1. Click on the **More info** tab
2. Type the phone number, press **Tab**.
3. Type the other phone number, press **Tab**.
4. Type the address 1, press **Tab**.
5. Type the address 2, press **Tab**.
6. Type the address 1, press **Tab**.
7. Type the city, press **Tab**.
8. Type the state, press **Tab**.
9. Type the Zip code, press **Tab**.
10. Type the social security number, press **Tab**.
11. Enter extra information in the custom fields.
12. When finished, click **OK**.

Modifying the employee information



1. Find the type to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

Deleting an employee

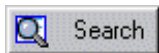


1. Find the type to delete and click on the **Delete** button.
2. Click **Yes**.

Note that you will not be able to delete an employee if he is assign to a job (quotation, work order or unpaid invoice).

Searching for an employee

Use the search section of the window



1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **View** button.

The list will the show all the employees that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button. Refer to chapter 2 to learn more on how to search a list

Setting up employee commissions

If your company uses a commission system to motivate its employees, you will be able to use Mistral 2000 to help you calculate this commission. The minute you assign an employee to an invoice, this employee will have his commission calculated automatically. Mistral 2000 can calculate up to 3 kinds of commission. We have:

- Commission on initial sales Calculate the employee's commission on the services that are not add-on sales.
- Commission on add-on sales Calculate the employee's commission on the add-on sales he made.
- Fixed commission Assign a fixed commission for each invoice.

Note that a commission is calculated only if the employee is linked to an invoice.

Examples

We have two employee linked to this job. We have one technician and one sales representative. Here are their commission:

Sales representative

Commission on initial sales: 30%

Commission on add-on sales: 0%

Fixed commission: 5\$ per invoice

Technician

Commission on initial sales: 10%

Commission on add-on sales: 30%

Fixed commission: 0\$ per invoice

Here is a description of the job:

Description	Extended		
Commercial Carpet - Carpet Cleaning	500.00	\$0.20	\$100.00
Commercial Carpet - Protector	500.00	\$0.10	\$50.00

The last line of the description is an add-on from the technician. The commission will be calculated this way:

Sales representative

Commission on initial sales: 30\$ (100\$ X 30%)

Commission on add-on sales: 0\$

Fixed commission: 5\$ per invoice

For a total of 35\$

Technician

Commission on initial sales: 10\$ (100\$ X 10%)

Commission on add-on sales: 15\$ (50\$ x 30%)

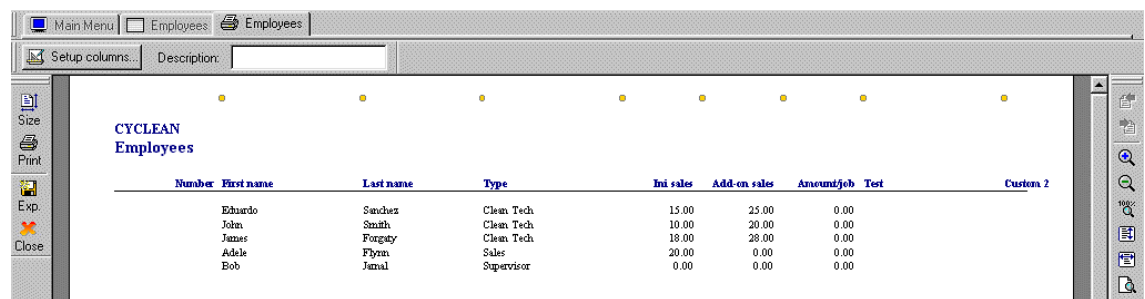
Fixed commission: 5\$ per invoice

For a total of 30\$

Note that there is no calculation made with the amount entered in the field Wage per hour. This amount is used only as information for the user.

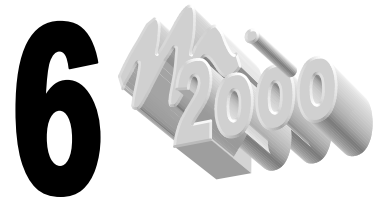
Print the employees' list

There may be several reasons for you to print your employees' list. Whatever they are, you can count on Mistral 2000 to help you achieve this task. Mistral 2000's powerful list allows you to print the list the way you need and want it. Choose the information to print, select only the employees and the columns you want. You can find the procedure on how to print the employees' list in the chapter 2 because printing the employees' list is like printing all the other lists of Mistral 2000.



Number	First name	Last name	Type	Ini sales	Add-on sales	Amount/job	Test	Custom 2
	Eduardo	Sanchez	Clean Tech.	15.00	25.00	0.00		
	John	Smith	Clean Tech.	10.00	20.00	0.00		
	James	Fungatey	Clean Tech.	18.00	28.00	0.00		
	Adèle	Flynn	Sales	20.00	0.00	0.00		
	Bob	Jamal	Supervisor	0.00	0.00	0.00		

CHAPTER 6



Invoicing

The process of invoicing

Mainly, the principle of invoicing is pretty simple. You create an invoice for each job you perform. But, your business is different from a grocery store. In a grocery store, the customer enters, chooses the items he wants to buy, goes to the cashier, pays and leaves. The customer will get an invoice for all the items that he bought. The principle is, in this case, is very easy. In the kind of business that you have, the process is slightly different. Most of the time, there is a delay between the order (the customer calls and ask a price for your services) and the payment of the invoice. During this delay, the order will pass through different states. In Mistral 2000 we have three different states for an order: The quotation, the work order and the invoice.

The order does not have to go through all those states. For instance, if the customer calls and needs your services, you will be able to create a work order without having to create a quotation first. It's the same thing with the invoice; you can always create an invoice directly without creating a quotation or a work order previously.

So why do we need all those states? Why can't we create invoice directly instead of creating a work order and then transform it into an invoice? The reason is very simple: Because it's a lot easier to manage. When you look at all your jobs, you know that the quotations are jobs that have not been authorized by the customer, that the work orders are jobs that have not been serviced yet and that the invoices are jobs that have been completed.

Mistral 2000 is also different from other programs. When creating the jobs, the program will make you work directly on your invoice template. In another word, you will fill up the invoice exactly like you would fill a paper form. The image of your invoice appears on the screen and the only thing that you will have to do is fill the blanks. Refer to chapter 10 to learn how to create your own invoice templates in Mistral 2000.

The Job List

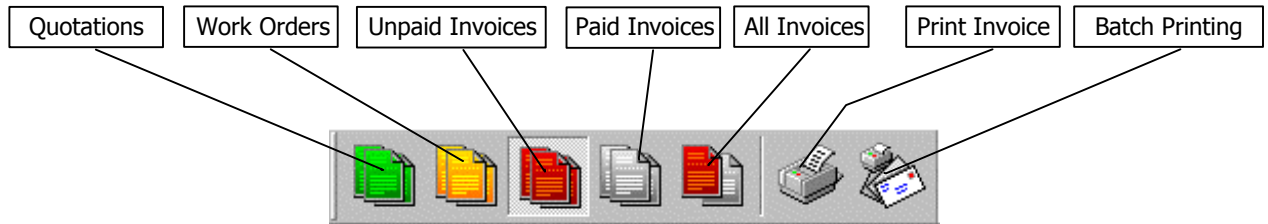
The Job list is the tool you use to manage all your jobs. This list allows you to view, add, modify, search, delete and print all the type of jobs. In this section, we will show you how to perform all those tasks.

Type of jobs

First of all, the job list contains five different lists.

- **Quotations' list.** List of Quotations created and not yet transformed into work orders.
- **Work orders' list.** List of work orders created and not yet transformed into invoices.
- **Unpaid invoices' list.** List of all the unpaid invoices. (Default when entering Job List).
- **Paid invoices' list.** List of all the paid invoices (invoice history).
- **Unpaid and paid invoices' list.** Combined lists of invoices.

We decided to separate each type of jobs in different lists to help you have a better look at your jobs. It's easier to manage and a lot more intuitive for the user. Use the Job list toolbar to select which list of jobs you want to work on.



Because the job list is like all the other lists in this system, you can use the List toolbar to create a new job, modify a job and delete or void a job (depending on the type of job).



Searching for a job

Use the search section of the window.

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.



The list will show all the jobs that correspond to the search query that you defined. To view the complete list again, click on the **All** button. To learn more about the search, refer to chapter 2.

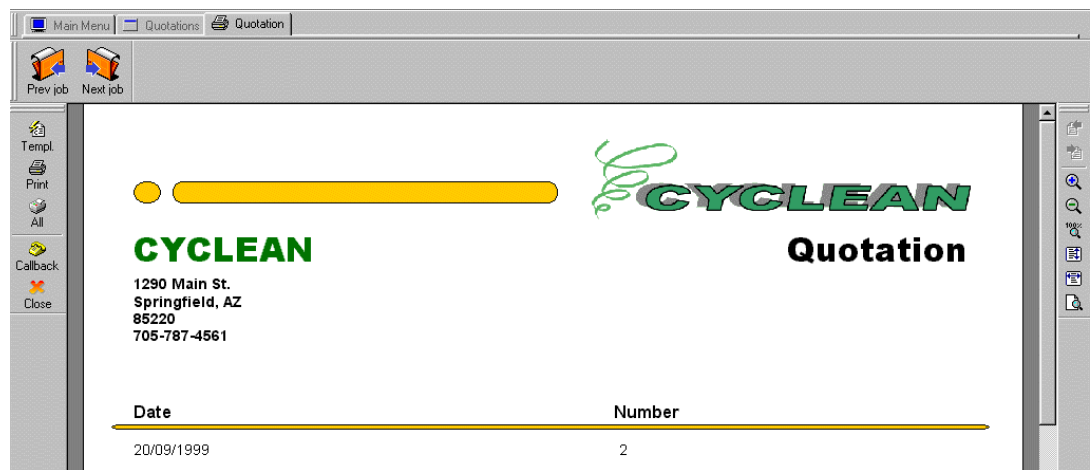
Print the Job list

There may be several reasons for you to print your jobs' list. Whatever they are, you can count on Mistral 2000 to help you achieve this task. Mistral 2000's powerful list allows you to print the list the way you need and want it. Choose the information to print, select only the jobs and the columns you want. You can find the procedure on how to print the jobs' list in the chapter 2 because printing the jobs' list is like printing all the other lists of Mistral 2000.

Note that printing the list is different from printing a mailing list, labels or personalized letters. The next section will show you how to perform those tasks.

Creating batch printing or mail merge from the Job list

In the job list, creating a batch print and a mail merge is the same. A batch print is printing all the jobs that we find in a list. Printing a mail merge is printing all the jobs that we find in a list but using a template different from the template normally used for the job. For instance, if you are currently viewing your quotations' list and click on the Batch printing / mail merge button, the system will bring you a preview window of all the quotations in the list.

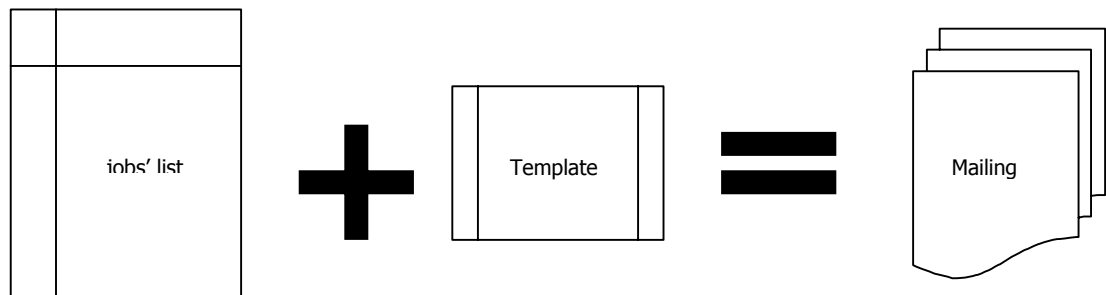


The system uses the quotation template as default for the quotation batch printing. But, if you change the template using the Template button, you will be able to use the quotations' list to print letters or even envelopes, depending on the template you choose.

What is a mail merge?

The mail merge is a new and wonderful tool of Mistral 2000. The mail merge allows you to create all kinds of mailing labels, personalized letters, envelopes and postcards, etc. The mail merge is a great tool to make you save a lot of time and money and also to improve your image.

The Mistral 2000 mail merge is so good that you do not need to use any other program. You can do absolutely everything from Mistral 2000. Here is the general principle of a mail merge:



You need two entities to create a mail merge. A list of information (jobs' list in this case) and a template (label, envelop, letter, etc.). The template contains fields that will be replaced by the customer information when we will merge the two entities together. A mail merge will create as many mailing items as there are items in the list of information. For instance, if you have 100 jobs in your list and you decide to merge this list with a label template, the results will be 100 personalized labels. So, the list + the template = to the mailing.

When you will press on the Merge button in your jobs' list, Mistral 2000 is going to use the list that you are currently viewing to create the mail merge. So, if you are currently viewing the list of all your quotations, Mistral is going to create the mailing for all your customers that have a quotation. If you want to create a mail merge for only a part of your quotations' list, you need to view only those quotations. Use the Search function to create a partial list.

You will also have to create mailing templates if you have not defined any. Refer to chapter 10 to learn how to create the templates.

Finally, if you need to create more complex mail merge, you can use the Mail merge function located in the Reports submenu. Refer to chapter 8 to learn how to create complex mail merge.

Building a job in Mistral 2000

In Mistral 2000, the quotations, work orders and invoices are built exactly the same way. The windows, the tools, the toolbars and the menus are exactly the same. The only difference is the type of job that you are creating.

The screenshot shows the Mistral 2000 - [Quotation] window. The menu bar includes File, Copy/Paste, Job, View, Window, and Help. The toolbar contains icons for Info, Customer, Site, Source, Services, Schedule, Note, and ->W.o. The main form area displays the CYCLEAN logo and the title 'CYCLEAN Quotation'. Below the logo, the address '1290 Main St. Springfield, AZ 85229' and phone number '705-787-4561' are listed. The form has several sections: a 'Date' section with '20/09/1999' and a 'Number' section with '4'; a 'Customer' section and a 'Site' section; and a 'Description' section with an 'Extended' field. The status bar at the bottom shows 'Ready' and 'Page 1/1'.

The screen represents the image (or a part) of your job's form. You can scroll the page to view the rest of the page. The rest of the window is made of toolbars and menus. Those objects contain tools to modify the look and the information of a job.

The toolbars

In a job window, we find four types of toolbars.

The Job toolbar. This toolbar is used to enter the basic information of a job.



Modify the settings of the job.



Enter the customer information.



Enter the site information.



Enter the source information.



Enter the job description (services to perform).



Assign employees and schedule the job.



Type a note (invisible to the customer).



Transform the quotation into a work order or the work order into an invoice.

The Job II toolbar. This toolbar is used to perform other kind of action on a job.



Templ.

Choose a different job template.



Print

Print the job (also saves the job).



Callback

Enter a callback for this customer.



Save

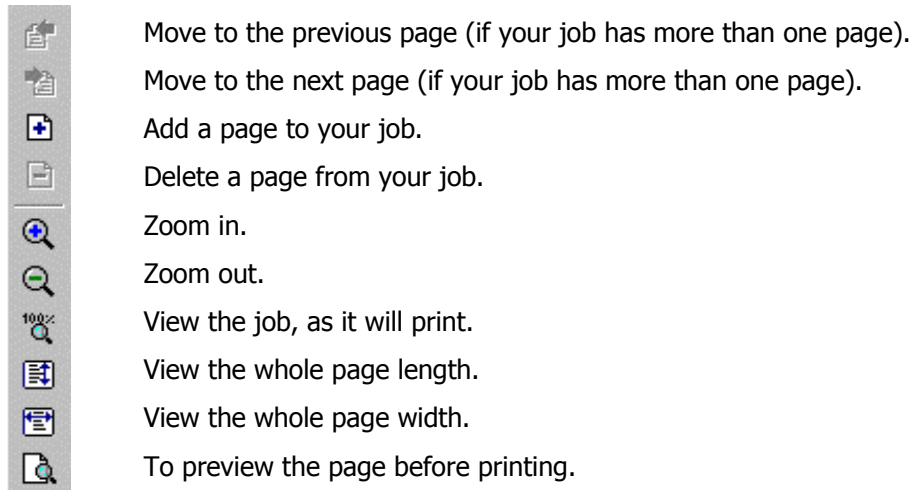
Save the job in your database.



Close

Exit from this window.

The Layout toolbar. This toolbar is used to change the view of the job.



The View Manager toolbar. This toolbar is used to switch from this window to other windows (or functions) of mistral 2000.



The menu



The menu is the gray line at the top of your window that contains six different choices. Like the toolbar, the menu contains tools to modify the look and the information of the job. In fact, some of the tools found in the toolbars are also included in the menus. The toolbars act as a shortcut, because, it's a lot faster to use the tools from the toolbars than from the menu. Here are the six choices we have:

File. This option contains option on the action you can take on the job.

Save Ctrl-S: Choose this option to save the job in the database.

Print... Ctrl-P: Choose this option to print the job.

Close: Choose this option to close the job window and go back to the Main menu.

Exit: Choose this option to exit from Mistral 2000.

The **Ctrl-S** and **Ctrl-P** are shortcuts. Instead of using your mouse to execute those functions, you can use the keyboard shortcut. In this case, the action is executed by pressing and holding the <Ctrl> key on your keyboard then by pressing the <S> key on your keyboard to save or <P> to print the job.

Copy/Paste. This option contains very useful and interesting functions. Use them to save a large amount of time when creating repeating jobs. With Mistral 2000, you be able to copy information from one job to another one or even create a duplicate of a job instantly. Great tool when you are creating repeat jobs.

Copy job Ctrl-C: Open the job you want to copy the information from and choose this option.

Paste job Ctrl-V: Open a new job and choose this option to paste the information you copied from the other job.

Duplicate job: Choose this option to make a duplicate of the job. You will be able to create instantly a new quotation, work order or invoice with exactly the same information except for the date and the job number.

Job. This option of the menu contains exactly the same tools as the Job toolbar.

Options: Modify the settings of the job.

Customer: Enter the customer information.

Site: Enter the site information.

Source: Enter the source information.

Line / Services: Enter the job description (services to perform).

Employees / Schedule: Assign employee and schedule the job.

Note / Comment: Type a note (invisible to the customer) or a comment that will appear on the job (only if you have setup your template with a comment section).

View. This option contains tools to change the view you have of the program.

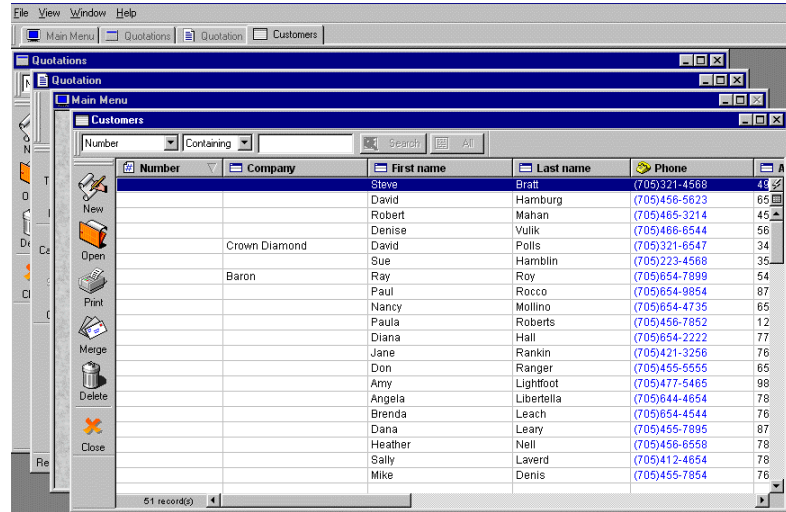
View Manager: If this function is checked, the View Manager toolbar appears on the screen. If it is not checked, then, the View Manager toolbar will not appear.

Full Screen: If this function is checked, you will not see the Task bar from Windows and the program line at the top. If not checked, then you will see those two bars. This function allows you to view more information on your screen.

The line that you find under the words **View Manager** and **Full Screen** are another indication of keyboard shortcut you can use. In this case, you can activate the function by pressing and holding the <Alt> key on your keyboard and then by pressing the underlined letter <V> on your keyboard for the View Manager function or <U> for the Full Screen function.

Window. This option contains tools to change the way you can visualize the windows of Mistral 2000. Remember that every time you open a job (quotation, work order or invoice) or a list, Mistral 2000 opens a new window. Most of the time, Mistral will only show the active window and will hide the other opened window behind the active one. You would have to use the View Manager to switch from a window to another one. Mistral 2000 provides tools to change the way you view those windows. Here they are:

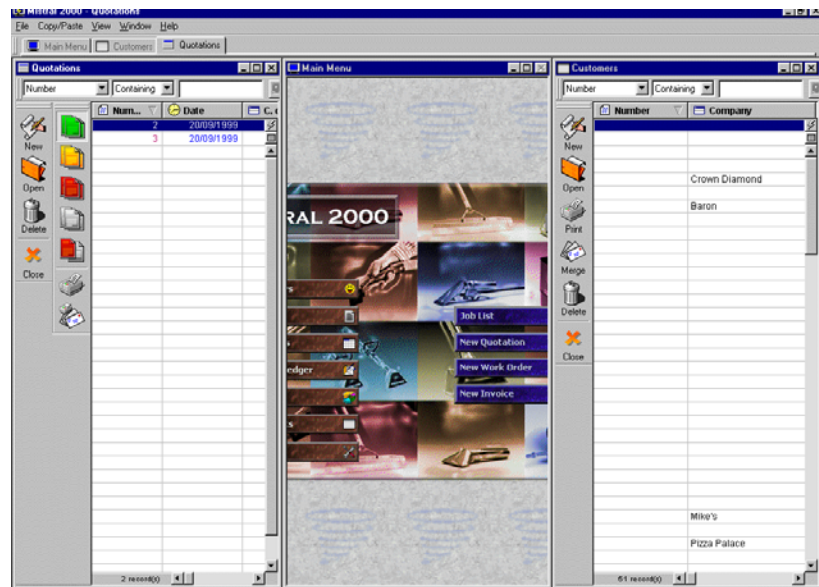
Cascade: All the open windows appear in cascade. Just click on the window's header to switch from a window to another.



Tile Horizontally: All the windows appear partially and are open on their width. Click on the window's header to switch from a window to another. Use this view option if you need to see the information from two or more different windows at the same time.



Tile Vertically: All the windows appear partially and are open on their height. Click on the window's header to switch from a window to another. Use this view option if you need to see the information from two or more different windows at the same time.



Arrange Icon: This tool does nothing in a job.

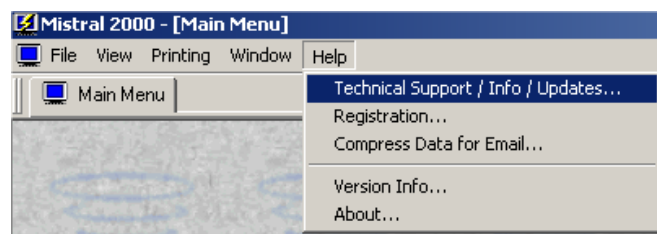
Close All: Use this tool to close all the windows of Mistral 2000 (except the Main Menu).

1 Main Menu: Choose this option to go back in the Main Menu.

2 Quotation: Choose this option to go back to the Quotation window (if you are in the Main Menu).

3...: This list may be bigger. In fact, it will contain all the windows that are currently open in Mistral 2000. You just have to choose the window where you want to go. It works like the View Manager.

Help. Contains information, help and tips on Mistral 2000.



Technical Support / Info / Update...: Choose to view a window that shows where and how you can find technical support, information on Mistral 2000 and other products of Cyclone Software and also where you can get upgrades for the program.

Registration...: Choose to register your program or to enter your monthly password if you are on the Mistral 2000 Purchasing Plan.

Compress data for Email...: Will automatically create a backup file that you can use to email your data to another office or to Cyclone Solutions for technical support.

Version Info...: Gives you information about what version of Mistral 2000 you currently have installed on your system.

About...: Gives you general information about Mistral 2000.

The service dialog box

In Mistral 2000, the service section of a job is made of lines. Each line represents a service or a description. The service dialog box is the tool we use to enter the job line description. This dialog box can take different layout depending on the type of information you want to put in the description of the services. Here are the four types of information you can enter using this box:

Service line. This is the most common type of information you will enter using the Service dialog box. Here are the components of a service

- Category
- Name
- Code
- Quantity
- Unit of measure
- Extended
- Account number
- Cost
- Tax
- 2nd tax
- Employee
- 3 custom fields

Refer to the chapter 3 to learn the basics on services.

Mainly, Mistral 2000 needs all this information for each service in order to give you all the results that you are expecting from this program. Most of the information that is included in a service is already entered when you create your services in the program setup (chapter 3). The only information that has to be entered when creating the description of the work is the quantity. You can also use the 3 custom fields to add extra information on a service. This information will be used later in the reports or can be shown on a template.

So, if you want to enter a service in the description of your work, you have to either enter the service code (if you know it by heart) or find the service in your Category and Service lists. To find it in your lists, first select the category then find the service in the drop down list. You will just have to enter the quantity to finalize the process.

Text line. The text line is used to type extra information about the description of the job. You can use it for special instructions from the client or to charge for something that you haven't included in your service list. You can enter a total at the end of the text line if you wish.

If you want, you can set Mistral to remember the text that you often use. Use the <MODIFY> option from the text drop-down list to enter text often used.

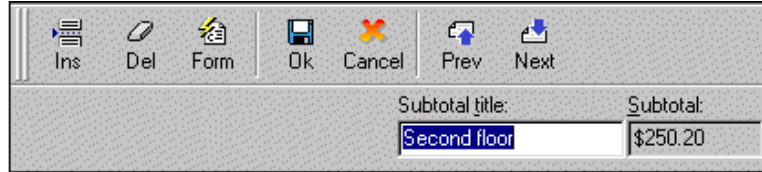
Title line. The Title line is used to subdivide the description of your work.

The difference between the **Text** line and the **Title** are:

- The Title line appears in bold
- The Title line does not have a price.

Like the text line, you can store lines that you often use. Use the <MODIFY> option to add new often used Title line.

Subtotal line. Line used to enter a subtotal in the middle of the description.




Use the **Form** button of the Service dialog box to switch between each type of line.

The Quotation

As we told you earlier, the quotation is (or can be) the first step in creating a job in Mistral 2000. We also told you that this state is not necessary in the invoicing process. Most of the time, you will create a quotation for bigger jobs, jobs that need authorization from the manager or from the administration. We suggest that you should not use the quotation for all the jobs, it would slow down your invoicing process.

This section will explain all the actions you can perform on a quotation.

Creating a quotation

This process consists in entering all the information related to the quotation. Most of the time, the information entered in a quotation is:

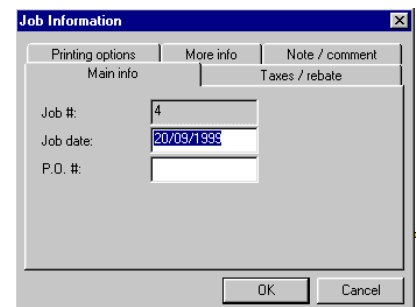
- The quotation date (Date the order was taken)
- The customer information
- The services performed
- The site information (optional)
- The source of the order (optional)
- A note (optional)

Quotation tutorial

Now that you know all the elements of the quotation's window, we will show you the complete procedure to create a new quotation. In this example, we will create a quotation for Mr. Wong of the Bill Wong Restaurants. Mr. Wong has five restaurants in the area and needs to clean one of his restaurants. First, open your new quotation window in the **Sample Company**.

The quotation's template appears on the screen under the *Job information* dialog box. Mistral 2000 assigns automatically a quotation number and asks for a date.

Accept the date and press **Tab**.
There is no PO number, click **OK**.



Now we will enter the quotation information following the logical steps proposed by Mistral 2000. Start from the left of your Job toolbar and click on the Customer icon.



1. The customer's list appears. Because it's a new customer, we will click on the New icon and enter his information.
1. Type the customer number **5551212** (optional), press **Tab**.
2. Type the company name, **Bill Wong Restaurants** (it's a commercial customer), press **Tab**.
3. In the drop-down list, choose a salutation, **Mr.** click and press **Tab**.
4. Type the first name, **Bill**, press **Tab**.
5. Type the last name, **Wong**, press **Tab**.
6. Type the attention of (it's a commercial customer), **Accounting department**, press **Tab**.
7. Type the phone number, **7055551212** press **Tab**. Mistral 2000 will automatically change the proper phone format.
8. Type the other phone number, **7055552121**, press **Tab**.
9. Type the fax number, **7055551111**, press **Tab**.
10. Type the address 1, **100 Main St.**, press **Tab**.
11. Type the address 2, **Suite B**, press **Tab**.
12. Type the cross street, **15th Ave**, press **Tab**.
13. Type the city, **Chandler**, or choose it from your drop down list, press **Tab**.
14. Type the state, **AZ**, if it is not already set up, press **Tab**.
15. Type the Zip code, **85222**, press **Tab**. Setup your Zip codes and save time! Refer to chapter 3 to learn how to setup your zip codes.
16. Choose a type, click **Commercial**.

To add more information, click on the **More info** tab.

1. Choose an initial source from the Initial source list, **Customer**, press **Tab**. In this case, Mr. Wong is referred to us from another customer, **Mr. Dom** from **Mike's**.
2. Because this initial source is another customer, select it from this list, press **Tab**. Use this function only if you want to keep track of your referrals.
3. This customer have not used your service before, so press **Tab**. (this date will be updated each time this customer uses your services again).
4. Select a price number. (Your service can have up to 5 different costs. Choose the one that applies to this customer). **1**, Press **Tab**.
5. Enter a default rebate (in %) for this customer, **10**, press **Tab**.
6. Enter no default rebate (an amount) for this customer, press **Tab**.
7. Enter information in your custom field. Refer to the chapter 3 to learn how to set up your custom fields.
8. Type a note. **Mr. Wong has 5 restaurants in the area. He wants a price and will decide within 2 weeks if he will use our services.**
9. Press **OK** when finished.

The program brings us back to the quotation with the customer section filled in. Let's continue and click on the **Site** icon.

1. Because the site is not in the list, we need to click on the **New** button.
2. Type the company name, **Bill Wong Chinese restaurant**, (it's a commercial site), press **Tab**.
3. Type the first name, **Cindy**, press **Tab**.
4. Type the last name, **Whu**, press **Tab**.

5. Press **Tab**.
6. Type the phone number, **7056661212** press **Tab**.
7. Press **Tab**.
8. Type the fax number, **7056662222**, press **Tab**.
9. Type the address 1, **205 Desert Hwy**, press **Tab**.
10. Press **Tab**.
11. Type the cross street, **Tempe Blvd.** press **Tab**.
12. Type the city, **Tempe**, press **Tab**.
13. Press **Tab**.
14. Type the Zip code, **85111** press **Tab**.
15. To add more information, click on the **More info** tab.
16. Enter information in your custom field. Refer to the chapter 3 to learn how to set up your custom fields.
17. Type a note.
18. Press **OK** when finished.

The program brings us back to the quotation with the customer and the site sections filled in. Let's continue and click on the **Source** icon.

1. Choose **Source** from the list and click the **Choose** button.

The program brings us back to the quotation with the customer, the site and source sections filled in. Let's continue and click on the **Services** button.

Mr. Wong has all his carpets that need to be cleaned and all his chairs. Let's enter the description.

1. Click on the **Form** icon and choose **Title**.
2. Type **Carpet cleaning**, press **Enter**.
3. Press **Enter** again to leave a blank line.
4. In Category, choose **Commercial carpet**, press **Tab**.
5. In Service, choose **Carpet Cleaning**. Click in the service field and add the text **in large dinning room**. Press **Tab**.
6. In quantity, type **2000** (for 2000 square feet), press **Enter**.
7. In Category, choose **Commercial carpet**, press **Tab**.
8. In Service, choose **Carpet Cleaning**. Click in the service field and add the text **in small dinning room**. Press **Tab**.
9. In quantity, type **1000**, press **Enter**.
10. In Category, choose **Commercial carpet**, press **Tab**.
11. In Service, choose **Carpet Cleaning**. Click in the service field and add the text **in entrance**. Press **Tab**.
12. In quantity, type **400**, press **Enter**.
13. Click on the **Form** icon and choose **Subtotal**.
14. Press **Enter**.
15. Press **Enter** again to leave a blank line.
16. Click on the **Form** icon and choose **Title**.
17. Type **Chair cleaning**, press **Enter**.
18. Press **Enter** again to leave a blank line.
19. In Category, choose **Chair**, press **Tab**.
20. In Service, choose **Cleaning, Extraction**. Press **Tab**.
21. In quantity, type **275**, press **Enter**.

Here is the result of what we entered:

Customer		Site	
Bill Wong Restaurants Bill Wong 100 Main St., Suite B Chandler, AZ, 85222 (705)555-1212		Bill Wong Chinese Restaurant Cindy Whu 205 Desert Hwy Tempe, AZ, 85111 (705)666-1212	
Description			Extended
Carpet Cleaning			
Commercial Carpet - Carpet Cleaning in large dining room	2,000.00	\$0.20	\$400.00
Commercial Carpet - Carpet Cleaning in small dining room	1,000.00	\$0.20	\$200.00
Commercial Carpet - Carpet Cleaning in entrance	400.00	\$0.20	\$80.00
		Subtotal	\$680.00
Chair cleaning			
Chair - Cleaning, Extraction	275.00	\$5.00	\$1,375.00

The quotation is now completed. All we need to do now is save and print it. It is very important to save the quotation. If you do not save it, you will lose this quotation and you will not be able to access to this quotation again. If you want, you can save it now and print it later. You can also enter a note on this quotation if you want.

- Click on the **Note** icon to enter a note that will not be visible to the customer.
- Click on the **Save** icon to save it.
- Click on the **Print** icon to print it.



Now, you can click on close to exit from the quotation window and go back to the main menu.

Modifying a quotation

Once you save a quotation, you can always go back and open it again from the jobs list. It will contain all the information you had put in it when it was created. One of the reasons you may want to go back in a quotation would be to make some modifications. Here are the steps to open and modify a quotation.

1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Quotation** icon (green icon) to view the list of quotations.
4. Find and double-click on the quotation you want to open, or highlight the Quotation and select open from the list of icons.
5. Using the tools provided, make the modification.
6. Save the quotation.
7. Print the quotation (optional).
8. Close the quotation.



Deleting a quotation

If your customer does not authorize a quotation you made, it becomes useless in your system. Here are the steps to remove this quotation from your system. Be careful, once deleted, you will not be able to access to this quotation again. Note that deleting a quotation does not delete the customer, site, source, etc. It only deletes the quotation itself.



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Quotation** icon (green icon) to view the list of quotations.
4. Find the quotation you want to delete.
5. Click on the **Delete** icon.

Transforming a quotation into a work order

If your customer does authorize the quotation you made you will have to transform this quotation into a work order. Here are the steps to transform a quotation into a work order.



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Quotation** icon (green icon) to view the list of quotations.
4. Find and double-click on the quotation you want to transform.
5. Click on the **Transform to work order** (->w.o.) icon.
6. Refer to the next section to learn how to add information into a work order.

Note that once transferred, the quotation will not be erased from the quotations' list until the work order is saved.

The Work Order

Creating a work order

As we told you earlier, the work order is (or can be) the second step in creating a job in Mistral 2000. We told you also that this state is not necessary in the invoicing process. Most of the time, you will create a work order for regular jobs. This state is very useful for the manager of the company. It gives a good idea of all the jobs that have been authorized by the customer but not done yet.

This process consists in entering all the information related to the work order. Most of the time, the information entered in a work order is:

- The work order date
- The customer information
- The services performed
- The site information (optional)
- The source of the order (optional)
- A note (optional)
- The employees
- The schedule information

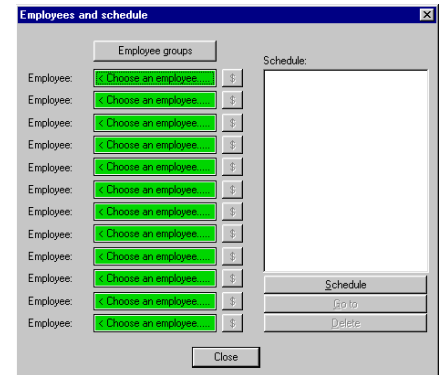
The Employees and Schedule dialog box

One of the pieces of information that we have to enter in a work order is the name of the employees involved in this work order. This information is entered in a dialog box called Employees and Schedule.

Employee groups

In this window, you can define groups of employees. Employee Groups are groups of employees that generally work together (teams). This will help you save time when entering the employees in the job. Here are the steps to create groups.

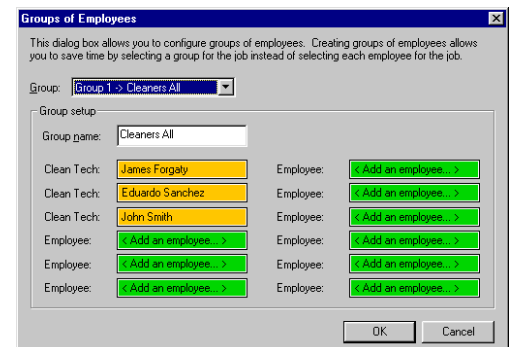
1. In the Employees and Schedule dialog box, click on the **Employee groups** button.
2. In the menu, choose **Configure Employee Groups...**



Groups of employees dialog box

Mistral 2000 lets you configure up to 12 groups of employees. Each group can contain up to 12 employees. To configure a group:

1. Select the group from the Group drop-downlist, press **Tab**.
2. Enter a name for this group.
3. Click on the Employee fields and select the employee associated to this group.
4. When finished, click **OK**.



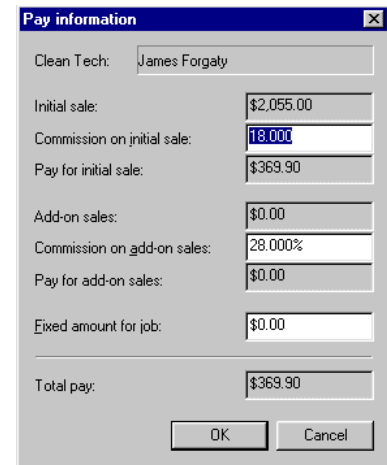
Now, when you want to associate this group to the job, click on Employee groups in the Employees and Schedule dialog box and select the group from the menu.

The Employee commission

Beside each employee chosen, you have a little button with a dollar sign. When you click on this dollar sign, the Pay window appears. This window shows the calculation of the commissions from what is configured for each one of the employees in their setup.

Pay information window

The commission rates are the rates setup in the employee information window. If you want, you can change the rates from this window.



The screenshot shows a window titled "Pay information" with a close button in the top right corner. The window contains the following fields and values:

Field	Value
Clean Tech:	James Forgaty
Initial sale:	\$2,055.00
Commission on initial sale:	18.00%
Pay for initial sale:	\$369.90
Add-on sales:	\$0.00
Commission on add-on sales:	28.000%
Pay for add-on sales:	\$0.00
Fixed amount for job:	\$0.00
Total pay:	\$369.90

At the bottom right of the window are two buttons: "OK" and "Cancel".

Work Order tutorial

In the previous section, we learned how to build a quotation. The tutorial showed us how to enter the customer, the site, the source and the services. If you are building a work order from the start, you will have to follow exactly the same steps to enter that information. In this tutorial, we will show you how to enter the employee information and how to schedule the job.

Finally, Mr. Wong accepted the job and wants us to clean his restaurant as soon as possible.

1. Open the quotation and transform it into a work order.
2. Click on the Schedule button.
3. The Employees and Schedule window appears.
4. Click on the first employee field and choose **James Forgaty** and click on choose.
5. Click on the Schedule button in the lower right hand corner.
6. In the Block properties window, choose a block length of 6 hours.
7. The schedule will give you a block of six hours. This block is light green and needs to be placed somewhere in the schedule. We will place it Friday September the 24th at 12h00 am. Refer to the next chapter to learn more on the schedule. Click on the Close icon to go back to the Employee and Schedule window.
8. Six hours is not enough to do the entire job. We need another six hours. We will schedule another block. Click on schedule again.
9. In the Block properties window, choose a block length of 6 hours.
10. The schedule will give you another block of six hours. We will place it Saturday September the 25th at 12h00 am. Click on the Close icon to go back to the Employee and Schedule window.
11. Click the Close button to go back in the work order.
12. That's it with the work order. We can now save this work order and print it.

Modifying a work order

Once you save a work order, you can always go back and open it again. It will contain all the information you had put in it when it was created. One of the reasons you may want to go back in a work order would be to make some modifications. Here are the steps to open and modify a work order.



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Work order** icon (yellow icon) to view the list of work orders.
4. Find and double-click on the work order you want to open, or highlight the work order and select open from the list of icons.
5. Using the tools provided, make the modification.
6. Save the work order.
7. Print the work order (optional).
8. Close the work order.

Reservice

Do you have a lot of jobs that need to be reserviced? Do you know why your customers are not satisfied and need you to go back and fix the problem? Mistral 2000 has a new tool to help you manage the reservice. Every time a job needs to be done again, you will be able to set this job as "needs to be reserviced" and enter the reason why it needs to be reserviced. Later, you will be able to set this job as reserviced. Why all that? Because Mistral 2000's powerful report can compile the information on your reserviced jobs. You will then be aware of the problem that may cause all these jobs to be reserviced.

Follow those steps to set a work order as a reservice:

1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Work order** icon (yellow icon) to view the list of work orders.
4. Find and double-click on the work order you want to reservice.
5. Click on the **Info** icon.
6. Click on the More Info tab.
7. Check the *Job has to be reserviced* check box.
8. Type the reason why the job needs a reservice.
9. Save the work order.
10. Close the work order.

Once reserviced, you will just have to reopen this work order follow the same steps and set the job as "Job has been reserviced".

Deleting a work order

If your customer cancels a job, the work order you made becomes useless in your system. Here are the steps to remove this work order from your system. Be careful, once deleted, you will not be able to access to this work order again. Note that deleting a work order does not delete the customer, site, source, etc. It only deletes the work order itself.



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Work order** icon (yellow icon) to view the list of work orders.
4. Find the work order you want to delete.
5. Click on the **Delete** icon.

Transforming a work order into an invoice

Once the job is completed, you will have to create an invoice for this job. Mistral 2000 offers an easy to use function that allows you to transform this work order into an invoice.



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Work order** icon (yellow icon) to view the list of work orders.
4. Find and double-click on the work order you want to transform.
5. Click on the **Transform to work order (->Invoice)** icon.
6. Refer to the next section to learn how to add information into a work order.

Note that once transferred and saved, the work order will be erased from the work orders' list.

The Invoice

Creating an invoice

As we told you earlier, the invoice is (or can be) the third and last step in creating a job in Mistral 2000. Most of the time, you will create an invoice from a work order. But, there are situations where it would be preferable to directly create an invoice without creating a work order or a quotation beforehand, for instance if a customer comes to your office and buys a product from you instead a service.

This process consists in entering all the information related to the invoice. Most of the time, the information entered in an invoice is:

- The invoice date
- The customer information
- The services performed
- The site information (optional)
- The source of the order (optional)
- A note (optional)
- The employees
- The schedule information
- The payment information

Invoice tutorial

In the previous sections, we learned how to build a quotation and a work order. The tutorial showed us how to enter the customer, the site, the source, the services, the employees and the schedule information. If you are building an invoice from the start, you will have to follow those exact same steps to enter that information in an invoice. In this tutorial, we will show you how to enter the payment.

Finally, Mr. Wong is very happy with the job your company performed and he is now ready to pay for it.

1. Open the work order and transform it into an invoice.
2. Click on the payment button.
3. The Customer payment window appears.
4. Choose the payment type from the drop-down list, **Check**, press **Tab**.
5. Accept the date, press **Tab**.
6. Enter the amount, \$2,178.30, press **Tab**.
7. Enter the check number in the note section, 1565, press **Tab**.
8. Click on the blank field in the Payment column and beside the invoice associated with the payment.
9. Click on the **Record** button.
10. Click close to close the invoice.
11. If you receive a message that states "this transaction is unbalanced and will result in a credit of..." then the client has either paid more that what was needed to pay the invoice or you have forgotten to complete step "8" above. At this point you may either select "OK" to have the credit applied to your clients account, or select "Cancel" to make the appropriate modifications to have the transaction balance.

Modifying an invoice

Once you save an invoice, you can always go back and open it again. It will contain all the information you had put in it when it was created. One of the reasons you may want to go back in an invoice would be to make some modifications. Here are the steps to open and modify an invoice. **Note:** *Be very careful about modifying saved invoices.*



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Invoice** icon (red or gray icon) to view the list of invoices.
4. Find and double-click on the invoice you want to open.
5. Using the tools provided, make the modification.
6. Save the invoice.
7. Print the invoice (if you want).
8. Close the invoice.

Delete an invoice



Mistral 2000 does not allow you to delete a saved invoice. An invoice can only be voided once saved.

Voiding an invoice

Mistral 2000 allows you to void an invoice from your database. The voided invoice never really disappears from your system; it just stays there but has a null amount. We leave it in your paid invoices list to make it easier for you to track them. Here are the steps to void an invoice from your system. Note that you can always cancel a voided invoice and reintegrate it into the list of invoices. It would then revert back to the amount it had before it was voided.



1. From the Main Menu, choose **Invoicing**.
2. From the Invoicing menu, choose **Job list**.
3. Click on the **Invoice** icon (red or gray icon) to view the list of invoices.
4. Find the invoice you want to delete.
5. Click on the **Void** icon.

Applying a payment to an invoice

There are three ways for you to enter a payment for an invoice. You can enter a payment from the customer information window, from the invoice list or from the invoice window itself. Whatever the way you use, the principle to enter a payment stays the same.

Number	Date	Total	Balance	Payment
24	20/09/1999	\$2,178.30	\$2,178.30	

The new and improve payment feature allows you to enter a payment not only for one invoice but also for all the invoices attached to this customer. Also, you will be able to view all the payments history for this customer.

Payment options from the customer window.

Like we told you previously, you can enter a payment from the customer information window. This window also contains other information like the balance owing for this customer and the credit balance for this customer. Why a credit balance? Because Mistral can manage the credits and the over payment from your customer.

The screenshot shows a window titled "Bill Wong Restaurants, Wong, Bill". It has three tabs: "Main info", "More info", and "Payments". The "Payments" tab is active. It displays a "Balance:" field with the value "\$2,178.30". Below this are two buttons: "Enter payment..." and "View payments...". Further down is a "Credit:" field with the value "\$0.00", followed by three buttons: "Refund customer...", "Apply to invoices...", and "View refunds...". At the bottom right are "OK" and "Cancel" buttons.

Here is what happens when you receive a check that has an amount bigger than the total of the customer balance. In this situation, you have three choices:

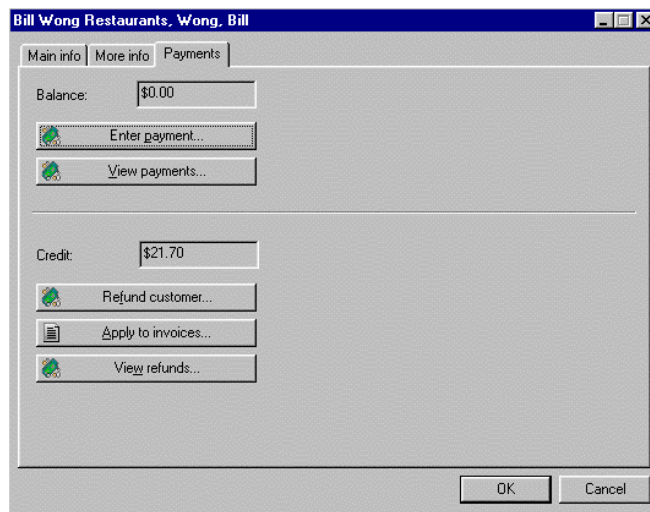
- Return the check and wait for another one.
- Keep the check, apply the amount on the invoice and keep the extra to pay a future invoice.
- Keep the check, apply the amount on the invoice and send a refund for the extra.

In the following situation, we received a check of \$2,200.00 for an invoice of \$2,178.30. You just have to enter the payment and apply this payment on the invoice(s). When finished, you just have to press **Record**.

The screenshot shows a window titled "Customer Payment". It contains the following fields: "Customer:" (Bill Wong Restaurants, Wong, Bill), "Payment type:" (Cheque), "Date:" (20/09/1999), "Amount received:" (\$2,200.00), "Note:" (empty), and "Account:" (1000). On the right side, there are buttons for "Record", "Clear", "View payments...", and "Close". Below the fields is a table with the following columns: "Number", "Date", "Total", "Balance", and "Payment". The table contains one record with the following values: Number 24, Date 20/09/1999, Total \$2,178.30, Balance \$2,178.30, and Payment \$2,178.30. At the bottom left, it says "1 record(s)".

Number	Date	Total	Balance	Payment
24	20/09/1999	\$2,178.30	\$2,178.30	\$2,178.30

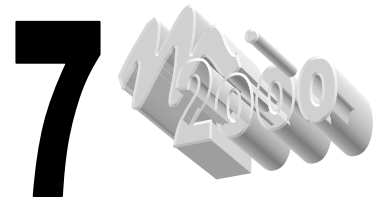
The program will advise you that the payment is unbalance and will ask you if you want to continue. Click **Yes**. Click Close to exit from the Customer Payment window and come back in the Payments. As you can see, the customer balance is now \$0.00 and he has a credit of \$21.70.



You can now:

- Refund the customer.
- Apply this credit on a future invoice.
- Delete the payment.

CHAPTER 7



Scheduling

Mistral 2000 provides tools to manage your customers, employees and jobs. But, as a good and organized business, you also need a tool to make all those entities work together properly. Mistral has the solution: The schedule. The schedule or schedules (you can have as many schedules as you want) are mainly calendars that contain blocks of information. Each block represents a job and each block is linked to one or more technicians.

The number of schedules that you will use depends on your company's needs. If you only have one crew on the road, you will probably need only one schedule, but, on the other side, if you have a bigger company, with sales representatives, technicians, supervisors, etc. you will probably need more than one schedule.

The elements of a schedule

The schedule identity

In Mistral 2000 a schedule is an entity in itself. Each schedule has a name and each schedule contains days. Virtually, each schedule you create in Mistral 2000 can go to year 9999... that leaves us a little bit less than 8000 years to schedule jobs. Scheduling is basically, reserving a period of time to serve one of your customers. This period of time, in Mistral 2000, is called a block.

With Mistral, you can create as many schedules as you want. If you have two trucks on the road plus one sale representative, then you will probably need three schedules; one for each truck and one for the sales. Each schedule has his own calendar so, has his own blocks. When you will schedule a job in Mistral 2000, you will need to know where you will schedule that job.

Creating a schedule

The schedules are created from a window we call the Schedule list. This list is like all the other lists of Mistral. Each item listed in this window represents a different schedule. Here are the steps to add or create a new schedule in Mistral:

1. In the Main menu, click on **Schedules**.
2. In the Schedules menu, click on **Schedule List**.
3. In the list of schedules, click on the **New** button.
4. Type the name, press **Tab**.
5. Type the phone number (optional), press **Tab**.
6. Type a note (optional).
7. When finished, click **OK**.

To modify or add information to schedule

1. Find the schedule to modify and click on the **Open** button.
2. Make the modification.
3. When finished, click **OK**.

To delete a schedule

1. Find the schedule to delete and click on the **Delete** button.
2. Click **Yes**.

NOTE: Deleting a schedule that has related jobs will remove them from the schedule. Consider renaming the schedule instead.

To search for a schedule

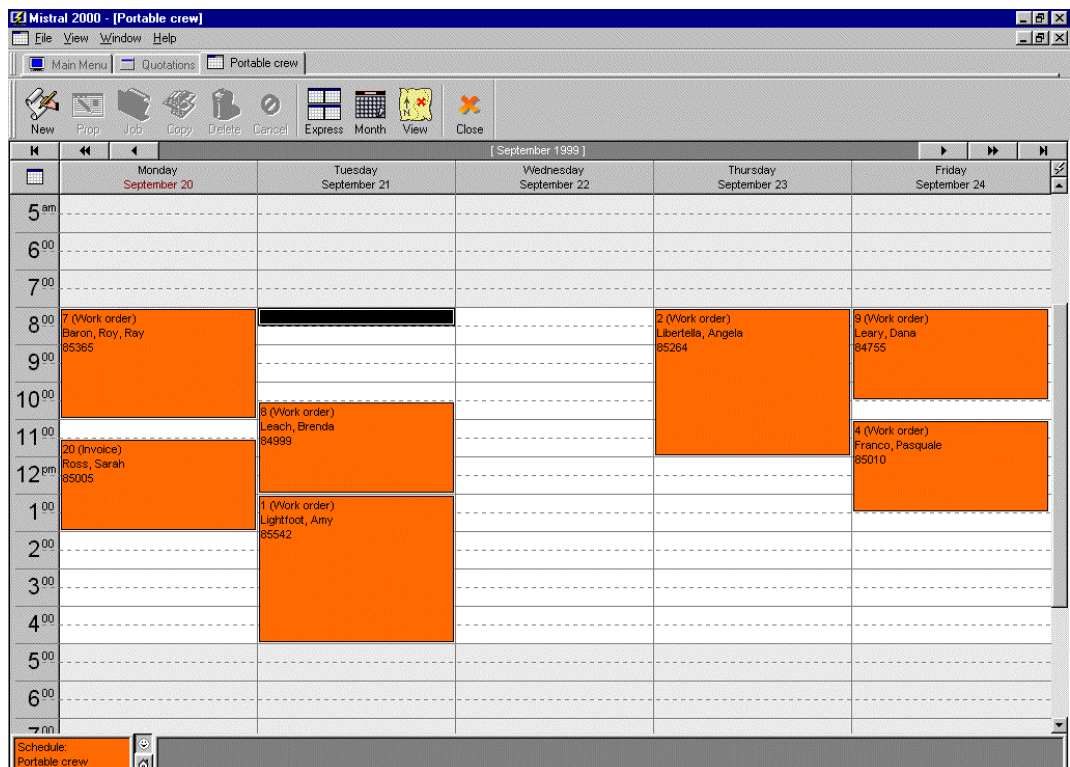
Use the search section of the window

1. In the drop-down list, click on the information to look for, press **Tab**.
2. In the next drop-down list, choose an operator, press **Tab**.
3. Enter the value(s) to look for.
4. Click on the **Search** button.

The list will show all the schedules that correspond to the search criteria that you defined. To view the complete list again, click on the **All** button.

Viewing the schedules

Mistral 2000 has a special window where you can view your schedules. This powerful window allows you to perform a lot of actions. You will be able to view up to ten schedules at the same time, you will be able to schedule your jobs, move jobs from one schedule to another one, view your schedule for the month, etc.

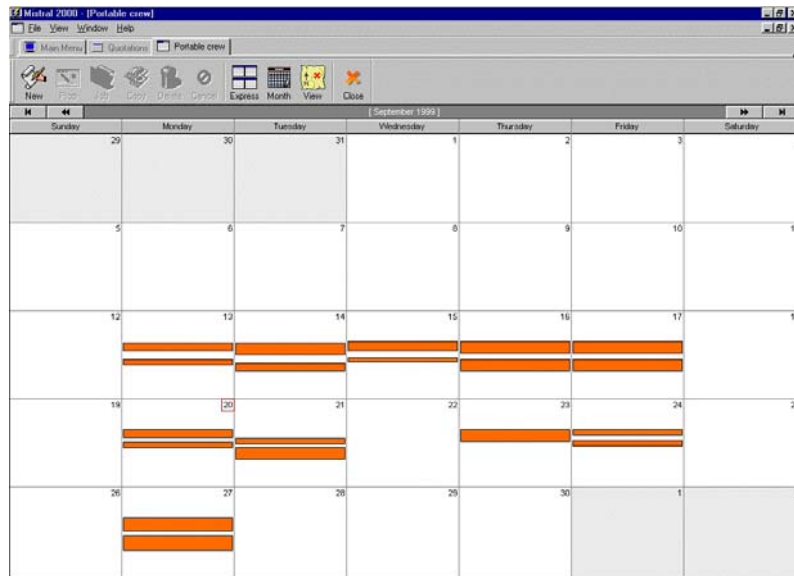
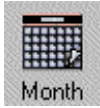


Moving in the schedule

The schedule window of Mistral 2000 allows you to have different views of one or more schedules. The main goal of this window is to give the best idea of what are your free periods and what are your busy periods.

Main views

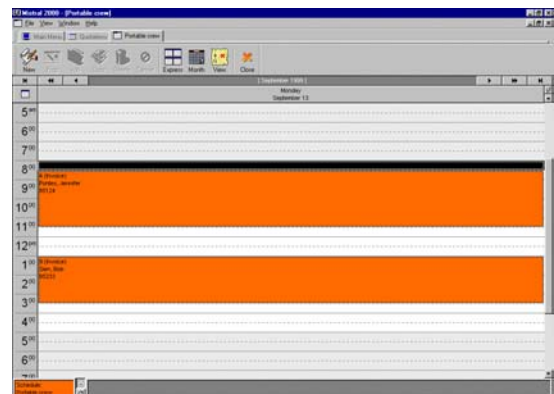
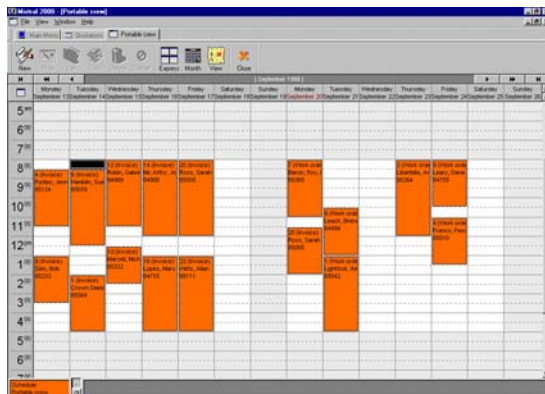
There are two different ways you can view the schedules. The daily view or the monthly view. The monthly view allows you to view only your schedules; you will not be able to make any modification in this view. Click on this button to view the monthly view. To switch back to the daily view, you just have to click on the day that you want to show the detail of.



The daily view

The daily view is the only one that you can use to make modification in the schedule. This view allows you to view from 1 to 14 days of scheduled blocks. Each day is made of 24 hours, but only a part of this day can be viewed on the screen, but that does not stop you from scheduling or viewing other periods of the day. Here is how you can change the number of days you can view:

1. Click on this button.
2. Choose the **Number of days** option.
3. Select the number of days wanted.



Moving in the schedule

Normally, when you enter in the Schedule window, Mistral shows today's schedule or a period of the month that includes today's schedule (if you are viewing more than one day). Mistral has different tools to move the days that you are viewing.

The arrows on the screen

You can find two sets of arrows at the top of you schedule. Those arrows are used to move your view of the schedule.

Click on this arrow to:



Move your view to the beginning of the month.



Move your view of one set of days. If you are currently viewing 5 days, clicking on this arrow will bring you to the five days before.



Move back your view of one day.



Move forward your view to the beginning of the next month.



Move forward your view of one set of days. If you are currently viewing 5 days, clicking on this arrow will bring you to the next five days.



Move forward your view of one day.

The arrows on the keyboard

You can also use the arrows on your keyboard to move your view of the schedule.

The blocks

The blocks are the way for Mistral 2000 to show you that this period of the day is assigned to a job.

Attributes of a job block:

Job number: Each block is linked to a job (quotation, work order or invoice).

Schedule name: Each block is attached to one schedule.

Block date: Each block is schedule to one date.

Block time: Each block has a starting time.

Block length: Each block has a length of time.

When you place a block in a schedule you actually set all the attributes of the block.

Modifying a block

The first thing you can do with a block is, naturally, to schedule it. But, outside of this are very important actions; you can do lots of other actions on a block.

You can move a block inside a schedule (to another time or day)

1. Click on the block to move (it will turn in green).
2. Hold and drag the block to its new location.
3. Press <ENTER> on your keyboard or click in a free area of the schedule to drop the block.

You can move a block to another schedule

1. Can be done only if you are viewing more than one schedule on the screen.
2. Click on the block to move (it will turn in green).
3. Hold and drag the block to its new location.
4. Press <ENTER> on your keyboard or click in a free area of the schedule to drop the block.

You can change its length of time

1. Click on the block to modify (it will turn in green).
2. Move your mouse to the line at top or bottom of the block (the cursor will change).
3. Click, hold the button and move the limit to obtain the desired length.
4. Press <ENTER> on your keyboard or click in a free area of the schedule to drop the block.

Or

1. Click on the block to modify (it will turn in green).
2. Click on the **Prop** button (in the toolbar).
3. Modify the block length.
4. Click **Ok**.
5. Press <ENTER> on your keyboard or click in a free area of the schedule to drop the block.

You can attach a note

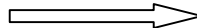
1. Click on the block to modify (it will turn in green).
2. Click on the **Prop** button (in the toolbar).
3. Add the text in the note section.
4. Click **Ok**.
5. Press <ENTER> on your keyboard or click in a free area of the schedule to drop the block.

You can change its text display

You can decide of the text that is displayed inside the block.



1. Click on this icon on the left.
2. Select "**Block text setup...**"
3. In the new window select the information you would like to display in the block.
4. Click **Ok**.



The schedule groups

This is the most amazing feature of the Mistral's schedule window. As you know, you can create as many schedule as you want. If you have eight trucks on the road and each one of them has its own schedule it would probably be very useful for you to view all the schedules at the same time. With Mistral 2000, this is no longer a myth, but a reality.

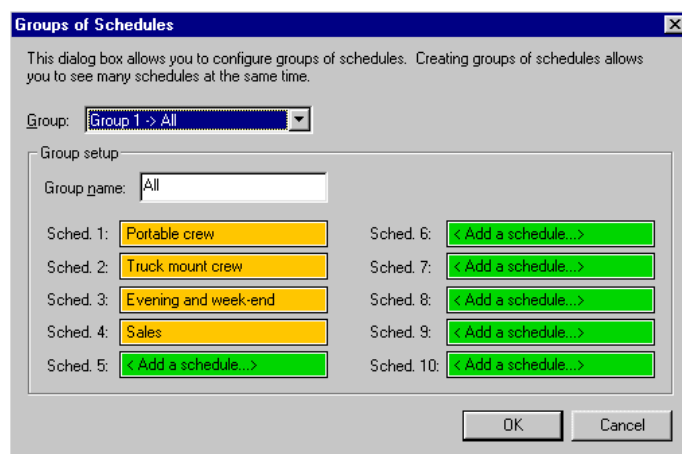
To be able to view more than one schedule at one time in the window, you need to create a group of schedules. If you create a group of two schedules, you will see two schedules at the same time on your screen. If you create a group of eight schedules, you will see eight schedules at the same time in the window. Mistral 2000 allows you to view up to ten schedules at the same time on your screen so; the maximum of schedule that you can set in a group is ten.

You can setup your groups the way you want. You can setup the groups per geographical area or per type of service for instance or to possibly separate Sales Staff schedules from Technicians schedules. You will be able to name the group in order to facilitate your choice of group.

Creating a group of schedules

The first step you need to do before creating groups of schedule is to create the schedules themselves. Refer to the beginning of this chapter to learn how to create your schedule.

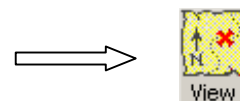
1. In the Main menu, click on **Schedules**.
2. In the Schedules menu, click on **Schedules**.
3. In the Schedule window, click on the **View** button.
4. In the menu, choose the option **Configure Schedule Groups...**
 - a. As default, Mistral is proposing to setup the first group.
 - b. If you want to modify another group, select it from the group list, press Tab.
 - c. Type a name for this group (All trucks, for instance) in the Group Name window.
 - d. Use your mouse to select the schedules you want to include in this group.
 - e. Press OK, when finished.



Selecting a group

Now that you have configured your group, you are ready to view your group in the schedule window. Here are the steps to choose a group.

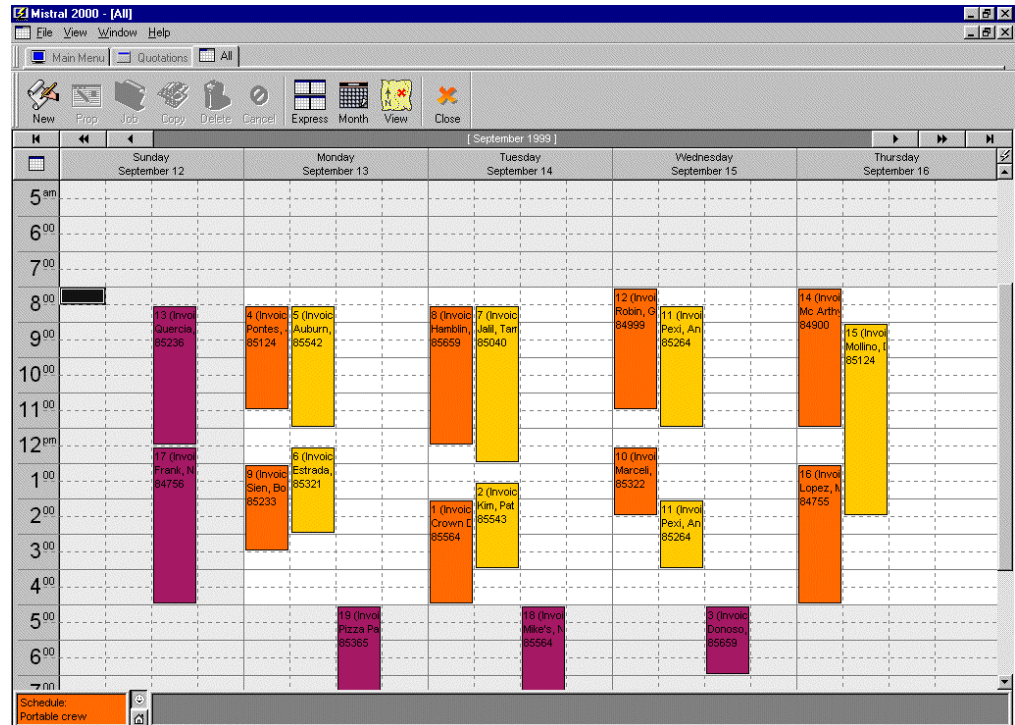
1. In the Main menu, click on **Schedules**.
2. In the Schedules menu, click on **Schedules**.
3. In the Schedule window, click on the **View** icon.
4. In the menu, choose the option **Schedule groups**.
5. In the group list, select the group you want to display.



Follow those steps to display only one schedule:

1. In the Main menu, click on **Schedules**.
2. In the Schedules menu, click on **Schedules**.
3. In the Schedule window, click on the **View** icon.
4. In the bottom of the menu, choose the Schedule to display.
5. In the group list, select the group you want to display.

Viewing the schedule using groups



Scheduling a job

There are two procedures you can use to schedule a job. The principle is the same but the access to get to the schedule window is different. In both cases, you will have to create the job before you schedule it.

From the Job "window

This is the most common way. You create the job (quotation, work order or invoice) you enter all its information and then, you schedule it.

1. From the job window, click on the **Schedule** button.
2. After selecting an employee from the **Employees and schedule** window, click on **schedule** in the lower right hand corner.
3. The Block Properties window appears. Select a length in the list then press **Tab**.
4. Type a note (optional).
5. Press <ENTER> on your keyboard or click **OK** when finished.
6. Mistral will then show you the schedule window with the current block in light green.
7. Move the block to the desired location and press <ENTER> on your keyboard or click in a free area of the schedule.

Note that even if you are scheduling a block, you are allowed to make any modification inside the schedule. You can now move blocks, delete or modify blocks, change the view or the settings, change groups or configure new groups.

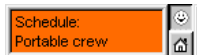
From the Main Menu

This is the other way of scheduling. Even if you are not scheduling from the job itself, it is required to create the job before you schedule it.

1. From the Main menu, click on the **Schedules** button.
2. In the **Schedule** sub-menu, choose **Schedule**.
3. Click in the free area where you want to schedule the new block.
4. In the Schedule window, click on the **New** button.
5. The Block Properties window appears. Click on the Job List button to choose a job.
6. Select a length in the list, press **Tab**.
7. Type a note (optional).
8. Press <ENTER> on your keyboard or click **OK** when finished.
9. Mistral will then show you the schedule window with the current block in light green.
10. You can then drop the block there or move it to the desired location and press <ENTER> or click in a free area of the schedule.

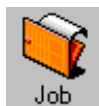
Other scheduling functions

View the customer information



Every time you put your mouse pointer over a block, the window shows the customer information attached to the block. Click on the happy face or on the house to switch between the Billing address and the site information.

Open a job from a schedule



From the schedule, you will be able to open the job that is attached to the block. Click on the block and then click on the Open button.

Copy a block



You will be able to create easily a copy of a block if the job you are scheduling needs more than a block. Click on the block to copy and then click on the Copy button. Move and drop the duplicate to its location.

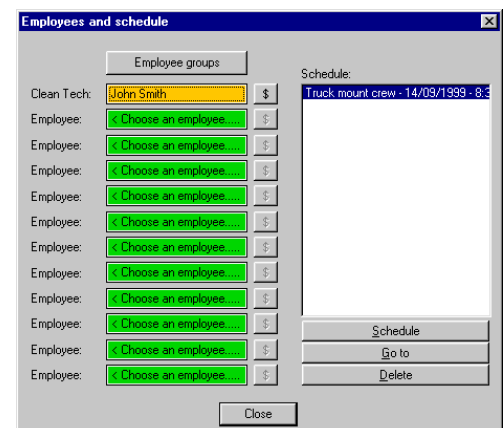
Delete a block



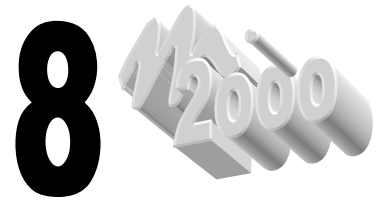
Finally, you will be able to delete a block from the schedule. Click on the block to delete and click on the Delete button. Note that deleting a block does not delete the job or the technician associated with the job.

Employees and schedule window

From this window, you can access directly to the schedule block. Select the block from the list and click on the Go to button. To delete a block from the schedule, select it from the list and click on the **Delete** button.



CHAPTER 8



Reports and Mail merge

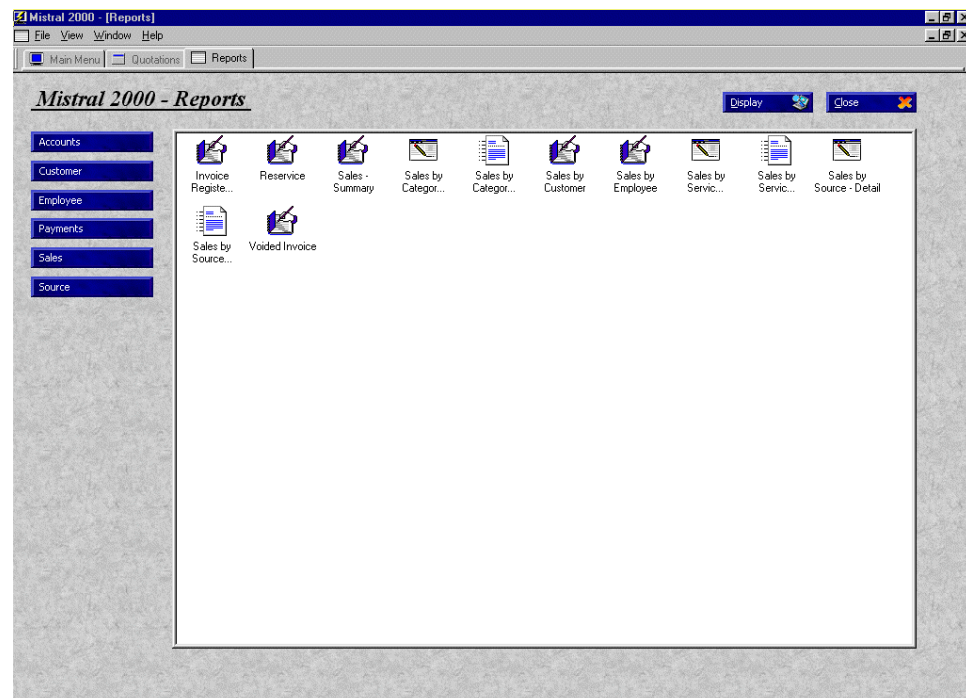
Reports

The reports are probably the main reason why we use computers to manage our business. They can take all the data that we put into the database, compile it and give you results that would take hours and hours for you to calculate by hand. They allow you to know and feel things that would not be possible if you were not using a computer to generate your reports. Here's how you can access to the Mistral 2000 reports.

1. Click on the **Reports** button in your Main Menu.
2. Click on the **Reports** button in the Reports submenu.

Choosing the right report

In Mistral 2000, we made a great improvement in this section. We choose to cut a little bit in the flexibility to give you a report module that can friendly user and also very powerful. We are now offering a list of different reports you can generate based on a main criterion.



On the left side of the window, you can find the main criteria. Each time you select a criterion on the left, the list of report change in the large window. Each report is represented by an icon and by a small description. Here is a description of all the criteria and the reports. As with most Windows Icons, you must first highlight it by clicking once on top of the icon to be able to read the whole name of the report.

Accounts

The Accounts reports are generated from the accounts' information in the General Ledger and from the jobs. Use those reports to analyze your sales and transactions on the accounts. You can also use those reports to manually export your information to other accounting software.

Accounts Inquiry – Detail

This report details all the transactions that were done on each account of your chart of accounts during a period. So, for each account, you will get the detail of each transaction that applied to this account during a period of time you defined. The transaction detail includes the date, the type of transaction and the amount of this transaction.

Accounts Inquiry – Summary

Same as the previous report but it does not give you the detail of each transaction but makes a total of those transactions for each account.

Customer

The Customer reports are generated from the customers' information and from the jobs. Use those reports to generate the receivable reports or to print a list of your customers.

Account Statement

This report generates an account statement for each customer that owes you money. In each statement, the report gives you the information about the customer and the detail of each invoice that is unpaid. This is perfect for sending out monthly statements.

Aging – Detail

This report gives you a list of all the customers that owe you money. For each customer, the report gives you the information about the detail of each invoice that is unpaid and their balances distributed on a period of time. So, you will know if this balance is less than 30 days old, between 30 and 60 days, between 60 and 90 days old or older than 90 days. For each customer, the report calculates the total of the balances for each period and the total of money that this customer owes you. At the end of the report, you will find a total of your receivables distributed over the periods and a total of all your receivables. Perfect for making collection calls.

Aging – Summary

This report gives you a list of all the customers that owe you money. For each customer, the report calculates the total of the balances for each period (0-30 days, 30-60 days, 60-90 days, 90 days and +) and the total of money that this customer owes you. At the end of the report, you will find a total of your receivables distributed over the periods and a total of all your receivables.

Customer list – Summary

This report allows you to print a list of all the customers that used your services inside a period of time that you define.

Employee

The Employee reports are generated from the employee information and from the jobs. Use those reports to generate the employee commission, to analyze their performance and to check their job quality.

Employee Commission – Detail

This report generates a list of all your employees and the commission they made on each invoice during a period of time. The report gives you the information on the employee and the commission

that they made on the initial sales, add-on sales and fixed amount. It will also calculate a total of all the commissions for each employee and for all the employees.

Employee Commission – Summary

This report generates a list of all your employees and the commission they made during a period of time without giving you a detail for each invoice. The report gives you the information on the employee and the commission that they made on the initial sales, add-on sales and fixed amount. It will also calculate a total of all the commissions for each employee and for all the employees.

Employee list – Summary

This report allows you to print a list of all your employees.

Employee Reservice

This report gives you a list of all jobs attached to each employee that had to be reserviced during a period of time. For each one of your employees, the report gives you the list of the jobs the reason why it needed to be reserviced and if the job has been reserviced or not.

Payment

The Payment reports are generated from the payments used by your customers to pay their invoices. Use those reports to analyze your income or to reconcile your bank accounts.

Payment – Detail

This report gives you a list all the payment types used by your customers to pay their invoices. For each type, the report generates a list of all the invoices that were paid with this payment type, the payment date, the amount paid and the payment's General Ledger account number.

Payment – Summary

This report gives you a list all the payment types used by your customers to pay their invoices. For each type, the report generates the amount received and the total number of invoices that were paid.

Sales

Use the following reports to analyze your sales.

Invoice Register – Summary

This report gives you a list of all the invoices that were created between two dates. You will be able to get all the information wanted about each invoice.

Reservice

This report gives you a list of all the jobs that had to be reserviced during a period of time. For each job, the report gives the reason why it needed to be reserviced and if the job has been reserviced or not.

Sales – Summary

This report gives you a summary of your sales between two dates. The report will give you the total sales before and after rebates, the total sales tax collected and the total number of invoices.

Sales by Category – Detail

This report uses the categories that you had setup in the list of services and generates a list of all the invoices that include this category in their description. For each invoice, you will be able to know what was the amount charged, the name of the customer, the total of the invoice, etc. You will then be able to tell which category of services brings you more income.

Sales by Category – Summary

This report utilizes the categories that you had setup in the list of services and generates a list of what you charged for each category during a period of time. You will then be able to tell which category of services brings you more income.

Sales by customer

This report gives you a list of all the customers that use your services during a period of time. For each customer, the report lists their invoices.

Sales by employee

This report gives you a list of all the employees that worked for you during a period of time. For each employee, the report lists the jobs that they worked on.

Sales by Service – Detail

This report uses the services that you had setup in the list of services and generates a list of all the invoices that include this service in their description. For each invoice, you will be able to know what was the amount and the quantity invoiced, the name of the customer, the total of the invoice, etc.

Sales by Service – Summary

This report utilizes the services that you had setup in the list of services and generates a list of what you charged for each service during a period of time. You will then be able to tell which category of services brings you more income.

Sales by Source – Detail

This report uses the sources that you entered in the job (not in the customer screen) and generates a list of all the invoices and the total amount of money that comes from this source. You will be able to get the detail on each invoice and also the total commission that you owe to this source if you have configured one.

Sales by Source – Summary

This report uses the sources that you entered in the job (not in the customer screen) and generates the total amount of money that comes from each source during a period of time. You will be able to get the total commission that you owe to this source if you have configured one.

Voided Invoice

This report gives you a list of all the invoices that had been voided during a period of time. For each invoice, the report gives you all the details you need to have on the invoice.

Source

The Source reports are generated from the *Initial Source*. This source is located in the customer information under the *More info* tab. Use this initial source to keep track of all your customers that refer your company to new customers. The following reports generate the information about the referrals. **Note:** This report only generates information based on the "Initial Source" that is dependant on existing client referrals.

Job Reference – Detail

This report gives you a list of all the customers that refers other customers. For each one of those customers, you will have the detailed information about each new customer and about the job you did for them.

Job Reference – Summary

This report is a summary of the previous one. It gives you the information about the customer who refer new customers and the number of jobs that were generated from his referrals.

Generating the reports

Generating the reports is probably the easiest task you will have to do in Mistral 2000. The difficulty of this task is choosing the report you need to generate. Here are the steps to generate a report:

1. Click on the **Reports** button in your **Main Menu**.
2. Click on the **Reports** button in the **Reports** submenu.
3. Choose the type of report you want to generate.
4. Select a report in your reports' list
5. Double-click on the report or click on the **Display** button to run the report.

The report appears on the screen using the default display settings or the last settings you configured under the "Setup Report" tab. Each time you generate a report; Mistral 2000 uses a

Mistral 2000 - [Sales by Category - Detail]

File View Window Help

Main Menu Quotations Reports Sales by Category - Detail

Setup report... Filters... Period: 01/09/1999 to 20/09/1999

CYCLEAN
Sales by Category - Detail
 Period: 01/09/1999 to 20/09/1999

Category	Number	Date	Company	Fullname	Total sales	Job Total
Bedroom	6	10/09/1999		Don Estrada	\$60.00	\$273.80
	5	10/09/1999		Andy Auburn	\$56.70	\$364.11
	12	12/09/1999		Gabriella Robin	\$60.00	\$273.80
	20	15/09/1999		Sarah Ross	\$56.70	\$364.11
	16	15/09/1999		Mary Lopez	\$60.00	\$273.80
					\$293.40	
Chair	24	20/09/1999	Bill Wong Restaurants	Bill Wong	\$1,375.00	\$2,178.30
					\$1,375.00	
Commercial Carpet	3	07/09/1999		Sam Donoso	\$240.00	\$254.40
	19	14/09/1999	Pizza Palace	Rose Gagne	\$240.00	\$254.40
	17	16/09/1999		Nigi Frank	\$240.00	\$254.40
	21	17/09/1999		Jody Lam	\$240.00	\$254.40
	24	20/09/1999	Bill Wong Restaurants	Bill Wong	\$80.00	\$2,178.30
	24	20/09/1999	Bill Wong Restaurants	Bill Wong	\$200.00	\$2,178.30
	24	20/09/1999	Bill Wong Restaurants	Bill Wong	\$400.00	\$2,178.30
					\$1,640.00	
Dinning room	13	01/09/1999		Holly Quercia	\$66.00	\$274.43
	13	01/09/1999		Holly Quercia	\$33.00	\$274.43
	2	08/09/1999		Pat Kim	\$31.50	\$254.35
	1	08/09/1999	Green Diamond	David Palle	\$66.00	\$274.43

Ready Page 1/3

default period that equals to the first day of the month until today. Refer to the next sections to learn how to modify the look and the information inside the report.

Setting up the filters

The filters are the tools used to modify the information inside the report in order to get exactly you need. For instance, the period is a filter. Mistral 2000 generates all reports using a default period, but it might not be the period you want. You can then use the filters to modify the period and get the report wanted.

Mistral 2000 lets you define a lot of filters. To be able to define a filter, you need to know what information you are really looking for. After that, you will have to choose which filter you need to set up in order to get the report you are looking for.

You can setup up to seven types of filters:

Customer1

Define criteria on the basic customer information. Use this filter to create a report on only a portion of your customers' list. For instance, you would use this filter to create a sales report on only one customer.

Customer2

Define criteria on alternative customer information like the initial source or the custom fields. Use this filter to create a report on only a portion of your customers' list. For instance, you would use this filter to create a list of all the customers that were last served in September last year.

Site

Define criteria on the site information. Select only a portion of your customers' list. Use this filter, for instance, to get a report on all the jobs your company did in a particular city or for a particular site.

The 'Report Filters' dialog box is shown with the 'Site' tab selected. The 'Employee' tab is also visible. The 'Filters' sub-tab is active. The 'Selected site' field is highlighted in green and contains the text '< Get site ... >'. Below this, there are several filter criteria: 'Company between' and 'Last name between' both have empty text boxes. 'Address 1 containing' has an empty text box. 'City between' has a dropdown menu with 'Chandler' selected. 'State between' has an empty text box. 'Zip code between' has an empty text box. 'Custom field 1 =', 'Custom field 2 =', 'Custom field 3 =', 'Custom field 4 =', and 'Custom field 5 =' all have empty text boxes. The 'OK' and 'Cancel' buttons are at the bottom right.

Job

Define your job criteria and select the ones you want to build the report from. Choose only the report that has *Yellow Pages* as a source for instance.

The 'Report Filters' dialog box is shown with the 'Job' tab selected. The 'Employee' tab is also visible. The 'Filters' sub-tab is active. The 'Number between' field has '1' in the first box and '126' in the second box. 'Work order date betw' has empty text boxes. 'Scheduled date betw' has empty text boxes. 'Total between' has empty text boxes. 'Source between' has a dropdown menu with an empty selection. The 'OK' and 'Cancel' buttons are at the bottom right.

Employee

Define your employee criteria to generate a report on only a portion of your employees' list. For instance, use this filter to generate a commission report on only one employee.

The 'Report Filters' dialog box is shown with the 'Employee' tab selected. The 'Service' and 'Payment' tabs are also visible. The 'Filters' sub-tab is active. The 'Selected employee' field is highlighted in yellow and contains the text 'Eduardo, Sanchez'. Below this, there are several filter criteria: 'Number between' has empty text boxes. 'Last name between' has empty text boxes. 'Type =' has a dropdown menu with an empty selection. 'Comm. inf. sales betw' has empty text boxes. 'Comm. add-on betw' has empty text boxes. 'Test =' has a dropdown menu with an empty selection. 'Custom field 2 =' and 'Custom field 3 =' have empty text boxes. The 'OK' and 'Cancel' buttons are at the bottom right.

Service

Define your service criteria to obtain a report generated on a portion of all your services. You will be able to select only one or a part of your services by configuring your service filter. Choose all the services included in one category for instance.

The screenshot shows the 'Report Filters' dialog box with the 'Service' tab selected. The 'Filters' tab is also visible. The 'Employee' tab is selected under the 'Filters' section. The 'Service' section has the following fields: 'Category between' with 'Bedroom' in the first box and 'Bedroom' in the second box, 'Service name between' with empty boxes, 'Supplier =' with a dropdown arrow, 'Custom Field 2 =' with an empty box, and 'Custom Field 3 =' with an empty box. The 'OK' and 'Cancel' buttons are at the bottom right.

Payment

Define your payment criteria to obtain a report generated on a portion of all your payment types.

Once you define a filter, each time you will generate the report, Mistral will use the filters you defined the last time you generated that report. That way, you won't have to define the filters again and again.

Mistral also provides a window that lets you set "on" or "off" the filters.

The screenshot shows the 'Report Filters' dialog box with the 'Payment' tab selected. The 'Filters' tab is also visible. The 'Employee' tab is selected under the 'Filters' section. The 'Payment' section has the following fields: 'Name between' with 'Discovery' in the first box and 'Discovery' in the second box, 'Date between' with empty boxes, and 'Amount between' with empty boxes. A dropdown menu is open for the 'Name between' field, showing a list of payment types: Amex, Cash, Cheque, Discovery, Master Card, and Visa. The 'OK' and 'Cancel' buttons are at the bottom right.

Filters window

This tool allows you to tell Mistral if it will use or ignore the filters. When should you use this feature? Here is a good example. Let say, you defined a filter in the *Sales by customer* report to select only your residential customers. Each time you generate this report, Mistral does it only on the residential customers as it is set in the filters. But, it might happen that you want to have the same report on all types of customers. Instead of going in the *Customer* filter and remove the filter you configured, you just have to go in the *Filters* window and set to "off" the customer filter. Mistral would then ignore the Customer filter and generate a report on all the customers.

The screenshot shows the 'Report Filters' dialog box with the 'Filters' tab selected. The 'Employee' tab is selected under the 'Filters' section. The 'List of filters:' section contains a list of checkboxes: 'Use customer filter', 'Use site filter', 'Use job filter', 'Use employee filter', 'Use service filter', and 'Use payment filter'. All checkboxes are checked. The 'OK' and 'Cancel' buttons are at the bottom right.

Using the filters

In Mistral 2000 each report has its own filters. If you setup a filter for one report (Sales by employee, for instance) this filter will only apply to this report.

NOTE: Like we told you earlier, when you configure the filters for a report, Mistral will remember them the next time you will run the report. The only filter that Mistral will not remember is the period. Here is an example on how to use the filters in a report.

First step: Generate the report wanted. In this case, we want to generate a report that gives me my Sales by employee.

1. In the report window, click on **Sales**.
2. In the list of reports, double-click on **Sales by Employee**.

The report appears on the screen.

Fullname	Type		Job Total	Company	Fullname
Number	Date				
Eduardo Sanchez	Clean Tech				
1	08/09/1999		\$274.43	Crown Diamond	David Polls
4	09/09/1999		\$274.43		Jennifer Pontes
8	09/09/1999		\$254.35		Sue Hamblin
6	10/09/1999		\$273.80		Don Estrada
12	12/09/1999		\$273.80		Gabriella Robin
10	12/09/1999		\$254.19		Michael Marcelli
14	14/09/1999		\$274.43		Joana Mc Arthy
20	15/09/1999		\$364.11		Sarah Ross
16	15/09/1999		\$273.80		Mary Lopez
22	16/09/1999		\$210.83		Allan Wirtz
			\$2,728.17		
James Forgyaty	Clean Tech				
13	01/09/1999		\$274.43		Holly Quercia
3	07/09/1999		\$254.40		Sam Donoso
18	14/09/1999		\$254.35	Mike's	Don Norman
19	14/09/1999		\$254.40	Pizza Palace	Rose Gagne
17	16/09/1999		\$254.40		Nigi Frank
			\$1,291.98		
John Smith	Clean Tech				
2	08/09/1999		\$254.35		Pat Kim
9	10/09/1999		\$254.19		Bob Sien
5	10/09/1999		\$364.11		Andy Auburn
7	11/09/1999		\$254.19		Tamy Jalil
11	12/09/1999		\$210.83		Angie Pexi
15	15/09/1999		\$254.35		Daniele Mollino
21	17/09/1999		\$254.40		Jody Lam
23	20/09/1999		\$210.83		Michele Brown
			\$2,057.25		
			\$6,077.40		

Mistral 2000 made a report that is showing all my employees with a list of all the jobs (invoices) they worked on. As default, Mistral is making this report on all the jobs that were invoiced between September 1st and today (September 20th).

Now, that is not exactly the report I am looking for. I would like to have this report only for Eduardo Sanchez and only for jobs invoiced between September 1st and September the 14th. I will have to use the filters in order to get the result that I want.

Second step: Configure the Employee filter to keep only Eduardo Sanchez.

1. Click on the **Filters...** button.
2. Click on the **Employee** tab. You now have to enter your selection criterion.
3. It's very easy to select only one employee. Click on the **Get employee field** and **choose** Eduardo Sanchez in the list of employee.
4. Click **OK**, when finished.

Mistral automatically applies the filter and removes all other employees from the report.

Fullname	Type				
Number	Date	Job Total	Company	Fullname	
Eduardo Sanchez	Clean Tech				
1	08/09/1999	\$274.43	Crown Diamond	David Polls	
8	09/09/1999	\$254.35		Sue Hamblin	
4	09/09/1999	\$274.43		Jennifer Pontes	
6	10/09/1999	\$273.80		Don Estrada	
12	12/09/1999	\$273.80		Gabriella Robin	
10	12/09/1999	\$254.19		Michael Marcelli	
14	14/09/1999	\$274.43		Joana Mc Arthy	
20	15/09/1999	\$364.11		Sarah Ross	
16	15/09/1999	\$273.80		Mary Lopez	
22	16/09/1999	\$210.83		Allan Wirtz	
		\$2,728.17			
		\$2,728.17			

Third step: Set the period as September 1st to September 14th.

1. In the report window, change the second date to 14/09/99.
2. Click on the button on the right.

Fullname	Type				
Number	Date	Job Total	Company	Fullname	
Eduardo Sanchez	Clean Tech				
1	08/09/1999	\$274.43	Crown Diamond	David Polls	
8	09/09/1999	\$254.35		Sue Hamblin	
4	09/09/1999	\$274.43		Jennifer Pontes	
6	10/09/1999	\$273.80		Don Estrada	
12	12/09/1999	\$273.80		Gabriella Robin	
10	12/09/1999	\$254.19		Michael Marcelli	
14	14/09/1999	\$274.43		Joana Mc Arthy	
		\$1,879.43			
		\$1,879.43			

That's it! You can now print the result or create another report.

Changing the reports' look

Mistral offers different tools to change and customize the information and the layout of the reports. Here are the different changes you can modify on a report.

Changing the information shown in a report

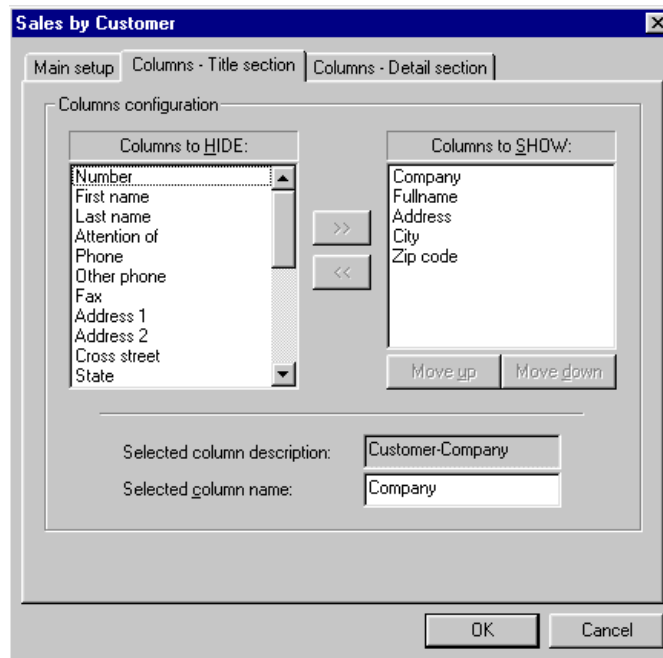
You generated a report and you defined filters to obtain the record or the compilation you were looking for but the report is not showing the information you are looking for. For instance, the *Sales by Source- Detail* report is showing the customer name but not his phone number, and you need to see that information. Thanks to Mistral powerful report module, you can setup the information you can print in each report. This information is configured by clicking on a button called **Setup report...**



Main setup. Use this window to define the period dates, enter a title for the report, choose the information the report uses to sort its information and select the type of job its going to use to generate the report. Note that it is not all those option that are available for each type of report. Those filters change depending on the type of report you create.

Because of the size of the paper, it is sometime impossible to show all the information about an item. As default, Mistral shows the information (or the fields) that we believe are the most important to you. But, we are not always right and maybe there is a very important field that you want to see in the report and it does not show now. The window contains 2 lists. The column on the left contains the fields that are not in the report. Those fields are relevant to the item in the list but are not selected to show in the list. The list on the right contains fields that are showing in the list.

Columns - Title section. Use this window to define the columns that will appear on the report for the title section. Here is example of title section:



To add a column in the list:

1. Select the field in the list of columns to HIDE.
2. Click on the (>>) icon to move the field to the other list.

To remove a column from the list:

1. Select the field in the list of columns to SHOW.
2. Click on the (<<) icon to move the field to the other list.

You can also change the order of the column from this window. The information that is on the top of the list of columns to SHOW is the column that will be in the far left of your item list. So, the information that appears at the end of this list is the column that will appear at the far right of the item list.

To change the order of the columns, select the column to move and press on:

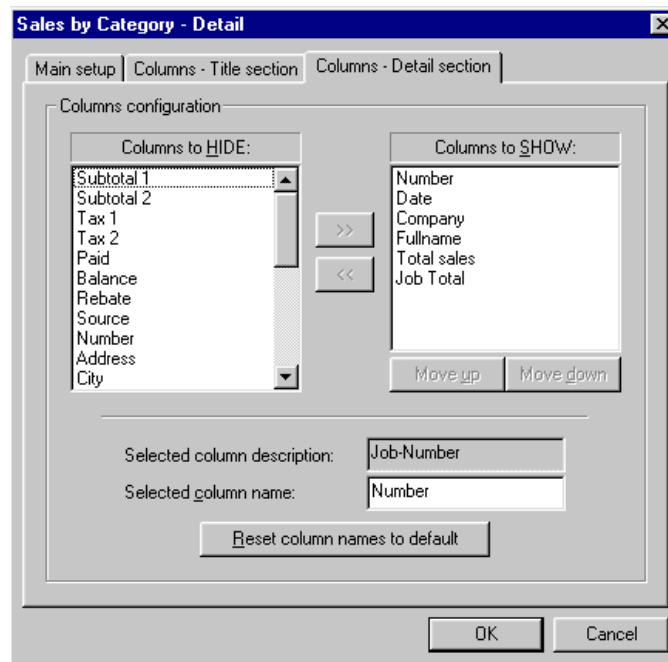
Move up to move the column to the left in your item list.

Move down to move the column to the right in your item list.

To change the name of a column:

1. Select the field name in the list of Columns to show.
2. Type the new name in the *Selected column name* field.

Columns - Detail section. Use this window to define the columns that will appear on the report for the detail section. You will find a detail section in only some reports. Generally, those reports have the word “- Detail” in their name. *Sales by Source - Detail* contains a detail section, *Sales by Source - Summary* does not contain a detail section. Here is an example of detail section:



Use the same procedure as the *Title section* to make changes to your columns in the Detail section.

Changing the column size

Mistral 2000 allows you to change the width of a column directly on the screen. At the top of the report window, you can see blue and yellow dots. Each dot represents a right side column border. The yellow dots delimit the Title section columns and the blue dots the Detail section. If you do not have blue dots on your screen it is because you are not currently viewing a detailed report.

To change a column width:

1. Move your mouse cursor over a dot until it changes shape
2. Click and hold the mouse button and move your mouse to the left or right until you reach the desired size.
3. Release the mouse button.

Category	Number	Date	Company	Fullname	Total sales	Job Total
Bedroom	6	10/09/1999		Don Estrada	\$60.00	\$273.80
	5	10/09/1999		Andy Auburn	\$56.70	\$364.11
	12	12/09/1999		Gabriella Robin	\$60.00	\$273.80
	20	15/09/1999		Sarah Ross	\$56.70	\$364.11
	16	15/09/1999		Mary Lopez	\$60.00	\$273.80
					\$293.40	

Changing the font

You can easily change the font and the font size. This procedure allows you to view more but smaller text or less but bigger text.

Click on

to change:



The font size

The font type

Changing the paper format

You can easily change the paper format. This procedure allows you to view more columns on a page but fewer lines.



Click on this button to choose between Portrait and Landscape.

Viewing the report

Here are the different tools you can use to change the way you are viewing the report.



Move to the previous page (if your report has more than one page).

Move to the next page (if your report has more than one page).

Zoom in.

Zoom out.

View the report, as it will print.

View the whole page length.

View the whole page width.

Preview the page before printing.

Printing the report

The report is generated; you have defined filters and changed the layout of the report to finally obtain the report you were looking for. If you want, you can now print the result. The printed result will look exactly like what you currently have on your screen.



Click on this button to print the report.

Exporting the report

This feature is made for advance users. It allows you to save the report in a text file. You will then be able to use an electronic datasheet program (Excel, for instance) to open the report and modify its contents to get more detailed information.



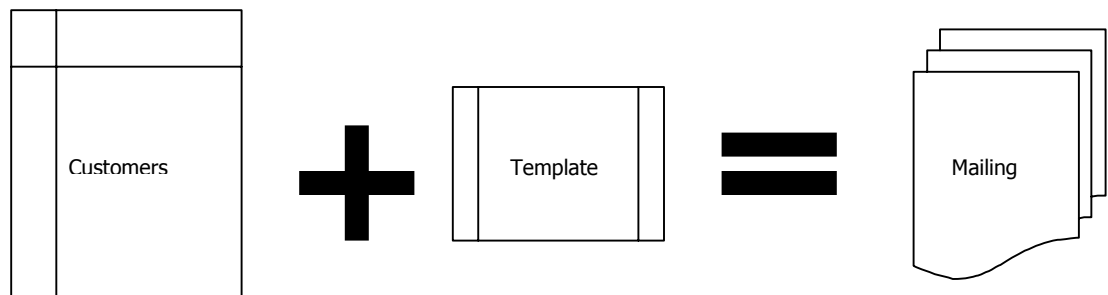
Click on this button to save the report in a text file.

Mail merge

What is a mail merge?

The mail merge is a new and improved feature in Mistral 2000. The mail merge allows you to create all kinds of mailing labels, personalized letters, envelopes and postcards, etc. The mail merge is a great tool to make you save a lot of time and money and also to improve your image.

The Mistral 2000 mail merge is so good that you do not need to use any other program. You can do absolutely everything from Mistral 2000. In Mistral, you can find two types of mail merge. There is a mail merge that you can create from a list or a mail merge that you can create from the Mail Merge module. Refer to the Chapter 4 to learn how to create a mail merge from a list. In this section, we will show you how to create a mail merge from the Mail Merge module. Here is the general principle of a mail merge:



You need two entities to create a mail merge. A list of information and a template (label, envelop, letter, etc.). The template contains fields that will be replaced by the customer information when we will merge the two entities together. A mail merge will create as many mailing items as there are items in the list of customers. For instance, if you have 100 customers in your list and you decide to merge this list with a label template, the results will be 100 personalized labels. So, the list + the template = to the mailing.

Defining a mail merge

When you are creating a mail merge from the customers' list, Mistral uses the list you are viewing and merge it with a template. When you are creating a mail merge from the Mail Merge module, you need to define a list of customer to which you want to send your mailing. This step is accomplished by defining criteria in the Mail Merge window.

The screenshot shows the 'Mail Merge' dialog box. It has a title bar with 'Mail Merge' and a close button. The dialog is divided into several sections. The top-left section is titled 'Do mail merge on the [Customers List] with criteria on [Jobs]' and contains a 'Period' field with '9/1/1999' to '9/20/1999', radio buttons for 'Quotations', 'Work orders', and 'Invoices' (with 'Invoices' selected), a 'Sort by' dropdown set to 'Number', and a 'Filters...' button. The top-right section is titled 'Do mail merge on the [Customers List] with criteria on [Balance]' and contains fields for 'Balance >= \$0.00', 'Unpaid jobs >= 1', 'Purchased >= \$0.00', 'Total jobs >= 1', and 'Job date <= 9/20/1999', along with a 'Sort by' dropdown set to 'Number' and a 'Filters...' button. The bottom-left section is titled 'Do mail merge on the [Customers List] with criteria on [Callbacks]' and contains a 'Sort by' dropdown set to 'Number' and a 'Filters...' button. At the bottom, there is a checkbox labeled 'Use only mail merge customers' which is checked, and 'OK' and 'Cancel' buttons.

The Mail Merge window contains three sections. Each section represents a main criterion. Select one of those main criteria allows you to obtain the list of customers that you want to send your mailing to. If you need to define other filters to reduce your mailing list, you can click on the Filters button and define other criteria. Refer to the previous section to learn more on the filters.

All of the 3 criteria screens have one common element. The "*Use only mail merge customers*" check box. This check box will filter out only the clients that you have selected as "Included in mail merge" within the customers information screen. This filter has been added to the main screen as it is the most used.

Press OK once you have defined all your criteria.

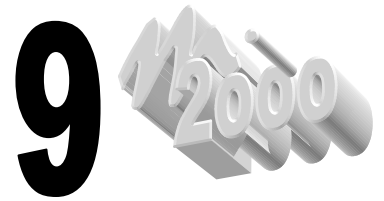
Print the mail merge

You have now completed the first step of your mail merge. Now, you need to decide which mailing template you will use in this mailing. Select it from the list and Click OK. You will have to create mailing templates if you have not defined any. Refer to chapter 10 to learn how to create the templates.

When you will press on the Merge button, Mistral 2000 is going to use all the customers that fit your criteria, to create the mail merge. The mail merge will first appear on the screen. You just have to click on the Print button to print it.

CHAPTER 9

Exporting your data



The purpose of exporting

Mistral 2000 is business software designed to help you manage your service company. But, Mistral 2000 is not designed to do your accounting. We believe that there is already very good accounting software on the market right now and that there is no reason for us to reinvent the wheel. So, we focused on building a software package with tools and features that you will not find in accounting software and we made the connection possible between the most popular accounting software and us.

The exportation to accounting software allows you to simplify your accounting. You will be able to put all your income, expenses and payroll information in one system and generate reports and other information for your accounting.

What can Mistral 2000 export?

Mistral 2000 is a partially a billing program. It is used to create invoices and to accept payments. And this is the information that we need to export to the accounting software. The exportation is done through using a file we call the Journal.

The Journal

The Journal is a file created by Mistral 2000 and it contains the transactions done on the accounts inside the system. Those transactions are sales, payments and credit transactions. The Journal file is used for one thing: it allows you to transfer the transactions done on this system to your accounting system.

Presently, this Journal can be import by four accounting software packages. If you are not currently using one of the four systems listed in the Export Ledger window, or have not set up your Account List in the general Ledger within Mistral you will not be able to use the Export feature of Mistral 2000.

The Journal is not essential, though, it only help you to make the transfer easily. If you want, you can make the transfer manually (E.I. to write manually all the transactions done on your accounts in this system into your accounting system by taking values from the accounting reports).

Important. Do not forget to define an account number for each one of your services. Refer to the Chapter 3 to learn how you can create your accounts and how to link accounts to your services. The account numbers are mandatory in setting up your accounts in Mistral 2000. You can just use dummy ones in Mistral if you don't use account numbers in your accounting software.

Exporting to Accounting software

If you are currently using an accounting program or if you think about using one, you need to set up Mistral and tell it which software you will use.

To choose an accounting program

1. In the Main menu, click on **General Ledger**.
2. In the General Ledger menu, click on **Export Ledger**.
3. In the Choose your accounting software section, click beside the desired system.

How to export

Setting up your Export Ledger

Before you export your transaction into the journal, you have to make sure that you have setup Mistral properly. Here is the window that you need to configure. This window contains description of accounts that we normally find in the accounting software. For each one of those accounts, you need to enter the account number you are using in Mistral 2000 to describe this account.

If you can not find the account in your list, you will have to create one.

Before trying to export make sure that:

- You associated all your services to an account number
- You configured your exportation (section above)
- You chose an accounting software.

Exporting the invoices

1. From the **Main Menu**, click on the **General Ledger** button.
2. In the **General Ledger** submenu, click on the **Export Ledger** button.
3. In the *Export invoices* section, enter the number of the first invoice to export.
4. Then, enter the number of the last invoice to export.
5. Click on the **Export** button.

Exporting the payments

1. From the Main Menu, click on the **General Ledger** button.
2. In the **General Ledger** submenu, click on the **Export Ledger** button.
3. In the *Export invoices* section, enter the date of the first payment to export.
4. Then, enter the date of the last payment to export.

5. Click on the **Export** button.

How to import into accounting software

Mistral 2000 is currently able to export its data to four accounting software packages: QuickBooks (or QuickBooks pro), Peachtree accounting, MYOB Accounting and Simply accounting. This section will show you how to import, the journal that Mistral 2000 creates into each program.

Don't forget to configure these programs before exporting data. The exportation will not work properly if you have not created your chart of accounts.

NOTE: *This chart of accounts needs to have the same account numbers and exactly the same account description than the accounts used in Mistral 2000. That means that account names must have the same "spaces", "Cases" and "Exact spelling" In order for the Import to work correctly. You will only have to enter only the accounts that are relevant to Invoicing and Payments into Mistral 2000.*

****WARNING****

ALWAYS CREATE A BACKUP OF YOUR ACCOUNTING PACKAGE DATA BEFORE ATTEMPTING TO DO YOUR FIRST IMPORT!

QuickBooks

Here are the steps you have to follow to import the transactions from Mistral 2000 to QuickBooks. Do not forget to make a backup of your QuickBooks data before you import the new journal.

NOTE:

1. Sales Tax must be set to "Off" within the preferences of QuickBooks for the journal to import.
2. If you complete the import and you appear to have new accounts that have been created and have a "type" as "Bank" that normally means that an account name was spelled incorrectly

Steps to Importing

1. Open QuickBooks.
2. In the menu, click on **File** and choose **Import...**
3. In the Import window, open the file **Sales.iif** (or Payments.iif, if you are importing the payments) located in the folder **Company Data_** of the folder **Mistral 2000**.
4. Click **Ok**.

Follow the same steps to import the payments

Peachtree accounting

Here are the steps you have to follow to import the transactions from Mistral 2000 to Peachtree. Do not forget to make a backup of your Peachtree data before you import the new journal.

Importing the customers

1. Open Peachtree accounting.
2. In the menu, click on **File** and choose **Select Import/Export...**
3. In the Select Import/Export window, choose **Accounts Receivable** on the left and choose **Customer List** on the right.
4. Click on the Import Button.
5. Click on the Fields tab and select only those fields:
 - Customer ID
 - Customer Name
 - Bill to Address-Line One
 - Bill to Address-Line Two
 - Bill to City
 - Bill to State
 - Bill to Zip Code
 - Customer Type
 - Telephone 1
 - Telephone 2
 - Fax Number
6. Click on the Options tab and check **First Row Contains Heading**.
7. Click on the button to the left of the file name (C:\CUSTOMER.CSV) and find the file Customer.csv located in the folder **Company Data_** of the folder **Mistral 2000**. Typically located in "C:\Mistral 2000\Company Data_\
8. Click **Ok**.

Importing the sales

1. In the menu, click on **File** and choose **Select Import/Export...**
2. In the Select Import/Export window, choose **Accounts Receivable** on the left and choose **Sales Journal** on the right.
3. Click on the Import Button.
4. Click on the Fields tab and select only those fields:
 - Customer ID
 - Invoice #
 - Date
 - Customer PO
 - Date Due
 - Discount Amount
 - Discount Date
 - Accounts Receivable Account
 - Number of Distributions
 - Quantity
 - Description
 - G/L Account
 - Unit Price
 - Tax Type
 - Amount
 - Sales Tax Authority
5. Click on the Options tab and check **First Row Contains Heading**.

6. Click on the button to the left of the file name (C:\SALES.CSV) and find the file Sales.csv located in the folder **Company Data_** of the folder **Mistral 2000**. Typically located in "C:\Mistral 2000\Company Data_\
7. Click **Ok**.

Importing the payments

1. Open Peachtree accounting.
2. In the menu, click on **File** and choose **Select Import/Export...**
3. In the Select Import/Export window, choose **Accounts Receivable** on the left and choose **Customer List** on the right.
4. Click on the Import Button.
5. Click on the Fields tab and select only those fields:
 - Customer ID
 - Reference
 - Date
 - Payment Method
 - Cash Account
 - Total Paid on Invoice(s)
 - Discount Account
 - Number of Distributions
 - Invoice Paid
 - Discount Amount
 - G/L Account
 - Amount
6. Click on the Options tab and check **First Row Contains Heading**.
7. Click on the button to the left of the file name (C:\RECEIPTS.CSV) and find the file Receipts.csv located in the folder **Company Data_** of the folder **Mistral 2000**. Typically located in "C:\Mistral 2000\Company Data_\
8. Click **Ok**.

MYOB accounting

Here are the steps you have to follow to import the transactions from Mistral 2000 to MYOB. Do not forget to make a backup of your MYOB data before you import the new journal.

Open MYOB accounting.

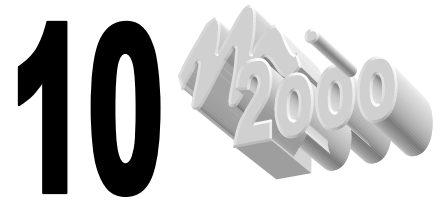
1. In the menu, click on **File** and choose **Import Data**
2. In the Import Data menu, choose **General Journal Entries**.
3. In the Import **General Journal Entries** window, select **Comma-separated and Header Record**, then click **Continue**.
4. Open the file **Sales.txt** (or Payments.txt if, if you are importing the payments) located in the folder **Company Data_** of the folder **Mistral 2000**. Typically located in "C:\Mistral 2000\Company Data_\
5. Click **Ok**.
6. In the **Import Data** window, match the fields on the left to the field on the right. First click on the field on the left (DATE, for instance) and Click on the corresponding field on the right (Date:). Repeat this process for all the fields.
7. Click on the **Import** Button.

Follow the same steps to import the payments

Simply Accounting

Call for Support

CHAPTER 10



Templates, labels and letters

What are the templates

With Mistral, you can create six types of templates and, you can create an infinity number of templates of each type. You want to create five types of labels, ten personalized letters, three types of invoices, one type of envelope and five different brochures, and twelve kind of business cards... no problem, you will be able to create and store all the templates with Mistral 2000. You do not need to use the ones included with Mistral. Those are only examples that CAN be used if so desired.

The templates are the tools that Mistral 2000 uses to print your invoices, labels, envelopes, personalized letters, business cards and brochures. It is a way for you, the user, to tell Mistral how you want to print those forms. When creating a template, you tell Mistral what information to print and where to print it.

Types of templates

Mistral 2000 has six different types of templates.

Envelope

Choose this type to create an envelope template. Mistral has a complete list of envelope sizes in its database. Choose the size wanted and put your information on it.

Label

Choose this type to create address, diskette, audio cassette labels or if you want to create business cards. Mistral 2000 has a listing of all the Avery labels. You will also be able to customize your own label.

Letter

Choose this type to create personalized letters. You will be able to use this template when creating a mail merge. You can put "fields" in the template that will be replaced by the customer information once merged.

Sheet

Choose this type to create a general type of template like inside memo or fax cover sheet.

Brochure

Choose this type to create your company pamphlets or brochures. Mistral has a built-in list of different kinds of brochures you can create.

Invoice

Choose this type to create your templates for the jobs. It is very important for you to create a template; without the template, Mistral 2000 cannot print your quotations, work orders or invoices. Use the Template editor and create your own invoice with an image that will reflect your company.

Setting up your Invoice Templates

We will start by showing you how to build your invoice template. If you understand how to build this type of template, you will understand how to create the other types. The next sections will show you all of the other types that we are not showing you in this section.

When creating an invoice template, you create everything that appears on an invoice when you print it. If you already have pre-printed invoices, this task will be simple. If you print on blank paper, then you will need to create all the elements of the invoice. We did include some examples of templates within the software; you can use, modify and copy them.

What do we find in an invoice template

Here are the objects that we find in an invoice template

The image shows a screenshot of a Cyclone J-Type invoice form. The form includes a header section with the Cyclone logo and address, a section for Date and Number, a section for Customer and Site, and a table for Description, Quantity, Unit cost, and Extended. The form is annotated with various geometric shapes and labels:

- Ellipse:** Points to a yellow oval shape in the top left corner.
- Text Box:** Points to the Cyclone logo.
- Rectangle:** Points to a yellow rectangular shape in the top left corner.
- Field:** Points to a text input field for the Customer name.
- Line:** Points to a horizontal line separating the table from the footer.
- Rectangle with round corners:** Points to a yellow rectangular shape in the bottom left corner.

Description of the objects

Line. Object normally used to separate sections within the template. You can draw lines of different color and size.

Rectangle. Object normally used to create a section or to separate section in the template. You can also use the rectangle to decorate your invoice. You can draw rectangles of different colors and sizes.

Rectangle with round corners. Object normally used to create a section or to separate section in the template. You can also use the rectangle with round corners to decorate your invoice. You can draw a rectangle with round corners of different colors and sizes.

Ellipse. Object normally used to create a section. You can also use the ellipse to decorate your invoice (like in the figure 2.x). You can draw an ellipse of different colors and sizes.

Text box. Object used to write text on the template. Normally used to describe the information or create field headers (Date, customer, and site) or to write the company information (name and address). You can write text of different sizes and color

Picture. Object normally used to insert your company logo. (Must be in BMP "Bitmap" format)

Field. Object used to write the invoice information (customer, site, date, and description). This is the only object that the template must contain. The fields are represented by variables (Full name, for instance) and will be replaced by its real value when you will create the invoice.

How to create a new template

1. In the list of templates, click on the **New** button.
2. In the **Template description** window, Type the name of the template and any optional comments, then press **Tab**.
3. Type description (optional).
4. When finished, click **Next**.
5. In the **Template type** window, click Invoice and click **Next**.
6. In the **Invoice option** window, choose the size, click and press **Tab**.
7. Press **Tab** again.
8. Choose an initial invoice layout (optional), click **Finish**.

The objects of a template

The Template creation window appears empty or with an initial layout depending on the last choice you made. Here are the tools Mistral 2000 offers you to build your template:

Choose _____ to _____



Line

Draw a line



Rect

Draw a rectangle



Round

Draw a rectangle with round corner



Ellipse

Draw an ellipse



Text

Insert a text box



Picture

Insert a picture



Field

Insert a field



Select

Select an object

To add and modify an object in the template

The white part of this window represents the paper. The size of the white area equals to the size of the paper you chose earlier when you created the template. The dotted squares are 1/2inch by 1/2inch. Here are the steps to add each kind of object.

To add a Line

1. Click on the **Line** button.
2. Move your mouse over the working area (in white). Your cursor will then change shape.
3. Click and hold the mouse button. This is where the line begins.
4. Move your mouse until you reach the point where you want your line to stop.
5. Release the mouse button.

If you hold the <**Shift**> button when you are in step four; the line will only take a 45° angle.

To move the Line

1. Move your mouse over the line (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the line) to its new location.

To change the size or the direction of the Line

1. Move your mouse to one of the extremity of the line (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the extremity) to its new location.

To add a Rectangle

1. Click on the **Rectangle** button.
2. Move your mouse over the working area (in white). Your cursor will then change shape.
3. Click and hold the mouse button. This is where a corner of the rectangle will be.
4. Move your mouse (in diagonal) until you reach the point where you want to put the opposite corner.
5. Release the mouse button.

If you hold the <**Shift**> button when you are in step four; the rectangle will only take a perfect square shape.

To move the Rectangle

1. Move your mouse over the rectangle (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the rectangle) to its new location.

To change the size of the Rectangle

1. Move your mouse to one of the corner or side of the rectangle (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the side of the rectangle) to its new location.

To add a Rectangle with round corners

1. Click on the **Round** button.
2. Move your mouse over the working area (in white). Your cursor will then change shape.
3. Click and hold the mouse button. This is where a corner of the rectangle will be.
4. Move your mouse (in diagonal) until you reach the point where you want to put the opposite corner.
5. Release the mouse button.

If you hold the <**Shift**> button when you are in step four; the rectangle will only take a perfect square shape.

To move the Rectangle with round corners

1. Move your mouse over the rectangle (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the rectangle) to its new location.

To change the size of the Rectangle with round corners

1. Move your mouse to one of the corner or side of the rectangle (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the side of the rectangle) to its new location.

To change the shape of the Rectangle with round corners

1. Move your mouse to the blue square inside the rectangle (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse until you reach the desire shape.

To add an Ellipse

1. Click on the **Ellipse** button.
2. Move your mouse over the working area (in white). Your cursor will then change shape.
3. Click and hold the mouse button. This is where a corner of the ellipse will be.
4. Move your mouse (in diagonal) until you reach the desired size and shape.
5. Release the mouse button.

If you hold the <**Shift**> button when you are in step four; the ellipse will only take a perfect circle shape.

To move the Ellipse

1. Move your mouse over the ellipse (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the ellipse) to its new location.

To change the size of the Ellipse

1. Move your mouse to one of the corner or side of the ellipse (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse until you reach the desired shape.

To add a Text box

1. Click on the **Text box** button.
2. Move your mouse over the working area (in white). Your cursor will then change shape.
3. Click and hold the mouse button. This is where a corner of the text box will be.
4. Move your mouse (in diagonal) until you reach the point where you want to put the opposite corner of the text box.
5. Release the mouse button.

If you hold the <**Shift**> button when you are in step four; the text box will only take a perfect square shape.

To move the Text box

1. Move your mouse over the text box (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the text box) to its new location.

To change the size of the Text box

1. Move your mouse to one of the corner or side of the text box (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the side of the text box) to its new location.

To edit the text of a text box

1. Once the box is made, click on the text (Type text here).
2. A blinking cursor then appears. Delete the text and type the text you want to enter.
3. You can type one word or a complete paragraph if you want.
4. Change the shape of the box to fit with your text.

Refer to the section Object properties to learn how to change the font, the color and the size of the text box or of the font.

To add a Field

A field is exactly like a text box. The only difference is that you can't change the text it contains.

1. Click on the **Field** button.
2. Move your mouse over the working area (in white). Your cursor will then change shape.
3. Click and hold the mouse button. This is where a corner of the field box will be.
4. Move your mouse (in diagonal) until you reach the point where you want to put the opposite corner of the field box.
5. Release the mouse button.

If you hold the <**Shift**> button when you are in step four; the field box will only take a perfect square shape.

To move the Field

1. Move your mouse over the Field box (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the Field box) to its new location.

To change the size of the Field

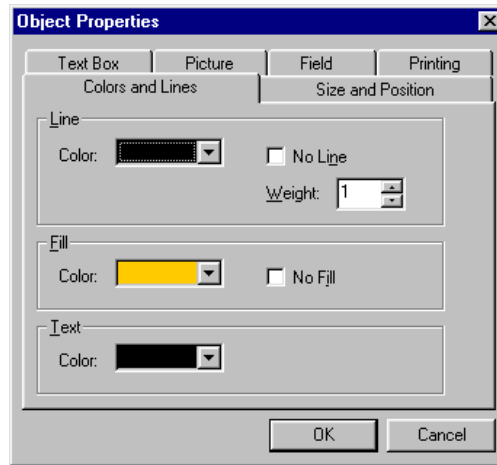
1. Move your mouse to one of the corner or side of the field box (the cursor takes a new shape).
2. Click and hold the mouse button.
3. Move your mouse (and the side of the field box) to its new location.

Refer to the section Object properties to learn how to change the font, the color and the size of the Field box or of the font.

The Object properties

Every object of a template has its own properties. The properties define, for instance, the color and the thickness of a line. In this section, you will learn how to change the properties of every object we find in a template.

Mistral 2000 uses the same type of window to set up the properties of every object. This window contains six sections. Some sections of the Object properties window only apply to certain objects. The line, for instance, only uses the sections *Color and Lines*, *Size and Position* and *Printing*. The other sections are not applied to this object.



Color and Lines.

Use this section to set up the color of the object. You can also use this section to change the weight (thickness) of a line or a border.

Size and Position. Use this section to change the size of an object and its position on the sheet.

Text box. Use this section to set up the margins inside a text box and to change the font, the font size and the font style.

Picture. Use this section to select the file containing the picture.

Field. Use this section to change the field.

Printing. Use this section to enable or disable the printing of the object. "Object will appear on your screen but will not print"

The properties of a Line

Color and Lines

- Change the **Line** color to change the color of the line.
- Change the **Weight** to change the thickness of the line.

Size and Position

- Change the **horizontal** and **vertical** position to set up the starting point of your line.
- Change the **width** and the **height** (difference between the 2 extremities).

Text box

- Does not apply.

Picture

- Does not apply.

Field

- Does not apply.

Printing

- Check if you want the line to show on the screen and print on the paper. If the check box is empty, the line will show on the screen but will not print.

The properties of a Rectangle, Rectangle with round corners and Ellipse

Color and Lines

- Change the **Line** color to change the color of the border.
- Change the **Weight** to change the thickness of the border.
- Check **No line** to remove the border.
- Change the **Fill** color to change the color of the fill.
- Check **No fill** to remove the fill.

Size and Position

- Change the **horizontal** and **vertical** position to set up the upper corner of your object.
- Change the **width** and the **height** to change the size of your object.

Text box

- Does not apply.

Picture

- Does not apply.

Field

- Does not apply.

Printing

- Check if you want the object to show on the screen and print on the paper. If the check box is empty, the object will show on the screen but will not print.

The properties of a Text box

Color and Lines

- Change the **Line** color to change the color of the border.
- Check **No line** to remove the border.
- Change the **Weight** to change the thickness of the border.
- Change the **Fill** color to change the color of the fill.
- Check **No fill** to remove the fill.
- Change the **Font** color to change the color of the font.

Size and Position

- Change the **horizontal** and **vertical** position to set up the upper corner of your text box.
- Change the **width** and the **height** to change the size of your text box.

Text box

- Change the Internal margin to set up the space between your text and the border of your text box.
- Check **Center text vertically** if you want center your text and have the same space over and under your text.
- Click on the **Font Dialog** button to change the font, the font style and the font size.

Picture

- Does not apply

Field

- Does not apply

Printing

- Check if you want the text box to show on the screen and print on the paper. If the check box is empty, the text box will show on the screen but will not print.

The properties of a Picture

Color and Lines

- Does not apply

Size and Position

- Change the **horizontal** and **vertical** position to set up the upper corner of your picture.
- Change the **width** and the **height** to change the size of your picture.

Text box

- Does not apply

Picture

- Click on the **Change picture** button to go and get another picture and replace this one.
- Click on the **Reload picture** button to re-insert the picture as it was originally.

Field

- Does not apply

Printing

- Check if you want the text box to show on the screen and print on the paper. If the check box is empty, the text box will show on the screen but will not print.

The properties of a Field

Color and Lines

- Change the **Font** color to change the color of the font.

Size and Position

- Change the **horizontal** and **vertical** position to set up the upper corner of your field.
- Change the **width** and the **height** to change the size of your field.

Text box

- Click on the **Font Dialog** button to change the font, the font style and the font size.

Picture

- Does not apply

Field

- Click on the **Change Field** button to choose another field from the list and replace this one.
- Click on the **More Properties** button to change the properties of the field **J-Lines**. View next section to learn how to modify those properties.

Printing

- Check if you want the field to show on the screen and print on the paper. If the check box is empty, the field will show on the screen but will not print.

The properties of the field J-Lines

The fields J-lines are different from all the others. It's this field that will be replaced by the description of the work when you will build your invoice. Here what a description line looks like:

In this line we find 5 columns:

- The category (Residential Carpet Cleaning)
- The service (3 rooms special)
- The quantity (1.00)
- The cost (75.00)
- The price (75.00)

To set up the **J-lines field**, you need to tell Mistral 2000 what information you want see on this line, the width of each column, the name of each column, etc. Here's how this example look like in

Description			Extended	
Residential Carpet cleaning - 3 rooms special			1.00	\$75.00

the template.

Description			Extended	
Description	Quantity	Unit cost	Extended	
Description	Quantity	Unit cost	Extended	
Description	Quantity	Unit cost	Extended	

How to set up J-Lines

1. In the **Object properties** window, click on the **Field** tab.
2. Click on the **More Properties** button.

The **Job Lines Setup** window appears

The screenshot shows the 'Job Lines Setup' window with the 'Main options' tab selected. It features a table for configuring columns and their widths.

Column	Content	Column width (1/100th inch)
Column 1:	Category+service	500
Column 2:	Quantity	75
Column 3:	Unit cost	75
Column 4:	Extended	100
Column 5:	None	0
Column 6:	None	0
Column 7:	None	0
Column 8:	None	0
Column 9:	None	0
Column 10:	None	0

Buttons: OK, Cancel

Main options section

This window contains 2 sections. In the first section (Main option) you will choose the information you want to print on the invoice and the size of each column. If we look in the figure above the columns shown were **Description**, **Quantity**, **Unit Cost** and **Extended**.

To set it up that way, we chose to put the Category+service in the column 1 and set this column as 5 inches wide (500 X 1/100 inch). And all the other columns as it is in the figure above.

More options section

The screenshot shows the 'Job Lines Setup' window with the 'More options' tab selected. It contains various settings for the invoice layout.

Number of lines: 20

Space between columns (1/100th inch): 10

☐ Draw vertical lines

☒ Draw header

☒ Print header

☐ Bold header

Header text: [dropdown]

Header fill: [dropdown]

Title 1: Description

Title 2: Quantity

Title 3: Unit cost

Title 4: Extended

Title 5: [empty]

Title 6: [empty]

Title 7: [empty]

Title 8: [empty]

Title 9: [empty]

Title 10: [empty]

Buttons: OK, Cancel

Use this section to set up these options:

Number of lines. Type here the maximum number of lines that your invoice can contain

Space between columns. Enter here the space you want to leave between the information of each column.













Draw vertical lines. If you check this box, Mistral 2000 will automatically draw vertical lines to separate the columns.

Draw header. If you check this box, Mistral 2000 will automatically create a header for your column.

- Check "Print header" if you want to see the header on the screen and if you want to print it on the paper.
- Check "Bold header" if you want to have the text in the header in bold
- Choose the color of the text in Header text.
- Choose the header background color in Header fill.
- Type the name of the column headers in the fields "title 1" to "title 10".

You will also find tools to modify the look of your object.

Choose	To
--------	----

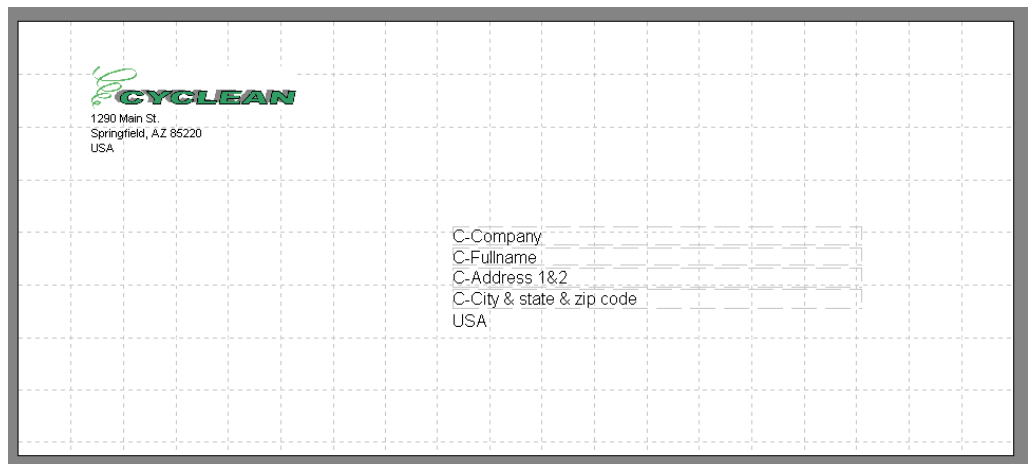
	Select a font
	Select a font Size
	Select a line color
	Select a fill color
	Select a font color
	To view the object properties
	To put the text in bold
	To put the text in italic
	To underline the text
	To align the text on the left
	To center the text
	To align the text on the right

Setting up your Envelope Template

How to create a new envelope template

1. In the list of templates, click on the **New** button.
2. In the **Template description** window, Type the name of the template, press **Tab**.
3. Type description (optional).
4. When finished, click **Next**.
5. In the **Template type** window, click **Envelope** and click **Next**.
6. In the **Envelope option** window, choose the envelope size, click and press **Tab**.
7. Press **Tab** again.
8. Choose an initial envelope layout (optional), click **Finish**.

A big white rectangle the size of an envelope appears on the screen. You are now ready to put your information in. You have to use the same tools to build an envelope that to build an invoice template. Refer to the previous section to learn how to use those tools. Here is an example of an envelope template.



This template contains three types of object:

Picture: the Cyclean Logo.

Text box: The return address.

Field: The customer information fields.

The fields will be replaced by the customer information when you will open this template in a job or when you will use it in a mail merge.

When you have finished creating the envelope, save and close the template window.

Setting up your Label Template


How to create a new label template

1. In the list of templates, click on the **New** button.
2. In the **Template description** window, Type the name of the template, press **Tab**.
3. Type description (optional).
4. When finished, click **Next**.
5. In the **Template type** window, click **Label** and click **Next**.
6. In the **Label option** window, choose the label size or Avery Number, click and press **Tab**.
7. Press **Tab** again.
8. Click **Finish**.

A small white rectangle the size of a label appears on the screen. You are now ready to put your information in. You have to use the same tools to build a label that to build an invoice template. Refer to the previous section to learn ho to use those tools. Here is an example of a business card.











This template contains four types of objects:

1. **Picture:** the Cycleclean Logo.
2. **Text box:** The address information and the name.
3. **Rectangle:** Separating the top and bottom.
4. **Field:** Used to enter the clients mailing address

	
1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333	
Bill / Company Full name Address 1, Address 2 City. State. Zip code	

The label template is different than the other type of template. Because of its size, we can print more than one label on one page. Mistral 2000 organizes the printing page automatically.

Here is a preview of the label page before printing.

 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333	 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333
Allan Wirtz 739 Madrie Tempe, AZ 85111	Andy Auburn 9209 Collins Tucson, AZ 85542
 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333	 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333
Angie Pexi 8298 Redfern Chandler, AZ 85284	Bob Sien 123 Clannard Chandler, AZ 85233
 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333	 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333
Daniele Mollino 9298 Devon Tempe, AZ 85124	Don Estrada 2344 Carlton Mesa, AZ 85321
 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333	 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333
Gabriella Robin 9320 Cavendish Glendale, AZ 84999	Holly Quercia 8219 Marlboro Chandler, AZ 85236
 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333	 1290 Main Street, Springfield, AZ 85220 Tel (705) 555-2222 Fax (705) 555-3333
Jennifer Pontes 2373 Hudson Tempe, AZ 85124	Joana Mc Athly 6392 Maynard Glendale, AZ 84900

When you have finished creating the label, save and close the template window.

Setting up your Letter template

How to create a new letter template

1. In the list of templates, click on the **New** button.
2. In the **Template description** window, Type the name of the template, press **Tab**.
3. Type description (optional).
4. When finished, click **Next**.
5. In the **Template type** window, click **Letter** and click **Next**.
6. In the **Letter option** window, choose the paper size, click and press **Tab**.
7. Press **Tab** again.
8. Click **Finish**.

A big white rectangle the size of a sheet of paper appears on the screen. You are now ready to put your information in. You have to use the same tools to build a letter that to build an invoice template. Refer to the previous section to learn how to use those tools. Here is an example of a letter.

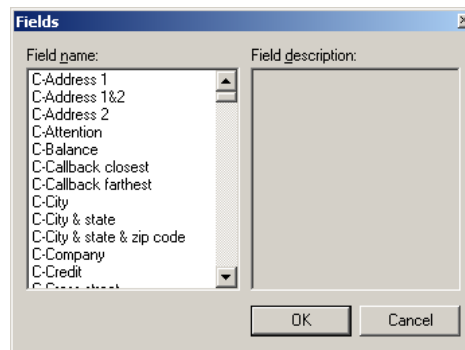
This template contains five types of object:

1. **Picture:** the Cycleclean Logo.
2. **Text box:** The return address.
3. **Field:** The customer information fields.
4. **Rectangle with round corners:** for the yellow bars.
5. **Ellipse:** for the little ellipse.

 Replace with your own Company Logo	Company address Line 2 Line 3 Line 4
~O- Today - day of week~ ~O- Today - month name~	
Bill / Company Full name Address 1, Address 2 City State Zip code	
~ THANK YOU ~	
Dear ~C-Mr. Ms...~ ~C-Lastname~,	
We would like to Thank You for choosing ~O-Company~ and placing your trust in us to execute your cleaning work on ~C-Last service~.	
Our team of technicians take Great Pride in being able to provide excellent results for clients like yourselves. For this reason we would like to be certain that everything was done to your entire satisfaction. If for any reason, you were not completely satisfied with our service, please do not hesitate to contact us. We will try to help in any way in order to satisfy your concerns	
As specialist in cleaning carpets, furniture, draperies and blinds, we are at your disposal, as well as your relatives and friends, to fulfil all your cleaning requirements. Our office is open from Mondays to Fridays, between 8am to 4:30pm.	
Thank you for choosing ~O-Company~, in the hopes of having the pleasure of serving you and your family in the future.	
Regards,	
Linda Smith Customer Service Representative	
Proudly Quality Service for over 30 years in both Residential and Commercial Environments	

The fields used in this template are different from the fields used in the invoice. In this letter, we used text-integrated fields. It means that the fields were integrated directly in the text box. Here are the steps to integrate a field directly in a text box:

1. Create a new template.
2. Click on the **text** icon.
3. Draw the text box in your template
4. Type the text.
5. When you are ready to include a field, right-click in the text box.
6. Choose the **Insert Field...** option.
7. Choose the appropriate field from the list and click **OK**.
8. Repeat this procedure for every field to insert in the text.



The fields will be replaced by the customer information when you will open this template in a job or when you will use it in a mail merge.

Example:

A line created to look like "Dear ~C-Mr. Ms...~ ~C-Lastname~,,"

Will actually print appearing like "Dear Mr Marcelli,"

When you have finished creating the letter, save and close the template window.

Field names and their descriptions

When you highlight a Field in the Insert Field window, a description of that field will be shown in the description window on the right hand side. To make things a little easier in planning your new Templates, our next section has all the fields and descriptions of what those fields will do.

Customer Fields

C-Address 1	Customer: Address line 1
C-Address 1&2	Customer: Address line 1 and 2
C-Address 2	Customer: Address line 2
C-Attention	Customer: Attention of
C-Balance	Customer: Balance Customer mail merge only
C-Bill to	Customer: Name and billing address + phone
C-Bill to (no phone)	Customer: Name and billing address
C-Callback closest	Customer: Closest callback date Customer mail merge only
C-Callback farthest	Customer: Farthest callback date Customer mail merge only
C-City	Customer: City
C-City & state	Customer: City and state
C-City & state & zip code	Customer: City and state and zip code
C-Company	Customer: Company
C-Credit	Customer: Credit \$
C-Cross street	Customer: Crossing street
C-Custom 1	Customer: Custom 1
C-Custom 10	Customer: Custom 10
C-Custom 2	Customer: Custom 2
C-Custom 3	Customer: Custom 3
C-Custom 4	Customer: Custom 4
C-Custom 5	Customer: Custom 5
C-Custom 6	Customer: Custom 6
C-Custom 7	Customer: Custom 7
C-Custom 8	Customer: Custom 8
C-Custom 9	Customer: Custom 9
C-Fax	Customer: Fax
C-Firstname	Customer: Firstname
C-Fullname	Customer: Fullname
C-Last service	Customer: Last service date
C-Lastname	Customer: Lastname
C-Mr. Ms...	Customer: Mr. Ms...
C-Note	Customer: Note
C-Number	Customer: Number
C-Other phone	Customer: Other phone
C-Phone	Customer: Phone

C-Purchased	Customer: Total purchased Customer mail merge only
C-Rebate	Customer: Default rebate amount \$
C-Rebate %	Customer: Default rebate %
C-Source	Customer: Initial source
C-State	Customer: State
C-Totaljobs	Customer: Total jobs Customer mail merge only
C-Totalunpaid	Customer: Total unpaid jobs Customer mail merge only
C-Type	Customer: Type (residential or commercial)
C-Zip code	Customer: Zip code

Employee Fields

E-All names	Employee: All employees for the job
E-Commission initial \$	Employee: Employee initial commission \$
E-Commission initial \$ 2	Employee: Employee initial commission \$
E-Commission initial \$ 3	Employee: Employee initial commission \$
E-Commission initial \$ 4	Employee: Employee initial commission \$
E-Commission initial \$ 5	Employee: Employee initial commission \$
E-Commission initial \$ 6	Employee: Employee initial commission \$
E-Commission initial \$ 7	Employee: Employee initial commission \$
E-Commission initial \$ 8	Employee: Employee initial commission \$
E-Commission initial \$ 9	Employee: Employee initial commission \$
E-Commission initial \$ 10	Employee: Employee initial commission \$
E-Commission initial \$ 11	Employee: Employee initial commission \$
E-Commission initial \$ 12	Employee: Employee initial commission \$
E-Commission initial %	Employee: Employee initial commission %
E-Commission initial % 2	Employee: Employee initial commission %
E-Commission initial % 3	Employee: Employee initial commission %
E-Commission initial % 4	Employee: Employee initial commission %
E-Commission initial % 5	Employee: Employee initial commission %
E-Commission initial % 6	Employee: Employee initial commission %
E-Commission initial % 7	Employee: Employee initial commission %
E-Commission initial % 8	Employee: Employee initial commission %
E-Commission initial % 9	Employee: Employee initial commission %
E-Commission initial % 10	Employee: Employee initial commission %
E-Commission initial % 11	Employee: Employee initial commission %
E-Commission initial % 12	Employee: Employee initial commission %
E-Commission sales \$	Employee: Employee sales commission \$
E-Commission sales \$ 2	Employee: Employee sales commission \$
E-Commission sales \$ 3	Employee: Employee sales commission \$
E-Commission sales \$ 4	Employee: Employee sales commission \$
E-Commission sales \$ 5	Employee: Employee sales commission \$
E-Commission sales \$ 6	Employee: Employee sales commission \$
E-Commission sales \$ 7	Employee: Employee sales commission \$

E-Commission sales \$ 8	Employee: Employee sales commission \$
E-Commission sales \$ 9	Employee: Employee sales commission \$
E-Commission sales \$ 10	Employee: Employee sales commission \$
E-Commission sales \$ 11	Employee: Employee sales commission \$
E-Commission sales \$ 12	Employee: Employee sales commission \$
E-Commission sales %	Employee: Employee sales commission %
E-Commission sales % 2	Employee: Employee sales commission %
E-Commission sales % 3	Employee: Employee sales commission %
E-Commission sales % 4	Employee: Employee sales commission %
E-Commission sales % 5	Employee: Employee sales commission %
E-Commission sales % 6	Employee: Employee sales commission %
E-Commission sales % 7	Employee: Employee sales commission %
E-Commission sales % 8	Employee: Employee sales commission %
E-Commission sales % 9	Employee: Employee sales commission %
E-Commission sales % 10	Employee: Employee sales commission %
E-Commission sales % 11	Employee: Employee sales commission %
E-Commission sales % 12	Employee: Employee sales commission %
E-Fixed add-on sales \$	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 10	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 11	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 12	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 2	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 3	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 4	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 5	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 6	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 7	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 8	Employee: Employee total fixed add-on \$
E-Fixed add-on sales \$ 9	Employee: Employee total fixed add-on \$
E-Fixed amount \$	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 2	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 3	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 4	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 5	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 6	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 7	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 8	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 9	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 10	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 11	Employee: Employee fixed amount for job \$
E-Fixed amount \$ 12	Employee: Employee fixed amount for job \$
E-Full name	Employee: Employee full name
E-Full name 2	Employee: Employee full name
E-Full name 3	Employee: Employee full name
E-Full name 4	Employee: Employee full name
E-Full name 5	Employee: Employee full name

E-Full name 6	Employee: Employee full name
E-Full name 7	Employee: Employee full name
E-Full name 8	Employee: Employee full name
E-Full name 9	Employee: Employee full name
E-Full name 10	Employee: Employee full name
E-Full name 11	Employee: Employee full name
E-Full name 12	Employee: Employee full name
E-Total pay \$	Employee: Employee total pay \$
E-Total pay \$ 2	Employee: Employee total pay \$
E-Total pay \$ 3	Employee: Employee total pay \$
E-Total pay \$ 4	Employee: Employee total pay \$
E-Total pay \$ 5	Employee: Employee total pay \$
E-Total pay \$ 6	Employee: Employee total pay \$
E-Total pay \$ 7	Employee: Employee total pay \$
E-Total pay \$ 8	Employee: Employee total pay \$
E-Total pay \$ 9	Employee: Employee total pay \$
E-Total pay \$ 10	Employee: Employee total pay \$
E-Total pay \$ 11	Employee: Employee total pay \$
E-Total pay \$ 12	Employee: Employee total pay \$
E-Type	Employee: Employee type
E-Type 2	Employee: Employee type
E-Type 3	Employee: Employee type
E-Type 4	Employee: Employee type
E-Type 5	Employee: Employee type
E-Type 6	Employee: Employee type
E-Type 7	Employee: Employee type
E-Type 8	Employee: Employee type
E-Type 9	Employee: Employee type
E-Type 10	Employee: Employee type
E-Type 11	Employee: Employee type
E-Type 12	Employee: Employee type

Job Fields

J-Balance	Job: Balance
J-Balance prev. invoices	Job: Customer balance
J-Comment	Job: Comment
J-Custom 1	Job: Custom field 1
J-Custom 2	Job: Custom field 2
J-Custom 3	Job: Custom field 3
J-Date	Job: Date
J-Lines	Job: Description / services
J-Note	Job: Note
J-Number	Job: Number
J-Paid	Job: Amount paid

J-PO number	Job: PO number
J-Prev. invoices	Job: Balance of all other invoices
J-Reason	Job: Reservice reason
J-Rebate	Job: Rebate amount \$
J-Rebate %	Job: Rebate %
J-Rebate total	Job: Total rebate
J-Reservice	Job: Reservice (yes/no)
J-Reserviced	Job: Reserviced (yes/no)
J-Source	Job: Source
J-Subtotal 1	Job: Subtotal before rebate
J-Subtotal 2	Job: Subtotal after rebate
J-Tax 1 total	Job: Tax 1 total
J-Tax 2 total	Job: Tax 2 total
J-Total	Job: Total
J-Total block	Job: Configurable total block with subtotals - rebates and taxes
J-Type	Job: Type (Quotation - Work Order - Invoice)
J-Type lowercase	Job: Type (quotation - work order - invoice)
J-Type uppercase	Job: Type (QUOTATION - WORK ORDER - INVOICE)
J-Voided	Job: Voided (yes/no)
J-Voided word	Job: Voided If voided - the word Voided appears - if not - nothing appears
J-W.o date	Job: Work order date
J-W.o number	Job: Work order number

Other Fields

O-Company	Other: Your company name
O-Company address	Other: Your company address
O-Page number	Other: Page number
O-Page number / total	Other: Page number (# / total)
O-Page number word	Other: Page number (Page #)
O-Page number word of total	Other: Page number (Page # of total)
O-Page total	Other: Total pages
O-Tax 1 registration #	Other: Your tax 1 registration #
O-Tax 2 registration #	Other: Your tax 2 registration #
O-Today	Other: Today's date xx/xx/xxxx
O-Today - day of month	Other: Today's day 0-31
O-Today - day of week	Other: Today's day of week
O-Today - month	Other: Today's month 0-12
O-Today - month name	Other: Today's month name
O-Today - year	Other: Today's year xxxx

Site Fields

S -Address 1	Site: Address line 1
S -Address 1&2	Site: Address line 1 and 2
S -Address 2	Site: Address line 2
S -Attention	Site: Attention of
S -City	Site: City
S -City & state	Site: City and state
S -City & state & zip code	Site: City and state and zip code
S -Company	Site: Company
S -Cross street	Site: Crossing street
S -Custom 1	Site: Custom 1
S -Custom 2	Site: Custom 2
S -Custom 3	Site: Custom 3
S -Custom 4	Site: Custom 4
S -Custom 5	Site: Custom 5
S -Fax	Site: Fax
S -Firstname	Site: Firstname
S -Fullname	Site: Fullname
S -Lastname	Site: Lastname
S -Note	Site: Note
S -Other phone	Site: Other phone
S -Phone	Site: Phone
S -Site	Site: Name and billing address + phone
S -Site (no phone)	Site: Name and billing address
S -State	Site: State
S -Zip code	Site: Zip code

Schedule Fields

Sc-Date (first block)	Schedule: Date of the first block
Sc-Date (from - to)	Schedule: From date to date
Sc-Name	Schedule: All schedules for the job
Sc-Name-Date-time	Schedule: All time blocks for the job
Sc-Time end (first block)	Schedule: Ending time of the first block
Sc-Time start (first block)	Schedule: Starting time of the first block