



# Systems Unlimited

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### Master Quote - Demonstration Version

We hope you enjoy the product. Plumbers have tested it along the way and, before it's final release, we have had the input of many more towards its final refinement. We hope those few have helped give you a product that covers your needs and we are always open to further suggestions for any future upgrades.

Our aim has been to provide a product that enables easy search facility of the many products needed in your industry and the ability to quote by product but print with just the description of the job for your customers. We hope this will be the time saving device that we aimed to achieve on your behalf, at a reasonable price.

Being the demonstration version of Master Quote, we advise that there are a few restrictions on the product. You will not be able to enter your company/business name although you will be able to enter your address and all other relevant information. We have restricted the number of imported items to 50 but you will still be able to set up your own, and put a limit on the number of customers you can enter. The other area that you will be unable to modify is the Quote Message and Special Conditions. Apart from these minor restrictions, the demonstration version is the same as the full version. It should be noted however that you would not be able to bring any data entered across to the full version should you wish to acquire this product.

#### Installing the Demonstration Version of Master Quote

Double click on the file **MQDemo.EXE** and the program will begin the installation process, click OK. The default directory will be *MQDemo* and it will set this up itself, just click OK. When it is installed you will return to the windows desktop. You will need to open Windows Explorer, locate the *MQDemo* directory, and double click to open and then double click on the file on the right *MQ\_Demo.mde* to open the program. You can make a shortcut of this file (*MQ\_Demo.mde*) to enable easier access in the future.

To create a shortcut, click once on *MQ\_Demo.mde*, right click on the mouse to get the drop down menu. Scroll down to Create Shortcut, minimise the explorer screen and drag this shortcut on to the desktop. Double click to open the program.

#### Brief Instructions for Demonstration Version of Master Quote

**STEP 1:** From *Main Command Centre*, select *Housekeeping Command Centre*, then select *System Setup*. This is where you would set up your company details. Please note that in the demonstration version you are unable to change the *Company Name* section nor the *Quote Message* or *Special Conditions* sections, but all other areas you can change to your information. Following is a brief explanation of the other areas in this section.

- Next Quote No.:** If you are using an existing system, put in the first quote number you wish to use in MQ.
- Location of MYOB:** This is to ensure that exported file goes to the correct directory for easy importation.

- ❑ **MYOB Version:** Each version of MYOB has a different export requirement, selecting the correct version of MYOB will ensure the export is in the right format when importing your accepted quotes into MYOB.
- ❑ **MYOB Sales Account No.:** Enter the number of the income account in MYOB that you wish the accepted quotes to be allocated.
- ❑ **GST Rate:** You might wish to make this zero until the 1<sup>st</sup> July 2000
- ❑ **Print Control:** Select Letterhead for no company name to print or Plain Paper if you will not be using letterhead and therefore require your company name to print on Quotes.
- ❑ **Quote Message:** This will appear on each quotation – it may be re terms or GST, allowing for overlap past 1/7/2000, and can be customised on each individual quote. *(Not changeable in the Demonstration Version)*
- ❑ **Special Conditions:** This will appear on the acceptance slip at the bottom of every quote, and can be customised on each individual quote. *(Not changeable in the Demonstration Version)*

**STEP 2:** Return to **Main Command Centre**, select **Import/Export Command Centre** and **Import New Data**. This will allow you to import prices, customers & items from MYOB. Click on the down arrow to the right of the box next to **Select Supplier to Import Prices** to enable import into the correct format, select file and wait for the counter to finish importing. The Demonstration Version will only allow a maximum of 50 items to be imported. When you have finished importing, close form and return to main switchboard.

**STEP 3:** Click on **Data Command Centre**

- ❑ Edit/view customers (change or add new). Always click on New Customer even if the screen is blank when you first enter.
- ❑ Edit/view items (to add your own items eg Labour –apprentice/supervisor rate etc, travel etc., set up Groups eg Labour etc. to attach to your own items for easy location. Always click on Add New Item first even if the screen is blank.
- ❑ Edit/view Kits – eg group individual items together if job is done regularly that require the same fittings. Click on New Group to ensure you do not overwrite the existing groups.
- ❑ Set Active/Inactive items – this will minimise the number of items in the search area by making inactive those items or item groups that are not relevant to the individual business.

**STEP 4:** Now return to the **Main Command Centre** to start entering quotes click on **Quotes Command Centre**, and then **Enter New Quotes**.

- ❑ Fill out Customer name, either start typing or click on dropdown arrow to list of customers. If this is a new customer click *New* before typing and you will be at the data entry screen for customers; click on *New Customer* before typing or the default terms will not be attached, this will cause warnings when transferring to MYOB V9 and later. If in error you enter the name on the quote, click on 'esc' on the keyboard to clear the typing and then click *New*.
- ❑ Using the TAB key to move through the fields, enter reference number (this maybe a manual quote number or you may not require this field at all) and order number if relevant; enter a default markup rather than entering on each line, date, and confirm the pricing options. If you use Trade just enter the margin, if using Retail enter a minus margin eg "-10". Click in the field under the customers name to enter job address if different from the customers.

**In the middle of the quote form you will see headings, click on these to move between the sections of the quote. Line Items will show all the items selected for this quote, but by clicking on Item Search, the items are much easier to locate. After adding all the new items to the quote from the Item Search screen you can click back on the Line Items section to review.**

**Line Items** – Click on the first line under the Item Number heading and a down arrow will appear on right Click on this to select item by scrolling down to highlight, alternatively, click onto the Item Search section and locate items by the various search methods provided.

**Item Search** – Allows search by Group or Supplier click on down arrow to select. Once the selected list appears you can highlight a word/words by dragging the mouse across then click on the filter icon with the lightening bolt to the right (see below) and all the items with the matching criteria will be displayed. You can then select another word and it will shorten the list again. Alternatively, typing in Keyword eg Tap, then Caroma then highlight a word eg colour and it will give you all the Caroma taps for basin and bath in white. Typing in Caroma tap will not find all the caroma taps only those items that have these words together, alternatively D.V. will not find DV. Once you get used to the alternative search facility, even searching on Tradelinks 20,000 plus items the search becomes quite quick.

Once you have selected an item by clicking on it to highlight you will notice that the item will appear at bottom of screen. Enter qty (tab), margin eg 10 =10% (tab), then click “Add New Line to Quote”, and then select next item. It is important to TAB through the fields or the amounts will not be extended and the quote will be incorrect. You can click back on **Line Item** to see the selected items on this quote.

**Notes** – This is the summary to be printed on Compact Quote and can be as long as you like. Only the first 255 characters will be exported to MYOB as a form of reference.

**Quote Summary** – Shows total and the profit component, also allows for the modification of the Quote Message and the Special Conditions (except in the demonstration version).

Select Save or Save & Print and click Close to return to main Switchboard when finished. If you select to print, the next screen will allow the option to preview before printing and also show you all the alternative forms that can be printed.

**STEP 5: Modify** – to change original quote if necessary. This is also where you can accept the quote by clicking in the box to the right of *Accepted*; the current date will be the default but can be changed. You will also find addition field that can be entered to enable search on these fields at a later date being *Contract Number* and under *Quote Summary*, the *Compliance Reference Number*. To search on these fields, firstly, highlight the relevant field, click on the binocular icon (see below) and type in the number you wish to locate and click on Find First. If you don't know the full number, change the *Match All* box to *Any Part of Field* or *Start of Field*, then click Find First and if you look at the order now displayed the correct one should have been located. The accepted date becomes the invoice date in MYOB and Master Quote knows this quote is now ready to be exported as a pending invoice.

**STEP 6: Import/Export Switchboard** – Export Sales to MYOB – This will export any sales that have had the pending tick removed and have not previously been exported to MYOB. (To import into MYOB, firstly ensure that the correct income account is set up then go to File, Import, Sales, Service, change to data record – find the file “svcsales.txt” and click on match all)

**This is just a brief summary of using Master Quote. We hope that you have been able to fully assess the benefits of our product for your organisation given the brief instructions provided. If you have any further queries, please do not hesitate to contact Serendipity Consulting Pty Ltd. on (03) 9791 2756 or alternatively email on [judy@mail.onaustasia.net](mailto:judy@mail.onaustasia.net).**

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