



Sails Science

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SailQuoter

Quick Start Guide

Installing SailQuoter

- Insert Disk 1 into your Mac
- Double click the SailQuoter.sea file
- Select the folder on your hard disk to save SailQuoter into
- Insert Disk 2 when prompted

Want a Windows version of the demo? Contact Sails Science

Launching SailQuoter

To launch SailQuoter double click any of the SailQuoter files or the SailQuoter program, it does not matter which, you are automatically taken to the same starting place.



Setup Wizard - Preferences



Setup Wizard



Preferences

To quickly customise SailQuoter to your loft you should work through the Basic Settings/Company Information Setup Wizard. You will then be ready to create quote and order printouts customised for your loft.

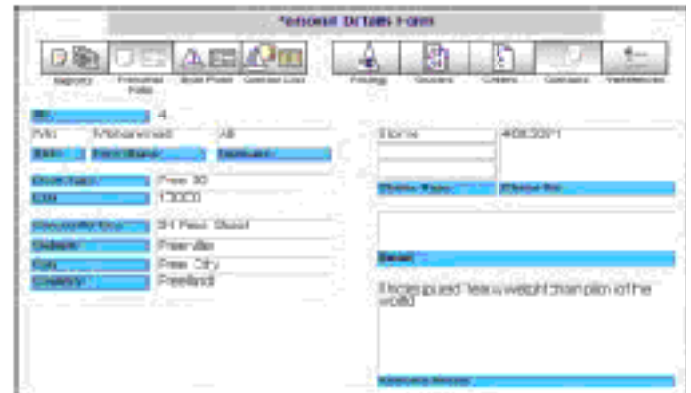
The Preferences also lets you adjust prices and other settings and customise text.

Lists & Forms

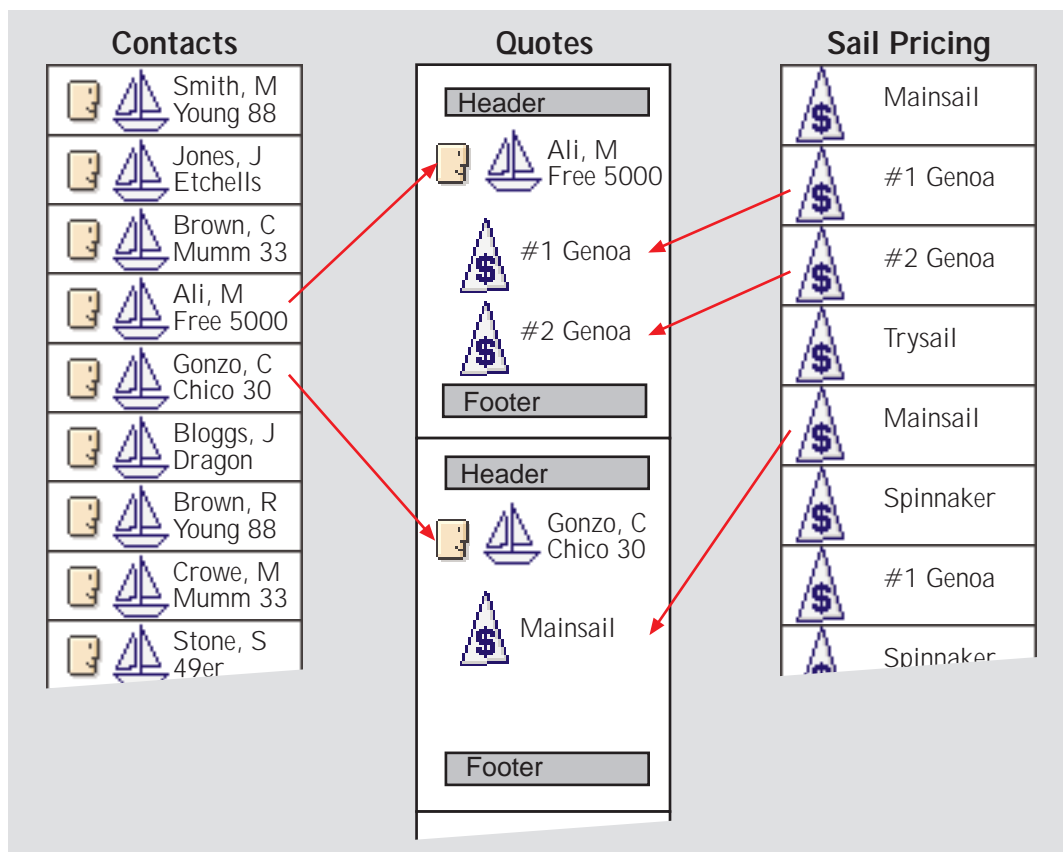
Many of SailQuoter's windows are either Lists or Forms.

Lists contain specific information about all the records in a file. For example the Contacts List displays only the customers name, boat and LOA. You can use the Contacts List to view all the customers on file. You can then sort these record and search for customers or boats.

Forms contain detailed information about one particular record in a file. For example the Personal Details Form lets you view and enter detailed information about one particular customer such as name, address, boat, phone numbers, email and any notes you may have.



How a Quote is made up from Contact and Sail Pricing information



Files & Records

SailQuoter is a database program that contains a collection of information, or data, that you can organise, update, sort, search through and print as needed.

SailQuoter uses a set of Files that contain information about related topics.

Each SailQuoter database file contains one or more Records. Each record holds all the information about a subject. For example the Contacts file contains all the information about each customer and their boat.

The Parts of SailQuoter



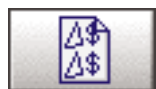
Contacts

The Contacts file records information about your customers and their boats. There is one record for each customer.



Pricing

The Sail Pricing file records the sails that form part of your quotes and orders. There is one record for each sail.



Quotes

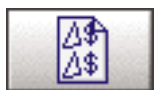
The Quotes file creates, prints and records your sail quotes. There is one record for each quote (which may contain more than one sail).



Orders

The Orders file creates, prints and records your sail orders. There is one record for each order (which may contain more than one sail).

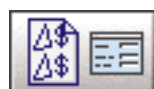
Creating a Quote - Follow these Step by Step Instructions



Quotes

First Step, Create a new Quote

- Click the **Quote** button, this takes you to the **Quote List**.
- From the **Mode** menu select **New Record**. This creates a new blank quote record.
- Click the **Quote Form** button. The **Quote Form** gives detailed information about the quote.



Quote Form

Now complete the sections of the Quote Form

Choose a customer for the quote, this can be done in two ways:



Choose an existing customer

OR

Create a new customer record

- Click the **Select Contact** button.
 - You are now taken to the **Contact List**.
 - From the **Contact List** select a contact.
 - Use the **Personal** and **Boat Forms** to update detailed information about the contact.
 - Click **Continue** to return to the **Quote Form**.
- Click the **Select Contact** button.
 - You are now taken to the **Contact List**.
 - Click the **New Contact** button.
 - Enter in your customer details.
 - Use the **Personal** and **Boat Forms** to enter detailed information.
 - Click **Continue** to return to the **Quote Form**.



Add sails to the quote

- Now click the **Add Sail** button, to starting creating sails for the quote.
- Choose a sail type from the pop up menu and then click **Continue**.
- In the **Sail Pricing Form** enter your sail dimensions or area.
- Choose an area calculation type from the pop up menu.
- Now select the sail pricing options, such as fabric and construction type, to complete the sail.
- Click **Continue** when done.

Freight and other items

- Blank fields where you can enter text and a price.
- These are useful for freight and any extra charges that you wish to include in the quote.

Extra Items

- Choose from the pop up menus, extra text is added to the quote.
- These **Extra Items** let you quickly add text such as how long the quote is valid for and whether tax is included, to your quote.
- These can be customised using the Preferences.

Included Items

- Choose from the pop up menus.
- These **Included Items** let you quickly add text for items such as slides, hanks, battens etc. which you normally include in your standard prices.
- These can be customised using the Preferences.



Quote Printout

Print the Quote

- Click the **Print Quote** button.
- You are then displayed a preview of the printed quote. Click **Continue** to print.

Creating an Order - Follow these Step by Step Instructions



Orders

First Step, Create a new Order

- Click the **Order** button, this takes you to the **Order List**.
- From the **Mode** menu select **New Record**. This creates a new blank order record.
- Click the **Order Form** button. The **Order Form** gives detailed information about the order.



Order Form

Complete the sections of the Order Form

Choose a customer for the order, this can be done in three ways:



Choose an existing customer

OR

Choose an existing quote

- Use the same procedure as selecting a contact for a quote (see over page).

- Click the **Add Sail** button.
- From the **Sail Selection List** select a sail.
- By selecting a sail that is part of a quote then your order is automatically made out to that same customer.
- Click **Continue** to return to the **Order Form**.

Create a new customer record

OR

- Use the same procedure as creating a new contact for a quote (see over page).



Add sails to the order

- Now click the **Add Sail** button, to add sails to the order.
- After clicking **Add Sail** you are taken to the **Sail Selection List**.
- There are two ways of adding sails to your order:

Choose an existing sail

OR

Create a new sail record

- From the **Sail Selection List** select a sail.
- Click **Continue** once you've made a selection

- Click the **New Sail** button.

- Using either option you are then presented with the **Sail Selection Form** for that sail. The **Sail Selection Form** is very similar to the **Sail Pricing Form** used for quoting sails, but it has extra **Order** buttons. After making any changes to the sail options click **Order** to load the sail into the order.



- If you wish to make changes after adding sails to your order use the **Change Sail** button to alter any sails you have already added to the order and the **Delete Sail** button to remove a sail from the order.

Calculate the Total Order Price

- Fill in the order **Delivery Details** and any **General** notes.
- In the **Total Order Price** section enter a discount, add a freight cost and tax. These options are all optional. The total price is automatically calculated.
- Finally use the **Payment Terms** section to calculate a payment schedule.



Order Printout

Print the Order

- Click the **Print Order** button.
- You are then displayed a preview of the printed order. Click **Continue** to print.