



P r o p o s a l   G e n e r a t i o n   S y s t e m

## Users Guide



**Z-Micro Technologies, Inc.**

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# Chapter 1: Overview

## *Introduction*

PURSUIT was designed to help increase sales through consistent follow-ups with your prospects, analysis of your marketing strategies, and the production of professional proposals. PURSUIT also provides you with job costing information that would otherwise be difficult to compile. If you currently own the ALARM or SERVICE EXPRESS Billing software, PURSUIT will allow you to easily integrate information about your prospects into the billing system once they have become a customer. In addition, PURSUIT can use the same inventory file as the billing system.

PURSUIT has been designed for both the computer novice and those experienced with the day to day operation of a computer system. PURSUIT incorporates pop-up windows and scrollable validation tables to greatly enhance data entry time and reduce keying errors. Completely menu driven, you will never need to remember a specific command in order to utilize any function within the software.

This manual has also been designed to allow anyone with little or no background to be using the PURSUIT system within a very short time. The best way to learn any system is to get 'hands-on' experience, so it is highly advisable to start using the software as soon as possible to get a feel for it.

Z-Micro Technologies, Inc. is always interested in hearing from our clients about any enhancements that you would like to see appear in future updates. If there is enough demand for a new feature, then it will be incorporated into a future update.

A license agreement is included at the end of this manual. Please read before installing the software.

If you have any questions or problems, you may contact us at (480) 767-5556 or 602-218-5313 for technical support during the hours of 9:00AM to 5:00PM Monday thru Friday EST. Our fax number is (480)767-5595.

## ***Features And Benefits Highlights***

- Contact Management section including user-definable fields, unlimited contact list per prospect, document attachments, unlimited sites and a follow-up conversation log.
- Comprehensive and flexible Proposal Writing section including:
  - Introduction and Closing page(s) consisting of free-form text
  - Detail page(s) listing proposed equipment/items to be sold. (Equipment may be sorted by part#, name, install location & category)
  - Optional Items page to help cross-sell client on additional products
  - Price override feature by markup percent or total job price
  - Additional Costs section for accurate job costing
  - Payment schedule section
  - Contract Section with the capability to merge prospect-related data into the contract
- Create new proposals from existing 'templates' categorized by job type
- Synchronize multiple installations of Pursuit with the included ProSync. This powerful tool allows Pursuit to be installed on multiple computers (ie:laptops) for outside sales while still maintaining a comprehensive database of ALL proposals within the office.
- Integrates with the ALARM and Service Express billing systems by setting up a Customer account in those programs once a prospect purchases, as well as creating an invoice, generating an installation ticket, and affecting inventory of items purchased.
- Proposals print on plain paper in both Black & White and Color modes.
- Four proposal printout styles – Classic, Modern, Simple or One-Page.
- Spell Checker included for text areas.
- Mail Merge section for mailing letters or postcards for sales follow-up or any other type of correspondence you require. Also includes mailing labels, export for email and faxing.
- Comprehensive inventory section including support for kit assembly listings (subcomponents sold automatically when a master component is sold). Completely integrated with the ALARM and Service Express inventory system.
- Job Costing that shows profit and loss on installations, including breakdown by materials and labor and estimated installation time.
- Purchasing List printout that can be faxed or brought to your distributor for part purchasing.
- Many browse lists (prospects, proposals, proposed equipment, inventory) have multiple sort 'tabs' that immediately change the order of the information displayed in the list simply by pressing the appropriate sort tab on the top of the list.
- Major list screens (Prospect, Proposals, Inventory, Call Center) can be resized according to screen resolution and columns may be reordered to fit specific sort selections.



## Requirements

### Hardware Requirements

- Processor:** The Pursuit Edition 7 software runs on any Pentium or higher processor.
- Memory:** 256 MB Ram Minimum (512 MB ram recommended)
- Drives:** CDROM Drive and 100 MB of free space on a Hard Disk
- Video:** Windows supported graphic adapter and monitor (800 x 600 minimum resolution, higher recommend)
- Printer:** Laser, Inkjet, Color Inkjet, and Dot Matrix printers supported through Windows (must have correct printer driver already installed in windows).

### Network Requirements

Windows 98, XP, NT, 2000

## **New Features Found In Pursuit Edition 7**

- PROSync synchronization capability to allow individual laptops with Pursuit installed to synchronize new and modified proposals back to the master office Pursuit database remotely (ie: via any internet connection). PROSYNC Documentation
- Contract creation and inclusion on printed proposals (also supports contracts imported from Word and attached to proposal) with merge capability. Pg 165
- One-Page Proposal format added for simple one-page output where multiple pages are not needed (header/equipment list/final pricing all on one page). Pg 23
- Optional Items section for listing equipment that the client can optionally purchase. Pg 100
- Unlimited PDF attachments to a proposal that can be printed along with proposal (helpful for tech specs, datasheets, brochures, etc). Pg 97
- Appointment Calendar revised (similar to Alarm 2004 calendar in features) Pg 128
- Spell Checker in all RTF areas (ie: proposal overview, closings, contract, etc.) Pg 58
- Service Tickets (Installation Tickets) can be created directly from a proposal if integrated with the Alarm or Service Express programs. Pg 170
- Favorites List feature in Inventory (when checked, only favorite items appear in inventory list for selection). Pgs 43, 119
- Multi-Level pricing in inventory now supported (as in Alarm 2004). Pg 43
- Email capability for proposals now includes authentication (if required) and greater ability to use any ISP's email server for outgoing email successfully. Pg 41
- Proposed equipment list may be exported to a format used by Excel. Pg 99
- GoogleMap link for viewing map of prospects' location. Pg 62
- GoogleMap link for directions to prospects' location (with the ability to select starting point as your office location or salesrep home location). Pg 62
- Inactive checkbox on prospect screen indicates inactive status on prospect list. Pg 64
- Overview and Closing sections now have their own phrase list areas
- Return Receipt option for outgoing emailed proposals. Pg 41
- Quantity on proposed equipment now supports up to 999,999.99
- Payment option fields now supports up to \$9,999,999.99 each
- Proposal Type field added to proposal screen and proposal list for additional

classifications of proposals. Pg 82

- Email address on proposal auto-filled based upon prospect selected
- Each prospect record now supports unlimited sites per prospect, with easy selection on proposals to determine which site the proposal is for. Pgs 71, 82
- Site address on proposal can be selected to change/not change if new prospect is selected for that proposal (helpful in site/headquarters situations). Pg 82
- Sender email address determined by salesrep sending out email, not global company email address (for more flexibility).
- Option to have prices marked up (including multi-level prices at different markup percentages) automatically when inserting items into inventory. Pg 117
- Main prospect, proposal and inventory lists now have drop-down selections for filter values rather than requiring values to be entered manually.
- All lines in the Job Price section (ie: Total Parts And Labor) can now be reworded by user or hidden individually. Pg 49
- New Subcategory field added to Inventory and Inventory List for added categorization of inventory parts. PG 118
- Security Administration has some additional new features including password timeout so that unauthorized users of Pursuit that had learned of a valid password would be locked out after a preset number of days unless overridden by a supervisor.
- Account Status field on prospect list now user-definable (instead of the Prospect/Customer/Dealer/Other preprogrammed selections). Pg 63
- Enhanced 'Copy Proposal' function to allow an exact replica of the original proposal and all of it's components to be copied to a new proposal. Pg 79
- Security settings for the 'Financial Tab' section of a proposal so that only authorized users can view and/or modify price markup and payment terms. Pg 30
- Inventory may have a default to select items by Part ID (current default), Manufacturer ID or UPC Code when adding items to proposals. Pg. 35
- Include your signature as a JPG image on the bottom of contracts. Pg 111
- Phrases can now be 'stacked' on top of each other in the Overview and Closing areas.

## ***Installing PURSUIT EDITION 7***

The PURSUIT software is contained on 1 CD. The software must be installed onto your hard disk before it can be used. **Please read the Software License Agreement near the end of this manual before opening the disc package. Use of this software is your agreement of the license.**

In order to facilitate the installation, an installation program has been included. This program will prompt you during the installation process as to where PURSUIT EDITION 7 is to be installed. If for some reason this procedure is interrupted, you may just start the process over again.

**NOTE: If you currently own ALARM For Windows or Service Express, DO NOT install Pursuit Edition 7 into the same directory that those programs are installed in. Pursuit 7 MUST be installed into its' own directory.**

To start the installation procedure, please follow these steps:

- Insert the PURSUIT EDITION 7 CD into your CD Drive.
- The installation program will launch automatically. If it does not, do the following:
  - Select **Run...** from the START button. Type **X:\SETUP (Where 'X' is the drive letter of your CDROM)** into the command line field and press Enter.
- The installation process will ask for the drive and directory to install into. You may select the default values or enter your own. Follow the prompts to complete the installation.

In addition to the Pursuit Edition 7 icon, a few additional icons were placed in the program group window. These include **Backup Data Files, ProSync, Documentations, and Uninstall**. Please refer to the appropriate chapters in this documentation for an explanation of these functions.

Please take the original disc and store it in a safe place. If you ever need to reload your software, you will need this disc along with a latest copy of your data file backup disk. To run Pursuit, double-click on the Pursuit Icon in the program group.

The first time you run Pursuit, you will be prompted to enter a serial number to register. Please refer to the serial number label affixed to the inside of the DVD case that Pursuit shipped in. If you received Pursuit by download, your serial number will be included in the email. You may also contact sales at 480-767-5556 to receive your serial number. Only registered purchasers of Pursuit will receive a serial number. Pursuit is licensed for the original purchasing company only and can not be used or transferred to any other party.

## Network Setup

### Setting up the Server

(This step only needed if you will be installing Pursuit in a network environment).

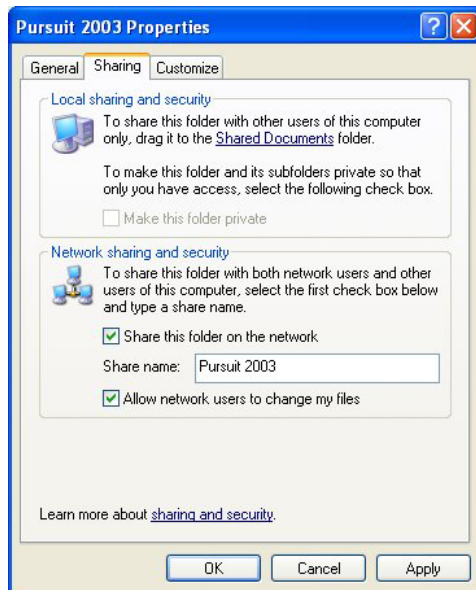
You will first need to determine which computer on your network will be dedicated as your server. In most cases you have purchased a “server” computer, or you will be using the fastest workstation on your network as your server machine. Just as you would install the Pursuit Edition 7 program on your original workstations, you will need to install the program on your network server or main workstation. If you need to restore your data from an original workstation, use the *Backup/Restore* procedure included with the Pursuit Edition 7 Software.

### Sharing the application (Server or Main Workstation)

In order for Pursuit Edition 7 to be properly utilized across your network, you will need to “share” the application for your other machines. To share the application (or program) you will need to access the Windows Explorer program (NT Explorer - if you are using Windows NT) or My Computer (Windows XP). Go to the C: drive or the drive letter where you have installed Pursuit Edition 7.

*(It is extremely important that you are aware of which drive you have installed the program).*

Figure 1



Right click on the C:\Pursuit Edition 7 folder, and left click on **SHARING** or **SHARING AND SECURITY (Windows XP)** (see figure 1.) If you do not have the option to **SHARE** the folder, your server may not be configured for file sharing (see *your Windows documentation for the proper network setup*).

Put a check in **SHARE THIS FOLDER ON THE NETWORK** and check **ALLOW NETWORK USERS TO CHANGE MY FILES**. The **SHARE NAME** can be changed at this time or you can default the name to the folder name. Then click on **APPLY** and then **OK**.

Once you have completed the above operation the folder is now ready to be shared by the workstations on your network.

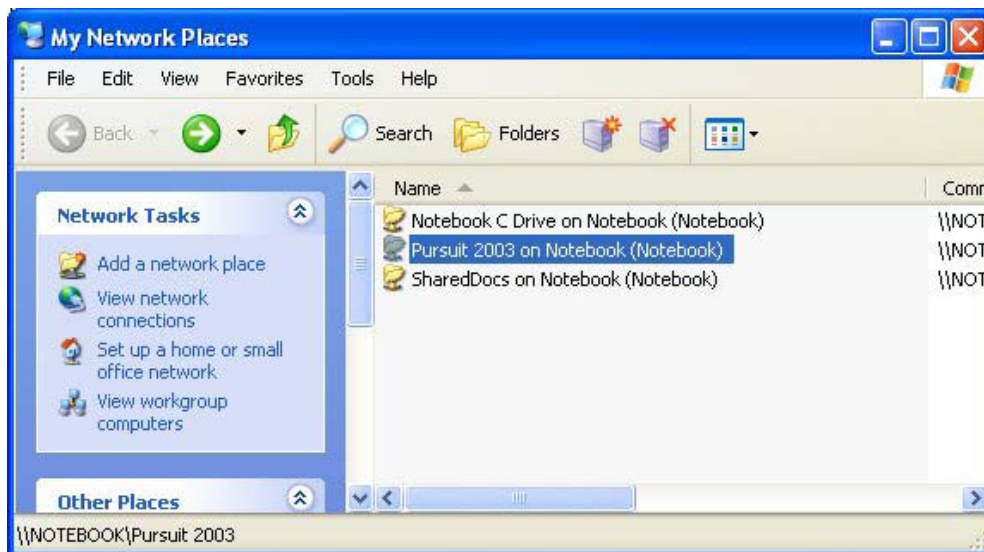
## Setting up the Workstation (Client)

Install the Pursuit Edition 7 application (program) on each workstation that you wish to have access to the Pursuit Edition 7 data. This is important to help maximize the functionality and speed of how the Pursuit Edition 7 program operates. It is more effective to install a copy of the software onto each of your workstations, which allows for only the data to migrate to the workstation when accessed. Instead of having the entire program broadcasted across your network, the program will simply send over the applicable files it needs each time the program is utilized.

Double left click the Network Neighborhood or My Network Places (Windows XP) icon on your desktop.

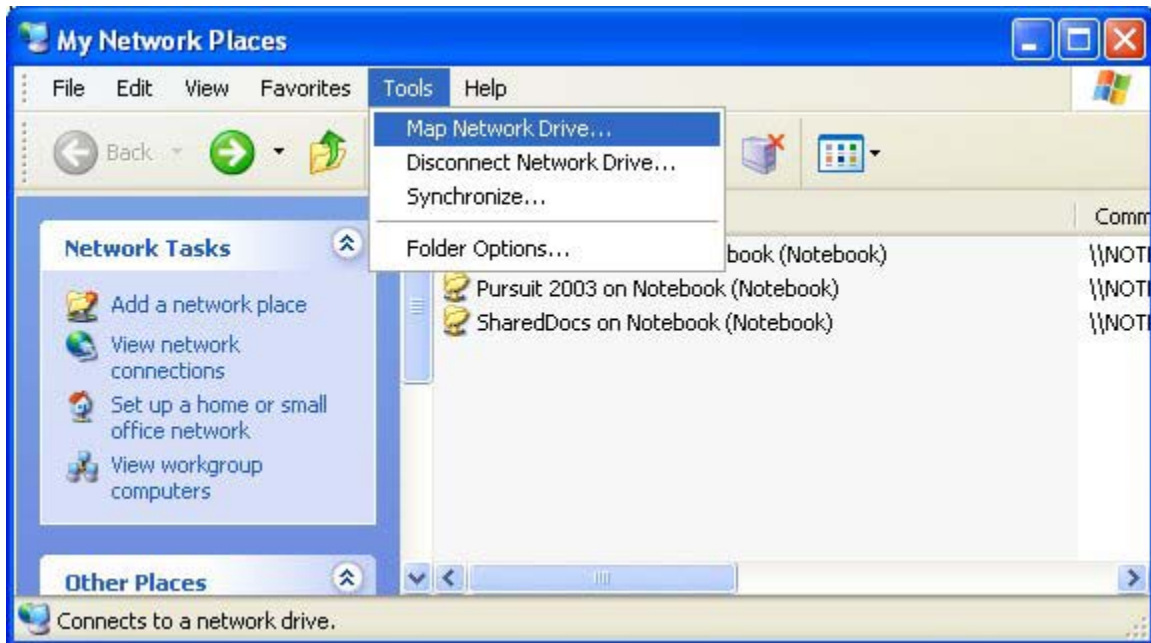
**Windows '98** - double left click on the **SERVER NAME** (name of the computer sharing Pursuit Edition 7). In our example, **NOTEBOOK** is the server. A window will open showing the **SHARED** resources for the **NOTEBOOK** computer. Right click on the shared folder (usually Pursuit Edition 7), then left click on **MAP NETWORK DRIVE**. Select the drive letter to assign to the shared resource. In our example we will use the Drive letter Z:\. The path will show \\SERVERNAME\Pursuit Edition 7 or the name of your Pursuit Edition 7 folder. Make sure there is a check mark in **Reconnect at Logon**. This will make sure that each time you log into your network, these settings will be saved.

**Windows XP** – After opening the My Network Places window, you will see all of the shared resources on your network.



Find the Pursuit Edition 7 folder, (in our example Pursuit Edition 7 on Notebook) highlight the folder with a single left click.

From the menu bar select **TOOLS** and then **MAP NETWORK DRIVE**.



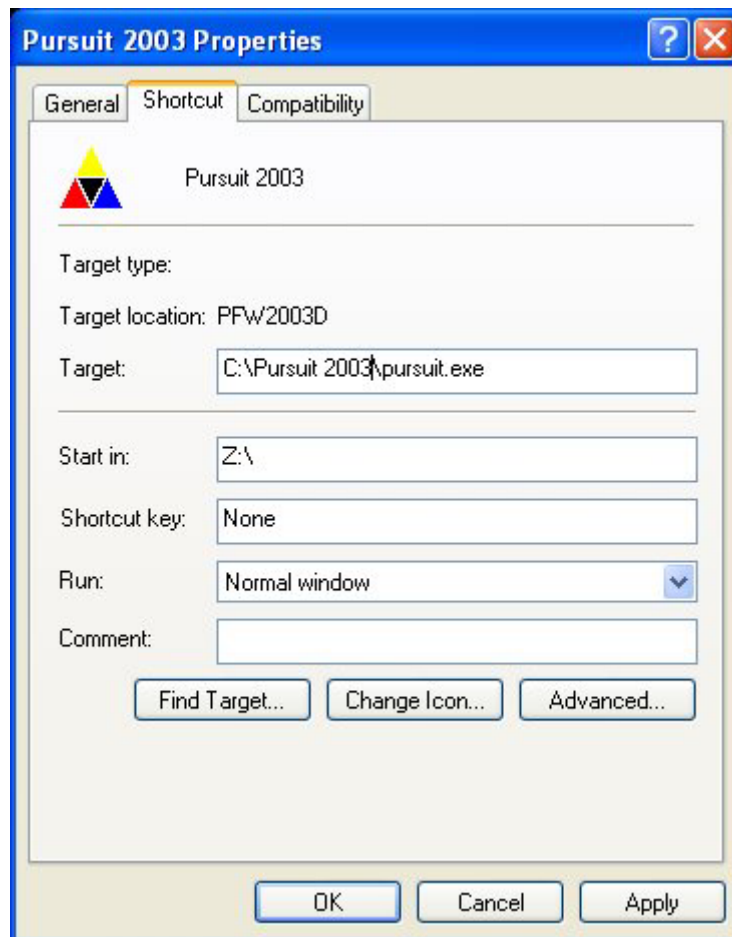
A window will popup that shows the drive letter to be assigned (in our example Z:) you can use any available drive letter, to select another drive letter, click on the **DRIVE** drop down box. Now click on the **BROWSE** button and highlight **\\SERVERNAME\Pursuit Edition 7** then click OK.



Once you have selected the shared drive to map, make sure there is a check mark in

**RECONNECT AT LOGON** then click on **FINISH**.

The final step of the network setup is to create a short-cut to the LOCAL or WORKSTATION copy of Pursuit Edition 7. Go to **Windows Explorer** (Windows '98) or **My Computer** (Windows XP) double click on the drive where Pursuit Edition 7 was installed (usually C:\Pursuit Edition 7) then double click on the Pursuit Edition 7 folder. Scroll down the file list till you find the Pursuit.exe or Application file. Then **RIGHT** click on it and left click on **SEND TO** then **DESKTOP (Create Short-cut)**. Close the Explorer or My Computer window. On your DESKTOP you should now have an icon for Pursuit Edition 7. **RIGHT** click on the icon, then left click on **PROPERTIES**.



The **START IN:** location will read C:\Purwin7. **CHANGE** to **Z:\** (or the drive letter you selected when mapping the drive from the server). Click on **APPLY** then **OK**. Now double left click on the Pursuit icon to start the Pursuit Edition 7 program.



## Selecting a Printer

Pursuit Edition 7 uses the printer driver(s) that are already installed in your Windows system. You do not need to setup any printer selection before using Pursuit Edition 7 for the first time. Pursuit will use the default printer driver you have set in Windows.

All areas of Pursuit Edition 7 that allows printing (reports, proposals, mail merges, etc) includes a 'Print Setup' button. You may use this button to change the default printer that will receive the printed output. The following examples show how you can fully utilize the windows printer drivers if you have more than 1 printer:

- Choose your main printer as the 'default' printer within the Windows Control Panel (Printer icon). All printing done within Pursuit will automatically be routed to this printer.
- If you wish to print to a different printer, you may choose a different printer from the Windows printer selection list by clicking on the 'Print Setup' button that is available in all print sections of Pursuit, then choose the appropriate printer.
- Pursuit Edition 7 includes a built-in Adobe PDF writer for automatic emailing of proposals. You do not need to install the Adobe PDF Distiller for Pursuit Edition 7 proposals, however if you wish to create any other Pursuit printout as a PDF format you would need to purchase a PDF creation tool such as Adobe Acrobat distiller and use it as a printer driver.

The Windows printer selection list lets you choose which printer port you will be printing to. If you have more than 1 printer, it is usually recommended to have both printers listed in the Windows printers selection list with the appropriate printer port selected for each printer.

## ***Running Pursuit For The First Time***

The following instructions need to be followed based upon the type of installation you are performing. There are three scenarios in how Pursuit is typically used:

1. **SINGLE** On a standalone computer (ie: Pursuit installed on just one computer)
2. **NETWORK** In an office network environment (ie: Pursuit is installed on the server and on workstations connected to the server.
3. **MULTIPLE** Pursuit will be installed on a combination of computers, some of which are networked together and others which will be operating with a separate database of Pursuit that may or may not need to be synchronized back to the 'main' Pursuit database at some future time. Examples of this scenario include sales people that take their laptops with them to create proposals during outside sales visits and then need to synchronize their new proposal back to the office Pursuit database.

Let's take a look at each type installation one at a time to see what special setup information needs to be entered into Pursuit:

### **SINGLE**

This is the simplest form of installation, since there is only one Pursuit database and no synchronization requirements with any other copy of Pursuit.

When you run Pursuit for the first time in this type of configuration, you will be prompted to enter a Site ID and Parent ID. **ENTER B100 in both fields.**

Then, when you fill in your Company Header (see Company Header in System Setup chapter below) enter a '1' in the 'Unique Branch/SalesRep Code' field of that screen.

You are now ready to go to the 'Integrating With Alarm or Service Express' chapter.

### **NETWORK**

This also is actually a simple setup for Pursuit when you run it for the first time. Since Pursuit in a network environment shares the same one Pursuit database, there is no synchronization between workstations and the server. Therefore, when you are prompted to enter a Site ID and Parent ID, **ENTER B100 in both fields.**

Then, when you fill in your Company Header (see Company Header in System Setup chapter below) enter a '1' in the 'Unique Branch/SalesRep Code' field of that screen.

You are now ready to go to the 'Integrating With Alarm or Service Express' chapter.

### **MULTIPLE**

This type of Pursuit installation is more complex due to the requirements of having each separate database of Pursuit identified uniquely so that their databases may be synchronized (merged) together on an ongoing basis. The following instructions should be followed carefully, and we recommend that if you will be synchronizing separate databases of Pursuit together (ie: salesrep laptops with main office database) that you also carefully read the 'ProSync' Documentation that is included with Pursuit 7.

First bring up Pursuit on your network (it doesn't matter if you run it from the server or a workstation connected to the server – as long as you have Pursuit networked correctly as described in the previous network setup chapter). You will be prompted to enter a Site ID and Parent ID. **ENTER B100 in both fields.** You are now set to use Pursuit within your network environment for all workstations and the server.

Next, make sure Pursuit is installed on one of the individual computers that will also have a copy of Pursuit and it's own database (ie: Salesrep laptop). Make sure the laptop is NOT connected to the network when performing this next step. Bring up Pursuit on the individual computer and you will be prompted to enter a Site ID and Parent ID.

The Site ID MUST be unique to any other copy of Pursuit. Since the Network (also known as 'Parent') copy of Pursuit is the primary main database, it has already been assigned with the Site ID of B100 (see above). Therefore, this individual computer must have a different Site ID, and one that has not been used by any other individual computer yet.

We highly recommend using the following numbering convention when assigning a Site ID to individual computers. Starting with B110 and incrementing in steps of 10, assign each individual computer a unique Site ID. So if this is the first individual computer you are setting up with it's own copy of Pursuit, enter **B110** in the Site ID field. Although you can enter any number higher than B100 in this field, this is the recommended convention.

The Parent ID will ALWAYS be **B100** (since that is the ID we assigned to the network database earlier).

Repeat this process for each additional individual computer that will be running it's own copy of Pursuit, adding 10 to the Site ID each time to ensure each individual computer has a unique Site ID (make sure to always place the letter B in front of the number).

The last step will be to go into the Company Header screen of Pursuit (see Company Header instructions in the System Setup chapter below) and enter a unique ID in the 'Unique Branch/SalesRep Code' field. Since the primary database on the network is always going to be 1, you need to enter a number higher than that, which has not already been used on another individual installation of Pursuit. So if this is the first individual computer being setup, enter a '**2**' in this field.

Then for each additional computer that will have it's own installation and database of Pursuit, make sure to increment this field to a higher number, always maintaining a unique number amongst all installations of Pursuit you have in your organization.

The Unique Branch/Salesrep Code is then used throughout Pursuit as the prefix to all unique prospect numbers, proposal numbers, etc so that it does not share the same number as another copy of the Pursuit database and is therefore eligible to be synchronized into the main Purusit database at a later time.

## ***Integrating Pursuit With Alarm or Service Express***

Integrating Pursuit with Alarm or Service Express is a simple process, but must be setup on a workstation by workstation basis. Since Pursuit 7 is installed into it's own directory, it needs to know where the Alarm database is stored on your network.

You do NOT need to perform these instructions if you will not be integrating Pursuit with the Alarm or Service Express software.

First, go to the server and bring up Pursuit. Go to Utilities and select 'Reset Alarm Integration Path On This Workstation Only'. Select 'Yes' for 'Will you be integrating Pursuit with Alarm or Service Express'.

You will then be prompted to enter the directories for two paths:

### **Select Location Of Alarm Data Files**

Click on the [...] button to bring up a directory tree of your network. Drill down to find the location ON YOUR SERVER where your Alarm database is stored and click on the folder name.

### **Select Location Of Pursuit Data Files**

Click on the [...] button to bring up a directory tree of your network. Drill down to find the location ON YOUR SERVER where your Pursuit 7 database is stored and click on the folder name.

You are now setup on this workstation to integrate Alarm or Service Express with Pursuit.

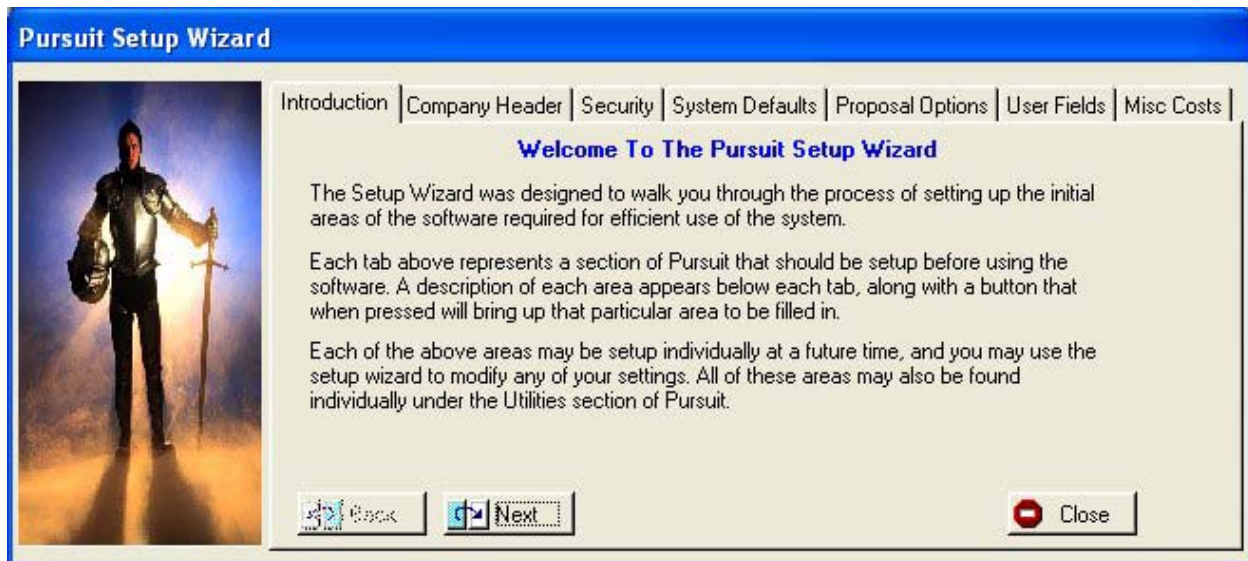
Repeat this process for EVERY workstation AND server that is running Pursuit on this network. You do not need to perform this process on individual computers that will be running separate copies of Pursuit with their own database.

## System Setup

Pursuit Edition 7 contains a variety of new settings that help in the overall use of the system. Some of these settings include defaults for report options, user-selectable colors for the printed proposal, security administration, and defaults for new prospects and new proposals.

Upon installation of Pursuit Edition 7, we **HIGHLY** recommend you run the Setup Wizard by going to File/Setup Wizard. This will walk you through the various setup screens in Pursuit that are designed to set default and options geared to making Pursuit simple to use.

## Setup Wizard



### Company Header Tab

Your company information is entered here, along with overall operational settings. You may also set your Pursuit background (wallpaper) here.

### Security Tab

Consists of security settings for each user.

### System Defaults Tab

Various Prospect and proposal default settings

### Proposal Options Tab

Set up the proposal heading options for each section of the printed proposal (ie: Overview, Details, Equipment, Closing, etc.)

### User Fields Tab

Set up your user-defined labels for the various user-defined fields on the Prospect and Proposal screens.

### Misc Costs Tab

Additional Cost Codes Master Table.

The following pages describe each of these setup wizard sections in detail

## Company Header

The company header is used to enter your company name and address, as well as certain overall settings that will be used in Pursuit.

**Company Name & Address Setup**

Record will be Changed

**Company Information**

Company: All American Security, Inc.  
Street: 498 Main Street  
Street 2:  
City: Anytown  
State: AZ Zip Code: 85323  
Phone 1: 800-555-4982  
Phone 2:  
Fax: 800-555-8712  
License: 50124-B

**Pursuit Setup Options**

Print Letterhead On Proposals: Yes  
Proposal Print Style: Modern  
Print Part Locations: Yes  
Print Part Category: Yes  
Print Part Numbers: Yes  
Display Privacy Screen: Yes  
Unique Branch/Salesrep Code: 1  
Activate Password Protection: No  
Integrate With Alarm or Express: Yes

**Proposal Footer Options**

Website URL: http://www.z-microtech.com  
Email Address: support@z-microtech.com  
Email Address: sales@z-microtech.com  
Print Footer: Yes  
Department: Support  
Department: Sales

**Wallpaper Options**

Optionally set your own company logo or graphic image to be used as Pursuit wallpaper

Wallpaper Background: C:\PFW\2003D\PFWBACK2.GIF  
Wallpaper Positioning: Tile

OK Cancel

### Company/Address/Phone

Your company name, address and phone numbers as it is to appear on proposals (you may also use a graphic image logo for printing on proposals – see Print Proposal Tab on the 'Set System Default' section below).

### License

Your state license number (if required) to print

### Print Letterhead

To print the above name and address on your proposals select Yes, otherwise select NO if you are using preprinted stationary or a graphic logo.

### Proposal Print Style

There are 4 style sheets to choose from:  
*Classic* Times New Roman Font (serif)  
*Modern* Arial Font (sans serif)

*Simple*            Arial Font (sans serif) with no boxes  
*One-Page*        Condensed version of Modern

**Print Part Locations**

Select Yes to print part location field on detailed equipment section of Proposal. Select No to omit location (If you are subtotaling printed equipment list by Location make sure to select Yes)

**Print Part Category**

Select Yes to print part category on detailed equipment section of Proposal. Select No to omit part category (If you are subtotaling printed equipment list by Part Category make sure to select Yes)

**Print Part Numbers**

Print Part ID (Part Unique Identifier) on printed proposals. Select No to omit printing of part numbers (useful if you do not wish competitors to see your exact part numbers for comparison pricing)

**Display Privacy Screen**

If you will be creating proposals in front of a prospect, you may want to turn off pricing and costing fields that are displayed on the screen of Pursuit. Select YES for these fields to be hidden, otherwise set to NO for normal Pursuit proposal mode.

**Unique Branch/Salesrep**

If you will be installing Pursuit Edition 7 on more than one computer (IN A NON-NETWORK ENVIRONMENT ONLY!!), then each computer that will have Pursuit Edition 7 installed should have a unique number setup in this field. For example, your main computer in the office would have a selection of 1. One of the sales persons laptop computer would have a selection of 2, the next sales persons' laptop computer would have a 3, and so on for each separate computer using Pursuit that will not be connected to the network when creating proposals (used mainly for your sales staff taking laptop's out in the field to generate proposals).

This is used to uniquely identify each copy of the Pursuit database (each prospect and proposal created will have this code appended as a prefix to their prospect number and proposal number). A separate synchronizer module for Pursuit Edition 7 (ProSync) allows the synchronization of independent Pursuit databases (ie: salesrep laptops) into your central Pursuit database in the office. Please call Z-Micro Technologies, Inc. for more information on the synchronizer if you will be using Pursuit in this manner.

**Activate Password**

Select YES if you wish to active the security controls available in Pursuit Edition 7. When you select YES the security administration list will pop-up. Please be sure to enter at least 1 userid and password if you will be using

security in Pursuit, otherwise you may lock yourself out of the system without any userids to get. The security area of Pursuit is explained below.

**Integrate With Alarm/Express** If you will be using Pursuit in conjunction with our Alarm or Service Express billing packages, select YES. This activates internal settings for the integration of Pursuit and these programs. See instructions in the previous chapter for setting up integration with Alarm.

**Proposal Footer Options** The fields below are for printing as a footer on proposal pages only. These fields will only print if 'Print Footer' is set to Yes.

**Website URL** Your website URL to print as a footer on proposals

**Print Footer** Select Yes to print footer on bottom of proposals. Select NO to Omit printing of footer.

**Email Address** First email address for your company

**Department** Name of department for the first email address (ie: Sales)

**Email Address** Second email address for your company

**Department** Name of department for the second email (ie: Support)

**Wallpaper Options** The following two fields allow you to select your own background to appear on the Pursuit screen (wallpaper). Potential uses for setting your own wallpaper include your company logo, motivational graphics, message (as a graphic image), etc. Wallpaper will be seen by all users of Pursuit as their background image.

**Wallpaper Background** Select the graphic image to be displayed as background within Pursuit. Supported graphic images include valid Bitmap, Jpeg, or GIF images.

**Wallpaper Positioning** Select placement of wallpaper image on Pursuit screen:

*TILE* Repeat image to cover screen (useful if graphic image is very small and looks good repeated on screen such as company logo image)

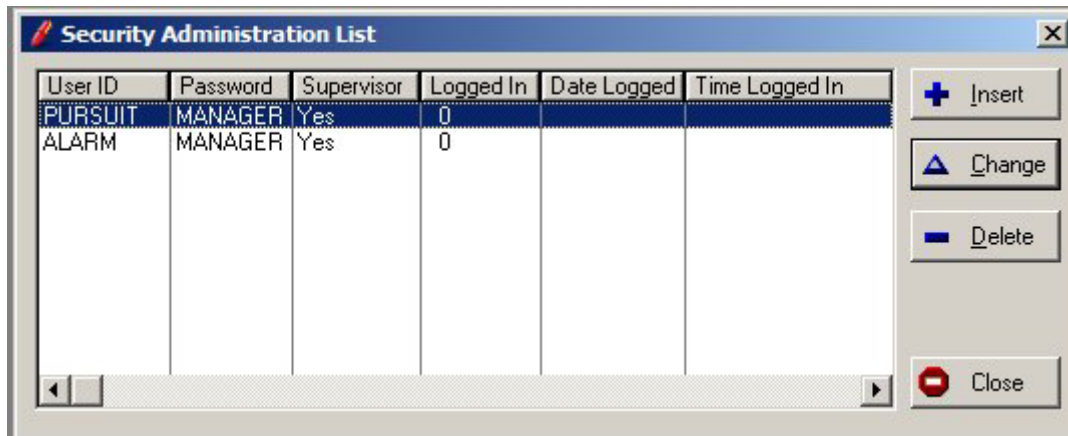
*STRETCH* Resizes graphic image to fit background size. May or may not look good, depending upon dimension and size of your original image (looks best when aspect ratio of graphic image is close to aspect ratio of Pursuit background screen).



<i>CENTER</i>	Places graphic image in center of Pursuit background screen with original size and aspect ratio (does not stretch or tile).
<i>NONE</i>	Turns off wallpaper display (default gray screen background will be displayed).

## Security Administration

The security section of Pursuit Edition 7 allows only authorized users access to various sections of the system. You may have an unlimited number of users listed in this area. Only supervisors (Supervisor=Yes in the Security Profile screen) are allowed to add, modify, or delete their own or other user profiles. Please be sure to select Supervisor for ONLY those persons that should have complete access to all areas of Pursuit.



Click on INSERT to add a new profile, or select CHANGE to modify an existing profile:

## Security Administration – System Access Rights

The security administration area consists of the following fields:

**User ID** Enter a unique ID of the user that will be used to sign on for this person.

**Password** Enter a unique password for this user. The password is case sensitive and therefore must be entered exactly in the same upper-case/lower-case characters used in this field when user is signing on to Pursuit.

**Salesrep ID** Identifies the Salesperson (or employee) related to this User ID.

**Supervisor** Select Yes only if this user is allowed complete access to all areas of Pursuit, including this security section to set security for all users.

**Restrict To 1 Log** Select Yes if you do not want to be able to launch multiple sessions of Pursuit by the same User ID. Select No to allow the same user to log into multiple sessions of Pursuit.

**Prospects** Allows access to the Prospect Maintenance section

*Add* Click on this box to RESTRICT adding new prospects  
*Modify* Click on this box to RESTRICT modifying existing prospects  
*Delete* Click on this box to RESTRICT deleting existing prospects.

<b>Proposals</b>	Allows access to the Proposal Generation section
<i>Add</i>	Click on this box to RESTRICT adding new proposals
<i>Modify</i>	Click on this box to RESTRICT modifying existing proposals
<i>Delete</i>	Click on this box to RESTRICT deleting existing proposals.
<b>Follow-Ups</b>	Allows access to the Prospect Follow up (Call) notes
<b>Inventory</b>	Allow access to the inventory section of Pursuit
<i>Add</i>	Click on this box to RESTRICT adding new inventory items
<i>Modify</i>	Click on this box to RESTRICT modifying existing inventory items
<i>Delete</i>	Click on this box to RESTRICT deleting existing inventory items.
<b>Reports</b>	Allow access to the entire report section of Pursuit (individual reports may be authorized/unauthorized as described on the next page.)
<b>Utilities</b>	Allow access to the entire Utility Menu (non-supervisors will not have access to Security Administration even if they have access to the Utilities area).
<b>Calendar</b>	Allow access to the Appointment Calendar area.
<b>Mail Merge</b>	Allow access to the Mail Merge/Prospect Inquiry area
<b>Call Center</b>	Allow access to the Call Center section of Pursuit
<b>Rolodex</b>	Allow access to the Personal Rolodex area (each user may have a personal rolodex list that will display name and addresses in the rolodex area that only that person entered).
<b>Group Rolodex</b>	Allow access to the Group Rolodex area (group rolodex contains all names in the rolodex area).
<b>XML Export</b>	Certain major lists in Pursuit (Prospects, Proposals, Inventory) have the ability to be exported to the common XML file format (this allows importing this information into Excel and other XML compatible programs). If you do not want this user to have the ability to export information out of Pursuit, select NO.

**Security Administration - Report Access Rights Tab**

The screenshot shows a dialog box titled "Security Administration Profile" with a close button in the top right corner. Below the title bar, it says "Record will be Changed". There are two input fields: "User ID" containing "PURSUIT" and "Password" containing "MANAGER". A red warning message reads "Only Supervisors May Add/Modify/Delete Security Profiles". Below this are three tabs: "System Access Rights", "Report Access Rights" (which is selected), and "Advanced". The "Report Access Rights" tab contains a list of reports with corresponding dropdown menus, all set to "Yes":

Report Name	Access Rights
Prospect List	Yes
Proposal Report	Yes
Job Cost	Yes
SalesRep Performance	Yes
Time And Expense	Yes
Sales Lead Analysis	Yes
Inventory List	Yes
Proposal Disposition	Yes
Purchase Ordering	Yes

At the bottom of the dialog box are two buttons: "OK" with a green checkmark icon and "Cancel" with a red X icon.

This tab screen provides security access control to every report available within Pursuit.

## Security Administration - Advanced Tab

The screenshot shows the 'Security Administration Profile' dialog box with the 'Advanced' tab selected. The title bar reads 'Security Administration Profile'. Below the title bar, it says 'Record will be Changed'. The form contains the following fields and options:

- User ID: PURSUIT
- Password: MANAGER
- Salesrep ID: JRW
- Restrict To One Log In: No
- Supervisor: Yes
- \* Only Supervisors May Access Security Profiles
- System Access Rights | Report Access Rights | **Advanced** | Timeout
- Restrict User To View Own Records Only: Select YES To Restrict This User To Only View And Access Their Own Prospect/Proposal/Followup Records
- Access This Users Records Only: No
- Salesrep ID For This User: [Empty field]
- SalesRep ID Identifies Records Belonging To This User
- Allow Financial Tab Access On Proposal: [Empty dropdown]
- Restrict Price Modifications on Financial Tab:
- Buttons: OK (with green checkmark), Logged In (checkbox), Cancel (with red X)

### Access User Records Only

If you wish to restrict a user from viewing ONLY their own prospects and proposal records that are assigned to them (based upon the Salesrep ID below), then select Yes. This is a powerful utility that allows you to distribute the entire Pursuit database to individual notebook computers for use by each sales person, yet each person can only see his/her own prospects and proposals related records. This utility is only active if you turn on the security protection feature of Pursuit.

### Salesrep ID

Since a sales person will usually sign-in to Pursuit using a User ID, this User ID may be different then their Salesrep ID (as assigned in the Sales Rep List Validation Table). Therefore, enter only the Salesrep ID of this user as they are identified in the Prospect and Proposal sections so that Pursuit can identify only those records belonging to that sales person if this security feature is activated.

### Allow Financial Tab Access

Selecting No restricts this user from accessing the Financial Tab on a proposal – which contains job markup overrides, payment terms, and job costing information.

### Restrict Price Modification

(N/A if No selected above). If user is to have access to Financial Tab but should not be allowed to modify job price overrides or payment terms, check this box.

## Set User Definable Fields – Prospects and Proposals

**User Definable Fields Setup**

Prospect Screen Definable Fields | Proposal Screen Definable Fields

This area determines the description that will appear for each user-definable field in the prospect custom field screen

User Field 1	Bldg Sq Footage	User Field 9	User Field 9
User Field 2	User Field 2	User Field 10	User Field 10
User Field 3	User Field 3	User Field 11	User Field 11
User Field 4	User Field 4	User Field 12	User Field 12
User Field 5	User Field 5	User Field 13	House Style
User Field 6	User Field 6	User Field 14	User Field 14
User Field 7	User Field 7	User Field 15	User Field 15
User Field 8	User Field 8	User Field 16	User Field 16

OK

Cancel

Pursuit features a number of user definable fields in the prospect and proposal generation area. There are 16 text fields in the prospect area and 16 text fields in the proposal area that may be used for any purpose you wish. To label these fields for your own purpose, go into the Set User-Definable Fields area in the Utilities section.

The Proposal User-Definable fields also have a checkbox next to each field that allows you to select if you wish that particular field to be printed on the proposal (for printing in the User-Defined section of printed proposals):

**User Definable Fields Setup**

Prospect Screen Definable Fields | Proposal Screen Definable Fields

This area determines the description that will appear for each user-definable field in the proposal custom field screen.  
Click On CheckBox To Print Field On Proposal

Proposal Heading For User-Definable Fields: \_\_\_\_\_

User Field 1	User Field 1	<input type="checkbox"/>	User Field 9	User Field 9	<input type="checkbox"/>
User Field 2	User Field 2	<input type="checkbox"/>	User Field 10	User Field 10	<input type="checkbox"/>
User Field 3	User Field 3	<input type="checkbox"/>	User Field 11	User Field 11	<input type="checkbox"/>
User Field 4	User Field 4	<input type="checkbox"/>	User Field 12	User Field 12	<input type="checkbox"/>
User Field 5	User Field 5	<input type="checkbox"/>	User Field 13	User Field 13	<input type="checkbox"/>
User Field 6	User Field 6	<input type="checkbox"/>	User Field 14	User Field 14	<input type="checkbox"/>
User Field 7	User Field 7	<input type="checkbox"/>	User Field 15	User Field 15	<input type="checkbox"/>
User Field 8	User Field 8	<input type="checkbox"/>	User Field 16	User Field 16	<input type="checkbox"/>

OK

Cancel

## Set System Defaults

The System Defaults area should be setup for your company to assist in the creation of new prospects and proposals. The following defaults may be setup in this area:

### Prospects Tab

The screenshot shows the 'Set System Defaults' dialog box with the 'Prospects' tab selected. The dialog has a title bar and several tabs: 'Font Style', 'Email Settings', 'Inventory', 'Prospects', 'Prospect Report', 'Proposals', 'Proposal Report', and 'Print Proposal'. The 'Prospects' tab is active, showing the following fields and their values:

Field	Value
State	
Tax Code	Phoenix
Tax Code Field Label	TaxCode
Account Type	Prospect
Property Type	Res
SalesRep ID	JRW
Display Prospect Count	Yes
Hide Inactive Prospects	No
Map Directions Source	Company Address

Buttons for 'OK' (with a green checkmark) and 'Cancel' (with a red X) are located in the top right corner of the dialog.

- State** Enter your 2 letter state code. This will be the default state code for each new prospect you enter into Pursuit.
- Tax Code** Enter the default sales tax code for most of your prospects.
- Tax Code Label** Enter the label you wish to assign to the Tax Code field (TaxCode is common). This could also represent a municipality (County) or other type of label that best describes the tax code.
- Account Type** Enter the default account type (Usually Prospect).
- Property Type** Enter the default Property Type (Res/Comm).
- Salesrep ID** If most of the prospects and proposals are generated by one particular sales person, enter that salesrep ID in this field, otherwise leave blank.
- Display Prospect Count** Select Yes to show the prospect counter on the Prospect List screen, otherwise select No to hide this counter.
- Hide Inactive Prospects** Select Yes to hide prospects that have a checkmark in the 'Inactive Prospect' checkbox on the bottom of the prospect screen, otherwise select No.
- Map Directions Source** For Google Map link, select if 'Source' address should be your main company address, or the address of the salesrep assigned



## Prospect Report Tab

The screenshot shows a dialog box titled "Set System Defaults" with a blue header. It has several tabs: "Prospects", "Prospect Report", "Proposals", "Proposal Report", and "Print Proposal". The "Prospect Report" tab is selected. The dialog is divided into two sections: "Font Style" and "Email Settings". Below these are several settings, each with a dropdown menu:

Setting	Value
Print Contact List	YES
Print Comment Section	YES
Print Follow-Up Notes	YES
Print Demographics	YES
Print User-Defined Fields	YES
Account Status	All
One Page Per Prospect	YES

On the right side of the dialog, there are two buttons: "OK" (with a green checkmark icon) and "Cancel" (with a red X icon).

This tab defines the default settings for the Prospect report

- |                                 |   |
|---------------------------------|---|
| <b>Print Contact List</b>       | Include the additional contact list on the prospect report.   |
| <b>Print Comment Section</b>    | Print comment (notepad) section of the prospect record.   |
| <b>Print Follow-Ups</b>         | Print the Follow-Up (Call Notes) records for this prospect.   |
| <b>Print Demographics</b>       | Print the Demographic section of the prospect record.   |
| <b>Print User-Defined Field</b> | Include the user-defined fields on the prospect report  |
| <b>Account Status</b>           | Select if this report normally prints for a particular type of account (Prospect/Customer/Other). Usually left blank.   |
| <b>One Page Per Prospect</b>    | If you wish a condensed printout of your prospect list, select Yes. If Yes is selected, the above selections will have no bearing on the final printed report. Each prospect will be represented with 1 line showing prospect name, address and phone number. |

## Proposals Tab

The screenshot shows the 'Set System Defaults' dialog box with the 'Proposals' tab selected. The 'Form Title' field contains the text 'Proposal'. Other fields include 'Proposal Date Field Label', 'Probability' (Low), 'Job Status' (Reviewing), 'Withdraw In' (30 Days), 'Buy Terms' (Own), 'Line Color For Open Proposals' (Green), 'Default Taxable Status' (Yes), 'Show Labor Separately' (No), 'Markup Percent Basis (Optional)' (Cost), 'Change Site Address on Proposal', and 'Select Inventory By' (Part ID). The 'OK' and 'Cancel' buttons are visible on the right side of the dialog.

The Proposals tab sets default settings for new Proposals

### Form Title

Pursuit normally labels printed proposals with the title PROPOSAL on the top of the printed form. If you wish to title your printed proposals with a different title (such as Bid, Quote, Estimate, etc.) then enter your title in this field.

### Proposal Date Label

If you changed the title of the proposal in the above field, you may also wish to change the normal 'Proposal Date' label that Pursuit prints on the proposals with a different date label such as Bid Date, Quote Date, etc.

### Probability

Enter the default probability level when you create a new proposal. Typically the default selection for this field would be Low on new proposals.

### Job Status

You may default each new proposal to a certain Job Status value. Job Statuses are created by the Pursuit user for any purpose you desire. Some examples of a job status might include Contract, On Hold, Review, Presented, etc.

### Withdraw In

To print a 'Withdraw In' terms on the proposal to show the pricing is only good for a certain number of days from presentation of the proposal, enter your default Withdraw In days in this field.

### Buy Terms

Indicate if most of your systems are Owned Or Leased by the customer.

**Line Color For Open Proposals**

You may select the color which is displayed for open proposals on the Proposal List screen. This makes identifying open proposals on the proposal list much easier.

**Default Taxable**

Select YES if most items placed on proposal are taxable, otherwise select NO. Taxable status for each item on the proposal may be overridden on the proposal.

**Show Labor**

Select YES to print labor charges separately (under the Subtotal section of the proposal), otherwise select NO (default). This feature is used only if you set labor charges for items in Inventory (Cost Tab in Inventory). To show labor separately on proposal, the appropriate labor charge must be in the 'Labor Charge' field of each item listed on the proposal (which defaults from the Labor charge of the item in inventory).

If you do not want to use the 'Labor Charge' field of the items listed on the proposal, you may enter Labor for the entire job separately as a line item on the Proposal. For example, create an item in Inventory called 'Labor' (with a Part Category of LABOR) and then when creating a proposal add a new line item (Labor selected from Inventory) and enter the total labor price. This will then show as a separate line item on the item list of the proposal – at the END of all listed items (assuming you have LABOR as the Part Category).

If you do not wish to show labor charges separately on your printed proposal set this field to NO. Only prices charged for each item will then be used on the proposal.

**Markup Basis**

Pursuit supports two types of markup calculations:

*Cost Basis:* Select COST if you will be marking up the price of a job based upon a percent of the total cost of the job.

*Price Basis:* Select PRICE if you will be marking up the price of a job based upon a percent of the calculated price of items listed.

**Change Site Address**

Determines if Site Information on proposal should change when Prospect Account is changed for that proposal.

**Select Inventory By**

Users have a choice of determining how an item in inventory is normally selected from the Inventory List. Default is normally Part ID, however you may also set the default identifier by Manufacturer ID or UPC Code (helpful for bar code situations).

## Proposal Report Tab

The screenshot shows the 'Set System Defaults' dialog box with the 'Proposal Report' tab selected. The settings are as follows:

Setting	Value
Print Prospect Details	YES
Print User Defined Fields	YES
Specific Salesrep	
Probability Level	Low
Purchase Terms	Own
Disposition	Open

You may select various default settings for the Proposal Report

<b>Print Prospect Details</b>	Print proposal details beyond just proposal name and address (provides additional information for each proposal on the report)
<b>Print User Definable Fields</b>	Print the user-defined fields on the proposal report.
<b>Specific Salesrep</b>	Print a proposal report of proposals for a specific salesrep.
<b>Probability Level</b>	Print a proposal report of proposals for a specific probability level.
<b>Purchase Terms</b>	Print a proposal report of proposals for Owned Or Leased systems only.
<b>Disposition</b>	Print a proposal report of proposals based upon a specific disposition (Open,/Won/Lost/Other).

## Print Proposal Tab

Font Style	Email Settings	Inventory
Prospects	Prospect Report	Proposals
Print Proposal Overview Page(s)	YES	Page After <input checked="" type="checkbox"/>
Print Equipment Detail Page(s)	YES	
Sort Detail Page By	DEFAULT	Print Subtotals No
Print Equipment Detail Prices	YES	
Print Optional Equipment List	Yes	Page Before <input checked="" type="checkbox"/> Page After <input checked="" type="checkbox"/>
Print Recurring Charges	YES	
Print Proposal Graphic Images	YES	
Print Total Price Page	YES	
Number Of Copies	1	
Print Closing Remarks Page(s)	YES	Page Before <input checked="" type="checkbox"/>
Logo Graphic File		...
PDF 1 Attached To All Proposals		... 0
PDF 2 Attached To All Proposals		... 0
Print Contract	NO	
Image On Bottom of Contract		...

These default settings determine the way you wish to print your proposals

**Print Proposal Overview Page** Select Yes to print the proposal 'overview text' pages (Introductory text entered in the word processing section of the proposal).

**Page After** Check this box to break to a new page after Introductory Overview page is printed. Leave blank to print Introductory Overview on top of detailed equipment page.

**Print Equipment Detail Page** Select Yes to print the equipment detail list of the proposal

**Sort Detail Page By** You may choose the order in which the equipment is listed. Selections include Default (the way it appears on the equipment list screen), Part (alphabetically by part id), Location (alphabetically by installation location), or Category (alphabetically by part category). Part category and location selections will create a sub-heading above each new category/location for easy identification.

**Print Subtotals** If Items above are sorted by Category Or Location, select Yes to print subtotals under each sorted section. Select NO to omit subtotal printing under each section.

<b>Print Equipment Detail Prices</b>	You may choose to print the price of each equipment item on the proposal by selecting Yes, or select No to disable printing of detail prices.
<b>Print Optional Equipment List</b>	<p>A listing of suggested optional items can be printed on the proposal. Select Yes to print the optional list (when present) or select No to normally ignore optional items that may be entered on the proposal.</p> <p><b>Page Before</b> Put a checkmark if you wish the Optional Items list to start printing on a new page</p> <p><b>Page After</b> Put a checkmark to print a new page after the optional items list has printed (so the optional items list on it's own page).</p>
<b>Print Recurring Charges</b>	If the proposal includes recurring charges, you may select Yes to print those charges on the proposal.
<b>Print Proposal Graphics Images</b>	<p>If you will be including graphic images (photos of parts proposed, spec sheets, etc) then select Yes to have those graphics print (one per page) as part of the proposal. Select No if you do not wish to have any photos printed. Photos can be scanned in with a scanner and saved to your hard drive as a BMP or JPG file using your scanner software. You may then link those files to a proposal within Pursuit.</p> <p>Photos that are attached to items listed on the proposal may also be printed right below each item as it is printed. The option to print graphics below each item or on it's own separate page is selected on the each item listed on the proposal.</p>
<b>Print Total Price Page</b>	The final page of the proposal prints the total price and sales tax, along with your terms and conditions. Select Yes to print this page as part of the proposal printout.
<b>Number Of Copies</b>	Usually set to 1, this allows multiple copies of the proposal to print at one time.
<b>Print Closing Remarks Page</b>	<p>Select YES to print your closing text.</p> <p><b>Page Before</b> Place a checkmark in this box to page break before printing the Closing text. Clear this checkbox to print the closing text right after detail section.</p>
<b>Logo Graphic File</b>	To use your own logo on the top left corner of proposals, select the appropriate graphic file on your computer or network that contains your company logo and name/address. The graphic image should be a BMP image, and should be in the approximate dimensions of 3" wide by 1" high (Pursuit will stretch the image to fit this space).

To print just your name and address as text on the upper left-hand corner of the proposal pages, leave this section blank and make sure to select YES to 'Print Letterhead On Proposal' on the Company Header screen.

**PDF 1 Attached**

You may select up to two PDF documents that will, by default, always be attached to any proposal you create. To select the first PDF document, click on the [...] lookup button to bring up a directory tree of your network. Select the appropriate PDF document. You may always delete this document from any particular proposal by clicking on the PDF button on top of the proposal screen.

**Counter:** Indicate the order in which this document should print in connection to other PDF documents. For example, enter 1 in this field to indicate that this document should print first regardless of any other PDF documents that may be attached to the proposal.

**PDF 2 Attached**

If you have a PDF document selected in the first field above and wish to place a second PDF document on every proposal you create, select the filename of the second PDF by clicking on the [...] lookup button to display your directory tree, then select the appropriate file from your list.

**Counter:** Indicate the order in which this second document should print in connection with other PDF documents that may be attached to a proposal. For example, enter 2 in this field to indicate this document will print second in line with any other PDF documents.

**Print Contract**

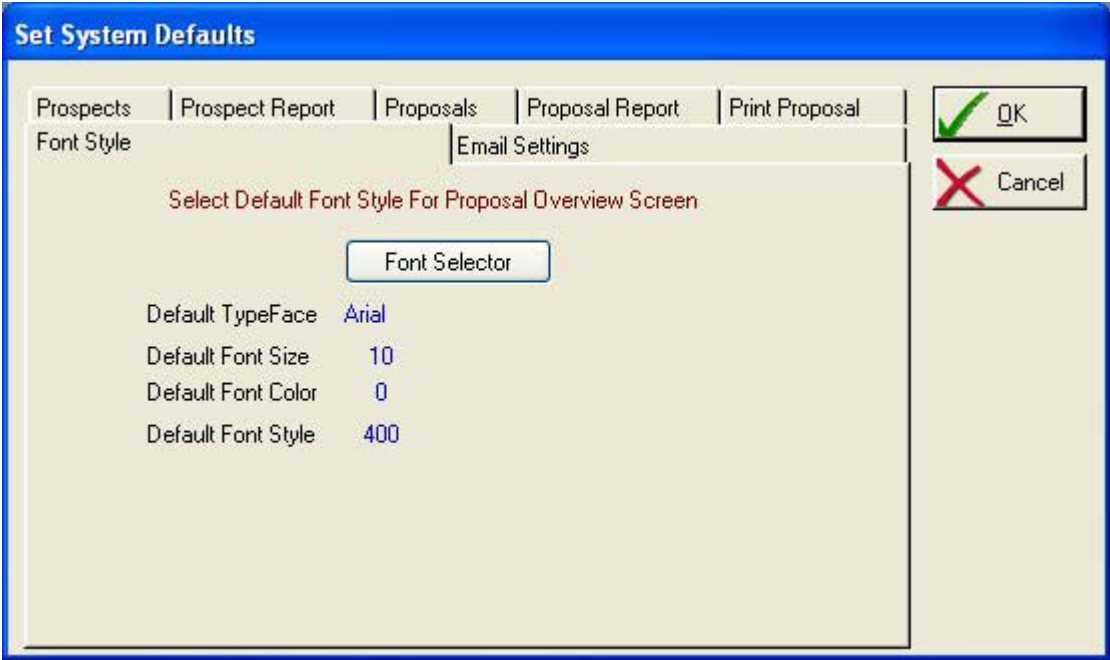
Indicate if you typically want a contract to always print along with your proposal.

**Image on Bottom of Contract**

You can elect to have a graphic image print on the bottom of your contract. Examples of a graphic image you wish to place on the bottom of a contract include your company logo, your signature (you can create your signature with most graphic programs and save it as a graphic image), an advertisement, etc.

If you will be selecting a graphic, the dimensions of the graphic should be 1" high x 7.5" wide. The best way to accomplish this is to create a rectangle in your graphics program, and hide the rectangle lines. Then place your graphic image within that rectangle and save it. This way, your graphic image will not be stretched by Pursuit to fit within the 1" x 7.5" dimensions since your transparent rectangle is already in that size.

# Font Style Tab



These default settings determine which font style you would like to use on the Introductory Over and Closing text sections of your proposals (the RTF sections):

**Font Selector Button**

Click on this button to display the Font Selector. You may choose the typeface, font size, color and attribute (ie: regular, bold, italic) from the selector and the corresponding values will be saved.



## E-mail Settings

The screenshot shows the 'Set System Defaults' dialog box with the 'Email Settings' tab selected. The fields are as follows:

- Prospects | Prospect Report | Proposals | Proposal Report | Print Proposal
- Font Style | **Email Settings** | Inventory
- SMTP Settings For Pursuit Email Features
- Your Email Address: [ ]
- Your Email Name: [ ]
- Your SMTP Server: [ ]
- Text On Subject Line: [ ]
- Message: [ ] (Short Message, To Print On, Email Body)
- Your SMTP Port: 25 (Normal Port Default = 25)
- Email Copy To Sender: [ ] Request Return Receipt: [ ]
- Email Authentication Settings (Optional - Only Fill In If Required By Your Email Server)
- User: [ ] Password: [ ]
- Buttons: OK, Cancel

These default settings determine your e-mail setting defaults. Pursuit Edition 7 can email proposals directly to a prospect by clicking on the EMAIL button in the Print section of a proposal. The proposal is converted automatically to an Adobe Acrobat PDF document and attached to an email that is sent out by Pursuit (no email software is required).

- Your E-mail Address** Enter a valid email address that you send emails from
- Your E-mail Name** Your name as it is to appear on the email
- Your SMTP Server** The SMTP server ID that you use to send out emails (if you do not know your SMTP server name, look in your existing ACCOUNT section of your current email program to see what SMTP server you use, or contact your ISP).
- Text On Subject Line** The text you want Pursuit to place in the SUBJECT line of the proposal email.
- Message** The message to appear in the body of the email (the proposal will be attached as a PDF document, so the body of the email would normally be blank unless you enter a message in this section).
- Your SMTP Port** Default = 25. Normally kept at default setting. If you have difficulties in sending out email, contact your ISP to see if this setting should be different.

**E-mail Copy To Sender**    Select YES to send a copy of email to yourself.

**Request Return Receipt**    If you want to be notified when the email recipient has opened up the email, select YES. If your email server (and their email server) supports return receipt options AND if the recipient agrees to have their email client send a return receipt back to you, you will receive an email to your 'sender email address' verifying they received and opened your email.

**Email Authentications**    If your email server requires authentication on outgoing (SMTP) emails, you may enter the appropriate values below:  
*User*                    Enter your User Account Name as required for authentication by your ISP  
*Password*              Enter your password as required for authentication by your ISP

## Inventory Settings

The screenshot shows the 'Set System Defaults' dialog box with the 'Inventory' tab selected. The 'Default Inventory List To Favorite List View' checkbox is checked, while 'Default Pick List To Favorite List View' is unchecked. Under 'Multi-Level Pricing Defaults', 'Use Multi-Level Pricing' is set to 'No'. There are three empty text boxes for 'Price Level 1 Label', 'Price Level 2 Label', and 'Price Level 3 Label'. At the bottom, there are three empty text boxes for 'Markup Percent On Price Level 1', 'Price Level 2', and 'Price Level 3'. The 'Markup New Items From Cost' dropdown is also empty. The 'OK' and 'Cancel' buttons are visible on the right side.

These default settings determine your inventory defaults.

### **Favorite List View**

Pursuit supports the ability to tag items in inventory that are to appear on the 'Favorites' view of the inventory list. This helps facilitate selecting the most popular items from inventory easily instead of having to browse through potentially thousands of inventory items on the list. If you typically want your Inventory List to always come up by default in Favorite View mode, place a checkmark in this box. Otherwise, leave the box unchecked to display all items on the inventory list.

### **Pick List Favorite View**

When using the Pick List to select items from inventory to place on the proposal, if you want the pick list to display on your favorite items in inventory then place a checkmark in this box. To display all inventory items on the pick list, leave this box unchecked.

### **Use Multi-Level Pricing**

Pursuit support multi-level pricing for items in inventory. Up to 3 levels of prices may be stored and selected when creating a proposal. To setup multi-level pricing select YES in this field. To use just one pricing field per item, select No. These levels will be selectable when building the proposed equipment list for each item that you place on the proposal.

### **Price Level 1 Label**

Only For Multi-Level Pricing  
Enter the label to assign to Inventory pricing level number 1 (ie: Standard)

<b>Price Level 2 Label</b>	<u>Only For Multi-Level Pricing</u> Enter the label to assign to Inventory pricing level number 2 (ie: Service)
<b>Price Level 3 Label</b>	<u>Only For Multi-Level Pricing</u> Enter the label to assign to Inventory pricing level number 3 (ie: Repair)
<b>Markup New Items</b>	Pursuit can automatically populate the pricing fields of new items being added to inventory, based upon a percentage markup of your cost. To activate this feature, select YES.
<b>Markup Price Level 1</b>	<u>Only If Markup Items Activated</u> Enter the percentage that price level 1 will be marked up based upon cost.
<b>Markup Price Level 2</b>	<u>Only If Markup Items Activated</u> Enter the percentage that price level 2 will be marked up based upon cost.
<b>Markup Price Level 3</b>	<u>Only If Markup Items Activated</u> Enter the percentage that price level 3 will be marked up based upon cost.

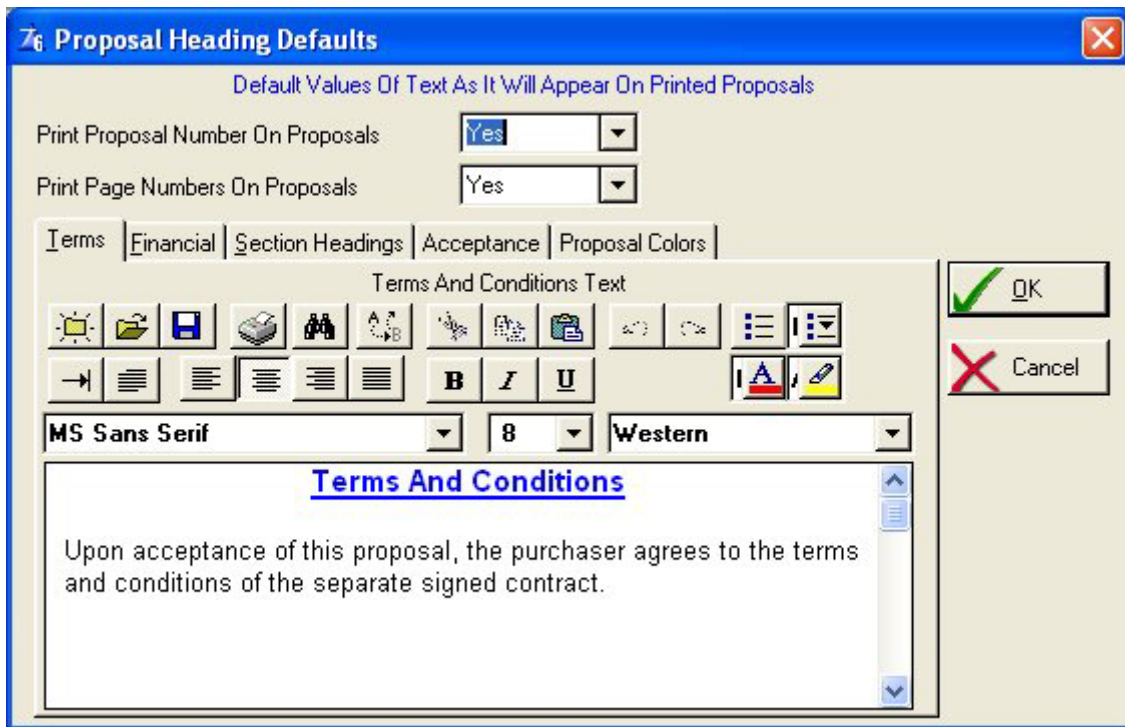
## Proposal Heading Defaults

The section determines the text headings and colors that will appear on the proposal

**Print Proposal Number On Proposals**      Select YES to print proposal number on proposals.

**Print Page Number On Proposals**      Select YES to print page numbers on proposals.

## Terms



### Terms Tab

Enter your terms and conditions as they are to appear on proposal. Usually you should type 'See contract for terms and conditions' since a proposal should not be signed by the customer as a representation of your formal contract. You may use RTF formatting in the Terms box.

## Financial

**76 Proposal Heading Defaults**

Default Values Of Text As It Will Appear On Printed Proposals

Print Proposal Number On Proposals: Yes

Print Page Numbers On Proposals: Yes

Terms | **Financial** | Section Headings | Acceptance | Proposal Colors

Proposal Pricing Description

Price Of Proposed Job

Payment Schedule Description

Payment	Description	Percent Of Job	Value
Payment 1	Signed Contract	Percent Of Job	25.00
Payment 2	Stat Of Job	Percent Of Job	25.00
Payment 3	75% Completion	Percent Of Job	25.00
Payment 4	Job Completed	Percent Of Job	25.00

OK

Cancel

**Proposal Pricing Description** The text as it will appear on the printed proposal describing the Pricing Section (Final Price Page).

### ***Payment Schedule Description***

**Payment 1 – 4** Enter a description of up to 4 different payment stages as it will appear on the proposal pricing section.

**Percent Of Job** If payments are to be calculated as a percent of total price, enter a default percentage for each payment stage.

## Section Headings

**Proposal Heading Defaults**  
Default Values Of Text As It Will Appear On Printed Proposals

Print Proposal Number On Proposals: Yes

Print Page Numbers On Proposals: Yes

Terms | Financial | **Section Headings** | Acceptance | Proposal Colors | Final Pricing Page

Text Pages Section (Overview Area): Introduction

Detail List Section: Proposed Items

Optional Items Section: Optional Items

Recurring Charges Section: Recurring Charges

Pricing Section: Pricing

OK

Cancel

### **Text Pages Section**

This determines the label that will appear on the beginning of the text introductory overview pages of the proposal.

### **Detail List Section**

This field determines the label that will appear on the beginning of the equipment list page(s) of the printed proposal.

### **Optional Items Section**

This field determines the label that will appear on the beginning of the optional items page(s) of the printed proposal.

### **Recurring Charge List**

This field determines the label that will appear on the beginning of the recurring charge list page(s) of the printed proposal.

### **Pricing Section**

Label for pricing page of proposal.

## Acceptance Tab

The screenshot shows the 'Proposal Heading Defaults' dialog box with the 'Acceptance' tab selected. The title bar reads '76 Proposal Heading Defaults'. Below the title bar, the subtitle is 'Default Values Of Text As It Will Appear On Printed Proposals'. There are two dropdown menus: 'Print Proposal Number On Proposals' set to 'Yes' and 'Print Page Numbers On Proposals' set to 'Yes'. The 'Acceptance' tab is active, showing a text area with the text 'Please sign below to indicate your acceptance of this proposal'. Below the text area is a 'Number Of Signature Lines' spinner set to '1'. On the right side, there are 'OK' and 'Cancel' buttons.

The text entered on this tab prints on the bottom of the proposal under signature line.

### Number Of Signature Lines

Select 0, 1, or 2 to determine the number of signature lines you require on the bottom of the pricing page of the proposal.

## Proposal Colors Tab

The screenshot shows the 'Proposal Heading Defaults' dialog box with the 'Proposal Colors' tab selected. The title bar reads '76 Proposal Heading Defaults'. Below the title bar, the subtitle is 'Default Values Of Text As It Will Appear On Printed Proposals'. There are two dropdown menus: 'Print Proposal Number On Proposals' set to 'Yes' and 'Print Page Numbers On Proposals' set to 'Yes'. The 'Proposal Colors' tab is active, showing a list of boxes and their corresponding text colors. The 'Company Name Color' is set to 'Black'. The other boxes are: 'Proposal Heading Box', 'Overview Section Box', 'Detail List Section Box', 'Recurring Charges Box', 'User Defined Section Box', 'Pricing Section Box', 'Payment Section Box', 'Withdraw Section Box', and 'Detail SubHeading Box'. Each box has a 'Text Color' dropdown menu. On the right side, there are 'OK' and 'Cancel' buttons.

Each heading and subheading box on the printed proposal may be printed in color. This tab screen gives the user complete control on the colors for each box area, as well as the text color for the text that appears in the box.



## Final Pricing Tab

This section overrides the final price page 'Job Pricing' section labels.

The screenshot shows the 'Proposal Heading Defaults' dialog box with the 'Final Pricing Page' tab selected. The dialog box has a title bar with a close button (X) and a subtitle 'Default Values Of Text As It Will Appear On Printed Proposals'. At the top, there are two dropdown menus: 'Print Proposal Number On Proposals' set to 'Yes' and 'Print Page Numbers On Proposals' set to 'Yes'. Below these are five tabs: 'Terms', 'Financial', 'Section Headings', 'Acceptance', 'Proposal Colors', and 'Final Pricing Page'. The 'Final Pricing Page' tab is active and contains several settings:

- 'Print Total Parts and Labor Line' set to 'Yes' with a corresponding text input field.
- 'Print Total Labor Line' set to 'Yes' with a corresponding text input field.
- 'Print Tax Line' set to 'Yes' with a corresponding text input field.
- 'Print Total Job Price Line' set to 'Yes' with a corresponding text input field.

Each text input field has a green prompt '(Leave Blank To Use Default)' below it. On the right side of the dialog box, there are two buttons: 'OK' with a green checkmark icon and 'Cancel' with a red X icon.

- Print total Parts / Labor** Select Yes to print this line with pricing.
- Total Parts Description** To change default text, enter your description line here.
- Print Total Labor Line** Select Yes to print total labor line with pricing.
- Total Labor Description** Leave blank for default, or enter your own description here.
- Print Tax Line** Select Yes to print sales tax line and sales tax amount.
- Tax Description** Leave blank for default, or enter your own description here.
- Print Total Job Price** Select Yes to print total job price line and job price.
- Total Price Description** Leave blank for default, or enter your own description here.

### Additional Setup Steps

In addition to properly setting up Pursuit with the Setup Wizard described above, if you will be using Pursuit to generate contracts for your terms and condition, we recommend setting up your Master Contract(s) in the Utilities/Master Contracts section. Details on the Master Contract section are described later in this documentation under the Utilities chapter.

## Chapter 2: Getting Started

### Menu Bar

The Menu task bar on the top of the Pursuit screen gives you access to every feature available within the system. The Menu bar is also used to exit Pursuit:



- |                           |   |
|---------------------------|---|
| <b>File</b>               | Drops down a menu containing the printer setup and EXIT commands.<br><i>Keyboard shortcut - ALT + F</i>   |
| <b>Edit</b>               | Copy and Paste fields to and from the Windows clipboard. Copy prospect name, address, phone number, account number, and contact name to the clipboard by selecting 'Copy Prospect To Clipboard' menu item.<br><i>Keyboard shortcut - ALT + E</i>        |
| <b>Reports</b>            | Lists all reports available in program.<br><i>Keyboard shortcut - ALT + R</i>   |
| <b>Inquiry/Mail Merge</b> | Create letters and postcards for mailing. Print Mail Merge area for selecting groups of prospects to receive letters or postcards. Also used as a prospect INQUIRY area for in-house reporting and telemarketing.<br><i>Keyboard shortcut - ALT + M</i> |
| <b>Utilities</b>          | Miscellaneous items such as Company Header (program setup options), user-definable field definitions, import/export utilities, and proposal heading defaults..<br><i>Keyboard shortcut - ALT + U</i>  |
| <b>Window</b>             | Select arrangement of open windows. Select active window from list of windows.<br>Select 'About Program' for current version information about program.<br><i>Keyboard shortcut - ALT + W</i>   |
| <b>Help</b>               | On-line help system.<br><i>Keyboard shortcut - ALT + H</i>  |

The following items are available on the taskbar:

**Prospects**   Accesses the Prospect Maintenance area (add/modify/delete prospect records)

**Proposals**   Accesses the Proposal Writing area

**Inventory**   Accesses the Inventory Maintenance area

**Calendar**    Accesses the Appointment Calendar (Monthly view of appointments which may also be printed from this section)

**Call Center**   Accesses the Call Log Entries.

Each of the above areas are covered in detail in their appropriate chapter in this documentation.

## How To Use Pursuit Edition 7

There are certain operational features that are found consistently through Pursuit (as well as common among all windows-based applications). If you are already familiar with windows, you should be well accustomed to these features as they follow the standards used by windows. Most screens throughout Pursuit will utilize some of these features:

### Exiting Out Of Pursuit

To exit out of Pursuit, select the **FILE** selection on the top menu of Pursuit, then choose **EXIT** found on the bottom of the File menu. This will close all active windows and ask if you wish to save any un-saved changes in those active windows.

You may also double-click on the upper left-hand box found on the window to exit Pursuit (this is a standard function found in windows-based programs). If you are using Windows 95, you may select the X found in the upper-right hand corner of the window to perform the same function.

### Moving From Field To Field

In windows-based applications such as Pursuit, the CUA-compliant method of entering information into a field is based upon using the **TAB** key to go from one field to the next, and the **SHIFT-TAB** key to go backwards from one field to the previous field. The ENTER key is used only to select the appropriate action button (OK, Cancel, Print, etc), NOT to go from field to field as is common with DOS programs.

The TAB key is used to sequence the cursor from one field to the next, as well as to highlight all tasks and buttons found on the screen.

### Keyboard Shortcuts

Although using a mouse is highly recommended in most windows-based program such as Pursuit, you can use the keyboard to navigate through the program. Almost all buttons throughout Pursuit have a 'hotkey' that can be pressed to perform that function (just as if you had clicked on the button with the mouse). Buttons that have hotkeys are identified with an underscore displayed directly under a letter on the button. Usually it is the first letter (for example: Print). By pressing the **ALT** key and the hotkey together, that button will be activated. In the example above, you would press **ALT + P** to select the Print button.

Note that some buttons will not have a hotkey - notably the Cancel button. This is a windows suggested specification so that cancellations are not done by mistake by pressing a hotkey. If you need to select one of these buttons and do not have a mouse, you may do so by pressing the **TAB** key until that button is highlighted, then press **Enter**.

## OK/Cancel Buttons

Clicking on the OK button (or highlighting the button with the tab key and pressing ENTER) will save the information entered. Clicking on the Cancel button will exit without saving.

## Insert/Change/Delete Buttons

Found mainly on lists of information (not on data-entry forms), clicking on one of these buttons will perform the appropriate action. Normally a data-entry screen will appear when the insert or change buttons are selected. Pressing the delete button will ask for confirmation of the delete. You may also change a record displayed on a list by double-clicking on that record or highlighting the record and pressing Enter.

## Lookup Buttons

These buttons can be found next to a number of fields throughout the program and are identified by a box with 3 periods inside [...]. They are selected by single-clicking on them with the mouse. The purpose of the lookup button is to list the valid entries for that field. You may add your own entries to these lists by pressing the **INSERT** button found on the validation list, as well as modify or delete entries on the list by pressing the **CHANGE** or **DELETE** buttons - also found on the validation list. Pressing the **SELECT** button from the validation list or simply highlighting the correct response and pressing the ENTER key will place that value in the appropriate field. This provides you with a very accurate means to control the data that goes into these fields.

## Scroll Bars

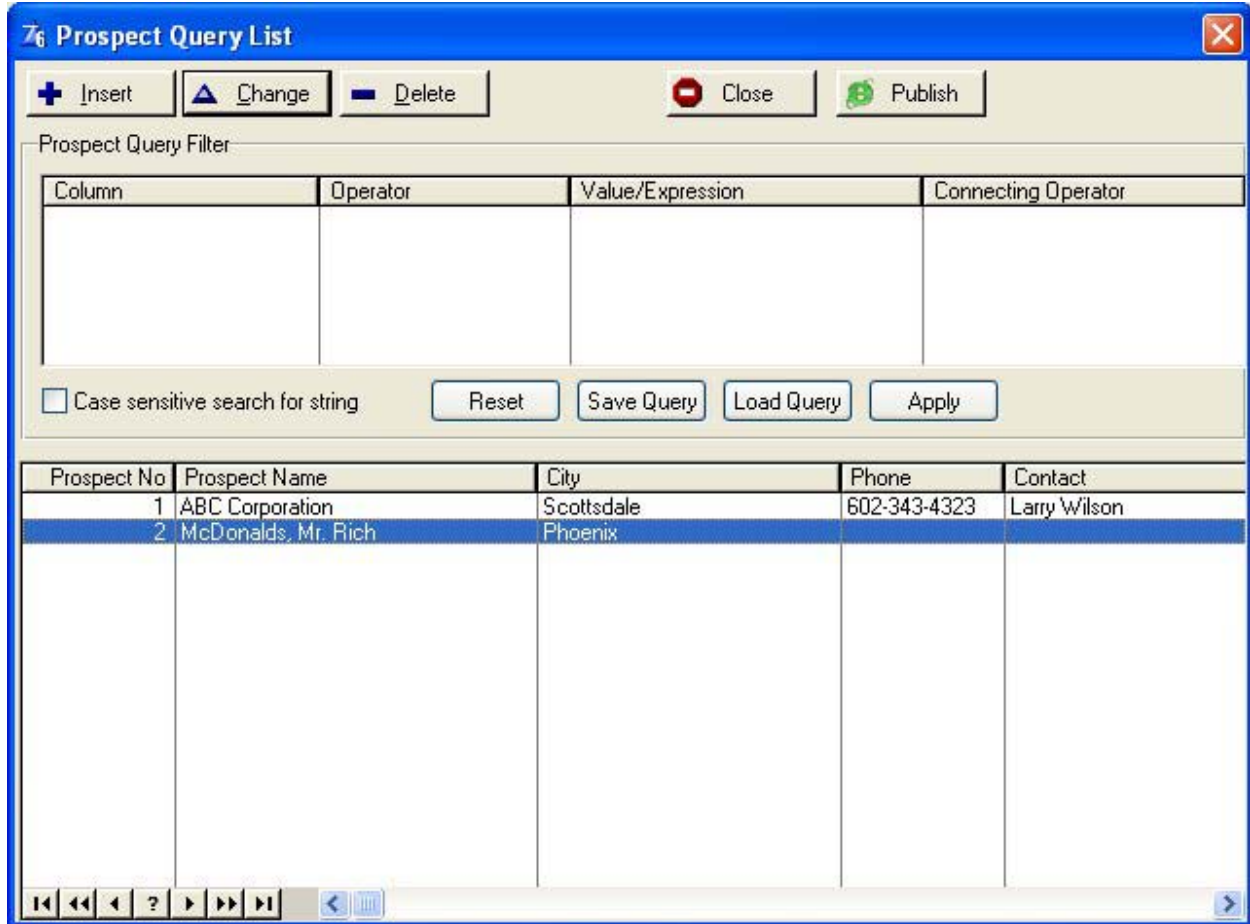
Moving the cursor to the up-arrow or down-arrow on the right-hand scroll bar will scroll the list in the appropriate direction. Lists that have a horizontal scroll bar on the bottom will also scroll left or right when their arrow keys are pressed. Clicking the mouse on the scroll square button and sliding it along the scroll bar will readjust the position of the list once the mouse button is released. This is especially evident with the horizontal scroll bar, however the vertical scroll bar is better adjusted by clicking on the up or down arrow keys found in the scroll bar region.

Lists with horizontal bars represents that additional information is available for viewing to the right of the current columns displayed. Pressing on the right arrow key of the horizontal scroll list will display this information.

VCR Buttons are also displayed on lists. You may use the VCR buttons to scroll up or down through the listed items by clicking on the appropriate arrow (scroll arrows support one line scroll, page scroll, or Top-Of-List and Bottom-Of-List).

## Search By Query Button

On the Prospect, Proposal, Inventory, and Call Center lists there is a QUERY button. The Query button provides very powerful search capabilities so that you may find a list of records that match your specific search criteria based on any field displayed:



The screenshot shows a window titled "Prospect Query List" with a toolbar containing "Insert", "Change", "Delete", "Close", and "Publish" buttons. Below the toolbar is a "Prospect Query Filter" section with a table for defining search criteria. The table has four columns: "Column", "Operator", "Value/Expression", and "Connecting Operator". Below this table is a checkbox for "Case sensitive search for string" and buttons for "Reset", "Save Query", "Load Query", and "Apply". At the bottom is a data table with five columns: "Prospect No", "Prospect Name", "City", "Phone", and "Contact". The data table contains two rows of data.

Column	Operator	Value/Expression	Connecting Operator

Case sensitive search for string               

Prospect No	Prospect Name	City	Phone	Contact
1	ABC Corporation	Scottsdale	602-343-4323	Larry Wilson
2	McDonalds, Mr. Rich	Phoenix		

To use the Query feature, select the following columns in order (tab from column to column)

**Column**                      Click on the first blank line under the Column header and a list of fields available for searching are displayed.

**Operator**                      A list of operators will appear when you click on the drop-down menu. Choices include various Boolean operators such as: Equal/Contains/Less Than/Not Equal/Begins With, etc.

**Value/Expression**            Value to compare with

**Connecting Operator**        If you need to query against multiple conditions, select one of the appropriate Operators (AND, NAND, OR, NOR, etc.) or select DONE if you are finished with the search criteria.

**RESET Button**                Clears the query filter you have entered

<b>Save Query Button</b>	Saves the query filter you have entered for future reference
<b>Load Query Button</b>	Loads a previously saved query filter you had created
<b>Apply Button</b>	Starts the search of records based upon entered query filters. The selected records will appear in the list window below the Query. You may then use the standard Insert/Change/Delete buttons on the top of the Query list to work with those displayed records.
<b>Publish Button</b>	Prints selected record list as an HTML formatted page

## **Resizing Columns In Lists**

Some lists of information (inventory, proposals, prospects, call log, etc) have resizable columns. This allows you to widen or narrow the width of a column so that other columns may appear that would normally be out of range of the displayable list (to the right). Resizable columns are usually found on lists that also have a horizontal scroll bar found on the bottom of the list.

To resize a column, move the cursor to the line immediately to the right of the column to be resized, click on the mouse button and move the cursor to change the width.

You may also resize the entire list screen by moving the cursor to the outer right or lower edges of the list screen and hold down the left mouse button. Then drag the window to the appropriate size. This is especially beneficial if you have a higher screen resolution and wish to take advantage of available screen space.

## **Reorder Columns In Lists**

Columns on the Prospect, Proposal, Inventory and Call Log list may also be re-arranged to your preference. To re-arrange the order of columns (selectable individually for each sort tab displayed), right-click in the list section and select LIST FORMATS and then click on FORMAT SETUP. Listed will be an identifier for each sort tab supported on that list. Highlight the appropriate sort order for which you wish to reorder the columns and then click on CHANGE.

You may now put a checkmark next to those columns you wish to display in this sort view, or clear the checkmark for those columns you wish to omit in this sort view. You can also highlight a listed column and click on the left (up) or right (down) arrows to rearrange the order of the columns as they will be displayed in this sort view. When completed, click on SAVE and then Apply and close out the screen.

You may repeat the above procedure for each sort view if you desire, with each sort view having it's own column order.

## Sort Tabs

Sort tabs are found on several lists throughout Pursuit and provide great flexibility in looking up information in that list. A sort tab can be found on the top region of these lists, with a description of the sort sequence described on the tab. By pressing one of these tabs with the mouse, the sort sequence of that list will immediately change. In addition, some of these lists also have a 'Search' field which automatically changes value based upon the sort tab selected. For example, if you are displaying an Inventory List by Part ID, the search field will allow you to search the inventory list by part id. If you then select the sort tab to display the inventory list by Vendor Name, the search field will now allow you to search the inventory list for a specific vendor (actually the list will then display starting with that vendor). You will see that the sort tabs are invaluable in being able to look up information quickly and easily.

## Clipboard Copy & Paste

Any field of information in the Pursuit system can be copied to the clipboard. This allows you to take any information and copy it to any other part of Pursuit or to any other Windows-based application. Simply move the cursor to the beginning of the field to be copied, then hold down the left mouse button while moving the cursor to the end of that field. This will highlight the contents of that field. Then select **EDIT** and then **COPY** from the top menu. The contents of the field are now stored in the Windows clipboard. To paste this information into another field, move the cursor to the location where the information is to be pasted (copied to), then select **EDIT** and then **PASTE**.

Pursuit Edition 7 also contains a feature in the **EDIT** menu called '**Copy Prospect To Clipboard**'. This is a very useful feature that will allow you to copy a prospect's name, address, phone number, and contact name directly to the clipboard without having to copy each field individually. You may then go into any application (for example a word processor) and paste the clipboard into that application. This is perfect for word processing mail-merge situations where you want to place a prospect's name and address into a document or envelope for addressing. Once you have pasted the clipboard to the appropriate document, you may simply remove the phone number if you do not require it for the document.

## Active Window Selection

Since Pursuit uses multi-threading techniques to allow several areas of the program to be opened at one time, you can easily select which window to bring to the front by choosing the **Window** menu in Pursuit, then selecting among the list of active windows. You will notice that prospect and proposal listed on this menu will display the name of the prospect associated with that window. This makes it easier to identify who each window belongs to.

It is generally a good idea not to keep too many screens open at one time since it does use windows resources (which are limited by Windows). If you find you have too many screens open and wish to close all of them, it is best just to exit out of the Pursuit program by choosing **FILE** and then **EXIT**. This will then close all of the active windows (and it will ask you if you wish to save changes if any were made within those windows), then exit you out of Pursuit.



## Repositioning Screens

You can move any screen displayed (assuming there is room to move it around) by clicking on the top frame of that window and move the screen while holding down the left mouse button. Release button when screen is in new position. Screen position will remain in that position until moved again.

## RTF Format Controls

Several free-form text areas that print on proposals support the RTF (Rich Text Format) protocol. The RTF format allows you to control the typeface, size, color, and various other attributes of the text to be printed. RTF formatting is supported in the Overview, Closing, Text Item (on proposal item list), Inventory Detailed Description (per item), Phrases, and Terms/Conditions sections. Leaving your cursor above one of the following buttons for a second will display the tooltip representing the purpose of that button.

The following toolbar controls the RTF features of each of the above sections:



In clockwise order starting at the upper-left corner:

- |                      |  |
|----------------------|--|
| <b>Open</b>          | You may import an RTF formatted document directly into the text area. This includes RTF documents that you can import from Microsoft Word (saved as an RTF document) or any other word processor that supports the RTF format. |
| <b>Find</b>          | The binocular icon allows you to FIND a specific text string in the document   |
| <b>Replace</b>       | Perform a Find and Replace operation on specific text entered.   |
| <b>Cut</b>           | Cut highlighted text out of the text area  |
| <b>Paste</b>         | Paste text contained in the windows clipboard to the text area at cursor   |
| <b>Copy</b>          | Copy highlighted text to the windows clipboard   |
| <b>Tab</b>           | Set Tab stops  |
| <b>Indent</b>        | Set Paragraph Indents  |
| <b>Justification</b> | Set Left/Center/Right/Full Justification on highlighted text with these buttons.   |

<b>Bullets</b>	Turn on Bullet Option (Inserts Bullets to the left of each line)
<b>Bullet Style</b>	Selects the type of bullet to use (ie: bullet, numbers, roman, letters)
<b>ABC (Spell Check)</b>	<p>Clicking on the ABC button while having the cursor placed in the Text area of the screen will spell check the entire text within that field. If any spelling errors are found, a dictionary with assumed related spellings will be listed. You may then click on Ignore to ignore changing the spelling, or click on one of the correct spellings of that work and then select Change to accept the new spelling.</p> <p><b>NOTE:</b> Pursuit's spell checker uses the popular Microsoft Word spell checker. Therefore, you must have Microsoft Word installed on any workstation that you wish to use the Spell Check feature of Pursuit.</p>
<b>Typeface</b>	Select the Typeface to use (supports list of fonts installed on your computer)
<b>Point Size</b>	Select the appropriate point size for text
<b>Char Set</b>	Select the character set supported by your installed fonts
<b>Attributes</b>	Select From Bold, Italic, Underline Attributes for highlighted text
<b>Text Color</b>	Select color for highlighted text
<b>Fill Color</b>	Select color for background of highlighted text

## Chapter 3: Prospect Management

The Prospect Management function of PURSUIT contains general information pertaining to your prospects. Information such as first and last name, address, telephone number, source of sales lead, salesrep assigned to account, directions, plus up to 16 user-definable fields can be entered at this point. A prospect must exist on file before any proposals can be written. However, any follow-up information relating to that customer can be entered at a future time and has no impact on the creation of proposals.

Prospect Name	Contact	Telephone	Sales Rep	Address
ABC Corporation	Larry Wilson	602-343-4323	JRW	150 Main Stre

## Selecting A Prospect

Once you have selected the Prospect button from the top task bar, a screen will appear listing all prospects that are currently in the PURSUIT Database System. These prospects will appear in alphabetical order, and only 15 or so prospects will appear at a time. If there are more than 15 prospects on file, you may scroll the table up or down until you find the prospect you are looking for. Once you have highlighted the appropriate prospect, press the ENTER key to retrieve that prospects' profile or select the Change button. You may use the scroll bar to scroll the list up or down, or press the CTRL-PGUP or CTRL-PGDN keys to go to the top or bottom of the list.

**NOTE:** *You may resize the entire Prospect List by dragging the right or lower edge of the proposal list. If you have a higher screen resolution, resizing the list will display more columns and records. You may also resize columns contained within the list by moving the cursor over the vertical line next to a column and drag the line to narrow or widen the column displayed. Finally, you can reorder the arrangement of columns by right-clicking on the list and selecting LIST FORMAT and then FORMAT SETUP (see previous chapter for detailed instructions on rearranging columns).*

In addition to selecting a prospect by using the above keys, you may quickly select a prospect by typing the prospects' full or partial name above the list. As you type each letter, the first prospect to match the combination of letters entered will be highlighted. Keep entering each letter of the prospect name until the correct prospect is selected. Press the ENTER key to retrieve that prospects' profile. You may also locate a prospect by telephone number or street address (full or partial address) by clicking on the appropriate button on top of this list and entering the phone number or address when prompted.

If you wish to ADD a new prospect to the file, press the INS key. A Prospect Management data entry screen will be displayed. After you have finished entering the data for that prospect, click on the OK button to save that prospect and return back to the Prospect List. If you do not wish to save the information you have just entered, click on the CANCEL button to abort the save and return you back to the Prospect List. If you wish to DELETE a prospect on the list, highlight the appropriate prospect and click on the DELETE button. You will be asked to verify the delete.

Security Administration attributes for the user logged into Pursuit will affect their ability to Add or Modify a prospect. In addition, if you are utilizing the Unique Salesrep ID feature of Pursuit (Utilities/Security Administration/Advanced Tab) then only prospects entered and/or assigned by the Salesrep ID of the person logged into Pursuit can be viewed by that person.

### Export To XML Button

To export your prospect list to an XML file (which is a common file format recognized by many programs such as Microsoft Excel), click on the Export To XML button. No prompts will be displayed. A file named 'PROSPECT.XML' will be created in your Pursuit folder. You may now open this file in Microsoft Excel for a spreadsheet listing of all of your prospects.

## Add A Prospect Profile

In order to add a new prospect to the system, press the INS key from the Prospect List screen. A prospect management data entry screen will be displayed with the cursor placed on the Prospect name field.

**Prospect Maintenance - ABC Corporation**

OK Cancel Call Log Proposals Print Map Directions

Prospect Information Additional Contacts Custom Fields NotePad Documents Additional Sites

Account 1 Entered 8/04/03

Prospect ABC Corporation

First Name (Residential Only)

Street Line 1 150 Main Street

Street Line 2

City Scottsdale

State/Zip AZ 85020

TaxCode Scottsdale

Cross St. Central Avenue & Camelback

**Demographics**

Status Prospect

Property Res

Sales Lead Referral

Industry Services

Sales Rep JRW

Last Mailing

Purchased

**Main Contact Information**

Contact Larry Wilson

Title President

Dear Mr. Wilson

E-Mail Addr lw@abccorp.com Email

Website URL www.z-microtech.com View

Inactive Prospect

**Record will be Changed**

The prospect maintenance screen consists of 6 tab controls found on the top of the screen:

These tabs are selected by simply clicking on the appropriate tab. To save the prospect maintenance screen, click on the OK button. The tab controls are described in detail later in this chapter.

In addition to these tabs, you will also have a setup of buttons located on the top of the screen for the following functions:

### Call Log Button

Pressing this button brings up the call notes (follow-up history log) for this prospect. Pursuit has the capacity to handle an unlimited number of call notes per prospect, and follow-up reminders may be scheduled automatically onto the appointment calendar from within

this section. Call Notes section is described later in this chapter.

**Proposal Button**

Pressing the proposals button brings up a list of proposals that are on file for this prospect only. You may select an existing proposal to view/modify, or select the INSERT or DELETE buttons to add or delete a proposal from this list. The Proposal section is described in a later chapter.

**Print Button**

If you wish to print a 'snapshot' of this prospect, click on the Print button. A one page printout of information pertaining to just this prospect will be printed.

**Map Button**

Clicking on this button automatically launches your web browser and displays a map of this prospects' location within Google Maps.

**Directions Button**

Clicking on this button automatically launches your web browser and displays a map and driving directions to this prospects' location within Google Maps. The default 'source' location for directions can be selected in the System Defaults (Prospect tab) area of Pursuit to be either your company office address (Company Header address), or the address of the salesrep assigned to this prospect. You may also override the source location in Google Maps by simply typing over your source address.

**Prospect Information Tab**

This tab is the main prospect screen and contains prospect name and address information, along with various demographic data and main contact information.

**Prospect**

Enter the Prospect's last name (If a company, enter the name of the company here instead).

**First Name**

Enter the Prospect's first name (If a company, leave this field blank).

**Address 1**

Enter the first line street address for this prospect.

**Address 2**

Enter the second line street address, if any. This line would contain any additional information that is required by the Post Office (second floor, Suite 1500, etc.) (35 characters maximum)

**City**

Enter the prospect's city (25 characters maximum)

**State**

Enter the prospect's State code (NY, CA, etc.)

<b>Zip</b>	Enter the prospect's zip code (9 digit code allowed). (10 characters maximum including dash)
<b>County</b>	Enter the county that the prospect resides in. The county field is used to determine what tax rate to use for sales tax calculations. If the county is entered incorrectly, a validation table containing a list of valid counties will appear in a pop-up window. Select the correct response or press INS to add a new county to the validation list. (maximum 10 characters)
<b>Cross Street</b>	Enter the nearest cross street to the prospects location.
<b>Contact</b>	Enter the name of the main contact at this prospect location.
<b>Title</b>	Enter the title of the above contact (optional).
<b>Dear</b>	Enter the salutation that should be used when sending a letter to this prospect. The name entered in this field will appear after the 'Dear' section of the mail merge letter in the Mail Merge section of PURSUIT.
<b>E-Mail Address</b>	Enter the e-mail address of this contact, if applicable.
<b>Email Button</b>	Click on this button to launch your default email program and automatically fill-in the above email address in the TO section of the email.
<b>Website URL</b>	Enter the URL of this prospect's website
<b>Website Button</b>	Click on this button to launch your default internet browser and automatically display the website URL defined above.
<b>Telephone</b>	Enter the prospects main phone number, including extension if needed.
<b>Alt Phone</b>	Enter an alternate phone number for this contact, including extension.
<b>Fax</b>	If the prospect has a fax machine, enter the fax number in this field.
<b>Cellular</b>	Enter the cellular phone number for this contact.
<b>Status</b>	Select from the drop-down list the status of this prospect (Prospect, Customer, Other). You may add your own Status codes to the validated list by clicking on the [...] lookup button and inserting your own statuses.

<b>Property</b>	Identify this prospect as a RESidential, COMMercial or OTHer account.
<b>Sales Lead</b>	Enter the source of lead for this prospect. This field is validated and therefore must be a valid lead source. Examples of lead sources include yellow pages, direct mail, referrals, advertising, cold calls, etc. If the source you wish to use is not on the validation table, press INS to add.
<b>Industry</b>	For demographic purposes. Enter the industry (for commercial accounts), or occupation (for residential accounts). This field is validated and must be equal to a valid industry name. If the industry you wish to use is not on the industry validation table, then press INS to add it.
<b>Sales Rep</b>	If this prospect is assigned to a sales rep, enter the name of the sales rep in this field. The name must match a list of salesreps entered in the salesrep validation table. If the sales rep name is not on the validation table, then press INS to add it.
<b>Last Mailing</b>	Shows the date of the last letter or postcard mailed to this prospect using the mail merge section.
<b>Purchased</b>	If a prospect purchases a system from you, then enter the date of purchase in this field. This will also allow you to transfer this customers prospect information into the billing program (see System Utilities for further information on integration with ALARM or SERVICE EXPRESS).
<b>Inactive Prospect</b>	This checkbox indicates if this prospect is considered inactive. Place a checkmark in this box for inactive prospects. Inactive prospects can be hidden from being displayed on the Prospect List (selected in System Defaults/Prospect tab) or highlighted in red if displayed.



## Additional Contacts Tab

Contact Name	Main Phone	Alt Phone	Fax	Title	Cellular
Sue Johanssen	480-555-4343			CFO	

## Additional Contacts Tab

This tab contains a list of additional contacts associated with this prospect. Phone numbers, e-mail address, and comments may be entered for each additional contact. This tab has the ability to handle an unlimited number of contacts.

## Adding Additional Contacts Tab

Additional Contact Profile

Record Will Be Added

Contact Name: John Smith

Main Phone: 516-777-7777 Extension: 116

Alt Phone: 516-555-5555 Extension: 120

Fax: 516-444-4444

Cellular: 516-222-2222

Title: C.E.O.

E-Mail Address: ceo@yourcompany.com [Email]

Comments:

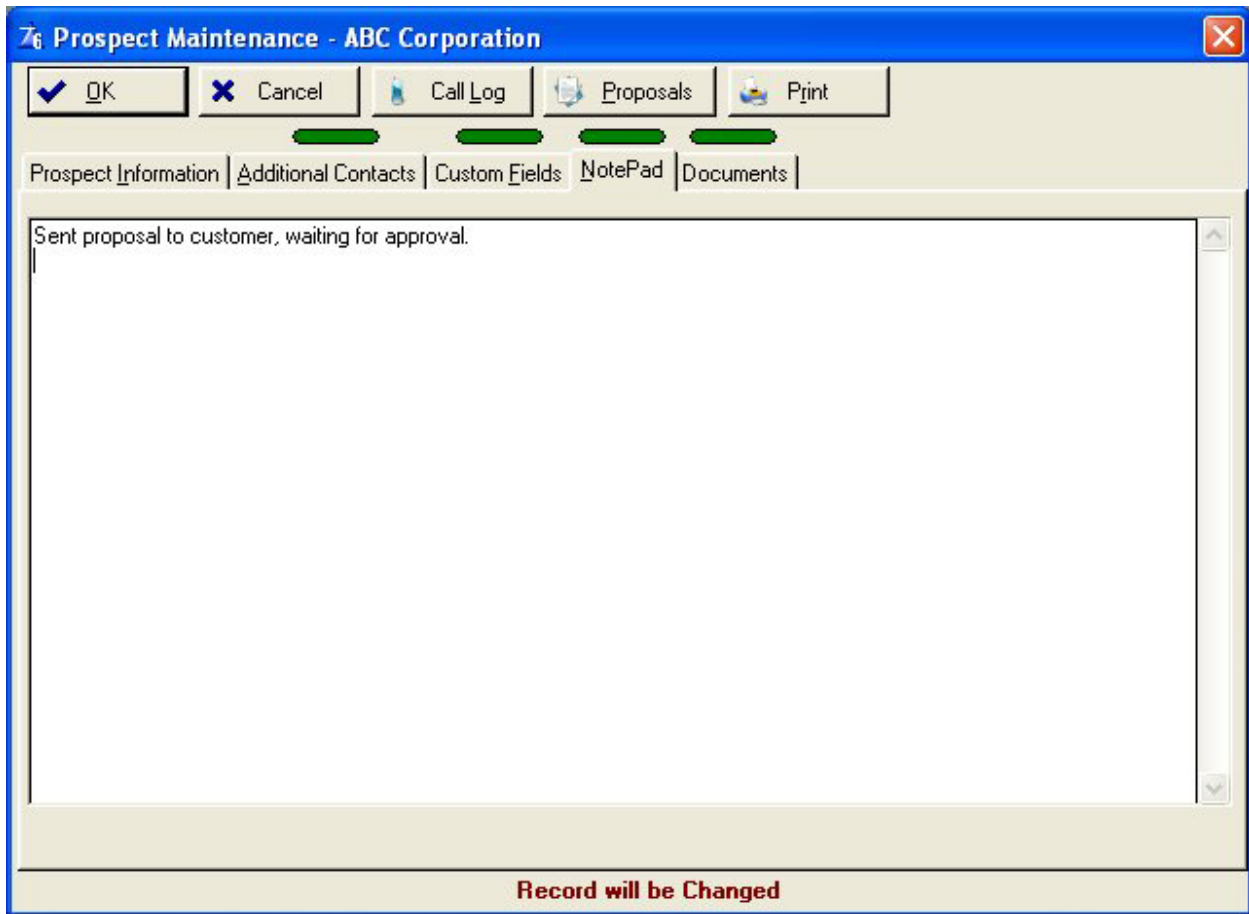
Notes

OK Cancel

After selecting the Additional Contacts Tab, a list of existing additional contacts will be displayed. You may select an existing contact, or select the INSERT button to add a new contact to the list, or select the DELETE button to delete an existing contact. The additional contact profile screen consists of the following fields:

- |                       |   |
|-----------------------|---|
| <b>Contact Name</b>   | The full name of this contact.  |
| <b>Main Phone</b>     | Enter the phone number (and extension if applicable) for this contact.  |
| <b>Alt Phone</b>      | Enter an alternate phone number and extension for this contact.   |
| <b>Fax</b>            | Enter the fax number for this contact.  |
| <b>Cellular</b>       | Enter this contacts cellular phone number   |
| <b>Title</b>          | If this is a company prospect, enter the contact's title.   |
| <b>E-Mail Address</b> | If this contact has an e-mail address, enter the address in this field.   |
| <b>Email Button</b>   | Click on the Email button to launch your default email program and automatically fill-in the above email address in the TO section. |
| <b>Comments</b>       | Enter a comment or any special information about the contact.   |
| <b>Notes</b>          | This text box allows you to enter notes pertaining to this contact.   |

## Notepad Tab

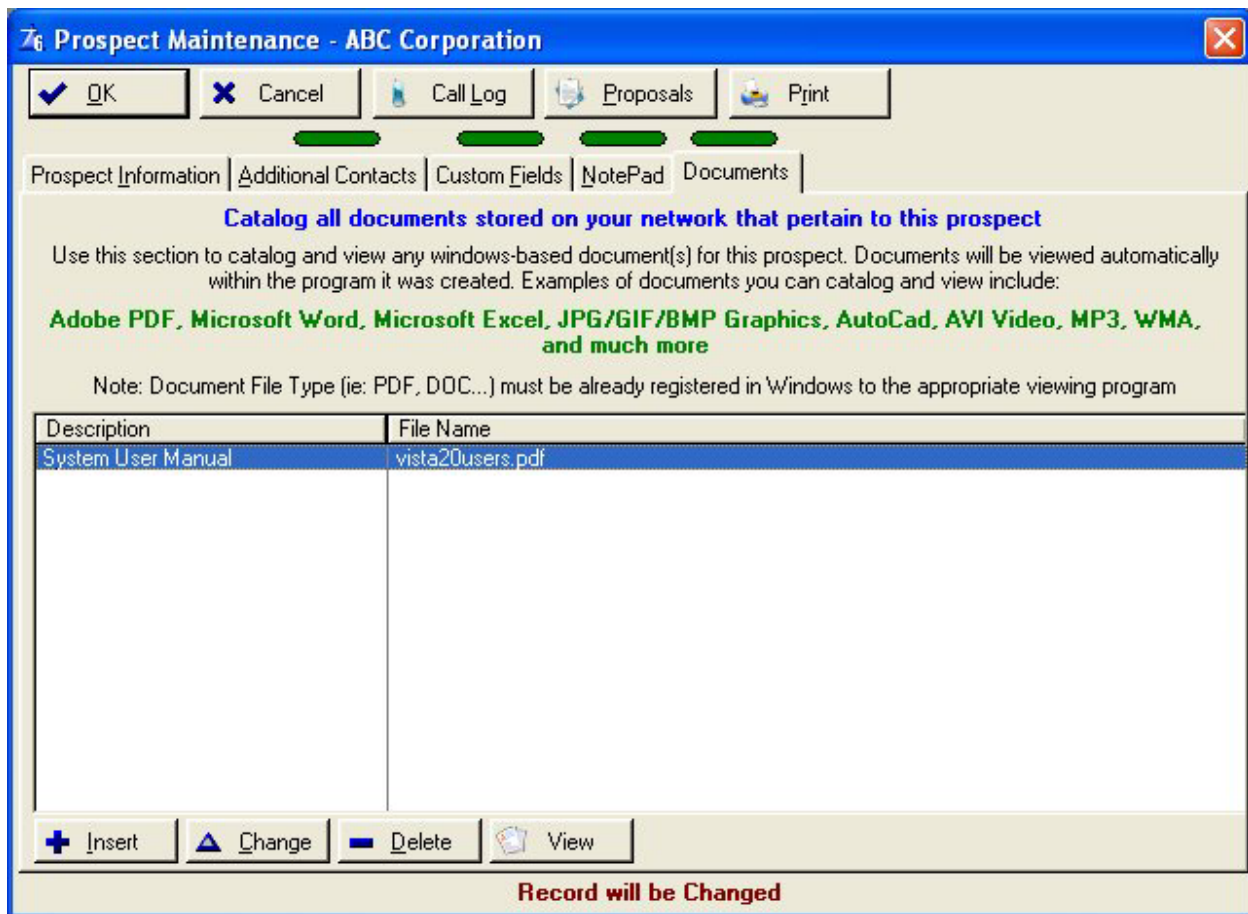


## Notepad Tab

The notes tab contains a large text area of comments or notes you wish to store for a prospect.

You may enter notes about each prospect within this tab section. The text box scrolls up and down by clicking on the vertical scroll bar. Notes may also be printed in the Prospect List Report (Report Facility), but will not print on proposals as they are for internal departmental use only.

## Document Tab



The Document List is a powerful organization tool within Pursuit Edition 7. You may catalog all documents that pertain to this prospect, no matter what type of documents they are or where they are stored in your network. As long as the document (any file) is registered with a related application on your computer, you may list that file in the Document List.

When you click on the VIEW button, Pursuit Edition 7 will automatically launch the application that document (file) is associated with, along with that file itself. For example, if you have a Microsoft Word document called 'contract0023.doc' on your server drive G:, you may list that document here (you may have an unlimited number of documents listed in this section – per prospect!). When you highlight that Word document and click on the VIEW button, Pursuit will launch Microsoft Word on your computer (assuming it is installed on your computer) and place the 'contract0023.doc' document within Word ready for use.

This document list may be used to track all types of prospect documents, including:

- Contracts
- Floor Plans
- Wiring Diagrams
- Letters
- Photos
- AutoCad or other architectural Drawings
- Any other file created by a windows-based program and residing on computer

## Custom Fields Tab

The screenshot shows a software window titled "Prospect Maintenance - ABC Corporation". At the top, there is a menu bar with buttons for "OK", "Cancel", "Call Log", "Proposals", and "Print". Below the menu bar are several tabs: "Prospect Information", "Additional Contacts", "Custom Fields" (which is the active tab), "NotePad", and "Documents". The main content area is divided into three sections. On the left, there are eight text input fields labeled "Bldg Sq Footage" (containing "15,000"), "User Field 2", "User Field 3", "User Field 4", "User Field 5", "User Field 6", "User Field 7", and "User Field 8". In the middle-right section, there are four date fields labeled "User Field 9", "User Field 10", "User Field 11", and "User Field 12", each with a calendar icon to its right. Below these is a section titled "Validated Fields" containing three fields: "House Style" with a dropdown arrow, "User Field 14", "User Field 15", and "User Field 16", each with a dropdown arrow. To the right of the date fields is a button labeled "Setup Fields". At the bottom of the window, a status bar displays the text "Record will be Changed".

Pursuit was designed with up to 16 user-definable fields that may be defined by you within the prospect maintenance area. These fields may be setup for any special information you need to keep track of. All of the user-definable fields may be used as a selection field within the Mail Merge area, which offers you great flexibility in inquiring against your prospect database (see the Mail Merge chapter for further information on this capability).

The custom fields tab has the following fields available for your use: You may define these 16 fields by selecting the **Setup Fields** button available on this screen. Any field definitions you enter in the Setup Fields area will now be displayed within the Custom Fields tab screen. The user-definable fields are divided into 3 separate categories, as follows:

### Custom Fields 1 thru 8

These 8 user-definable fields on the left hand section of the screen may be used to enter any type of information you wish. You may enter up to 20 characters of text/numbers into each field.

### Custom Fields 9 thru 12

These 4 user-definable fields on the upper right hand section of the screen are preformatted as date fields.

Use these fields if you need to enter any type of date information for a prospect. These fields are also searchable by date range within the Mail Merge section.

### **Custom Fields 13 thru 16**

These 4 user-definable fields on the lower right hand section of the screen are validated fields. Each of these 4 fields has a lookup button to the right. Selecting the lookup button for one of these fields will pop-up a validation list which you may use to enter information which should only be entered into this custom field. For example, custom field #13 has a field definition called 'House Style', and the validated list that appears when you press the lookup button for this field would contain the various types of house styles you want to allow (Ranch, Split, Colonial, Victorian, etc.). This ensures that data entered into this field is consistent.

## Additional Sites Tab

Site ID	Site Name	Site Street Address	Site Str
1	ABC Corporation Warehouse Location	2920 Commercial Avenue	Suite 203
2	ABC Corporation Plant 1	3902 Industrial Rd	

Each prospect can have an unlimited number of site addresses associated with it. This allows for easy selection of site information for each proposal being created for a prospect. It also helps maintain consistency with proposals created for one account that has many sites, since you can easily identify all proposals, regardless of site address, by bringing up the prospect account.

Click on Insert to add a new site to this prospect or click on Change to modify an existing site. Clicking on delete will delete a site from the prospects' record.

Record Will Be Changed

Site ID: 1  
Site Name: ABC Corporation Warehouse Location  
Site Address: 2920 Commercial Avenue  
Site Address 2: Suite 203  
Site Town: Phoenix State: AZ Zip: 85002  
County Code: Phoenix  
Main Contact: Tim Jackson  
Telephone: 602-999-9999  
E-Mail Addr: tjackson@abccorporation1.com

**Site ID** Automatically numbered ID to uniquely identify this site record for this prospect.

**Site Name** Name of this site. If you use the same name as the main prospects' name, keep in mind you may not be able to easily identify one site from the next. It is usually recommended that some identifier be placed within the site name to easily distinguish from the main site and other sites.

**Site Address** Enter the street address, address line 2 if required, town, state and zip code of the site location.

**County Code** Enter the tax code associated with this site. This is the tax code that will be used on the proposal for any taxable items (unless overridden with another tax code on the proposal).

**Contact** Enter the name of the primary person that is your contact at that site.

**Telephone** Enter the primary telephone number at that site.

**Email** Enter an email address of a contact at that site. This will be the default email address where the proposal will be emailed to, however you can always override this default on the proposal. Clicking on the Email button will launch your default email client on that workstation and automatically address the email with this email address.

Click on OK to save this record, otherwise click on Cancel to abort.



## Call Log Button

Call Date	Call Type	Person Contacted	Expense	Call Back On	Reason For Call
8/01/03	Talked	Larry	0.00		Finalize Signing Of Contract

This section allows you to keep detailed records of conversations for all follow-up visits you have with each prospect. By utilizing this section, PURSUIT will remind you of pending follow-ups in the appointment calendar section or the Callback date sort tab. You also will have a record showing details of previous conversations which can become quite helpful during a sale. You can enter an unlimited number of follow-up records for each prospect.

Each follow-up keeps track of information such as contact date, person, phone number, type of contact, etc. To add, review or delete your call notes, click on the Call Notes button found on the main prospect information screen. This will bring up a window displaying a list of call notes for this prospect. You may add additional call notes to this list by selecting the INSERT button, or you may delete a call note by selecting the DELETE button.

## Call Profile

The screenshot shows a software window titled "Call Profile" with a blue header and a close button in the top right. The window contains several input fields and a text area. At the top, it says "Record will be Added". The fields are arranged in a grid-like fashion. The "Call Date" field contains "8/15/03", "Time Of Call" contains "07:47:16", and "Length Of Call" contains "00:00:19". There is a clock icon next to the "Length Of Call" field. The "Type Of Call" field is empty with a dropdown arrow, and "Sales Rep" contains "JRW" with a dropdown arrow. Below these are "Prospect Name" (ABC Corporation), "Account" (1), "Person Contacted" (Larry Wilson), "Reason For Call" (empty), "Telephone" (602-343-4323), and "Expense Of Call" (0.00). To the right of the "Account" field is a "Schedule Follow Up (Optional)" section with "Call Back Date" (empty), "Call Back In" (0 Days), and "Call Back Reason" (empty). At the bottom is a large "Comments" text area and "OK" and "Cancel" buttons.

The Call Profile screen consists of the following information:

- Date Of Call** Date call took place. This field will automatically default to the system date, or you may enter a different date, then press Tab to continue.
- Type Of Call** Each call note should be identified by what type of call it is, such as cold call, visit, estimate, lunch, phone call, contract, install, inspection, etc. You can also use this field to identify the result of the call (left msg, busy, fax, email, etc.). Several reports use this field to give statistics on various sales rep and follow-up strategies. This field is validated against a table of call types. A validation list will automatically pop-up when you go into this field. Select one of the call types or select INSERT to add your own valid call type.
- Sales Rep** Enter the name of the sales rep who initiated this call. The sales rep is validated against the Sales Rep table. Select a valid sales rep from the lookup list, or add a salesrep to the list by selecting INSERT on the list.
- Person Contacted** Name of person contacted during this call. PURSUIT will automatically default this field to the main contact name on the prospect management screen, or you may enter a different name if appropriate.

<b>Telephone</b>	Telephone number called. PURSUIT will default this field to the main telephone number on the prospect management screen. You may change the phone number or press enter to accept the default number.
<b>Reason For Call</b>	A brief description of the reason for the call (or visit) such as review contract, make appointment, etc. This field is not validated.
<b>Expense For Call</b>	If you would like to keep track of the expenses of prospecting this field can be very valuable. Enter the expense associated with this particular call. If it is a phone call, you can enter the approximate cost of the call (plus your time spent). If it is an actual visit, you can also include the cost for travel, time and any additional costs such as lunch. The Time and Expense report as well as the sales rep performance report will use this field.
<b>Length Of Call</b>	The amount of time in hours and minutes for this call. As in the expense field described above, the length field is used on the time and expense report and can help give you a handle on how much time is spent on prospecting. If you have several sales reps, it will also show you the efficiency of their sales efforts on the sales rep performance report. The format for the length field is HH:MM where HH is hours and MM is minutes. To enter just minutes, press the : first, and then the number of minutes.
<b>Call Back Date</b>	The call back date field and the call back in field are very useful features of Pursuit and should be utilized wherever possible. Performing follow-ups is one of the most important selling techniques that is often overlooked because a company forgot to follow-up on a sales call. If a number of days is entered in the 'Call Back In' field described below, then PURSUIT will calculate the call back date. If the 'Call Back In' field is left blank, then you may enter your own Call Back Date in this field. An appointment for this call back date will automatically be posted to the appointment calendar for you.
<b>Call Back In</b>	If you entered a Call Back Date in the above field, the number of days until the next follow-up will be calculated for you by Pursuit and entered into this field. If you enter a number of days in this field and left the Call Back Date field blank, then the Call Back Date will be calculated for you by Pursuit.
<b>Call Back Reason</b>	Enter the purpose for the next follow-up. This description will appear on the appointment calendar. There is no validation on this field.
<b>Comments</b>	The comment section may be used to describe any additional details about this call.

## Chapter 4: Proposal Writer

A major feature of PURSUIT is its ability to create professional proposals that can contain multiple pages of free-form descriptions, plus a detailed proposed equipment list along with prices and locations of installation (optional). The proposals can be printed on blank paper using laser, dot matrix or Inkjet printers, and can also print in color on a color Inkjet printer.

Entering a proposal consists of several steps. The first step consists of entering general information about the proposal, such as prospect, billing and installation addresses, start and completion dates, type of building and accessibility, and job cost information (price overrides, payment schedules, etc.). All prospect information will be carried over automatically from the prospect management screen once you have identified the name of the prospect. If the prospect is not on file, you may enter the prospect into the system directly from the proposal screen, eliminating the need to exit out of the proposal screen to go into the prospect management screen.

The second step is to enter the free-form text that you want to have print on the proposal. This is accomplished by selecting the **Proposal Text** tab on the top of the proposal screen. To help aid in typing, a 'phrase list' has been incorporated into this section. A phrase list is a depository of your commonly used descriptions and phrases that you normally print on proposals. Once you have set the phrase list up, it is always available at the touch of a key to insert your common descriptions into a proposal. This can save you invaluable time, especially if you are not a touch typist.

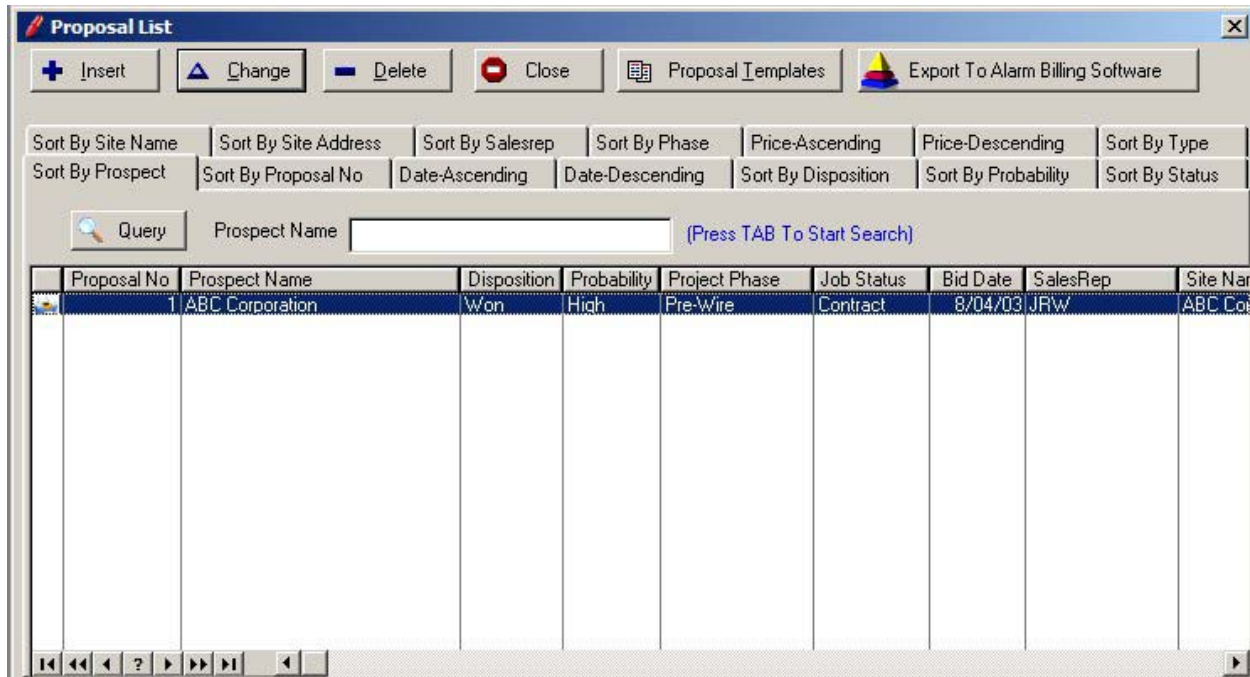
The third step is to identify the labor hours and equipment that will be used. If you do not normally print out a detailed proposed equipment list with your proposal then you may leave this section alone. However, keep in mind that the job cost report is dependent on this information to be entered so that a cost analysis can be performed for each proposal. The proposed equipment detail list is entered by selecting the **Proposal Items** tab on the top of the proposal screen.

The last steps (which are all optional) are to identify any optional items you may want to print on the proposal to help cross-sell additional products (these optional items do not get calculated in the price of the job), any recurring charges that may be part of your service, enter any closing remarks, and enter miscellaneous costs that you will incur to help calculate a more accurate job cost (miscellaneous costs do not print on proposals).

Once you have completed the above steps, you may print the proposal directly from the proposal screen by selecting the **PRINT** button. You will then be prompted to select various options that affect the way the proposal will be printed. You may even send the completed proposal directly to the prospect via fax by selecting your fax driver as the printer type in the Print Setup button found on the Print Proposal screen.

## Selecting A Proposal

Select the **PROPOSAL** button from the top task bar. A list of existing proposals will appear in order of prospect name. You may select to a proposal by simply entering the first few letters of the prospects last name (or company name) and the list will automatically search down to that section of the list where the proposal is listed.



The proposal list has various sort tabs available for your selection at the top of the list. These tabs perform the following sort/search functions:

### **Sort By Prospect Tab**

As mentioned above, the proposal list is sorted by prospect last name order and you may enter a full or partial name to search for a proposal.

### **Sort By Proposal No Tab**

Selecting this tab will resort the proposal list by proposal number order and you may then search by proposal number by entering a proposal number in the search field.

### **Sort By Date – Ascending**

Sort by Proposal Creation Date – Ascending Date Order

### **Sort By Date – Descending**

Sort by Proposal Creation Date – Descending Date Order

### **Sort By Disposition Tab**

Selecting this tab will resort the proposal list by grouping proposals with similar dispositions together. For example, all OPEN proposals will appear together, then all WON proposals, etc. To start a search at the beginning of one of the dispositions, enter the

disposition in the search field (Dispositions are the current stage of proposals that are predefined within Pursuit - Open, Won, Lost, Other).

**Sort By Probability Tab**

Selecting this tab will sort the proposal list in order of probabilities (High, Low, Medium, Other). To start a search at the beginning of a probability, enter the appropriate probability in the search field.

**Sort By Status Tab**

Selecting this tab will sort the proposal list in order of the status of the proposal. The status field is defined by the user and may contain any words that are appropriate (On Hold, Contract, Approved, etc.). To start a search at the beginning of a particular status, enter the status in the search field.

**Sort By Site Name**

Sort Proposals By Site Name

**Sort By Site Address**

Sort Proposals By Site Street Address

**Sort By Sales Rep**

Sort Proposals by Sales Rep Assigned To Proposal. Enter a valid Salesrep ID to sort proposals with that salesrep id's record listed on top.

**Sort By Phase**

Proposals may be sorted by the Phase they are currently in (Phase field on proposal screen.) You may also enter a specific phase code so that all proposals identified with that phase are displayed on the top of the list.

**Sort By Price – Ascending**

List Proposals in ascending order based upon job price.

**Sort By Price – Descending**

List Proposals in descending order based upon job price.

**Sort By Type**

Proposals may be sorted by the Proposal Type field. The proposal type field is a validated field that contains your own type values, which is another way to help categorize your proposals in a fashion that is important to your business.

Press ENTER on the highlighted proposal to bring up the proposal screen, or select the INSERT button to add a new proposal. Selecting the DELETE button will delete a proposal after you have verified the deletion.

## Proposal Template Button

The Template button provides a simple means to copy an existing proposal ('template') to a new proposal.

**Copy Proposal**

Create a Proposal From A Proposal Template

Proposal Template Style Or Proposal Number  ...

Copy Proposal To Prospect Number  ...

Duplicate Entire Proposal Or Select Sections SECTIONS ▼

Copy Proposal Overview/Closing Pages YES ▼

Copy Proposal Equipment/Photo/PDF List YES ▼

Copy Recurring Charges YES ▼

Copy Additional Costs YES ▼

### Proposal Template Style

Select an existing Proposal you wish to use as a 'template' for the new proposal. Templates are actually existing Proposals – categorized by type of job they represent – that can be copied as a new proposal and assigned to a different prospect. Click on the Lookup button [...] to see a list of Template proposals – based upon the job category they represent.

If you know the number of a proposal you want to use (instead of using the template list to identify a proposal) then enter the proposal number directly into this field.

### Copy Proposal To Prospect

Select the prospect from the prospect list that this new proposal will be assigned to. Click on the lookup button [...] for a list of existing prospects or click on INSERT from the list to create a new prospect (all proposals must be assigned to a prospect before the proposal can be created).

**Duplicate Entire Proposal Or Sections** You have the option to copy the entire proposal – as an exact duplicate of the original including all fields and lists – to a new proposal, or selecting which parts of the master proposal you want to copy to a new proposal. If you select ALL, the remaining options are disabled and the entire proposal will copy when you click on OK. Otherwise select the sections to copy.

- Copy Proposal Overview/Closing** To include the Template's overview and closing text on this new proposal, select YES.
- Copy Proposal Equipment/Photo/PDF** To include the Template's Item List and Photo List on this new proposal, select YES.
- Copy Recurring Charges** To include the Template's Recurring Charges onto this new proposal, select YES.
- Copy Additional Costs** To include the Template's additional cost list onto this new proposal, select YES.

### **Export to Alarm Billing Software Button**

This calls the 'Export Prospect To Billing Program' feature described in the Utilities Chapter of this documentation



## Entering Proposal Information

The proposal screen consists of 11 tabs that contain information about the proposal (**The PRINT button is described in detail at the end of this chapter**)

### General Tab

Proposal - ABC Corporation

OK Cancel Print

General Overview Proposal Items Options Recurring Charges Custom Fields Closing Financials Misc Costs Notes Contract

Proposal No 1 Dated 8/04/03

Prospect ABC Corporation

Contact Larry Wilson

Telephone 602-343-4323 Account 1

Email lw@abccorp.com

Site Name And Address

Name ABC Corporation Sites

Street 150 Main Street

Street 2

City Scottsdale

State AZ Zip Code 85020

TaxCode Scottsdale

Form Title Proposal

Proposal Type Change Order

Proposal Style Modern

SalesRep JRW

Project Phase Pre-Wire

Probability Level High

Job Status Contract

Starting Date 8/04/03

Completion Date 8/30/03

Withdraw After 30 (Days)

Type Of Building Office

Accessibility Drop Ceiling

Purchase Terms Own

Disposition Won Reason Reputation

Record will be Changed Printed

The general tab consists of basic prospect information and tracking information about the proposal. This tab should be filled in first.

**Proposal No** A proposal number is automatically assigned to a new proposal.

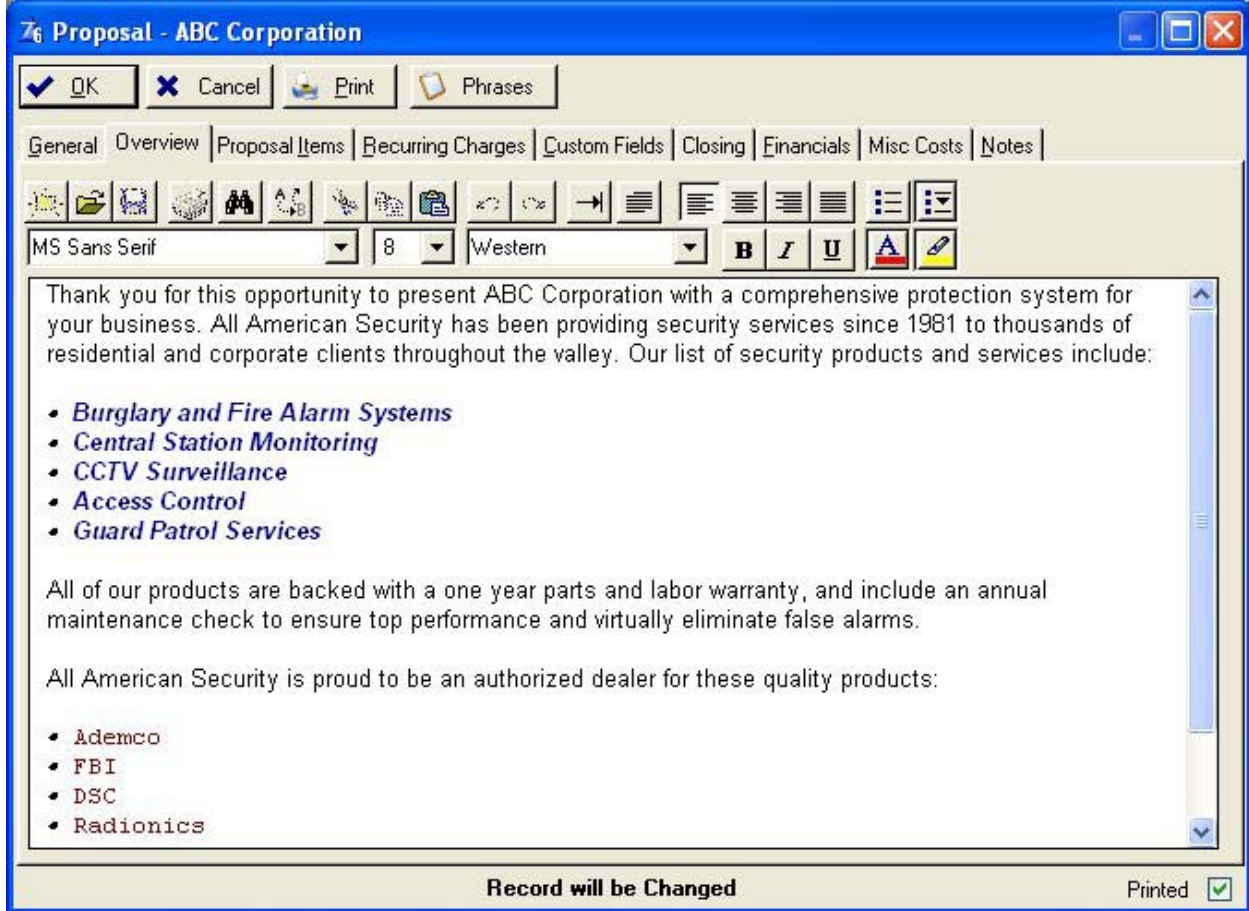
**Dated** This field defaults to today's date when creating a new proposal, but may be changed if desired. The label of this field may be different than the word 'Dated', based upon your system default settings.

**Form Title** This field defaults to the word PROPOSAL on a new proposal but may be changed to any appropriate title. This word will print on the printed proposal heading.

- Prospect** This field identifies which prospect this proposal is for. You must enter the prospect name exactly as it appears on the prospect management screen or select the [...] lookup button to display a prospect list. If the name entered is not found on the prospect file, a list of prospects will appear allowing you to select one. If you need to add the prospect to PURSUIT then you may press INS at this point and you will be sent to the prospect management screen.
- If the prospect address changes on the prospect record, you may update the proposal address as well by clicking on the Prospect lookup button [...] and reselecting that prospect. You will then be asked if you want the Site Name and Address information to be updated as well (Yes/No). Select yes to update to the new site name and address.
- Contact** The primary contact name on the prospect record will be entered.
- Telephone** The primary telephone number on the prospect record will be entered.
- Email** The primary email address on the prospect record will be entered.
- Site Information** Once you have identified the prospect in the previous field, the prospects name and address will appear under the Site Name And Address box. If the site name and/or address is different, you may enter another site name and address in these fields. When the proposal prints, the main prospect name and address will print on the left hand side of the proposal, and the site name and address will print on the right hand.
- If the prospect has multiple sites on file, a SITES button will appear to the right of the Site Name. Click on the SITES button to display a list of sites for this prospect. Select the appropriate site to fill in the fields in this section for that site.
- The Tax Code (County Code) field defaults to the County Code for that prospect (or site chosen). You may override the Tax Code if required. The Tax Code is used to determine the tax rate charged on taxable items.
- Proposal Type** This is a validated field that can be used in any fashion you wish to help identify this type of proposal on your proposal lists.
- Proposal Style** Pursuit currently has 4 style sheets to choose from to determine the printed format of the proposal. You may change styles at any time:
- |                |  |
|----------------|--|
| <i>Classic</i> | Times New Roman font (serif)   |
| <i>Modern</i>  | Arial font (sans serif)  |
| <i>Simple</i>  | Arial font (sans serif) without any boxes  |
| <i>OnePage</i> | Arial font (sans serif) concise proposal on one page (unless details require additional pages) |
- Project Phase** Identifies the current phase the project is in for tracking purposes. Possible values for this field include Pre-Wire, Rough-In, Trim, etc. This is searchable on the prospect list, as well as having it's own sort tab.

<b>Probability Level</b>	An excellent way to track job forecasting is through identifying probability levels for each proposal and updating them as you go through the various selling stages for a prospect. The valid probability levels in Pursuit are Low, Medium, High, and Other. Usually a new proposal starts out with a Low probability, and as you follow-up with a prospect and get closer to a possible sale, you should increase the probability level to reflect the possibility selling this proposal to the prospect. The proposal list has the capability of displaying proposals based upon their probability level.
<b>Job Status</b>	Enter the current status of this proposal. Examples include estimate, proposal, on-hold, contract, etc. This field gives you the capability of putting your proposals into different 'stages' for tracking purposes.
<b>Starting Date</b>	Enter the proposed start date for work to be done. Format = MM/DD/YY
<b>Completion</b>	Enter the proposed completion date for job (or you may enter the requested completion date if the job must be finished by a certain date). Format = MM/DD/YY
<b>Withdraw After</b>	Enter the number of days that this proposal is valid for. This number will be printed on the proposal.
<b>Type of Building</b>	The type of building where alarm system will be installed. This is a validated field. Building types include ranch, colonial, split, office building, etc. You may add to the included building types by pressing the INS key from the building validation list.
<b>Accessibility</b>	Enter the type of access you will have in installing the system, such as attic, basement, crawl space, none, etc. If there are several accesses, create your own from the validation list that is a combination of accesses.
<b>Purchase Terms</b>	Select if this job will be owned by the prospect or leased.
<b>Disposition</b>	Select if the proposal is currently OPEN, if you WON the job, LOST the job, or OTHER. By marking a proposal as WON or LOST you can get a handle on the reasons why you win or loose jobs with the statistical Disposition Report found in the Report section. This is a very helpful management report.
<b>Reason For Disp</b>	Enter the reason why your won or lost this job (Price, Quality, Availability, etc.). Reasons are validated.
<b>Sales Rep</b>	Specifies the sales rep ID that is assigned to this proposal. The salesrep ID is very important for searching proposals by sales rep, as well as restricting access to proposals by salesrep (see security administration for more information on restricting access by salesrep).

## Overview



The Introductory Overview Tab is used if you wish to have an introduction on your printed proposal. The introduction usually consists of information about your company, history, quality of work, overall warranty descriptions, types of system installation your company performs, etc. It is a free-form text area that is RTF (Rich Text) format.

*See RTF Format Controls in the 'Using Pursuit' Chapter for detailed information on using the RTF buttons on this screen.*

You may choose to have the introductory overview print on it's own page, or print just above the proposed list of items. This option is selected in the System Defaults section.

### Phrase Button

You may use the Phrase button to select a paragraph already saved in the Phrase list and place it onto the Overview section. For a description of setting up Phrases, please see the Phrase section later in this chapter.

## Proposal Items Tab

Part Number	Qty	Total Cost	Unit Price	Total Price	Time	Part Description
AD-20	1.00	189.00	389.00	389.00	90	Ademco Vista 20 Panel
AD-6150	1.00	134.00	274.00	274.00	60	Ademco 6150 Keypad
AD-450	1.00	45.00	75.00	75.00	15	Ultrasonic Motion Detector
AD-423D	2.00	50.00	50.00	100.00	60	Ademco Door Contact
YA-NP76	1.00	25.00	60.00	60.00	10	Yuasa NP76 6 Volt 7AH Battery

**Items Summary**

Cost 443.00  
 Price 898.00  
 Profit\$ 455.00  
 Profit% 50.67  
 Install Time 3: 55

**Breakdown**

Parts 613.00  
 Labor 285.00

Record will be Changed

Printed

This section contains a detailed listing of all equipment/items that will be sold to the prospect. This section also calculates job profit/loss and is used by the Job Costing report.

PURSUIT uses the proposed equipment list to print a job cost report, as well as to calculate the total price of the job that will appear on the proposal. There are several options available to customize the proposal to your specific needs. The printed proposal includes pricing information, part type and location printed on the proposal form. You may choose not to print any or all of these details. The part type and location details are selectable from the Set Company Header section of Utilities (see the OVERVIEW chapter in the beginning of the manual). The pricing detail option is selected when you print out the proposal.

The Items Summary section in the lower right-hand corner keeps a real-time running tab of cost and pricing factors (including current profit/loss margins and percent) based upon items entered in this section. It will also show you a breakdown of parts and labor prices. These values are calculated based upon costs and charges for both parts and labor that you have entered in Inventory (which is used as the defaults for each item on the proposal – but may be overridden with exact costs/charges for each item listed).

There are various functions available from the Items Tab which are described below (starting with the buttons on the right side of the list):

## Pick List Button

The Pick List is a very useful feature of Pursuit that allows you to select multiple items from inventory at a time when creating the item list for a proposal. You may continue to select an unlimited number of items from the Pick List before selecting FINISH to update the proposal with items selected. You may also bring up the Pick List as many times as necessary to continue building the Item List of the proposal.

The Pick List also supports rearrangement of columns by right-clicking on the list (see Rearranging Columns in the Using Pursuit chapter for more information on this feature).

### Show Favorites

This option will limit the display of items in the Pick List to just those inventory items marked as 'Favorites' in Inventory. Place a checkmark in this box to activate the favorites list. If you have thousands of items in inventory, the favorites list is beneficial in reducing the time it takes to search for commonly sold items. See 'Favorites' field in the Inventory chapter for more details.

### Sort Tabs

Select a sort tab to reorder the list of inventory. You may also search by that specific criteria. You may sort inventory by part id, description, part category, vendor, manufacturer code, UPC code or Bin Number. You may also click on the 'Picked Items' sort tab to see a list of only currently selected items on this pick list (items with a quantity entered).

**Quantity Buttons** Once you have highlighted an item you wish to 'pick' for the proposal (click once on item to highlight), click on the appropriate quantity button and that quantity amount will be filled in. If you need to change the quantity, enter a quantity above 10, or enter a quantity with decimal places then just double-click on the highlighted item and the quantity field may be edited with any quantity amount you wish.

**Finish** When you are finished picking all of the items you wish to include on the proposal, click on the FINISH button.

## Add / Change / Delete Item Button

Selecting the Add, Change or Delete Button from the item list will bring up the Proposed Equipment form. Here you may select the specific item to add or modify (if you press on Delete from the Item List, you will be asked to confirm the delete and then that item will be deleted from the list).

Qty	Unit Cost	Price Each	Extended	Service	Taxable
	0.00	0.00	0.00	0.00	Yes

### Part Number

Enter the part number of the item to be included on the proposed item list, or select the lookup button to display a list of items from the master inventory list. This part must exist on your inventory file (see the chapter on inventory maintenance later in this manual). If the part is not on file, you may add the part by selecting the INSERT button on the inventory list.

**NOTE:** Pursuit provides the option to use by default a different selector for parts other than the Part ID. You may setup Pursuit to find an item by Manufacturer ID and UPC code as well (UPC code is helpful when using bar code scanners to create the proposal). To change the method for part lookup by ID, go to System Defaults/Proposal Tab and select the preferred Part lookup method in the 'Select Inventory By' field.



<b>Part Description</b>	The part description will be automatically displayed after the part number above has been selected.
<b>Qty</b>	Enter the quantity of this part that will be installed. The quantity affects the extended price that will be charged to the customer. You may enter a number or use the incremental counter by selecting the up/down arrows to the right of this field.
<b>Unit Cost</b>	Enter <u>your</u> cost for this part. Defaults to cost already on file for this part in inventory.
<b>Price Each</b>	Enter the price you charge for this part. Will default to the price already on file for this part in inventory.
<b>Extended</b>	Calculated field based upon quantity and price each amounts.
<b>Service</b>	The service field represents the amount that you would charge for this part on a service contract. This will default to the service contract amount already on file for this part in inventory
<b>Taxable</b>	Select YES if this item is a taxable item, NO if it is not. Will default to Taxable default in System Defaults section.
<b>Install Location</b>	This describes for the prospect the location where this part will be installed (basement, hallway, front door, etc.). This field can be printed on the proposal and may also be used to determine the sort order in which items will print on the proposal (a nice feature to show the prospect a comprehensive listing of all items to be installed, based upon their location). If the proposal items are sorted by Location, you may also have each location subtotaled (Print option).
<b>Part Category</b>	Enter the type of part this is. This is mainly used so that the prospect may better understand what each part is. The category field is validated and must exist on the category validation list. You may choose to sort your proposal items by part category, and have it subtotaled by category as well.
<b>Warranty Period</b>	Enter the manufacturers warranty period for this part. The warranty will default to the period already on file for this part.
<b>Installation Time</b>	Enter the number of total minutes estimated to install this part (will automatically be filled in from the main inventory file and multiplied by the quantity).
<b>Print Item On Proposal</b>	Select YES to have this item print on the proposal. Select NO if this item is to be displayed on the screen only (for internal use)
<b>Print Detailed Descript</b>	If the item has a Detailed Description associated with it (as defined in Inventory for that item), then select YES if you wish to have the detailed description print right below this item on

the proposal. Select NO to omit the printing of the detailed description.

Detailed Descriptions are RTF Formatted paragraphs that contain detailed descriptions for an item. For more information on Detailed Descriptions, please see the chapter on Inventory.

### ***Unit Cost Breakdown Section***

The following breakdown fields are used in calculations to determine job costing and summary calculations that appear on the Proposal screens.

<b>Material Cost</b>	Your cost in purchasing this item (defaults from inventory)
<b>Material Charge</b>	What you charge for this item (defaults from inventory)
<b>Labor Cost</b>	Your labor cost for installing this item (defaults from inventory)
<b>Labor Charge</b>	What you charge for labor for installing this item (defaults from inventory)
<b>Show Labor</b>	Select YES if you wish to show the above labor charges as a separate item on your proposal. Select NO to show only the price of the item on the proposal.

If your selling price already includes your labor charges, then select NO. However, if you wish to have labor show as a completely separate item on the proposal (the subtotal section of the proposal will have a line called 'Labor' right below the subtotal line) then select YES. If you do select YES, make sure your Material Charges and Labor Charges are accurate since the Material Charges will be the price charged next to that item on the proposal, and the Labor Charge will be the price added into the LABOR subtotal section.

### ***Print Image Attached To Inventory Section***

**Print Photo** If there is an IMAGE file already attached to inventory for this part (Document Images button in inventory) then the Print Photo field will default to YES. If you do not wish to have the IMAGE print with this item, then select NO. An IMAGE file is any file on your network that is stored as a JPG, BMP or GIF graphic format and is listed as an IMAGE type in the Document Images section of inventory for that item.

You may associate a photo with each item in inventory. Then when that item is selected on a proposal, the photo will automatically come across onto the proposal as well. The following two fields will determine how the photo will print if you selected YES to this Print Photo field.

**Print Photo Location**

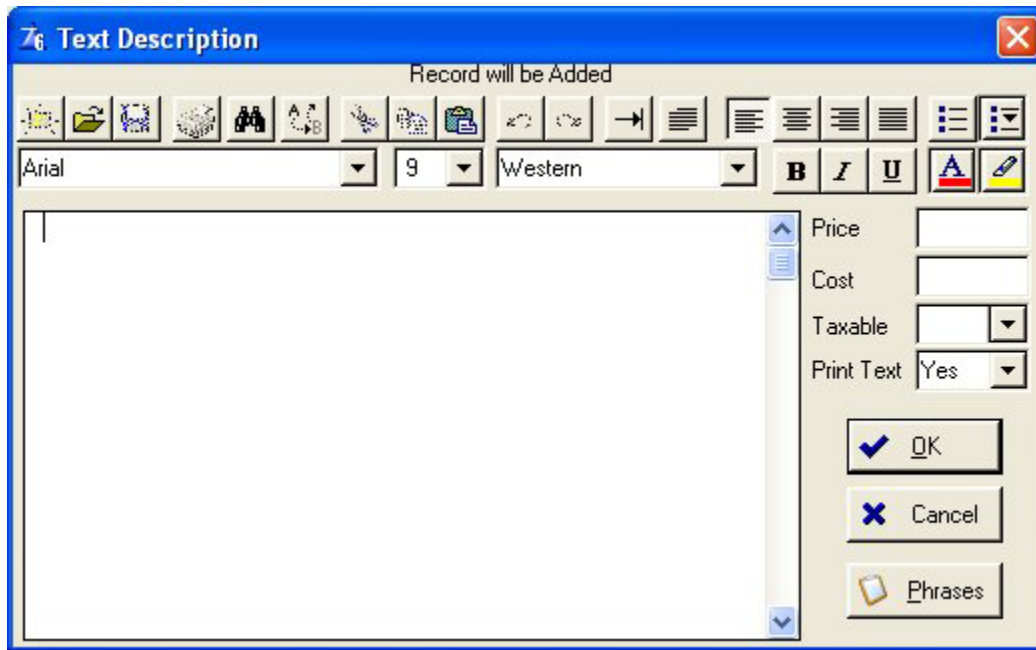
If Print Photo is YES, select where the Photo is to print:

With Item	Photo will print right below item
Separate Page	Photo will print on it's own separate page
None	Photo will not print

**Photo Size (With Item)**

If you have selected 'With Item' as the photo location, you have the choice of selecting three print sizes (the photo will print right below the item).

## Add Text Button



Selecting the Add Text button will display a text box (RTF format supported) which may be used to enter free-form text that is to appear on the proposed equipment list section. For information on using the RTF controls, please see 'RTF Control' in the Using Pursuit chapter.

Although you would generally enter text in the Overview or Closing section of the proposal (as described earlier in the chapter), it may be necessary from time to time to add text directly within the equipment list. This text box scrolls by moving the vertical scroll bar tab. You may create as many of these 'text boxes' as necessary on your proposed item list and adjust the positioning of them by clicking on the UP and DOWN arrows displayed on the proposed item list.

If the text entered in this section is to be associated with an amount, select the TAX (yes/no) and enter the amount in the amount field.

**Price** If a price is associated with this text then enter it in this field.

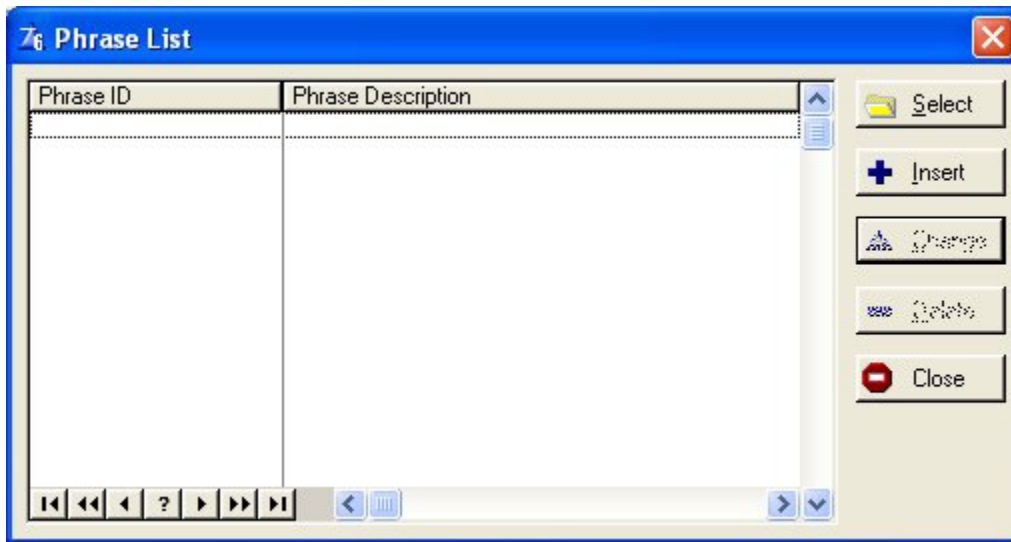
**Cost** If a cost is associated with this text then enter in this field (for job costing)

**Taxable** If a price is entered, specify if Taxable Y/N.

**Print Text** If you want this text box to print on the proposal, select YES. If you want this text box to be used for internal departmental use only (so it will not print on the proposal) select NO.

Click on OK to save the text box (it will be represented with the word TEXT on the proposal screen, but will print in it's entirety on the actual proposal.  
Click on CANCEL to cancel changes to this text.

## Phrases Button



A 'PHRASE LIST' has been included in this section to help cut down on typing (this phrase list is also available in other areas through Pursuit). A phrase list is simply a depository or holding area of your commonly used descriptions and phrases. You may build the phrase list to include anything which you would normally say on a proposal. Each phrase needs to be uniquely identified with a phrase code of your choice. To access the phrase list, select the Phrases button, then double-click on the phrase to be added to the proposal text. The phrase will automatically be added to the end of your existing text.

To add a new phrase to the phrase list, select the INSERT button from the phrase list and enter a unique codeword for the phrase, then enter the phrase.

## **Proposed Item List (Continued)**

### **Blank Line Button**

Selecting this button from the proposed item list will insert a blank line on the next available line. You may then move the position of the line up or down on the list by selecting the UP or DOWN arrow buttons. The word 'BLANK' will appear on the screen list, but will not print on the actual proposal.

### **Arrow Buttons**

You may adjust the position of any item on the proposed item list by highlighting the item and selecting the up or down arrow button until the line is in the correct position.

### **Identifying Labor Costs On The Proposed Item List**

There are two ways to separate out Labor (only if you want Labor to show as a separate line item. Normally Labor is included in the price of each item printed on the proposal and would not be separated out).

The first way is described in detail in the 'Unit Cost Breakdown Section' above. This utilizes the cost breakdown fields of Labor and Materials so that Pursuit may calculate labor separately and print it in the Subtotal area of the proposal as a separate entity.

The other way you can print Labor charges separately is to create an item in inventory called 'Labor' as the Part ID (any description you wish) and the Part Category MUST be called 'LABOR'. Then select that part id on the proposal item list and enter the appropriate qty and price. Since the item has a category of 'LABOR', Pursuit automatically places that line at the end of all listed items on Pursuit.

## Photos Button

Clicking on the Photos button on the upper section of the screen displays the Proposal Graphics List. This list consists of images you want to include for printing on the proposal.

The list is populated automatically whenever an item is placed on the Proposed Items list that already is associated with a graphic image (as defined in inventory).

However, you may also attach photos that are not related to any specific item and have them printed on the proposal as well (**NOTE:** Only photos that are associated to a particular item can be printed below that item. Photos that are not associated to a particular item will be printed on a separate page at the end of the proposal – with one page per photo printed).

Description	File Name	Print	Photo Location
Ademco 6150 Keypad	keypad6150.jpg	YES	With Item
Visa Family	Vista15family.jpg	YES	With Item

Click on Insert/Change to bring up the Photo Selection Form:

## Photos Button - Insert Proposal Image

**76 Proposal Image** [Close]

Record will be Added

**Enter A Graphic Image To Print With This Proposal**

Description: Pursuit Graphic

File Name: C:\Pursuit 2003\pfw splash.GIF [...]

Print With Proposal: YES [v]

Photo Location: With Item [v] Part ID: DP-PRS [...]

Photo Size: Small [v]

**Description To Print With Graphic (Separate Page Location Only)**

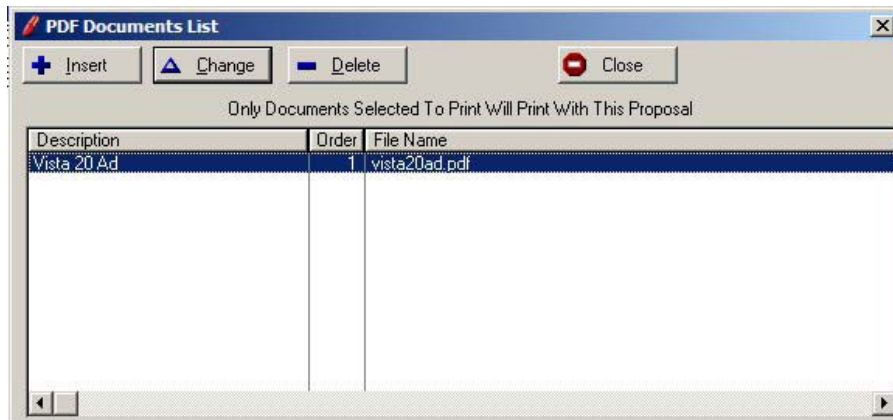
[OK] [Cancel]

- Description** Enter a description that describes this image.
- File Name** Enter a file name of the graphic image to be printed. Click on the [...] file lookup to see a directory of your network and select the appropriate file from the list. Supported graphic formats include JPG, BMP, and GIF.
- Print W/Proposal** Select YES to include this image on the printed proposal
- Photo Location** Select where this image is to print on the proposal:  
*With Item* Image will print right below item it is associated with  
*Separate Page* Image will print on it's own page (along with the following image description) at the end of the proposal printout.
- Part ID** Only if Photo Location is selected as 'With Item'. In order for an image to be printed under a specific item, you must select the Part ID of the item this image is associated with.
- Photo Size** Only if Photo Location is selected as 'With Item'. Select Small, Medium or Large to depict the size of the image to print under the associated item.
- Print Description** Only if Photo Location is selected as 'Separate Page'. A description of the photo may be printed below the photo on the photo page.



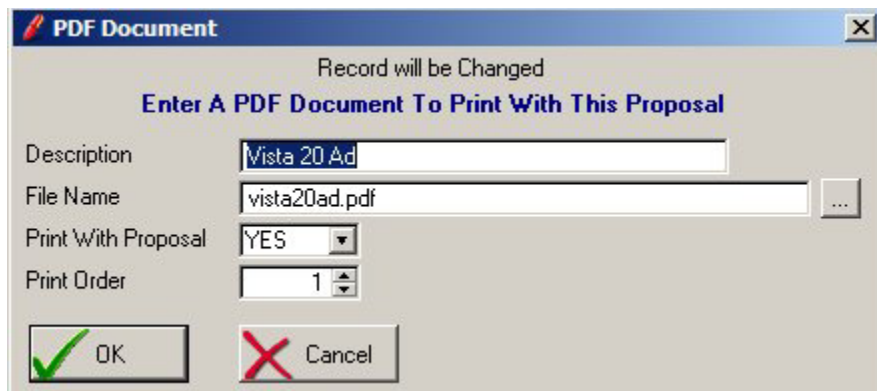
## PDF Button

Clicking on the PDF button on the upper section of the screen displays a list of PDF documents that are associated with this proposal. You can have an unlimited number of PDF documents associated per proposal, and identify which ones are to be printed along with the proposal. The PDF documents that are to print will be automatically added to the entire Proposal after the proposal itself.



Click on Insert to add a new PDF document to this list or click on Change to modify a PDF listed. To delete a PDF from this list, click on Delete.

To insert or change a PDF document, the following PDF selection screen appears:



**Description** Enter a description of this PDF document

**File Name** Click on the [...] button to select the PDF file from a directory tree of your network.

**Print W/Proposal** Select Yes to print this PDF document along with the proposal

**Print Order** If you have several PDF documents on this list, the Print Order determines the order in which the PDF documents will print on the proposal.

## Create PO Button

### **For Integration With Alarm Or Service Express Billing Packages Only**

To convert this proposal to a purchase order, click on the Create PO button. Pursuit will create the appropriate purchase order records from this proposal. The purchase order may then be accessed, reviewed and modified within the Alarm or Service Express billing systems (Alarm and Service Express are Z-Micro Technologies billing and service management programs that produce billing, inventory control, purchase orders, service management, etc.).

**Create Purchase Order From Proposal**

You are about to create a Purchase Order from this Proposal. The Purchase Order will be created in your Alarm/Service Express program and may be accessed from there. Your Proposal will remain unaffected.

Create PO For Specific Vendor Or Autoselect

(AutoSelect Creates One PO For Each Vendor Represented On Proposal)

Add Item Only If Not In Stock

*Create PO For Specific Vendor Or Autoselect:*

**Autoselect** Using this selection will allow Pursuit to create a purchase order for each vendor associated with items on this proposal. For example, if 4 items are normally purchased from Vendor #1, and 3 items are normally purchased from Vendor #2 (as indicated in inventory), then two purchase orders will be created (one for Vendor 1, and one for Vendor 2).

**Specific Vendor** Use this selection if you wish all items on the proposal to be ordered on the purchase order from one specific vendor only. If selected, a field will be displayed asking to select the Vendor.

**If Not In Stock** Pursuit can identify those items which are currently in stock (if you are using the inventory control feature of Alarm/Service Express) and only create a purchase order for those items that are not currently in stock at your location.

Click on OK to start the purchase order creation process. Click on Cancel to abort.

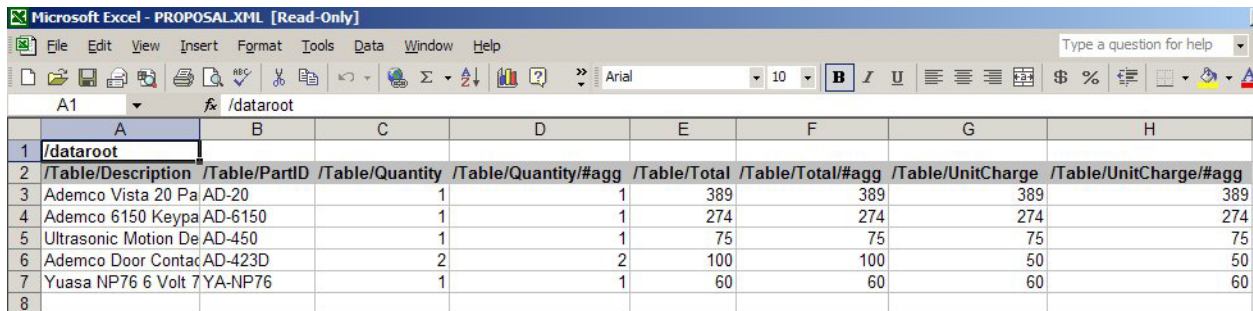
## Export To XML Button

Clicking on this button will create a file in your Pursuit folder called 'PROPOSAL.XML'. This file consists of the entire proposed equipment list you have entered in the 'Proposal Items' tab of the proposal screen.

There are no prompts for this function. Just click on the button and this above file will be created.

The XML file format is a very versatile format that can be recognized by many programs including Microsoft Excel. By opening up this file within Excel, you will have a spreadsheet of all of the items included on your proposal equipment list.

Here is an example of a PROPOSAL.XML file created with the Export to XML button, opened up within Microsoft Excel.



The screenshot shows a Microsoft Excel spreadsheet titled 'PROPOSAL.XML [Read-Only]'. The spreadsheet contains a table with 8 columns and 8 rows. The columns are labeled as follows: A: /dataroot, B: /Table/Description, C: /Table/PartID, D: /Table/Quantity, E: /Table/Quantity#agg, F: /Table/Total, G: /Table/Total#agg, H: /Table/UnitCharge, I: /Table/UnitCharge#agg. The data rows are as follows:

	A	B	C	D	E	F	G	H
1	/dataroot							
2	/Table/Description	/Table/PartID	/Table/Quantity	/Table/Quantity#agg	/Table/Total	/Table/Total#agg	/Table/UnitCharge	/Table/UnitCharge#agg
3	Ademco Vista 20 Pa AD-20		1	1	389	389	389	389
4	Ademco 6150 Keypa AD-6150		1	1	274	274	274	274
5	Ultrasonic Motion De AD-450		1	1	75	75	75	75
6	Ademco Door Contac AD-423D		2	2	100	100	50	50
7	Yuasa NP76 6 Volt 7 YA-NP76		1	1	60	60	60	60
8								

## Options Tab

You can list optional items on your proposal that are not part of the 'proposed equipment' list but rather additional add-ons that your client can select to add to the proposal. Optional Items are not calculated in the price of the job nor calculating in job costing. Click on the Options tab to display the Optional Items List:

Part Number	Description	Qty	Unit Price	Total Price	Category
RP1000ELC	Napco English Language Keypad	1.00	135.00	135.00	Keypad
RP1016D	Napco Designer Keypad	1.00	145.00	145.00	Keypad
NT-IM110	Nutone Wireless Intercom	1.00	175.00	175.00	Intercom

Since the Options tab contains similar functionality to the Proposal Items tab described in a previous section of this documentation, please refer to that section for a detailed explanation of the functions available.

**Add To Proposal** If a customer chooses to add an optional item to the Proposed Items list, click on the Add To Proposal button and Pursuit will automatically move this optional item over to the proposed items list.

## Recurring Charges Tab

76 Proposal - ABC Corporation

OK     Cancel   

[General](#) | [Overview](#) | [Proposal Items](#) | **Recurring Charges** | [Custom Fields](#) | [Closing](#) | [Financials](#) | [Misc Costs](#) | [Notes](#)

Charge Code	Description	Cycle	Bill Amount	Tax	Monthly
CENTRAL	Central Station Monitoring	M	25.00	Y	25.00

**Recurring Summary**

Monthly Totals

Costs	7.00
Charges	25.00
Profit\$	18.00
Profit%	257.14

Record will be Changed

Printed

If you will be proposing recurring charges as part of this proposal, enter the recurring charges in this section. This list does not get included in the total price of the job, since they are recurring charges only. They are treated as a separate entity on the printed proposal and may be printed or omitted based upon your print option settings.

The Recurring Summary box on the lower-right hand corner of the screen calculates a summary of recurring costs, charges and your profit/loss (in dollars and percent) on the listed recurring charges.

Information you may enter for each recurring charge is defined below:

## ***Adding /Change Recurring Charges***

76 Recurring Charge

Record will be Added

Recurring Code CENTRAL

Bill Period M

Monthly Charge 25.00

Bill Amount 25.00

Taxable Y

Monthly Cost 7.00

Print Charge On Proposal Yes

OK Cancel

### **Recurring Code**

Enter the service type code that reflects the description of recurring charges for this prospect. If you currently own the ALARM or SERVICE EXPRESS billing system, Pursuit will automatically lookup your existing recurring charge codes from that program. This alleviates the need to re-enter the service descriptions again.

### **Bill Period**

Enter the billing frequency for the above recurring charges. The billing cycles are (M)onthly, (Q)uarterly, (S)emi-annual, (A)nnual, (N)one

### **Monthly Charge**

Enter the amount of the monthly charges that will be billed for the recurring charge above. This amount is a monthly amount, not a total amount for the billing cycle.

### **Bill Amount**

Calculated by Pursuit. This field displays the actual amount that will be billed per cycle. (Quarterly billing is 3 times monthly charge, Semi-annual billing is 6 times monthly charge, etc.).

### **Taxable**

Select if recurring charge is Taxable Y/N

### **Monthly Cost**

Enter your monthly cost for this recurring charge.

### **Print Charge On Proposal**

Select YES to have this recurring charge print on the proposal. Select NO to omit this recurring charge from the printed proposal

## Custom Fields Tab

76 Proposal - ABC Corporation

OK Cancel Print Setup Fields

General Overview Proposal Items Recurring Charges Custom Fields Closing Financials Misc Costs Notes

Click On CheckBox To Print Field On Proposal

User Field 1	<input type="text"/>	<input type="checkbox"/>	Dates	
User Field 2	<input type="text"/>	<input type="checkbox"/>	User Field 9	<input type="text"/> <input type="checkbox"/> ...
User Field 3	<input type="text"/>	<input type="checkbox"/>	User Field 10	<input type="text"/> <input type="checkbox"/> ...
User Field 4	<input type="text"/>	<input type="checkbox"/>	User Field 11	<input type="text"/> <input type="checkbox"/> ...
User Field 5	<input type="text"/>	<input type="checkbox"/>	User Field 12	<input type="text"/> <input type="checkbox"/> ...
User Field 6	<input type="text"/>	<input type="checkbox"/>	Validated	
User Field 7	<input type="text"/>	<input type="checkbox"/>	User Field 13	<input type="text"/> ... <input type="checkbox"/>
User Field 8	<input type="text"/>	<input type="checkbox"/>	User Field 14	<input type="text"/> ... <input type="checkbox"/>
			User Field 15	<input type="text"/> ... <input type="checkbox"/>
			User Field 16	<input type="text"/> ... <input type="checkbox"/>

Record will be Changed

Printed

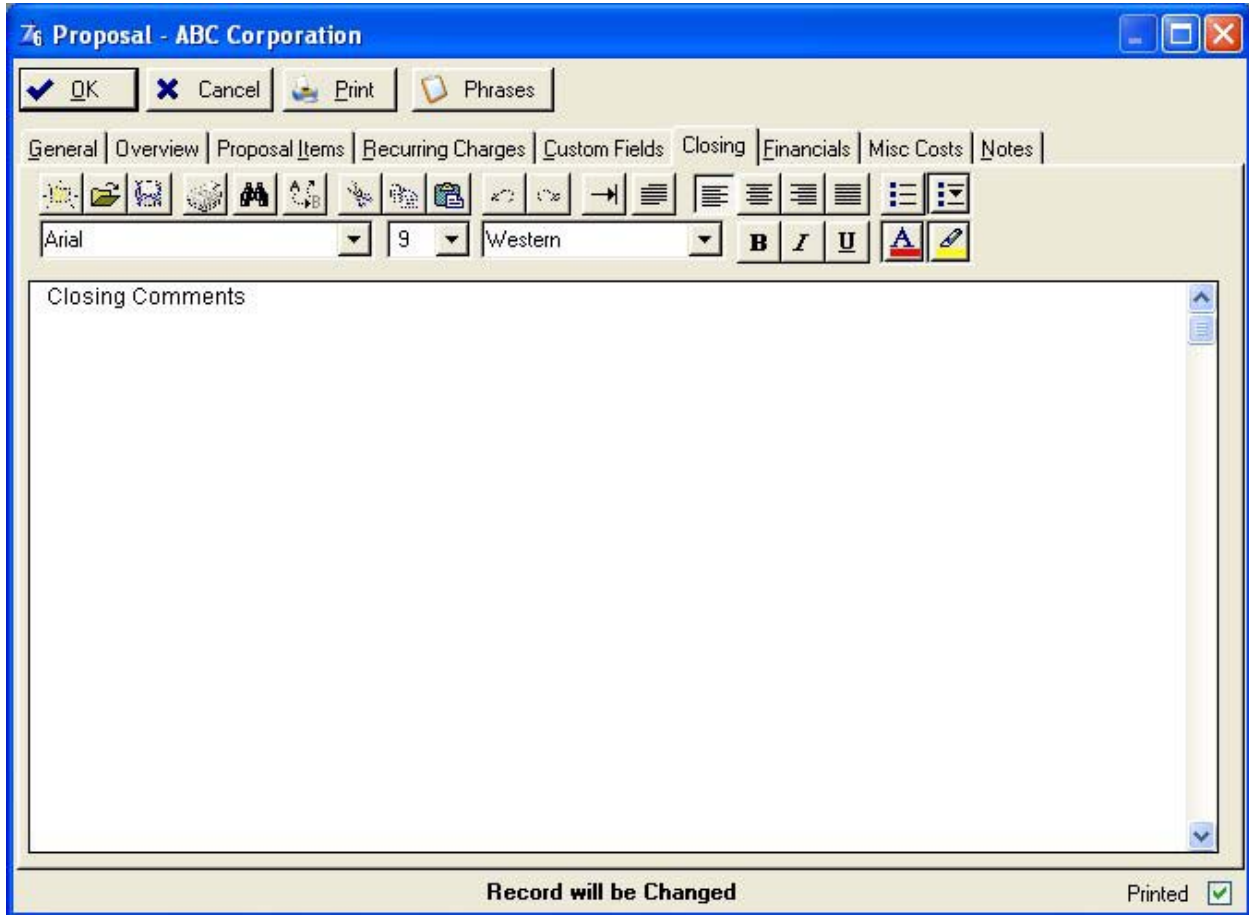
There are 16 user-definable fields available on a proposal. The first 8 fields are free-form text fields. The next 4 fields are date-specific fields (only dates may be entered). The last 4 fields are validated fields, meaning the values entered must be valid from a list of values you enter on the validation list.

Each of the definable fields may be included for printing on the proposal. To do so, place a checkmark in the box to the right of the field(s) you wish to print on the proposal.

The labels of the user-defined fields, as well as the print checkbox status, can be defined by clicking on the 'Setup Fields' button on the top of the screen. This is a global setting for all proposals created within Pursuit.



## Closing Comments



Similar to the Introductory Overview tab, the Closing tab allows you to enter RTF formatted text for closing comments that will appear on the printed proposal. See the RTF Controls section in 'Using Pursuit' for detailed information on using the RTF control buttons.

If closing comments are entered, you may have them print on a separate page at the end of the printed proposal, or have the closing comments print after the items list on the same page (assuming there is enough space left on that page – otherwise it will overflow to the next page). The settings to determine page break is set in the System Defaults section.

## Financial Information Tab

76 Proposal - ABC Corporation

OK   
 Cancel   

|
 |
 |
 |
 |
 |
 |
 |

Optional Price Override (Choose Only One)

Total Job Price

Markup Percent  % Markup Basis

Payment Terms

Signed Contract	\$	<input type="text"/>	Or	<input type="text"/>	25.00	%
Stat Of Job	\$	<input type="text"/>	Or	<input type="text"/>	25.00	%
75% Completion	\$	<input type="text"/>	Or	<input type="text"/>	25.00	%
Job Completed	\$	<input type="text"/>	Or	<input type="text"/>	25.00	%

<b>Total Financial Overview</b>				
	Cost	Price	Profit\$	Profit%
Parts	318.00	613.00	295.00	92.77
Labor	135.00	285.00	150.00	111.11
Item Total	443.00	898.00	455.00	102.71
Misc Costs	9.00			
<b>Job Totals</b>	<b>452.00</b>	<b>898.00</b>	<b>446.00</b>	<b>98.67</b>
Recurring Charges	7.00	25.00	18.00	257.14

Record will be Changed      Printed

Selecting this tab displays a screen that consists of price override information and payment schedule information. Information entered on this screen affect the financial calculations that are printed on the last page of the proposal.

### Total Job Price

Optional. If you use the Proposal Items tab (proposed equipment list), the total job price will be automatically calculated from the parts list. However, if you wish to charge a different amount than that calculated from the parts list, you may override that amount by entering a job price in this field.

**NOTE:** If you override the calculated price by using this field, you should not print detailed item prices on the proposal. The 'Print Detail Prices' option will automatically be set to NO on the Print Options screen in this situation. Although you can override this setting, it is not recommended since the listed prices for each item would not equal your job override price and may therefore be confusing.

**Markup Percent**

Optional. Adjustment to total job price (either up or down). This number is a percent (25.00%, 33.3%, 50.00%, etc). You may place negative sign before the number is entered if you wish to adjust the price of the job downwards (-25.00%).

**Markup Basis**

Optional. Only used if Markup Percent field is used. Select the basis for the markup percent calculation:

*Cost* Markup is based upon a percentage of your total cost for the job (total cost is the calculated field labeled 'Job Totals' under the COST column of the Financial Overview box).

*Price* Markup is based upon a percentage of the total calculated price of the job (total price is the calculated field labeled 'Job Totals' under the PRICE column of the Financial Overview box).

**Payment Terms**

You have the option of entering up to 4 deposit time periods and amounts. The deposit 'description' field for each of the 4 deposits may be defined as needed. For example, the first deposit field may represent 'Initial Deposit' and then the appropriate deposit amount or percentage to follow. The second deposit field may represent 'At Completion', and so forth. The deposit descriptions default to the user-definable descriptions found in the Utilities menu (Proposal Heading Defaults) the defaults may be changed.

Each deposit may be entered by either a dollar amount or a percentage. If a percentage is entered, PURSUIT will calculate the amount of this deposit based upon the percentage entered and the job price.

The Deposit Field Labels, as well as the Percentages (if used) will default from your System Default settings.

You may elect to restrict access to the Financial Tab based upon the user security profile. Please refer to the 'Security Administration' section of this documentation for restriction features.

## Misc Costs Tab

76 Proposal - ABC Corporation

OK   
 Cancel   
 Print

[General](#) | [Overview](#) | [Proposal Items](#) | [Recurring Charges](#) | [Custom Fields](#) | [Closing](#) | [Financials](#) | **Misc Costs** | [Notes](#)

Enter Any Additional Costs Not Included In Proposal Items List (For Job Costing Only)

Cost Code	Description	Quantity	Cost	Extended	Cost Category
Design	Design Plans	0.00000	0.00	0.00	Vendor
Wire	Wiring	90.00000	0.10	9.00	Wire

**Additional Costs Summary**

Total 9.00

Record will be Changed      Printed

For all costs associated with this proposal that are not already included in the Proposal Items List (items on the Proposal Items List can have their own cost breakdown amounts), then you may enter all additional costs in this list. All costs added to this list are included in the Total Financial Overview section (Financials Tab). This allows for a complete accountability of all costs associated with this job, and therefore results in a true depiction of profitability on this job.

Costs do not show up on printed proposals. They are used only for the job cost report, and for the calculated financial overview as shown on the Financials Tab.

The lower right-hand corner of this tab shows the total of all additional costs listed.

Clicking on the Add/Change button allows you to enter additional cost information as described below:

## Add/Change Button

The screenshot shows a dialog box titled "Miscellaneous Cost". At the top, there are two buttons: "OK" with a checkmark icon and "Close" with a red circle and slash icon. Below the buttons, there are several input fields:

Cost Code	Wire	...
Description	Wiring	
Cost Category	Wire	
Quantity		0.00000
Cost		0.00
Extended		0.00
Measurement	Feet	

**Cost Code** Identifies the code used to represent this particular cost. Click on the lookup button [...] for a valid list of codes, or enter new codes.

**Description** A description for this particular cost code

**Cost Category** Enter a category that depicts this code. The Cost Category is used on the job cost report for subtotaling by cost type.

**Quantity** Enter the quantity of units for this cost

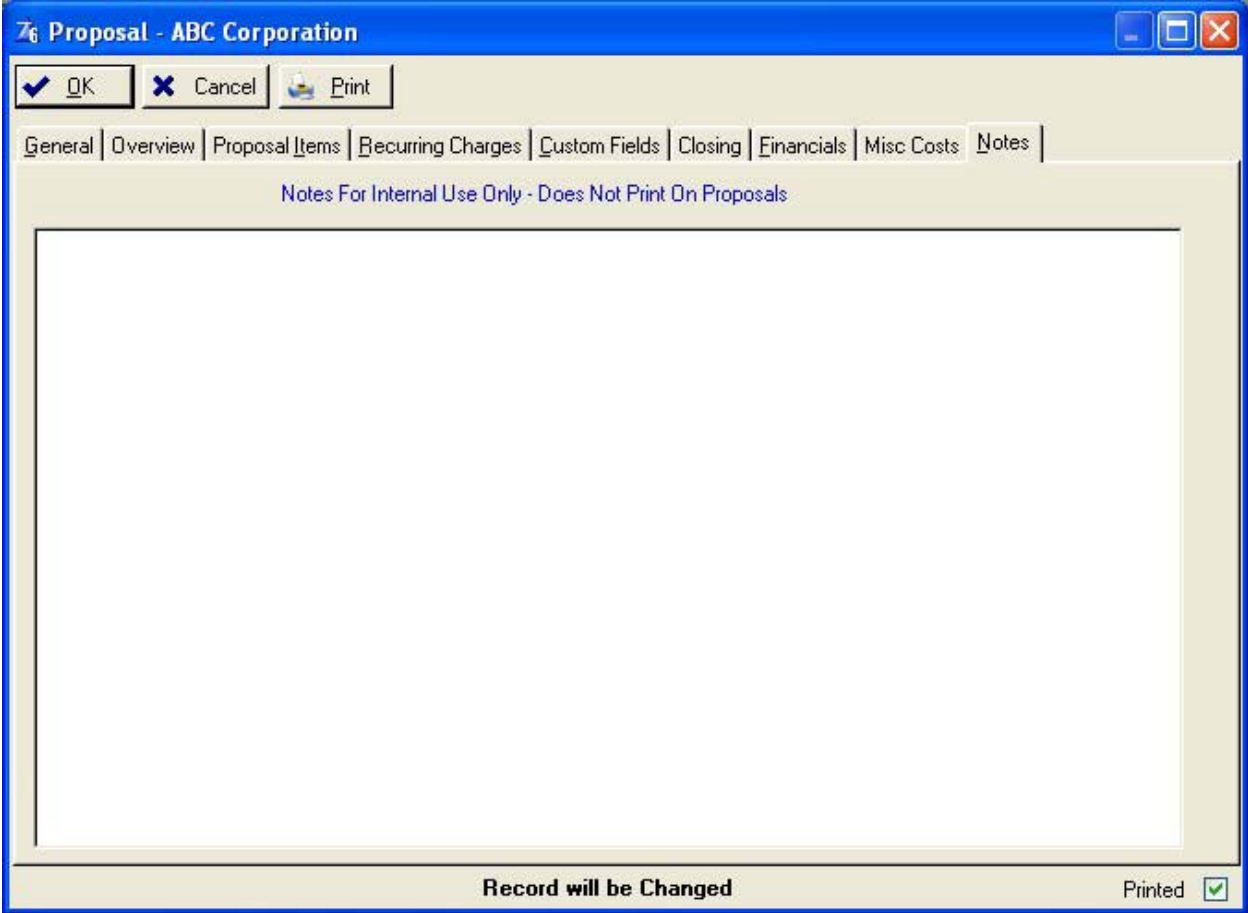
**Cost** Enter the unit cost amount

**Extended** A calculated field of total cost for this cost code (qty \* cost)

**Measurement** The type of measurement used to represent this cost (ie: Feet, Hrs)

Click on OK to save the cost. Click on Cancel to abort.

**Notes Tab**



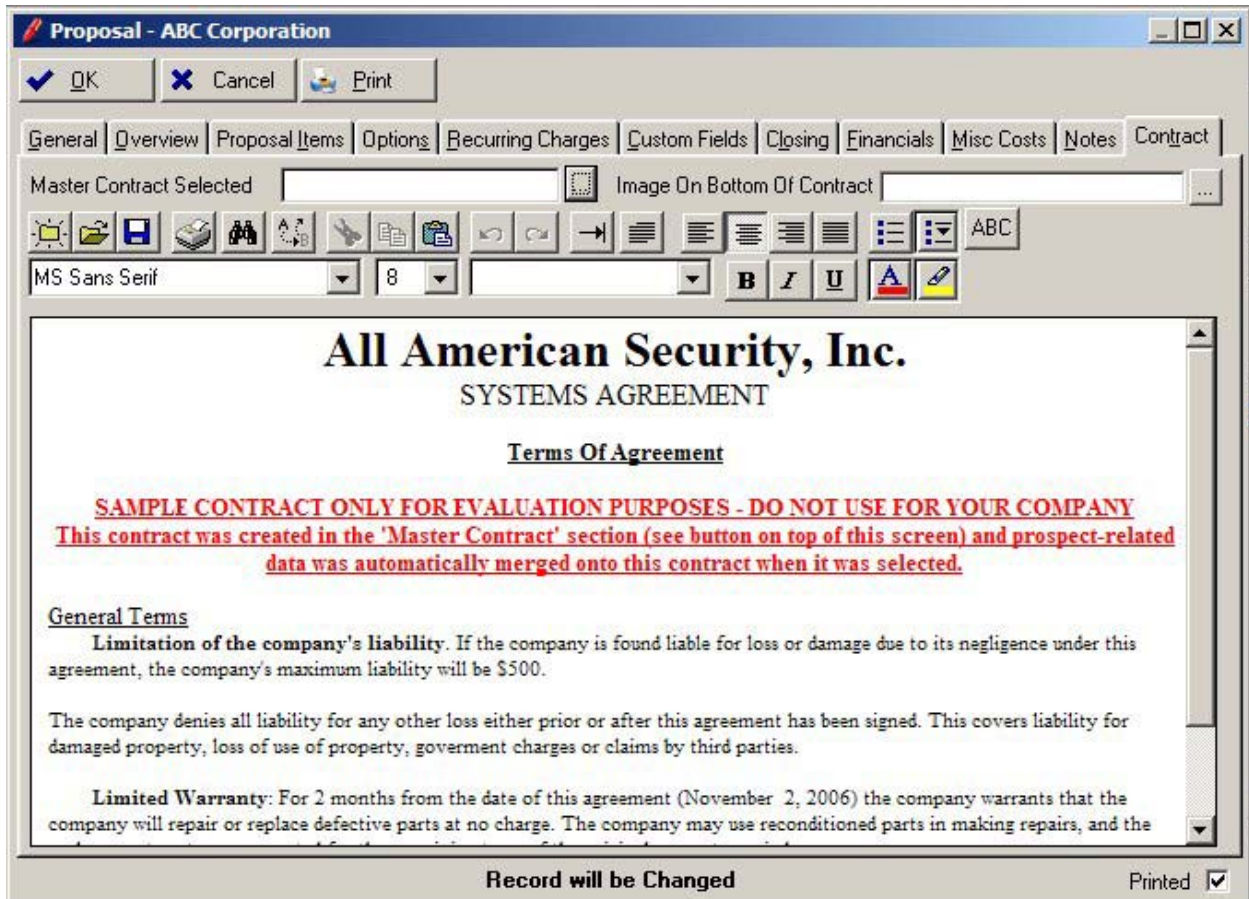
The Notes tab is used to track information pertaining to this proposal. It is for internal departmental use only and will not be printed on the proposal.

## Contract Tab

Pursuit has a powerful contract writer built in that allows you to easily include your legal contract along with any proposal. In addition to being able to enter your contract with various typefaces, fonts and other text attributes, Pursuit can also merge pertinent prospect data onto the contract in order to customize your contracts to each client.

Contracts print along with your proposal and will print near the end of the sequence of other pages. When you select a 'Master Contract' to use on this proposal (see below), any merge codes created on the master contract will automatically be replaced with the appropriate merged data on this screen (as seen in this example).

The contract tab consists of the following screen:



### Master Contract Selected

Click on the [...] lookup button to select which Master Contract you want to use for this particular proposal. Since you do not want to re-enter the text for your contract for every proposal you create, Pursuit lets you create Master contracts in the Master Contract section (accessed by clicking on this [...] button or selecting Utilities/Master Contracts). You may store an unlimited

number of contracts in the master contract area, but typically most companies would only need to store one or two types of contracts. Please see the section on 'Master Contracts' for detailed information on creating a master contract, along with it's merge capabilities.

**Image on Bottom of Contract**

You may elect to include a graphic image on the bottom of the printed contract. Examples of graphic images you may decide to use include signature images or advertisements. The image file should be 1" high by 7.5" wide. If your graphic is smaller or larger than those dimensions, the recommended method to fit within this size is to create a rectangle in your graphics program of these dimensions and hide the rectangle lines. Then place your image within that rectangle and save as a JPG, GIF or BMP image.

**RTF Controls**

Please refer to the beginning of this documentation that details the various features of RTF controls.

**Contract Text**

Although you can enter a contract in this screen manually, it is usually best to first enter your contract in the Master Contracts section of Pursuit (accessed by clicking on the [...] button of the Master Contract Selection field, or selecting Utilities/Master Contracts). Then, for each proposal you simply click on the Select Master Contract to identify which contract you want to use with this proposal. Once selected, Pursuit will merge onto the contract any data that was specified by the merge codes placed on the master contract. If you wish to enter a contract manually in this section, you may certainly do so. However, merge codes would not be used since you are entering a contract specifically for this one proposal.



## Printing A Proposal

### Print Button

Print Proposal

Text To Appear Above Job Pricing  
Price Of Proposed Job

Recurring Charges Text  
Recurring Charges

Print Proposal Text Page(s) YES

Print Equipment Detail Page(s) YES

Sort Detail Page By DEFAULT

Print Equipment Detail Prices YES

Print Recurring Charges YES

Print Optional Items List YES

Print Proposal Graphic Images YES

Print Total Price Page YES

Print Closing Remarks YES

Print Contract YES

Number Of Copies 1

Preview and Print

Email

Cancel

\* Adobe PDF Reader Required

The last step in the proposal process is to preview it, email it, or print it out. Here you have several options, including which part of the proposal to print. You may always reprint any part of the proposal as many times as you wish from this section. Proposals are always converted to a PDF file format first, since this is an extremely versatile format to preview and print, as well as attach to emails. You do not need a PDF writer – that is built into Pursuit. However, to display PDF documents you will need to have Adobe PDF (freely available on Adobe.com) on your computer.

You have several output selections for the proposal (all are affected by the print settings):

#### Preview/Print

Selecting the Preview and Print button will display the entire proposal – in the format that it will be printed in – on the screen. This is a very fast and easy way to review the entire proposal before printing. Since the Proposal is created in the popular PDF format, once displayed you may then click on the Printer icon to print the proposal out. You also may use any selection features available in the Adobe PDF preview, including zoom, page and printer selections, search capabilities, etc.

**Email**

The Email button automatically converts the entire proposal (in the style sheet selected on the proposal) into a PDF document, attaches it to an email, addresses the email to the email address on file for this proposal, and emails the proposal out all at the touch of this one button. No additional steps or products are necessary to email a proposal.

The PDF document that is created from this Email button is called 'PROPOSAL.PDF' and is saved on your hard drive.

In order for the Email button to function correctly, please make sure you have your email settings tab set correctly in the System Defaults section of Pursuit (Utilities/System Defaults).

To print the proposal, select the Print button from the proposal screen. A pop-up window will appear asking you to select which parts of the proposal to print. These include:

**Text To Appear Above Job Pricing**

These three lines of text will appear on the last page of the proposal where the pricing of the proposal is printed. This text defaults to the text found on the Proposal Heading Default section of the Utilities menu. You may override this text.

**Recurring Charges Text**

This text will print as a heading to the recurring charges section of the last page of the proposal. This text defaults to the text found in the Proposal Heading Default section of the Utilities section.

**Print Proposal Pages(s)**

Select YES to print the Proposal Text pages or NO to skip this section.

**Print Equipment Detail Page**

Select YES to print the proposed equipment list on the proposal form, otherwise select NO.

**Sort Detail Page By**

This drop-down selection list determines the order in which the proposed items will print on the proposal. If Location or Category is selected, you also have the option of Subtotaling each section (see Subtotal Field below). The items may be sorted as follows:

- Default* Same order as it appears on the screen.
- Part* List will print in part number order.
- Location* List will print grouped by location (Location sub-headings will print above each new location group).

*Category* List will print grouped by part category (Category sub-headings will print above each new category group).

**Print Equipment Detail Prices**

If you would like the prices printed for each proposed part listed on the proposal, then select YES, otherwise select NO. This selection can be entered only if you select YES to print the equipment detail page described above.

By Default, this selection will be NO if you have entered a Job Price Override (either specific price override, or markup percent) since it would be confusing to show a proposal with item pricing and also have a different override price show – the detailed prices would not add up to the override price. However, if you wish to select YES you may do so even in this scenario.

**Print Recurring Charges**

Select YES to print the recurring charges list.

**Print Optional Items List**

Select YES to print any optional items entered in the Options tab of the proposal

**Print Proposal Graphics Images**

Select YES to print proposal graphics (photos) that are listed in the Proposal Images List

**Print Total Price Page**

The Total Price Page is a page describing the total price of the job, sales tax, payment terms, terms and conditions, and a signature line(s). Select YES to include this page in your proposal.

**Print Closing Remarks Page**

Select YES to include any Closing Comments you have entered on the Closing tab.

**Print Contract**

If you have a contract (ie: terms and conditions) that you have in the Contract tab of the proposal, and want to have it printed along with the proposal then select YES otherwise select NO.

**No Of Copies**

Select the number of copies you wish printed (Works only with windows drivers and printers that support the copy feature).

**Print Subtotals**

Only Displayed If 'Sort Detail Page By' selection is Location Or Category. Select YES if you wish the proposal to print a subtotal price under each Location Or Category section printed. If you do not want subtotalling by category or location, select NO.

## Chapter 5: Inventory Maintenance

So that it is easier to list proposed equipment on the proposal, an inventory file allows you to keep a list of all parts that you normally deal with. If you own the ALARM or Service Express billing systems, the inventory file used in those programs will be integrated into the Pursuit program. ALL INVENTORY STOCK CONTROL IS PERFORMED WITHIN THE BILLING PROGRAM ONLY! Pursuit does not affect inventory stock EXCEPT when exporting a proposal to the billing software and the invoice creation option is selected.

Part ID	Description	Unit Cost	Price	Reorder	On Hand	Vendor Name	Part Category	Manufacturer Code	UPC Code
AD-20	Ademco Vista 20 Panel	189.00	389.00	3.00	5.00	ADI	Panel	Vista 20-P	
AD-2878	Gold Passive Infrared	25.00	35.00			ADI	PIR	AD-1878	209809348
AD-423D	Ademco Door Contact	25.00	50.00			ADI	Contact		
AD-450	Ultrasonic Motion Detector	45.00	75.00		-4.00	ADI	Motion Sensor	AD-450	0982342342
AD-6150	Ademco 6150 Keypad	134.00	274.00	4.00	9.00	ADI	Keypad	6150	
DD-491	Napco Blank PROM	100.00	150.00			ADI	PROM	NA-2343	02340293
FB-5100	FBI Keypad	50.00	75.00			King Alarm	Keypad	234230	09802398
Gold Security	Gold Security Kit	1,200.00	2,100.00		-1.00	All American Alarms	Internal Kit		
NT-IM110	Nutone Wireless Intercom	37.25	175.00			Triad	Intercom	0234-23422	322200-A
NT-LB76WH	Nutone 2 Note Electric Chime	57.50	86.25			Triad	Bell	03242-234	2234292
DP-PRS	Optex Reflector Kit, Silver	9.25	12.95			ADI	Miscellaneous	0239423	234242211
DP-SU200	Optex Solar Panel	116.50	175.00			King Alarm	Solar	2048203	294723
PA-KXT 30865	Panas Door Intercom	21.95	55.00			King Alarm	Intercom	23420980	2098093428
RP1000ELC	Napco English Language Keypad	99.00	135.00		-2.00	ADI	Keypad	230982340	2094023822
RP1016D	Napco Designer Keypad	99.00	145.00			ADI	Keypad	0983423	89023424
YA-NP76	Yuasa NP76 6 Volt 7AH Battery	10.50	19.00		-2.00	ADI	Battery	099348342	882929323

### Sort By Part ID

Sort and select inventory list by Part ID

### Sort By Description

Sort and select inventory list by Part Description

### Sort By Part Category

Sort and select inventory list by Part Category

### Sort By Vendor Name

Sort and select inventory list by Vendor name

### Sort By Manufacturer Code

Sort and select inventory list by Manufacturer Code

### Sort By UPC Code

Sort and select inventory list by UPC Code.

### Query Button

Search inventory based upon Query selections. Refer to 'Search By Query Button' in 'Using Pursuit' Chapter for detailed instructions on using the Query button.

## Adding a Part to Inventory

To add a part to the inventory file, press **Insert** from the Inventory maintenance list. The following information may be entered for each part:

Inventory Maintenance - AD-20  
Record will be Changed

General Information | Pricing | GL Account Codes

Part ID (SKU#) AD-20

Part Description Ademco Vista 20 Panel  
Detailed Description

Part Category Panel ...

Sub Category Burglary ...

Manufacturer Code Vista 20-P

UPC Code 234222322

Vendor Name ADI ...

Warranty Period 1 Year

Install Time (Avg) 90 (Minutes)

Service Contract Amt 20.00

Print Item On Proposal Yes Taxable Y

OK  
Cancel  
Part Components  
Documents Images

Stock - Main Location

On Hand 5.00  
Reorder Level 3.00  
Bin Number

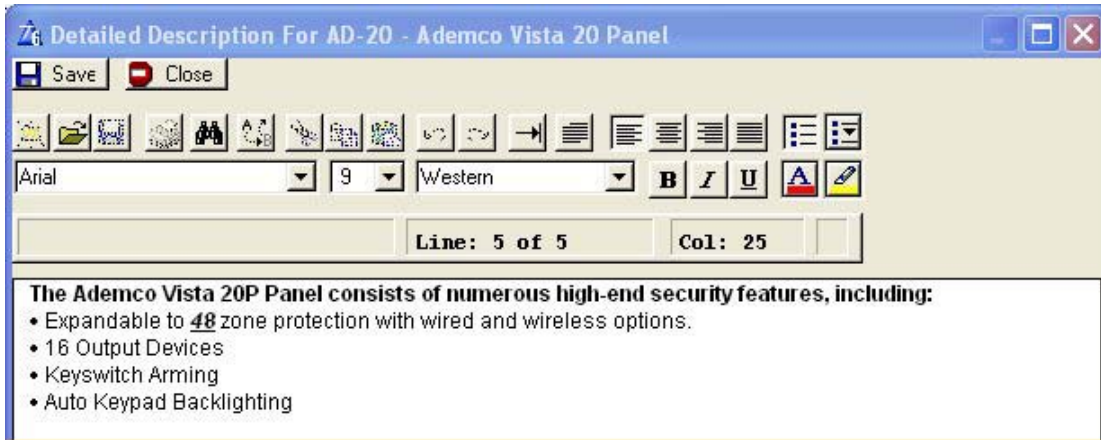
Additional Stock Locations

Display On Inventory Favorites List

**Part ID** Enter the part number for this part. The part number must be unique and a number must be entered into this field.

**Part Description** Enter a name and/or description for this part. You may enter any description you want up to 30 characters.

**Detailed Description** The Detailed Description button accesses an RTF formatted screen that allows you to create a lengthy description that is attached to this item (vertical scroll bars will appear if text scrolls beyond display). If this part is placed on the proposal item list, this detailed description text will print just below it.



**Part Category**

You can categorize this part by using the Category field. A category entered here must already exist on the Category validation table, otherwise you may enter a new category into the list. Select the [...] button to display the part category list. Using categories allow you to sort parts by category and to list items on the proposal in category sort order.

**Sub Category**

You can add an additional category to this part by using the Sub category field. Click on the [...] button to access your valid list of sub categories, or enter a new sub category in the validation list and then select for this part. A sub category can be used to identify what type of job this part is usually used for (ie: Fire, Burglary, etc.) and thereby be easily 'grouped' with other like parts on the Inventory list for easier identification when creating a proposal for that type of job.

**Manufacturer Code**

If there is a separate manufacturer code to identify this part, enter that code in this field.

**UPC Code**

If you will be using a bar code reader to scan items onto the proposal, enter the item UPC code.

**Vendor Name**

Enter the name of the vendor where this item is usually purchased. If a vendor name is entered, it will be validated against the vendor validation list. Select the [...] button to display a list of valid vendors.

**Warranty Period**

Enter the manufacturers warranty period such as '1 year', '90 days', etc.

**Install Time (Avg)**

Enter the number of minutes it takes on average to install ONE of these items. The install time will be used by Pursuit to calculate the total estimated installation time for a job when a proposal is created (Displayed on the Financial Tab).

**Service Contract Amt**

If you determine your service contract prices based upon the

value of equipment installed, then enter the price you charge on the service contract if this part is installed.

**Print Item On Proposal** Default setting to determine if this item usually prints on a proposal (normally set to YES).

**Taxable** Default setting to determine if this item is taxable.

**Display On Favorites List** Put a checkmark in this checkbox to have this item included whenever you display a 'Favorite Item' view of the inventory file or pick list. Since inventory may consist of thousands of parts, it may be beneficial to identify just those parts that are 'favorites' to help select a part more quickly when creating a proposal. The Favorite List view is easily turned on and off so you still have access to all other parts at any time you are creating a proposal or viewing the inventory list.

## Cost Accounting Tab

### Labor And Material Cost Breakdown Section

In order for Pursuit to calculate accurate job costing, the following fields should be filled in accurately. These values are default values, and therefore will automatically carry over when the item is selected on a proposal. Since they are default values, they may be overridden on each individual proposal as needed. If the Labor and Materials prices are entered, you have the further option of having the printed proposal breakout the labor charges as a separate subtotal.

Labor And Materials Cost Breakdown		
	Your Cost	Price Charged
Labor	40.00	90.00
Materials	149.00	299.00
Installation	189.00	389.00

Additional Price Levels	
Price Levels Defined In System Defaults Section	
Service	0.00
Repair	0.00

Stock - Main Location	
On Hand	5.00
Reorder Level	3.00
Bin Number	

**Labor Cost**

Enter your cost for labor to install this part.

**Labor Price Charged**

Enter the labor price charged to the customer for installation.

**Material Cost**

Enter the amount it costs you to purchase this part from your supplier. If you purchase from several distributors at various prices, then enter the average cost.

**Material Price Charged**

Enter the amount that is charged to the customer for this part.

**Total Pricing Cost**

Enter the total cost of Materials and Labor. The label of this field will reflect the label you entered for 'Price Level 1' in System Defaults/Inventory tab if you are using Multi-Level Pricing.



- Total Pricing Charged** Enter the total price to charge for Materials and Labor. The label of this field will reflect the label you entered for 'Price Level 1' in System Defaults/Inventory tab if you are using Multi-Level Pricing.
- Additional Price Levels** If you have turned on the Multi-Level pricing feature of Pursuit (activated in the System Defaults/Inventory Tab), this section will be displayed. The labels you have assigned to Price Level 2 and Price Level 3 will also be displayed. Enter the values of this part based upon these additional price levels. The price entered is the full 'Price Charged', not a breakdown price of labor or materials.
- General Ledger Codes** For Display Only. Entered in Alarm/Service Express.

## Document Images

Record will be Added  
Document May Be Any File Type Registered Within Windows.

Document Description: Key Pad A1300 - Layout

Document File Name: KEYPAD1300.JPG

Document Type: IMAGE \* Only IMAGE Files Can Print On Proposals

Print With Proposal \*: YES

OK

Cancel

Print Image

**Description To Print On Proposal**

Key Pad layout for Keypad 1300

You may associate an unlimited number of documents to this part. A document may be any file on your network that is registered to a particular windows-based program (ie: Word document for Microsoft Word, DXF file for AutoCad, PDF document for Adobe Acrobat, etc.).

The Document Image list may also contain image files (Bitmap (BMP), GIF, JPG) that consist of product photos, etc. When an image file such as this is included in the document image list, it can be printed on the proposal directly underneath the item it is associated with, or on it's own separate page. The following fields determine the type of document on this list, and if an IMAGE file the placement of this item on a proposal. Keep in mind these are default settings that will be carried over to a proposal when this item is selected, and therefore may easily be overridden to different settings for any particular proposal.

**Document Description** Reference description of this document – for internal use.

**Document File Name** Path and file name of document file. Click on the [...] file lookup button to select file from Windows Explorer.

**Document Type** Select the type of document this file represents. You may use any file that is registered to a windows program (most files will be registered in windows to the specific program used to create and/or edit that file).

**NOTE: If this is a photo image that is to be printed on a proposal, you MUST select IMAGE as the Document Type.**

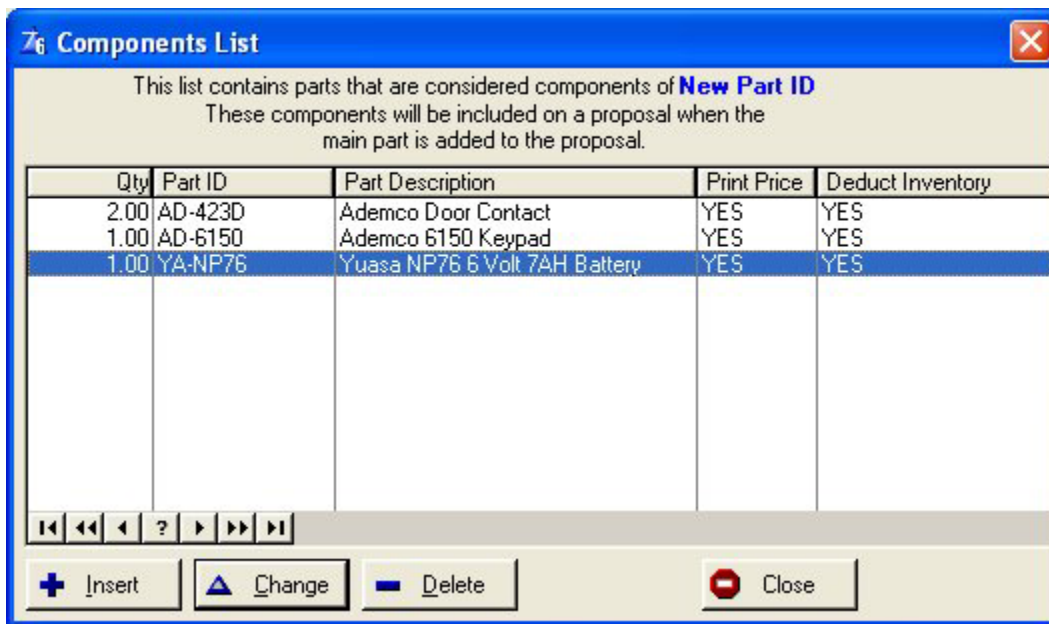
**Print With Proposal** Only valid if Document Type is IMAGE.  
Select Yes for this image to print on a proposal.

**Description On Proposal** Only valid if Document Type is IMAGE.  
If this image will print on it's own page of the proposal, enter a description that will print as a footer to the image. If this image will be printed under an item, this description is not used.

**Print Image Button** To print a sample of the document (IMAGES only) click on the Print Image button.

**View Button** On the Document Images List screen. Any document type. Click on the VIEW button to automatically launch the program that document is registered with and place the document within that program. For example, if a document has a filename of ADEMCO150.pdf and you click on view, Adobe Acrobat will automatically be launched and ADEMCO150.pdf will be ready to view within Acrobat.

### **Part Components (Kit Assemblies)**



This list contains parts that are considered components of **New Part ID**  
These components will be included on a proposal when the main part is added to the proposal.

Qty	Part ID	Part Description	Print Price	Deduct Inventory
2.00	AD-423D	Ademco Door Contact	YES	YES
1.00	AD-6150	Ademco 6150 Keypad	YES	YES
1.00	YA-NP76	Yuasa NP76 6 Volt 7AH Battery	YES	YES

Navigation buttons: [Back] [Forward] [Home] [End] [Help] [Refresh] [Print] [Close]

Buttons: + Insert, ▲ Change, ■ Delete, ● Close

A very useful feature available in Pursuit (and the ALARM and Service Express billing systems as well) is the ability to assign a number of components that are to be sold when the 'master' component is sold. This is commonly referred to as kit assemblies or bill-of-materials. To illustrate the concept of kit assemblies, take the following example:

You typically sell a protection system consisting of:

- 1 alarm panel
- 2 keypads
- 1 smoke detector
- 1 battery
- 1 infrared detector

## 2 door contacts

You can make up a 'master' part in the inventory file called 'GOLD500'. This part would then have a list of the above components as its 'kit assembly'. Whenever you create a proposal to sell part number GOLD500, the components listed above will automatically be entered onto the proposal for you, along with their prices (optional).

Using kit assemblies can reduce the amount of time it takes to create a proposal, especially if you sell the same types of systems to your customers. You can use any part in your inventory file as a 'master' part, and any part can be a component of as many 'master' parts as necessary.

Setting up a list of components for a part is simple:

- 1) Select **INVENTORY** button from the Top Taskbar
- 2) Select **Inventory List**
- 3) Highlight the part which you wish to add components to and press ENTER.
- 4) Select the **PART COMPONENTS** button to bring up the component list.

You are now ready to add a list of components for this part (components are simply other parts that are already on your inventory file. A component must already exist in the inventory file).

Press the **Insert** key to start entering the first component to the list. Once the Insert key has been pressed, the assembly part screen appears as follows:

<b>Component Quantity</b>	Enter the quantity of this component that is to be sold when the main part is sold.
<b>Component Part ID</b>	Enter the Part ID of this component. If you do not know the part number, type any character in this field and the inventory file will pop-up. You may then choose the part number from your list of items in inventory. If you need to add this component to your inventory, you may do so from the inventory list at this point.
<b>Component Part Desc</b>	The part description for this component will be entered automatically.
<b>Print Price</b>	If you want the price of this individual component to print on the proposal, select YES. Normally if the master part has a total price, select NO here.
<b>Deduct From Inventory</b>	If you are using Alarm or Service Express, this indicates if this component is to be deducted from inventory when it is included as part of a master part.

To save this component, select OK. The component will be added to the kit assembly list and you will be returned to that list. Repeat this process until all components have been added to the list for this master part.

You may modify or delete any component from the kit assembly list at any time. To do this, go into the inventory maintenance list and select the master part. Then press the **PART COMPONENT** button to bring up the Part Components list. You may then press ENTER to modify a component, or press Delete to delete a component from this list.

### ***Stock - Main Locations***

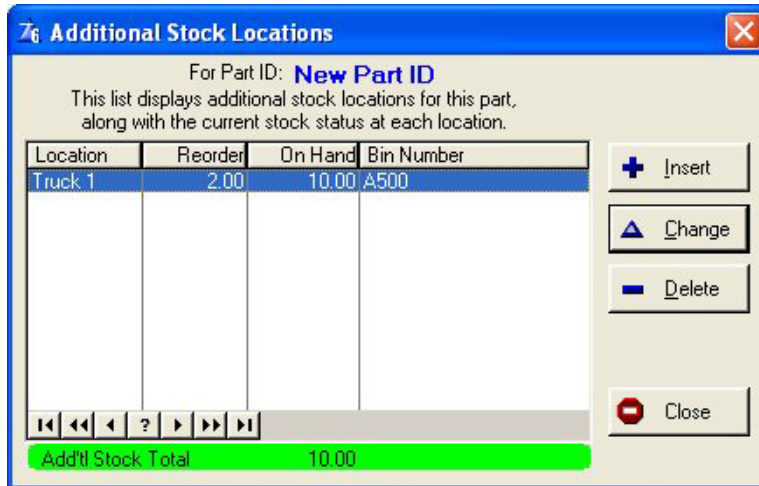
#### ***The following fields are used for Inventory Tracking Only:***

- On-Hand:** Current stock status of this item. Inventory tracking only used in the ALARM and Service Express billing systems, although Pursuit allows you to enter and view the current stock count.
- Reorder Level:** The reorder level is a 'flag' you can set so that you can be reminded when your stock for this particular item is running low (used by the ALARM and Service Express billing programs only).
- Bin Number:** If your inventory is stored in a warehouse-style manner (in pre-numbered 'bins' for easy locating), then enter the bin number of where this item is stored. This number is strictly used to help you identify where this particular item is physically located in your inventory.

### ***Tracking Inventory In Multiple Locations***

#### ***Additional Stock Locations***

Pursuit has the capability of looking up inventory that is located in additional locations (such as in your trucks, other office locations, etc.). Inventory that is located in other locations besides the Main location can be entered by selecting the **ADDITIONAL STOCK LOCATIONS** button from within the Masters Parts Data Entry screen. This section is maintained by the ALARM and Service Express billing systems, although they may be viewed within Pursuit.



When this button is selected from the master parts screen, a list of additional locations will appear if you have already entered locations for this part. If this is the first time you are adding a location for this item, the Additional Stock Location data entry screen will appear as follows:

**Part ID (SKU#):** The part id field will already be filled in with the part id for this part.

**Location Name:** Enter the name of the location where this item is also stocked. Examples of location names include TRUCK1, TRUCK2 (you can also use the actual vehicles license plate number or the name of the technician that is assigned to that truck). The location name is not validated but you should be consistent when entering the name.

**Reorder Level:** This field determines the minimum level of stock you should keep on hand for this item at this location.

**On-Hand:** Enter the current stock count at this location for this item. This should only have to be entered once. The ALARM and Service Express billing systems will automatically update the stock levels any time an item is listed on the product invoice.

**Bin Number:** If you label the shelves or 'bins' where your inventory is physically located at this location, then enter the bin number in this field.

Press the OK button to save this screen. You will then be returned to the Additional Stock Location list, with this location now listed. If you would like to add additional locations for this item, then press the Insert key from the Additional Stock Location list.

### **Inquire / Edit a Part**

To review or modify a part already on the inventory maintenance file, select **INVENTORY** button on the top taskbar. Highlight the part to be viewed or modified and press ENTER. You may now make any changes to the file and select OK when finished to save the changes. Changes will not affect the information currently stored on the customers' detailed equipment lists.

### **Deleting a Part**

To delete a part, highlight the part on the inventory maintenance list and press Delete, then ENTER.

## Chapter 6: Appointment Calendar

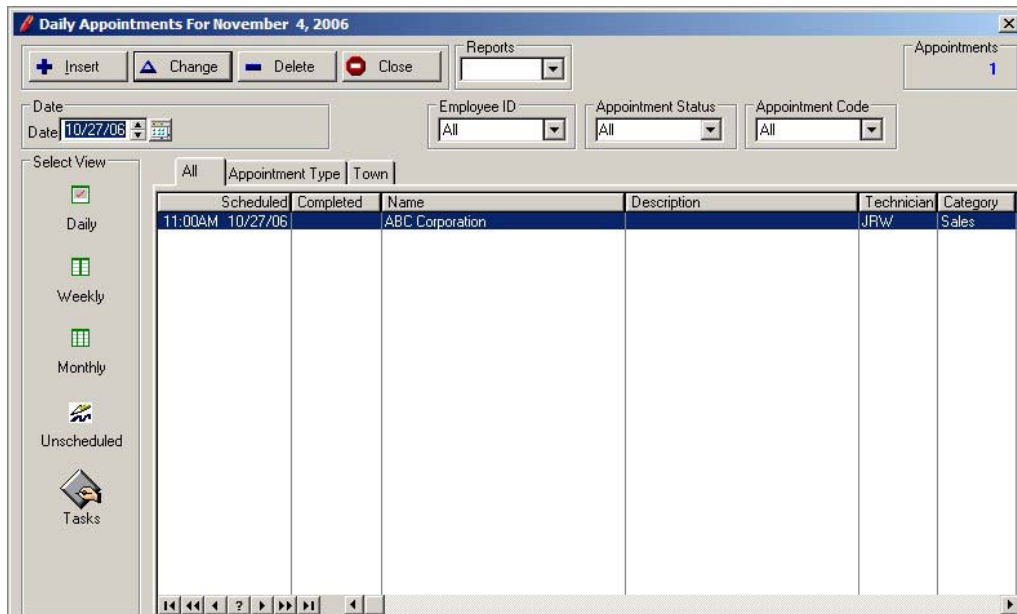
The Service Appointment Calendar feature allows the user to maintain and view a schedule of appointments in a multitude of viewpoints.

The appointment calendar is the master list of appointments that are setup from throughout the software. Appointments show on the calendar as a result of being created from within any of these areas of the software:

- Followup Call Log
- Manually Entered Appointments On The Calendar Directly

### Viewing Appointment Calendar

Once you select 'Appointments' button from the top taskbar, the main appointment screen will be displayed. It is similar in style to the popular Microsoft Outlook calendar.



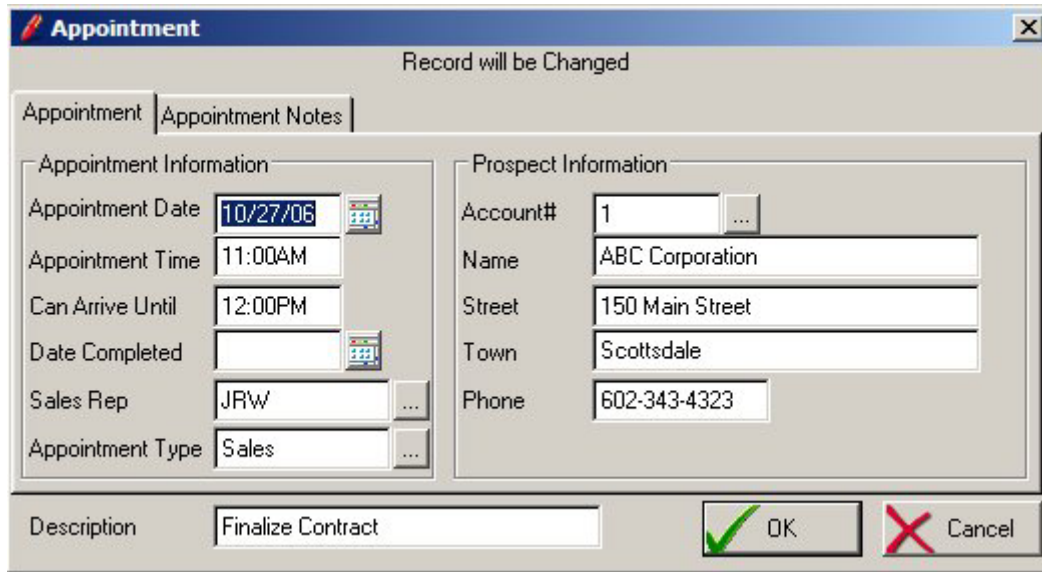
The top row of the calendar includes Insert/Change/Delete button as well as a Report Selection drop-down to print a Schedule Report or Batch Ticket Print.

The appointment list displayed may be sorted by All, Appointment Type, or Town. Click on the appropriate sort tab to immediately display that sort.



## Adding an Appointment

To add an appointment click on the INSERT button on the appointment calendar. This will display the Appointment Detail screen:



**Appointment** Record will be Changed

Appointment Appointment Notes

**Appointment Information**

Appointment Date 10/27/06

Appointment Time 11:00AM

Can Arrive Until 12:00PM

Date Completed

Sales Rep JRW

Appointment Type Sales

**Prospect Information**

Account# 1

Name ABC Corporation

Street 150 Main Street

Town Scottsdale

Phone 602-343-4323

Description Finalize Contract

OK Cancel

### Additional Notes Tab

If you need to write detailed notes about a particular appointment, click on the Appointment Additional Notes tab. This section may also be printed on the Appointment Calendar Printout.

### Appointment Date

Enter the date of the appointment in this field.

### Appointment Time

You can enter the scheduled time of appointment. If a time is entered, you may also select AM or PM.

### Arrive Until

If your appointment must be scheduled within a specific time of the day, enter the latest time this appointment is scheduled for, including AM or PM designation.

### Date Completed

Once a scheduled appointment has been completed, you may enter the date of completion in this field. This allows you to keep track of which appointments were done, and which ones are still open. The scheduled appointment list can print out schedules based upon open or closed status.

### SalesRep

Select the salesrep this appointment is assigned to.

<b>Appointment Type</b>	Enter an appointment type code. This code correctly categorizes the type of appointment being scheduled. Selecting the [...] button will display a list of valid appointment codes.
<b>Description</b>	You can enter a brief description of the type of appointment being scheduled. A more detailed description of this appointment may be entered in the Additional Notes Tab section of this appointment.
<b>Account #</b>	If the appointment is for a prospect on file, enter the prospects' account number in this field. If the account number is entered, the prospect name and town fields will automatically be filled in. You may leave this field blank if you do not know the prospects' account number, or if the appointment is for someone other than an existing prospect. Selecting the [...] button will display a list of prospect.
<b>Prospect Name</b>	Normally filled in if you entered a prospec account number in the previous field. You may enter a name if the appointment is not for a prospect.
<b>Prospect Street</b>	Normally filled in if you entered a prospect account number in the account number field, otherwise you may manually enter a street.
<b>Prospect Town</b>	Normally filled in if you entered a prospect account number previously, otherwise you can enter the town manually.
<b>Prospect Phone</b>	Normally filled in if you entered a prospect account number.

Select OK to save the appointment. You will be returned to the calendar view, and the appointment just entered will be notated in the # appointments displayed for that day.

## Appointment Selectors

The Appointments Counter in the upper-right corner shows the total number of appointments currently displayed for the date or date range – based upon the parameters selected below:

NOTE: You can setup security for a user so that these selectors are set to defaults when they log in and view the appointment calendar. See Security Administration Chapter for detailed information.

**Employee ID** The Employee ID drop-down selection displays a list of all employees that are currently on file within the Employee Profile section. To view the appointment schedule of all employees, select ALL as Employee ID. If you wish to view appointments for a specific employee only, click on the drop-down field and select the appropriate Employee ID from the list. The appointment list will immediately reflect the Employee ID selection.

**Appt Status** The Appointment Status drop-down selection allows the selection of appointments based upon the following Status:

All	Displays ALL appointments regardless of status
Open	Displays only appointments that do not have a completed date
Closed	Displays only appointments that have a completed date
Unscheduled	Displays only appointments that have no scheduled date

Select an appropriate status from this drop-down list. The appointment list will immediately reflect the Appointment Code selected.

**Appt Code** The Appointment Code drop-down selection displays a list of all appointment codes that has been previously setup. These are user-defined values that are used to assign a code to each appointment. Select ALL to show all appointments regardless of their code, or click on the drop-down field and select an appropriate Appointment Code from the list. The appointment list will immediately reflect the Appointment Code selected.

## Appointment Views

The main panel on the left side is the Select View Panel:

NOTE: Some selectors are not valid on specific views and therefore will not be displayed in that view.

### Daily

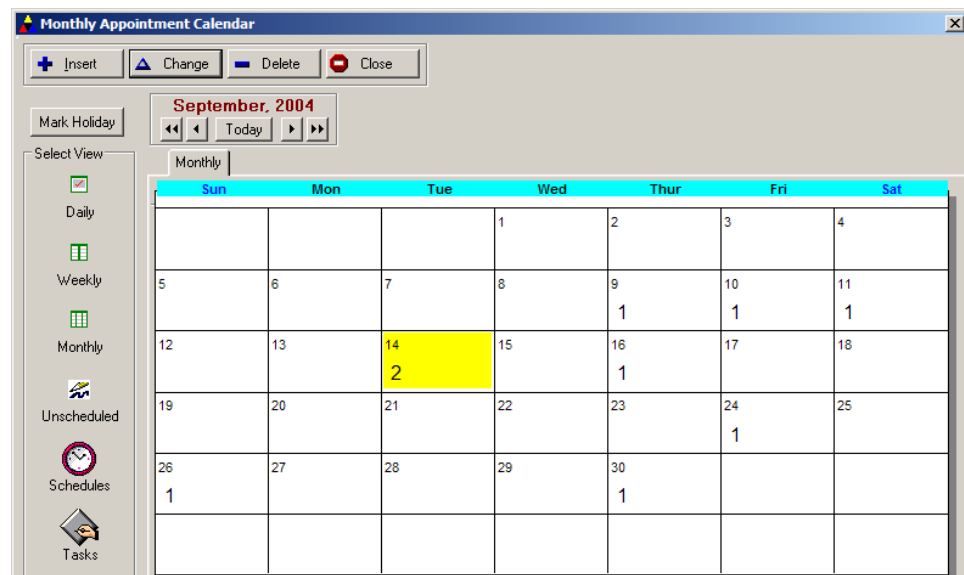
Clicking on the Daily button displays appointments for a specific date (defaults to current date). Click on the [...] lookup button to change date. Double-click on a listed appointment to bring up the Appointment Detail screen for details of that appointment. Click on INSERT to add a new appointment, or click on DELETE to delete an existing appointment.

### Weekly

Clicking on the Weekly button displays appointments for a one week (7 days) time period initially, defaulting with the current date as the starting date. To change the starting date, click on the up/down arrow next to the date or click on the [...] lookup button to change the date from a popup calendar. As you change the starting date, the end date automatically retains a 7 day span. If you wish to display a different date span than 7 days, first select the Start Date, and then click on the up/down arrow or [...] popup calendar on the End date field to select a different ending date. Double-click on the Appointment Detail screen for details of that appointment. Click on INSERT to add a new appointment, or click on DELETE to delete an existing appointment.

### Monthly

To view a monthly calendar, click on the Monthly button. This will display a typical monthly view of a calendar, with the inclusion of the number of appointments listed in each day box. Double-click on a specific date within this Monthly view to go to the Daily View showing a list of appointments for that specific date.



To navigate to other months or years on the monthly calendar, click on the left or right arrows displayed next to the date

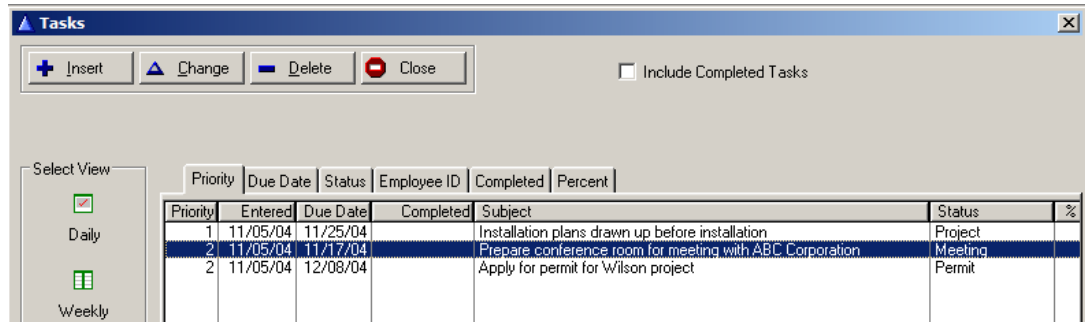
field above the monthly calendar. Single arrows change by month, double-arrows change by year.

### Unscheduled

To display a list of all appointments that are not scheduled, click on the Unscheduled Button. This includes all appointments that do not have a scheduled date filled in, or an appointment that does not have an actual date associated with it.

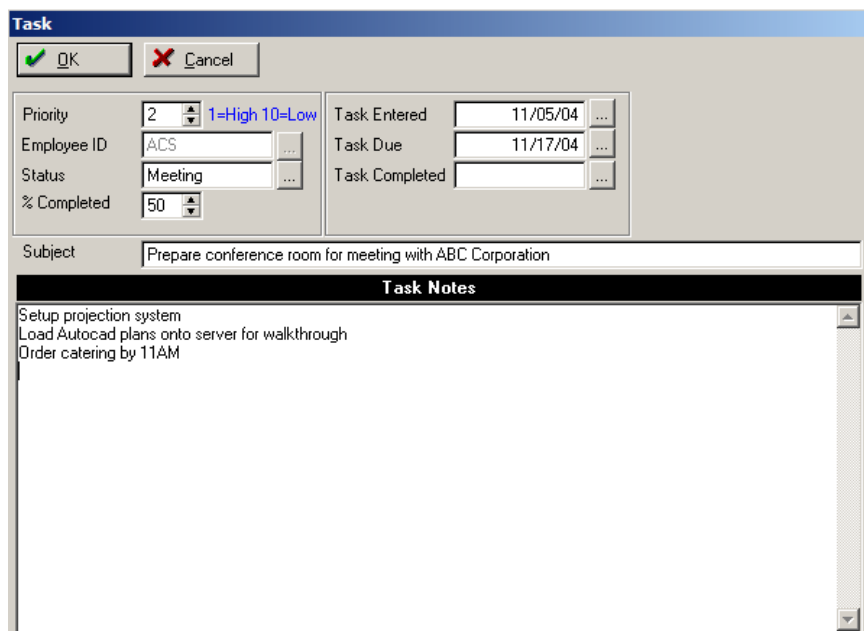
### Tasks

The Task screen shows a list of all tasks that have been entered.



The tasks may be sorted by Priority, Due Date, Status (user-definable), Employee ID, Completed Indicator, and Percent Completed.

To insert a new task, click on the INSERT button. The Task screen will appear:



**Priority** Prioritizes this task (1=Highest Priority / 4= Lowest Priority). Task list can be sorted based upon Priority

<b>Employee ID</b>	ID of employee this task is assigned to. Authorized users may assign tasks to any employee listed in the Employee Profile section of the software. Non-Authorized users (as determined in the Security Administration Profile for this user) may only assign tasks to themselves. Task list may be sorted by Employee ID.
<b>Status</b>	A validated field (user-defined values) that determines the type of task. Task list may be sorted by Status.
<b>% Completed</b>	A percentage from 0 to 100 determining the completion stage of this task as of this moment. Task list may be sorted by Completed %
<b>Task Entered</b>	Date Task was entered into system
<b>Task Due</b>	Date task is due for completion. Task list may be sorted by due date
<b>Completed</b>	Date task was completed (task is considered completed when a date is entered into this field and will no longer show on open task list unless a checkmark is placed in the 'Include Completed Task' checkbox of the task list screen or clicking on the Completed Sort Tab on the task list screen.
<b>Subject</b>	Enter a summary description of this task
<b>Task Notes</b>	Description of task

## REPORTS Selector

### Printing Appointment Schedules (SCHEDULE Selection)

Selecting the SCHEDULE selection from the Report Selector activates this function. You can display or print out a listing of appointments scheduled for any date range by pressing the F10 key from the appointment calendar. After selecting this button, you will be asked the following questions:

<b>Start Date</b>	Enter the beginning scheduled date of appointments that are to be printed on the list.
<b>End Date</b>	Enter the last scheduled date of appointments that are to be printed on the list.
<b>Appt Status</b>	Since appointments can be marked as completed, you have the option of printing out just appointments that are still open, appointments that have been completed, or all appointments, regardless of status.

**Salesrep** If you wish to print out a list of appointments assigned to a specific technician, enter the technicians' name in this field, otherwise leave blank.

**Town** If you wish to print out a list of appointments for customers located in a specific town (for routing purposes), enter the name of the town in this field, otherwise leave blank.

**Send Report To** You may send this report to the screen for immediate viewing or to your printer.

Once you have answered the above prompts, the appointment schedule list will print out.

## Chapter 7: Mail Merge Facility

The mail merge facility can help improve communications with your prospects. You may create letters or postcards for various occasions (follow-up on previous sales call, 'thank you' for new business, promotional marketing, special sale announcements, etc.). The mail merge will automatically insert each prospect's name and address into a predetermined location on the letters and postcards. You may create as many different letters or postcards as necessary and they will always be available through the letter or postcard list. If your needs go beyond these letters or postcards, you also have the option of exporting the mail merge list to a DBASEIV file. You may also produce mailing labels, export email addresses to an email file, or export fax numbers to a fax number file (for use with efax.com service).

To perform a mail merge, select 'MAIL MERGE' from the top menu.

**Inquiry / Mail Merge Print**

Select which group of prospects are to be used during the Inquiry/Mail Merge.  
Only fill in fields that are pertinent to the selection of these prospects.

Document Type:  Document Name:

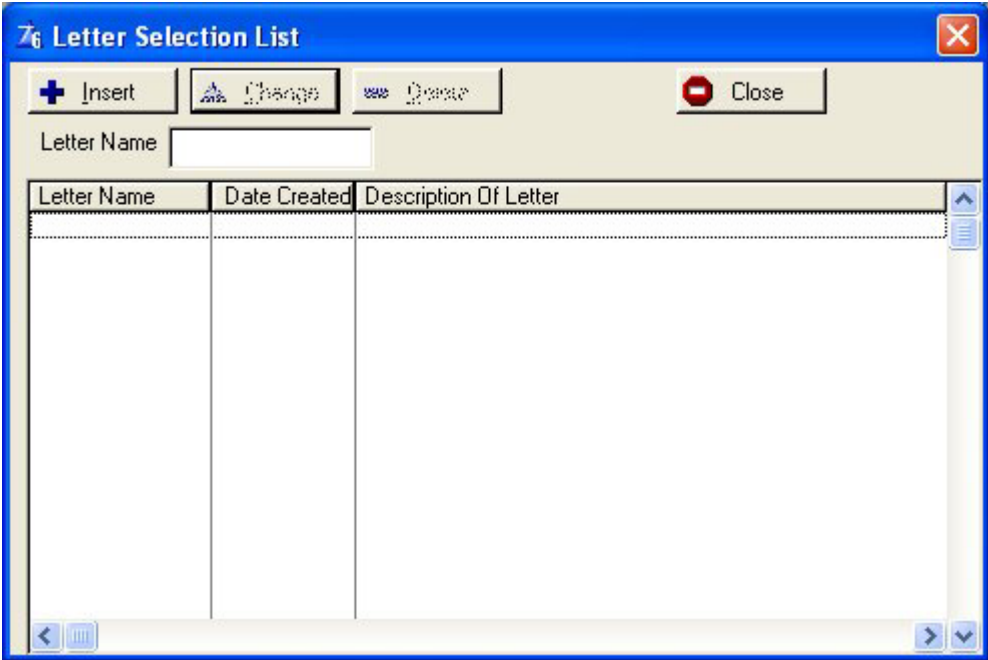
Sort By:  Lower Case:

Prospect Search | Proposal Search | Prospect Custom Fields | Proposal Custom Fields

Selection Ranges	From	To	Specific Selections
Prospect Name	<input type="text"/>	<input type="text"/>	County: <input type="text"/>
Prospect Number	<input type="text"/>	<input type="text"/>	Source Of Lead: <input type="text"/>
Zip Code Range	<input type="text"/>	<input type="text"/>	Industry: <input type="text"/>
First Contact Date	<input type="text"/>	<input type="text"/>	Account Status: <input type="text"/>
Purchase Date	<input type="text"/>	<input type="text"/>	Property Type: <input type="text"/>
Date Of Last Call	<input type="text"/>	<input type="text"/>	Sales Rep: <input type="text"/>
Date Of Last Mail	<input type="text"/>	<input type="text"/>	
No Call Since	<input type="text"/>		
No Mail Since	<input type="text"/>		



### Create / Modify a Letter

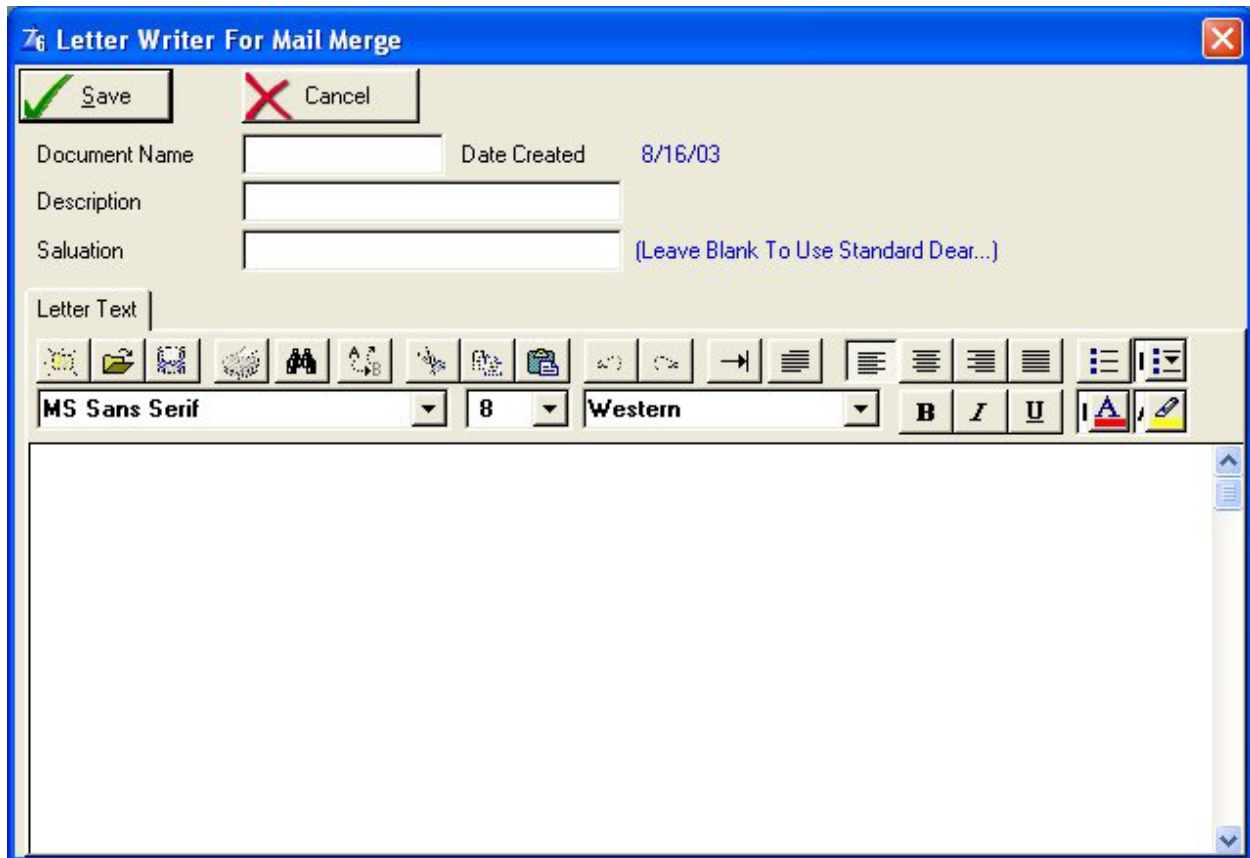


Letters may be created under the 'Create Letter' menu selection. A list of letters already created by you will appear. You may add a new letter by pressing Insert from this list. If you want to review or modify an existing letter, highlight the letter and press ENTER.

The letter writer in Pursuit supports the RTF format. Please review the 'RTF Controls' section of the 'Using Pursuit' Chapter to familiarize yourself with the RTF formatting controls.

Once the body of the letter has been created in this section, the Mail Merge filter screen allows you to select groups of customers that will have a letter created – merged with their name and address automatically by Pursuit.

## Adding A New Letter

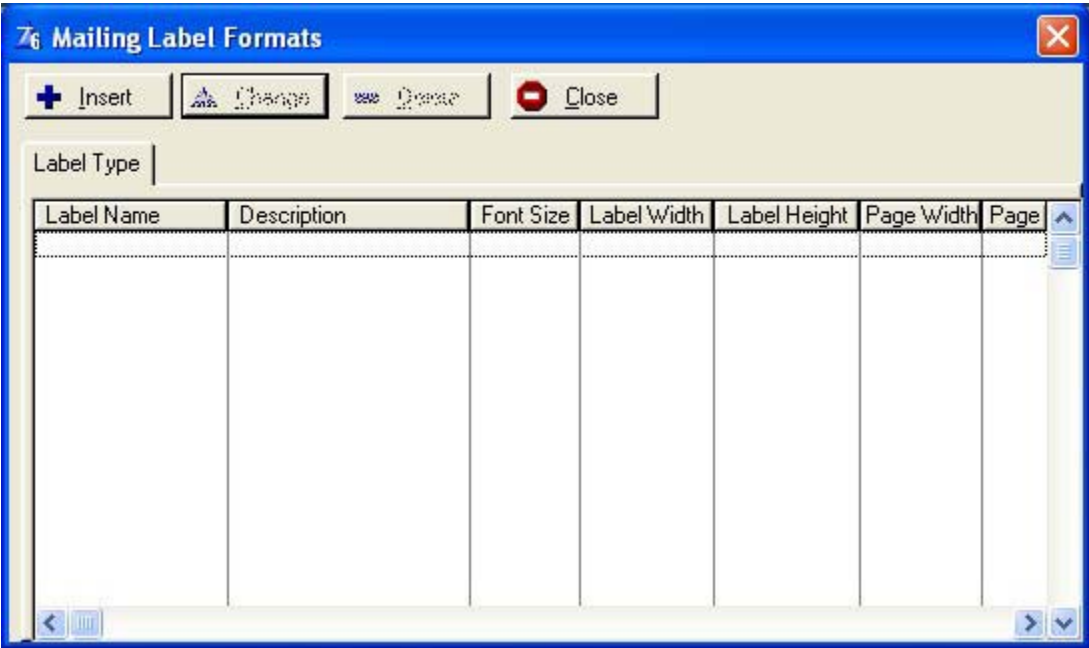


Each letter must be given a unique name. Add a description for your new letter. You may also enter your own salutation to appear on the letters, or if left blank the salutation will default to DEAR... (the contact name is automatically inserted after the word DEAR).

You may then create the body of the letter. The RTF controls are used to format your letter, including typeface, font size, color, attributes, bullets, and margins.

When you are finished creating or modifying the letter, select OK to save the letter. This will return you back to the letter list. Select Cancel to return back to the Mail Merge Menu.

# Create / Modify A Mailing Label



Labels may be created under the 'Create Mailing Labels Format' menu selection. Press Insert to add a mailing label, Delete to delete a mailing label, or ENTER on a highlighted selection to review or modify an existing mailing label. Each label requires a unique name to identify it.

## Adding A New Mailing Label Format

**Adding a LABELS Record**

Adding a LABELS Record  
All measurements are in inches.

Label Format Name

Description

Page Width  Page Height

Label Width  Label Height

Top Margin  Left Margin

Print Contact Name  Font Size

Print Mode

You can easily setup an unlimited number of mailing label and envelope formats that will be used by the Mail Merge utility to send correspondences to your customers. Each label can be defined with it's own name, and you can specify the left and top margins, as well as the size of the label on the sheet. All size dimensions are entered in inches (8.5, 2.75, etc.).

**Label Name/Description** Enter a unique name and a description for this label (Ex: Avery 5160)

**Page Width/Height** Enter the size of the label sheet (usually width=8.5, height=11.00)

**Label Width/Height** Enter the size of width and height of one of the labels on the page.

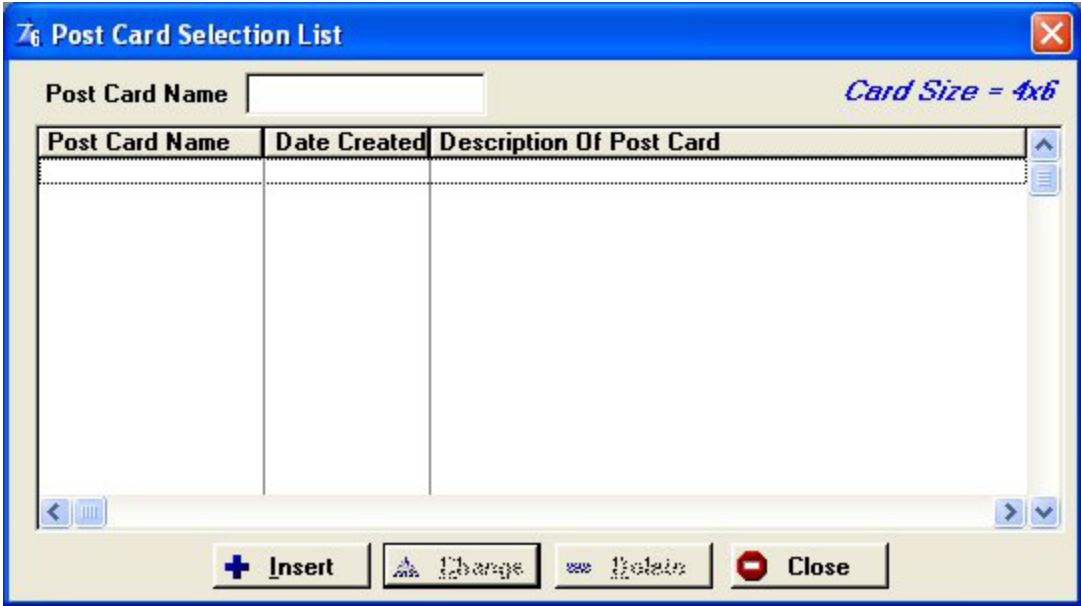
**Top Margin/Left Margin** Enter the measurement (inches) where the top label is offset from the top of page and from the left side of the page (usually .25).

**Print Contact Name** Select YES to print the customer 'Contact' name field (prints above company name). Select NO to print only Company Name and address, no contact field.

**Font Size** Usually set to 10, 11, or 12, this is the point size of the font. If you set too high a number on a small label, information may be cut-off at end.

**Print Mode** Usually set to Portrait for labels, and Landscape for envelopes.

### Create / Modify a Post Card



Post cards may be created under the 'Post Card Format' menu selection. Press Insert to add a new post card, Delete to delete a post card, or ENTER on a highlighted selection to review or modify an existing post card. Each postcard requires a unique name to identify it.

Although post cards are not generally used very much in this day of laser and inkjet printers, Pursuit still has the ability to print postcards (4 x 6) if you wish to use this format to send correspondences to your prospects.

## Adding A New Post Card Format

Post Card For Mail Merge

Post Card Name  Description:

Place Stamp Here

Addressed To:  
Prospect Name.....  
Prospect Street Address...  
Prospect Town, State, Zip.....

Message To Appear On Front Of Post Card

OK Cancel

On the post card screen you may enter the name and description of the postcard and a message that will appear on the bottom of the card. The prospects' name and address will be automatically printed in the middle section, and you may optionally print your return name and address if desired.

## Print Mail Merge Documents

Once you have created letters or postcards or setup mailing label formats, you can merge customer name and address onto these documents by selecting 'Print Mail Merge' from the Mail Merge menu. You will be prompted for the following:

### Document Type

Select what type of document you want to use for this mail merge. You may select postcard, letter, mailing labels (3 1/2" x 15/16" size labels are supported - one across), list (a prospect list used for your purposes to be displayed or printed), or export out to the DBASEIV file format. If you select to export, a screen will appear explaining the exact file format so that you may easily import this file into your word processing program.

### Document Name

If you selected letter, postcard or mailing label a list of the selected document type will appear. Select the appropriate document to be used.

### Sort By

You may sort the mail merge by either prospect name or zip code. This sort relates to all document types, including mailing labels and file export selections.

## Lower Case

If you entered most of your prospect name and address information on the prospect maintenance screen in all upper case characters, it is incorrect to print this information in upper case characters when the body of the letter is in upper and lower case. If you would like only the first letter of each prospect name and address to appear in upper case and all other characters converted to lower case then select 'YES', otherwise select 'NO' to keep all characters in upper case.

The Mail Merge Print section contains two tab screens - General Fields and User Defined Fields:

## Prospect Search Tab

Selection Ranges	From	To	Specific Selections
Prospect Name			County
Prospect Number			Source Of Lead
Zip Code Range			Industry
First Contact Date			Account Status
Purchase Date			Property Type
Date Of Last Call			Sales Rep
Date Of Last Mail			
No Call Since			
No Mail Since			

The General Fields Tab consists of fields found on the main prospect maintenance screen. The SELECTION RANGES section allows you to enter a range of values to determine which prospects are eligible to receive this mail merge. This section allows you to select prospects in almost unlimited variations. Leave blank any fields which are not going to be used to determine which prospects will be selected. You may mix and match as many conditions as needed in order to identify the correct group of prospects. The following is a description of the various selection ranges that can be used:



<b>Prospect Name</b>	Allows you to select prospects within an alphabetical name range.
<b>Prospect Number</b>	Allows you to select prospects within a a range of account.
<b>Zip Code Range</b>	Selects prospects that live within the specified zip code range. Useful to do mailings to just certain geographic locations.
<b>First Contact Date</b>	Selects prospects based upon the date they were entered into Pursuit
<b>Purchase Date</b>	Selects prospects that have purchased from you within the entered date range.
<b>Date Of Last Call</b>	Scans the call notes of each prospect and selects those prospects that have a call note within the entered date range.
<b>Date Of Last Mail</b>	Selects only those prospects that have had a mailing creating within the mail merge section within the date range entered.
<b>No Call Since</b>	A very useful selection which provides a selection of prospects that you have not called within the entered date range.
<b>No Call Since</b>	A very useful selection which provides a selection of prospects that you have not mailed within the entered date range.

The SPECIFIC SELECTIONS section allows you to select prospects based upon a match of values entered into any of the displayed fields. In most of these fields, clicking on the down arrow to the right of the field will display the valid values for that selection.

<b>County Name</b>	Selects customers that live in a specific county.
<b>Source Of Lead</b>	Select prospects based upon their lead source.
<b>Industry</b>	Select prospects based upon their industry/profession.
<b>Account Status</b>	Select prospects based upon their current account status (Prospect, Customer, Other).
<b>Property Type</b>	Select prospects based upon their property classification (Residential, Commercial, Other).
<b>Disposition</b>	Select prospects based upon their current proposal disposition (Open, Won, Lost, Other).
<b>Sales Rep</b>	Select prospects assigned to a specific sales rep.

## Proposal Search

- Proposal Number**                      Proposal Number range.
- Proposal Date**                        Proposal 'Created' Date Range
- Job Starting Date**                    Proposal Starting Date Range
- Proposed Part ID**                    Select proposals based upon Part ID listed on proposal
- Probability Level**                    Select proposals based upon probability level
- Job Status**                            Select proposals based upon current job status
- Building Type**                        Select proposals based upon building type code
- Disposition**                          Select proposals based upon Win/Lose disposition
- Disposition Reason**                Select proposals based upon reason for Win/Lose
- Purchase Terms**                      Select proposals based upon purchase terms (own/lease)
- Sales Rep**                             Select proposals based upon Sales Rep ID
- Recurring Charge**                    Select proposals based upon recurring charge on proposal

## Prospect Custom Fields Search

Fields that are designated as 'User-Definable' in the main prospect maintenance screen are available in this mail merge area as selections. One special feature of the user-definable fields is the ability to select prospects based upon the presence or absence of information in the first eight user-definable fields. To use this feature, enter a \* in any user-definable field if you wish only prospects with information in those fields to be selected. Enter a # in any user-definable field if you wish to select only prospects that do not have any information in those fields.

### Option Fields 1 - 8

These fields are free-form fields that contain no specific validations and may contain any type of data (up to 20 characters long). You may search based upon a particular value in any of these fields, or enter a \* in a specific field to find all prospects that have any value in that field, or you may enter a # in a specific field to find all prospects that DO NOT have any value in that field.

### Option Fields 9-12

These fields are formatted for dates and therefore can be used in the mail merge section to select prospects that have a particular date range within any of these fields.

**Option Fields 13-16**

These fields are validated fields (by the user) and prospects may be selected based upon a valid value for that field.

Remember, you can mix conditions. If a selection is not being used, do not enter a value in that field.

Once you have entered your criteria on either tab section, select OK to start. Pursuit will automatically tally the number of prospects that match your criteria and allow you to continue with the mail merge or return back to the mail merge menu. This allows you to play 'what-if' to see how many prospects would be sent a letter based upon your selections. You may also use this section to simply print out a list of prospects based upon your criteria (the prospect list on the report facility also allows you to do this, however not as fully as the mail merge).

When printing the Mail Merge, you have the option of printing your return address on letters and post cards. In addition, you may perform a test print to make sure the paper is lined up correctly in your printer. If you are printing a letter, you may select an 'Offset' if you are using your own letterhead paper. This allows you to adjust how many lines down from the top of page before printing begins in order to accommodate the size of your letterhead.

If you are printing labels, you may select the number of copies to print. This allows you to print multiple labels for the same name and addresses (you may select up to 999 copies).

## Proposal Custom Fields Search

Fields that are designated as 'User-Definable' in the main proposal maintenance screen are available in this mail merge area as selections. One special feature of the user-definable fields is the ability to select proposals based upon the presence or absence of information in the first eight user-definable fields. To use this feature, enter a \* in any user-definable field if you wish only proposals with information in those fields to be selected. Enter a # in any user-definable field if you wish to select only proposals that do not have any information in those fields.

### Option Fields 1 - 8

These fields are free-form fields that contain no specific validations and may contain any type of data (up to 20 characters long). You may search based upon a particular value in any of these fields, or enter a \* in a specific field to find all proposals that have any value in that field, or you may enter a # in a specific field to find all proposals that DO NOT have any value in that field.

### Option Fields 9-12

These fields are formatted for dates and therefore can be used in the mail merge section to select proposals that have a particular date range within any of these fields.

### Option Fields 13-16

These fields are validated fields (by the user) and proposals may be selected based upon a valid value for that field.

Remember, you can mix conditions. If a selection is not being used, do not enter a value in that field.

Once you have entered your criteria on either tab section, select OK to start. Pursuit will automatically tally the number of prospects that match your criteria and allow you to continue with the mail merge or return back to the mail merge menu. This allows you to play 'what-if' to see how many prospects would be sent a letter based upon your selections. You may also use this section to simply print out a list of prospects based upon your criteria (the prospect list on the report facility also allows you to do this, however not as fully as the mail merge).

When printing the Mail Merge, you have the option of printing your return address on letters and post cards. In addition, you may perform a test print to make sure the paper is lined up correctly in your printer. If you are printing a letter, you may select an 'Offset' if you are using your own letterhead paper. This allows you to adjust how many lines down from the top of page before printing begins in order to accommodate the size of your letterhead.

If you are printing labels, you may select the number of copies to print. This allows you to print multiple labels for the same name and addresses (you may select up to 999 copies).

### ***Display Merge Selection List Button***

If you choose the LIST document type on the print mail merge screen and choose to display this list, a prospect list will be displayed (similar to the list that appears in the Prospect Maintenance section). This list may be scrolled up or down by pressing the cursor keys or pressing the Page Up or Page Down keys. You may also scroll immediately to the bottom of the list by pressing the CTRL-Page Down keys.

The Prospect Merge list is very useful to call prospects for follow-up sales calls and reschedule appointments, or any other use that you may using the mail merge section for.

You may review information about each prospect by pressing the ENTER key while that prospect is highlighted on the list. The Prospect Review screen will then appear (this screen is similar to the Main Prospect Maintenance Screen). Select the Cancel button to return back to the Prospect Merge List.

## Chapter 8: Report Facility

This chapter explains the various reports which are available within Pursuit. All reports will be accessed from this section.

### ***General Information About Reports***

Almost all reports may be displayed to the screen or printed to your printer. If a report is displayed to the screen, you may scroll the report to the left and right, as well as up or down. If a report is displayed to the screen, you have the following functions to choose from (some functions may not be available depending upon the size of the report):

<b>Cancel</b>	Exits out of the report display screen.
<b>Zoom Out</b>	Displays the report in a 'full page' view. This view is usually difficult to read except for the purposes of seeing the format of the report and generally would not be used.
<b>Previous Page</b>	If the report is more than 1 page long, you may page forwards and backwards by selecting the Previous Page and Next Page menu items.
<b>Next Page</b>	If the report is more than 1 page long, you may page forwards or backwards by selecting the Previous Page and Next Page menu items.
<b>Jump</b>	If the report is more than 1 page long, you can enter an exact page number and immediately 'jump' to that page. Useful for long reports.
<b>Facing Pages</b>	If the report is more than 1 page long, you can look at 2 pages next to each other. This function is rarely used unless you wish to see the format of the report (details will not show well in this view).

There are a few other points to keep in mind when printing reports:

- 1] Most reports have additional specific selections that help define the type of information to be reported on. This offers you a great deal of flexibility in providing reports based upon your specific requirements. These selections are chosen by selecting the down-arrow button and choosing from the listed options.

Selecting a field to sort by will result in the report to be printed in ascending order based upon the field selected.

If a specific report criteria is selected, you will be asked to enter the value to search for in that field. Select OK to start generating the report. When the report is printed, it will only print for those records whose selected field equals the value you have just entered (Ex: County Name = Nassau, only those prospects within that county name

will be printed).

- 2] Before you select a report to print, make sure you have paper in your printer and the printer is online. If you are not sure how to do this, consult your printer manual. Most reports print on blank paper.
- 3] Some reports take longer to process than others. This is due to calculations that some reports must perform. It is not unusual for certain reports to take 10 minutes or longer before printing out. It is recommended that where possible, these reports should be selected at the end of the day when access to Pursuit is not critical.
- 4] If a report has been requested but you are returned to the Report Menu without any printout, this indicates that no information was found to report on.
- 5] If you wish to return to the report menu after you have entered any report screen, select the Cancel button. You may do this at any time up until the report is being printed. Once the report has started printing, if you need to cancel the printing it is best to first turn the printer off-line, then go into the Windows Print Manager and delete any print items still queued (press the DELETE button while highlighting the report being printed).
- 6] You may choose any valid printer to print a report to by choosing the **PRINT SETUP** button found on all print screens found throughout Pursuit. Pursuit will work with any printer installed in your Windows Control Panel (printer driver) section. In addition, any additional printer drivers such as a faxboard driver can be utilized (this allow reports, proposals, and purchasing lists to be faxed directly from within the Pursuit program).



## Report Facility Menu



To display the Report Facility menu, select **REPORTS** from the top Menu.

### Prospect List

A screenshot of the 'Prospect List Report' dialog box. The dialog has a title bar 'Prospect List Report'. It contains several settings: 'Send Report To' is set to 'Printer'; 'Print Contacts List', 'Print Comment Section', 'Print Follow-Up History', 'Print Demographics', and 'Print User-Defined Fields' are all set to 'YES'; 'Account Status' is set to 'All'; 'No Contact Since' is an empty text field with '(Optional)' next to it; 'One Page Per Prospect' is set to 'YES'; 'Select Sort Field' is set to 'Prospect Name'; 'Select Report Filter' is set to 'All'; and 'Report Filter Value' is an empty text field. On the right side, there are three buttons: 'Print', 'Cancel', and 'Printer Setup'.

This report will give you a 'birds-eye-view' of all of the prospects in the system.

Information displayed on this report include prospect name, address, phone and currently selling stage.

The report may be sorted by one of the following fields: Prospect Name, Zip Code

Using the cursor keys, select one of the above sorts and press ENTER. You will then have the choice of selecting what type of prospects are to be printed: All, Specific County, Specific Selling Stage, Specific Lead Source, Specific Industry.

## Proposal Report

**Proposal Report**

Send Report To: Printer

Print Proposal Details: YES

Print User-Defined Fields: YES

Specific Sales Rep:

Probability Level: Low

Purchase Terms: Own

Proposal Disposition: Open

Select Sort Field: Proposal Number

Select Report Filter: All

Report Filter Value:

Print

Cancel

Printer Setup

The prospect report will produce a list of proposals based upon the various criteria selectable on this screen. You may print a list of proposals along with detail items and User-defined fields. Other selection criteria include probability level, purchase terms and specific sales rep ID.

## Job Cost Report



The screenshot shows a dialog box titled "Job Cost Report". It contains several input fields and buttons. On the left, there are five rows of controls: "Send Report To" with a dropdown menu showing "Printer"; "Proposals Dated From" with two empty text boxes and the word "Until" between them; "Proposal Disposition" with a dropdown menu showing "All"; "Select Sort Field" with a dropdown menu showing "Part"; and "Select Report Filter" with a dropdown menu showing "All". Below these is a "Report Filter Value" label followed by an empty text box. On the right side, there are three buttons: "Print", "Cancel", and "Printer Setup".

This report will calculate your profit margins for each proposed job. Included on this report includes a listing of all parts proposed for a job, their costs, your net profit and profit margin. You will be asked to enter a work order number, or you may enter a date range to include all proposals created within those dates.

## Sales Rep Performance Report



The screenshot shows a dialog box titled "SalesRep Performance Analysis Report". It contains several input fields and buttons. On the left, there are four rows of controls: "Send Report To" with a dropdown menu showing "Printer"; "New Prospects From" with two empty text boxes and the word "Until" between them; "Select Sort Field" with a dropdown menu showing "Sales Rep"; and "Select Report Filter" with a dropdown menu showing "All". Below these is a "Report Filter Value" label followed by an empty text box. On the right side, there are three buttons: "Print", "Cancel", and "Printer Setup".

Whether you have one sales person or a large sales force, this report will reflect the results of their sales efforts. Each sales rep is evaluated by the number of prospects assigned, the number of sales made, the closing rate, as well as the total time and expense spent on follow-ups. The report will be sorted by salesrep name and you have the choice of printing the report for all salesreps or just a particular sales rep.

## Time And Expense Report

The screenshot shows a dialog box titled "Time And Expense Report". It contains the following fields and controls:

- Send Report To:** A dropdown menu with "Printer" selected.
- For Period:** Two text input fields separated by the word "Until".
- Account Status:** A dropdown menu with "All" selected.
- Select Sort Field:** A dropdown menu with "Call Date" selected.
- Select Report Filter:** A dropdown menu with "All" selected.
- Report Filter Value:** A large text input field.
- Buttons:** "Print", "Cancel", and "Printer Setup" are located on the right side of the dialog.

This report will allow you to get a handle on the time and expense spent on various types of follow-up activities. You may select a follow-up date period to evaluate. The report will be sorted in order of the follow-up date and you may choose to report on all follow-ups during this period, for a specific rep, for a specific call type (visit, lunch, etc.), or for a specific prospect.


## Sales Lead Analysis Report

The screenshot shows a dialog box titled "Sales Lead Analysis". It contains the following fields and controls:

- Send Report To:** A dropdown menu with "Printer" selected.
- New Prospects From:** Two text input fields separated by the word "Until".
- Select Sort Field:** A dropdown menu with "Sales Lead" selected.
- Select Report Filter:** A dropdown menu with "All" selected.
- Report Filter Value:** A large text input field.
- Buttons:** "Print", "Cancel", and "Printer Setup" are located on the right side of the dialog.

This report shows you the effectiveness of your various sources for sales leads. For each lead source, the total number of responses, total number of prospects, total purchased, purchase %, and average closing times are printed. The report will be sorted by source of sales lead, and you may choose to report on all sales leads, a specific sales lead, a specific sales rep, or a specific industry.

## Inventory Report



The screenshot shows a dialog box titled "Inventory Report". It contains the following fields and controls:

- Send Report To:** A dropdown menu with "Printer" selected.
- Part Category:** A dropdown menu with "All" selected.
- Select Sort Field:** A dropdown menu with "Part ID" selected.
- Select Report Filter:** A dropdown menu with "All" selected.
- Report Filter Value:** An empty text input field.
- Buttons:** "Print", "Cancel", and "Printer Setup" are located on the right side of the dialog.

The Inventory Report will provide a listing of items currently in your Inventory file. Although Alarm and Service Express billing programs are designed for inventory control and therefore provide more detailed inventory reporting capabilities, Pursuit does have the ability to print a listing of inventory items.

## Proposal Disposition Report



The screenshot shows a dialog box titled "Proposal Disposition Report". It contains the following fields and controls:

- Send Report To:** A dropdown menu with "Printer" selected.
- Proposals Dated From:** A date input field followed by the word "Until" and another date input field.
- Select Sort Field:** A dropdown menu with "Reason" selected.
- Select Report Filter:** A dropdown menu with "All" selected.
- Report Filter Value:** An empty text input field.
- Buttons:** "Print", "Cancel", and "Printer Setup" are located on the right side of the dialog.

It is beneficial to understand the reasons why you lose jobs as well as why you win them. This report will help identify the major reasons for these wins and losses. The disposition field and reason for disposition (win or lose) is found on the proposal main screen. Each job that has been won or lost will be searched in this report based upon the various reasons on your reason validation list. The report will then show the number of jobs won/lost for each reason (price, quality, etc.).

## Purchasing List Report

The screenshot shows a dialog box titled "Purchasing List" with a blue header. The dialog contains several configuration options:

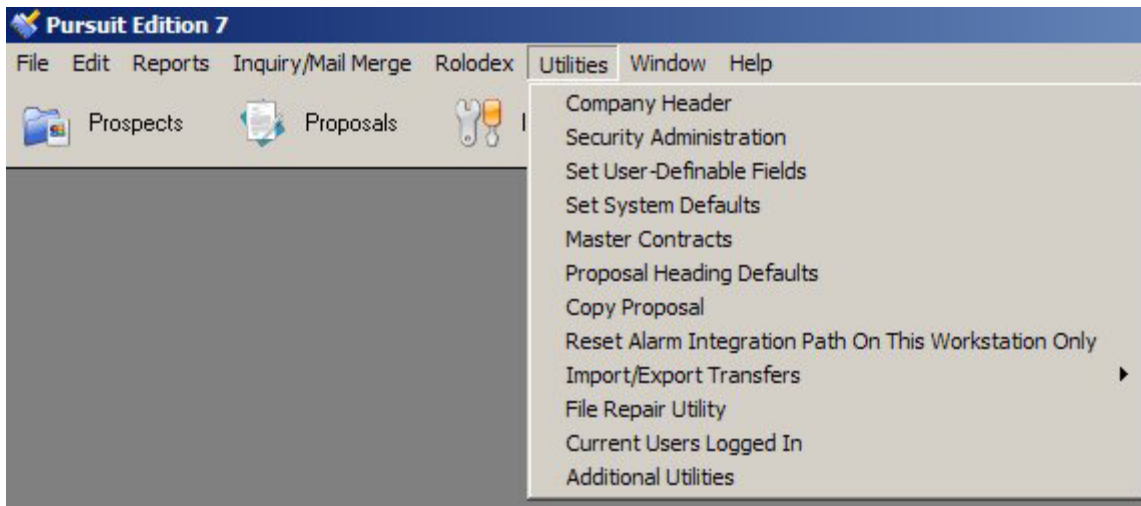
- Send Report To:** A dropdown menu with "Printer" selected.
- Vendor Name:** A dropdown menu with "All" selected.
- Selected Proposals:** A grid of four empty text boxes, each with a small "..." button to its right.
- Select Sort Field:** A dropdown menu with "Part Number" selected.
- Select Report Filter:** A dropdown menu with "All" selected.
- Report Filter Value:** An empty text input field.

On the right side of the dialog, there are three buttons: "Print", "Cancel", and "Printer Setup".

This report is designed to be a 'shopping list' that you would take with you to a distributor where you purchase your items. This report has a checkbox that can be checked off as each item is picked up. You may print this report for up to 8 proposal jobs and it will total the quantity of each item between those jobs and show the distributor price total for each part.

## Chapter 9: Utilities

The Utilities selection of Pursuit allows you to perform various functions which are not considered part of the normal day-to-day operation of the PURSUIT Database. Included in this section is the ability to import/export data to the ALARM or Service Express billing systems, setup default values for user-definable fields and proposal heading text, and setup the company header section.



**NOTE:** Backups and Restores are performed from the Pursuit Program Group window outside of the Pursuit program, and should be performed preferably on a daily basis or at least on a weekly basis. It is **HIGHLY** recommended you perform backups as frequently as possible – not just for Pursuit but for all of your business computers.

Most of the following utilities have been covered in detail in the 'Setup Wizard' Chapter in the beginning of this documentation and we recommend that you review the Setup Wizard to make sure you have Pursuit setup appropriately for your company. Those sections already covered in the Setup Wizard chapter will be described briefly below. Other Utilities not included in the Setup Wizard section will be described in detail in this section.

## Set Company Header

(Detailed In Setup Wizard Chapter)

**76 Company Name & Address Setup** Record will be Changed

**Company Information**

Company: All American Security, Inc.  
Street: 498 Main Street  
Street 2:  
City: Anytown  
State: AZ Zip Code: 85323  
Phone 1: 800-555-4982  
Phone 2:  
Fax: 800-555-8712  
License: 50124-B

**Pursuit Setup Options**

Print Letterhead On Proposals: Yes  
Proposal Print Style: Modern  
Print Part Locations: Yes  
Print Part Category: Yes  
Print Part Numbers: Yes  
Display Privacy Screen: No  
Unique Branch/Salesrep Code: 1  
Activate Password Protection: No  
Integrate With Alarm or Express: Yes

**Proposal Footer Options**

Website URL: http://www.z-microtech.com Print Footer: Yes  
Email Address: support@z-microtech.com Department: Support  
Email Address: sales@z-microtech.com Department: Sales

**Wallpaper Options**  
Optionally set your own company logo or graphic image to be used as Pursuit wallpaper

Wallpaper Background: C:\PFW\2003D\PFWB\BACK2.GIF  
Wallpaper Positioning: Tile

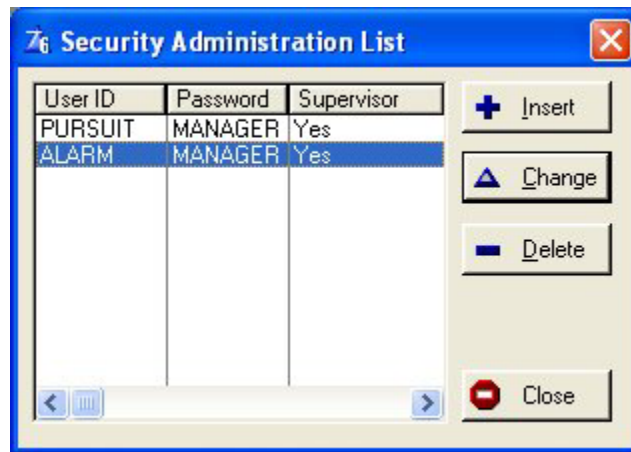
OK Cancel

When you first install the PURSUIT system, you will enter your company's name, address and telephone number. In addition, the system needs to know the type of proposals you will be using, as well as several options on printing the proposal.



## Security Administration

(Detailed In Setup Wizard Chapter)



Setting up security profiles for each of the Pursuit users is extremely important and highly recommended. Each user of Pursuit should have their own User ID and Password, along with the appropriate access rights.

## Set User-Definable Fields – Prospects Tab

(Detailed In Setup Wizard Chapter)

**User Definable Fields Setup**

Prospect Screen Definable Fields | Proposal Screen Definable Fields

This area determines the description that will appear for each user-definable field in the prospect custom field screen

User Field 1	Bldg Sq Footage	User Field 9	User Field 9
User Field 2	User Field 2	User Field 10	User Field 10
User Field 3	User Field 3	User Field 11	User Field 11
User Field 4	User Field 4	User Field 12	User Field 12
User Field 5	User Field 5	User Field 13	House Style
User Field 6	User Field 6	User Field 14	User Field 14
User Field 7	User Field 7	User Field 15	User Field 15
User Field 8	User Field 8	User Field 16	User Field 16

OK  
Cancel

There are 16 user-definable fields available within the prospect screen. The first 8 fields are unvalidated fields, the next 4 fields are preformatted for date information, and the last 4 fields are validated fields. The field names may be modified at any time by going into the utility section and entering the names of those fields you wish to use.

## Set User-Definable Fields – Proposals Tab

(Detailed In Setup Wizard Chapter)

The screenshot shows a dialog box titled "User Definable Fields Setup" with two tabs: "Prospect Screen Definable Fields" and "Proposal Screen Definable Fields". The "Proposal Screen Definable Fields" tab is active. The dialog contains the following elements:

- Instructional text: "This area determines the description that will appear for each user-definable field in the proposal custom field screen. Click On CheckBox To Print Field On Proposal"
- A text box labeled "Proposal Heading For User-Definable Fields" with an empty input field.
- A grid of 16 user-definable fields, arranged in two columns of eight rows. Each row contains a label (User Field 1-8 on the left, User Field 9-16 on the right), a text input field containing the same label, and a checkbox.
- Buttons for "OK" (with a green checkmark icon) and "Cancel" (with a red X icon) on the right side.

Field Label	Field Name	Print Field
User Field 1	User Field 1	<input type="checkbox"/>
User Field 2	User Field 2	<input type="checkbox"/>
User Field 3	User Field 3	<input type="checkbox"/>
User Field 4	User Field 4	<input type="checkbox"/>
User Field 5	User Field 5	<input type="checkbox"/>
User Field 6	User Field 6	<input type="checkbox"/>
User Field 7	User Field 7	<input type="checkbox"/>
User Field 8	User Field 8	<input type="checkbox"/>
User Field 9	User Field 9	<input type="checkbox"/>
User Field 10	User Field 10	<input type="checkbox"/>
User Field 11	User Field 11	<input type="checkbox"/>
User Field 12	User Field 12	<input type="checkbox"/>
User Field 13	User Field 13	<input type="checkbox"/>
User Field 14	User Field 14	<input type="checkbox"/>
User Field 15	User Field 15	<input type="checkbox"/>
User Field 16	User Field 16	<input type="checkbox"/>

There are 16 user-definable fields available within the proposal screen. The first 8 fields are non-validated fields, the next 4 fields are preformatted for date information, and the last 4 fields are validated fields. The field names may be modified at any time by going into the utility section and entering the names of those fields you wish to use.

## Set System Defaults

(Detailed In Setup Wizard Chapter)

The System Defaults area should be setup for your company to assist in the creation of new prospects and proposals.

Font Style	Email Settings	Inventory		
Prospects	Prospect Report	Proposals	Proposal Report	Print Proposal
State	<input type="text"/>			
Tax Code	Phoenix	...		
Tax Code Field Label	TaxCode			
Account Type	Prospect	▼		
Property Type	Res	▼		
SalesRep ID	JRW	...		
Display Prospect Count	Yes	▼		
Hide Inactive Prospects	No	▼		
Map Directions Source	Company Address	▼		

The proper setup of the System Defaults is essential to the proper use of Pursuit. Please make sure to take your time and enter settings in this section that are appropriate for your company.

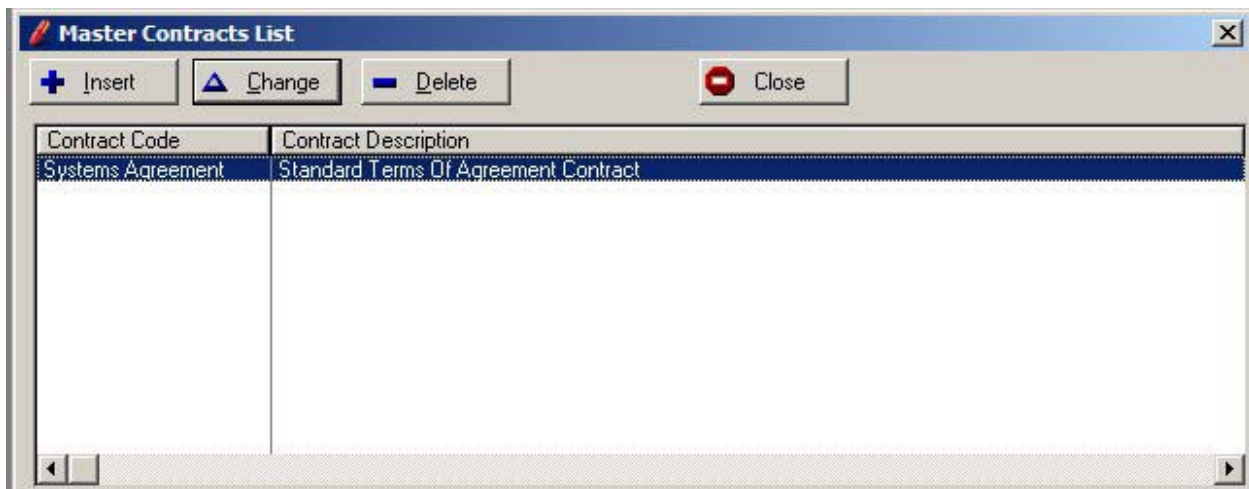
## Master Contracts

Pursuit can store multiple contracts in the Master Contract area, and then for each proposal you create you can select which master contract will be appended to that proposal. Although most companies may have only one contract for their business, others have multiple contracts – depending upon the type of work being performed or the type of client the work will be done for. In either case, you first type your contract into the Master Contract area and then you easily select from this list the appropriate contract you want to use on the proposals' 'Contract' tab section.

All of the RTF formatting controls are supported so that you may adjust the typeface, font size, color, and other attributes of the contract. In addition, spell check is supported (just as it is in any RTF field throughout Pursuit).

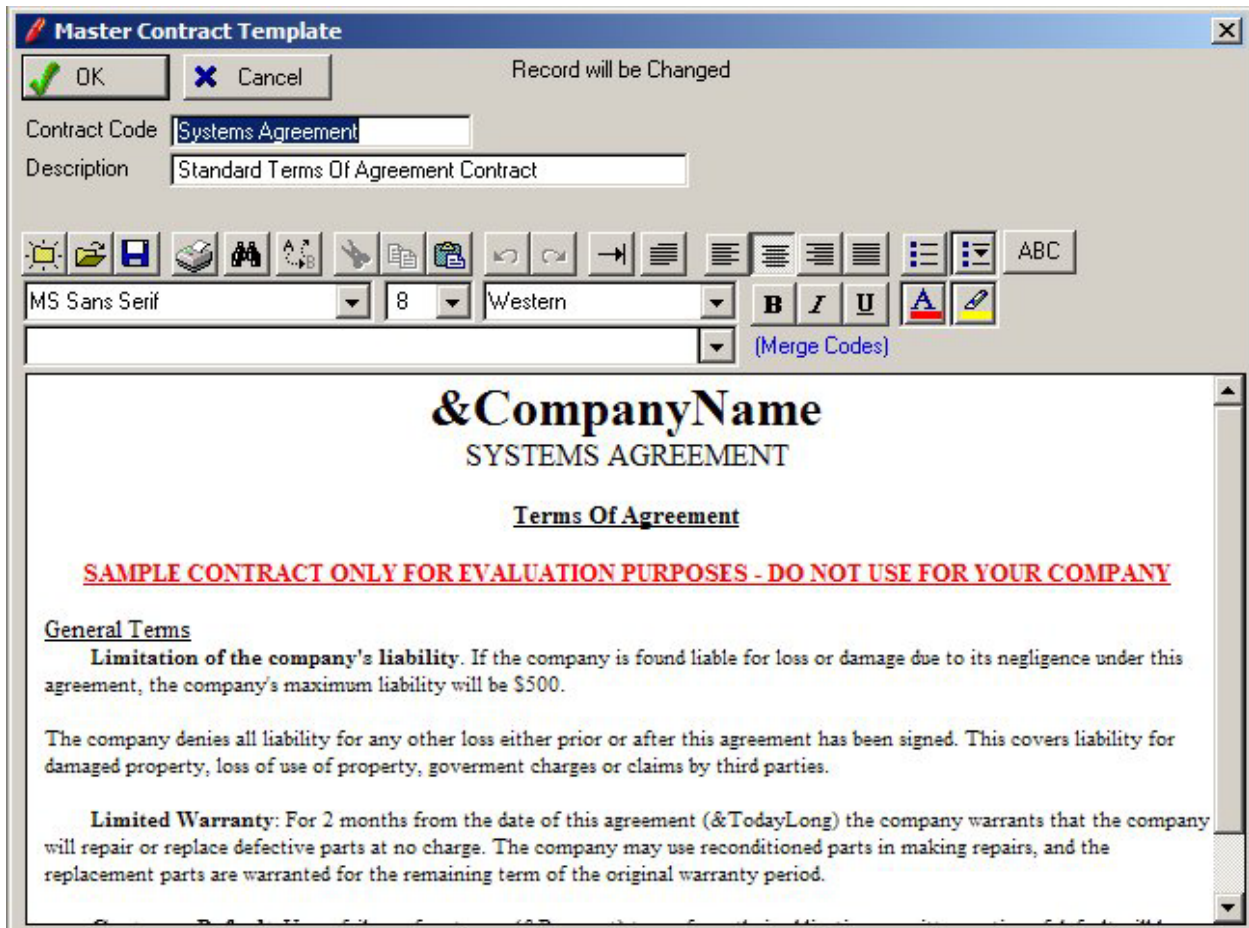
What makes Pursuit's contract writer different than the standard word processor template you may be using (or just preprinted forms) is it's ability to merge related prospect data for a personalized contract. With 30 different fields to select from – ranging from your company name/address to the prospects name/address, site information, dates, proposal price, etc. – you will be creating a truly customized presentation to your client.

To bring up the Master Contract list, click on the Master Contract selection in the System Utilities menu section.



Click on Insert to add a new Master Contract to your list, Click on Change to modify an existing master contract, or to delete a master contract click on Delete.

When adding or modifying an existing Master contract, you will see the following screen (the contract information in this example is only for illustration purposes and is not included in the Pursuit software – you will enter your own contract:



- Contract Code** This is the name you will assign to this Master Contract, as it will be identified in the Master Contract List.
- Description** A brief description identifying this Master Contract.
- RTF Controls** Provides selection of typeface, font size, colors, bullets, spell check and other attributes throughout your contract. See RTF Controls section in the beginning of this documentation for an explanation of each control.
- Merge Codes** The Merge Codes field is a drop-down selection field that consists of approximately 30 different merge codes. Each merge code represents a field in Pursuit that can be placed anywhere within your Master Contract. When the Master Contract is selected for inclusion on a proposal (from within the Contract Tab section of the proposal), all merge codes in the master contract are automatically replaced with the value of those fields for that particular proposal/prospect.

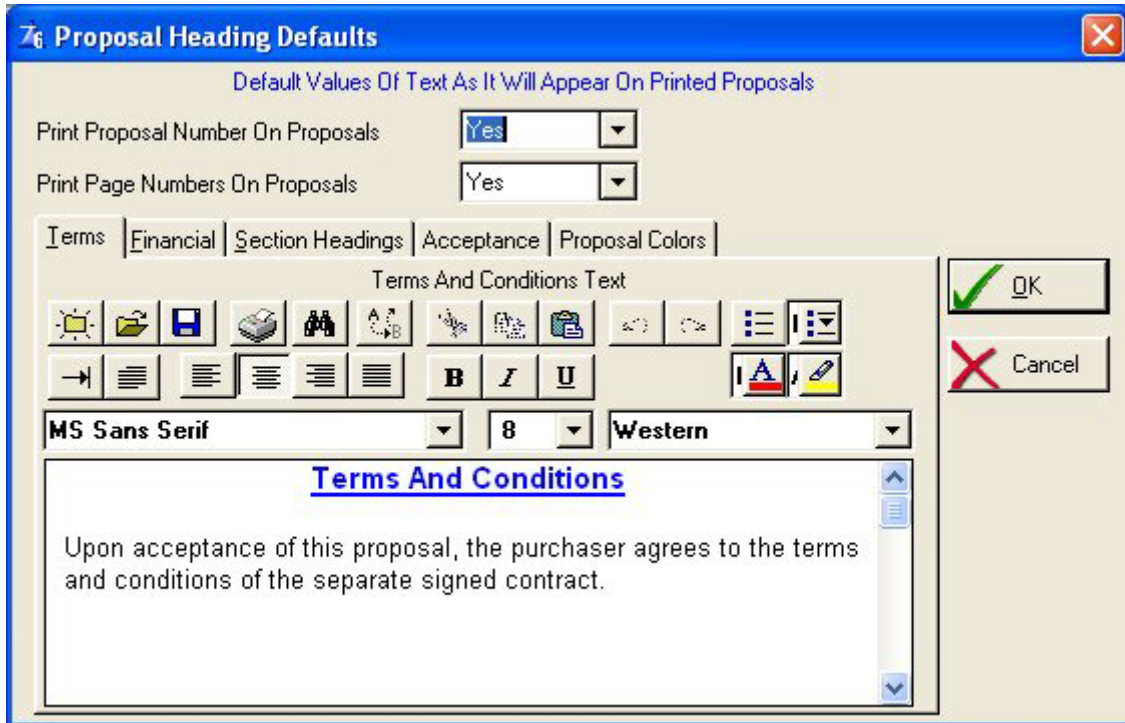
Merge codes include selections for:  
Your company name, address, telephone, license  
Prospect name, address, telephone, main contact  
Proposal number, proposal total price, salesrep  
Today's Date, Proposal Date, Installation Date, Completion Date

**Contract Section** This is the area where you enter the terms of your contract. Using the RTF controls above, enter your contract using any combination of typefaces and fonts that you require. Wherever you want to place a merge code that will be replaced by actual data, click on the Merge Codes drop-down field described above, and select the appropriate merge code. A merge code will be placed where your cursor is currently positioned in the contract text area. There is no limit to the number of frequency of merge codes that you place in your master contract. If your contract is more than one page long, then Pursuit will automatically print your contract on multiple pages (you will not see the page break on the screen, however Pursuit will automatically page when the contract prints along with the proposal).

When you are finished entering your contract, click on OK to save.

## Proposal Heading Defaults

(Detailed In Setup Wizard Chapter)



The section determines the text headings and colors that will appear on the proposal, as well as the Terms and Conditions text that appears on the final pricing page.

**NOTE:** *It is highly recommended that you use the MASTER CONTRACTS section of Pursuit (Utilities/Master Contracts) to set your Terms and Conditions text. Therefore, in this section you should reference your contract – without actually putting your terms and conditions in this area (see example on screen).*

**Proper legal advice should be attained from your legal council regarding the proper type of contracts to have your customers sign.**



## Import / Export

### Import Customer From Billing



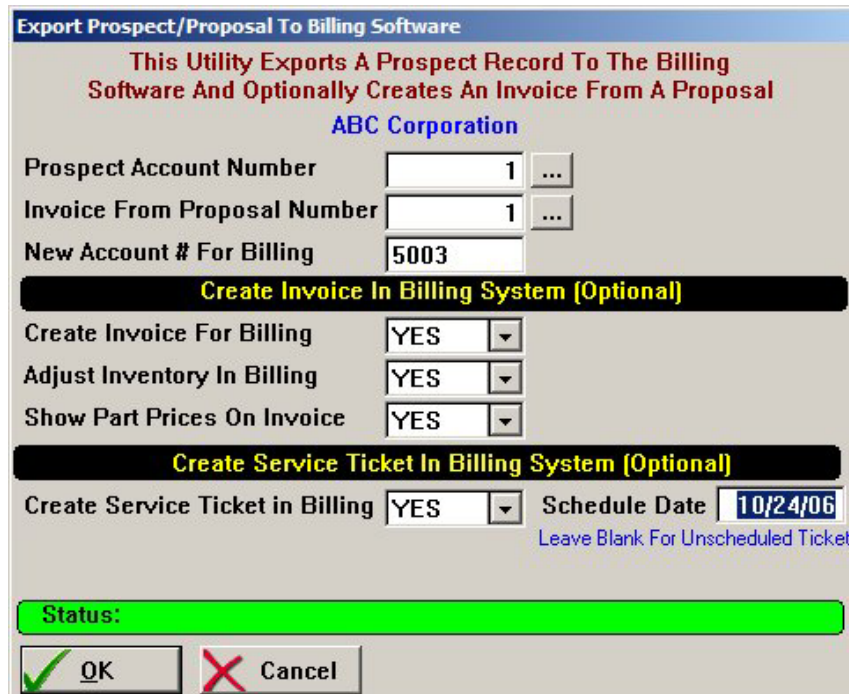
**Import Customer From Billing**

This Utility Imports A Customer Record From The Billing Software

Customer Account Number In Billing System

If you are using the ALARM or SERVICE EXPRESS billing programs, you may import a customer record from the billing program into PURSUIT. This is helpful if a customer is already on file in the billing system and you wish to generate a proposal for additional work. Just enter the account number of the customer in the billing program to import the customer record.

### Export Prospect To Billing Program



**Export Prospect/Proposal To Billing Software**

This Utility Exports A Prospect Record To The Billing Software And Optionally Creates An Invoice From A Proposal

ABC Corporation

Prospect Account Number

Invoice From Proposal Number

New Account # For Billing

**Create Invoice In Billing System (Optional)**

Create Invoice For Billing

Adjust Inventory In Billing

Show Part Prices On Invoice

**Create Service Ticket In Billing System (Optional)**

Create Service Ticket in Billing  Schedule Date

Leave Blank For Unscheduled Ticket

Status:

If you have made a sale to a prospect and you currently use the ALARM or SERVICE EXPRESS billing software system, you may easily transfer relevant information about that prospect into the billing program.

Once you have selected this selection from the Utilities/Import Export menu, you will be asked to enter the following information:

**Prospect Account Number** Enter the number assigned to this prospect in PURSUIT. If you do not know the account number of this prospect, then select the lookup button to the right of this field to display a list of your prospects. You may then choose the appropriate prospect from this list and the account number will be entered for you.

**Invoice From Proposal Number** You need to identify the proposal number that will be used if you will be creating an invoice during the export by selecting the lookup button and choosing a valid proposal.

**New Account# For Billing** In order for this prospect to be copied over to the billing system, you must assign an account number as it is to appear in the billing software. Once a number is entered, PURSUIT will check this account number to make sure it does not already exist in the billing system.

*The following fields pertain to creating an invoice in the billing system (Alarm/Service Express)*

**Create Invoice For Billing** You have the option of creating an invoice in the billing system from the proposal in PURSUIT. If you wish an invoice to be posted to this customer's account in the billing system, then select YES otherwise select NO.

**Adjust Inventory In Billing** You may have your inventory on-hand stock count adjusted automatically. If you select YES, then your inventory stock will be deducted by the quantity of each part identified on this proposal. Select NO to bypass inventory adjustment.

**Show Part Prices On Invoice** You have the option of printing each part on the invoice along with the price for each part (select NO), or have just the part id's and descriptions appear on the invoice but only the TOTAL job price will be printed on the invoice (select YES). In either case, a PRODUCT INVOICE will be created in the billing system for this customer.

**Create Service Ticket** Select YES to have Pursuit generate a service ticket within Alarm or Service Express for the installation of this job. The service ticket will be attached to the customer account and can be modified from within those billing programs.

**Schedule Date** If you know the date of installation and want to schedule the installation, enter the scheduled date here.

## **Import ADI Catalog Disk**

If you are using PURSUIT in the security industry, ADI provides an electronic catalog of their parts and prices for all parts they distribute to dealers. This disk is the ADI Standard or Executive Price List and is available to all authorized ADI dealers. If you subscribe to this disk, you may import the ADI catalog into the inventory file of PURSUIT from within this section. You may choose to import only parts from certain manufacturers if you wish.

To perform the import, select YES to continue the import process, enter the name of the file path where the ADI price file is found (you should already have the ADI price disk installed onto your hard disk).

You may leave the default path as C:\ADIWIN\EXEC.DBF if you are an 'executive' price dealer or you may change this path to read C:\ADIWIN\ITEM.DBF if you are a standard price dealer. This is where the price list would normally have been installed to. If your ADI price list is located anywhere other than this default location, please enter that path name.

You will then be asked if you wish to markup the ADI prices by a certain percentage. If you enter a percentage in this field, then PURSUIT will calculate the chargeable price for each item based upon the markup of the ADI dealer price. For example, if the ADI dealer price for a panel is \$100 and you enter an across-the-board markup of 50%, then the price that will be charged to your customers for this part will be entered into the inventory file as \$150. This markup will work only for new parts being added into PURSUIT.

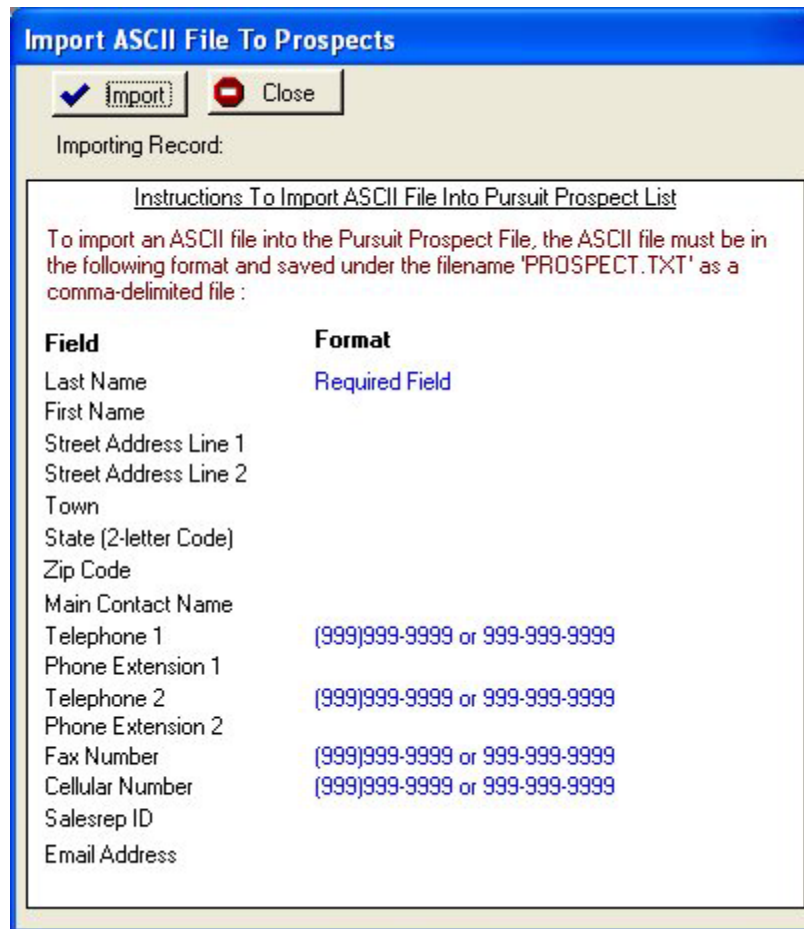
Once these fields have been entered, PURSUIT will convert the ADI catalog into a format required for the import. This will take a few minutes.

Before the actual import takes place, you may select to import ALL manufacturers parts, or just one particular manufacturer at this time. If you wish to import all parts found on the ADI price list, then press enter on the default word of ALL. If you wish to import individual manufacturers parts instead, then enter the first manufacturer code to be imported in this field. The manufacturer codes may be printed from the ADI catalog software. If you do choose to import an individual manufacturer, once the import is finished you will be asked to enter another manufacturer code. You may continue to import manufacturers in this fashion until you are finished. To finish, leave the manufacturer code field blank and press ENTER.

If a part on the ADI price list is already in your PURSUIT parts list, then only the ADI dealer price field will be updated with the current ADI price. No other adjustments to the parts file will be made for that part.

If you are a user of Z-Micro Technologies, Inc. Alarm or Service Express programs, they also come with the same ADI Import Utility. You may use either that programs' ADI import or the Pursuit ADI import. Since the Inventory system is shared by both Pursuit and the billing programs, both systems will be updated with this ADI import.

## Import ASCII to Prospects



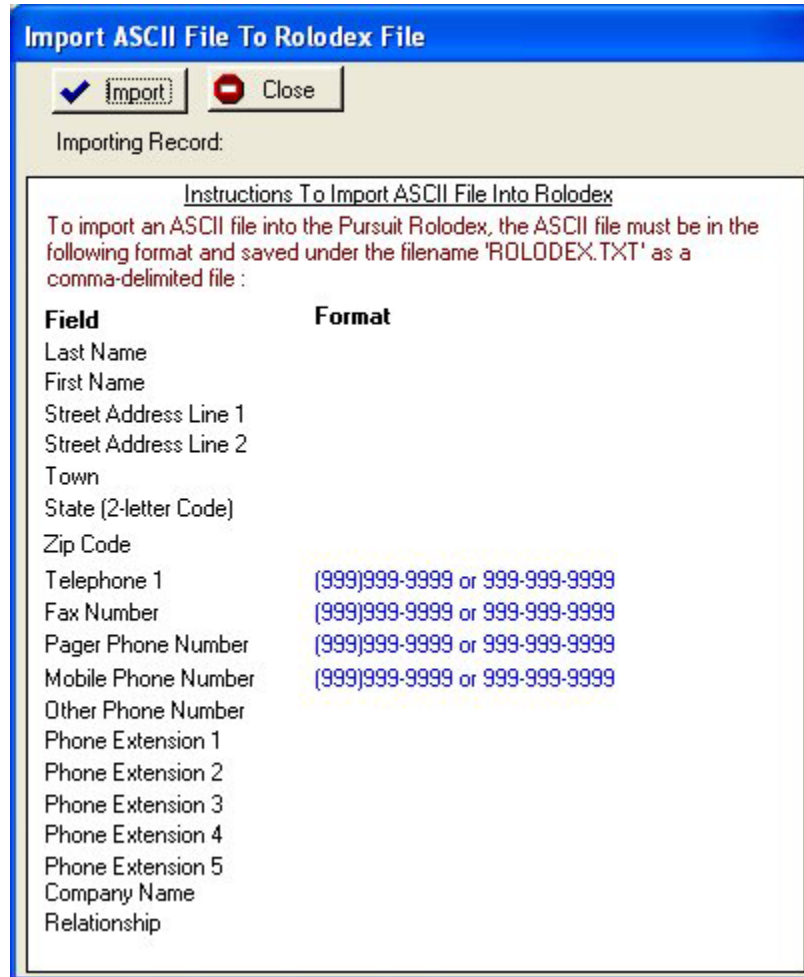
You may import a list of prospects into Pursuit by creating an ASCII (comma-delimited) file in the format specified above. Since Pursuit can consist of an unlimited number of prospects, there is no limit to the number of records you can import into the Prospect List.

You must make sure your ASCII file is named 'PROSPECT.TXT' and is stored in the same directory as your Pursuit software. It must also match EXACTLY the order of fields as specified above.

Once you are ready to start the import, click on the IMPORT button. A status of the number of records being imported will then be displayed on the top of the screen.

**NOTE: Please be sure to make a backup of your Pursuit software BEFORE running this import. If you have any errors in your import it is not possible to revert your Prospect list back to the point it was before the import. You would need to perform a restore of your Pursuit files in order to do that.**

## Import ASCII to Rolodex



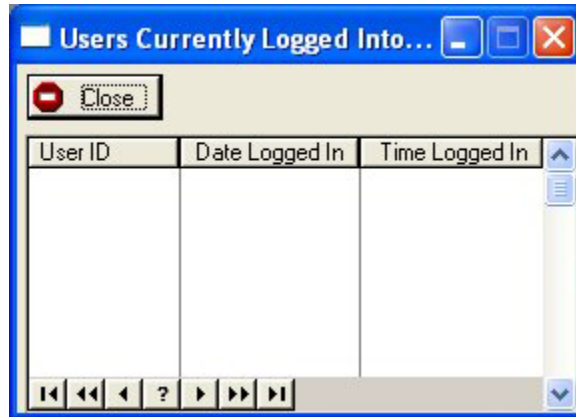
You may import a list of contacts (not prospects – which should go into the Prospect file) into Pursuit by creating an ASCII (comma-delimited) file in the format specified above. Since Pursuit can consist of an unlimited number of contacts in the Rolodex file, there is no limit to the number of records you can import into the Rolodex List.

You must make sure your ASCII file is named 'ROLODEX.TXT' and is stored in the same directory as your Pursuit software. It must also match EXACTLY the order of fields as specified above.

Once you are ready to start the import, click on the IMPORT button. A status of the number of records being imported will then be displayed on the top of the screen.

**NOTE: Please be sure to make a backup of your Pursuit software BEFORE running this import. If you have any errors in your import it is not possible to revert your Rolodex list back to the point it was before the import. You would need to perform a restore of your Pursuit files in order to do that.**

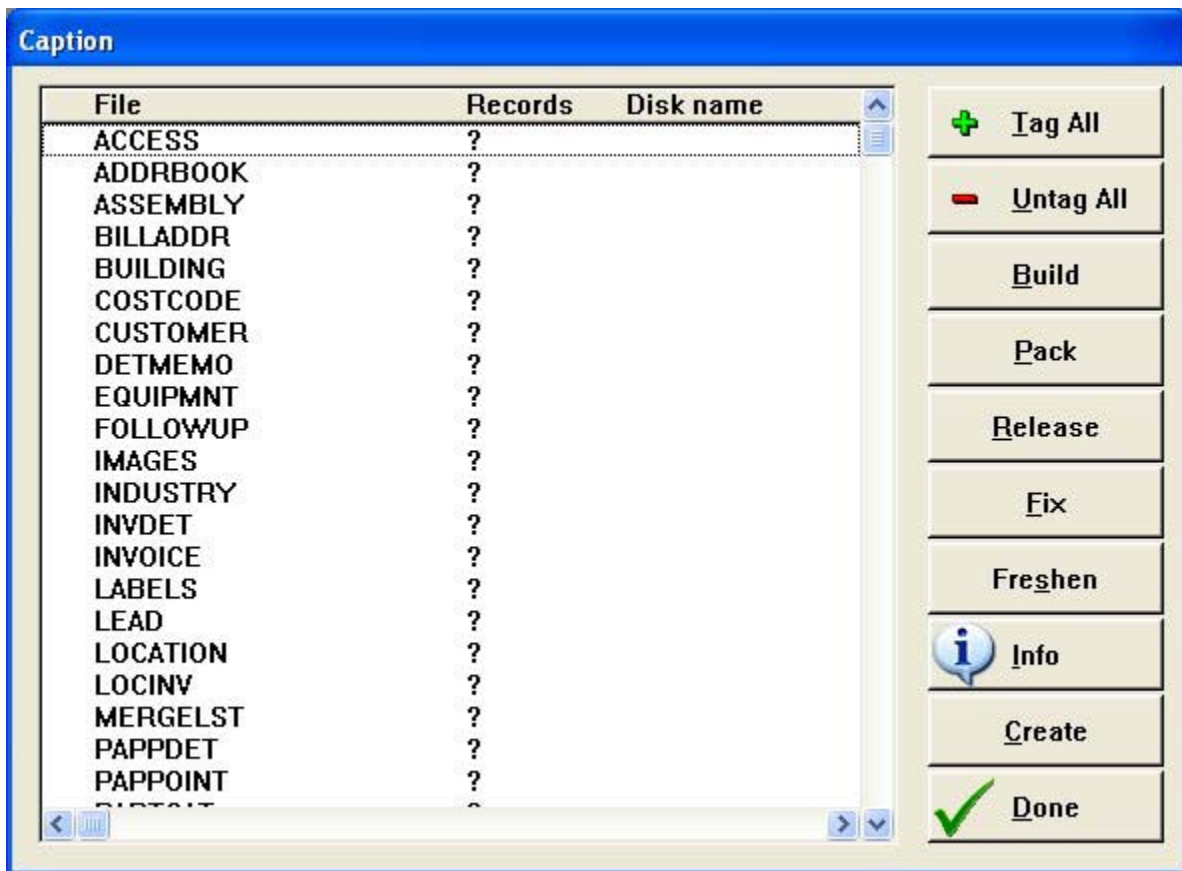
## Users Currently Logged In



This list will display all Users that are currently logged into Pursuit. This list is useful if you are on a network and need to perform a shutdown of your server, or if you just need to notify all users currently logged into Pursuit.

The Logged In list displays a list of all currently logged in users, along with the date and time they last logged in to Pursuit.

## File Repair Utility



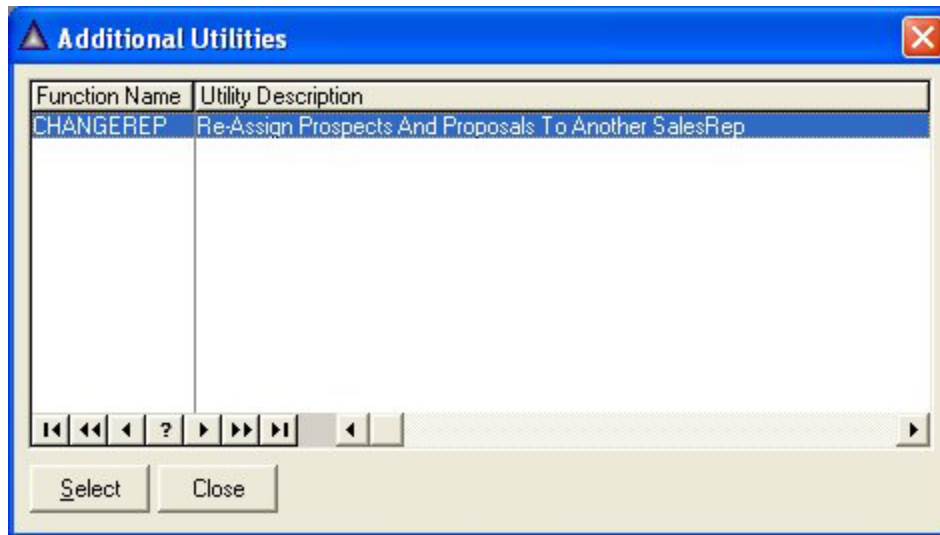
Pursuit is a database product and all databases need maintenance from time to time. If you find you are having problems with cross-linked records (ie: proposals showing up under the wrong prospects) or if you are getting error messages such as 'Illegal Operation' or 'CPTB Error Line...' then you may need to perform a File Repair on one or more files.

To repair a file, click once on the file listed so that it becomes highlighted. Then click on the FIX button and follow the prompts until the file is repaired. If there is not too much damage to the file, you may also want to try the BUILD and FRESHEN buttons (individually). Make sure to only repair one file at a time.

If you do not know which file is causing a problem, please contact us and we will let you know which file(s) to repair. You will need to inform us as to what section of Pursuit you are in when the error occurs, and what function you were attempting to do (insert, modify, etc.)

**NOTE: YOU SHOULD ALWAYS CALL TECHNICAL SUPPORT BEFORE DOING A FILE REPAIR**

## ***Additional Utilities***



Currently the Additional Utilities section (Utilities/Additional Utilities) consists of the following functions:

### **CHANGEREP**

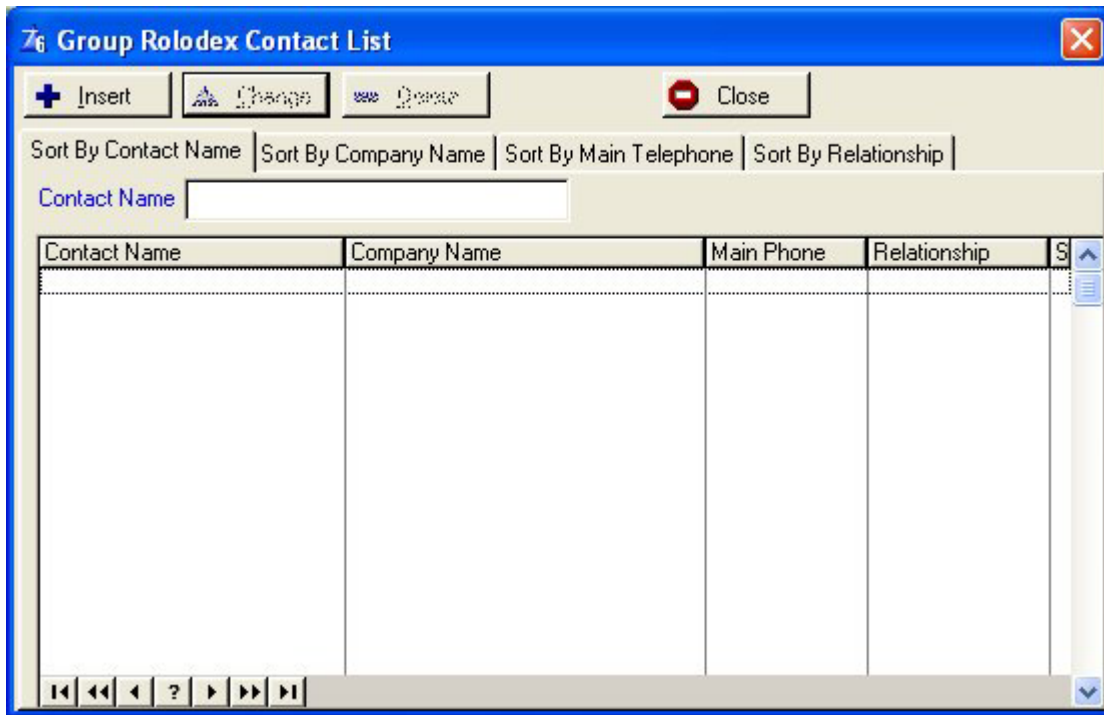
This utility allows you to reassign all prospect and proposals records from one Salesrep ID to another Salesrep ID. This is very useful if a sales person leaves your organization and you wish to reassign all of their accounts to another sales person.



# Chapter 10: Rolodex

## *Group and Personal Rolodex*

The Group and Personal Rolodex sections have the exact same purpose and definition. The difference between the two is that the Group Rolodex displays a list of rolodex records for ALL users that have entered contacts into the rolodex section. The Personal Rolodex shows only YOUR Rolodex items that you have entered (based upon User ID tagging on the rolodex record as it is being entered).



**Sort By Contact Name**      Sort Rolodex List By Contact Name

**Sort By Company Name**      Sort Rolodex List By Company Name (optional)

**Sort By Main Telephone**      Sort Rolodex List By Telephone Number

**Sort By Relationship**      Sort Rolodex List By Type Of Relationship (ie: Vendor, Sub, etc)

## Add Group Rolodex Record

**Rolodex Name & Address Information** [Close]

Record will be Added

Relation  ...

Company

Last Name

First Name

Address

Town

State  Zip

Comments

Telephone Numbers

Main  Xt

Fax  Xt

Pager  Xt

Mobile  Xt

Other  Xt

OK Cancel

- Relation** Type Of Relationship this contact has with your company. Examples include Vendor, Subcontractor, Friend, Lawyer, Accountant, Utilities, etc. Click on the lookup button [...] to select from a list of relationships you have already entered, or click on INSERT from the validation list to create a new value.
- Company** Enter the name of the Company for this contact (optional)
- Last Name** Enter the last name of this contact
- First Name** Enter the first name of this contact
- Address** Enter the Street, Town, State and Zip Code of this contact
- Comments** Enter any comments pertaining to this contact.
- Telephone** There are 5 fields for various phone numbers including Main, Fax, Pager, Cellular and Other. All phone number fields except Other are preformatted for you. The Other phone number field however is not formatted in case you have a special type of phone number to enter such as 1-800-WE-SERVE.

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