CREDIT MONEY MACHINE ULTIMATE

S o f t w a r e   M a n u a l

This manual is a work in progress and probably it will never be finished entirely.

Our goal is to update this manual every week and add as much as possible, so eventually it would be as complete as possible.

Please contribute with us by letting us know errors, omissions or parts of the program that you want to have a manual sooner.

Just post a Trouble Ticket at www.LMRHELP.com and put CMM MANUAL in the subject so we know.

Thank you.

LMR International, Inc.
Support Team

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Main Screen

Credit Money Machine Net

Different Main Screen Views

Features of the software can be viewed in three ways: in Expert View, Advanced, or in Simple View. By default when you open the software, you will be displayed with the Simpler view.

Each view corresponds to specific features of the areas in the software. Although, the Simple and Advanced View have the same areas in the software included in their screen, they differ in the Basic Contact Information section. The Advanced View have more information fields included in the section than the Simpler View.

How to access

The Advanced Level View can be accessed at the upper most and lower most part of the Simple View using the Advanced Level button.

The Expert Level View can be accessed at the lowermost part of the Simple View screen.

To go back to the Simple View screen, you can click the Simpler View button at the upper right side of the Expert View screen or at the upper most and lower most part of the Advanced View screen.

Contacts Related

Credit Money Machine Net

Add Contacts

Using the Green Plus button

This is the simplest way to add a contact. Just click the green plus button.

Importing from Compatible File Format

If you are already familiar with the software and is able to export contacts, then you could also import contacts in the same compatible file format such as .fmp12.

There are two ways to import contacts from a compatible file format:

1. While in the main screen, go to File>Import Records.

    Then, select the file with the compatible file format containing the contacts you want to import and be added to the software.

    Contacts.fmp12
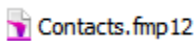
2. Another way is to click the blue arrow facing down located at the upper left corner of the Basic Contact Information section.

Delete Contacts

Delete One by One

Click the red X button at the top left of the Main Screen. This will delete the contact that is currently displayed in the Basic Contact Information area.

Delete From a List

1. Click the List Contacts button from the main screen.

2. A windows dialog will pop up. In this case, select Full.

3. In the Full View screen, click the Delete Contact(s) button to delete either the current (highlighted contact) or all the contacts in the list.

4. Or click the garbage bin icon on particular contacts to be deleted.

    Note You can click the Garbage Bin icon at the topmost row of the last column in the contacts list to delete particular contacts without warning pop up dialog.

Export Contacts

1. At the upper left side of the Basic Information section, there are two blue arrow icons. Click the arrow facing up.

2. You will then be prompted to select only your preferred contact information as shown in the figure below.

3. Once you have set the contact information to be included in exporting the contacts, you can then click the CONTINUE button.

4. Then, select what data to use from your contacts to be used in an email to send to another person: Selected contacts or to the Current contact displayed.

5. Select what type of file to export: Excel or Native

Export as an Excel File The Excel type lets you create an excel file of the contacts as an attachment.

Export as a Native File The Native type lets you create a native file that is compatible with any similar credit repair software as an attachment.

Find Contacts

Finding Contacts in the software is commonly used especially if you have thousands of contacts and you want to locate and display information about each of them.

To find contacts, click the Find button from the main screen.

Once you click the button, you will be displayed with a windows dialog allowing you to enter the contact or contacts that you want to find.

Quick Find

This will have the software quickly find the contacts from all the contacts in the database and will automatically have those searched contacts as currently selected contacts.

Quick Find From Selected

This will search for contacts from the currently selected contacts and not from all the contacts that you have in your database.

Omit

This option is different from the other options in a way that instead of having the searched contacts as currently selected contacts, it will OMIT

them from the database. Note that omitting means temporarily deleting them from the currently selected contacts. NOT DELETING THEM totally.

Expand

Once you search for contacts using the Find Contacts button, by default it will have the searched contacts as the currently selected contacts. This means that if you display the contacts in a list, the searched contacts will only be the one displayed. Using the EXPAND button while searching for contacts, the searched contacts WILL BE ADDED to the currently selected contacts on screen.

Quick Find + Clipboard

This will search for contacts from all the contacts in your database. Once the contacts have been searched, it will be displayed on the screen as the currently selected contacts. Also, it will automatically copy the names of the searched contacts. You can then paste it in any text editor.

Full Find

In Full Find, you can have several options to filter the contacts that you want from all the contacts in your database.

Once FULL FIND is clicked, you will be directed to the FULL FIND SCREEN where all information about the contact is displayed.

To use FULL FIND:

1. Click the Clear Fields button to clear out all the fields from the previous Full Find search.

2. Enter on particular contact information fields that you want to filter the search for contacts. For example, if you want to search for all the contacts that is from Texas, enter TX on the State field.

3. Once you have set your contacts to search, you will then have to select how to search for them. At the upper right part of the FULL FIND screen, there are several Find button as shown in the figure below.

Find From All If you want to find contacts from all the contacts in your database

Find From Found Set If you want to find contacts from the currently selected contacts on screen

Extend Boolean OR If you want to add the searched contacts to the currently selected contacts on screen

Omit Search From Selected If you want to omit the searched contacts

Display Contacts In A List

On the Main Screen, contacts can only be displayed one by one through the navigation buttton.
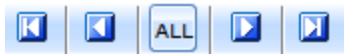
In order to display them in a list without having to browse them one by one, click the List Contacts button under the Contacts tab from the Main Screen.

Display contacts in mini view

1. Click List Contacts button

2. A windows pop up will be displayed for options. Select Mini.

3. In the mini list, there are two selectable fields in every column of the list. Click each field and select the contact information to be displayed on the list.

4. Click the Click to Sync Selected Records button above the list to display the currently selected contacts and omit the previous records on the list.

Display contacts in full view

1. Click the List Contacts button

2. A windows pop up will be displayed for options. Select Full.

3. The Full View list will be displayed in another screen of the software.

Create List in Clipboard

One of the most special features of the Full View area is the ability to create list with selected information from the contacts and paste them in the Windows clipboard.

For instance to create fax list of the selected contacts in the list, click the Create Fax List in Clipboard button. This will automatically copy all the fax numbers of the contacts from the list. You can then paste them in your Windows clipboard.

Multiple List View

The Multiple List View displays the contact's information on a list as well as manage or ADD STRATEGIC TASKS for them. This is like going the Task Manager but with a list of contacts instead of a ONE BY ONE display.

Group Contacts

Contacts or clients that you have in the software can be grouped based on similar information. This is best when you have thousands of clients and you want to manage and select them in one-click.

One-Click Groups
User-Defined Group
Memorized Group
On-The-Fly Group
To Do Group
Agent Assigned Group

How To Access

Simple/Advanced View Screen > Contacts tab

Expert View Screen > Contact Groups tab
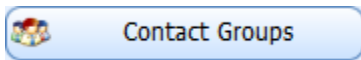
One-Click Groups

ONE-CLICK-GROUPS

GROUP	T-MKG	GROUP	U.D.G.

One-Click-Grp1

Active Clients		S	C
Empty 02		S	C
Empty 03		S	C

Assign contact/s to a one-click group Mark the check box of the selected group on the contact that you want to assign. OR click the S button to mark all selected contacts.

Select contacts from one-click groups Click the selected one-click group. A windows dialog will pop up with four options: Expand, Omit, Selected, All.

Select Expand if you want to add to the currently selected contacts the selected one-click group. Select Omit if you want to omit the selected one-click group.

Rename predefined One-Click groups To rename, go to the *Group/Field Labels* area under Setup and click on the field of the particular group that you want to change names.

User-Defined Group

ONE-CLICK-GROUPS

GROUP	T-MKG	GROUP	U.D.G.
Select Others		Select Yours	
Add Group		Summary	

Open User Defined Groups

Set 🖝 texas based

Set 🖝 total database
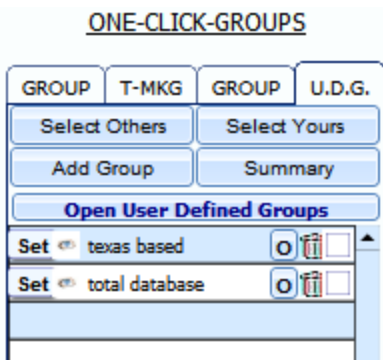
Add a new user-defined group
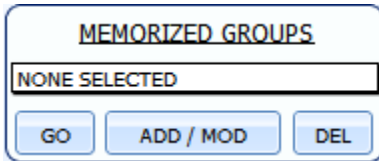
1. Click the Add Group button
2. Select Agent
3. Provide the user-defined name of the group then click OK

Assign contact/s to a user-defined group Click the Set button of the user-defined group that you want to assign to a contact. Please hover on the Set button to show other options on assigning contacts.

Check if a contact is assigned to the user-defined group To check if the current contact is assigned to a particular user-defined group, just click the icon next to the SET button.

Select contacts from a user-defined group Click the selected user-defined group and select from the provided options.

Memorized Group

Add a new memorized group

1. Click the ADD/MOD button. Once clicked, you will be directed to the MEMORIZED GROUP AREA.
2. In the said area, click the Clear Fields button to make sure that all information fields are cleared.

3. Click the Add Group button and provide the name of the group in the Memorized Group Name field.
4. Filter the contacts database based on the contact's information. For example, if you want to filter the contacts that are from Texas, enter TX in the State field inside the Memorized Group Area.
5. Click the Save Group button.

Select contacts from a memorized group Select a memorized group through the dropdown field. Then, click the GO button to find and select all contacts based on the memorized group.

On-The-Fly Group
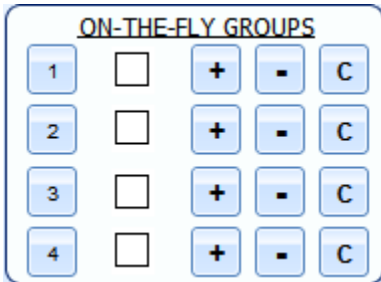
Assign contacts to an on-the-fly group

- ☑ To set a current contact to an On-The-Fly Group, directly mark its check box.
- ☑ To set selected contacts, click the + button. Automatically all the contacts will be included in the group and will be check-marked.
- ☑ To ungroup selected contacts from an On-The-Fly group, click the – button. In the case where you only want to ungroup the current contact, just unmark the particular checkbox.

Select contacts from an on-the-fly group Click the button number of the selected on-the-fly group. A windows dialog will pop up with four options: Expand, Omit, Selected, All.

Select Expand if you want to add to the currently selected contacts the selected on-the-fly group. Select Omit if you want to omit the selected on-the-fly group.

To Do Group

The To–Do Groups allows you to split and assign partial groups to agents or just to process in some way, call, emails, etc. a portion of the total selection.

☑ The T button represents the TO DO group while the D button represents the DONE group.

- To include the current contact to the TO DO group, just mark the checkbox beside the T button.
- To include the selected contacts to the TO DO group, just click the + button in line with the T button and click the – button to exclude the selected contacts to the TO DO group.

☑ The DONE group represents the group finished on assigned tasks.

- Once the contact is done with the assigned task or you have finished transactions with, you can then mark the checkbox beside the D button.
- If the selected contacts are done, on the other hand, you can click the + button or the – button to exclude them from the DONE group.

☑ To clear the checkmark, click the C button.

☑ To select for contacts from the To Do group, you can click the Next To Do button and indicate the number of contacts to select.

☑ In the case where you have a large database, you can indicate the number of contacts to select from the To Do group using the Sample button with the text field where you input the number of contacts.

☑ To retrieve the previously selected To Do group of contacts, click the R button. To set the selected TO DO group of contacts to the testing group, click the + button in line with the R button or click the – button to omit the testing group.

Agent Assigned Group

The Agent Assigned Groups is used to separate contacts that you want to assign tasks from contacts that you have done on assigned tasks.

Task Manager

The Task Manager is part of the software where you can assign tasks to or for a particular contact. It has a special feature where it can assign one or several tasks to other agents as well.

The Task Manager is just situated on the main screen of the software. Once you have the access to it, it would just be directly viewed in the main screen without going inside the software.

Assign a task to a contact
The Task Scheduler List
Assign strategy task
Set Priority to Tasks
Set the task's next action date/time
How to Find a Task
How to Dispose a Task
Create a predefined task/custom message

How To Access

Simple/Advanced View Screen > Contacts tab

Expert View Screen > Time Related tab
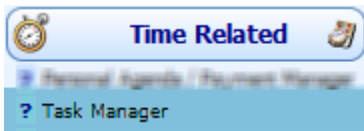
Assign a task to a contact

Assigning a task to a contact is very helpful in cases where you have transactions or negotiations to deal with this contact.

1. To assign a task to a contact, the first thing to do is to select a contact or a group of contacts.

2. Then, assign the selected contact/s using any of the following methods:

   Using The Green Plus Button In this method, you will be asked to SELECT AN AGENT who will also be assigned to the task through a pop up box.

   Using The F Button The F BUTTON enters 'Follow up (see notes)' in the task content. Usually, this is used when you have notes added to the contact or client. When you add a task using this button, the agent assigned will be the current agent signed-in.

   Using the Add One Task button This button is located inside the Task Scheduler List.

   Using The S Button
   The S button or the Snippet button is used to add predefined task. This option provides a fast entry of snippets into the task field. When you add a task using this button, the agent assigned will be the current agent signed-in.

   Once clicked, a windows dialog will open where you can select a predefined task or "Task Snippet", add another snippet, or delete a selected snippet.

The Task Scheduler List

The newly created task will be added to this list called TASK SCHEDULER LIST which is specific to a particular agent. You can enter/edit the content of the task by clicking the text field of the particular task.

Please notice the initials JS in the task text area and the number 1 with the green highlight in the Task Schedulers List. JS represent the initials of the current agent (self) or the agent selected from adding the task. The highlighted number indicates it's a task for the current agent (self). Color yellow indicates task for other agents.

Assign strategy task

Strategy tasks are tasks that are grouped in order to utilize the time of adding tasks one by one. Usually tasks are grouped because they are under the same task category or they are tasks that are related to each other and must be done consecutively.

To assign a task strategy to contacts:

1. Click the 'A' BUTTON.
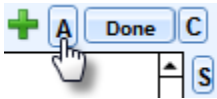
    You can also assign the current contact a task strategy in the Task Schdeduler List using the Assign Task Strategy button.

    The Action button will lead you to the **Strategy Task Snippet** that contains groups of tasks that you created.

2. In the Strategy Task Snippet, click the Add button.

3. Enter the tasks in the text area provided with the following methods:

    You can enter many ACTIONS in one Snippet or manually one per line for a complete Sales Strategy Cycle in one click. If you precede TASKS (lines) with a dash (-) then it becomes a Title and it won't be considered as a task.

If, in a title you put a code between double square brackets like [[LENDER1]] then that code is considered like a set In other words, different sets will be treated independently, test and check for yourself how powerful is this feature.

A + sign and a number then the TASK will be scheduled AUTOMATICALLY based on those numbers (days in between actions). The numbers at the beginning of TASKS (lines) indicate days in between actions.

Also, it is possible to use symbols for many contact fields like in the template manager. Therefore, <<UDF 01>> will be replaced by the content of the User Defined Field 01 for example.

To FILTER this group to one of the buttons above, indicate the number of the button in the text box pointed by the arrow based from the image below. In this case, the group is assigned to snippet button 1.
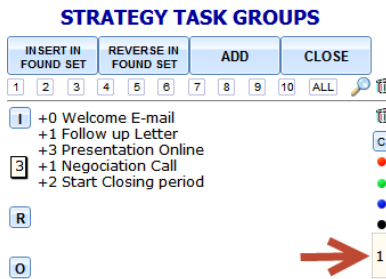
You can insert the strategy tasks to the current contacts or to ALL the contacts in your database. To do the latter, click the INSERT IN FOUND SET button. To insert the strategy tasks to the current contact, click the 'I' button on the left of the tasks.

In this case, we use the 'I' button. Once the strategy tasks are inserted to the current contact/client, the tasks will be displayed in the Task Scheduler list.

Set Priority to Tasks

There are cases where some tasks must be given special attention or higher importance than the others for some reason and there also some tasks that can just be delayed any time. In these times, tasks must be set with specific priorities in order to manage the more important tasks from tasks with less important ones.

Using The Radio Button

○ 1   ○ 2   ● 3

The Task Manager has priorities 1 to 3 and 1 having the highest priority and 3 having the lowest. When you create a task for a client, the task manager will set the priority of the task to 3 by default.

However, the priority can be selected for the particular task once this task is created. You can do this by selecting among the three radio buttons.

Using The Drop Down List Of A Task

In the Task Scheduler List, there is a column that is labeled with P. This column indicates the priority of a particular task. To select a priority for the task, just click on its priority field of the priority column.
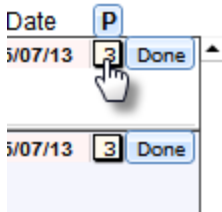
Once the priority field of a particular task is clicked, the area for a specific task will be displayed where you can change its priority number. To display back all the list of task of a particular contact or client, just click the All Tasks tab.

Set the task's next action date/time

Usually, some clients postpone particular tasks due to inevitable circumstances. In these usual cases, the agent needs to set the task or tasks in another time of the day or in a couple more days. Also, there are some tasks that are to be disposed or are already done but needs to be done again in another day.

Note that when you create a task, it will set the current date as its action date by default. This means that newly created tasks are presumed as tasks to be the pending tasks for the day.

In order to set the tasks in a different date and time other than the current date, several ways can be done.

In The Task Box

A task inside the task box is usually the task with the highest priority among the others. In this case, you can set the Next Action Date/Time above the task box as shown in the figure below.

☑ The BUTTONS 1, 2, AND 3 is where you can reschedule the Task Date the number of days based on the number of the button and at the same time omit the selected contact for the tasks.

☑ The NEXT ACTION DATE FIELD is where you can manually enter the next action date of the task with the format MM/DD/YYYY. On the other hand, you can set the next action date using the CALENDAR icon at the right of the text field.

☑ The R BUTTON is used to replace dates of oldest task dates for selected contacts.

☑ The T BUTTON, on the other hand, is used to set the next action date to TODAY, NEXT DAY, or to a WEEK OR DAYS MORE.

- If clicked once, the Next Action Date is set to TODAY
- If SHIFT is pressed then to NEXT DAY
- If CONTROL is pressed then to a WEEK more
- If CONTROL + SHIFT are pressed then to 30 DAYS more

☑ The NEXT ACTION TIME FIELD is where you enter the time to do the CURRENT TASK. You can either enter the time manually or use the buttons on the right for quick entry.

- 10 – 10 minutes after current time
- 30 – 10 minutes after current time
- 60 – 60 minutes after current time

☑   To clear the Next Action Time text field, click the C button.

In The Task Schedulers List

You can also EDIT OR SET THE NEXT ACTION TIME AND DATE of the task at a LATER TIME in this area by clicking the particular task in the Task Scheduler List. Once clicked, you will be directed to the area of the particular task situated under the blank tab next to the All Tasks tab as shown in the figure below.
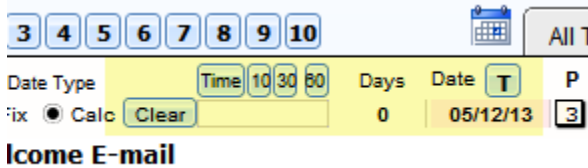
The RECALCULATE BUTTON under the All Tasks tab recalculates the tasks based on dates between days and in order. You use this when you changed the time or date of a particular task on the list.

How to Find a Task

In cases where you have thousands of tasks for a particular client, it is hard to manually browse the list of tasks in the Task Schedulers List. To solve this, the software has several BUTTONS to find a task or tasks in the Task Manager.

A Button
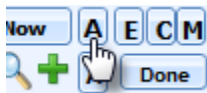
- ☑ If you are an Administrator or Executive then you can click SHIFT+CONTROL+CLICK to be able to select Pending Tasks from other Agents.

- ☑ SHIFT+CONTROL+ALT+CLICK to select ALL Pending Tasks among ALL Agents.

Find Texts In Tasks Button To find tasks based on given text

Find Button To find tasks based on agents

Find 1 Find 2 Find 3 Buttons To find tasks based on priority number. Note that if you click with SHIFT, it will find only today's tasks based on priority number. If you click with SHIFT + CTRL, it will find tasks from other agents based on priority number.

E C M P Buttons To find pending tasks based on the contact's time zone from his/her contact information. E means Eastern Time Zone, C means Central Time Zone, M means Mountain Time Zone, P means Pacific Time Zone

Find Pending Now Button

To find only currently pending tasks.

- ☑ If you are an Administrator or Executive then you can just click it.

- ☑ SHIFT+CLICK to select Pending Tasks that agent have not taken care of.

- ☑ SHIFT+CONTROL+CLICK to be able to select Pending Task from other Agents.

☑ SHIFT+CONTROL+ALT+CLICK to select ALL Pending Tasks among all Agents.

How to Dispose a Task

Disposing a task means deleting all a task. Note that once you dispose a task, its history information will be recorded in the HISTORY TAB located at the lower left part of the main screen. Also, the disposed task will be deleted in the Task Schedulers List.
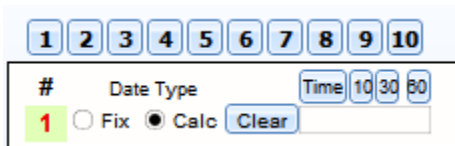
Specifically, the software has five ways to dispose a task

1. By clicking the Done button . Note that this is only applicable to the task that is indicated inside the task box below it. Usually, the task contained inside the said task box is the task with the highest priority among the others. Once you have disposed a task using this button, the succeeding task with the second priority from the disposed task will be contained in the task box.

2. By clicking the Done button of a specific task inside the Task Scheduler List.

3. By rescheduling it through changing the next action date or time. This way, it is as if you have created a new task by just overwriting the content of the task with the old one.

4. By clicking the Clear button in the Task Scheduler List.

5. By clicking the C button beside the Done button in the Task Box

Create a predefined task/custom message

While you can add a task with a predefined list of snippets using the S button, you can also enter a custom message that you have saved earlier that is commonly used for your contacts. Note that this feature of the Task Manager is only available in the EXPERT View screen.

When you add a task and click the newly added task in the TASK SCHEDULER LIST, you will be directed to the area under the tab next to the ALL TASKS tab as shown in the figure below.

Notice the buttons labeled from ONE to TEN. If you click on them, it will automatically enter into the task area the custom message. To set a message on a particular button, click it with SHIFT.

Task Manager + User Defined Fields

Aside from the default fields of the Contact Information section of the main screen, you can also have additional user–defined fields wherein you can create the fields you want for the contact.

Text Fields
Number Fields
Date Fields
Picture Field
Twitter/Facebook/LinkedIn/Skype Field
Set User-Defined Field Labels to Newly Added Contacts

How To Access

Simple/Advanced View Screen > Contacts tab

Expert View Screen > Contacts tab

Text Fields

This is where you enter user-defined field texts, documents, files, and any other additional information about the contact.

Import FNM Button
Notice the Import FNM button at the top right of the Text Fields area using the Expert View screen. This button is used to create a new contact from the Fannie Mae 1003 v3.2 format.
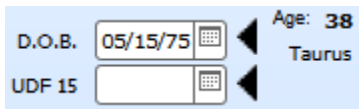
Number Fields

In the Number Fields, you can calculate the Totals & Averages for selected records with the use of the C buttons.

Notice the arithmetic signs beside the number label. Through that, you can make some arithmetical operations. You can also change that sign by clicking on that field.

Date Fields
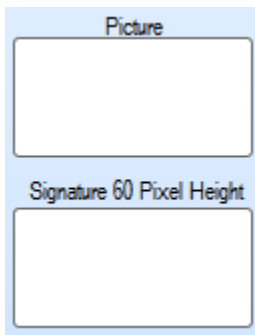
This is where you enter the fields for the contact that contain dates. The black arrows on the right of the date fields are used to filter the contacts database based on the date on the field.

The Age field however, is used to filter the contacts database based on a date range. Also, in the first date field, once filled in, the Age field is automatically filled in with the calculated age as well as the zodiac sign based on the entered date of birth.

Picture Field

This is where you enter the picture/image of the contact. Note that you can also insert address maps or anything in the Picture field.

There are two ways to insert a picture in the Picture field.

- ☑ One way is by directly inserting a picture in the field. To do this, click on the field with the SHIFT key.
- ☑ Another way is by going in the Picture field area where you can import a file, insert clipboard, directly paste a signature image, and other options to choose from. To do this, just click on the Picture field.

Twitter/Facebook/LinkedIn/Skype Field

The Twitter ID field is where you enter the ID or the username of the contact's twitter. The Facebook URL however, is where you enter the URL of the contact's Facebook account as well as the LinkedIn ID in the LinkedIn field. ID and URL is different in a way that you can only enter in the Twitter ID field the ID of the twitter account and not its entire URL.

In addition, the Skype ID field, similar to the Twitter ID field, is where you enter the ID or the username of the contact's Skype account. This way, when you click the Skype icon beside the field, it will automatically connect with what entered on the field.

Set User-Defined Field Labels to Newly Added Contacts

By default when you add contacts, the user-defined fields have labels that start with UDF. Sometimes, it doesn't contain any labels at all.

In order to automatically provide labels as well as default information to the user-defined fields when you add or import contacts to the software, you can set them inside the Setup area.

1. First, click the Setup button under the SETUP tab in the Simple View screen.

2. Once in the SETUP area, click GROUP/FIELD LABELS

3. Then, look for the User Defined Fields label. All you have to do is edit the default UDF labels. You can also set default information for the particular field in the text field beside the label.

Template Manager

The Template Manager is where you can create emails and print documents that pull information from your contacts and agents database. It also has a very special feature of using the same template and works for thousands of letters without changing some parts of the letters such as the address or the recipient's name. Instead of creating dozens of letters with "Dear John", "Dear Michael", or "Dear Bill", you can create a template with "Dear <<<FirstName>>" and the Template Manager will do the work.

Add new template
Spin a selection of synonymous words
Select templates
Display selected templates in a list
Include templates in the Basic Contact Information section, Email System, and Dispute Center
Merge symbol
How to import default templates

How To Access

Simple/Advanced View Screen > Contacts tab

Expert View Screen > Marketing & SEO tab

Add new template

1. Select a category for the new template or add a new category by clicking the Add Category button

2. Enter the title of the template in the Subject field

3. **Optional**
    Attach a file by clicking beside the Attachment field

4. Enter the content of the template in the big white space provided at the center of the Template Manager screen.

Spin a selection of synonymous words

The SPINNER BUTTON is a feature of the Template Manager to spin a selection of synonymous words of a particular word. To do this, first click this Spinner button that will directly give you {|} which is the syntax.

What you do with the syntax {|} is put the synonymous words between the line |. For instance are the synonymous words for best. What you should write in the syntax using this example is {outstanding | excellent}. Also, you can even put several words between the line |. Finally, once the syntax is all done, it will randomly choose from the selection of words.

Select templates

☑ To select ALL templates from ALL categories, click the ALL button in the navigation bar.

☑ To select a template, click on it from the list of templates under the selected category

☑ To select for all the templates under a selected category, click the SELECT ALL button. This button is located beside the "CLICK THE FIELD BELOW TO SELECT A CATEGORY" label.

☑ To select the templates that have been check marked, click the TG button of the selected column and select whether you want to select all the templates in the Template Manage that has been check marked in the particular column using the SELECT ALL TAGGED or if you want to select only those check marked under the selected category using the SELECT CATEGORY TAGGED.

Display selected templates in a list

In the Template Manager, the current template with all its content and other information is displayed at the center of the screen. If you only want to know the Subjects of templates that you have selected, you have the List Selected Templates button under the TEMPLATES tab which lets you display all selected templates in one list.

Include templates in the Basic Contact Information section, Email System, and Dispute Center

☑ In the Email System, the templates are used as a predefined content of an email.

☑ In the Basic Contact Information section, the templates are used as email content to be faxed or emailed to the contact.

☑ In the Dispute Center, templates are used as a response to credit reports.

In order to include templates in the Email System and Basic Contact Information section, check mark the first checkbox on the particular template displayed under the selected category or click its TG button to check mark all the templates.

To include templates in the Dispute Center, check mark the second checkbox of the template or click its particular TG button to check mark all selected templates.

Merge symbol

Under the MERGE SYMBOLS TAB are fields that are used for the template content. These fields are important in a way that when some information is frequently used, you could set them from the available fields. Instead of creating dozens of letters with "Dear John", "Dear Michael", or "Dear Bill", you can create a template with "Dear <<<FirstName>>" by setting up the fields under the Merge Symbols tab.

To do this, just put the cursor on the template content text area and choose from the symbols that you want to insert. Once you have selected a symbol, just click on the text field of the symbol and select the information that you want. The software will then automatically insert the symbol in the template content.

With this, when you email the template, the symbol will appear on its real corresponding information.

How to import default templates

In the case where the default templates are not automatically provided by the software during installation, you can manually import them using the software's CONTACTS.fmp12 file.

To import, go to the Templates Manager. Once inside the Templates Manager, click the File Menu and select IMPORT RECORDS.

A windows dialog will then open where you will have to look for the Contacts.fmp12 file in the software's folder inside your Program Files
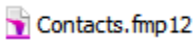
Contacts.fmp12

Once the Contacts.fmp12 file is selected, you will then be presented by another pop up where the specific import takes place. In the Source drop down field, select Templates CMM. Then, click the Import button.

Templates Add Portal
Templates CBM
Templates CMM
Templates Contacts Selectables
Templates Disputes Selectables
Templates DSM

Credit Repair

Credit Repair of the software can extract all disputes, account numbers, amount, and credit bureaus from many credit report providers in just seconds. Not only that, it also automatically suggests correct description, letter to use, and dispute types – all of these with one click.

Credit Repair is also called Dispute Center

Dispute screen options
Dispute information
Change all the status of the current client's dispute entries
Change the credit bureau of the current client from selected disputes
Extract dispute entries from importing credit reports
Setting three different credit bureaus to a dispute entry
Set default templates and description
Setting several disputes per letter
What to do once response letters from the templates are printed
What to do with verified disputes
Setup response to disputes
Creditor Manager

How To Access

Simple/Advanced View Screen > Contacts & Credit Repair tab

Expert View Screen > Credit Repair tab

Dispute screen options

When you try to access Credit Repair, you will be given the five options.

Semiautomatically
This will let you access the Dispute Center Default View where you have to manually add, delete, edit, duplicate, and find disputes for the current contact. Also, it will only display the disputes of the current contact.

Automatically
If you already have your credit reports on hand, you can copy them and click this button. You can then paste your credit reports on the provided text area where the software will automatically extract to be added to the dispute entries.

Expert View With Current Client
This will take you to the Expert View of the Dispute Center where you can fully manage dispute entries of the current client.

Expert View With Selected Clients
This will take you to the Expert View of the Dispute Center where you can fully manage dispute entries of the currently selected clients.

Expert View No Searching
This will take you to the Expert View of the Dispute Center where you can fully manage dispute entries of the most recent selected clients. Thus, there will be no searching for another set of dispute entries based on the current or currently selected clients.

Dispute information

Account or ID
This is where you enter the account number that you have with the Creditor.

Amount/Date
In the Amount field, enter the amount of the dispute. However, if the dispute is an inquiry, you can enter into the field the inquiry date.

Dispute Type
In the dispute type field, the software also provides default dispute type where you can readily select.

There is however a snippet button beside this column named S which lets you create additional commonly used dispute types that you can use on your dispute entries.

Credit Bureau
You can select from the three credit bureaus EQ for Equifax, EX for Experian or TQ for Trans Union.

However, although you can have a one selected credit bureau, if the current dispute is present in the three credit bureaus, you can click the button beside the credit bureau radio buttons or the button on the left side of the CB column to create the three with one click.

Letter/Template
The Letter/Template field is where you enter a template that is particular for the dispute entry that will be used as a response to the credit report of the dispute. When you click on the field, a list of default templates will be displayed where you could select. To the right of the field is an icon where you can preview the selected template.

However, in the case where you want to create a new template, you can go to the Template Manager by clicking the TEMPLATE MANAGER Button inside the Dispute Center. There is also a Template Manager Button from the main screen.

Creditor

You have two ways to enter a creditor entry to the Creditor field. Manually, you can click on the field with SHIFT to directly enter the creditor entry to the creditor field.

On the other hand, there are default creditor entries provided by the software. When you just click on the field, it will show the list of all default creditor entries wherein you can readily select.

Notice that the provided list contains thousands of default creditor entries. With this, when you select from the list, you can use the buttons with the letters on it to find for entries that starts with the indicated letter of the button. This will filter the entries from the list for easier selection of specific entries. Or you can use the Find button on top of the buttons with the letters.

However, if the creditor that you need to enter into the field is not included on the list of default creditor entries, you can use the Add or Modify button to add or modify a creditor entry.

Once you add or modify a creditor entry, you will be directed to the CREDITOR MANAGER area of the software where you can control and manage creditor entries. The Creditor Manager is explained elsewhere in this manual.

Description/Reason
The Description field is where you enter the description that will be merged in the template selected as appropriate. When you click the SET REASON button, a list of predefined descriptions will be displayed where you could select.

Private Notes
This is where you enter any note that is related to the dispute entry.

Status
This is where you enter the current status of the dispute entry. When you click on the field, provided statuses are displayed in a drop down list.

Change all the status of the current client's dispute entries

In the event that you want to set only one status of all the dispute entries of the current client, click the S button beside the Status column.
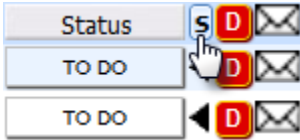
Change the credit bureau of the current client from selected disputes

In the event that you want to assign a particular credit bureau to all the selected disputes of the current contact, you can use the S button on the right side of the CB column in the Disputes Expert View or the Bureau column in the Semi Automatic View.
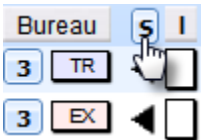
Extract dispute entries from importing credit reports

There are two ways to add dispute entries in the Dispute Center. One is by manually adding them. Two is by automatically adding them through importing a Credit Report. The dispute entries are then automatically extracted from the Credit Report adding them to the list of dispute entries in the Dispute Center.

Extract Automatically

1. Copy the credit report in your windows clipboard

2. Click the Credit Repair button from the main screen

3. Select Automatically. Once clicked, you will be displayed with a
   screen.
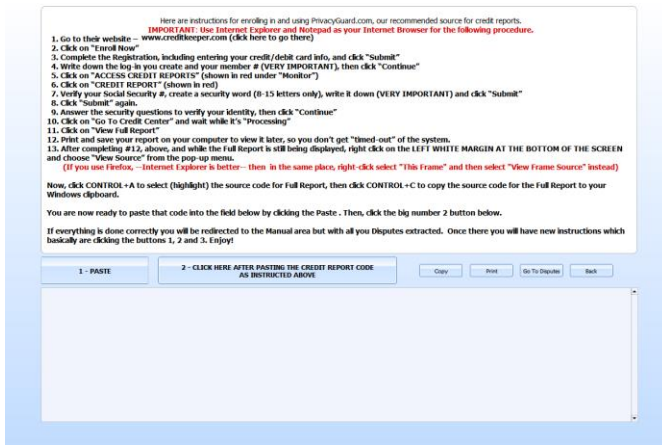
4. Then, click the Paste button to paste the Credit Report in the text
   area below it

5. Once the credit report is pasted into the text area, click button 2.
   The software will then extract the disputes from the Credit Report
   and will automatically add them to the dispute entry list.

6. To view the list, you can either go to Dispute Center default screen
   by clicking the Go To Disputes button or you can click and access
   Credit Repair again with the Expert View option.

Extract Using The Expert View Screen

1. Go to the Dispute Center Expert View screen. To do this, click the Credit Repair button from the main screen and select from the Expert View options.

2. Inside the Dispute Center Expert View, under the Extract Disputes tab, paste the Credit Report file in the provided text area by clicking the paste button (Paste Credit Report by Clicking).

3. Once the credit report is pasted into the text area, extract the Credit Report using any of the Extract buttons beside the provided text field.

Setting three different credit bureaus to a dispute entry

Every dispute must have a unique record from each Credit Bureau. The reason for this is that the answers from the three Credit Bureaus will come at different times and will have a different response. This way, you will be aware of the responses of each Credit Bureau thus, having more knowledge on what to do.

If you are importing the credit report then each Credit Bureau will be assigned correctly. If dispute data is entered manually, then you will need to select the correct Credit Bureau for the dispute that you are entering.

There is also the *Click to Set the 3 Bureaus at Once* button. To use this button, you must select the dispute first. This button can be found under the Detail View tab in the Dispute Center Expert View screen or in the Dispute Center default screen.

You can also use the Duplicate "D" button by clicking it with SHIFT to create two duplicate dispute entries with different Credit Bureaus.

Set default templates and description

When you import a Credit Report to extract dispute entries what is likely to happen is that the Dispute Type fields of the entries are also automatically set. On the other hand, if you manually add dispute entries, typically you also manually set their Dispute Type, their description and what template to be used to send to the Creditor.

By default, when the Dispute Type is automatically set like when you are importing credit reports, the Description and Template are also automatically set based on the Dispute Type.

If the Dispute Type is not automatically set, you can set the Dispute Type of the dispute entries one by one and click the red "S" button beside the Dispute Type column to automatically set the description and template fields default based on the selected Dispute Type. You can also use the *Setup All Disputes* button.

The red "S" button can be found in the Dispute Center Expert View screen while the Setup All Disputes button can be found in the Dispute Center Default View.

Setting several disputes per letter

While it is recommended to send just one dispute per letter using the Schedule Disputes on Due Dates button it's very easy to set several disputes per letters. Just click the "Schedule Several Disputes x Letter" button and set how many disputes will be set per letter and the number of days in between batches. You can also set the number of disputes per letter and the number of days directly on the button.
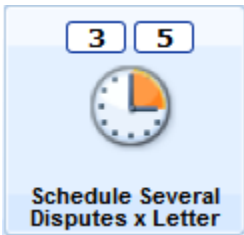
What to do once response letters from the templates are printed

Once you have already printed the disputes ready to be sent to the Credit Bureaus, you can then print the information on the envelope to be used for the printed copy.

To do this, in the Dispute Center Expert View screen, there is an envelope button in the Client column. The same goes with the Dispute Center default view screen where an envelope column is situated beside the red "D" column.
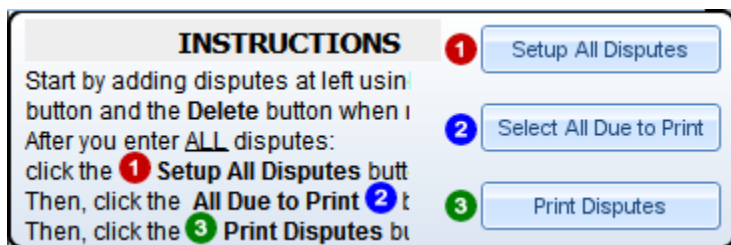
What to do with verified disputes

Once you have received a response from the Credit Bureau about the dispute entry, you can verify the dispute entry. When the dispute item has been verified, you can change the status of the dispute into "No Change" to indicate that it has been verified.

Then, select from the Letter field default template entries the entry 'Verification of Procure after Verified item'. You can then select this dispute by omitting all the other disputes and then print it using the Print Disputes button.

When the status of the verified dispute has been changed, click the duplicated button (D button) to create a copy of that dispute. This is in case that you want to use the same dispute entry in the future. Note that when you duplicate a dispute, the status of the duplicate dispute is set to 'To Do' by default.

Setup response to disputes

This part of the Dispute Center can be found in the Dispute Center Semiautomatic screen.

Setup All Disputes

This will assign automatically the correct Letter and Description (template) as response based on the dispute type of the disputes. The letter will also be scheduled so a group of three letters will be sent every two days. The reason for this is to be able to refrain from sending the response of the disputes all at the same day. To change the duration of days the letters will be sent, click the Schedule Disputes Due on Dates button at the top part of the dispute screen or directly click the selectable field on the button.

Select All Due To Print

Once you have finished setup all dispute items, by clicking this button you will be able to determine which disputes are due to be printed today. By "today", it means the current day you clicked the button.

Print Disputes

This will print selected or current dispute.

Note that when this is done, the status of the printed disputes will automatically set to 'IN PROGRESS' and the FOLLOW UP date field will change to 37 more days from printing date to give the Credit Bureaus enough time to respond.

The "IN PROGRESS" status means that they had been processed. When you receive the answers from Credit Bureaus, remember to update the Status field by clicking on them and selecting another option as appropriate.

Creditor Manager
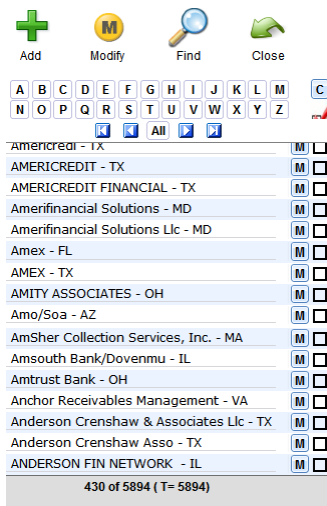
When you click the Creditor field, a snippet of creditor list is displayed as shown in the figure above.

To go inside the Creditor Manager, you must modify any of the available creditors in the list by clicking the M button or the Modify button displaying only the currently selected creditor in the Credit Manager. You can also access the Creditor Manager by simply clicking the Add button.

Add New Disputes On Selected Creditor The Creditor Manager does not only let you control available creditor, it also lets you add disputes selecting only the creditors that you need.

To do this, you must select the contact from the main screen and select the creditors that you want to include in the disputes that you want to add. To select for creditors, just mark the creditor's check box located at the right side of the Creditor's name field. Then, click the "Add New Disputes One For Each Selected Creditor" button.

Change The Default Address Of The Credit Bureaus Another thing about Creditor Manager is that you can change the default address of the credit bureaus provided by the software by clicking the "Click Here to Change the Default Addresses of Credit Bureaus" button.

Personal Agenda & Payment Reminder

Personal Agenda & Payment Reminder is part of the software where you can have your personal schedules and agendas controlled and payments that must be paid in a given time. This way, you can have all your personal and business tasks in place where you can easily track and maintain.

Assign agenda to another agent
How to add agenda
How to set predefined descriptions
How to make the agenda recurrent
Ways to display agenda
Update agenda
Agenda reminder
How to delete agenda

How To Access

Simple/Advanced View Screen > Contacts tab

Expert View Screen > Time Related tab
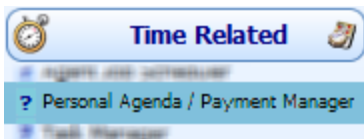
Assign agenda to another agent

Before accessing Personal Agenda, click its button with SHIFT to assign Agenda Tasks to another agent registered in the software.This is a very special feature of the software in a way that you can assign the other agents agenda tasks where they can personally be aware of.

How to add agenda

1. Click on a date in the Calendar section. This will automatically set the alarm date of the agenda to be added.

2. Click the Add Task button

    Click the button with SHIFT to assign Agenda Tasks to another agent registered in the software.

3. Then, enter the description of the task, alarm time, actual date of the agenda, etc.

How to set predefined descriptions

These buttons allow you to add an agenda that has the current contact automatically inserted into the Description field with a predefined description or custom message depending on the particular button.

To set a custom message, click the selected button with SHIFT and enter the text in the provided dialog box.

How to make the agenda recurrent

You can set recurring events to remind you of scheduled activities and specify how many times you want to be reminded. For example, you can set it to remind you of your car payment for 15 payments and then stop.

Under the Recurrent Information from the image above, EVERY is the month the task will occur, NEXT ON is the date of the next task, and TIMES is the number of times the task will occur. However, they will only be valid if the RT checkbox is marked.

Ways to display agenda

Display in Calendar View
In order to display agenda based on week, month, or even day, click the Calendar View button.

Display All Agenda
To display all agenda regardless of when it must be accomplished and when it was done, click the All days View button.

Update agenda

If you wish to move events and agendas you should have done in the past, but did not, to the present date, use the Update to Today button. This will make all old events move to today's date.

1. Click on a date in the Calendar section where all the agendas that you want to update are situated.

2. Click the Update to Today button.

3. Automatically, the alarm date of the agenda that has been recently moved will be changed to the recent date.

Agenda reminder

In the event that Agenda & Reminder button is highlighted with red as shown in the figure above, it means that one of the entries in the particular area has its alarm date & time finished. This will help you be reminded that an agenda or task must be taken into action.

How to delete agenda

Delete ALL agenda
To delete all agenda on a particular date, select on a date in the Calendar section. Then, click the Delete Day button.

Delete agenda ONE by ONE
To delete agenda one by one on a particular date, select on a date in the Calendar section. Then click the garbage bin button of the particular agenda on the selected date.

Agent Metrics System

The Agent Metrics System allows you to assign and track transactions made by an agent for a client as well know how much the company and the agent will get for each finished transactions.

This way, you will be able to know the performance of your company and agents in their work efficiency and productivity.

Add an agent metric entry
Display metric analyzer detail

How To Access

Expert View Screen > Contacts tab
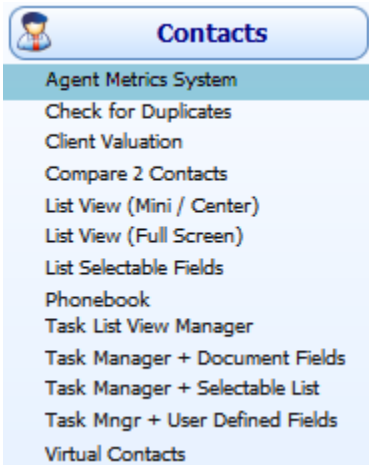
Add an agent metric entry

1. From the main screen, select a set of contacts or a particular contact.
2. In the Agent Metrics snippet, select a metric description code using the drop down field.

   To add a new metric code, click the Add Metric Code button. In order to use this new metric code, click its I button from the Metric Code snippet.

3. Enter the necessary information left in the Agent Metrics snippet.
4. Click the Save and Close button.

Note that every time you access the agent metric for a particular contact, the old metric entry of that contact is still displayed in the snippet. All you have to do is overwrite them until you go to Step 4.

Display metric analyzer detail

In order to view in a list all assigned metrics of an agent for a certain client, click the Details button that is on the bottom part of the main screen Expert view.
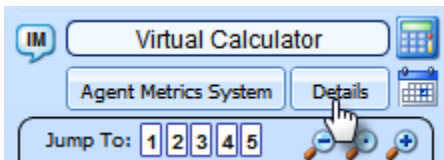
In the Detail View of the agent metrics, you will be able to display specific metrics of your choice and know the percentages of how much the company and the agent will get based on the assigned metric.

List Selectable Fields

The List Selectable Fields is a feature of the software where the list of contacts are displayed directly on the screen. Not all information of each contact, however, is not displayed.

In this feature, only three selectable fields are allowed for each information of a particular contact.

Display contacts using selectable list
Select contacts from the list
Sort contacts in the list
Comparing contacts on the list

How To Access

Expert View Screen > Contacts tab

Display contacts using selectable list

1. Select contacts to display using the Find button or any other way to select contacts.

2. Click the Click to Synchronize Selected Records button.

3. Notice that there are three drop down selectable fields on every column on the list. On every selectable field, select what contact information that you want to be displayed on the list. It will then automatically show the corresponding information of the contacts on the list.

Select contacts from the list

The contacts displayed in the list selectable fields are usually the ones previously selected. In order to select another set of contacts from the list, here's how:

1. Synchronize the selected contacts by clicking the Click To Synchronize Selected Records button to display the currently selected contacts on the list.

2. Omit the contacts that you do not want to select for you new set of list by clicking the O button of the particular contact on the list. If you do not need the particular contact anymore, then you can just click the garbage bin button to permanently omit the contact in the contacts dabatase of the software.

3. Then, click the Select Contacts in List button to select the newly selected list of contacts.

Sort contacts in the list

Notice that each selectable field columns, there is an S button. This will sort the particular information field onced clicked.

The sorting comprises two options: Sort based on the current contact selected and Sort based on the Names of the contacts on the list.

Comparing contacts on the list

On every contact in the list are buttons with the label 2. This button will compare the current contact and the contact next to it. Once clicked, you will be redirected to the Comparison Screen which is discussed in the Compare Contacts which is in another part of this manual.

To compare the first two contacts on the list, click the Compare 2 button.

Phonebook

The Phonebook is a special feature of the software that is almost similar to adding of contacts to the software together with their detailed information. However, Phonebook has an additional attribute that groups contacts according to their relationship or affiliation with each other as well as their affiliation with you.

Add a phonebook entry
Change phonebook group names
Create new contact based on the phonebook record
Add current contact to phonebook

How To Access

Expert View Screen > Contacts tab
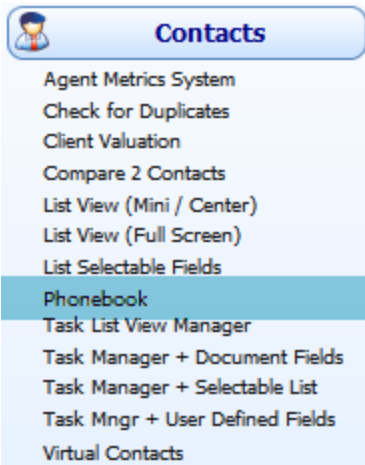
Add a phonebook entry

1. Click the Add button

2. Provide the name, phone, email, etc. of the new contact entry in the given fields in the Phonebook screen

3. Checkmark the group where the new entry belongs

| Family | ☐ | Friends | ☐ | Business | ☐ | Cellulars | ☐ | Services | ☐ |
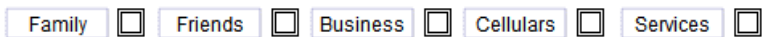
4. **Optional**
   Link the current contact you have to the new phonebook entry by clicking the black arrow facing upward
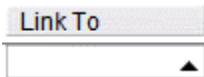
   Link To

   However, you can also provide the Contact ID of the contact that you want to link to this phonebook entry. The Contact ID of a particular contact can be found in the Expert View main screen navigation bar section.

   Jump To: 1 2 3 4 5

   85588660067-611016 S   COPY ID
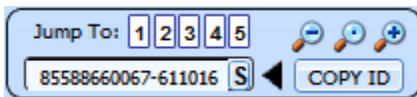
Change phonebook group names

Notice that the provided group names in the Phonebook System only consists of Family, Friends, Business, Cellulars, and Services.

| Family | ☐ | Friends | ☐ | Business | ☐ | Cellulars | ☐ | Services | ☐ |
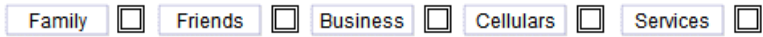
These fields represent the attribute of the Phonebook to group added contacts inside the area. This way, it is easy to just select contacts according to these fields.

These five fields can be changed according to the name of your choice. These are only the fields given by the software as a default.

In order to change or edit the names of these groups, just click on the fields located on top of the group names with check boxes. Automatically, they will be changed.

| Family | Friends | Business | Cellulars | Others |

(Use this screen for contacts that don't need or use the fields in the Contact Screen)
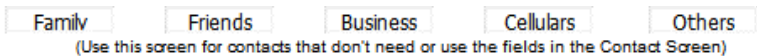
Create new contact based on the phonebook record

Name
Karen Kate   🖑

Notice the hand icon beside the Name field of the phonebook entries list. This icon will create a new contact in the contacts database based on the particular phonebook record.

Add current contact to phonebook
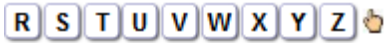
Notice the hand icon at the right side of the Letter buttons. This icon copies the current contact you have from the main screen to the Phonebook area. Once this icon is clicked, the software will automatically add a new phonebook record with the current contact LINKED to it. You will notice that the Linked To field will have a LINKED content.
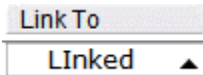
Task List View Manager

The Task List View Manager directly displays the Multi-Task View screen where all clients that an agent have been assigned with a task are shown in a list.

How To Access

Expert View Screen > Contacts tab
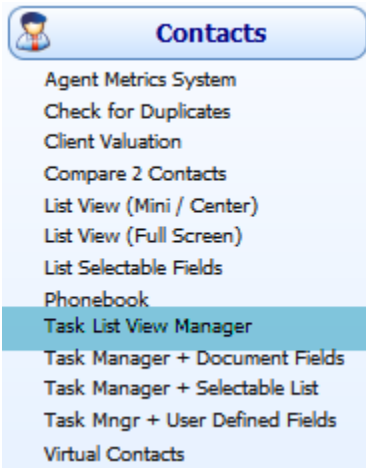
Normally, when you enter in the Task List View Manager, the list will only display the task of the agent to the current client. To display all clients with task assigned to an agent, click the ALL button in the navigation bar of the Task List View Manager screen.
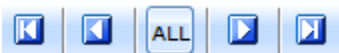
Task Manager + Document Fields

In Task Manager & Document Field, you have the ability to provide extra fields that are specific for documents related to the contact as well as the ability to assign tasks to the contact along with it.

How To Access

Expert View Screen > Contacts tab
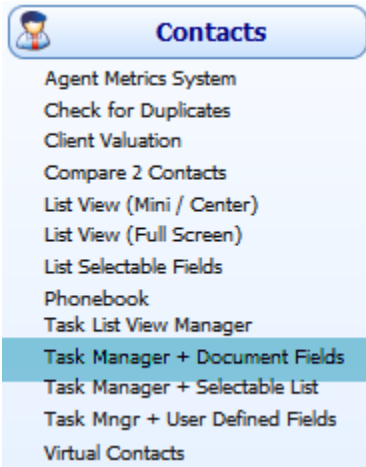
How To Add A Document Entry

At the lower part of the contact information section from the main screen is another area with several tabs. One of the tabs is the DOCUMENTS tab.
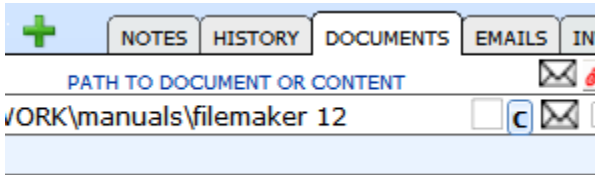
To add a document entry for a particular contact, go to the Documents tab of the contact and click

Then, provide the title or the label of the document in the windows dialog and select whether the document entry is for the current contact or for selected contacts.

Once a new document entry is created, you can then provide other information regarding the entry such as its content or its path directory.

Task Manager + Selectable List

In Task Manager & Selectable Fields of the software, you can synchronize and display contacts on a list based on selected fields as well as assign tasks to given contacts from the list.

In this feature, only two selectable fields are allowed for each information of a particular contact.
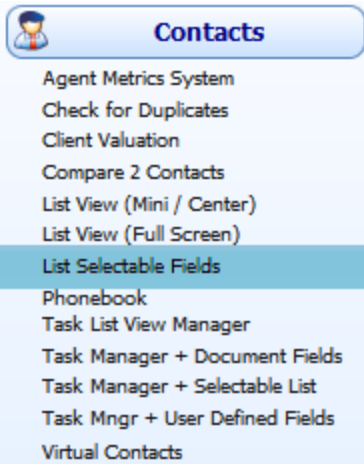
Display contacts using the Selectable List
Select contacts from the list

How To Access

Expert View Screen > Contacts tab
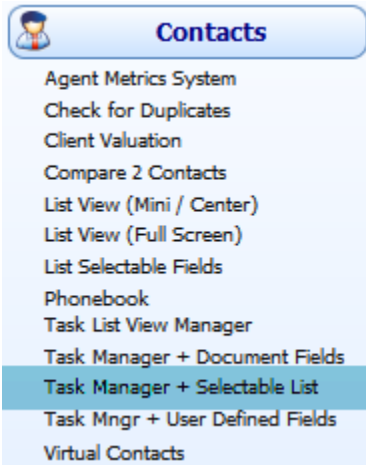
Display contacts using the Selectable List

1. Select contacts to display using the Find button or any ways to select contacts.

2. Click the Click to Synchronize Selected Records button.

3. Notice that there are two drop down selectable fields on every column on the list. On every selectable field, select what contact information that you want to be displayed on the list. It will then automatically show the corresponding information of the contacts on the list.

Select contacts from the list

The contacts displayed in the list selectable fields are usually the ones previously selected. In order to select another set of contacts from the list, here's how:

1. Synchronize the selected contacts by clicking the Click To Synchronize Selected Records button to display the currently selected contacts on the list.

2. Omit the contacts that you do not want to select for you new set of list by clicking the O button of the particular contact on the list.

3. Then, click the Select Contacts in List button to select the newly selected list of contacts.

Virtual Contacts

This option will download from your own domain on the Internet updates of contacts previously uploaded. You can also upload contacts as well as view them.

How To Access

Expert View Screen > Contacts tab
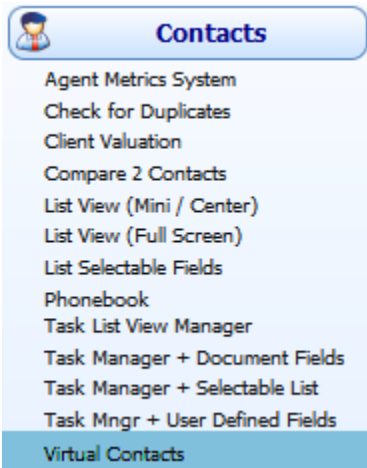
Instant Message System (IMS)

This feature of the software allows clients and agents to conversely send messages to each other instantly. It is similar to instant messengers today but in a more integrated manner because it is built inside the software.

How to invite a contact to the IMS
How to add a contact in the IMS
How to send an instant message to a contact
How to send an instant message to an agent
Create shortcut messages
How to know your Instant Messenger ID

How to invite a contact to the IMS

To be able to communicate with contacts and other parties, it is important to share to them your Instant Messenger ID. This way, they can add you to their own Instant Message System in a compatible software.

1. Click the IM button.

    This button is located at the upper left part of the main screen.

2. In order for the other party to know your Instant Messenger ID, click the Invite button and enter his/her email.

3. The other party will then receive your email. The content of the email will include a number of instructions for him/her to be able to connect with you.

How to add a contact in the IMS

1. In the main screen, select the contact that you want to add in the Instant Message System.

    In case the contact has not been added yet, just click the Add button from the main screen and provided the information in the fields.

2. In the Instant Message System, click the + Contact button.

3. Then a windows dialog will pop up. Provide the Instant Messenger ID in the given text field and click Assign.

How to send an instant message to a contact

1. In the main screen, select the contact that you want to send an instant message to then click the Select Current Contact button inside the IMS.

    SELECT CURRENT CONTACT

    Or you can click the magnifying glass button beside the SEND MESSAGE NOW button. This will let you find automatically the contact. However, it will also detect whether the contact has an Instant Messenger ID so make sure that you are searching for a contact with an ID.

2. Enter the message in the provided text area at the bottom part of the IMS.

3. Click the SEND MESSAGE NOW button.

How to send an instant message to an agent

1. In the IMS, click the drop-down button to select for the agent.
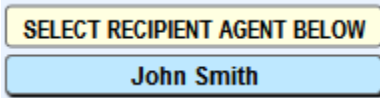
2. Enter the message in the provided text area at the bottom part of the IMS.

3. Click the SEND MESSAGE TO AGENT button.

Create shortcut messages

Shortcut messages are like templates for the messages that you want to send. They are messages that are commonly used in most of your messages. This way, all you have to do is click the shortcut and it will automatically appear on the message text field for you to send.
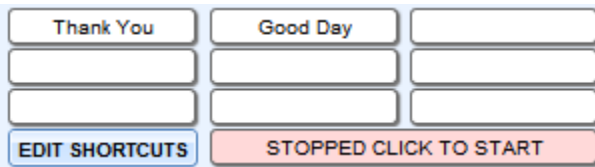
Here's how to create shortcuts:

1. Click the Edit Shortcuts button

2. A windows dialog will pop up. Enter the predefined message in the provided text.

3. Then, click the number where you want to set the message. The numbers are from 1 to 12. The shortcut are numbered horizontally.

   For instance, in the figure above. The first shortcut has a predefined message that is "Thank You". The second shortcut has "Good Day" and so on.

How to know your Instant Messenger ID

Click the Instant Messages System button from the main screen with the SHIFT key. A windows dialog will pop up. Click the SHOW ID button in the windows dialog know your Instant Messenger ID.

Finance Related

Credit Money Machine Net

Account Payables

Account Payables is part of the software where you can control all your payables including the recurring ones and create checks to pay them in just one click. The software also has an integrated commission system with unlimited levels that is triggered when invoices are paid, automatically creating a corresponding entry in Account Payables.

What is a Payable?
A PAYABLE is something that is owed to a person or company and sometimes of recurrent nature that should be paid at a predetermined date. What the Accounts Payable does is to control and manage these payables like salaries, rent or any payments especially payments with recurrent nature so that the payer shall have a reminder of the obligation to pay them.

How to add a payable entry
How to pay a payable entry
Create a check to pay for the payable entry

How To Access

Simple/Advance View Screen > Finance tab

Expert View Screen > Financial tab

How to add a payable entry

1. From the main screen, select contact/s for the payable entry. This contact will serve as the one to be paid of.

2. Click the Add Payable button to create an entry

3. Enter the amount of the payable in the Amount field.

   Total Selected
   Now once an amount is entered, the Total Selected field will automatically be calculated with the total amounts (Paid or Not) of all the payable entries.

   Running Due
   Notice the Running Due information beside every amount info of the payable entries. This keeps you in control of the total amount that is due to be paid. Running Due info depends on the order of the entries in the list which means that it will add the payable amounts that are due to be paid every time a new entry is added.

4. Set the status of payable entry: paid, due, on hold, etc.

5. **Optional**
   Set the Due Date if it has not been paid yet.

6. **Optional**
   Enter a note in the private note field. This step is in case if you have anything to say about the payable entry. This could be useful once the entry is paid.

7. **Optional**

   If the payable is recurrent, check mark the RT column

   Marking the RT button will make the payable entry recurrent. Once marked, provide the frequency on predetermined dates of when the payable must be paid.

How to pay a payable entry

1. Change the status to Paid

   Once the status is changed to Paid, the Date Paid field will automatically be entered with the current date the status was changed.

   Also, notice that the Running Due field of the payable entry that was added last in the list will be deducted with the amount currently paid. However, the Total Selected field will not be changed. This is because it represents the total amounts of all the payable entries of the selected contact regardless of its status.

2. Click of the private notes field / Enter note in the payment notes field

   This is in case you have a description or note written in the private notes that you want to be in the payment notes. Otherwise, enter a different description in the payment notes field. Click to include the current date in the field.

Create a check to pay for the payable entry

Check Memo:

Create Check To Pay For This

➔ | Date | Amount | PMT-# | DOC-#

Related Document # [ ] GO

This option is used if a check was used to pay for the payable entry and must be recorded for history purposes.

Account Receivables

Accounts Receivable, opposite to Accounts Payable, is also part of the software where you can control recurring payments with ease and directly charge credit/debit cards or create a check draft for recurring payments with just one click. You can also create any number of recurring payments over any amount of time.

The receivables are synchronized with the Invoice System, so as soon as an invoice is created, a corresponding entry will be added to Accounts Receivable. Once you set it up, you'll always know what your clients owe you.

What is a Receivable?
A RECEIVABLE is something a person or company owe you and sometimes of recurrent nature that should be paid to you at predetermined dates. What the Accounts Receivable does is control and manage these receivables like salaries, rent or any payments especially payments with recurrent nature so that you will be reminded of the receivables that your clients owe you.

How to add a receivable payment
Receivable Transaction Status

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab

How to add a receivable payment

1. From the main screen, select contact/s for the entry. This contact will serve as the one that you will be receiving the payment from.

2. Click the Add Receivable button to create an entry

3. Enter the amount of the receivable payment in the Amount field.

   Now once an amount is entered, the Total Selected field will automatically be calculated with the total amounts (Paid or Not) of all the receivable entries.

4. Set the status of receivable entry.

5. **Optional**
   Set the Due Date if it has not been paid yet.

6. **Optional**
   Enter a note in the private note field. This step is in case if you have anything to say about the receivable entry.

7. **Optional**
   If the payable is recurrent, check mark the RT column

   Marking the RT button will make the receivable recurrent. Once marked, provide the frequency on predetermined dates of when the receivable must be paid.

Receivable Transaction Status
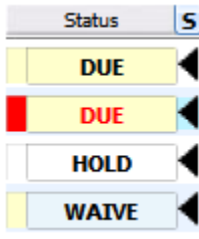
Notice the empty field on the left side of the Status field. This field usually indicates if the receivable entry was declined. Also, it also indicates if the entry's status is DUE and has a payment note that is not empty. In these cases, the field will be highlighted with red as shown in the figure above.

To select and display all receivable entries that has been declined or has a payment note that is not empty with the status DUE, just click on the field with the red highlight. Otherwise, click on the field with no highlight to select for normal entries.

The Invoice System

Our software has a full-featured Invoice System not even found in professional systems. With the Invoice System, you can create both product and services invoices. It also has one-click groups, allowing you to classify your invoices any way you want.

Types of Invoice
How to create an invoice
Creating recurrent invoices
Process recurrent invoices
Making payments to an invoice
Positive and Negative Invoice
The duplicate indicator
Selecting clients for the invoices
Selecting companies for the invoices
Shipping and delivering withing the invoice system
Printing, Emailing, EFaxing, and DocuSigining Invoices
How to find invoices
How to group invoices

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab

Types of Invoice

There are two types of invoices: Invoice Services and Invoice Products.

Invoice Services
This type of invoice is appropriate when you have a user-defined description for your services or products.

Invoice Products
This type of invoice is very appropriate when you have products or services to sell that you could define with a product number.

How to create an invoice

1. Click the Add button

    For first timers, a windows pop up will ask for an initial invoice number. This number cannot be changed later. We suggest 10001 for your first invoice but you can start from any number specially if you're following from a different system and you want to use a different number.

2. Select the type of invoice: Services or Products

3. Enter necessary information in the Description field which is different depending on the type of invoice.

Service invoice description

In order for the calculation of services to function, use the following steps:

Step 1 Put a cost on the first line of the text area. Say, $1000.

Step 2 On the next line, put another cost. Say, $200.

Note that for every number or cost inputted, there should be a money sign (e. g. $) before the number. Also, put a space after every number or at the end of each amount.

Step 3 To calculate the services inputted in the Invoice Description text area, click the CALCULATE button located at the rightmost bottom part of the Invoice Description area. The CALCULATE button can calculate what you put in the service invoice. In this case, it will be $1200.00. For a clear image of where the CALCULATE button is located and the result of the calculated service:

There are different options to calculate the subtotal of the services inputted in the Invoice Description area. It can be a percentage, a deposit or a discount.

Step 4 In the case where the options above are considered such as the discount, another amount will be inputted on the third line. You can type the word discount or any word on it. The important thing to remember is to put the negative sign (-) and the money sign before the amount. In this case, the third line would be -$200(discount).

Invoice Description

```
$1000
$300
-$200  (discount)
```

To calculate the total, click the CALCULATE button wherein the subtotal should be $1000.

CALCULATE	
Subtotal:	$1,100.00
☒ S&H:	0 lbs
☐ Tax:	
Total:	$1,100.00

The calculation from the steps above only calculates the subtotal calculated from the Invoice Description area where service amounts are inputted. In order to get the Total amount, the Freights and the Tax amounts are added together with the subtotal.

The product invoice description

The Product Description area is where you enter the products that you want to create invoice from. This area is solely for products that you could define with a product number from the PRODUCTS & INVENTORY System of the software.

As you can see, the Product Description area is provided with defined list for the list of products. To add a product in the list, just click the Product Code field.

This field will then show a list of available product codes from the Products & Inventory System where you can select. Once a product code is selected, the description, number of stock, and price of the product will be automatically entered in the Product Description field.

While the number of stock is provided, it is easy to enter the quantity of the product to invoice.

Note To show the full detail of the selected product, just click the GO button or the product description field.

Creating recurrent invoices

Recurrent invoices are of big help for big or smaller companies to cater services with invoices that are intended to be created or charged at weekly, monthly or yearly intervals in a certain amount. The Invoice System of this software provides the creation of recurrent invoices. This means that you don't need to create an invoice every time there is a new product or service which also means faster work.

In the Invoice System, you'll see an area at the bottom right of the screen a section that reads Recurrence Information.

1. Create an invoice. Click on the checkbox in the Recurrence Information section (RT) to activate recurrency.

2. Specify the frequency of these recurrences on the second column of the Recurrent Information section right beside the checkbox. The default frequency is once every month. However, any combination will do. This can be done by clicking on the field.

3. Specify how many times or how many additional invoices on the third column of the Recurrent Information section indicated under the +Times label. For instance, if you want to actually produce 6 invoices, you will select 5 since you already have one invoice in plain view.

4. Select the next due date on the fourth column beside +Times. This column is used to give some grace period or something to start.

Process recurrent invoices

To process all the recurrent invoices, click the PROCESS RECURRENTS button right beside the Recurrent Information title.

NOTE that if you click the Process Recurrence button so often, maybe everyday depending how many recurring invoices or clients you have, you will create a recurrent invoice automatically. It will reset the date that will reflect the next one reducing the number of times to create.

The reason that we do it that way and not creating all of them is because in some cases you can have unlimited invoices in a service that you have with an open time - someone that is paying for your services monthly and in principle you don't know if it's going to be with you 5 to 10 years.

Making payments to an invoice

In making payments to an invoice, the invoice must be set to an invoiced status. Hence, the status of the invoice must not be in Quotation or Void. Otherwise, payment to the invoice will not be possible.

Status
INVOICED ◀

Below is the PAYMENT AREA inside the Invoice System where the payment to an invoice is done. The fields for payment are the date, the payment type, the bank account, and the payment description.

Positive and Negative Invoice

Positive and negative invoices are generated when you duplicate invoices.

Positive Invoice
This option means that you are creating an invoice as a duplicate of the invoice that you have currently on site.

Negative Invoice
This option is used when a product needs to be sent back to the inventory. There are cases when clients return some merchandise and products are sent back. This means that the invoice for those products must be refunded. Thus, the negative invoice will refund invoices and adjust the inventory for the products that are sent back and reflect these invoices as a negative invoice.

The duplicate indicator

In duplicating an invoice, you will notice to the right of the Invoice Number in the Invoice System a small field with the letter D. This field is called the Duplicate Indicator. This is to indicate that the invoice in site is a duplicate invoice.

If the invoice is a duplicate of another invoice, the indicator will display 'D'. If the invoice is the original invoice then the indicator will display 'O'. However, if the invoice is both, it will display 'B'.

Note that if you hover to the duplicate indicator field, you will see the different options of how the indicator will be displayed. Pressing the Alt key before hovering on the duplicate indicator field can also help you read the options clearly and much longer.

You can go back and forth to the duplicate and the original invoice just by clicking on that particular letter. That will allow you to know the origin of that particular duplicate invoice.

If you create another duplicate from a duplicate, the duplicate invoice in which another duplicate is created will now be an original duplicate. Thus, this invoice will have the letter B displayed on its duplicate indicator since it is both a duplicate as well as an original invoice itself. Again, if you click on the letter D, you will go back to its original invoice which has now the duplicate indicator B. Now if you click on the letter B, you will go back to its original invoice which has the duplicate indicator O.

Selecting clients for the invoices

When you go from the main screen of the software to the Invoice System, the invoices that will be selected will be the ones from current or selected client that you have from the main screen. That means that all the invoices from that client will be selected automatically and displayed at the rightmost side of the Invoice System. If there is no any invoice from the selected client, that will be empty.

Also, the selected client will be selected automatically for the BILL TO and SHIP TO sections of the Invoice System (see image below).

On the other hand, to select for other clients, the Find Client beside the Client field is provided. Clicking this button will allow you to search for a client through a windows dialog.

Note In the case where the client entered in the search field has more than one search results, you will be presented with the Contacts Found List screen where you can select the specific client you wanted to replace in the Invoice System's currently selected client.
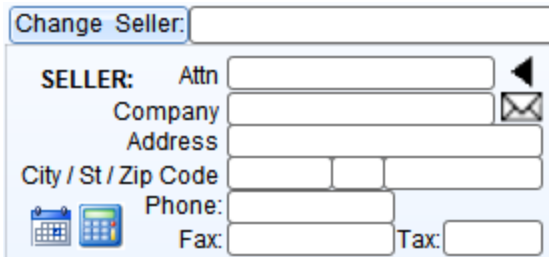
You can also navigate for selected clients using the navigation buttons located at the upper right corner of the SHIP TO section.

Once you have selected a client to replace the currently selected client, click the Use This Client button. This will then automatically replace the information inside the SHIP TO and BILL TO sections of the previous client with the new selected one.

Selecting companies for the invoices

The company that you had selected as default in the Setup section will be selected as the seller in the SELLER section automatically (see image below). If you want to change the company that is the seller to this invoice, you can click the Change Seller button at the top left of the particular section.

Once the Change Seller button is clicked, the Setup section of the program will be displayed where you can add or select a different company. By clicking the ASSIGNED CURRENT AS THE DEFAULT COMPANY button, you can select a different company for this particular invoice.

Shipping and delivering withing the invoice system

The Tracking Number

Inside the TRACKING NUMBER field, you can enter practically any field from UPS, Federal Express, etc. Automatically, when you click the red action button on the right side of the field, the tracking number will be searched on the internet. That way, you will know the status of the tracking number which works for the majority of companies.

Shipment and delivery information fields

Ship Cost

The shipping cost can be entered in two ways: automatically or manually. Basically, if you input manually you can enter the shipping cost just by typing in the shipping cost field. Also, you can have a table with the different cost based on the zip code. That is if you have a shipping cost list.

In order to create a shipping cost list, press the shift key with the Ship Cost button above the ship cost field. A list named Invoice Delivery Cost will pop-up. You can add a record by clicking on the ADD button.

INVOICE DELIVERY COST

ADD	FIND	CLOSE	🗑

ZIP CODE	TO BE DELIVERED BY	AMOUNT	
① 1234	John Smith	$400.00 ◀	🗑
① 1235	John Smith	$390.00 ◀	🗑

You can then input or add a zip code to the list followed by the agent and the amount. You can even select the agent that is going to deliver the particular product. This is important because you can have different payments for different agents.

Obviously, it is assumed that you have a fixed payment. Remember, this is your cost. This is not what the client pay which is the freight. This is your shipping cost in case that you have your own personnel to send maybe your outsourcing the deliveries to a person and you're paying per delivery which is usually in many cases. In that case, in order to synchronize the ship cost automatically, you will click without shift the ship cost button and if you have in your table one record that matches the zip code.

In the Shipping To field, it will automatically put the cost that number that you had in the list will be entered automatically. When you click the ship cost button, it will enter automatically in the ship cost field.

Delivered
This field is for the delivery date of the merchandise or product. If you click on it, a windows dialog would pop-up with the dates on it where you can select the date the invoice of the merchandise was actually delivered.

Shipping Via

The Shipping Via is the way how you send the package. If you click on it, you will see some defaults such as UPS, Federal Express, Airborne Express, etc. It could even be downloadable if you are selling software for example. You can increase this list by going to the setup.

Under the Setup tab from the main screen of the software, you go to the List Labels. Inside the List Labels, you'll find that there is one list for invoice shipping via. You can modify the selections from the available list and add another selection from the list by manually typing from the list.

Ship Date

This field is used for selecting the ship date of the merchandise to be delivered. Once this field is clicked, a pop-up calendar will display.

Delivery Assigned To Agent

This field is used to assign an agent for the delivery of the merchandise or service.

Note that an agent also serves as an employee. Then, even if you pay per service, you could still add this employee to your agents list in the Agents Privileges inside the Setup Section and select the agent from the list.

Paid

This field is not related to the invoice but only to the delivery of the payment of the shipment of the invoice. So when the agent has been paid, or any other outsource service has been paid, you will mark it as paid. You see that when you do that, it would put a note automatically that the delivery had been marked in the private notes section below the Fields section. The note will remain for auditing purposes so when there is an unchecked paid field later on, there will still have a record of the invoice history.

Terms Of The Invoice

In this field, there are default values in which you can select using the pull-down menu. However, similar to the Shipping Via field, you can also manually change the available list of terms in the List Labels area under the Setup tab from the main screen.

Print Date

For this field to work, the status of the invoice should be 'Invoiced' and not 'Quotation'. A quotation won't trigger or wont fill-in this field automatically. When you want to print an invoice, the printed date will be automatically entered into this field. Also, the agent who printed the invoice will be automatically entered into the Printed by Agent field.

Ad Date

This field is not related to shipping but to the promotion or marketing campaign. However, if you have a date and if this invoice is related to a campaign or marketing campaign, this will be the date of the campaign.

This is ideal to control and to produce certain results per day of how many have you produced in a particular date related to your marketing campaign.

Printing, Emailing, EFaxing, and DocuSigining Invoices

In the Invoice System, you have at the top of the area several icons to email, fax, print or DocuSign your invoices.

Emailing An Invoice

When you email an invoice, you can select from current or selected invoices. The invoice will be created as a PDF and will be attached to the email of the selected client.

Note The logo of the invoice can be set in the setup section in the Company Information and has to be a square.

To view the created PDF of the invoice, you can manually go to the software's directory in your driver and look for the folder named 'pdf'. Inside the folder, look for the Credit Money Machine Net. pdf file.

EFaxing An Invoice
When you E-fax an invoice, you can select from different faxes format. Also, in order to fax an invoice, the fax field has to be present in the client information. In other words, the client must have a fax number.

Printing An Invoice
In order to print an invoice, you can select from the current or from the group of selected invoices. Clicking on the envelope icon will allow you to print on an envelope the date, the name or information of your selected client and company.

DocuSigning An Invoice
In order to use this service in the Invoice System, you will need to enter the URL and the email and password assigned to you by DocuSign from the Internet section of the FTP & Internet related under the Setup tab from the main screen.

How to find invoices

There are two ways in finding invoice entries in the Invoice System. This is in the case when you have thousands of invoice records and finds it hard to navigate them one by one.

One way to find invoices is using the Find button. This is the easiest way to find invoices because of its easy access in the Invoice System screen.

Once you click the Find button, you will be prompted to enter any info about the invoice that you want to find in the Invoice System. Aside from the default options Find from Selected and Find from ALL, other options are also available such as finding the invoice based on the Product and Description, etc.

Another way in finding invoices is using the Find tab located at the right side of the Invoice System screen. This way, you can be particular of the information you will be giving to the software to help you find the invoice that you want.

Once you have entered on the particular fields the information from the invoice that you want to find, you can then click the Find Invoices button.

Also, there are predefined selections of conditional statements at the bottom part of the Find tab.

| LESS THAN |
| LESS THAN OR EQUAL |
| GREATER THAN |
| GREATER THAN OR EQUAL |
| EXACT MATCH (see Tool Tip) |
| RANGE |
| FIELD IS NOT EMPTY |
| TODAY'S DATE |

You can insert the condition on the fields. This way, you can control the invoice that you want to search.

On the other hand, notice that there is also the button that is labeled with CUSTOMERS. This button once clicked, will select all the contacts that have been linked with the invoice entries. Also, you will be directed automatically to the main screen with the selected contacts.

Save Find Queries
To avoid finding frequently searched invoices, you can save them in the Shortcut buttons inside the Find tab.

To do this, enter in the fields the queries of the particular given fields in the Find tab. Then, click the Save To button and click the button of your chosen number where you want to save the shortcut.

To clear a shortcut button with saved queries, just click the Clear To button then the button with the number that you want to clear.

How to group invoices

The Invoice System allows invoices to be grouped based on particular information. Grouped Invoices can be accessed by clicking the GROUPS tab located at the right side the Invoice System screen.
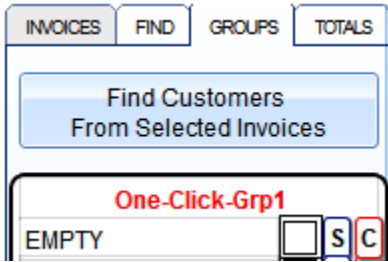
One Click Group 1
One-Click Groups is where you can simply group your invoices with just one click. Under this type of group is a set of checkboxes, S, and C buttons.

The C buttons are used to clear the check-marked groups. The S buttons are used to set the current or selected invoices to the one-click group. You can also directly set the current invoice to a group by clicking on its checkbox.

To select, omit, or expand invoices from selected all the invoices from your database based on the check-marked group, just click on the group name in the list.

Note that the expand option is used to add the selected group to the currently selected group of invoices.

The default name of the groups can be changed inside Setup under the Groups and Fields Labels section.

One The Fly Groups

The On-The-Fly Groups is just similar to the previous One-Click Group. However, in this group you only have four unique groups to choose from. To include the current invoice to one of the on-the-fly groups, just directly mark its checkbox. In the case where you want to include the selected invoices, you can click the check icon and select the Mark option.

To uncheck the selected invoices from the group, click the check icon and select Clear All. In the case where you only want to uncheck the current invoice, just unmark the particular checkbox.

To Do Group

The To-Do Groups allows you to group invoices that are TO DO and invoices that are DONE
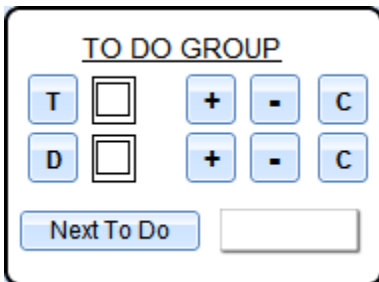
The T button represents the TO DO group while the D button represents the DONE group. To include the current invoice to the TO DO group, just mark the checkbox beside the T button. To include the selected invoices to the TO DO group, just click the + button in line with the T button and click the - button to exclude the selected invoices to the TO DO group.

This is also the same in the DONE group. Once the invoice is done with the assigned task or you have finished transactions with, you can then mark the checkbox beside the D button. If the selected invoices are done, on the other hand, you can click the + button or the - button to exclude them from the DONE group.

To clear the checkmark, click the C button. To select for invoices from the To Do group, you can click the Next To Do button and indicate the number of invoices to select.

Banks & Check Writing

Our software has an integrated check printing utility to print CHECK DRAFTS. You can receive checks by phone or by fax by using a check draft that allows you to deposit a check into your bank account without your client's signature as long as you have a contract with your client that allows you to do that.

How to create a check draft from contact
How to create a check to a contact

How To Access

Simple/Advanced View Screen > Finance tab
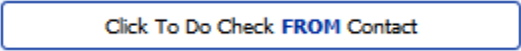
Expert View Screen > Financial tab
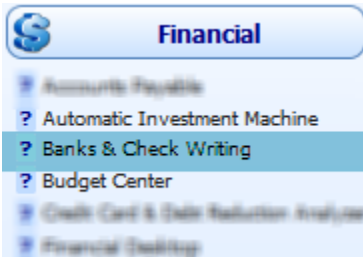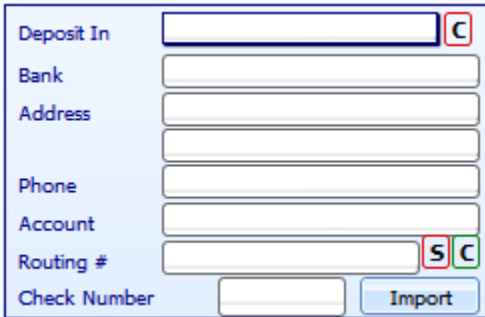
How to create a check draft from contact

To create a check draft to receive from a contact with authorization:

1. Select the contact to receive payment from.

2. Select the company that will receive the payment. To select, go
    back to Setup > Company Information and click the company from
    the list.

3. Click

Click To Do Check **FROM** Contact

    A check draft information fields will then be displayed under the
    clicked button
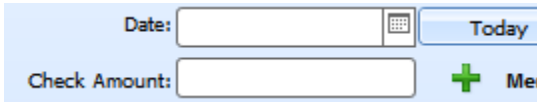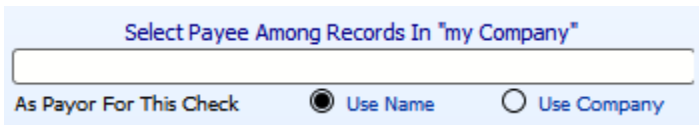
4. Select the bank account of your company in the Deposit In drop
    down field

5. Enter all necessary information such as the bank of the contact, its
    account number, routing #, etc.

6. Enter in the Date field the date that you want to be reflected in the check draft

7. Select what information of your company that will be reflected in the check draft: Name or Company Name
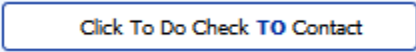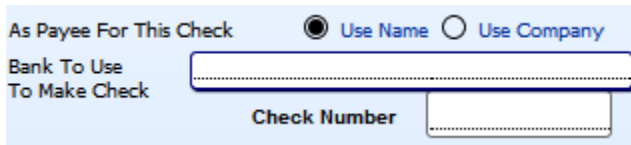
8. Enter the amount of the check draft in the Check Amount field.

9. **Optional**
   Enter the note in the Note field that you want to reflect in the check draft.

10. Click the green plus button beside the Check Amount field OR the **Add Check to Print List** button. This will include your created check draft to the Checks To Print List where you can preview the check draft before printing

How to create a check to a contact

To create a check to pay to a contact:

1. Select the contact to be paid

2. Select the company doing the payment. To select, go back to Setup > Company Information and click the company from the list.

3. Click

   A check info will then be displayed under the clicked button.

4. Select the company information that will be reflected in the check: Name or Company Name

5. Select the bank account to make the check in the drop down field

6. Click the Check Number field. It will automatically enter the check number that is set in the Banks & Credit Card Accounts area of the software.

7. Enter the date in the Date field that will be reflected in the check

8. Enter the amount in the Amount field

9. **Optional**

   Enter the note in the Note field that you want to reflect in the check.

10. Click the green plus button beside the Check Amount field OR the **Add Check to Print List** button. This will include your created check to the Checks To Print List where you can preview the check before printing

Bank & Credit Card Accounts

The Bank and Credit Card Accounts is an area of the software for all bank and credit card accounts used for all areas in the software that deals with bank accounts, credit card accounts, and finance - related transactions.

Add transactions to a bank/cc account
Balance transactions of your bank/cc account

How To Access

Simple/Expert View Screen > Finance tab > Banks & Check Writing

Add transactions to a bank/cc account

Adding transactions to a bank/cc account is essential for recording purposes that you have with your company in your bank account. This way, you can avoid bouncing checks and incurring fees that you don't know about.

To do this:

1. Select a bank/cc account from the list at the right side of the screen by clicking the account.

2. Click the the Register Screen button.

3. In the Bank's Register Area, you can then add transactions such as adding a check, a deposit, a credit note, and a debit note.

Balance transactions of your bank/cc account

In order to ensure that the transactions that you have on your bank accounts in the Bank's Register area match the bank's records.

The software provides the **Reconciliation System** helps ensure that the cash taken out from an account is equal to the cash actually spent. This is helpful in a way to know that cash is not stolen from your business as well as it serves as a means of identifying and fixing errors on account statements.

To balance or reconcile transactions of your bank/cc acount:

1. Select a bank/cc account

2. Click the Register Screen button

3. In the Bank's Register Area, click the Reconciliation System button
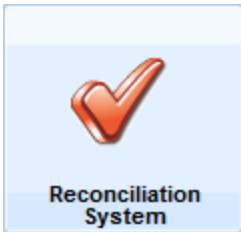
4. In the Reconciliation System, you will see the same list of transactions that you have from the Register Area.

    Check mark the transction that reconciles or that matches in your bank statement.

    Note that there is a suggestion box in the Reconciliation System that will help you know what transactions must be cleared.

5. If you are satisfied with the reconciliation that you made to the transactions, click the CLICK HERE TO POST STATEMENT button.
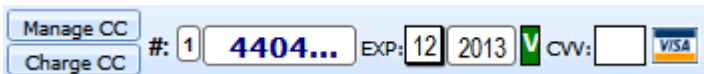
6. Once the button is clicked, you will be directed back to the Bank's Register Area.

   Notice that all transactions that has been reconciled are marked with C under the P column. The P column represents posted bank statements. If the transaction is marked with C, it means it has been cleared.
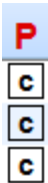
Card Manager

Inside the Basic Information area of the EXPERT View there is a Manage CC button together with its CC # field or the credit card number field, expiration date field, and security code field. This is where you enter the contact's credit card information.

This credit card information will also be used in the Account Receivables to pay for charges by clicking the Charge CC button. If the contact has more than one credit card, you can click on the Manage CC button to add more credit cards to the current contact as shown in the figure below which in turn can be selected in the Account Receivables to pay for charges.

This feature can also be accessed under the Finance tab.

Merchant Manager

Merchant Account Manager is part of the software that allows you to accept payment by credit or debit cards through the use of the gateway system.

The Gateway System is a simple and unique way to interact with your internet merchant account from the software without having to retype anything. It works with all internet merchant gateways that allow the user of an HTTP form (those include Linkpoint Central, Network Merchants, Dow Commence, Pay Simple, Plug n Pay, and more). ACH through Vanco Services is also provided.

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab
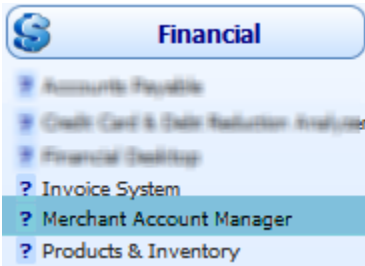
How to add a gateway entry

1. Click the Add button

2. Enter the name of the gateway entry in the Gateway Selected field.

3. **Optional**
   Enter the discount rate

4. Enter the url of the gateway entry in the Gateway URL field

5. The names of of gateway fields are provided by your gateway company. Match those fields with the fields in the software.

6. Select the bank account in the To Bank drop down field where the payment will be deposited

Financial Desktop

Financial Desktop is used to view all your finance-related information all on one screen such as the status of the company related to Receivables, Payables, Invoices, Bank Balances and Products sold in a specific Range of Dates. It uses several graphics to provide deep overarching analysis to your company's financial situation.

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab
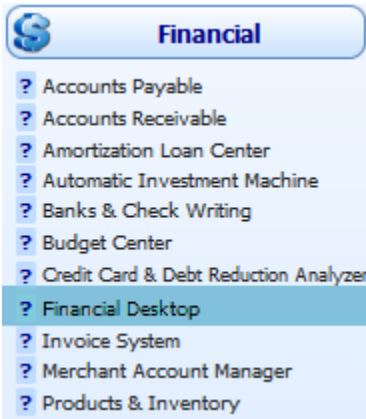
Credit Card & Debt Reduction Analyzer

Credit Card & Debt Reduction Analyzer of the software is used to help you determine which credit card or debt you should pay off first to either optimize your credit score or to save money. It is not intended as a map on paying off your debt. However, it provides you with information based on how you decide on how you want to attach on paying off your debts.

Create a credit/debt entry
Which entry should be paid first?
Set debt/credit card entries as paid

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab

Create a credit/debt entry

1. Click the Add Credit Card/Debt button

2. Enter the information of the entry such as its card number, type, creditor, etc.

3. **Optional**
    Enter notes for the entry in the first text area column. Click the green button to include the current date.

    In the figure below, the note is automatically entered by the software once the entry is paid. You can however have additional notes in the text area.

    07/28/2013 03:29:55 PM SUN -
    AGENT BALANCE ON: 7/31/2013 $.00
    PAID: $1,500.00

Which entry should be paid first?

Note that you need to pay the ones at the top first.

Analyze To
Improve Score

Analyze For
Debt Reduction
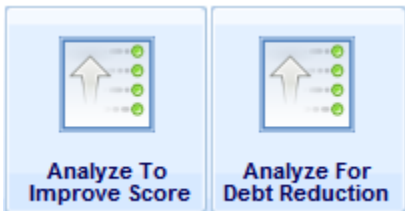
You can use the sort buttons of the Credit Card & Debt Reduction Analyzer to control which ones to be paid first. You can sort the credit card/debt entries to be paid first to either improve your score or to save money. The Credit Card & Debt Reduction Analyzer will then do the job to analyze the credit card/debt entry list.

Set debt/credit card entries as paid

If the debt or credit has been paid, you can set its entry in the CC/Debt Analyzer as paid using the Apply Payments button.

The amount of payment that will reflect in the Notes field will be based on the amount entered inside the I WILL PAY field.

Budget Center

Budget Center is part of the software that is used to manage your budget with a powerful module that includes informative graphics to show you where most of your money is coming from and to. It is where you can enter all your income and expenses and know how far you are away from your ideal ratios.

   How to add a budget entry
   Navigate budget entries

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab
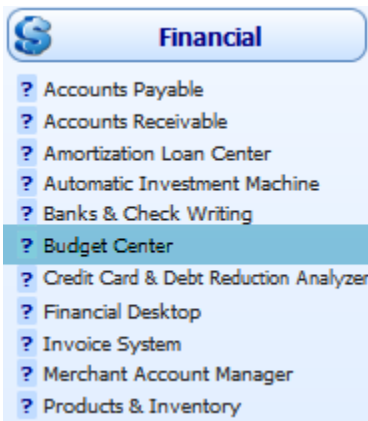
How to add a budget entry

1. From the main screen, select a contact to whom the budget is for.

2. In the Budget Center screen, click the Add Budget button.

3. Enter the description of the budget entry in the Description field.

4. Provide the necessary budget expenses on the given fields.

5. Click the white blank space at the center of the screen to display the info graph of your budget entry as shown in the figure below.
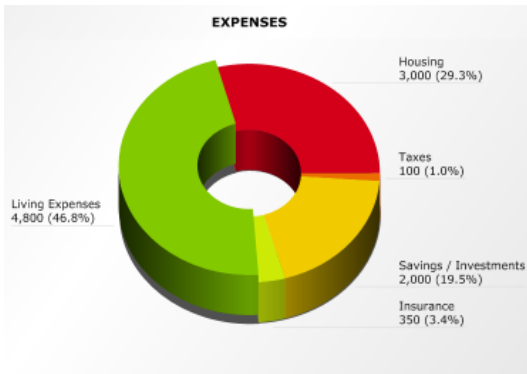
Navigate budget entries

Since the Budget Center screen is set out to only one particular entry, you can navigate the other budget entries using the navigation bar located at the top of the screen.
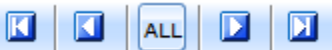
Amortization Loan Center

The Amortization Loan Center is part of the software that is used to calculate different scenarios for every possible loan, including extra payments both recurring and discrete. It is also where you can create, manage and analyze unlimited loan amortization scenarios to evaluate which one would be most convenient to you.

How to create a loan scenario
How to link a contact to a loan entry
More Complex Fields

How To Access

Simple/Advanced View Screen > Finance tab

Expert View Screen > Financial tab
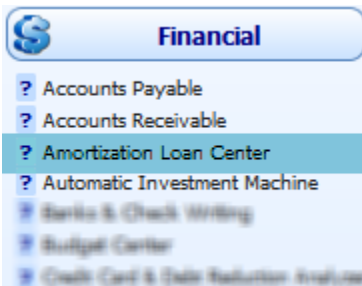
How to create a loan scenario

1. Click the Add button

2. Enter the title of the entry in the Description field

3. For basic information on the entry, enter the amount, terms, interest rate etc under the Simple tab

4. For extra payments, go to the Multiple or Accelerated tab.

5. After all required fields are entered, click the **Recalculate** button. This will create a list of payments that you have to pay depending on the terms you inputted.

6. *Optional* To include a small note for the loan entry, there is a Note field at the bottom of the information fields inside the Multiple tab.

How to link a contact to a loan entry

1. Select a contact from the main screen.

    Note that the contact that is currently displayed in the main screen is the one considered as the selected contact inside the Amortization Loan Center.

2. Select the loan entry to be linked with the contact. To do this, click the selected entry from list of entries.

3. Click the Link/Unlink button.

More Complex Fields

PMT					
PMT	[ ] [ ]	○ Month ○ Year ○ Day-360 ○ Day-365	Until Month: [ ]
PMT	[ ] [ ]	○ Month ○ Year ○ Day-360 ○ Day-365	Until Month: [ ]
PMT	[ ] [ ]	○ Month ○ Year ○ Day-360 ○ Day-365	Until Month: [ ]
PMT	[ ] [ ]	○ Month ○ Year ○ Day-360 ○ Day-365	Until Month: [ ]
PMT	[ ] [ ]	○ Month ○ Year ○ Day-360 ○ Day-365	Until Month: [ ]
PMT	[ ] [ ]	○ Month ○ Year ○ Day-360 ○ Day-365	Until Month: [ ]

Under the Multiple tab is a table of more extra fields for the created loan scenario.

In these fields, more complex calculations are possible, like having up to 6 different periods with different rates. For example, it is possible to calculate an amortization whose first 5 years (60 months) have an interest rate of 5% and then the next 10 years (120 months) 4% and then the next 15 years (180 months) 3%.

Assigning Commissions To Your Sales People And Affiliates

The section covers the commissions your affiliates or sales people can get everytime there is a transaction. The steps provided below is done in the Basic Contact Information section from the main screen.

Set contact as an sales person/affiliate

1. Tag the contact as a sales person/affiliate by clicking the button as shown below.
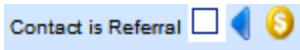
2. A windows dialog will be displayed. In this case, select TAG.

Assign commission to a sales person

Once a contact has been set as a sales person, if any of the other contacts in the software has made a sale or any sales-commission-transaction, the sales person should be given a commission for this endeavor.

To do this:

1. Set all contacts that is assigned to a sales person by selecting the sales person in their Sales Source field.

Sales Source Portia Mcfann - Beachcomber Realty

2. Set the commission that will be shared by the contact to the Sales Person. Do this in the commission field under the Sales Source.

Commission **10%**

You can type either an integer or a percentage that you want to assign to this sales person in the commission field.

In other words, if you want to assign a sales person 5% of all the sales of the particular contact then you will type in the commission field 0.05. If you want to assign a fixed amount, then you will type that amount as long as it is larger than one.

Numbers that are lower than 1 are considered percentages and larger than 1 are considered fixed amounts.

3. Enter the level of the sales person for the commission. At the right of the Commission field is the **Level field**. This level represents the number of levels you want to trigger when assigning automatic commissions. It is possible in principle to have unlimited fields to assign.

For example a manager can be the sales person of their sales force and receive a 10% on all sales while the actual sales person can receive 20% on the sale. In that case, maybe you will like to assign a level 2 to this particular client indicating that not only the first level which is the sales person but also the manager that will get a commission if those two levels exist. So it is very simple once you know how to do it.

Display downline list

A Downline list is a list of contacts that has the Sales Source selected. To display the down line list of a current Sales Source, just click on the yellow dollar sign button.

There is also the same yellow dollar sign beside the current contact's name that when clicked, will display the down line list of that current contact. This is the case if the current contact is actually assigned as a Sales Source.

This way, you can have all the contacts that the Sales Source has commissions to in a list.

Automatic Investment Machine

The Automatic Investment Machine is used to implement and manage the Automatic Investment Management method as taught by Mr. Robert Lichello in his best seller "How to Make $1,000,000 in the Stock Market Automatically".

Note that if you don't have the book yet, we suggest you to buy it to understand the system properly. You can get it at www.amazon.com. Please read this short manual carefully otherwise you won't take advantage of the many options in the AIM program.

Creating Portfolios and Stocks
Transaction Information
How is it calculated?
Transaction & Quote History Area
Analyze stocks for a portfolio

How To Access

Expert View Screen > Financial tab
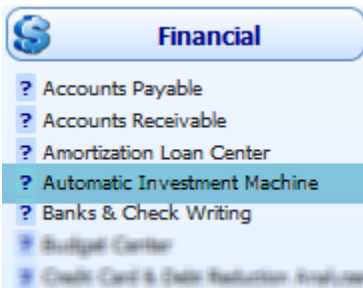
Creating Portfolios and Stocks

1. The first thing you'll do in the A. I. M Program is to create a Portfolio. To this end, click the Portfolios tab.

2. Click the Add Portfolio button. A new Portfolio will be created once it is clicked. Note that you CAN'T change the Portfolio name at this time.

3. Now click the STOCKS Tab and click on Add Transaction.

4. A new line will be created and now you can modify the Portfolio Name if you want. To do this, just enter the portfolio name in the Selected Portfolio field.

Select Portfolio	REPLACE WITH PORTFOLIO		
Selected Portfolio	REPLACE WITH PORTFOLIO		
Initial Investment	$10,000	AIM P/L	-$10,000
SAFE BUY %	10%	SELL %	10%
BUY & HOLD PROFIT / LOSS			

5. Please notice that by default a Portfolio with $10,000 Initial Investment is created with 10% SAFE and 50% Cash Reserve as advised by Mr. Lichello in his book. All those parameter can be modified.

Transaction Information

Time And Date
The first two fields are the date and time fields. The time and date are only for control purposes.

Symbol
This field is used for the name of the particular transaction or portfolio. You can enter any symbol in the symbol field something to represent the transaction.

G Button And Shared Price
To the right of the Symbol field is the G - button in which you can get the last trade of the current stock where in you will be asked either to replace the current shared price with the last price or to add it to the last price. This new price will be entered automatically in the Shared Price field.

Once the G button is clicked, all the other fields will also be automatically filled in for records that are first added on the Analysis Screen Table base on the 10% on the Safe parameters, 50% on the Cash Reserve parameter and $10,000 on the Initial Investment.

Shares Owned, Portfolio Control (P. Control), Cash Value, Stock Value
On the right of the Shares Owned fields are the default values for first time added records which are $5,000 in the Portfolio Control fields, $5000 in the Stock Value and the difference goes into the Cash Value which is in this case 50%. The Shares Owned field is based on these fields mentioned.

Fees

In the Fees field, you could enter the fees what your stock broker charged you for this trade. There is a way to calculate these fees automatically if you entered them using the SETUP FEES CALCULATION BUTTON at the top of the screen in the Stocks tab. Note that if you are going to enter any fees, always include a minus sign.

Interest And Dividence (Int/Div)

The next fields after the fees are the interest and dividend that is going to the cash account automatically. You should enter them there so fees, interest and dividend will be added or subtracted from the Cash Value.

Stock Cash

The Stock + Cash field is the total value of your stock and your cash.

Advise $ B/S

This field is automatically calculated depending on the value and basically the system itself.

Send This, C, And O Buttons

The Send This button is used to send a particular portfolio or record to the transaction area. The C button is used to clear the field at the left from the current one to the end of the list while the O button is used to omit the transaction entry.

How is it calculated?

(After the adding a record or transaction for the first time)

Click the Add Transaction icon creating two lines under the columns. The Share Price of the first line would be copied automatically to the Share Price fields of the new line. If we click the Recalculate icon at the top right, we will see that we will have the same number copied.

In the second line, you will probably see or maybe not the depending on the shared price and other factors, you will see a small discrepancy in the Stock Value. Note that this is not an error.

For now, in order to trigger something meaningful, we are going to change the Shared Price field of the second line to a very low rate which is $10, and $20 on the first line. You will see a green advice of a certain amount. In the example it's going to be different.

In the case that you accept this advice, you could do two things. If you don't want to control your transaction inside the AIM, basically you are going to take action and invest the amount of dollars that the system tells you. But in this case, you are going to go to Transactions and Quote History area.

To go there, you need to click on top of the Stocks tab the Transactions and Quote History button for direct access to the area.

Or just click the Send This button from the right of the Advice field. This button will create a limit order in the transaction and quote history an amount that you have invested to use as the order of amount and the number of shares based on the quotation. You can certainly change the amount that is close to this amount.

Also, it's possible that you see more than one line in the transaction and quote history area and that would be some test or other demos that we have included to be shown at the moment.

Transaction & Quote History Area

In order to select only a particular portfolio, click the select portfolio field. You can also do this in the Analysis Area.

The transaction and quote history area actually doesn't any have any influence in the system, it's just a way for you to control, experiment and see the different order that you have placed for all your portfolios to be able to handle them well. In other words, it's not related to the system because it doesn't analyze the system. On the other hand, it allows you to do certain calculation that you normally couldn't do in the Analysis view.

Order Date And Order Time
The first two fields are the order date and order time fields. These work the same as the Analysis area in which the time and date are only for control purposes.

Settle Date
This field is used in case that it's different like when you place a limit order and it's not fulfilled the same date.

Portfolio Name
The portfolio name allows you to move stocks from one portfolio to the other for management control. Notice that when you click on this field, it will display different portfolio that you can select. Also, there is an R button at the right side of this column. This button is used to replace the current portfolio to selected portfolios.

Symbol

This field is used for the symbol name of the particular portfolio. You can enter any symbol in the symbol field something to represent the transaction. Also notice the R button at the right side of this column. This button is used to replace the current symbol to selected portfolios.

This is in case you want to replace the name of the portfolio for several stocks at once. So all the stocks that will be showing in the transaction are will be replaced with the name of the portfolio in one click instead of one by one. To change only one portfolio, click only the one.

The G Button

The G button is used to get the last trade of the current stock. Notice that there are 2 G buttons. The G at the top of the column is different from the G beside the fields in a way that the G button at the top will replace or add quotation all at the same time while the one in every field is particular to a quotation or record.

The Black Arrow

The black arrow is used to filter the current records by the content of the field at the left. Also, clicking the black arrow will give you several options to do with the particular record: Expand, Omit, Find from all, Find from selected.

The O Button

The omit button or O button is used to omit certain transactions or do the opposite and to give focus on other transactions. If you hover the mouse, you have different options to omit. At the top we also have the O for omit that is used to omit multiple records.

Share Price

The Share price speaks for itself. The reason for the question mark is that the share average calculation is based on order that is closed or that is done. Since we still don't have market order, it's a question mark.

Send This Button And Send All Button

The Send This button is used to send the particular portfolio to the Analysis area. The Send All button on the other hand is used to send all the portfolios from the Transaction area to the Analysis area.

Fees And Interest

Then we have the fees and interest that you can enter here. You see to the right is the F button used to calculate potential fees. You can also calculate the fees using the Setup Fees Calculation icon at the top of the screen.

Amount And Shares B/S

This is the amount we see in the order amount and then we see the shares based on our expectation. If it is a limit order, that would be close to true. If it is a market order, we don't know but then we need to adjust once we switch to the done status, we need to enter the right numbers based on the amount commissions and the actual price of the share that will resolve in a certain number of shares.

The C Button

The clear button clears the shares field.

After the clear button, you will see either a B when it's a Buy or an S when it's a Sell or a Q when its quotation or P when it's an order (pending) and F when it's a fail.

The Checkmarks

This is used to mark a record to be selected later using the Groups Tool above its column.

Analyze stocks for a portfolio

The area at the bottom of the Transaction & Quote History area is used to analyze the different stocks for a particular portfolio.

For example, let's say that the system tells you that you need to invest or buy a thousand dollars into a certain portfolio but imagine that that portfolio is comprised of different stocks. The problem with that is that first, you might not be investing the same amount in each portfolio. Second, you might not want to invest the same percentage into each portfolio but you can control all that in here and you can select the different portfolios and assign a percentage that you want to invest which is to be taken from the amount to invest.

Automatically, the system will tell you how many shares or how many dollars you are going to buy in that particular stock and it will also give a multi-stock share price for calculation purposes and analysis purposes into the analysis area by clicking the Add This to Analysis button. The Shares Price represents the share cost of the multiple transactions up to 4 stocks that can be analyzed at the same time.

Products & Inventory

This is part of the software that is used to display your products or items online. Its main function is to sell your products in a way that potential clients can easily show them through the internet without having to go to the store.

This is ideal to display items or products such as used pianos, cars for auto dealers, products on eBay, watches and all kind of jewelries, paintings, perfumes, stamps for stamp collectors, coins for collectors, knives, etc. and organize them in an inventory so as to easily decide for each individual product which one will be available for purchase, for price, or what products to show online or not.

How To Access

Expert View Screen > Financial tab

Creating a Webstore (Showroom)
Contact Us Page Company Information

Creating a Webstore (Showroom)

A web store, also called showroom, is where your products or items are stored in the software which can be displayed online. To setup a web store, click the Web Store Setup button at the top of the Products & Inventory screen.

You will then be directed to the Showroom Setup where you can setup your showroom.

Selecting A Showroom

Before setting up a showroom, be sure to select one of the five numbers that you see in the right section of the Showroom Setup area in order to determine and select at the same time which catalogue you want to work with.

Contact Us Page Company Information

The first thing to do in setting up a showroom is to provide details for the company information. This part of the Showroom Setup is where you will put your Company Name, addresses, Email, Email for Contact Us, Phone, Fax, and Currency.

You don't have to do this if you don't want but this is what will show in the contact page of your showroom. So if you don't want to show that at all, then you don't put anything at all but it's a good way so people can contact you.

For example, an auto-dealer with used cars can take advantage of people going every day to see what's new in their stock and have them contact very easily through there.

FTP coordinates to upload the pages for showroom

This is the most important section of setting up a showroom. FTP stands for File Transfer Protocol. It is essential that these coordinates are correct if you want to upload your showroom on the web.

Catalog Name

Usually, when you click the buttons under the Select Showroom label for the first time, the default Catalog Name would be "Duplicate". However it can be edited. You can enter the showroom name in this field. Let's say we enter, "Showroom".

Host   **IP**

Your hosting company can help you with these parameters if you don't know exactly what to put. You can go to www.godaddy.com and register your own domain.

Let's say that our domain is www.myshowroom.com. Usually, the host IP for such domain would be FTP.myshowroom.com but it can vary. It can be an IP or maybe a different name but in general if you are using a host that is standard, most probably it is FTP. myshowroom. com.

User ID and Password

The user ID is the same user ID that you receive from your hosting company in order to access the control panel of your new domain. The password is also the same. They can also be changed at a later time either in the control panel of your domain but if you do that you need to change them in this software too.

Domain + Dir

The domain and the directory are exactly that. You might want to have your showroom in a different directory than in the root directory of your domain. For example in this particular case, if you don't want to use the root directory, it would be www.myshowroom.com/items or anything. That would be the domain plus directory.

Initial Directory

In the Initial Directory field, you usually need to put a forward slash ("/"), the name of the directory (in our case "items") and another forward slash ("/"). This varies by the hosting company so it is possible that you don't need to put the last forward slash or the first forward slash. Your hosting company can help you with that.

To check if this system works or if these coordinates work is to upload the setup files. To do that, there is a blue arrow at the top of the screen that points up and says Setup Upload. You can click that icon after creating the FTP coordinates and assuming they are correct otherwise it won't work.

There is a little issue here, in some hosting companies they won't let you create directories automatically unlike what we are trying to do here. So, it's possible that it doesn't work because your hosting company does not allow you to create directory automatically. In that case, you need to go and use free FTP program like Filezilla that you can download for free in www.filezilla.org and the coordinates that have you used, you can enter into your website structure and create a directory which has to be exactly the name that you want to use for the showroom. In that case you will create the directory manually and you will click Setup Upload icon again. That will upload the basic files. Still you haven't uploaded all the files that you need but it's the initial thing.

Showroom link labels

This part of the Showroom Setup is where the links for the menus for your showroom are both labeled. The defaults of the link labels are Home, Hot Deals, Products, and Contact Us.

The good thing about this is that you can change these labels and you have the ability to create three more link labels or even delete some of them. You can add links or websites outside the frame and even put HTML contents if you know about it and you can use it to display these pages.

Showroom content area

In order to control what to display on your showroom homepage, this part of the Showroom Setup is provided where you can enter the showroom header picture, logo, the URL of the header picture once clicked, etc.

Note that what you enter into the content footer and content home fields are HTML codes.

Additionally, in the site keywords field you can enter engine optimization for SEO reasons and enter the site keywords that you would like to use. Enter any keywords that are related to the items that you are displaying separated by commas.

Also, regarding the site title and description, the Site title is the title that will be shown at the top of the window when people will see your showroom and a site description that will be seen by search engines like Google. Anyway, we have Google submission utility at the top left of this section.

Main files upload

Once you have entered all the required data, you still need to do one more step to have your initial showroom setup. You need to upload the main files that can be uploaded by the Main Files Upload button at the top of the screen.

It can take a little bit of time because there many files that needs to be uploaded in the basic images etc. Once it is done, it can be shown by clicking the browser icon to the right of the domain plus directory to the right of the screen that will take you to our internal or to your default external browser if you click with shift.

Product details

Date Created And Updated

This is where the date on which the item was created is automatically filled-in by the software. The Updated field is where the date on which the item was last updated is also automatically filled-in. This date cannot be changed but they can be searched.

Code

This is where you enter any code that you want to use to identify the product. This product code will be shown inside your web showroom. So make it reasonably short otherwise there could be a problem in the formatting in the showroom.

Location

This field is where you enter the location of the product or where the product is placed. This is used to know where the item is for certain situations where you have hundreds of items and you have it in different places. This could be sort of a tracking number or a physical place or any other use that you can give as long as it gives the physical location of the product.

Description

This is where you enter the description of the product. You can type whatever you want or type it using HTML codes.

Notice that right beside the description field is a paste button. This button will paste whatever you have in your windows clipboard right into the description field.

Status

The status is an indication of the status of the product whether it is available or not. This data won't affect the use of the showroom but it's going to be used for your information. You can control the display in another characteristic of these products.

Category

The category is important because it will affect the look of the showroom. It automatically groups products under different categories in different links inside the showroom.

Note that in creating a category, make it as short as possible otherwise it might affect the formatting of the showroom.

Specification

The specification as supposed to the description of the product contains the name of the item with a short description. It could be long but it's not a good idea. However it is meant for longer descriptions since it will go under the picture when you are displaying the showroom as supposed to description which will go the upper part. So if you put too much description, it will push the image.

Keywords

The keywords are only related to findings that you do later into your local computer-based web showroom. So you put keywords that are appropriate for you to find a certain product that are similar. You can put more than one keyword and you don't need to separate the keywords by comma. A space is perfectly alright. You can even put unlimited keywords that will help you find items using the searching capabilities in the web showroom.

Selling and purchasing area

Purchasing Area

If the purchasing area is blank, you should click the show button in order to display that area. The reason to have the show and hide buttons in that area is because maybe you will be showing this computer to a friend and you don't want to show your private vendor information.

Selling Area

Your Price Field This field is used if you intend to sell or only display the item with the price. The A button on its left is used if you want to adjust the price of the item. The R button on its right is used if you want to replace the price of selected items.

S&H Field S&H stands for the Shipping and Handling Field. The R button on its right is used to replace shipping and handling fields for selected products.

MSRP Field The manufactured suggested retail price is used in offering your items at a lower price than usual.

Adding images to your showroom

Once the product is created, it is possible to add one image of the product or several images of it to make it more appealing to the public eyes and especially grab attention to the buyers. Although it is important to add images to the product, it is not a must. It can also be possible not to do this.

You can still have no images added to the product and have the description and the code displayed. This is appropriate for certain instances where you have several products that you have imported with an excel file for example.

There are several ways to add an image to your showroom.

The main image at the center of the Products & Inventory screen is by default blank when creating your first product. If you click on it, another window will pop up which can be closed by clicking on the center.

Importing Images

The software has a way to import the image from a folder from your hard drive. Once you click either of the two buttons: Click to Import Large Image button and Click to Import Small Image button, two options will be displayed on how to import the images.

Import Only One Image This option allows you to import only one image for the product/item.

Import from Folder You can import the whole folder to create many products or items with one click. If you have a selection of pictures for all your items and you want to create items based on pictures, you could click the Click to Import Large Image button with this option and you would be able to import all the images inside the folder.

Warning!

These are very extremely powerful options that you need to use carefully since they will import either one image or a hundred or even thousands of images with one click.

The warning is that this will create a new product with each image so if you have several images for one product then the advice would be either to put them in a different folder or you can even use a more sophisticated feature which is to copy and paste the path of those images into the system for additional images up to 6 and you can also add a video.

Import Directly From Camera Remember that these days, majority of the cameras act as a USB memory stick. In other words, you can connect your camera directly into your computer using a USB port and import directly the images from your camera. So it is possible to import either one by one or the whole directory in your camera and create products with one click. Usually, in cases that you have several pictures for only one product, the best way to do that is to click either of the import buttons such as the Click to import large image button and import the most important picture from your camera.

Scan If you have a scanner that is twine-compatible, you will be able to scan an image and put it here. While that could be a good idea, certainly it's not the easiest way so we have this SCAN option with button.

Inside the product zoom picture window

Once the main image area is clicked from the Products & Inventory screen, a window will pop up. This window is called the Product Zoom Picture Window. Inside this window, you can also add and describe images.

Image Description
Another important feature of Products & Inventory is a small description for each of the smaller pictures that you can add. Those descriptions will be there as a tool tip in the showroom.

Once you click on the image from the main screen, there is a small rectangular field on the top left of the pop up window that you can use as an additional description for the small picture on its right and it will show as a tooltip.

In some cases, you will need more than seven pictures probably. That would be very simple in that you will just have to add the same name with the small variation so you can have more pictures with the same product. For example: Camera-Front, Camera-Back, etc. You can have unlimited pictures of the same product as long as it has a different product code.

Image From Your Server

If you have the pictures online, it is also possible to enter those pictures into the system. To import for either the small or large picture, click the red arrow icon on the right side of the URL fields. It is also possible to paste the URL of the image inside the field.

You can use a different picture for the small picture but by default automatically it will have the same picture from the large one.

The refresh button is in case that simply it wouldn't show automatically which is very rare.

Image From Your Windows Clipboard

As you can see at the top of the product zoom picture window, you can also paste the image directly. Notice the image of a man at the top left of the window; it is used to actually paste the actual image that you have in your windows clipboard.

Adding videos to your showroom

To add a video, you need to add a video first in YouTube. When you already have your video uploaded in YouTube, you can then add the video inside the Product Zoom Picture window.

At the bottom of the screen is a text field provided for the Video URL. This is where the actual URL of the video is entered without any additional code. Potentially, it is possible to add other videos that are not in YouTube but in our experience the one in YouTube makes it real nice.

Getting The URL From YouTube
If you go to YouTube and you have a video that you want to include, under the video are buttons containing codes for sharing the video.

Click on the Share button and copy the URL provided below it. Paste this URL to the Video URL text field of the pop up screen.

To check if the video is displaying correctly, click the browser icon right beside the Video URL text field. This video will be displayed in your showroom. The importance of this is you are not taking space and resources from your actual showroom or your hard drive but you are hosting this video in a free service like you YouTube.

Selecting showroom options

At the bottom of the Products & Inventory screen is a list of all the products added from all the showrooms. In this area is where you can manipulate and organize the products.

Code	Description	Order	R	Price	Tax	Weight	Stock	Status	Category	1	2	3	4	5	Hot Deals	Cart Button	Show Price	Show Product	Omit			
P-000002		1		$0.00			0	AVAILABLE		⊠	☐	☐	☐	☐	☐	⊠	⊠	⊠	Omit	☐	☐	🗑
P-000003		2		$0.00			0	AVAILABLE		⊠	☐	☐	☐	☐	☐	⊠	⊠	⊠	Omit	☐	☐	🗑
P-000004		3		$0.00			0	AVAILABLE		⊠	☐	☐	☐	☐	☐	⊠	⊠	⊠	Omit	☐	☐	🗑
P-000005		4		$0.00			0	AVAILABLE		⊠	☐	☐	☐	☐	☐	⊠	⊠	⊠	Omit	☐	☐	🗑
P-000006		5		$0.00			0	AVAILABLE		⊠	☐	☐	☐	☐	☐	⊠	⊠	⊠	Omit	☐	☐	🗑

Code
The Code Column is where the product codes are displayed. The product code is the code that will identify the specific product which will be shown inside your web showroom. Note that you cannot edit the product code in the Code Column. The code can only be edited in the Product Details area just above the columns.

Description
This column is where the description for the products is displayed. This too, like the code column, cannot be edited. It can only be edited in the Product Details area just above the column. It can also be sorted either ascending or descending at the top of the column.

Order
This column cannot be sorted, but you can change the order number which actually influence the order by clicking the R button to the right of the order name and that will lead you to replace with the different number that will affect the order of the current product.

On the other hand, you can just click the order area and change the order number.

Price

The price column is where the prices of the products are displayed.

This can't also be edited unless you go to the Selling part of the Product details area and edit the price of the product there.

Tax

If the product is taxable, the tax column will be marked by a check. The tax column is influenced by the task checkmark in the selling area at the top center.

Weight And Stock

The weight comes from the purchasing area at the top right and the stock that also comes from there.

Status

The status column is where the status of the product is displayed. The status can either be available, back ordered, or discontinued. This column can also be sorted by clicking at the top of the column.

Category

This column is where the category of each product is displayed. This can also be sorted by clicking at the top of the column.

Items in Showroom

Notice the five buttons among the columns.

These five buttons represent the five showrooms containing the products. Once the product is check marked under a certain button, this means that the product belongs to that particular showroom. So it's very easy to understand that the same product can belong to different showrooms.

And also it is very easy to uncheck and to unselect products for a particular showroom. But also if you click in one of those five buttons, you will receive a pop up window where you can select, clear the check marks, or omit the ones that are check marked. From the selection, mark them if you have selected something or sort them.

If the selection option will be equivalent to click in the showroom selected to the center of the screen where you have the five buttons and that will be the same thing.

Hot Deals
This column, if you are using the link/label explained in the setup section, the products/items that you mark here will be displayed additionally in the hot deal section. So if there is something that you want to high light like the offer of the day for example, this could be ideal to select the hot deal and maybe modify the product price which can be done very quickly and put it back the next day.

So by doing that, you can have deal of the day you can change the label in the setup area and have this offer as the deal of the day.

Cart Button
The cart button, as the name implies if you check the cart button, then the car button will be displayed in your showroom which interacts with PayPal. Otherwise it will not be shown and it is ideal to display with or without price. But without letting people to buy your products and this can be done by each product separately. So some of them could be available, could be sold, and others cannot.

Show Price And Show Product

The show price and show item columns show the price of the product as well as the product itself or not by checking or un-checking the checkbox of the product.

Using the showroom as a shopping cart

Optionally, you can use your showroom as a shopping cart. In order to do that, you need two things:

1. One is to have your PayPal email that has to be from a business account so you can receive money in your bank account. Your PayPal account should be entered in the showroom setup in the cart email. The rest, you can leave the same code that comes with the software. To go inside the showroom setup area, click the Web Store Setup icon from the upper left of the Products & Inventory screen.

2. The second is to have the Cart Button column check marked for the products that you want to have a PayPal card button. Obviously, you need to have also the show price because no one will buy without seeing the price and the cart also needs the price for it to work.

Be sure to that you have clicked the Setup Upload in the Showroom Setup in order to upload the setup that contains your PayPal email.

After check marking the Card Button and the Show Price for the item/s that you want to use in your showroom that can be purchased with your PayPal account, be sure to click Web Store upload icon from the Products & Inventory screen to upload the entire showroom in order to make the appropriate changes.

Finding, Searching, and Selecting Products

The Find Button
The most obvious way to search is the Find button at the top of the screen. When you click this button, you can search in the different fields like status, category, groups, etc. Just type anything that you want to find just like the description for example and the records that have those words will be selected automatically.

Also, once you click this button four options are given: Web Store ALL without Images, Web Store All with Images, Quick Find, and Full Find. The options Web Store ALL with or without images can automatically be clicked without having to type any word in the find field since it will find ALL the items/products with or without images.

The Black Arrow
Another way to search is by using the black arrow. The black arrows located at the right side of the several fields in the main screen such as the Dates, Item Code, Status, and Category. It will filter the database by the content of the field on its left.

So for example, if we have a product code and we click the particular black arrow, the product code will be selected automatically. Also if in the list of products, we click the black arrow, it will select all products with the same category.

The A To Z Buttons
Also, you can use the buttons from A to Z that are on top of the lower part of the main screen and is above the code and description columns. These buttons will automatically select the products or items that start by the particular letter selected.

The Omit Buttons

In order to select different products, you can omit them (not delete them) by using the omit button that is present on each line almost at the end of the line. By clicking on it, the product will be omitted that conserve to omit certain products that you want to check or uncheck in the different buttons Hot Deal, Card Button, Show Price, and Show Item.

If you click the omit button with the SHIFT key, the particular product will be selected. In other words, it will omit everything except that product.

Also at the top of the omit buttons column, there is an additional omit button that has an additional functionality that relate to the position of the selected product in the list of products. It will also let you omit above or below that list.

The Check Boxes

Another way to select and mark products is by using the last two check boxes and either checkmark them or not. Using the check mark icons at the top of the buttons, you will find several options that will let you select, clear, or mark those records based on if they are check marked or not.

By combining these techniques, you will have an incredible power to select products and make changes to them. One technique could be if you want to uncheck the Cart Button for a certain category. So instead of going to check each record and uncheck its Cart Button, you could select the whole category with one click by clicking the Cart Button at the top of the column. You could use that button to uncheck the whole category with one click.

Modifying data in bulk

There are several fields that have a capability of making changes in the fields in a fast way. Those fields are the fields on the Products & Inventory screen that have the R button (R for Replace) on their right side. Such fields are the Category field, the Status field, the Price field, the Manufacturer Price field, the Shipping and Handling field, the Taxable field, etc.

With those fields, you can do a selection by finding and selecting the items that you want and then you can replace all of them in bulk.

If you made a mistake, there is no undo feature so you need to be sure of what you are doing otherwise, it can go to undesirable consequences.

Set based on cost and price buttons

In particular, to make changes to the price and in addition to the R buttons, there are two other buttons below the Selling area at the center right of the screen where you can change the price. The price will be displayed in the showroom based on the cost or based on the actual price. In other words, you can either put a percentage or put a positive or negative number.

So for example, if you want to add up a mark-up profit of 30 dollars over your cost, you can click the Set Based on Cost button and put 30 dollars and click either current or selected to make changes to all selected items or just the current product. If you do it this way, it will be extremely easy later on to reduce that amount but in that case you will use the Set Based on Price button.

So in both cases, you can do a lot of combination using percentages or a fixed positive or negative amount and use it to modify in bulk one or hundreds of products with one click.

Uploading a showroom to your server

Assuming that you have done the setup work and tested the setup account and that you have uploaded the setup and the main files as explained from the previous pages, you can upload very easily a showroom just by clicking the Web Store Upload icon in the upper left part of the Products & Inventory screen.

That will upload the selected showroom among the five available with one click. When you click the icon, you will be presented with an option to also upload the images or to just simply to upload the data.

No!
In the case that you upload the showroom with the images too, if the images are not in your hard drive, select the NO option because there is nothing to upload in terms of images. Also, if you have uploaded the images once and you haven't made any changes to those images, select NO because you only need to upload the images one time. You don't need to upload the images every time that you make changes to the data in your showroom.

Yes!

Additionally, if you had made changes to certain images but not all the images, select only those images using the omit buttons, etc. and select the images that you want to upload and say YES. Only those images selected will be uploaded, the rest will stay there so the whole showroom will go correctly even though you have uploaded a few images because this is assuming that you have uploaded all the images previously.

Submitting your showroom to Google

Products & Inventory has an integrated submission button that you can use to submit your website to Google located inside the Showroom setup.

Inside the Showroom setup, select the showroom that you want to use among the 5 showrooms and click the Google submission button and your website will be submitted to Google automatically.

Viewing and printing products as a catalog

Products & Inventory has an integrated viewer where you can see all your items in a catalog format that is used locally in your computer. Just click the View Catalog icon and the item selected will be displayed in your product catalog.

Inside The Products Catalog Area

Once inside the catalog area, you have the option of having a slideshow, email the catalog to your clients, print the catalog in your regular printer or as a PDF with our PDF driver or E-fax the products. You can also select different formats of 9, 4, 2, or 1 per page and a list form to print the catalog. When you use the email option, automatically the PDF printer driver is invoked and it is used to create a PDF attachment as a catalog that you can email or put in a CD to send to your prospects.

Marketing

Credit Money Machine Net

Telemarketing System

The Telemarketing System is a feature of the software that is used to conduct sales in an integrated way. This way, direct marketing services is easy to manage thus, providing you with lesser tasks to do. It also has features every telemarketer needs like the ability to display the client's information as part of the script.

The two layouts
How to add a script
Using the agent and contact fields for the scripts

How To Access

Simple/Advanced View Screen > Marketing tab

Expert View Screen > Marketing & SEO tab

The two layouts

First Layout The first layout is displayed on the main screen.

Second Layout The Second Layout is displaed in another screen inside the software. It can be accessed by clicking the magnifying glass icon from the first layout or beside the Telemarketing button.

For telemarketing professionals, the SECOND LAYOUT is preferred since the script will be viewed in a larger font and the rest of the information are displayed around that big screen. On the other hand, for an occasional use, the previous layout is preferred where you have the main screen.

How to add a script

1. Add a contact or select from the main screen existing contacts. This contact will be used for the script.

   In the event where you haven't added in the software the contact that you want to use for the script, you can add it directly in the Telemarketing System using the Add Contact button located at the top of the Contact Section.

2. Select from the 15 buttons at the top of the telemarketing screen by clicking on it where the script will be saved.

3. Enter the script title in the field provided below the 15 buttons. The field has a predefined REPLACE WITH SCRIPT TITLE text by default. Just delete this and enter the script title.

4. To make sure the script title will not be lost, save it first by clicking the Save Script button.

5. Click Edit Script button

6. Enter the script content in the text area.

    If you don't know how to write a script, we recommend a website area that gives templates and instructions on how to make a successful telemarketing operation which is www. scriptingpower. com.

7. Click Save Script button to save the complete script content.

Using the agent and contact fields for the scripts

One the most powerful feature of the Telemarketing System is the ability to merge fields from a client and the agent that calls or receives the calls inside a script.
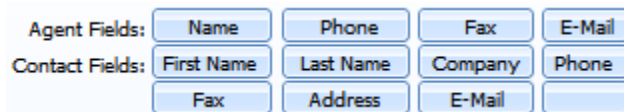
These buttons will insert a symbol in the editable Script Area. For instance, if you are editing a script and you click the Name button from the Agent Fields, the system will insert a symbol that will be replaced with the agent name at the time of reading the script.

Note that each symbols represents what the label of the button indicates. For example, if you click the Name button, the symbol will appear as <<AG-NAME>> that stands for agent name at the time of reading. Once you click the Save Script button, the symbol will change into the name of the agent.

You can access your agent in the Agent Privilege under the Setup tab from the main screen. From there, you can change the information of an agent. This information can be used in the telemarketing script to merge automatically with your text. In this way, you can create your telemarketing script in a very personalized way that will allow you to read it fluently without having to make some changes.

Telemarketing & Business Scripts

While in the Telemarketing System, you can have 15 different scripts represented by the 15 buttons in the area, in the Telemarketing and Business Scripts, you can have unlimited scripts. This way, you won't limit yourself from having several different scripts for your telemarketing or for other purposes. With Telemarketing and Business Scripts, you also have the ability to manage the scripts in a much wider space. Moreover, it is very specific and is made solely for scripts in general.

How To Access

Simple/Advanced View Screen > Marketing tab > Telemarketing System

Expert View Screen > Marketing & SEO tab

Auto Responder or Messenger System

The Auto Messenger System allows you to group email templates together and send them to clients in one click. Emails can be sent out all at once or at predetermined intervals (send this email, wait 2 days before sending the next, wait 3 days before the next, etc.). It can even send messages automatically in response to e-mails processed by the Rules Manager.

How to create a new auto messenger
How to assign an automessenger to contacts
What will happen to automessengers assigned to the contacts

How To Access

Simple/Advanced View Screen > Marketing tab

Expert View Screen > Marketing & SEO tab
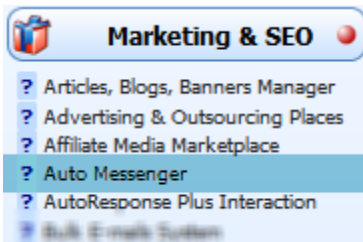
How to create a new auto messenger

1. Select templates from the Template Manager to be used in the Auto Messenger. To do this, mark the first checkbox column of the templates that will be selected.

2. **Optional**
   Click the **Create A New Auto Messenger** button.

   If you have already added an auto messenger, you can just select this auto messenger in the drop down list

3. Add a template for the auto messenger by clicking the **Add New Template to Current Automessenger** button.

4. Once the button is clicked, a list of template snippet will be displayed. Select a template from the list by clicking.

5. Adjust the order of days when the templates of the new auto messenger will be sent in the order column.

6. Set the interval of days the templates must be sent in the Days To Next column. Note that you have to set the initial date first using the **Start Date** calendar on top of the column.

How to assign an automessenger to contacts

1. Select an AutoMessenger

2. Select a contact or contacts using the Contacts section.

3. Click the ADD AUTOMESSENGER TO CURRENT CONTACT button or the ADD AUTOMESENGER TO FOUND CONTACTS button. Click the buttons with shift to remain in the Auto Messenger screen.

What will happen to automessengers assigned to the contacts

Once you have assigned those auto messengers to one or more contacts, the corresponding template will be triggered only when you are receiving emails. Those emails will be queued in the Outbox area in the Send To area of the Email System.

The auto responder will not be sent automatically but will be queued automatically in the Outbox in the Send To area when you are receiving emails. Remember to go to the queue from time to time in order to check if they are already sent.

Moreover, when auto messengers are being prepared automatically by the system, you will see that the auto messenger field becomes red and the check box on its left will be checked automatically.

This is a warning that the auto messengers are being prepared and are being queued in the Email System. If you want to clear an auto messenger of a particular client without going to the Auto Messenger System, you can click the Clear button right beside the Auto Messenger field in the Task Manager Area.
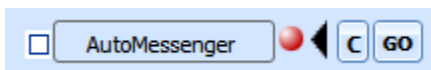
Email System

Our software features an integrated email system as supposed to interaction with the Microsoft Office Outlook or any other software.

One important advantage of this feature is the selection of history of communications. For instance, when you go from a client to an email system, all the emails sent, received and linked by that client are selected automatically. Note that if the client has several emails, they are also included from the selection. All these emails will be taken in consideration automatically by simply going to the email system. This is very important because it will be like having a history of communication with your client in one click at a very high speed.

Add an email account

Where to add signatures

Set directory of where to save incoming file attachments

How to check for new emails of an account

How to filter spam emails using rules

Order of rules

How to filter spam emails using keywords

How to filter spam emails using the From field

Check for emails read, to be read, sent, to send, and deleted

Check for emails in all email accounts

Send all emails in the Outbox

How to compose an email

How to compose an email using a template

How to search emails

By using a regular email system or an email client like Outlook and in order to produce a similar result you would need to do many searches in the inbox and create a directory. The emails would then be segregated to that directory. This is done several times for each one of the email that the person has used including the ones he sent.

Note that by segregating manually, it will be obsolete the very next second because there is a need to frequently repeat the segregation since there is a chance of receiving another email from this client.

How To Access

Simple/Advanced View Screen > Emailing tab

Expert View Screen > Email System tab
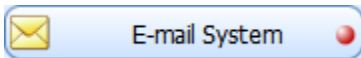
Add an email account

1. Once the email system is accessed, you will be presented with the inbox area.

    In the inbox area, click the **Account Setup** button.

2. There are three types of email account that you can add: a regular email account (e.g. Yahoo), a Gmail account, and a GoDaddy account.

    Add Gmail Account
    If you want to add a Gmail account, the program will automatically ask you for your Gmail account and password and it will create automatically an account with the right words.

    Remember that in order to use a Gmail account with our assistance, you need to change in your Gmail control panel the POP 3 to use an external POP 3. You go to your Gmail account and go to the setup that will allow you to use an external POP 3 clients like ours.

    Add GoDaddy Account
    Adding a GoDaddy Account is similar to adding a Gmail Account. All you have to do is provide your GoDaddy email address and the password to it. Automatically, the Email System will create an account with your GoDaddy account and filling up provided information fields.

3. Provide the email account main information

Note that this step is optional for Gmail and GoDaddy accounts. There is no need to fill up this information since they are automatically provided by Gmail or GoDaddy using the system.

On the other hand, if you have added other email accounts aside from Gmail and GoDaddy, you have to enter the main information of the particular email account.

Full Name to be seen
This field is where the name the client will see when receiving an email from you.

Email Address
This field is where the actual email address is entered.

POP Server
This field is where the actual POP server is entered. Usually a mail. domain_name is entered, but it could be something else.

Pref. POP Auth.
By default, LOGIN is entered in this field.

POP User Name
Usually, your email is entered in this field. Be sure that it is in lower case.

SMTP Server
Usually, what is entered in this field is the same as what is entered in the pop server such as smpt. domain_name.

| SMTP User Name |
| SMTP Password |

Sometimes, you don't need to do the SMTP server username or SMTP server password. You could leave it blank.

| Pref. SMTP Auth. |

There are cases that your account requires SMTP authentication. In that case, at the bottom left of the Email System Area, check mark the label that reads 'THIS SERVER REQUIRES SMTP AUTHENTICATION TO SEND MAIL'.

If you click on it, the username and password from the POP server will be copied automatically into the SMTP server.

Note that this is the correct way to do it. While many other configuration are possible in terms of different ports for SMTP or even for pop server supports, this is the most common configuration and it should work 99% of the cases.

4. Provide the email account default information

The default information is optional. You can actually skip this step if you will not use default signature, attachments, subject, or group when you send an email.

| Default Signature |

This field is where you enter the signature that you want to use when sending an account. You can have different signatures, actually you can have unlimited signatures but only one could be the default for a particular email account.

Note that filling up the default signature field is not really necessary. In the case that you want to enter a default signature field, you could create your signatures by clicking the signatures button at the top right of the Accounts Setup screen and fill in the blanks as appropriate. Then you will select what is the default signature that you want for this particular email account.

Default Attachments

Usually, filling-up the default attachment field is not a good idea. However, it could be possible that you have default attachment for a particular email account that is going to be used for a very specific purpose.

Default Subject

It is also not a good idea to fill this field up unless in very specific cases.

5. Enter account description and receiver information to distinguish the particular email account from the others.

Private Description

This field is where you specify a unique account description. Put a name in the private description that can only be seen by you. The description can be a personal email or maybe from a certain support department.

Will Be Received By:

This is the field where you put the name of the agent that will receive the email. An agent can be the recipient of unlimited email accounts, so you can have a department, or a person who is an employed agent that will receive different emails.

Note that you can only have one default to send. You can use unlimited accounts to send but only one would be the default which is the one suggested. Still, that suggestion can be changed for any other accounts if you have the rights to do so.

6. Test your email account if they can receive or send email messages. To do this, click on either of Test Send or Test Receiver buttons.

TEST
RECEIVE

TEST
SEND
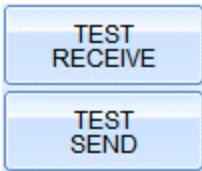
Where to add signatures

Email Signatures contain your contact details such as your Job Title and the name of your company. This will give the recipient more information of who wrote the email.

To add default signatures:

1. Go to the Accounts Setup

2. Click the **Signatures** button at the right side of the setup area

3. In the Signatures screen, click the Add Signature button.

4. Provide a unique title or description of the signature entry in the Description field.

5. Enter the Signature in the Signature text area. This text area is big in order to provide you with a wide space in anything that you would like your signature to be.

Set directory of where to save incoming file attachments

1. Go to the Accounts Setup

2. Click the **Other Options** button at the right side of the setup area

3. In the Email Account Options (Other Options), enter in the **Save Incoming File Attachments To** field the path in your hard drive where you want to automatically save the attachments of your received emails. To save time, you can click the import button to directly locate that path.

How to check for new emails of an account

There are two ways to check for new emails of a particular account. One is by directly checking emails out without going inside the Email System. Second is by going inside the Email System.

Directly check for emails
Notice the red button beside the Email System button. This button will directly download or check for new messages in the email you set as default in the Accounts Setup of the Email System.

Check for emails inside the Email System

1. In the email system inbox area, click the Accounts Setup button.

2. Select the account that you want to check for emails. To select, use the navigation bar.

3. Click the Receive Emails button that is located at the right side of the Accounts Setup screen.

   A download windows dialog will then be loading for emails of the account.
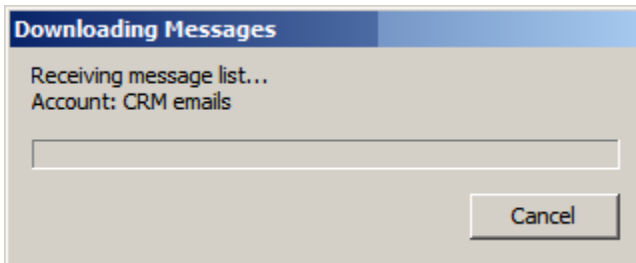
How to filter spam emails using rules

What is a rule?

A rule is the action of how receiving emails will be given action based on the description of the specified email created by the rule. The Rules Manager is used to produce some actions automatically upon receiving particular emails in the Email System. It can be accessed directly from the icon at the top of the Email System.

To filter particular emails and spams using rules:

1. Click the Add Rule button to create a new rule

2. In the Description field, enter the title of this new rule

3. Filter the emails that contains a particular FROM, TO, SUBJECT, and MESSAGE information by entering them in the provided fields
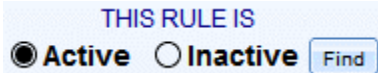
4. Provide the necessary actions such as the template to be used as a response when receiving spams or filtered emails, etc.

5. Set this rule whether you want it Active or Not.

Note that rules need to be perfectly created to avoid mistakes. To do this, you can have some rules set as inactive until you have perfected or analyzed the possible results of the rule. Once the rule is done perfectly, you can set it back as active.

6. In the case where the rule you created is set as Active, then click the **APPLY RULE NOW** button. Applying the rule means that it will then be used when emails are received using the software.

Order of rules

The order of rules is important for a fact that if an email is processed by a rule, it will not be available for the next rule. Note that only one rule can be applied to a certain email.

In order to change the order, you need to go to the LIST VIEW with the icon provided at the top of the screen of the Rules Manager.

At the center of the List View area are four buttons: move top, move up, move down and move bottom.

Note that the rule that you are currently on that is identified by the black vertical line at the far left of the screen can be moved up or down, bottom or top. This will put the order that you want for rules that will potentially trigger the same email.

How to filter spam emails using keywords

While the Email System can filter spams using a set of rules and can eventually respond to them, you can also filter spams just using a set of predefined keywords detected in the email subject.

Here's how:

1. In the Inbox area, click the **Spam Filter** button. This is located at the right side of the screen.

2. A windows dialog will pop up allowing you to select for Keywords or for Filter. Select **Keywords**.

3. The Spam Filter screen will then be displayed. On it, click the **Add** button.

4. Enter the keywords in the provided field that will be used to filter the incoming emails.

5. Mark the Subject Keyword check box if you only want to use the keyword to filter the Subject field of the email.

   Do not mark the check box if you want to use the keyword to filter the Subject, To, and From fields of the incoming emails.

6. **Optional**
   Mark the Exclude checkbox of the keywords to be excluded in the list that you do not want to filter just yet.

7. Close the Spam Filter screen by clicking the Close button.

8. Going back to the Inbox screen, click the Spam Filter button once more. This time, select **Filter**. This will filter your current emails in the inbox screen based on the list of keywords you have in the Spam Filter.

How to filter spam emails using the From field

In the inbox area, the list of emails are displayed. In the list, there is a From column where the sender of the particular email is located.

You can use this field to filter emails. To do this, just click the selected sender. Once clicked, a windows dialog will be displayed allowing you to select what to include in the Spam list.

```
1 - Copy main email to your Windows Clipboard
2 - Add this email to the Spam List (shortcut SHIFT)
3 - Add this Domain to the Spam List (shortcut SHIFT+CONTROL)
4 - Exclude this Email in the Spam List (shortcut SHIFT+CONTROL+ALT)
5 - Add this EMail to the Bulk E-mail System (shortcut CONTROL+ALT
6 - Add this email to the Current Contact
```

Check for emails read, to be read, sent, to send, and deleted

When you access the Email System, you will be directed to the Inbox Area. At the top of the inbox screen, you can find the Emails To Read, Emails Read, Emails Sent, Emails To Send, and Emails Deleted button.

Check for emails in all email accounts

While you can check for emails of a particular account by going to the Accounts Setup, you can also check for emails not just on one particular account but from ALL accounts that you have added in the Email System. To do this, click the Receive all button in the Inbox Area.

Send all emails in the Outbox

When you have emails stuck in the outbox and are waiting to be sent, you can automatically do them without having to go to the Outbox and send them one by one. You can do them all at once by clicking the Send All button in the Inbox area.

How to compose an email

1. **Optional**
   Select a contact to be used in composing an email. The contact can either be the recipient of the email or will be used in the template.

2. In the From field, select the email account to be used as a sender of the email.

3. Enter the email address in the To field. To enter several emails, just put a comma after every email.

4. **Optional**
   If there is a file included in the email, enter the URL path of the file or click the import button in the Attachments field.

5. Enter the subject of the email in the Subject field.

6. Enter the content of the email inside the text area below the Subject field.

To use the information such as the First Name, Phone, etc of the selected contact. Put the cursor in the area where you want to input the information and click the button of your choice of the Contact. This is also the same with the Agent information using the given buttons.

John Smith		Name	Position	Phone
Contact's Fields		First Name	Last Name	Company

7. Once the email composed is ready to be sent, click the **Send This Email Now** button.

How to compose an email using a template

1. In the Template Manager, mark the first checkbox of the particular template to be used in composing the email.

   This will allow the template to be included in the list of templates inside the Email System that can be used as a response or for new emails.

2. Select a contact

3. Inside the Email System, add the Compose Email button.

4. Select either Instant or Normal.

5. Select the email account to use as a sender of the email in the From field.

6. Enter the email address of the recipient in the To field. To enter several emails, just put a comma after every email.

7. Inside the Compose Instant/Normal Email screen, there is a Use Template field. Select the template using the dropdown field.

Use Template: | How To Embed A Youtube Video | Insert
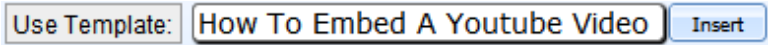
8. Click the Insert button.

9. The content of the template will then be inserted in the text area of the email. You can add additional information such as the Agent's or the Contact's information using the given buttons.

John Smith | Name | Position | Phone
Contact's Fields | First Name | Last Name | Company
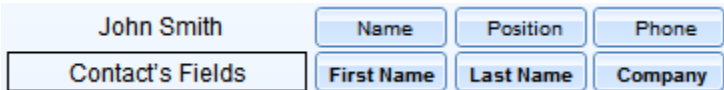
10. Once the email composed is ready to be sent, click the **Send This Email Now** button.

How to search emails

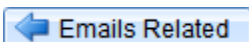There are several ways to find emails in the Email System.
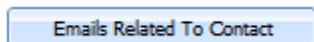
- Using the Search Area

- Using the Email Icons

- Using the Emails Related button

- Using the Emails Related To Contact button

- Using the Find Contacts button

- Using the Check for Email Duplicates button

Check For E-mail Duplicates

Articles, Blogs, Banners Manager

There are many ways by which you can use the software even without having to transact some business to clients. It offers the possibility of writing articles, blogs, emails, banners, videos, etc. the same way when you use them with other specific software, only it is packed in one.
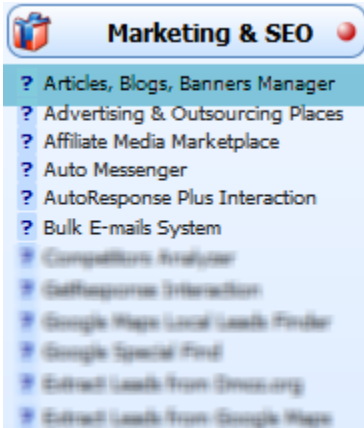
Add an entry
Display entries based on groups
Spin text on your article using the Text Spinner
Check entry with CopyScape

How To Access

Expert View Screen > Marketing & SEO tab

Add an entry

1. Click the Add button

2. Provide information fields about the entry: Title, Description/Links Used/Keywords, Type, Group, Places To Submit

3. **Optional**
   Click the text area under the TEXT tab

   Once clicked, you will be directed to another screen where you can enter the content of the entry

   This is optional because sometimes, you can add entries without contents but only path or link to the entry.

4. **Optional**
   In the content area, under the TEXT tab, provide the content of the entry.

   In the case that your entry is a web page where you must html tags to your content, there are preset tags located at the right side of the content area.

You can then view how it is displayed in a web page by clicking the HTML tab.

5. **Optional**
   If there is an image for you entry, from the content area, click the Back button.

   Back from the article screen, click of the image content and locate in your drive the image.


6. **Optional**
   To link the entry to a contact, select a contact first from the main screen then click Link/Unlink button in the articles screen

Display entries based on groups

In certain cases where you have thousands of entries and you only want to view a particular group, you have the Click to Set buttons, the Black Arrows and the Group Selector button.

The Click To Set Groups
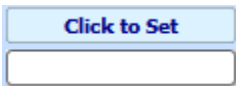
Select one of the entries from the group you want to set. Click any of the Click to Set button. Click the said button with SHIFT to clear the shortcut.

The Group Selector Button
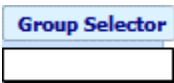
The Group Selector contains a drop down list of all the group from the entries. Click this drop down field to select a group to display.

The Black Arrow

In the Group column, notice that for each entry there is a black arrow. Click this arrow to display only the entries from the group on its left.

Spin text on your article using the Text Spinner

If you go inside the content area by clicking the text field from the article screen, you will find the Text Spinner button.

This button is a feature of the software to spin a selection of synonymous words of a particular word from the page content. To do this, first click this Spinner button that will directly give you {} which is the syntax. The said button is located at the right side of the page content area at the top of user-defined HTML codes.

What you do with the syntax {} is put the synonymous words between the line . For instance are the synonymous words for best. What you should write in the syntax using this example is {outstanding excellent}. Also, you can even put several words between the line .

Finally, once the syntax is all done, click the Text Spinner icon and it will randomly choose from the selection of words. The content page that was used for the Text Spinner will automatically create a new entry and is also added to the list of entries. Note that once you spin an article or blog entry, the title is immediately followed by the word SPUN and will be a new entry.

Check entry with CopyScape

Notice the Check with CopyScape label on top of the text area inside the page content area.

CHECK WITH Copyscape

This label is actually a button that when once clicked, will check the
validity of the current article. The result will then be displayed below the
CS tab.

Advertising Place Manager

Advertising Place Manager is where all the locations of all your advertising and marketing efforts, especially useful if you do a lot of advertising in disparate medias, are managed.

Add an entry

Information Fields

How To Access

Expert View Screen > Marketing & SEO tab
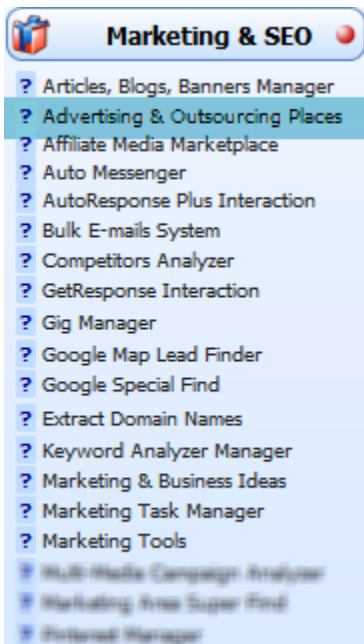
Add an entry

1. Click the Add button

2. Provide information fields about the entry: Place Name, File
    Location, Group, Status, Username, Password, Description of use

3. Optional To link the entry to a contact, select a contact first from
    the main screen then click Link/Unlink button.

Information Fields

Place Name
This field is where you enter the name of the advertising company or
any name that reflects the advertising entry.

URL or File Location
This field is where you enter the URL of the advertising entry. Also, if the
advertising entry is located on your file drive, you can also enter the file
path in the field. To do this, click the import icon next to the A button on
the right.

The A button at the right side of the field is used to display the Alexa
rank of the URL entered.

To run the content of this field, click the action button represented by
the red ball icon.

Group
This field is where you enter the name of the group for a list of entries.
This is a very helpful tool to easily select entries with the same group
through the use of the black arrow on its right.

Used

If the entry is used at the moment, check mark on this field. To select for entries that are check marked, click on the black arrow on one entry that is check marked.

Status

This field is used to indicate the status of the advertising entry. Statuses include Running, Finished, Pending, Paused, Subscription, and Cancelled. However, you can also enter other status of your own as well.

To select for entries based on the status, click the black arrow icon on the right side of the status.

Username & Password

These fields are only used if the advertising entry needs a username and password in order to be accessed. To + button is used to copy both the username and password to the clipboard.

Also, you can encrypt the username and password of the entry to protect them from unauthorized people. To do this, just click the Encrypt icon at the top of the screen. To decrypt, just click the Decrypt icon.

Affiliate Media Marketplace

The Affiliate Media Marketplace is part of the software that allows you to present different kinds of media to your affiliates and other people who are marketing your products. These Medias can range from simple text links to emails, banners, videos, etc. in such a way that the affiliate can get the code automatically without interaction.

How To Access

**Expert View Screen > Marketing & SEO tab**
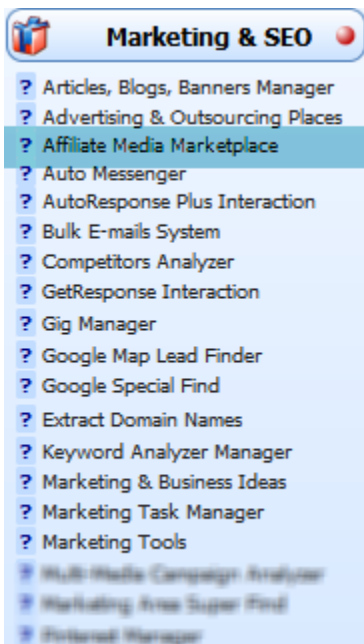
Auto Response Plus Interaction

The Auto Response Plus Interaction is an Auto Responder system that you can install on your own servers which will be under your control. Basically, through this, you can send your series of emails without paying anyone.

Get Auto Reponse Plus
FTP & Internet Related
Control Panel
Add new campaign
Subscribe Current
Articles, Blogs, Banners Manager

How To Access

Expert View Screen > Marketing & SEO tab
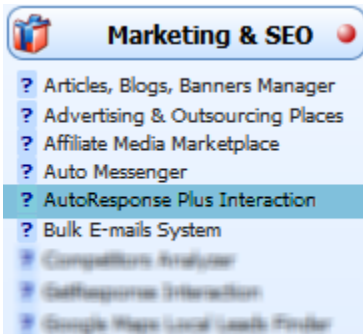
Get Auto Reponse Plus

The first thing that you do is to install a Responder Plus into your server. We suggest that you click the GET AUTO RESPONSE PLUS button to go get Auto Respond Plus. Once it is installed, you need to connect Auto Respond plus to our software for it to work. To do that, click FTP & INTERNET RELATED link under the Setup tab at the right side of the main screen.

FTP & Internet Related

In the FTP & Internet Related Setup, enter the appropriate field in the Domain + Directory field where FormCapture. pl is installed on your server on the Auto Response Area in the Setup. Also, enter your username and the password in the two fields provided. Note that the fields are case sensitive. Once this is done, it should connect to your Auto Response Plus.

Control Panel

By default, when you access Auto Response Plus Interaction, the Control Panel in the windows dialog pop-up is highlighted. Once this is clicked and if everything is in terms with the coordinates you entered in the FTP & Internet Related setup, the coordinates are automatically entered into your Auto Response Plus. You can press the login button to enter.

Add new campaign

To add a new campaign or a new auto responder in the Auto Response Plus, click the Add/Delete Campaign button in the windows dialog pop-up showed after clicking the Auto Responder Plus Interaction icon or link.

- ☑ Once in the Add/Delete Campaign Area (see image below), you can add one campaign or one auto response by clicking the Plus icon at the top left.

- ☑ Then you enter the campaign name and the campaign ID in the two fields. The campaign name is the same description as in the one that you have entered into your auto responder in the Control Panel. Note that it's not necessary to have an identical name but it's a good idea.

Basically, the interaction is not being produced by the campaign ID and the campaign name but having the same name will help you identify and clarify the campaign you want to interact with.

AUTORESPONSE PLUS

The Campaign ID must be known beforehand by entering the AutoResponse Plus Control Panel and visually getting it

Campaign Name	Q Find	Campaign ID	🗑
Sample Campaign Entry		3	🗑

Note that when you create a new campaign or a new auto responder to Auto Response Plus, an ID is assigned. Please do not confuse this ID with the number at the left of the auto responder. That number is not the ID of the auto responder. The ID can be found once the practice links under actions are hovered. While hovering, you will see in the browser the ID.

This ID is very important because this will identify that particular auto responder. You can have unlimited auto responder and that ID will identify a particular auto responder inside our system. The ID will go inside with the number at the left of the auto responder but in future auto responders, it won't go inside so please do not base your ID on the number of the left but only the ID that you see when you hover the mouse over the Properties Link under Actions column.

Once a new campaign or a new auto responder is created, this campaign will be identified and can now be interacted.

Subscribe Current

To create a record or a message into the system and assign an email to receive the message, click the Subscribe Current button from the windows dialog pop-up shown once the Auto Response Plus Interaction is clicked.

Once this button is clicked, you will be asked to select the Campaign that you want to use and the Agent that you want to upload contacts.

All the date that you have entered under Agent Privileges from the Agent you selected will be transferred to the Auto Responder.

Note that this is one of the features of the Auto Responder to easily transfer data from one area to another. Then if you have done everything correctly, you should have a popup saying Subscribed and the email that you are on at the moment.

Articles, Blogs, Banners Manager

For more advance features, you can create the content of those auto responders inside our system and then copy the content to the auto responder.

The reason for this is instead of doing it directly into the system, into the auto responder plus system is to be able to use certain fields that will be part of your database in our software and it will be available in auto responder plus only if you put into the content of the auto responder plus.

One of the ways to do that is by going to the Articles, Blogs, and Banners Manager under the Marketing tab from right of the main screen.

To create content for a particular campaign click the Plus icon in the area.

Then click inside the empty field below the title of the campaign. It will take you to an empty screen where you can type your auto messenger. Note that what you type in this area will be automatically copied in the text area under the title of the campaign in the main area of this section.

Bulk Emails System

Bulk Email System is where you can send one email to a number of contacts. This is generally used for direct marketing or just simply invitations of events that only requires one email to be sent to multiple recipients.

## How To Access

Expert View Screen > Marketing & SEO tab
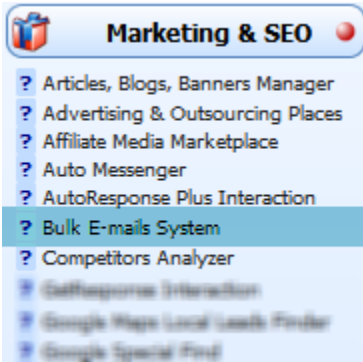
Competitors Analyzer

Competitors Analyzer is where you can visualize and compare between you and your competitors. Through this, you will be able to know what you are up against which will help you focus more on areas of your business that may be vital to your success.

It doesn't just also let you compare websites for traffic and other factors but it will extract, with one click, the Title, Description, and Keywords. The content of that website is also added into the software's integrated Keyword Analyzer.

How To Access

Expert View Screen > Marketing & SEO tab
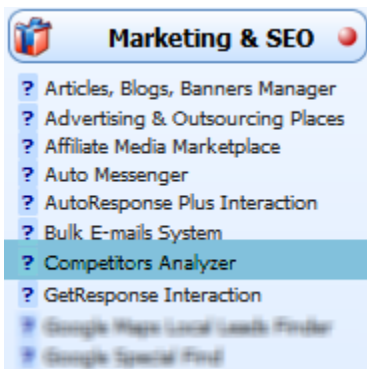
Google Special Find

Google Special Find lets you find information using Google with automated searches that gives you quick access to the best types of results for your query. It is very specific and accurate in its search for information in a way that it provides specific fields on the format of what is to search.

How To Access

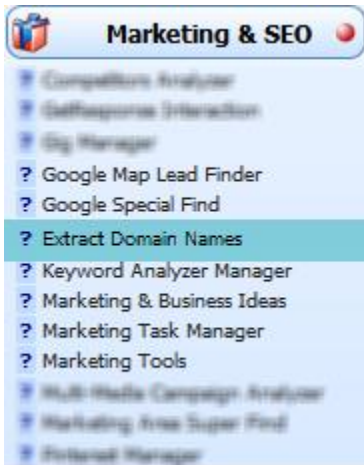**Expert View Screen > Marketing & SEO tab**
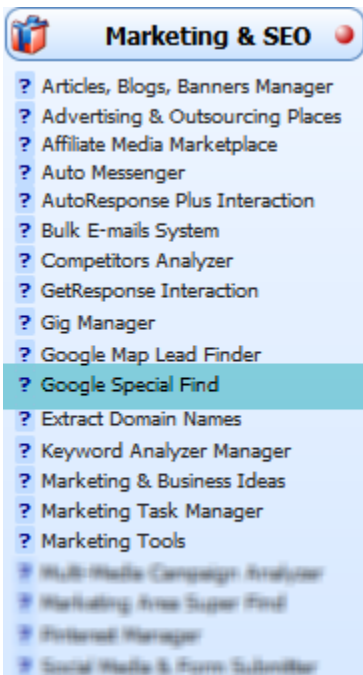
Extract Domain Names

Extracting domain names is used to extract active domain names from the World Wide Web that can be imported into the List Manager as well as import them into your Windows Clipboard. To do this, you need to fill in the provided fields on the windows dialog.
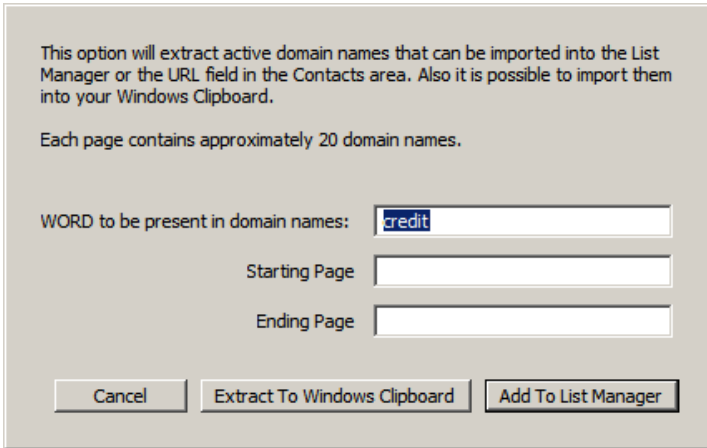
How To Access

Expert View Screen > Marketing & SEO tab

How to get started

1. Click the Extract Domain Names link under the Marketing & SEO tab.

2. A windows dialog will pop up.

   This option will extract active domain names that can be imported into the List Manager or the URL field in the Contacts area. Also it is possible to import them into your Windows Clipboard.

   Each page contains approximately 20 domain names.

WORD to be present in domain names:	credit
Starting Page	
Ending Page	

   Cancel   Extract To Windows Clipboard   Add To List Manager

3. Enter the required keywords based on the specifed text fields as shown in the windows dialog above.

   For example, if you want to search for all domains that contains "credit" in their domain name, enter "credit" in the first text field.

   The software will then extract all domains available with the "credit" present in their domain names.

4. There are two options where to put the extracted domains: in the Windows Clipboard where you can automatically paste anywhere you like, and in the List Manager where they are automatically imported as entries.

Keyword Analyzer

The Keyword Analyzer of the software is where you can manage and control the keywords that you use for your marketing campaigns and other purposes. You can also import and export keywords as well as add prefixes and suffixes automatically and edit misspelled ones.

If you market your services online, this area also allows you to control the keywords that you use to promote your domains. You can create groups of keywords and export these lists.
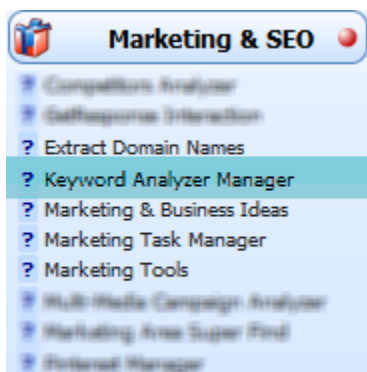
> **Keyword information**
> **How to group keywords**
> **How to find and select keywords**

How To Access

Expert View Screen > Marketing & SEO tab

Keyword information

Keyword Field

The keyword field is where you enter basically the keyword entry. The P button beside the field is used to change the keyword text in its proper case.

To change the keyword text in its upper case, click the P button with SHIFT+CTR+ALT. To copy the keyword entry to the clipboard, click the C button next to the P button. To run the content inside the keyword field, click the action button which is beside the C button.

Notice the other two columns beside the Keyword column. The O column is used to omit the keyword entry while the T column button is used to go to Thesaurus to find the synonym for the keyword entry. Moreover, to check if the keyword text is misspelled, click the M button.

Rank Field

The Rank field is used to set the keyword entries their subjective rank in certain cases when you want to determine what keyword is the best among the entries.

You could also use this to rank several keyword entries with the same rank. This is similar to grouping them based on their rank. The black arrow facing left is used to select for the keyword entries based on the rank from its left.

The R button which is situated beside the Rank column label is used to replace the rank of all the selected keyword entries with the rank of the current keyword entry.

URL to Evaluate

Included in the field entries are the URLS to evaluate. The first URL is your URL to be evaluated. The other URL is the URL of the competitor to be evaluated. This way, you can compare their position when searched based on the keyword entry.

To check the URL positions based on the keyword entry, click the Check URL Position for Selected Keywords button on top of the URL columns. The Keyword Analyzer will then enter the position of both the URL in the Position 'POS' field. In the case where there is no position result, it means that its position is far away from the first 100 positions when searched in the internet.

How to group keywords

When you have thousands of keywords in the list of keyword entries, you can group them in the Keyword Analyzer in the following ways:

Group Field

In the Group field, you can enter the name of the group the particular keyword entry belongs. To select for the keywords based on the group, click the black arrow facing left. It will then select all the keywords that is included in the group from the left of the black arrow that was clicked.

Group Selector

On top of the Group column is the Group Selector button and text field. Note that when you add a new group in the Group field of the keyword entry, it will also be included in the list of groups in the Group Selector drop down field.

To select for the keyword entries that belong to a particular group, just select from the list of groups from the Group Selector field.

Click To Set

The Click To Set group of buttons is a special feature of the software where you can save or set the group that you use frequently or the group so important that you have to make a shortcut for it.

To set group of keywords to one of the Click to Set group buttons, select on the group and click the Click to Set button.

How to find and select keywords

Find Button

The most basic way to find for keywords is using the Find icon located at the top part of the Keyword Analyzer screen.

Letter Buttons

In the case where you want to find for keywords based on the beginning letter of their names, you can use the letter buttons located on the left side of the Click To Set buttons. Once you click any letter from the letter buttons, it will filter all the keyword entries based on the beginning letters of their keyword entry names.

Random Selection

In the case where you have a large set of database of keyword entries, you can use this option to select for keywords. When you click the Sample button, it will select the Nth record based on the number you input in the text field on its right.

To retrieve for the previous selected keyword entries, click the R button. To set testing group to selected keyword entries, click +. To omit the selected keyword entries using the random selection option, click the - button.

Marketing & Business Ideas

Marketing and Business Ideas, as the name implies, is part of the software where you can store all of your marketing and business ideas in one place. You can record unlimited ideas, review and even update them as many times as you want with ease.

How To Access

Expert View Screen > Marketing & SEO tab
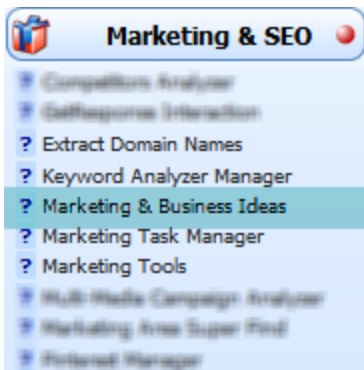
Adding a marketing and business idea entry

1. Click the Add button

2. Enter the title of the entry in the Title field

3. Enter the description of the idea in the Description field

4. For small notes and keywords, there's the Additional Notes and Keywords field

5. **Optional**
   To link a contact to an entry, select a contact from the main screen and click the the Link button of the entry.

Marketing Task Manager

Marketing Task Manager is where you can keep track when your marketing campaigns should be launched. This is a special feature of the software in a way that you can manage your marketing campaigns and at the same time able to control them.

Adding a Marketing Task entry
What to do with finished marketing tasks?

How To Access

Expert View Screen > Marketing & SEO tab

Adding a Marketing Task entry

1. Click the Add button
2. Enter the title of the Marketing Task entry in the Marketing Strategy Subject field
3. Enter the description of the entry in the **Actions To Take** text area.
4. Assign the entry to one of the agents registered in the software in the Assigned To field
5. Enter the amount budgeted for the Marketing Strategy in the Amount field.
6. In the Action Date field, select the date the Marketing Strategy is set to take action.
7. Set the current status of the entry in the Status field.
8. **Optional**
    If the entry is recurrent, check mark the RT field under the Recurrent Info column and set the number of times the entry must be done.

What to do with finished marketing tasks?

Once a marketing strategy has been taken into action, click its **Done** button. This button is located inside the Marketing Strategy Subject field.

When a marketing task/strategy is done, the **Actions Taken** text area will have a DONE text with the assigned agent. You can also append other notes in the text area but all the older notes written inside cannot be deleted.

Marketing Tools

Marketing tools is a unique feature of the software that is used to import and select contacts for marketing purposes. It is composed of several marketing tool that helps you in your marketing or other transactions.

Combine file contents from a folder

Letter, Word, and Line Count

Delete irrelevant characters and spaces from a text

Extract text based on Regular Expression

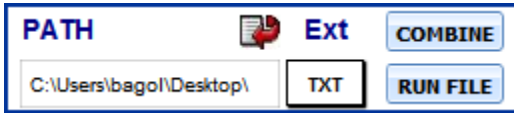**Delete text within a text**

Find quality linkable websites

Preserve text within a text

Sort list

How To Access

Expert View Screen > Marketing & SEO tab

Combine file contents from a folder
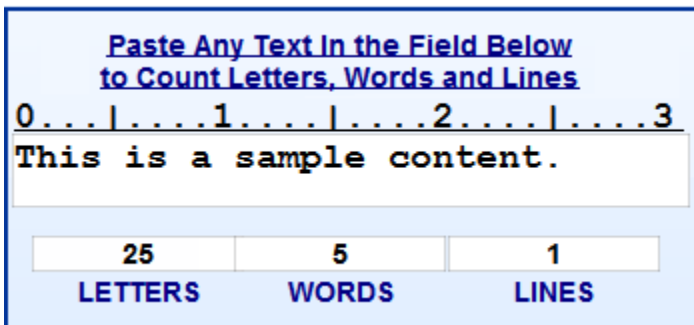
PATH	📄	Ext	**COMBINE**
C:\Users\bagol\Desktop\		TXT	**RUN FILE**

This feature can combine files with .txt or .csv extensions into one file. To do this:

1. Select the path from your computer drive using the import button.
2. Choose what file extension in the Ext field the software will search in the path you have entered.
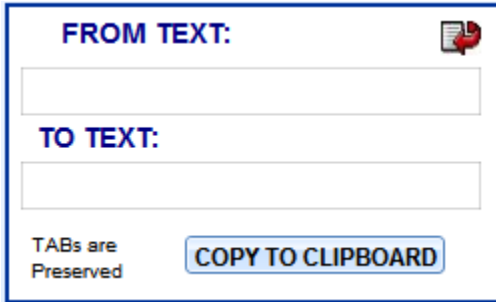3. Click the COMBINE button.

To run the combined files, click the RUN FILE button.

Letter, Word, and Line Count

Paste Any Text In the Field Below to Count Letters, Words and Lines

```
0...|....1....|....2....|....3
This is a sample content.
```

25	5	1
LETTERS	**WORDS**	**LINES**

To determine the number of letters, words, and lines your text have, enter them in the provided field. Automatically, the software will calculate once text has been entered in the field.

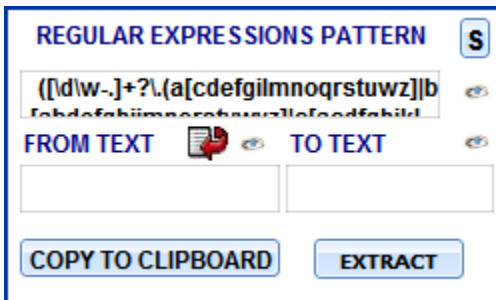## Delete irrelevant characters and spaces from a text

FROM TEXT:

TO TEXT:

TABs are Preserved   COPY TO CLIPBOARD

When your text has irrelevant characters and extra spaces, you can strip them off here. To do this, import the file using the import button. The software will then extract the content of that file and put it in the FROM TEXT field.

Automatically, the software will delete or strip irrelevant characters and extra spaces from the content. The formatted or clean output will then be entered in the TO TEXT field.

Extract text based on Regular Expression

REGULAR EXPRESSIONS PATTERN   S

([\d\w-.]+?\.(a[cdefgilmnoqrstuwz]|b

FROM TEXT   **TO TEXT**

COPY TO CLIPBOARD   EXTRACT

To extract a text based on the given regular expression in the regex pattern field, enter the text in the FROM TEXT field. Then, click the EXTRACT button.

Automatically, the result of the extracted text will be entered in the TO TEXT field.
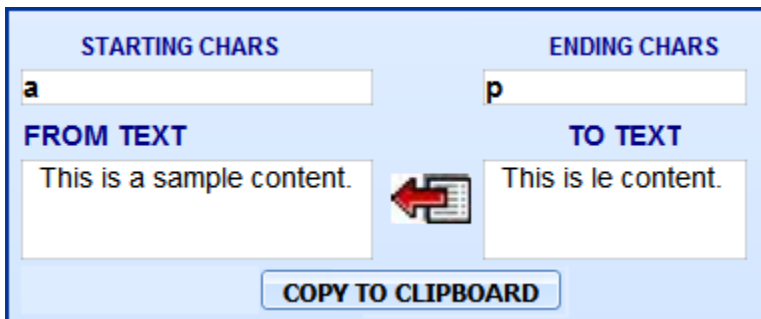
Add a new regular expression pattern
By default, a regex pattern is provided in the regex field as shown in the figure above.

To add a new regex pattern that you have, click the S button. There is an eye button beside the regex field that will give you a regular expression cheat sheet.

To use this new regular expression pattern, in the Snippet window, click the I button.

Delete text within a text

To use this feature:

1. Enter the original text in the FROM TEXT field.
2. Enter the starting character/s of the text to be deleted in the STARTING CHARS field.
3. Enter the ending character/s of the text to be deleted in the ENDING CHARS field.
4. Automatically, the software will strip off or delete from the original text the text with the given starting and ending characters.
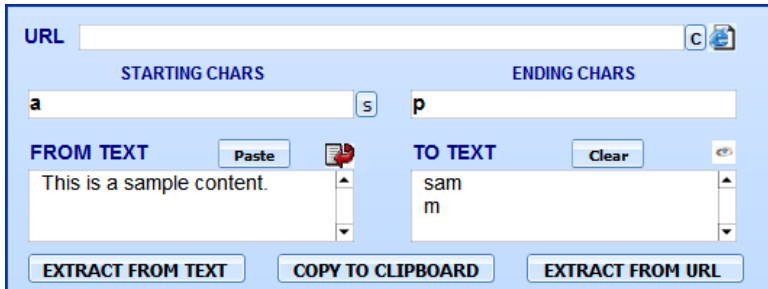
Find quality linkable websites

This is where you can search for websites with the specific keyword that you must provide in the Keyword field with the type of website of your choice.

Marketing Tools provides four types of domain such as COM, ORG, GOV, and EDU. Each type has three columns which have specific functions or features in finding websites.

The **first column** finds blogs that contains or is about the entered keyword. The **second column** finds websites that contains or has a title of the entered keyword. The **third column** finds website that is powered by BlogEngine. NET with the entered keyword.

Preserve text within a text

This marketing tool is used to preserve text with in a text based on its starting and ending characters which is ideal to preserve certain parts of a text in just one pass.
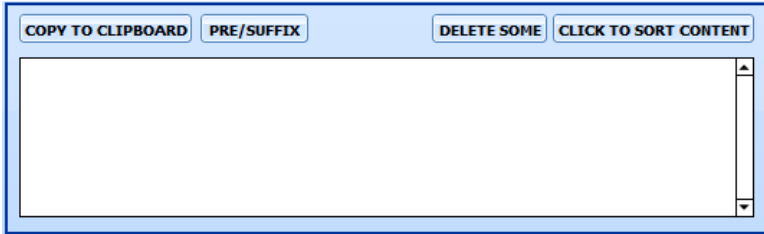
Extract From Text
To extract preserve texts from a source text, enter into the FROM TEXT field the text that you want to preserve specific texts from. Then set the starting and ending character of the text you want to preserve into the STARTING CHARS and ENDING CHARS fields and click the EXTRACT FROM TEXT button.

Extract From URL
Aside from preserving text from a text source entered into a field, you can also preserve text from a provided URL. This will extract the contents from the given URL and filter them based on their starting and ending characters.

To do this, enter into the URL field the URL and set the starting and ending characters of the text that you want to preserve from the URL texts. Then click the EXTRACT FROM URL button.

Sort list

Pre/Suffix
This will add or delete a prefix or a suffix from the list.

Delete Some
This will delete the line with a specific word or text from the list.

Click To Sort Content
This button will sort the list in ascending or descending order. It will also delete duplicate lines with or without sorting the list.

Multimedia campaign analyzer

Multimedia Campaign Analyzer is part of the software that is designed to analyze which marketing campaigns offers that you receive are best. This specialized area lets you manage and analyze unlimited campaigns especially those that use time slots as well as determine which campaigns are underway.

How to add a media project
Campaign information

How To Access

Expert View Screen > Marketing & SEO tab

How to add a media project

When you add a campaign for the first time, you will be asked to add a media project for the campaign or campaigns yet to be added. Media Projects are used to categorize the campaigns to be analyzed.

Also, you can add a media project manually by clicking on the Add Media Project. To delete or modify a media project, the Delete Media Project and Modify Media Project are also provided at the upper part of the Media Campaign Analyzer screen as well as the Duplicate Media Project.

One a media project is added in the system, it will be included in the list of media projects in the Media Project Selector field to be selected. The Media Project Selector is used to display all the campaigns under the selected media project. To select for media project from the list, just click on the field from which the list of media projects will display in a drop down format.

Notice beside the Media Project Selector field the R and All buttons. The R button is used to refresh the Media Campaign Analyzer screen after selecting a new media project. This is the same as refreshing your desktop window using the Refresh function. The All button however, lets you select for campaigns based on the currently selected media project or select all the campaigns.

Campaign information

Start Date
This field is where you enter the date the campaign will start. You can either input the date manually or use the buttons above its column name.

The T button sets the date to Today's date. If it is clicked with the SHIFT key, it will set the date to tomorrow's date. If it is clicked with the SHIFT + CTRL keys, it will set the starting date of the campaign to the first day of the current month and the end date to the last day of the current month.

The S button sets the date of the selected campaigns. Once clicked, it will display a pop up dialog that is used to select for the date.

The C button clears the starting date of the selected campaigns. Meaning, it will empty the starting date field of the selected campaigns.

End Date
This field is where you enter the date the campaign will end on which you can also input the date manually or use the buttons above its column name.

The M button sets the date to the last day of the current month. The S button sets the date of the selected campaigns. Once clicked, it will display a pop up dialog that is used to select for the date. The C button clears the end date of the selected campaigns. Meaning, it will empty the end date field of the selected campaigns.

Status

The status field determines if the campaign is running, pending, finished, or is paused. To select for the status of the campaign, just click on the status field.

Notice the buttons above the status field column.

The R button represents the Running status; the first P button represents the Paused status; the F button represents the Finished status; and the second P button represents the Pending status. When you click on any of the buttons with the SHIFT key, it will display and select all the campaigns with the particular status.

Media

This field is where you enter the name of the media of the campaign. To select for campaigns with the same media, click on the black arrow beside the field.

Duration

This field is where you enter the duration of the campaign. Note that this field uses the minute format. Hence, what should be entered here is based on the number of minutes. For example is 0.5 for 30 seconds.

To select for campaigns with the same duration, click on the black arrow beside the field.

Time Slot

The time slot field is where you enter the time the campaign will be aired. Note that this field must be written with the format HH: MM AM/PM-HH: MM AM/PM (e. g. 8:00AM- 8:30AM).

To select for campaigns with the same time slot, click on the black arrow beside the field.

Description

This field is where you enter the description of the campaign. This field is located below the campaign buttons on the upper part of the screen.

Also included in the description area are the colored buttons where you can color the text inside the description field. There is also an action button that is used to run the contents of the description field.

Group

To group campaigns, enter into the U. D. group field of the particular campaign so that when you click on the black arrow beside the group field, it will display all the campaigns that have been set with the same group name. Also, this field is located below the description field on the upper part of the screen.

Vendor

This field is where you enter the name of the contact who sold you the media. You can also use the Go button beside this field to enter the reference file that links to the vendor contact.

To select for campaigns with the same vendor, just click on the black arrow beside the Go button.

Campaign ID

The Campaign ID field is the Invoice Ad Campaign so invoices can be interpreted as orders in this area when using the Recalculate button.

Delete Campaign

Every campaign entry in the system has a delete icon that is used to delete the particular campaign. The Delete Campaign button located on the upper part of the screen however, will delete not just the current campaign, but also selected campaigns on display.

Marketing Area Super Find

The MARKETING AREA SUPER FIND consists of the Navigation bar that is used to navigate search results; the Find button that is used to find entries based on the inputted text; the General Notes area that provides for a text field where you can enter notes associated with the search result entries; and the search result area where all the results from the search is displayed in a list.

To start finding entries from all advertising areas in the software, click the Find button.

Once the Find button is clicked, it will display a Windows dialog from where you will enter the text to find.

How To Access

Expert View Screen > Marketing & SEO tab
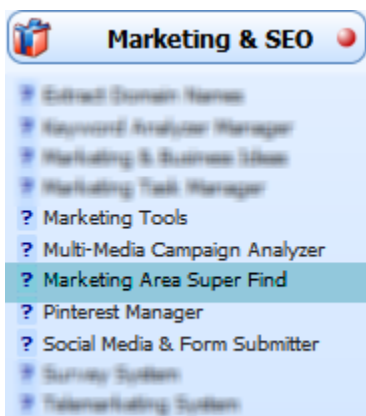
Social Media & Form Submitter Assistant

The Social Media and Form Submitter Assistant is part of the software that is used to submit login forms to websites that you are affiliated with or any websites that you need to login or in some way interact in a repetitive way.

Imagine that you have many affiliation providers, sometimes it's not easy not only to enter into a particular panel to grab codes or simply to review. With this, you can have a centralized place where you can review all your account without having to remember all the different passwords and all the different entries that you need to do.

How To Access

Expert View Screen > Marketing & SEO tab

Survey System

The Survey System of the software is where you can create, manage, and post to your own domain on the Internet unlimited customer surveys. You can then import the responses from you customers directly into the software. This way, you can gather and analyze their information to give you important clues about your business through the survey questions.

How To Access

Expert View Screen > Marketing & SEO tab

Tracking of Marketing Campaigns

Tracking of Marketing Campaigns is where you can enter marketing issues and have unlimited campaigns whether online or offline within each issue in which you can control.

With the issues and campaigns, you can then: track conversion rates and profit/loss for each campaign or consolidate all your campaigns to look at the big picture, analyze the ROI of your marketing campaigns so you can decide which ones are profitable and which aren't. You can also combine online marketing campaigns with offline marketing campaigns in one place.

How To Access

**Expert View Screen > Marketing & SEO tab**
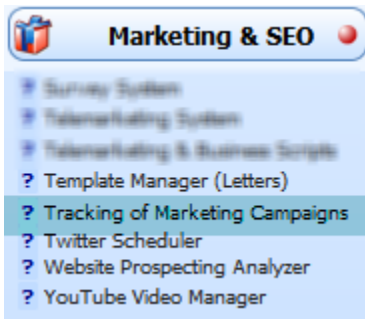
Twitter Scheduler

The Twitter Scheduler is a special area of the software that allows tweets to be rescheduled in advance or send them immediately. This is useful in cases where tweets are needed to be set beforehand such as the case of having certain tweets about certain meetings that needs to be sent three days, 5 hours, or 1 hour before the meeting or when tweets are needed to be resent in a prescheduled way.

In order for a tweet to be sent in a recurrent way or a prescheduled way, Check Tasks Every should be marked and must be entered with preferred time inside the Agent Privileges of the Setup of the system. This way, the tasks will be checked as well as the tweets.

How To Access

Expert View Screen > Marketing & SEO tab
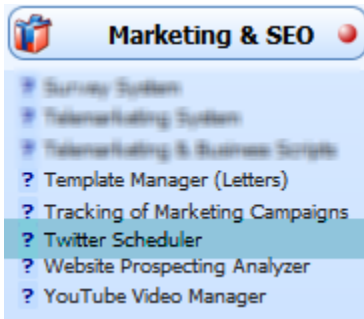
How to interact from a third party in twitter

In order to interact from a third party in twitter such as the Twitter Scheduler in Credit Money Machine Net, the following steps are needed to be followed:

1. Go to http://dev.twitter.com/ , click "Sign In" at the top, and log in.

2. Once logged in, click "Your Apps" at the top.

3. Click "Register New App" at the right.

4. For all text fields (Application Name, Description, Application Website, Organization) type anything you want, it doesn't matter (only the URL has to be of the style http://anywebsite.com).

5. Choose "Client" for Application Type.

6. Choose "Read & Write" for Access Type.

7. Type in the captcha and click "Save Application".

8. If you submitted the application correctly, you should be able to see:

   ☑ Consumer key
   ☑ Consumer secret

9. Write these down somewhere. Then click "My Access Token" at the top right of the screen. You should see:

   ☑ Access Token (oauth_token)
   ☑ Access Token Secret (oauth_token_secret)

These steps can also be seen by clicking the HELP icon at the top of the Twitter Scheduler screen. Once you have followed the instructions above, you are going to have your username and the password for your twitter account and the four tokens. Those tokens are identified with the names: consumer key, consumer key secrets, access key token and access token secret. Note that the username, password, and four tokens are needed in order to interact and schedule or create recurrent tweets.

Website Prospecting Analyzer

The Website - Prospecting Analyzer determines how effective a particular website is. Basically it analyses the website, prospects it, and determines if the website is worth its web space.
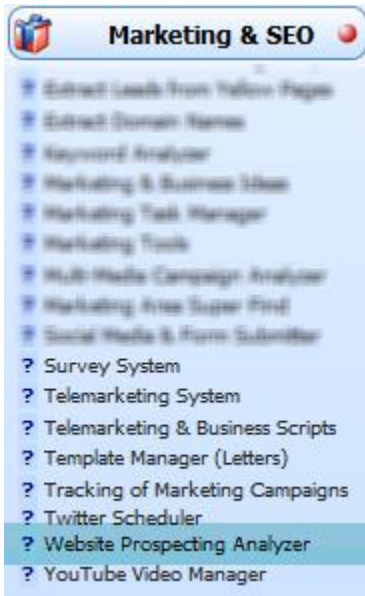
Add a website to analyze
Analyze website entries using Alexa
Create shortcut for related website entries

How To Access

Expert View Screen > Marketing & SEO tab

## Add a website to analyze

1. Click the **Add** button

   If you want to extract the websites from your contact list and add them as an entry, click the **Import Domains From Contacts** button. This will also automatically extract the Email, Phone, Company, and Name fields on your contact list.

   If you have a list of websites in a file (assuming there is only one website per line in your file), you can copy that list and **click Import Domain Names** button.

   You can also add entries by extracting websites from the internet. To do this, click the **Extract Websites From The Internet**. Then, enter the Keyword in the Windows pop up to search and the number of pages from the result to extract. This will then extract the results from the Internet and add each of them as an entry with their corresponding descriptions.

2. Enter the URL of the website in the Website field.

   Do not be confused with the big text field under the Website field entry as shown in the figure below. This is where you enter the **description** of the website entry.
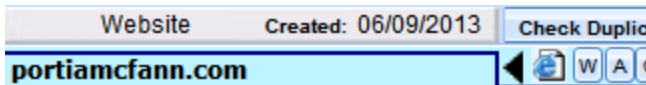
3. **Optional**

   Provide the necessary information for the entry such as its
   Keywords, Related info, Source, Email, Phone, etc.

   If you extracted the website entries from the Internet, the Keywords
   and Source fields are automatically provided.

Analyze website entries using Alexa

Every website entry in Website Prospecting Analyzer have an Alexa
button. Alexa is a web information company that provides information
about websites including its traffic rank, page views, and popularity.

To analyze the website entry, click the A button.
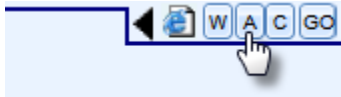
Create shortcut for related website entries

Based on the entry's Related To field, you can create a shortcut for them
as a group using the Save To buttons.

To do this, select any of the website entry that belongs to the Related To
group, then click the Save To button. After clicking the button, select
any of the empty fields beside the Save To button and click the field.

Youtube Video Manager

Youtube Video Manager lets you manage all your youtube videos in a way that can easily group and compile them in a list and where it will be convenient to watch and edit directly without the use of a browser.

Add a YouTube video
Add video entry by uploading a video to YouTube

How To Access

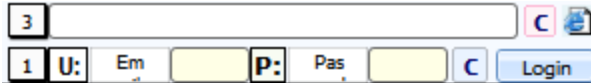**Expert View Screen > Marketing & SEO tab**

Add a YouTube video

1. Click the Add Video button

2. Under the Youtube View tab at the right side of the Youtube Video Manager screen, enter the ID of the YouTube video in the indicated field.

3. Enter your desired title of the video in the **Current Video Name** field.

4. Enter the group name of the video entry in the Group Field.

5. **Optional**
   Provide necessary information of the video such as its tiny/short URL, YouTube title, Description, etc. in the given fields under the YouTube View tab.

6. **Optional**
   Click the Click Here To Link button to link the current contact from the main screen to the new video entry.

7. Once all is done, you can then view the video by either clicking the Go button beside the YouTube ID field or the browser icon beside the URL field.

Add video entry by uploading a video to YouTube

Notice that there are provided fields for logging into a youtube account: Username (U) and Password (P).

1. Provide the email or the username and password of your YouTube account in the given fields as shown in the figure above.

   **Encrypt the Username and Password**
    In order to hide the true value of the username and password of your YouTube account, you can click the **Encrypt Password** button. To return their value back, click the **Decrypt Password** button.

2. Click the Login button.

    By clicking this button, the content section of the screen will automatically load the upload page of YouTube with your account.

3. Upload your video.

4. While waiting for your video to upload, enter the YouTube title, description, tags, and category in the provided fields of the software at the right of the content section.

5. Once the video has finished uploading, YouTube will try to process it. After the video is ready. Go to the Youtube's edit mode of the video by clicking this button
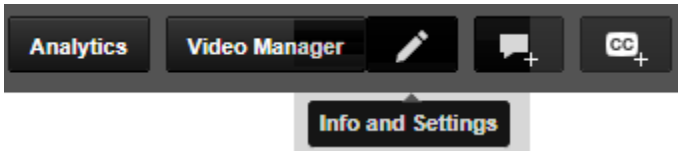
6. Click the **Fill Form** button to automatically fill in the fields from YouTube based on the software's matching fields from Step 4.

7. Save the settings of the YouTube video inside the content section.

8. Click the Import button and select Import to get the ID and the short URL of the YouTube entry and automatically paste them in the software's YouTube ID and Short URL field.

Time Related

Credit Money Machine Net

Time Manager

The Time Manager System is a feature of the software that is used to delegate your times effectively so you can work on the more productive things.

Note that in order to display the time entries of a particular client/contact, you have to select the contact from the main screen first. This way, when you enter into the Time Manager screen, the only records displayed are only the ones with the selected contact on it.

How to add a time record
Setting up consultation time to clients

How To Access

**Expert View Screen > Time Related tab**
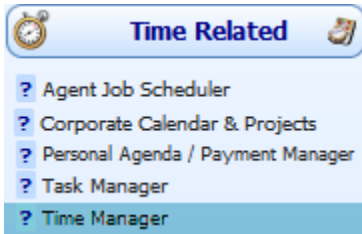
How to add a time record

1. To add a record for the contact selected with the current agent, click the Add button

2. Once a record is added, it will create new line in the list of records of the selected contact. This list includes the column of the time started, the time the record has ended, the number of hours and minutes the contact has worked, the number of hours and minutes of recess time, the status of the record whether it is closed or still open, the number of minutes all in all, and the amount based on the number of hours worked.

3. To start the timer of the newly created record, click the Start Timer button. This will count the time the record is still working on. Also, once clicked, the status of the record will be set as OPENED.

4. To stop the timer, just click on the Start Timer button again. This will set the status of the record as CLOSED.

5. Once the timer is stopped, the Time Manager will calculate the number of hours and minutes the time was running. It will also calculate for the amount based on the calculated hours and minutes the time was running. The amount, however, is set under the client and agent area.

Setting up consultation time to clients

On Expert View of the software, there is a Time Manager icon located below the Basic Contact Information section from the main screen.
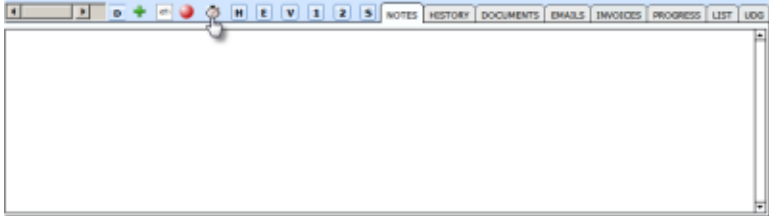
Each contacts in the software is provided with the indicated icon. This means that the consultation hours of each client is different from the other.

To directly set the consultation time on the client from the main screen without going inside the Time Manager, just click the Time Manager icon. Once clicked, you will be presented with three different options. This time, select START and indicate the description of the consultation.

To stop the consultation hour, just click the icon again and select STOP. On the other hand, to select for contacts with open consultation hours, select the SELECT OPENED CONTACTS option.

# ECommerce

Credit Money Machine Net

Domain Manager

Domain Manager is where you can record domain names, expiration dates, and other relevant data for all your domains. You can even attach a screenshot or an image of the particular domain as well as determine if a certain domain is available or not and much more.

Adding a Domain entry in the List View
Domain Information inside Full View

How To Access

Expert View Screen > E-commerce tab
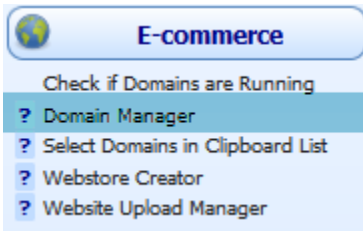
Adding a Domain entry in the List View

This is the fastest way of adding a domain entry with all the most necessary information to manage the domain.

1. Click the Add button

2. Enter the name of the domain in the Domain Name field.

3. **Optional**
   If the domain hasn't been registered yet, you may want to check if this domain name is still available or not. To do this, enter the domain name in the provided text field as shown in the figure below and click the IS DOMAIN AVAILABLE button.

4. Set the status of the domain entry in the Status field.

5. Set the Google Submission date of the domain in the Google Submission field so it will be included in Google's search list.

6. If the domain has already been registered and you know when it will expire, you can manually enter it in the Expiration field.

   On the other hand, you can also let Domain Manager do the job for you. By clicking the Set Expiration Dates Automatically button, Domain Manager will get all the expiration dates of the domains in the list based on their information in the WHOIS system and enter them in their particular Expiration Date fields.

7. In the How It Is Used field, enter the description of what the domain is all about.

8. **Optional**
   You can also set where the domain belong in the Group field.

9. **Optional**
   Insert a picture for the domain entry in the Actual Picture field. To insert a picture, clik the Import Picture button or just right click the picture field and select Insert Picture.

Domain Information inside Full View

By default, when you access Domain Manager you will be displayed with the List View which only contains small information about the domain.

In order to fill in all necessary information about the domain entry, click the Full View button.

Below are some of the information on the domain that you may find in the Full View screen:

- Server path
- Hosting company
- FTP host
- URL Control Panel
- Owner information
- Administrator
- SQL and DNS information

Webstore Creator

Webstore Creator lets you create your own professional web store using the products within the software as well as display your products or items online. Its main function is to create a web store to sell your products in a way that potential clients can easily show them through the internet without having to go to the main physical store

Creating a Webstore (Showroom)

Contact Us Page Company Information

FTP coordinates to upload the pages for showroom

Showroom link labels

Showroom content area

Main files upload

Product details

Selling and purchasing area

Adding images to your showroom

Importing Images

Inside the product zoom picture window

Adding videos to your showroom

Selecting showroom options

Using the showroom as a shopping cart

Finding, Searching, and Selecting Products

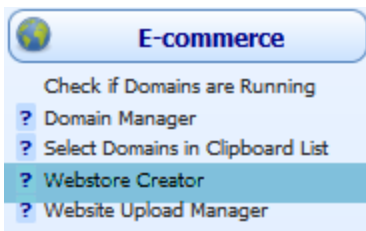**Modifying data in bulk**

Set based on cost and price buttons

Uploading a showroom to your server

Submitting your showroom to Google

Viewing and printing products as a catalog

How To Access

Expert View Screen > Ecommerce tab

Creating a Webstore (Showroom)

A web store, also called showroom, is where your products or items are stored in the software which can be displayed online. To setup a web store, click the Web Store Setup button at the top of the screen.
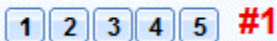

You will then be directed to the Showroom Setup where you can setup your showroom.

Selecting A Showroom
Before setting up a showroom, be sure to select one of the five numbers that you see in the right section of the Showroom Setup area in order to determine and select at the same time which catalogue you want to work with.

Contact Us Page Company Information

The first thing to do in setting up a showroom is to provide details for the company information. This part of the Showroom Setup is where you will put your Company Name, addresses, Email, Email for Contact Us, Phone, Fax, and Currency.

You don't have to do this if you don't want but this is what will show in the contact page of your showroom. So if you don't want to show that at all, then you don't put anything at all but it's a good way so people can contact you.

For example, an auto-dealer with used cars can take advantage of people going every day to see what's new in their stock and have them contact very easily through there.

FTP coordinates to upload the pages for showroom

This is the most important section of setting up a showroom. FTP stands for File Transfer Protocol. It is essential that these coordinates are correct if you want to upload your showroom on the web.

Catalog Name
Usually, when you click the buttons under the Select Showroom label for the first time, the default Catalog Name would be "Duplicate". However it can be edited. You can enter the showroom name in this field. Let's say we enter, "Showroom".

Host IP
Your hosting company can help you with these parameters if you don't know exactly what to put. You can go to www.godaddy.com and register your own domain.

Let's say that our domain is www.myshowroom.com. Usually, the host IP for such domain would be FTP.myshowroom.com but it can vary. It can be an IP or maybe a different name but in general if you are using a host that is standard, most probably it is FTP. myshowroom. com.

User ID and Password

The user ID is the same user ID that you receive from your hosting company in order to access the control panel of your new domain. The password is also the same. They can also be changed at a later time either in the control panel of your domain but if you do that you need to change them in this software too.

Domain + Dir

The domain and the directory are exactly that. You might want to have your showroom in a different directory than in the root directory of your domain. For example in this particular case, if you don't want to use the root directory, it would be www.myshowroom.com/items or anything. That would be the domain plus directory.

Initial Directory

In the Initial Directory field, you usually need to put a forward slash ("/"), the name of the directory (in our case "items") and another forward slash ("/"). This varies by the hosting company so it is possible that you don't need to put the last forward slash or the first forward slash. Your hosting company can help you with that.

To check if this system works or if these coordinates work is to upload the setup files. To do that, there is a blue arrow at the top of the screen that points up and says Setup Upload. You can click that icon after creating the FTP coordinates and assuming they are correct otherwise it won't work.

There is a little issue here, in some hosting companies they won't let you create directories automatically unlike what we are trying to do here. So, it's possible that it doesn't work because your hosting company does not allow you to create directory automatically. In that case, you need to go and use free FTP program like Filezilla that you can download for free in www.filezilla.org and the coordinates that have you used, you can enter into your website structure and create a directory which has to be exactly the name that you want to use for the showroom. In that case you will create the directory manually and you will click Setup Upload icon again. That will upload the basic files. Still you haven't uploaded all the files that you need but it's the initial thing.

Showroom link labels

This part of the Showroom Setup is where the links for the menus for your showroom are both labeled. The defaults of the link labels are Home, Hot Deals, Products, and Contact Us.

The good thing about this is that you can change these labels and you have the ability to create three more link labels or even delete some of them. You can add links or websites outside the frame and even put HTML contents if you know about it and you can use it to display these pages.

Showroom content area

In order to control what to display on your showroom homepage, this part of the Showroom Setup is provided where you can enter the showroom header picture, logo, the URL of the header picture once clicked, etc.

Note that what you enter into the content footer and content home fields are HTML codes.

Additionally, in the site keywords field you can enter engine optimization for SEO reasons and enter the site keywords that you would like to use. Enter any keywords that are related to the items that you are displaying separated by commas.

Also, regarding the site title and description, the Site title is the title that will be shown at the top of the window when people will see your showroom and a site description that will be seen by search engines like Google. Anyway, we have Google submission utility at the top left of this section.

Main files upload

Once you have entered all the required data, you still need to do one more step to have your initial showroom setup. You need to upload the main files that can be uploaded by the Main Files Upload button at the top of the screen.

It can take a little bit of time because there many files that needs to be uploaded in the basic images etc. Once it is done, it can be shown by clicking the browser icon to the right of the domain plus directory to the right of the screen that will take you to our internal or to your default external browser if you click with shift.

Product details

Date Created And Updated

This is where the date on which the item was created is automatically filled-in by the software. The Updated field is where the date on which the item was last updated is also automatically filled-in. This date cannot be changed but they can be searched.

Code

This is where you enter any code that you want to use to identify the product. This product code will be shown inside your web showroom. So make it reasonably short otherwise there could be a problem in the formatting in the showroom.

Location

This field is where you enter the location of the product or where the product is placed. This is used to know where the item is for certain situations where you have hundreds of items and you have it in different places. This could be sort of a tracking number or a physical place or any other use that you can give as long as it gives the physical location of the product.

Description

This is where you enter the description of the product. You can type whatever you want or type it using HTML codes.

Notice that right beside the description field is a paste button. This button will paste whatever you have in your windows clipboard right into the description field.

Status

The status is an indication of the status of the product whether it is available or not. This data won't affect the use of the showroom but it's going to be used for your information. You can control the display in another characteristic of these products.

Category

The category is important because it will affect the look of the showroom. It automatically groups products under different categories in different links inside the showroom.

Note that in creating a category, make it as short as possible otherwise it might affect the formatting of the showroom.

Specification

The specification as supposed to the description of the product contains the name of the item with a short description. It could be long but it's not a good idea. However it is meant for longer descriptions since it will go under the picture when you are displaying the showroom as supposed to description which will go the upper part. So if you put too much description, it will push the image.

Keywords

The keywords are only related to findings that you do later into your local computer-based web showroom. So you put keywords that are appropriate for you to find a certain product that are similar. You can put more than one keyword and you don't need to separate the keywords by comma. A space is perfectly alright. You can even put unlimited keywords that will help you find items using the searching capabilities in the web showroom.

Selling and purchasing area

Purchasing Area
If the purchasing area is blank, you should click the show button in order to display that area. The reason to have the show and hide buttons in that area is because maybe you will be showing this computer to a friend and you don't want to show your private vendor information.

Selling Area

Your Price Field This field is used if you intend to sell or only display the item with the price. The A button on its left is used if you want to adjust the price of the item. The R button on its right is used if you want to replace the price of selected items.

S&H Field S&H stands for the Shipping and Handling Field. The R button on its right is used to replace shipping and handling fields for selected products.

MSRP Field The manufactured suggested retail price is used in offering your items at a lower price than usual.
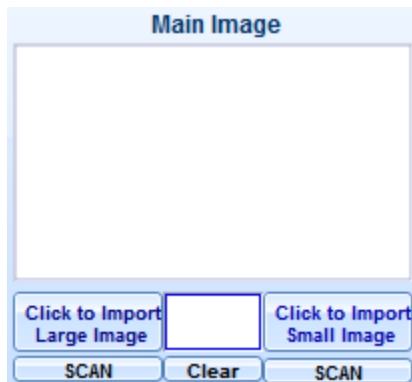
Adding images to your showroom

Once the product is created, it is possible to add one image of the product or several images of it to make it more appealing to the public eyes and especially grab attention to the buyers. Although it is important to add images to the product, it is not a must. It can also be possible not to do this.

You can still have no images added to the product and have the description and the code displayed. This is appropriate for certain instances where you have several products that you have imported with an excel file for example.

There are several ways to add an image to your showroom.

The main image at the center of the screen is by default blank when creating your first product. If you click on it, another window will pop up which can be closed by clicking on the center.

Importing Images

The software has a way to import the image from a folder from your hard drive. Once you click either of the two buttons: Click to Import Large Image button and Click to Import Small Image button, two options will be displayed on how to import the images.

Import Only One Image This option allows you to import only one image for the product/item.

Import from Folder You can import the whole folder to create many products or items with one click. If you have a selection of pictures for all your items and you want to create items based on pictures, you could click the Click to Import Large Image button with this option and you would be able to import all the images inside the folder.

Warning!

These are very extremely powerful options that you need to use carefully since they will import either one image or a hundred or even thousands of images with one click.

The warning is that this will create a new product with each image so if you have several images for one product then the advice would be either to put them in a different folder or you can even use a more sophisticated feature which is to copy and paste the path of those images into the system for additional images up to 6 and you can also add a video.

Import Directly From Camera Remember that these days, majority of the cameras act as a USB memory stick. In other words, you can connect your camera directly into your computer using a USB port and import directly the images from your camera. So it is possible to import either one by one or the whole directory in your camera and create products with one click. Usually, in cases that you have several pictures for only one product, the best way to do that is to click either of the import buttons such as the Click to import large image button and import the most important picture from your camera.

Scan If you have a scanner that is twine-compatible, you will be able to scan an image and put it here. While that could be a good idea, certainly it's not the easiest way so we have this SCAN option with button.

Inside the product zoom picture window

Once the main image area is clicked from the screen, a window will pop up. This window is called the Product Zoom Picture Window. Inside this window, you can also add and describe images.
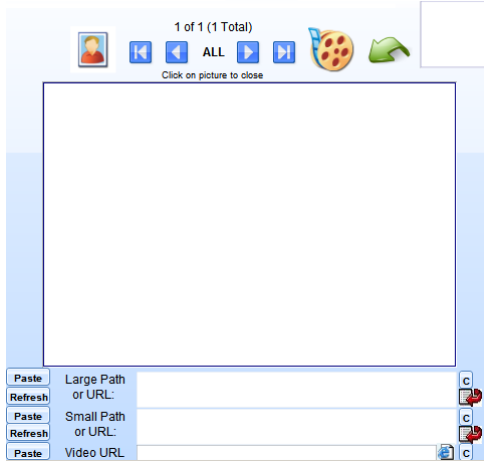

Image Description

Another important feature of Webstore Creator is a small description for each of the smaller pictures that you can add. Those descriptions will be there as a tool tip in the showroom.

Once you click on the image from the main screen, there is a small rectangular field on the top left of the pop up window that you can use as an additional description for the small picture on its right and it will show as a tooltip.

In some cases, you will need more than seven pictures probably. That would be very simple in that you will just have to add the same name with the small variation so you can have more pictures with the same product. For example: Camera-Front, Camera-Back, etc. You can have unlimited pictures of the same product as long as it has a different product code.

Image From Your Server

If you have the pictures online, it is also possible to enter those pictures into the system. To import for either the small or large picture, click the red arrow icon on the right side of the URL fields. It is also possible to paste the URL of the image inside the field.

You can use a different picture for the small picture but by default automatically it will have the same picture from the large one.

The refresh button is in case that simply it wouldn't show automatically which is very rare.

Image From Your Windows Clipboard

As you can see at the top of the product zoom picture window, you can also paste the image directly. Notice the image of a man at the top left of the window; it is used to actually paste the actual image that you have in your windows clipboard.

Adding videos to your showroom

To add a video, you need to add a video first in YouTube. When you already have your video uploaded in YouTube, you can then add the video inside the Product Zoom Picture window.

At the bottom of the screen is a text field provided for the Video URL. This is where the actual URL of the video is entered without any additional code. Potentially, it is possible to add other videos that are not in YouTube but in our experience the one in YouTube makes it real nice.

Getting The URL From YouTube

If you go to YouTube and you have a video that you want to include, under the video are buttons containing codes for sharing the video.

Click on the Share button and copy the URL provided below it. Paste this URL to the Video URL text field of the pop up screen.

To check if the video is displaying correctly, click the browser icon right beside the Video URL text field. This video will be displayed in your showroom. The importance of this is you are not taking space and resources from your actual showroom or your hard drive but you are hosting this video in a free service like you YouTube.

Selecting showroom options

At the bottom of the screen is a list of all the products added from all the showrooms. In this area is where you can manipulate and organize the products.

Code	Description	Order	R	Price	Tax	Weight	Stock	Status	Category	1	2	3	4	5	Hot Deals	Cart Button	Show Price	Show Product	Omit			
P-000002		1		$0.00			0	AVAILABLE		✕	☐	☐	☐	☐	☐	✕	✕	✕	Omit	☐	☐	🗑
P-000003		2		$0.00			0	AVAILABLE		✕	☐	☐	☐	☐	☐	✕	✕	✕	Omit	☐	☐	🗑
P-000004		3		$0.00			0	AVAILABLE		✕	☐	☐	☐	☐	☐	✕	✕	✕	Omit	☐	☐	🗑
P-000005		4		$0.00			0	AVAILABLE		✕	☐	☐	☐	☐	☐	✕	✕	✕	Omit	☐	☐	🗑
P-000006		5		$0.00			0	AVAILABLE		✕	☐	☐	☐	☐	☐	✕	✕	✕	Omit	☐	☐	🗑

Code

The Code Column is where the product codes are displayed. The product code is the code that will identify the specific product which will be shown inside your web showroom. Note that you cannot edit the product code in the Code Column. The code can only be edited in the Product Details area just above the columns.

Description

This column is where the description for the products is displayed. This too, like the code column, cannot be edited. It can only be edited in the Product Details area just above the column. It can also be sorted either ascending or descending at the top of the column.

Order

This column cannot be sorted, but you can change the order number which actually influence the order by clicking the R button to the right of the order name and that will lead you to replace with the different number that will affect the order of the current product.

On the other hand, you can just click the order area and change the order number.

Price

The price column is where the prices of the products are displayed.

This can't also be edited unless you go to the Selling part of the Product details area and edit the price of the product there.

Tax
If the product is taxable, the tax column will be marked by a check. The tax column is influenced by the task checkmark in the selling area at the top center.

Weight And Stock
The weight comes from the purchasing area at the top right and the stock that also comes from there.
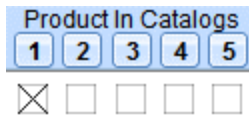
Status
The status column is where the status of the product is displayed. The status can either be available, back ordered, or discontinued. This column can also be sorted by clicking at the top of the column.

Category
This column is where the category of each product is displayed. This can also be sorted by clicking at the top of the column.

Items in showroom
Notice the five buttons among the columns.

These five buttons represent the five showrooms containing the products. Once the product is check marked under a certain button, this means that the product belongs to that particular showroom. So it's very easy to understand that the same product can belong to different showrooms.

And also it is very easy to uncheck and to unselect products for a particular showroom. But also if you click in one of those five buttons, you will receive a pop up window where you can select, clear the check marks, or omit the ones that are check marked. From the selection, mark them if you have selected something or sort them.

If the selection option will be equivalent to click in the showroom selected to the center of the screen where you have the five buttons and that will be the same thing.

Hot Deals

This column, if you are using the link/label explained in the setup section, the products/items that you mark here will be displayed additionally in the hot deal section. So if there is something that you want to high light like the offer of the day for example, this could be ideal to select the hot deal and maybe modify the product price which can be done very quickly and put it back the next day.

So by doing that, you can have deal of the day you can change the label in the setup area and have this offer as the deal of the day.

Cart Button

The cart button, as the name implies if you check the cart button, then the car button will be displayed in your showroom which interacts with PayPal. Otherwise it will not be shown and it is ideal to display with or without price. But without letting people to buy your products and this can be done by each product separately. So some of them could be available, could be sold, and others cannot.

Show Price And Show Product

The show price and show item columns show the price of the product as well as the product itself or not by checking or un-checking the checkbox of the product.

Using the showroom as a shopping cart

Optionally, you can use your showroom as a shopping cart. In order to do that, you need two things:

3.   One is to have your PayPal email that has to be from a business account so you can receive money in your bank account. Your PayPal account should be entered in the showroom setup in the cart email. The rest, you can leave the same code that comes with the software. To go inside the showroom setup area, click the Web Store Setup icon from the upper left of the screen.

4.   The second is to have the Cart Button column check marked for the products that you want to have a PayPal card button. Obviously, you need to have also the show price because no one will buy without seeing the price and the cart also needs the price for it to work.

Be sure to that you have clicked the Setup Upload in the Showroom Setup in order to upload the setup that contains your PayPal email.

After check marking the Card Button and the Show Price for the item/s that you want to use in your showroom that can be purchased with your PayPal account, be sure to click Web Store upload icon from the screen to upload the entire showroom in order to make the appropriate changes.

Finding, Searching, and Selecting Products

The Find Button

The most obvious way to search is the Find button at the top of the screen. When you click this button, you can search in the different fields like status, category, groups, etc. Just type anything that you want to find just like the description for example and the records that have those words will be selected automatically.

Also, once you click this button four options are given: Web Store ALL without Images, Web Store All with Images, Quick Find, and Full Find. The options Web Store ALL with or without images can automatically be clicked without having to type any word in the find field since it will find ALL the items/products with or without images.

The Black Arrow

Another way to search is by using the black arrow. The black arrows located at the right side of the several fields in the main screen such as the Dates, Item Code, Status, and Category. It will filter the database by the content of the field on its left.

So for example, if we have a product code and we click the particular black arrow, the product code will be selected automatically. Also if in the list of products, we click the black arrow, it will select all products with the same category.

The A To Z Buttons

Also, you can use the buttons from A to Z that are on top of the lower part of the main screen and is above the code and description columns. These buttons will automatically select the products or items that start by the particular letter selected.

The Omit Buttons

In order to select different products, you can omit them (not delete them) by using the omit button that is present on each line almost at the end of the line. By clicking on it, the product will be omitted that conserve to omit certain products that you want to check or uncheck in the different buttons Hot Deal, Card Button, Show Price, and Show Item.

If you click the omit button with the SHIFT key, the particular product will be selected. In other words, it will omit everything except that product.

Also at the top of the omit buttons column, there is an additional omit button that has an additional functionality that relate to the position of the selected product in the list of products. It will also let you omit above or below that list.

The Check Boxes

Another way to select and mark products is by using the last two check boxes and either checkmark them or not. Using the check mark icons at the top of the buttons, you will find several options that will let you select, clear, or mark those records based on if they are check marked or not.

By combining these techniques, you will have an incredible power to select products and make changes to them. One technique could be if you want to uncheck the Cart Button for a certain category. So instead of going to check each record and uncheck its Cart Button, you could select the whole category with one click by clicking the Cart Button at the top of the column. You could use that button to uncheck the whole category with one click.

Modifying data in bulk

There are several fields that have a capability of making changes in the fields in a fast way. Those fields are the fields on the screen that have the R button (R for Replace) on their right side. Such fields are the Category field, the Status field, the Price field, the Manufacturer Price field, the Shipping and Handling field, the Taxable field, etc.

With those fields, you can do a selection by finding and selecting the items that you want and then you can replace all of them in bulk.

If you made a mistake, there is no undo feature so you need to be sure of what you are doing otherwise, it can go to undesirable consequences.

Set based on cost and price buttons

In particular, to make changes to the price and in addition to the R buttons, there are two other buttons below the Selling area at the center right of the screen where you can change the price. The price will be displayed in the showroom based on the cost or based on the actual price. In other words, you can either put a percentage or put a positive or negative number.

So for example, if you want to add up a mark-up profit of 30 dollars over your cost, you can click the Set Based on Cost button and put 30 dollars and click either current or selected to make changes to all selected items or just the current product. If you do it this way, it will be extremely easy later on to reduce that amount but in that case you will use the Set Based on Price button.

So in both cases, you can do a lot of combination using percentages or a fixed positive or negative amount and use it to modify in bulk one or hundreds of products with one click.

Uploading a showroom to your server

Assuming that you have done the setup work and tested the setup account and that you have uploaded the setup and the main files as explained from the previous pages, you can upload very easily a showroom just by clicking the Web Store Upload icon in the upper left part of the screen.

That will upload the selected showroom among the five available with one click. When you click the icon, you will be presented with an option to also upload the images or to just simply to upload the data.

No!

In the case that you upload the showroom with the images too, if the images are not in your hard drive, select the NO option because there is nothing to upload in terms of images. Also, if you have uploaded the images once and you haven't made any changes to those images, select NO because you only need to upload the images one time. You don't need to upload the images every time that you make changes to the data in your showroom.

Yes!

Additionally, if you had made changes to certain images but not all the images, select only those images using the omit buttons, etc. and select the images that you want to upload and say YES. Only those images selected will be uploaded, the rest will stay there so the whole showroom will go correctly even though you have uploaded a few images because this is assuming that you have uploaded all the images previously.

Submitting your showroom to Google

Webstore Creator has an integrated submission button that you can use to submit your website to Google located inside the Showroom setup.

Inside the Showroom setup, select the showroom that you want to use among the 5 showrooms and click the Google submission button and your website will be submitted to Google automatically.

Viewing and printing products as a catalog

Webstore Creator has an integrated viewer where you can see all your items in a catalog format that is used locally in your computer. Just click the View Catalog icon and the item selected will be displayed in your product catalog.

Inside The Products Catalog Area

Once inside the catalog area, you have the option of having a slideshow, email the catalog to your clients, print the catalog in your regular printer or as a PDF with our PDF driver or E-fax the products. You can also select different formats of 9, 4, 2, or 1 per page and a list form to print the catalog. When you use the email option, automatically the PDF printer driver is invoked and it is used to create a PDF attachment as a catalog that you can email or put in a CD to send to your prospects.

Website Upload Manager

This exclusive feature of the software lets you store websites that you find interesting from browsing the internet where you can retrieve them anytime. Also, it lets you grab the content of the particular websites so as to analyze its structure and discern some of their secrets as well.

The Website Upload Manager actually has different areas for the list of domains and for the list of web pages of a certain domain. When you enter inside the Website Upload Manager, the default area displayed is the one for the list of domains. The area for the web pages, on the other hand, can be accessed through the Go Pages Selected button on the top left part of the area and through the Go button found on every domain field line in the domains list.

How To Access

Expert View Screen > E-commerce tab
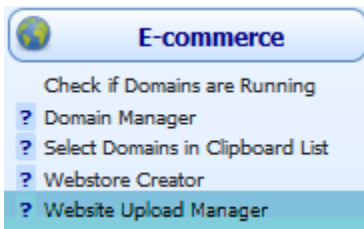
Business & Miscellaneous

Credit Money Machine Net

Conversions Utility

Conversions utility, like any other conversion systems, is used to convert between types of measurements. It has several types of measurements to select as well as unit of measurements by which the measurements will be converted.

How To Access

Expert View Screen > Business & Miscellaneous tab

FAQ and Trouble Ticket System

FAQ & Trouble Ticket System is an integrated client support system that is used to track some type of problems and frequently asked questions that might or might not be related in your marketing business.

In the FAQ & Trouble Ticket System, you can have unlimited categories with unlimited questions and answers in each category. Also, each time a client asks for questions, the system will personalize each answer with the client's contact information. You can even record your answers and play them over the phone for your customers directly from your computer.

   Adding Questions in a Category
   Using Contacts and Agent Information in the Answer field

How To Access

Expert View Screen > Business & Miscellaneous tab
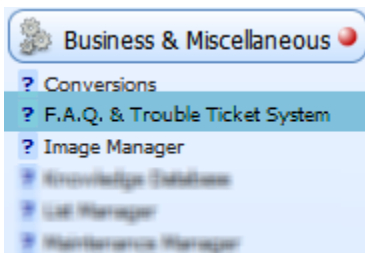
Adding Questions in a Category

1. If the category already exists, select the category in the Category section using its drop down field.

   On the other hand, to add a new category, click Add Category and enter its name in a pop up dialog box.

2. Click the Add Question button

3. Enter the question in the Question Selection field.

4. Enter the predefefined answer in the text area provided below the Related Files field.

5. Click the R button to refresh all new questions added under the selected category.

Using Contacts and Agent Information in the Answer field

1. Select a contact to be used in FAQ and TT System from the main screen.

2. Currently, the agent logged in will be used.

3. In the text area, click on the spot where to put the information of the contact or the agent the way you want to use it.

4. Then, under the Merge Symbols tab, select the provided buttons with information of the contact and agent by clicking on them.

Image Manager

Image Manager is part of the software where you can keep track of all the images you have created and used through your company's endeavors. Also, aside from images, you can store any type of data such as reminders, audio messages, audio phone conversations, lists, etc.

In the Image Manager, you have the Cabinets and the Folders. A Cabinet refers to the storage of a list of any type of data. It groups the data and compiles them in a list. On the other hand, a Folder refers to the data that is being stored by the Cabinet. It represents any type of data to be stored and compiled in a list.

Note you cannot add a folder without a cabinet. Hence, a cabinet is created first before adding a folder.

Adding entries to the Image Manager
Creating shortcuts to important cabinet entries

How To Access

Expert View Screen > Business & Miscellaneous tab
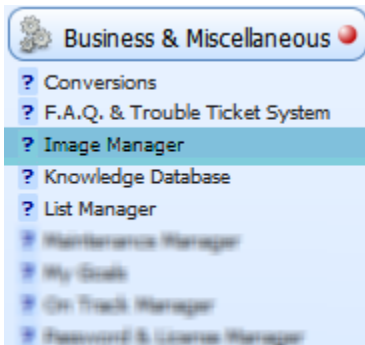
Adding entries to the Image Manager

1. For a new cabinet, click the Add Cabinet button. Then, replace the default cabinet title with the new Cabinet Name.

   To add entries on an existing cabinet, select the Cabinet by clicking the dropdown list beside the Select Cabinet button.

2. Now to add a file in the cabinet, click the Add Folder button.

3. Enter the name of the file in the Folder Label field.

4. In the description field, click the import button. The import button will allow you to choose the folder directory from your hard drive where the file is stored.

   There are two ways the import button will allow you to do: Add ONE FILE or ALL FILES in a folder.

5. **Optional**
   Provide an image for the file by clicking the image field or the import button beside the image field.

Creating shortcuts to important cabinet entries

In the case where you have thousands of cabinets stored in the Image Manager, you can have a link of shortcut for those that are most commonly used.

To do this:

1. Select a cabinet

2. Click the Save To button

3. Select which of the shortcut fields that you want to store the shortcut for the cabinet selected

4. Click the selected shortcut field

To clear or delete a shortcut on a cabinet:

1. Click the Clear To button

2. Click the shortcut field of the cabinet that you want to clear or delete

List Manager

The List Manager creates lists and keeps them stored for easy retrieval of future use. For example, you can import list of URLs or maybe a list of ID of Twitter users or any other kind of list and hand them handy to export them for future use inside the software or somewhere else.

How to manually add list items
Add list items by importing
What to do with the seven check boxes
Copy all list items based on the marked checkboxes

How To Access

Expert View Screen > Business & Miscellaneous tab
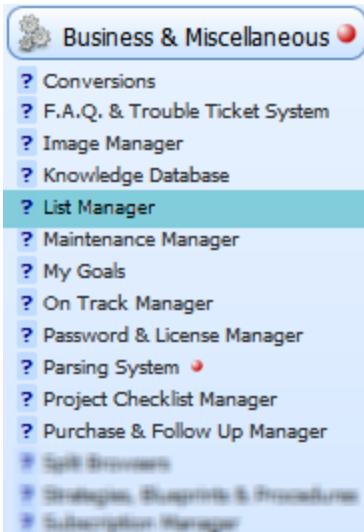
How to manually add list items

In order to manually add list items, just click the Add List Item button. Then, enter the provided fields such as the List Item Name, Group, Provenance, and Content/Keywords.

Provenance
The Provenance field is where you enter where the item belongs or where the item came from.

Add list items by importing

Aside from manually adding list items, you can also import. This is when you have hundreds of list items to add.

You can import list items from your contacts database, from your clipboard, or from a file in your hardrive.

To do this, click the Import/Select List Items button.
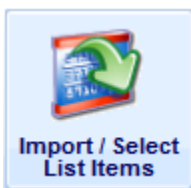
Note that if you import list items from the contacts database, only the URL and Email information can be imported.

What to do with the seven check boxes

You wonder why there are seven check boxes for each list item.
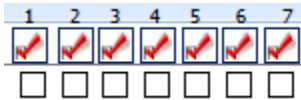
These check boxes represents any kind of mark that you want to remember them by. For instance, you want to have all the items from the list that starts with A and mark them all to checkbox number seven.

So, everytime you click the check with the checkbox labelled with seven, all items that starts with A will be displayed.

Copy all list items based on the marked checkboxes

To do this, click the Copy List To Windows Clipboard button.
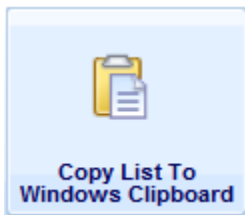
Then, you will be asked what column from the checkboxes you want to copy. Automatically, when you paste in any text editor, the list will be pasted.

Maintenance Manager

Maintenance Manager is where you keep the conditions of your hard drives and other utility equipments so that they can be managed properly in terms of when they were commissioned and the months they were under maintenance.

How To Access

Expert View Screen > Business & Miscellaneous

Goals Manager

Goals Manager is a simple but effective area to delineate your company goals to encourage you and your employees to achieve them. This way, it is easier to manage and plan the specific dates of when to achieve your goals for you or for your company. This also helps in prioritizing goals that are within reach.

How To Access

Expert View Screen > Business & Miscellaneous tab
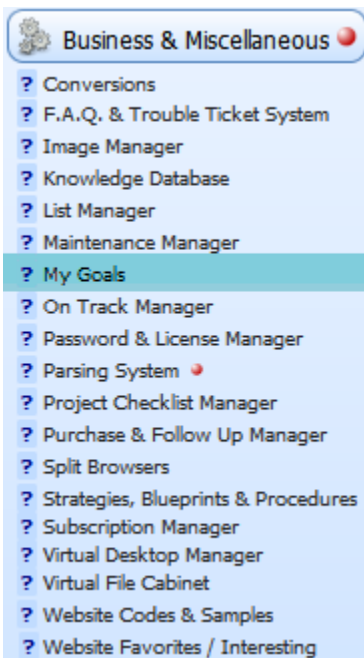
On Track Manager

The On Track Manager is part of the software that lets you create a list of marketing projects or things that you have to do where you can be able to keep on track on them.

Moreover, you can enter situations, things that you have to do or milestones that you want to achieve every day or in any time and you can keep track if you have done them or not and how well you have done them.

It can be viewed directly on the main screen which makes it easy for you to check on them anytime you want without having to go to a new screen.

> **Milestone list**
> **Objective and Subjective Points System**
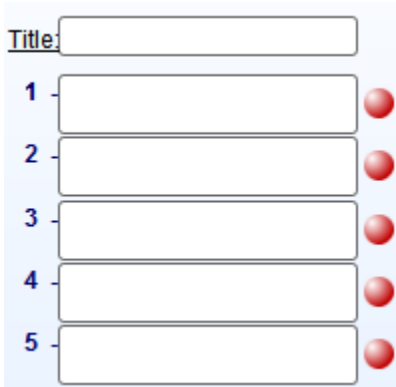
How To Access

Expert View Screen > Business & Miscellaneous tab
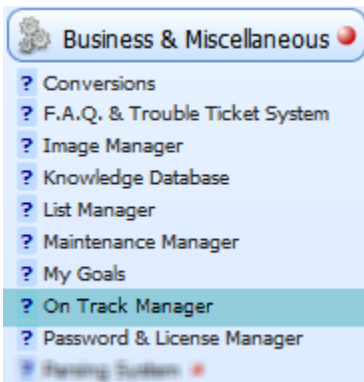
Milestone list

When you add a record in the On Track Manager using the Add button, the software will create a set of fields for the newly added record. These fields are where you enter the milestones that you want to keep track.

On every set of milestones is the name or the title for it. Just enter the title of the set of list in the Title field and enter the milestones on the fields numbered from one to ten.

Also notice the red icons beside every field. These icons are action button that runs or executes the content of its corresponding field from the left.

Objective and Subjective Points System

The Objective and Subjective Points System is used by the On Track Manager to determine how well you have done on what is there to do in the list. This also helps you to manage very well and keep you on track what is left to do from your list of milestones.

Aside from the action buttons that corresponds to every milestone field, there are also the objective and subjective values fields that also correspond to the milestone fields.

Objective and Subjective Value Fields

What you enter in the objective and subjective value fields depends on what you what you want to accomplish.

Note that the Subjective Value ranges only from one to ten; one being the lowest or least effective and ten being the highest or most effective.

For example, you might want to "force" yourself to call 40 people in a day so the objective value would be the number of calls that you did and the subjective value would be based on the number of effective calls that was made.

Maybe you called 40 so that is great but the effectiveness of the calls were poor so the subjective value would be five for example or maybe you called only five so the objective value would be five but maybe you sold to everybody so subjective would be ten on account for its effectiveness.

Password & License Manager

When many people in your company need access to the same websites and services, it's hard to tell everyone every password they need all at once. Password and License Manager is where you can save your password of all your websites and services in cases when you have thousands of them. This area itself can be access - protected on a user level.

Adding a website/software entry
How to generate passwords for newly created accounts

How To Access

Expert View Screen > Business & Miscellaneous tab
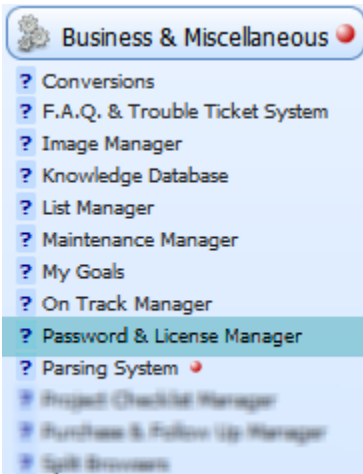
Adding a website/software entry

1. Click the Add button

2. Enter the software or website

3. In the File Location or URL field, enter the location of the software
    or website

4. **Optional**
    Enter the group in the Group field where the entry belongs. This is
    helpful in order to categorize entries for easy search.

5. Checkmark the Used checkbox if the entry is still active. Otherwise,
    leave it uncheck.

6. Enter the Username and Password that are necessary for access in
    the entry you added.

    In order to hide these information and become unreadable for
    humans, you can encrypt them using the Encrypt button. To decrypt
    them back to their normal form, click the Decrypt button.

7. Enter the description of use in the provided field at the right of the
    Username and Password fields.

How to generate passwords for newly created accounts

For your newly created accounts, there is a Password Generator that will randomly generate a password based on your selected options. Here's how:

1. Click the Add button to add the website or software that you want to create an account.

2. Enter the name of the software/website in the Software/Website Name field.

3. Enter the URL of the website or file location of the software in the provided field.

4. In the Username field, enter the username of the new account.

5. Then, click the Password Generator button.

6. A windows dialog pop up will then be displayed allowing you to choose how the password will be generated.

    Enter the number of characters you want in the text field. Then, click what type of characters you want to include in the password: LETTERS + NUMBERS + SYMBOLS, LETTERS + NUMBERS, LETTERS, or NUMBERS

7. Automatically, it will be stored in your windows clipboard. Paste it in the Password field.

Project Checklist Manager

This area of the software is where you can store your proposed projects that you want to follow up for completion.

Adding a project entry
What to do once a topic on a project is done

How To Access

Expert View Screen > Business & Miscellaneous

Adding a project entry

1. For a new project, click the Add Project button and enter the title of the project in the windows dialog pop up.

    To add topics for an existing project, select the project in the Project dropdown list.

    Select Project By Clicking Field Below
    JAVA PROJECT
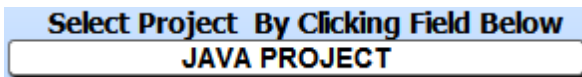
2. Once a project is set, click the Add Topic button to add a step or topic on the project.

3. Enter the title of the Topic in the Topic/Step field.

4. For a detailed description or steps in the Topic, enter its content in the Description text area.

5. **Optional**
    Insert an image for the topic in the Image field. Click P to paste the image directly or click the import button to look for the image in your hard drive.

6. Set the Due Date when the topic must be done in the Due field.

7. Set the status of the topic by clicking the Status field

What to do once a topic on a project is done

Select the topic and click the Done field. Once clicked, a small calendar will pop up allowing you to select the date. Automatically, the status of the topic will be changed to DONE.

Purchase & Follow Up Manager

It is a fact that all businesses in the market have lists of purchases they have made from other companies and are stored either electronically or manually. When you purchase items or expect items to arrive such as snail - mailed documents, money deposits, or anything that can have a due date for arriving or when you have items that have an expiration date that needs to be looked after; details about what type of purchase and the date on which the item is due are all very important.

In the Purchase & Follow - Up Manager, you can have a list of purchases or items and at the same time have a follow - up of how much the purchases are, when they must be paid, when will the items expire, or when must the purchase arrive to you. To sum up, Purchase & Follow - Up Manager lets you know what purchases you have NOT yet received.

How To Access

Expert View Screen > Business & Miscellaneous tab
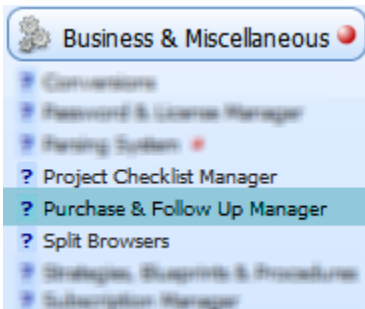
Adding a purchased item

1. Click the Add button

2. Enter the arrival date of the purchased item in the Due On field

3. In the Doc # field, enter the tracking number of the item

4. Set the status of the purchased item to Open in the Status field

   If the item has already arrived, set the status as Closed

5. Select the type of the purchased item in the Type field

6. In the Description field, enter the name of the purchased item

7. Enter how you paid the item in the Paid With field

8. Enter the website where you purchased the item in the Website field

9. Enter the amount of the item in the Amount field

10. **Optional**
    Lastly, insert a picture for the purchased item in the Image field. Notice the squared blank space at the top center of the screen area. Right-click on this blank space and select Insert Picture.

11. **Optional**
    To link the selected or current contact from the main screen, click the Link/Unlink button.

Split Browsers

Split Browsers is a very special feature of the software that provides splitting of two browser windows. This means that you can view two different websites at the same time in only one application. This is very different in the Open New Tab option of normal browsers in a way that in normal browsers, you can only view them one at a time.

How To Access

Expert View Screen > Business & Miscellaneous tab
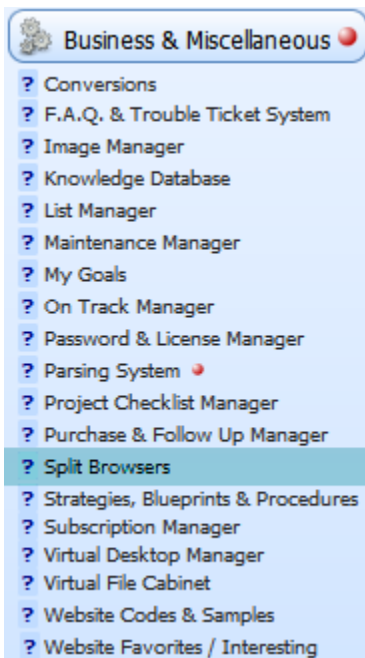
Cases you can use split browsers

The following are other various cases on which you can use the Split Browsers feature:

- ☑ It allows you to open the same website in both windows viewing the upper part of the website on one window while viewing the lower part of the website on the second one.

- ☑ You can browse websites on one window while watching online movies or videos on the other one.

- ☑ You can compare two different websites while looking at them at the same time.

Below is the screenshot of Split Browsers feature of the software. You can use the Reload button beside the URL field to refresh the web page.
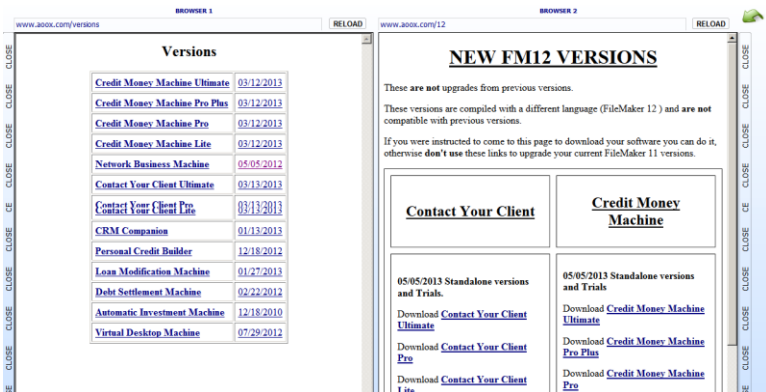
Strategies, Blueprints & Procedures

When you have strategies, procedure, or blueprints that you want to share to your company, this is where you can do them. It is like a repository of successful approaches for your business in one single area. It has also has a feature where you can import images for a specific procedure for clearer vision and description of a strategy.

How To Access

Expert View Screen > Business & Miscellaneous tab

Adding strategy, blueprint, or procedure entries

1. For a new category, click the Add Category button. Then, in the windows dialog pop up enter the name of the category.

   To add entries on an existing category, select the Category by clicking the dropdown Category list

   Click the CATEGORY field below to select

   STRATEGIC FOCUS P&G
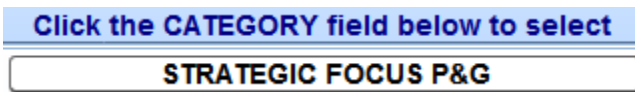
2. Now to add a topic in the category, click the Add Topic button.

3. Enter the name of the topic in the Topic Selected field.

4. In the text area under the Related File field, enter the content of the topic. There are some tools such as text color buttons at the right of the text area.

5. **Optional**
   Provide an image for the topic by changing the View of the screen through the Views buttons: Text & Image View, Title View, Category View, Text View, Image View

   In this case, you can select Text & Image View or Image View. Then click the import button or the other tools beside the image field to enter an image.

Subscription Manager

The software provides a Subscription Manager which makes sure you know and be reminded of the services you have subscribed. This way you will be sure you will not forget them when it comes to re-evaluate your costs.

The Subscription Manager is important in a way that by re-evaluating your costs to the products or services you have subscribed, you will know how much and when it must be paid.

How To Access

Expert View Screen > Business & Miscellaneous tab
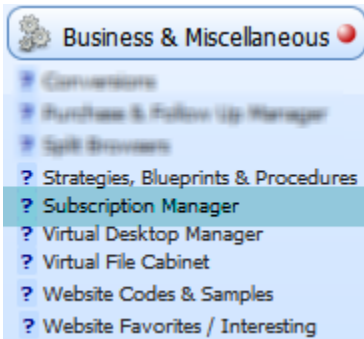
Adding a subscription entry

1. Click the Add button

2. Enter the title or name of the subscription entry in the Description field

3. **Optional**
    Enter the group name of the entry in the Group field or click on it to select for existing groups.

4. In the Period field, select the period for when the subscription must be paid: Weekly, Monthly, Yearly, Other.

5. Enter the start date you have subscribed to the entry and the end date when it will end in the Start and End Date fields.

6. In the Amount field, provide the amount the subscription must be paid based on the period you have set in the Period field.

7. Click in the Active checkbox if the subscription entry is still active or not.

8. In the CC Expiration field, enter the expiration date of your credit card. This is used for you to check when your credit card expires so you know when to change another one for the subscription entry.

9. Enter notes about the subscription entry in the Payment Notes field. You can use the import button if you want to import or link a file to the subscription entry.

10. **Optional**
    To link the selected or current contact from the main screen, click the Link/Unlink button.

Virtual File Cabinet

Virtual File Cabinet is part of the software where you can store any type of data or computer files in a more organized manner and can easily be retrieved. You can use it for all kinds of collections such as reminders, audio messages, audio phone conversations, list, etc.

In the Virtual File Cabinet, similar to the Image Manager, you also have the Cabinets and the Folders. A Cabinet refers to the storage of a list of any type of data. It groups the data and compiles them in a list. On the other hand, a Folder refers to the data that is being stored by the Cabinet. It represents any type of data to be stored and compiled in a list.

Adding entries to the Virtual File Cabinet
Creating shortcuts to important cabinet entries

How To Access

Expert View Screen > Business & Miscellaneous tab
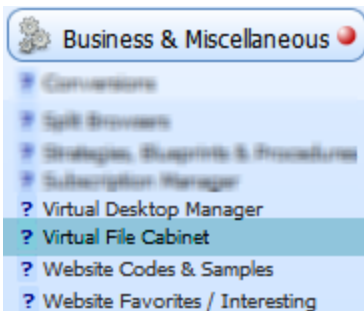
Adding entries to the Virtual File Cabinet

1. For a new cabinet, click the Add Cabinet button. Then, replace the default cabinet title with the new Cabinet Name.

   To add entries on an existing cabinet, select the Cabinet by clicking the dropdown list beside the Select Cabinet button.

2. Now to add a file in the cabinet, click the Add Folder button.

3. Enter the name of the file in the Folder Label field.

4. In the description field, click the import button. The import button will allow you to choose the folder directory from your hard drive where the file is stored.

   There are two ways the import button will allow you to do: Add ONE FILE or ALL FILES in a folder.

5. **Optional**
   Provide an image for the file by clicking the image field or the import button beside the image field.

Creating shortcuts to important cabinet entries

In the case where you have thousands of cabinets stored in the Virtual File Cabinet, you can have a link of shortcut for those that are most commonly used.

To do this:

1. Select a cabinet

2. Click the Save To button

3. Select which of the shortcut fields that you want to store the shortcut for the cabinet selected

4. Click the selected shortcut field

To clear or delete a shortcut on a cabinet:

1. Click the Clear To button

2. Click the shortcut field of the cabinet that you want to clear or delete

Website Codes & Samples

In creating your company website, sometimes you need a list of useful scripts to primarily assist the task of web maintenance.

With the Website Codes & Samples Manager, you will be able to store useful scripts with samples and description that is helpful in a way that it is easier to understand since it acts as a guide for functions in creating a website in general.

Also, you will be able to grab the whole amount of script or code from a particular website and save it in the Website Code & Samples Manager to analyze and study on it.

Adding a website code/sample
Adding an existing website code
Grouping similar web code entry

How To Access

Expert View Screen > Business & Miscellaneous tab
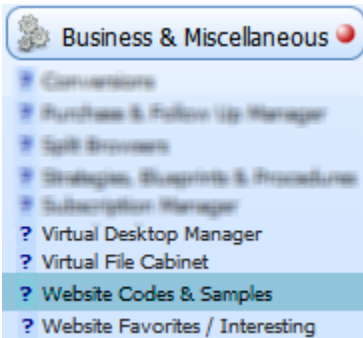
Adding a website code/sample

The main function of Website Code & Sample Manager is that it is used to save samples of website codes or scripts. This is very helpful in a way that you can store here web scripts or codes together with their use in the website content structure. With this, when you get confused with them again, you can just look for them in the Website Code & Sample Manager and find its description.

To save a basic web script or code, click the Add icon and enter the basic fields for it: TITLE, CONTENT, and NOTES & KEYWORDS. In any cases, you can also fill in the other fields as well.

Content Field
In the content field, you can view the content of the code by clicking the icon next to the Get button. Clicking this icon also allows you to not only view the code but also copy and print it. The same goes to the C button which also copies the content to the clipboard.

Also, to enter or view the content in a large text area, just click on the Content field. You will then be directed the area where there are provided default scripts and where there is a way to edit the content and view them in an internal browser.

Notes & Keywords
The Notes & Keywords field is where you enter the description or use, notes, or keywords related to the web code/script entry.

To view it, click the icon next to the field. You can also import a file in the field using the import icon with the red arrow. To run the imported file, click the red action button next to it.

Adding an existing website code

Aside from simply adding a web code/script sample in the Website Code & Sample Manager, you can also add an entire website code from an existing and manually edit them yourself.

To save a whole website code, click the Add icon and enter the URL of the website in the URL field. Once you have the URL in the URL field, you can click the Get button beside the Content field to grab the whole script of the URL into the Content field.

Grouping similar web code entry

Through The Group Column
In the list of websites located at the center area, there is a column named Group where the group name of the website is entered. Automatically, the website will be assigned to what is entered on its Group field.

With this, when you click the black arrow icon beside the Group field, the software will filter and display all the websites that belong the group based on the left field.

Through The Group Selector Button
Beside the General Notes fiel is the Group Selector button and text field. All the groups of the Click to Set buttons are automatically included in the drop-down text field of the Group Selector column wherein all the groups are displayed on a list.

To select and display all the websites with the group of your choice, just click on the drop-down text field and select which group to display. It will automatically display all the websites that belong to the selected group in the list of websites at the center of screen.

Website Favorties / Interesting

While browsing the internet, there are times when you bump into a website in which you find interesting or websites that you like for its look. Sometimes, you also find the greatest websites for your marketing or for many other purposes. In these particular cases, plainly saving the websites is too simple similar to saving files from the internet to your computer.

In the Website Favorites/Interesting Websites Area, you are able to save interesting websites in one place where you can manage them or analyze their structure and maybe even copy their secrets.

Adding a website entry
Grouping website entries

How To Access

Expert View Screen > Business & Miscellaneous tab

Adding a website entry

1. Click the Add button

2. Enter the title, group, URL, and keywords of the website entry in the provided fields.

3. **Optional**
   You can grab the source code of the web page using the Grab It button beside the URL field. Once clicked, the source codes will then be automatically entered in the Content of Webpage and Notes field.

   To view the whole content, just click the field or the magnifying glass beside it.

4. **Optional**
   To link the current or the selected contacts to the website entry, click the Link/Unlink to Current Contact button.

Grouping website entries

Through The Group Column
In the list of websites located at the center area, there is a column named Group where the group name of the website is entered. Automatically, the website will be assigned to what is entered on its Group field.

With this, when you click the black arrow icon beside the Group field, the software will filter and display all the websites that belong the group based on the left field.

Through The Click To Set Buttons

In the Website Manager, you can see several buttons piled in one line that are all labeled Click to Set wherein each button has a text field. These buttons are used to save important groups containing a list of websites that are used most frequently.

To group websites using these buttons, select a website with the desired group to set and click on any of the Click to Set button. Automatically, the name of the group will be entered on the text field below the clicked button.

Through The Group Selector Button

On the right most corner of the Click to Set buttons is the Group Selector button and text field. All the groups of the Click to Set buttons are automatically included in the drop-down text field of the Group Selector column wherein all the groups are displayed on a list.

To select and display all the websites with the group of your choice, just click on the drop-down text field and select which group to display. It will automatically display all the websites that belong to the selected group in the list of websites at the center of screen.

Other Tools

Credit Money Machine Net

Compare Contacts

Many times it is very useful to be able to compare and update contacts in order to recognize one contact from the other.

To compare the First Two Contacts or the Last Two Contacts, click the the Compare Contacts button under the Other Tools tab in the main screen.

To compare the current contact displayed on the main screen and the contact after it, click the Compare Contacts button with SHIFT+CONTROL.

Important Note To Remember Only two records or contacts can be compared at any one time. In the case that you have more than two records selected and you want to compare, you will to have to omit the other records momentarily. To do this click the OMIT button or through the LIST view of the contacts.

In the case where you have more than two contacts selected, we suggest that you find the two contacts to compare one by one using the Find button from the main screen and manipulate their contact information fields such as the Referrals, Related To, What They Do, or Keywords by filling - in the same info.

This way, when you do a Full Find through the Find button, you can use the info you set for them in the said fields and select both of them.

Comparison screen

Once two contacts are selected to be compared, the two contacts will be displayed in the comparison screen where you can compare and modify them.

Note that once two contacts are compared, they will be automatically selected. In this case, once you go back to the main screen using the Back button, the only ones selected are the two contacts.

Notice the blue arrows facing left.

These arrows indicate that the contact on the left is the one that will be updated. Also, these arrows are used to transfer and override information to the left contact in general.

Buttons (for comparing duplicates)
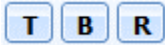
T buttons adds the particular information of the duplicate contact before the existing contact information of the original contact in the contact information field.

The B buttons adds the duplicate contact information after the existing contact information of the original contact.

The R buttons replaces the original contact information to duplicate contact information

Check For Duplicates

There are instances where contacts are duplicated, entered twice by errors, or were entered automatically while importing data. Sometimes, these mistakes are unavoidable. In order not to be confused on contacts with almost the same information, you can compare and select as well as update them in the system.

Options for checking duplicates
Contact ID vs Regular
View duplicate results

How To Access

To check for duplicates, click the Find Duplicates button under the Other Tools tab in the main screen.

Options for checking duplicates

Current This option checks for possible duplicates based on the current contact against the whole database of contacts.

Selected VS All This option checks for duplicates from the selected contacts against the whole database of contacts.

Selected VS Selected This option checks for duplicates for the selected contacts also from the selected contacts. It will check if the selected contacts have duplicates with one another.

Restore Duplicates Highlite If you have recently cleared the highlights of the duplicates, you can still restore them using the Restore Duplicate Highlite button. Using this option, you don't have to select or sort for duplicates all over again in order to see the highlights on the duplicates when viewed on the selectable fields list.

Selected VS All On URL This option checks for duplicates from the selected contacts against the whole database of contacts with the same URL.

Sort Duplicates The Sort Duplicates option sorts all the duplicates from your set of contacts in a way that they are located under the original contact from where they are duplicated once they are viewed in a list.

You can then view the sorted duplicates in a list by clicking on the List icon and going into the Selectable Fields View. Once there, notice that the duplicate ones are highlighted in red and the original ones are highlighted in white.

Clear Duplicate Highlite When you select or sort duplicates, automatically once you display them on a list using the selectable fields view, the duplicates are highlighted with red. In the case where you don't want any highlight on them, you can clear them using the Clear Duplicate Highlite option.

Selected VS Selected On URL This option checks for duplicates for the selected contacts also from the selected contacts. It will check if the selected contacts have duplicate URLs.

Selected VS All On Email This option checks for duplicates from the selected contacts against the whole database of contacts with the same Email address.

Selected VS Selected On Email This option checks for duplicates for the selected contacts also from the selected contacts. It will check if the selected contacts have duplicate Emails.

Contact ID vs Regular

You can select between considering the REGULAR fields or consider the CONTACT IDs

| Cancel | CONTACT ID | REGULAR |
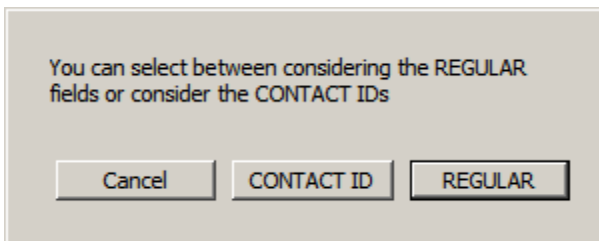
This option is shown after having selected the options from which to find the duplicates. These two other options will help the software base the searching of duplicates.

Contact ID Once you choose this option, the software will search for duplicates based on the selected contact's individual contact ID. The software will search for contacts against the whole database on contacts with duplicate contact IDs.

Regular This option will search for duplicates based on the selected contact's regular fields from the contact information. The software will search for contacts with having duplicate contact information fields.

Note that the selected contacts from the checking of duplicates can be navigated using the navigation bar located at the uppermost part of the main screen. The contacts that are not candidates for duplicates are temporarily omitted in the list. However, they can be retrieved by clicking the ALL button from the center of the navigation bar.

View duplicate results

Once the duplicates are checked, the results can then either be displayed in the main screen and navigated using the navigation button or displayed in a list using the Selectable Fields View.

For easy list view, go to the list contacts under the Contacts tab and select mini. Then, click the synchronize button.

To show highlights on duplicated contacts, do the following steps:

1. Click the List Contacts button under the Contacts tab

2. Select Full

3. Click Multiple List Views button

4. Click Selectable Fields View button

5. In the Selectable Fields View screen, click on the particular information fields of the duplicate contacts to be displayed.

Parsing System

The Parsing System allows you to add new contacts from text, HTML pages, emails, etc while extracting information that you have in your Windows clipboard. If you receive a confirmation email from your website about a purchase, you shouldn't have to retype the information contained in the email to your database. The Parsing System will import the data all at once.

Moreover, if you have a humongous list of contacts information on your clipboard, you can click the parsing scheme of the Parsing System relevant to the clipboard data and the contacts will be inserted into your database.

Parse list snippet
How to add a parse scheme entry
How to select a parse scheme
How to execute the selected parse scheme

How To Access
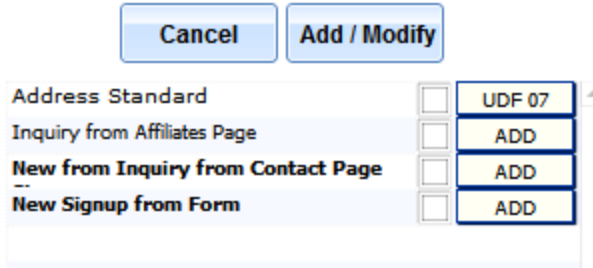
Simple/Advanced View Screen > Other Tools tab

Expert View Screen > Business & Miscellaneous tab

Parse list snippet

When you access the Parsing System, you will be presented by a Parse List Snippet where all the parse options are displayed.

The Parse List Snippet contains the parses that you have made inside the Parsing System. In the list, there are checkboxes from which you have the option to checkmark. When you mark a checkbox of the parse option of your choice, it will be the selected parsing scheme when you add a contact using a parse.

Notice that beside each parse on the list is a selection field consisting of ADD and REPLACE options. The ADD option is used when you want to add a contact with new information using a parse. The REPLACE option however, is used when you want to replace the information of an existing contact with the parsed information.

How to add a parse scheme entry

1. Open the Parse list snippet by clicking the Parsing System button from the main screen

2. In the snippet, click the Add/Modfiy button to access the Parsing System.

3. In the Parsing System, click the add button

4. Enter the parsing scheme title

5. Enter the parse scheme description in either the short or full tab.

6. To complete creating the parsing entry to parse newly added contacts, enter the information to parse(extract) in the fields provided in the Parsing System.

   For example, if you have a text that says that you have copied: State: TX you can parse (extract) the word TX and put it in the state field by putting in the State Parsing field the word "State: " and as end RETURN and then it will extract the word TX

How to select a parse scheme

1. Open the Parse list snippet by clicking the Parsing System button from the main screen

2. Checkmark the selected parse entry. Note that you can only checkmark one parse entry to extract text for your new contacts.

3. Select ADD or REPLACE. Use ADD when you want to add a contact with new information using a parse. Use REPLACE when you want to replace the information of an existing contact with the parsed information.

4. Click Cancel to go back to the main screen.

How to execute the selected parse scheme

Notice that at the top right of the Parsing System icon as well as the Parsing System button, there is a small tiny little red button.

This special RED BUTTON is used to execute without prompting the default parse that is currently check marked in the Parsing System. Note that when there is no default parse that is set or check marked, a windows dialog will be displayed.

Virtual Desktop Manager

Virtual Desktop Manager is an extension of your Windows Desktop and much more, allowing you to control and run your files and programs from one place. Compared to your Windows Desktop, in Virtual Desktop Manager, you can have unlimited files and programs where you can group and assign descriptions.

Add a dekstop entry
Find icons for entries
Find information on entries
Create shortcuts on the entries
How to reorder desktop entries
How to execute the desktop entries

How To Access

Simple/Advanced View Screen > Other Tools tab

Expert View Screen > Business & Miscellaneous tab
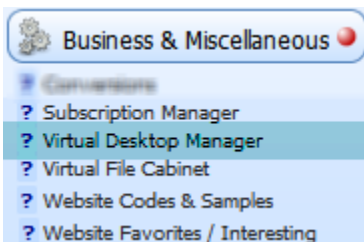
Add a dekstop entry

1. Click the Add Button.

   Once button is clicked, a new entry box will then be created.
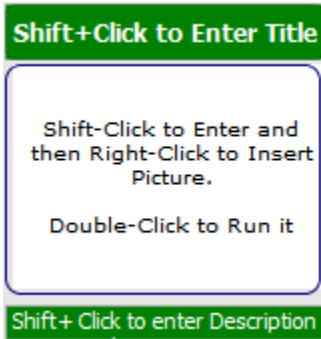
2. In the Title field, enter the title of the entry by clicking the field with SHIFT and deleting the default title.

3. Click the description field with SHIFT and delete the default text inside the field. This sets apart from having them in your Windows Desktop because in Virtual Desktop Manager, you can directly see the description of the item entry.

4. Right-click on the image field and select Insert Picture. You can also select Paste Bitmap if you have your copied picture in your windows clipboard.

Find icons for entries

Using the Title of the desktop entry, Icon Finder will look for logo images on the internet. To do this, select the desktop entry and then click the Logo Finder button.

Using your chosen logo from the results, you can directly copy the logo by right-clicking on it and select Copy. Then, in the Virtual Desktop Manager screen, right-click the image field and select Paste Bitmap.

Find information on entries

Google Finder, as opposed to the Icon Finder, will look for information of the selected desktop entry in Google. This can help you to put something in addition on the description field of the entry. To do this, select the desktop entry and then click the Google Finder button.

Create shortcuts on the entries

In the Virtual Desktop Manager screen, notice that there are seven buttons labeled EMPTY by default. These EMPTY buttons are called SHORTCUT buttons. The Shortcut buttons are used if you want to directly display certain desktop items in one click.

Set Labels On The Buttons
Click any of the buttons and select SET LABEL.

Buttons Assign1 to Assign7 correspond to the EMPTY buttons in successive order. This means that to enter a label on the first Empty button, you have to select ASSIGN1 after the label is inputted on the text field, ASSIGN2 to the second Empty button and so on.

Set Entry To A Shortcut Button First, select the desktop entry. Then, click the shortcut button to where you want the entry to be included. Click MARK CURRENT. In the case where you have selected several entries, you can set them all the same time by clicking the MARK SELECTED button.

Exclude Entry From The Shortcut First, click the entry or selected entries. Then, click CLEAR CURRENT from the dialog box in the case where you only have to exclude the currently selected entry. Otherwise, click CLEAR SELECTED in the case where you have selected several entries and you want to exclude them all the same time.

Select, Omit, Expand Shortcut Entries In the dialog box that is displayed once you click a particular shortcut button, you have the OMIT, SELECTED, ALL, and EXPAND buttons. To display entries included in the shortcut button from either ALL or SELECTED entries available, click ALL or SELECTED button, respectively.

The OMIT button is used to omit the entries included in the shortcut button. This way, the entries omitted will not be displayed on the screen. Once the entries included in the shortcut button has been omitted, in order to display them back without affecting the already displayed entries on the screen, click the EXPAND button.

How to reorder desktop entries

Given a long list of virtual desktop entries, you can also move and reorder them. This way, the entries that are more important and constantly used can be placed first on the list.

Based on the list view To change the order of a desktop item, go to the list view by clicking the List View button.

Then, click the order field of the entry and select the number of the order from the ORDER column. You can reorder the entries in increasing order value by clicking the column. To reorder them in decreasing order value, click the column again.

Based on Group To sort desktop entries based on the group where they belong, click the Sort button beside the Current Group label.
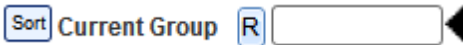
Based on Category To sort desktop entries based on the category or the sub-group where they below, click the Sort button beside the Current Sub Group label.

How to execute the desktop entries

Similar to how the desktop items in your Windows Desktop runs, the entries in the Virtual Desktop Manager that you have manually added runs also the same way. To do this, there is a field that you have to enter for the file path of the desktop entry.

In the FILE TO RUN field, enter or import the path of the file where your desktop entry is found. In the case where you have an extra file for the entry, you can enter it in the Related Files field.

The R button, on the other hand, is used to replace the path for selected desktop entries. This is useful when you move the program to a different computer where path could be different

Beside the import button of the File to Run field is the PWD button or the Password button. This button is used to set the username and password for your file in cases where the access to the file is protected.

Using File To Run You can run the entry using the File to Run action button. Click this button to execute the file item in the File to Run field.

Using The Item Desktop Image The list of entries has the image field for every desktop entry. To execute the desktop item, just double click on its image field.

Knowledge Database

Knowledge Database is a database of consumer credit and financial-related documents, articles, resources, etc. It includes credit-related laws and information, and advice on getting and building credit, choosing and using credit cards, and almost everything a consumer might want to know about mortgage loans. Also, in the Knowledge Database you can enter all kind of texts, links to PDF, DOCs, URLs and any information that you find on the Internet or anywhere for that matter.

How to add an entry
Upload topics and categories to server
Link a topic to a contact

How To Access

Simple/Advanced View Screen > Other Tools

Expert View Screen > Business & Miscellaneous tab
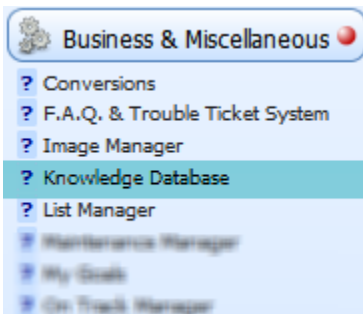
How to add an entry

1. Add or Select a Category

   Add category

   a. Click the Add Category button
   b. Enter the category name in a windows dialog
   c. Click the R button to refresh the newly added category. This will empty the topics under the new category from the previous topics displayed in the topics list.

   Select category

   In the event where you only want to add an entry from an existing category; you can just select the particular category from the Category List. You can select a category by clicking the drop-down field under the Click Below To Select Category Label.

2. Click Add Topic button

3. Enter topic title in the Topic Selected field. To emphasize certain words in the topic title, just highlight it and select any of the four colors at the right side of the field.

4. Enter topic description/content in the topic description text area. The Topic Description text area has four tabs as shown in the figure below.
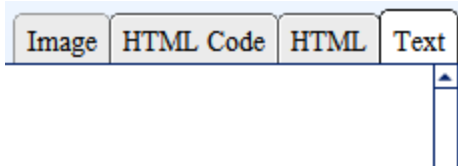
If the content only contains simple text, write the topic description under the Text tab. On the other hand, if your content is an HTML file, write the html code under the Code tab. The HTML tab will be used to preview the result of the html code inside the Code tab.

5. **Optional**
   To attach a file in a certain topic, just enter the file path of the file or the URL of the file in the Related Files field. You can also directly import a file from your hard drive using the import button beside the field.

6. **Optional**
   Provide an image for the topic entry, go to the image section below the topics list.

7. Click the R Button beside the category title to refresh the topic entries list.

Upload topics and categories to server

To include a topic to be uploaded to the server, mark the check box on the topic. You can also include all topics under a certain category by clicking the T button.
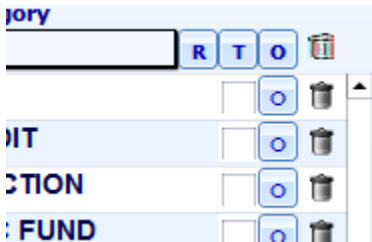
Link a topic to a contact

Linking a topic to a contact is useful if you want to affiliate the contact with a certain topic. For example, a topic about How to make a credit report is especially created for Portia McFann.

Note that you cannot link a contact to a category. Only topics can be linked.

To link:

1. Select a contact from the main screen. The currently displayed contact on the main screen will be used inside the Knowledge Database.
2. Click the topic in the Knowledge Database.
3. Click the Link/Unlink button.
4. You will be provided with a windows dialog that will allow you to select whether to link the contact to the current topic (from step 2) or to the selected topics (if you havent clicked a topic)

To unlink:

1. Click the topic that has the linked contact.
2. Click the Link/Unlink button.
3. You will be provided with a windows dialog that will allow you to select whether to unlink the contact to the current topic (from step 1) or to all topics where the contact is linked.

Reports & Labels Menu

Reports and Labels Menu lets you view and print many reports and it contains a plethora of other useful items like business cards, CD labels, and more.

The Reports are templates that you can use such as business cards or templates for envelopes. They are provided by the software for you to use in your contacts so there will be no hassle to manually enter contact information one by one on templates such as business cards and envelopes or letterheads.

Select reports with selected contacts
Report Preview
Labels Menu

How To Access

Simple/Advanced View Screen > Other Tools tab

Expert View Screen > Reports & Labels tab
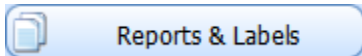
Select reports with selected contacts

1. Select contacts.

    Through the Contacts Scope section

    Through the Contact Groups section

    You can review how to use the Grouped Contacts in the Contact Groups chapter of the manual.

2. **Optional**
    Select Company. Some report templates requires company information such as the Business Cards report template.

    To select a company to use for the report templates, as shown in the figure below, click the black arrow.

SELECT "MY COMPANY" TO USE IN CERTAIN REPORTS
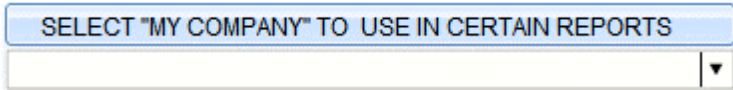
It will open a snippet of company lists where you can choose from. In the case where you have to use a company that is not on the list in the snippet, click the SELECT MY COMPANY TO USE IN CERTAIN REPORTS button to add a new company.

3. Select what report template to use by clicking the report title from the reports list at the left side the screen. Once you have selected a report, automatically, a sample view of the selected report will be displayed at the center.

Report Preview

Once the selection for the report with the contacts to use is done, you can preview the expected output using the Preview Report button. You can also preview the report by clicking directly the report sample that is on the center of the screen.

The software will then provide you two options of what preview of the selected report to display.

Preview This will display the selected report with the information of all the selected contacts filled in to the fields in the report sample in a page form.

Browse This will display the selected reports with the information of all selected contacts filled in to the fields in the report sample in a continuous form.

Labels Menu

Aside from the reports along with the selected contacts, you can also print Manila, Spine, and CD labels as well as business cards of your choice. This feature is located at the bottom part of the Reports and Labels Menu screen.

Client Valuation

From the root word VALUE, client valuation means determining the value of a client. Client Valuation calculates the true customer value of a client based on the inputted objective and subjective values.

The software provides four default customer values description for you to rate: the Sales or Potential Value, Expense Value, Difficulty Factor, and Importance Factor. The other fields are for you to fill-in. There are also other fields below the True Customer Value fields that are used to define the selected contact.

How To Access

Simple/Advanced View Screen > Other Tools tab

Expert View Screen > Contacts tab
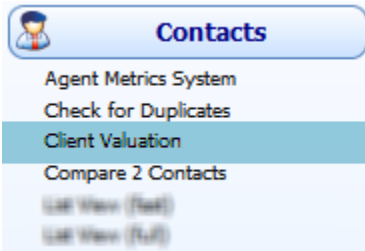
Agent Job Scheduler

The Agent Job Scheduler is part of the software where an agent can be assigned with a job by another agent. This way, every agent logged-in in the software will be able to communicate with each other based on what they want other agents to do. Also, the agent currently logged can also assign a job for himself.

How to assign a job to an agent
What to do once job is done

How To Access

Simple View Screen > Other Tools tab

Expert View Screen > Time Related tab
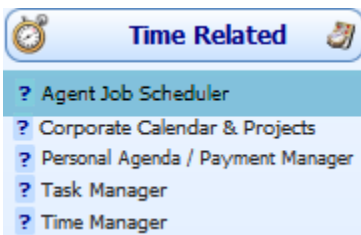
How to assign a job to an agent

1. In the Agent Job Scheduler screen, click the Add button

2. Select agent

3. Enter the job in the Job Title field

4. In the Job Date & Time field, enter the date & time the job must be done. By default, when you add a job for an agent, the Job Date is set to the current date the job was added.

5. Enter description of the procedure to the job in the provided text field. This way, the assigned agent will not be lost on what to do with the job assigned to him.

6. **Optional**
   Link a contact to the job entry. To do this, you have to select a contact first from the main screen.

What to do once job is done

Once the job is done, the agent can click the DONE button beside the Job Title field. The job done will then be temporarily omitted from the list. In the case where you display all jobs assigned to the agent including those that are done, they will be distinguished through the job's ACTION TAKEN field.

All jobs that are done will have a history text entered in the ACTION taken field.

Leads Finder

This will let you search in Google Maps leads based on their Zip Code, City, County, and State.

How To Access

Simple/Advanced View Screen > Other Tools tab

Expert View Screen > Marketing & SEO tab

Setup

Credit Money Machine Net

Agent Privileges

Not every user of the system needs to have full access to all the areas of the software. In the Agent Privileges area, you can delegate privileges so that low - level users of the software can have limited access to crucial areas.

Set what screen to display when software is accessed
Request payment
Automatic tasks & notifications
Allowed information fields
Allowed area
Agent list and how to reorder them
Format envelope with the selected agent as recipient
Action logs of agents

How To Access

This feature is located inside the Setup screen. You can also just click the red button right above the Setup button as shown below.

Set what screen to display when software is accessed

Initially, when you enter into the software you will be displayed with the SIMPLER View screen. You can change this through the **Initial Level** field in the Agent Information Section: 1 as in SIMPLER VIEW or 2 as in EXPERT VIEW.

Initial Level [1] (?)

Request payment

| Company | | ▼ | Payments by |
| E-mail | ▼ Currency USD | | PayPal |

In the case where the agent requests payment, you can use this area of the Agent Privileges located right under the Agent Information section. Note that the software only allows PayPal transactions.

Enter in the Company field the company that you want the agent to see when receiving the payment. Also, enter in the Email field your email that you have in PayPal.

Automatic tasks & notifications

This area is where you can set automatic tasks and transactions of an agent.

Note that the events of actions setup in this section will only be effective if you click the Start button. The events will stop on the next login. This mean that in order to stop the events you have setup, you have to log out from the system and log in again.

Allowed information fields

To control the agent's access to certain contact information fields in the software, check mark the check box of the fields that you don't want the agent to access and modify.

Allowed area

This area of Agent Privileges is where you can control the agent's access to certain areas in the software. By default, the agent with rank Agent or Executive are limited to certain areas. On the other hand, if the agent is an Administrator, all the checkboxes are empty which means that he is allowed access to all areas in the software.

To set all the checkboxes, click the S button. To clear all the marked checkboxes, click the C button.

Agent list and how to reorder them

At the right part of the Agent Privileges area is a section for the list of all agents added in the software. The agent info included in the list is their status and rank in the software. You can change the agent's status by clicking on the status field. The rank, however, can only be changed in the Agent Information section.

Reorder agents

You can modify the order of the agents in the list. There are two ways to do this. One is by manually entering the order number inside the order field. Another way is through the BLUE ARROWS below the order fields. Click on the blue up arrow to move the agent one line up. To move the agent one line down, click on the blue down arrow.

Sort agents

To automatically sort the agents by their name and status click on the SORT BY STATUS & NAME button. This will also automatically change the number of orders in the order field.

Format envelope with the selected agent as recipient

The Envelope button is used to format an envelope with the assigned default company as sender and selected agent as recipient ready to be printed from the software.

Note that before accessing the Envelope area, select an agent and default company first. The selected agent will be automatically filled-up in the fields of the envelope information

Action logs of agents

The Log button is used to enter into the Log System where it records the agent's transactions from specific areas in the software such as the Account Receivables and the Task Manager.

To record action logs from an agent, you can go to the Miscellaneous Screen under Setup and check mark YES under the LOG ACTIONS FOR AGENTS.

Company Information

The Company Information area is where you can add companies to be used as default companies by certain areas in the software.

Add new company record
Delete company record
Duplicate company
Assign default company

How To Access

Company Information is located inside the Setup screen.

Add new company record

1. Click the ADD button at the right side of the screen.
2. Provide the company's information in the given fields at the center of the screen.

Delete company record

Click the garbage bin button located at the right side of the particular company record to be deleted.

Duplicate company

Duplicating a particular existing company means automatically copying all information of the company and pasting it to the new company record. To duplicate, select the company and click the Duplicate button.

Assign default company

While there is a list of company records added to the system, you can only choose one among the list that is to be set as a default company to be used in certain areas of the software.

To do this, you have to select from the list by clicking on the particular company. Then, click on the ASSIGN CURRENT AS DEFAULT COMPANY button.

Dialing & Miscellaneous

Change access password

Change the default calculator

Set default City, State, and Country when adding a new contact

Set default invoice type when adding a new invoice

Set phone parameters and options

Set phone number format on particular countries

Show label names as tooltips inside fields

Set minimum time to consider in Time Manager

Local System Format

Using an in-the-cloud software and with no access to the windows directories

Printer setup

Use local path instead of net paths

Don't highlight selected lines

Log actions for agents

Letter head text field

Letter head image fields

Country efax code

How To Access

Setup tab > Setup button > Miscellaneous tab

Change access password

Below is the part of the Miscellaneous area where you can change the default password which is 12345. Note that only the password can be changed. The user name will always be user.

Click Here To Change The Encription Password
WARNING: This Is Not Your Agent Password
If You Change This Password And Forget It
We Won't Be Able To Help

Change the default calculator

In almost all the areas in the software, you can notice that there is always the calculator button where you can use to calculate digits. By default, the software provides the location of the user's system calculator with the path C:\WINDOWS\system32\calc. exe.

Type the Address of your Windows Calculator
C:\WINDOWS\system32\calc.exe

In the case that you have your own cool calculator software in your system that you use, you can change the default path by deleting it in the field and replacing it with the path address where your calculator is located. You can also use the import button to open your directory and locate the path.

Set default City, State, and Country when adding a new contact

When you add a new contact in the software, you still have to input the contact's information in the contact information section. Included in the information is the contact's city, state, and country, where the contact is currently living in.

CITY: [   ]   STATE: [▼]   COUNTRY: [▼]

In the case where you want to add or import several contacts that belongs in the same city, state, and country, you can set it here. Just enter in the respective fields the values so that when you add or import contacts, it will be their default state, city, and country.

Note that if you leave the fields empty, there will be no default city, state, and country when you add new contacts. Also, the city, state, and country of the old contacts will not be affected by the change. Only the newly added contacts are affected.

Set default invoice type when adding a new invoice

When you add a new invoice in the Invoice System, by default you will be asked what type of invoice you want to create: Products or Services.

TYPE: ● ASK ○ PRODUCTS ○ TEXT

Mark the Ask option if you still want the windows dialog asking what type of invoice you want to create. Mark the Products option to add a Product Invoice by default or the Text option to add an invoice that is of Service type by default.

Now, notice the Reset Last Invoice Number field.

Reset Last Invoice Number

1002

The number on the field is the invoice number of the last invoice created in the Invoice System. This means the when you add a new invoice, the invoice number would be 10004 based on the Last Invoice Number above. You can reset by changing the field. For example, if you put 10006, the new invoice would be 10007.

Set phone parameters and options

Phone Parameters
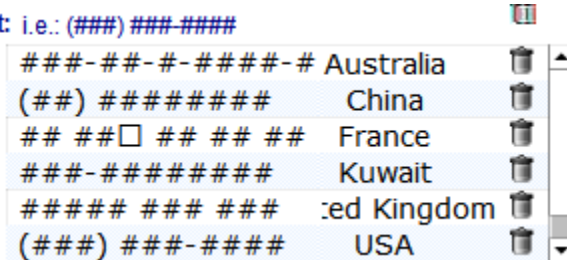
YOUR AREA CODE:	
ADJUST FOR DAYLIGHT SAVINGS:	☐
SHOULD I DIAL MY AREA CODE?:	○ Y ● N
SHOULD I LOG THE CALLS?:	● Y ○ N
OUTSIDE LINE PREFIX (COMMA = PAUSE):	
DIAL WITHOUT SHOWING NUMBER?:	○ Y ● N
USE RINGCENTRAL, EFAX, MYFAX OR FAX?:	EFAX
USE MODEM OR SIP=X-LITE OR SKYPE?	○ MODEM ●
DEFAULT COUNTRY:	USA

Set phone number format on particular countries

This is where you can setup the phone number format of particular countries. This is important in the phone number information of your contacts. It will check if the phone number format is compatible to the country.

Show label names as tooltips inside fields

Notice that in particular areas in the software where there are fields, when you hover on the field, the label name is displayed as a tooltip.

In the case that it bothers you and you don't want a tool tip displaying when you hover on the field, you can turn it off in this part of the Setup area.

Set minimum time to consider in Time Manager

Once an agent logs in to the system, the Time Manager will automatically start the count the agent worked. By default, if the agent is only logged for 10 minutes, then it will not be considered in Time Manager. Thus, it will not be included in the record list. To change this 10 minute default time, just enter the new time in the provided field.

Minimum Time To Consider In Time Manager `10`

Local System Format

There are different information in the software such as the Date Format that is different for every country in the world. By default, the software sets any information format compatible to the software. To set it according to the Local System format of your local computer, click the Y.

Use Local System Format ◯ Y ● N

Using an in-the-cloud software and with no access to the windows directories

I'm using the software in-the-cloud and have no access to the Windows directories ☐

This option is used to indicate that you have the software installed IN-THE-CLOUD and you don't have access to the Windows directories, and because of that, documents like PDFs, DOCs, attachments and similar files will be saved to special database fields and not to their regular Windows directories.

Printer setup

To set what default printer to use when printing any document from the software, click the Printer Setup button.

Use local path instead of net paths

Use Local Path instead of Net Path ☐

This field is used to indicate if you want to use C:\Program Files\Credit Money Machine xxx \ instead of Z drive in a server that you intend to access using RDP or Remote Desktop Protocol

Don't highlight selected lines

Don't Highlight Selected Line in Lists ☐

This field is used to indicate if you want to highlight the line in lists when moving from line to line as shown in the figure below. Usually this is a good idea but requires a flicker of the screen.

Log actions for agents

Log Actions For Agents
◯ YES ● NO

This is where you set if you want to record any activities of the agent in the software. This will be recorded inside the Log System. The activities involve access and transaction in the areas of the software such as the Task Manager.

Letter head text field

Letterhead Text Fields
HEADER

FOOTER

This is where you enter the text in the header and footer of your letterhead or envelope that will be used in some areas of the software.

Letter head image fields

Letterhead Image Fields

HEADER (image size 540 x 90 Points)

FOOTER (image size 540 x 90 Points)

This is where you enter the image to be used in the header and footer of your letterhead or envelope to be used in some areas of the software. Note that to enter image in the fields, just copy the image and paste it in the fields by right-clicking the mouse.

Country efax code

Country Efax Codes

ADD COUNTRY

Afghanistan	93
Albania	355
Algeria	213
American Samoa	684
Andorra	376
Angola	244

The software provides several countries with their EFAX codes. In the event that you want to add a country or a region in your country and their EFAX codes, just click the ADD Country button.

FTP & Internet Related

This is where you can specify your FTP options and Internet related settings so you can upload systems from your website to the software or upload certain features of the software to your website.

How To Access

FTP & Internet Related is located inside the Setup screen.

Group & Field Labels

This is where you can customize the labels of default groups, action buttons, and default fields within the software.

The action buttons
Modify group fields
Set user defined fields for new contacts
Assign new contacts to a group
Limit users of the software on certain groups

How To Access

Group & Field Labels is located inside the Setup screen.

The action buttons

The action buttons can be seen more in several places in the software than the group and user defined fields in the face of the AB buttons.They are used if you want to access a document, a website, or any file that you can easily get.

Set action or location of the executable file on the action buttons
To define what to execute on each buttons, use the import button to enter the location of the executable file. Also, if you have the path where the file is located, just paste it directly on the provided field. The path can be a URL or a directory from your computer drive.

Modify group fields

When you install the software, the groups are given default names such as EMPTY 01 and SP2. To change this, just click the name directly and type its new name. Once the change has been done, automatically when you go back to the main screen or to the area where you can find the group, the group names will be changed.

Set user defined fields for new contacts

When you modify a group name, it will automatically change regardless of the contacts or members already assigned to it. In the user-defined fields, when you change the field names, the recent contacts will not be affected. In short, any change in the user defined field names will not cause the user defined information of the recent contacts to change.

In the case that you want to modify a user defined field name, just click the field and type the new name. Now when you add a new contact, it will have the modified user defined information fields.

Assign new contacts to a group

Notice that in every group, there is a check box just.

Click a checkbox to mark the particular group. This will automatically be checked by default once you add a new contact to the software which means that the new contacts will now be included in the particular group automatically.

Limit users of the software on certain groups

In order to specify who among the users of the software can access a group, there is a field on every group beside the check box as shown below.

Click on the dropdown field and select whether AD, EX, or AG. AD means the administrator can only access the group. EX means the administrator and the executive ranks can only access the group. AG means all three ranks can access the group but only the administrator and executive can uncheck it.

Import Export Backups

Import - Export - Backups is a special feature of the software where you can import and export contacts and other information, including creating backups of the software.

Import from other formats
Export to other formats
Import list of files to clipboard
Import from Outlook Express
Import from QuickBooks
Extract emails from clipboard
Import contacts from backup
Local Backups

How To Access

Import Export Backups is located inside the Setup screen.

Import from other formats

This will import to the software lists with formats different from the default format of the software such as Excel. The software also provides a feature that saves five different import sets for easy import on the next transaction.

Export to other formats

This will export from the software selected databases. Once clicked, it will display a selection of area in the software of where to extract database from to be exported outside the software.

Contacts
When exporting contacts from the database, you will be given two choices of how contact information is exported.

The Field Names option will export the contacts in a tab-separated text file format while the Label Names option will export the contacts in a CSV format.

Phonebook, Domains, Agenda, and Virtual Cabinet
When exporting these areas from the software, the software will export them in a tab-separated text file format.

Import list of files to clipboard

This will import a list of files, folders, or both files and folders from a selected file directory in your hard drive to be pasted to your windows clipboard.

Once a file directory is selected, it will display the options of what to import from its content: files, folders, or both files and folders. After selecting one of the given options, you will then be able to paste them in your windows clipboard based on the selected choice.

Import from Outlook Express

This will import contacts from Outlook Express into the Phonebook or the full contact database. With this, you need to export the contacts from Outlook Express to an intermediate database.

Also, the following steps must be followed for successful import from Outlook Express:

First, open Outlook Express. Then, go to "Tools" - "Address Book".

Here, click on "File" - "Export" - "To Other Address Book."

In the next pop-up window, select the option "Text File (Comma Separated Values)" and click the "Export" button.

Click the Browse button and go to the directory where Credit Money Machine is installed, usually C:\Program Files\Credit Money Machine xxx

Once there, type import. csv and click the Save button.

Now, click the Next button and select ALL the fields in the list.

Finally, click "Finish"

Now, your contacts from Outlook Express have been exported to the database import. csv.

The last step is clicking on the button above which lets you select between importing into the Phonebook or the Contacts Database.

Import from QuickBooks

This option assumes that two files are present in the program directory. One Excel file named QuickbooksI. xls with Invoices exported using a third party software that you can buy using the button provided in the windows dialog displayed once the Import From QuickBooks button is clicked and another Excel file named QuickbooksC. xls with exported from QuickBooks.

Extract emails from clipboard

This will extract emails that you have copied from your clipboard. Once you click on this button, you will be presented by a set of instructions which just basically tells you to copy the set of emails from your clipboard.

Automatically, the software will import these emails creating a record for each email in the software. After importing them into the software, you will be displayed with the main screen along with the new records from each email.

Import contacts from backup

This will import the backup of contacts that you have created from the Local Backups area.

Local Backups

Local Backups is where you can store Contacts backup in the safety of your selected file directory from your hard drive where it can be easily retrieved when accessed. Once you click this option, you will be directed to the Local Backups area where you can add several backups for your contacts in the software.

List Labels

In the software, there are certain fields that when you click on them, a drop down list is displayed. In the List Labels area of SETUP, you can modify and manage the predefined drop down list.

Note that the lists in the list labels area are used throughout the program especially when you have pull down list to select from.

> **Strategy Status List**
> **Sales source commission levels list**
> **Agenda classification list**
> **Invoice terms list**
> **Invoice discount list**
> **Invoice/Receivable COA payment type list**
> **Invoice ship via list**
> **Product Status list**

How To Access

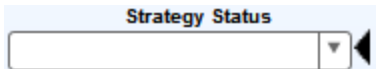List Labels is located inside the Setup screen.

Strategy Status List

STRATEGY STATUS

0- COLD LEAD
1- WARM LEAD
2- QUALIFIED LEAD
3- PRESENTATION
4- HOT LEAD
5- FULFILLMENT
5- SALE LOST
6- DORMANT

This is found inside the Task Manager. When you click on the Strategy Status black arrow, the list of strategy status will be displayed.

Strategy Status

Sales source commission levels list

COMMISSION LEVELS

.05
.1
.15
.2
.25

This is found in the Commission field in the basic contact information section.

Agenda classification list

AGENDA CLASSIFY

Birthdate
Business
Insurance
License
Marketing
Personal
Subscription
To Call
To Cancel
TO-DO

The Agenda Classification can be found inside the Personal Agenda & Payment Manager screen specifically under the Classify button. Once you click on the classify field, you will be displayed with the list of Agenda Classification.

Invoice terms list

INVOICE TERMS

15 NET
30 NET
60 NET
90 NET
COD
PREPAID
30-60-90

The Invoice Terms can be found inside the Invoice System just above the Private Notes field at the bottom of the Invoice screen.

Terms

Invoice discount list

INVOICE DISCOUNT
5.00%
10.00%
20.00%
25.00%
30.00%

The Invoice Discount can be found inside the Invoice System when you add a **product** invoice. The discount field is located in the product description area that is at the center of the invoice screen.

Discount

Invoice/Receivable COA payment type list

INVOICE / RECEIVABLE COA PAYMENT TYPE

VISA
Debit Card
Check
Cashier's Check
Money Order
Cash
MasterCard
American Express
Discover
CC Other

This list can be found in two areas of the software: Accounts Receivable and Invoice System.

Accounts Receivable

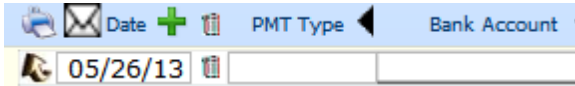1.   The list can be found in the Group/COA field

Group / COA ◀

2.   The list can also be found inside the Accounts Receivable's Alternate View in the PMT Type field

PMT Type

Invoice System

The list can be found when you invoice an entry and make a payment. This can be found at the bottom part of the Invoice screen.

Invoice ship via list

This list can be found inside the Invoice System just above the Private Notes which is located at the bottom of the invoice screen.

Product Status list

PRODUCT STATUS

BACK ORDERED
DISCONTINUED
AVAILABLE

This list can be found inside the Products & Inventory area. The area can be accessed inside the Invoice System using the Products button.

Inside the Products & Inventory is the Status list located at the left side of the screen.