

Additions to Manual, version 2.5 of Machine Quilters Business Manager September 2009

The most significant change is to the overall look and navigation of the system. The screens are essentially the same as previous version, we have just added the left navigational bar.

Main Menu:

Back Instructions:

This is a tab which gives the instructions on how to back up your system. Please do this regularly!!!

Customer Screen

<div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Customers</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Add New Customer</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Delete Customer</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Search Customers</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Invoice/Sales</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Shipping Label</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Invoice Worksheet</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Referral Log</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Repeating Customer</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Print Customer List</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Blank Worksheet</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Mailing Labels</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">E-mail List</div>	<p>The customer search is now located along the left of the screen. Once a customer is selected, the Invoice/Sales, shipping label and invoice worksheet will be for that customer.</p> <p>Other screens can be accessed from clicking on the links</p> <p>Referral log</p> <p>Repeating Customer</p> <p>Blank Worksheet (this worksheet has no customer information inserted.) This report can be used as an intake sheet when your computer is not available. It will list out your charges for Quilting Service, Battings, Backings, Bindings and has blank spaces for Thread Choices, Set Up, Trimming, Turning, etc.</p> <p>Print Customer List</p> <p>Mailing Labels</p> <p>Email List is new. Follow the directions on the screen to use. Essentially you will copy the names from the list and then paste them into your address line on your email provider screen.</p>
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Changes to Invoice Screen:

<div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Sales/Invoice</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Search Customers</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Return to this Customers Information</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Blank Invoice Worksheet for this customer</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Search All by MQBM Invoice #</div> <div style="background-color: #4F81BD; color: white; padding: 2px; text-align: center; font-weight: bold;">Decimal Chart</div>	<div style="border: 1px solid #4F81BD; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> New Quilt Type of Sale: Quilt Name of Quilt: <input style="width: 150px;" type="text"/> </div> <div style="display: flex; justify-content: space-between;"> Delete this Quilt MQBM Inv#: Number Search Quilts by Name: <input style="width: 100px;" type="text"/> by MQBM# <input style="width: 50px;" type="text"/> </div> <div style="display: flex; justify-content: space-between;"> OR Your Inv #: <input style="width: 50px;" type="text"/> Last # <input style="width: 50px;" type="text"/> Type of Quilt: </div> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> Date Accepted: <input style="width: 80px;" type="text"/> Promised: <input style="width: 80px;" type="text"/> Completed: <input style="width: 80px;" type="text"/> Returned: <input style="width: 80px;" type="text"/> </div> </div>
	<p><u>Type of Sale:</u> Enter the type of sale which best represents the items being sold on the invoice. The type will default to Quilt but if you want to sell something else, books, notions, rolls of batting, etc, the invoice can be labeled as such and will then group together on the Sales Log and in the Financial Reports.</p> <p><u>Your Invoice #.</u> You now have a choice to use either the MQBM invoicing numbering system or to build your own list. Clicking on Last # used will allow you to see the last number that was entered, so you can easily keep track of your numbers. This is a number only field, no letters or – allowed!</p> <p><u>Search by MQBM#:</u> You can now search by MQBM Invoice # for the customer, rather than remembering the name of the quilt</p> <p><u>Search All by MQBM Invoice #:</u> This link will take you to the Payment Screen where you can enter payments across customers, using MQBM invoice # as your look up field.</p>

Thread Sales

There are two methods for entering thread sales. Step 1 allows entry of thread color choices but is limited to three threads and no amount can be entered. Step 1a allows for as many threads as you care to enter and it allows for

quantity used to be entered. You can use either system to track thread or both if you choose. Charges are entered separately. Step 1a will require a line for each thread listed, so it can expand your invoice to 2 pages!

Step 1: Select Thread Types

Thread 1:

Thread 2:

Thread 3:

Bobbin:

Star Black
Star White
To match
Rayon
Variegated Thread

Step 1a: OR Enter thread colors and amount used for tracking

Thread Color:	Amount Used:	Unit:
Amazon Rainforest	1	cone
Amco Rust	0.25	cone
*		

Record: 2 of 2

Step 1

- Click on the drop down arrow and select thread.
- There is space to place 3 separate top thread choices and 1 for the bobbin.
- It is recommended to use the most used colors in the list.
- You can enter any thread choice in the box even if it is not on the list.
- The list is maintained in the Drop Down List Section.

Step 1a

- Click on Thread Color choice drop down and select the thread
- Once the quilt is complete, enter the amount of thread used, this can be by bobbin, by cone, spool, etc. The list will build as you enter items.
- Later in Financials, you can print out the list of threads and how much of each was used.

Batting Sales

Many have asked for the quantity of batting to be included on the Invoice, but there are just as many who do not want this information listed on the customer invoice. So.. we have added the quantity of batting sold only on the Shop Invoice. This will give you reference for the quilt order, including batting quantity and the Date due in Red at the top.

Changes to Printed Invoice

We have added the ability to add up to 4 quilts to a single invoice. Essentially you will enter your quilts separately as all of the design choices, etc will be specific to a quilt. The Invoice that prints is a combination of these invoices with a total due at the end of the statement.

To add quilts to the invoice, just type in the MQBM# into the screen. You may skip a screen if you have less than 4 quilts to add.

Enter Parameter Value

Enter the 1st MQBM Quilt #, then click OK or Enter, if less than four invoices are needed, just click OK to skip

OK Cancel

Work Log

The changes to the Work Log include the new fields of Design Choice, Type of Quilting and Subtotals. The sorting features are also streamlined and gives you a quick look at what quilts are in your studio.

Waiting List

The changes to the Waiting List are minor.

Go To Date: <input type="text"/>	Go To Date: Allows you to move to future dates more quickly. Just type in the needed date and your list will move to that date.
Search for Customer: <input type="text"/>	Searching for Customers upcoming appointments and openings is now done at the bottom of the screen. Just choose your customer from the list and the appointments will sort to those for that customer. To bring back the full list, just click Remove Sort.
Search for Openings: <input type="text"/>	

Financials

<p>Financials</p> <p>Supply Entry</p> <p>Expense Entry</p> <p>Supplier List</p> <p>Quilt/Sales Log Screen</p> <p>Financial Reports</p>	<p>Here is where you will find your Supplies and Expense entry, Supplier List, the Quilt Sales Log and access to your Financial Reports.</p>
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Quilt/Sales Log

All Sales will be listed on this screen. The Search Tool has expanded to include Types of Sale so you can filter out the sales as needed.

Financial Reports:

You must choose Type of Sale and then the reports below will filter for that Type of Sale.

All sales combined will reveal all sales grouped by the Type of Sale.

Thread Reports

Also notice the Thread Color Report and Thread Color Use Report. Thread Color Report will group all of the threads listed in your Drop Down list with quilts that you used them on. The Thread Color Use Report will reveal the Step 1a thread list which can report total amounts of thread used for inventory.

Thread Color Report

1/1/2007 to 12/31/2008

Inoice #:	Date paid:	Type of Quilting:	Size of Quilt:
Amazon Rainforest			
38	9/12/2007	Custom Complex \$.025 per square inch	5976.00
366	12/22/2007	Overall Simple \$.0125 per square inch	4.00
Bobbin			
366	12/22/2007	Overall Simple \$.0125 per square inch	4.00
Amco Rust			
366	12/22/2007	Overall Simple \$.0125 per square inch	4.00
Black			
366	12/22/2007	Overall Simple \$.0125 per square inch	4.00

The third will list out the Threads listed in Step1A from the Quilt Order page. This will give you amounts of thread sold.

Thread Use Report

1/1/2007 to 12/31/2008

Date paid: Invoice #: Amount Used: How Sold: Type of Quilting:

Amazon Rainforest

12/22/2007	366 / 1006	1	cone	Overall Simple \$.0125 per square inch
Total Amount Used:		1		

Amco Rust

9/12/2007	38 / 0			Custom Complex \$.025 per square inch
12/22/2007	366 / 1006	0.25	cone	Overall Simple \$.0125 per square inch
Total Amount Used:		0.25		

Batting Sold and Backing Sold

Batting Sold		1/1/2007 to 12/31/2008														
Batting Type Quilt#	Date	Batting Amt	Batting Charge	Batting Purchased												
<i>Hobbs 6 ounce polyester 48" wide</i>																
368	12/19/2007	77	\$3.08													
366	12/22/2007	72	\$2.88													
Amount Sold::		149	\$5.96													
				<table border="1"> <thead> <tr> <th>Date Purchased</th> <th>Qty:</th> <th>Total Cost</th> <th>Notes</th> </tr> </thead> <tbody> <tr> <td>12/31/2007</td> <td>900</td> <td>\$77.00</td> <td>open 12/31/07</td> </tr> <tr> <td>Total:</td> <td>900</td> <td>\$77.00</td> <td></td> </tr> </tbody> </table>	Date Purchased	Qty:	Total Cost	Notes	12/31/2007	900	\$77.00	open 12/31/07	Total:	900	\$77.00	
Date Purchased	Qty:	Total Cost	Notes													
12/31/2007	900	\$77.00	open 12/31/07													
Total:	900	\$77.00														
<i>Hobbs 6 ounce polyester 96" wide</i>																
38	9/12/2007	82	\$6.56													
Amount Sold::		82	\$6.56													
Totals:		231	\$12.52													

IF you have been consistent with naming battings and backings in both Supply Entry and on Invoices, this report will pull together these badkings/battings you have sold per invoice with what you have purchased. So after you have developed your Batting Sales drop down list, double check your Drop Down list for Supplies to make sure the names of the battings are consistent and unique. It is also helpful to be consistent in the amount columns between the two areas. For ex, if you sell batting by the linear inch, then when you record how much you purchase, calculate the linear inches you have purchased. On the above example, you can see that 900 linear inches of Hobbs 6 ounce polyester was purchased, not 1 roll. If you enter the date you begin to use the roll, and when you finish a roll, you will have a quick idea of your batting inventory.