

ESTIMATES AND OPEN JOBS

Estimates and Open Jobs work identically so we discuss them here together. Think of Estimates as the first step toward the goal of a Job. You get the job. Open Jobs is a developing record of actual costs for that estimated job. Each file holds reports put together in Worksheet. Each handles, in exactly the same way, specific information that often differs as the job progresses. Each has a window, called the Selector to look at records in the file.

Neither file lets you directly enter or revise data. That is done in the Worksheet and transferred to these files automatically when you post a report. That's the key. You must Post a report to have it appear in these files. Estimates are stored in the Estimates file, Confirmations and/or Open Jobs are stored in the Open Jobs file. Invoices wind up in the Receivables file, a file sufficiently different to have its own chapter.

SELECTOR

Both the Estimates file and the Open Jobs file open to a Selector window. The Selector window displays information generated in the WorkSheet file and transferred to the appropriate file when it is posted.

Estimate #	Date Issued	Expiration	Contact	Company	Reference	Phone	Amount
9916	6/30/99	*7/30/99	Lorrie Winters	Notchum, Needham & Shears	Executive Portraits	(607) 394-7358	\$4,809.74
9917	7/3/99	*8/2/99	Lela Dritchard			(212) 721-5235	

Job #	Job Date	Contact	Company	Reference	Phone	Amount	
9918	7/8/99						
9919	7/12/99	99081	Lorrie Winters	Notchum, Needham & Shears	Wilson Communications Corp	(607) 394-7358	\$5,326.50
9920	7/14/99	99082	Scott Antonopolis	Smith & Bryce Associates	MegaCorp Capabilities Brochure	(213) 724-0483	\$2,050.00
9952	7/14/99	99083	Kathleen Smith	Smith & Bryce Associates	MTI Corp Investments Brochure	(415) 724-0483	\$1,069.92
	8/13/99	96084	Carol Wilson	Hilton Hotels	Waikiki Hilton Brochure	(202) 523-1999	\$4,399.60
		99085	Roy Tolbert	Multi-Media Productions &	US West Yellow Pages CD	(817) 799-8360	\$5,663.26

In a list, the Selector shows the Estimate or Job number, its Date, Contact, Company, Reference, Phone number and the dollar total. The Estimates:Selector also shows an expiration, the final day a particular Estimate is valid. This expiration date is based on the date you entered in the Terms cell in Worksheet:Report Header window.

The Selector of each file is viewed on screen and can be printed.

The Phone icon is for dialing through a modem. Depress the mouse on the icon and a pop-up menu to see the dialing options. If you choose the word Dial... or the number immediately below that, you dial InView's best guess at the number. You can make dialing decisions yourself by selecting any of the three other options on the pop-up menu. Dialing Preferences in Flow Chart control this dialing just the same as dialing throughout InView.



QUICK VIEW

To view the details of any Estimate or Open Job, double-click on the report you want or choose Selector - Quick View from the Windows menu, Cmd/Ctrl-J. The Selector converts to the Quick View window that displays one Estimate or Open Job at a time. Every line of the report is displayed.

This window is just for looking at reports. Nothing can be modified. To modify a report it must be transferred back to the Worksheet file using Transfer to Worksheet in the Functions menu, Cmd/Ctrl-T.

To return to the Selector, double-click anywhere in the window or choose Selector - Quick View from the Windows menu.

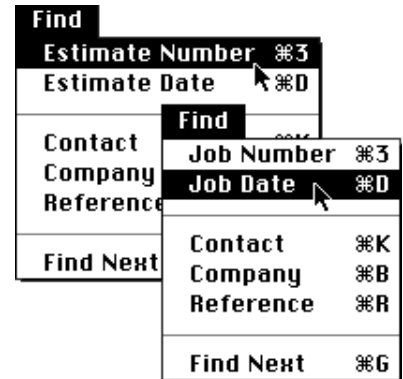
MENUS

FIND

The Find menu has a number of ways to locate reports in each file. Find does not isolate a report from the others. Find is like a good hound. It sniffs it out and shows it to you. The report is found and highlighted in the list.

- ESTIMATE NUMBER
- JOB NUMBER
- ESTIMATE DATE
- JOB DATE
- CONTACT
- COMPANY
- REFERENCE

Each of these opens a dialog box. Choose the one you want to Find in. When the dialog opens, type in what you want to find, press the Enter key and the scan of that field begins.



FIND NEXT

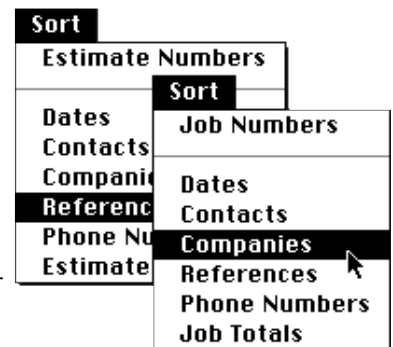
During a Find you may locate several instances of the same sorts of information and want to look at each one. Find Next resumes scanning, stopping at each recurrence until there are no more to be found. If you love your keyboard, Cmd/Ctrl-G is "Go Find some more." A beep indicates there are no more.

Note: Report number doesn't work, or it better not work, in a Find Next search. Each report number is unique so there is only one of each!

SORT

- ESTIMATE NUMBERS
- JOB NUMBERS
- DATES
- CONTACTS
- COMPANIES
- REFERENCES
- PHONE NUMBERS
- ESTIMATE TOTALS
- JOB TOTALS

The Sort menu orders the information in alphabetical, numerical or chronological order, as fits the data type you choose.



Functions

Look Up Contact

This opens the Contacts file and locates the record of the contact in the highlighted report in the Selector window. If there is no name in that report, a Search of the Contacts file begins to help you locate a contact.

Transfer to Worksheet

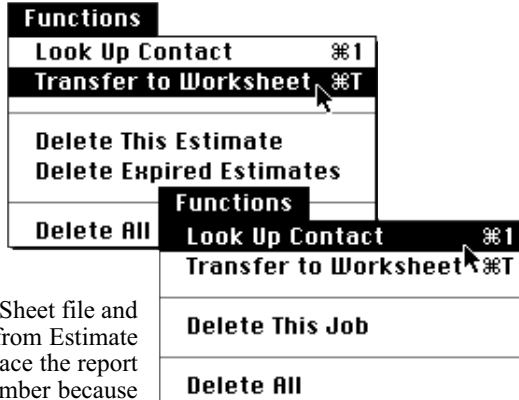
This transfers a copy of the highlighted report from the Selector window, or the report you are looking at in the Quick View window. The report goes to the Worksheet file for modifications. The report is not removed from Estimates or Open Jobs when the data is transferred to the WorkSheet file. Everything remains as-is in the Estimates or Open Jobs file record until you re-post the report. Re-posting replaces the report with a newly revised "report with the same number."

When you transfer a report from one of these files to the Worksheet, if there's already a report in Worksheet, you are asked if you want to replace the report already there with the one you are trying to transfer. If you posted the report in the WorkSheet file to its proper storage file, go right ahead and replace it.

Are you getting the idea that posting a report is critical? It's the only way the software can possibly keep track of it.

If you revise the report transferred to the WorkSheet file and Post it again without changing its Status, say from Estimate to Open Job, you are asked if you want to replace the report you left behind (remember, it has the same number because you transferred a copy of it). If you didn't make any changes to the report in Worksheet window, there's no reason to re-Post it. Click No. If you did make changes or added things, click OK to post the updated version which replaces the earlier version.

Tip ♦



Tip: Estimates and Jobs can also be moved to Worksheet by dragging the desired report from the Selector window to any visible Worksheet window.

Delete This Job

Delete This Estimate

Poof. This choice, or the Delete/Backspace key, eliminates the report that is highlighted in the Selector, but not before asking if you really mean it. You can retract the Delete command in the dialog.

Delete Expired Estimates

This works a little differently. A dialog asks you how many days past its expiration date an Estimate should be in order to delete it. The expiration date is the number of days an Estimate was valid. You installed that information in Terms in the Worksheet:Report Header window when you created the Estimate. Enter a number. All Estimates with an expiration date beyond the number of days you enter are deleted.

Delete All

The terminator. After confirming the choice, this completely clears the file. Nothing is left behind.

All of the delete choices have a safety. Until you Save the file, the deletions aren't permanent. It ain't over 'til it's over. If you change your mind and haven't Saved, use Revert To Saved in the File menu or close the file without saving. Phew!

WINDOWS

SELECTOR - QUICK VIEW

From either of the two windows you're viewing, this takes you to the other.

WORKSHEET

This opens Worksheet.

FLOW CHART

This opens the Flow Chart.

ABOUT ESTIMATES

ABOUT OPEN JOBS

The version, copyright and author information. Who did this, anyway?

