MBA Manual

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1 Introduction

1.1 Welcome to MBA Help

Although MBA was designed to be easy to use there is nothing like a comprehensive Help system when you need it. MBA has over fifty (50) Help Topics to get you up to speed as fast as possible. Many of the topics have links to others that are related to save you time in getting all the help you need. It is highly recomended that you spend a few minutes looking through the Help topics. Click on the **Contents** tab (left side of Help window)

We are always looking for ways to make MBA better. If you have any suggestions please email us.

1.2 Why MBA?

MBA was created to be extremely easy to use and with a price of $19.99, very affordable. Now all Sales Reps can take full advantage of their home PCs.

Save Time, reduce some tasks by over 90%

Both *Save Money* and *Make More Money* by being both effective and efficient

Concentrate on the important things like Customer service

Print professional looking Invoices, reports & labels

With MBA your business can be more fun than work

Just look at this list of features:

- **Automatically calculate Sales Orders including processing fee and Sales Tax**
- **Track customer information and their complete sales history**
- **Find a customers shade of lipstick from months ago in seconds**
- **Handle shortages and recalculate Sales Orders in a matter of seconds**
- **Print all Invoices (Customer sales receipts) for a whole campaign with a couple of mouse clicks**

- **Also prints individual Invoices one at a time, just select the Order from a list and press Print button**
- **Print a sorted list for a Campaign's Purchase Order in seconds, even estimate your earnings**
- **Print sorted Delivery Lists for efficient Order delivery route (with or without Brochure drops)**
- **Print Brochure labels with your Name, Phone number & Price expiry date**
- **Print Customer and Shipping labels**
- **Print Business Cards**

MBA is short for Marketing Business Assistant. Couldn't you use an "Assistant" in your business?

1.3 Help On Help

Use the **Contents** and **Search** in the panel to the left to navigate through the Help system. Most common topics are located together and many have links to similar topics. All of the regular windows in MBA have a Help button which will take you to the Help for that window. You can also reach the Help window by pressing the **F1 Key** on the upper left of your keyboard.

If you cannot find what you are looking for please visit our website at www.mbassistant.com/mba and click on the **Contact Us** in **Main Menu** to leave us a message or question. We also recommend you visit our **Forums** on the website as it is a great resource for answers to common questions.

TIP - Want to get up and running quickly with MBA? Try our new Quick Start

TIP - Spend a few minutes going through the Help file before you start to enter data. Click on the **Contents** tab in the panel on the left to see Help topics organized by type. Spending just a few minutes in the **Setup** topics will greatly enhance your understanding of MBA.

1.4 Quick Start

New to MBA? This Help topic will get you on the right course quickly. This help applies to both Demo mode and Registered mode. Quick Start just touches on the absolute minimum to get you up and running fast. Once up and running we urge you to spend a few extra minutes going through all the Help topics.

Spend just a few minutes getting ready and your experience with MBA will enhanced greatly.

TIP - This topic can be printed to make it easier for you to follow along. Use Print button a top of this window.

Question - Are my Product Brochures up to date (and how do I check)?

Answer - Click on **Product Brochure** button on toolbar. The Product Brochure window opens and has a series of tabs near the top of the window. Each tab has a Year - Campaign Number as a label. If leftmost tab is not the current campaign and you would like to start with the current campaign it (and any previous campaigns) can be Downloaded from our website (click on Downloads in top menu on website). Download the file directly into your MBA Folder (default C:\MBA). **New** from version 1.11 on. You can now Download new Brochure files directly from within MBA. See main menu File - Download Brochure... (there is also a Help topic on this new feature: Download Brochure)

Question - I downloaded the Campaigns but they don't display on the tabs of **Product Brochures** window?
Answer - You need to update the **Current Campaign** setting. To do this click on **Setup!** on the main menu. The Setup window will open with a series of color coded tabs. Click on Campaigns tab (bright yellow) and click the up arrow to the right of the Campaign number to increase it. While you are here double check the other fields **Campaigns per Year** and **Previous Campaigns** to make sure they are suitable for you. If you still don't see the new Brochure or it is blank check to make sure that you downloaded it into the MBA Folder (default C:\MBA)

Question - The City and State pull down lists are empty. How can I select these for my Customers.
Answer - Again the solution is in the **Setup!** window. To add Cities click on the City tab and use the New button to starting adding you local Cities. Once done with that you can select a default City that is inserted automatically each time you add a new Customer. The procedure applies to the State/Province tab.

Question - When I print address labels the State is blank?
Answer - For space reasons MBA uses the two letter State/Province Code. You may have added new States without the Code. Go to Setup! - State/Province tab and view the List on left to see if Code is missing. Select State in list and click Change to edit.

Question - How do I add Sales Orders when my Customer's order?
Answer - Click on the **Sales Orders** button on the toolbar. The Sales Orders list window opens, again with tabs just like the Products Brochures except there is an extra tab to show ALL orders (the tabs with a Campaign number only show orders from that Campaign). To add a new Sales Order click on the **New** button on the lower left of the window. Enter your Customers first and last name or click on the down arrow to select it from the list if previously entered. To add Products that are being purchased click on the **New** button (below the Number column in the widest list). The cursor moves to the first line in the Number column. Enter the products number (without the dash "**-**") and press the **Tab** key. If MBA finds the product in the available Brochures it fills in several of the other fields for you. Continue to press Tab key to move to the next field until you reach the end of the line. After each line is completed MBA will automatically recalculate the taxes and totals for you.

Question - I enter the Number for a Product that I know is $9.99 but MBA puts in the wrong price of $5.99 (the rest of the fields like Description and Shade are correct)?
Answer - MBA by default does lookups into previous Campaign to check for a lower price. If a lower price is found MBA uses the lower price. The defaults for this can be changed by modifying to fields. In Setup window on Campaign tab change the number in **Previous Campaigns:** (for example if you only allowed to go back one campaign make sure this a 1). The second setting that can be changed is on the **Sales Order** tab of Setup. **Product Selling Price & Order Price** on the lower left of the tab. The first option tell MBA to just use the Current Brochure. The second option tells MBA to select the lowest price from the allowable range of campaign available to you (using Previous Campaigns setting from above). The third option tells MBA to use the Current Campaigns Price but if the product was available

from previous allowable campaign to use the lower campaign on the Purchase Order. The forth option turns all lookups off.

Question - Is there a faster way of adding new products to a Sales Order without clicking on the New button?
Answer - Yes there a several to choose from: (1) press the Insert key (2) hold down the Alt key and press **N** key for New (3) when your enter the Product Number press the Down arrow key to fill in current row and move to next row.

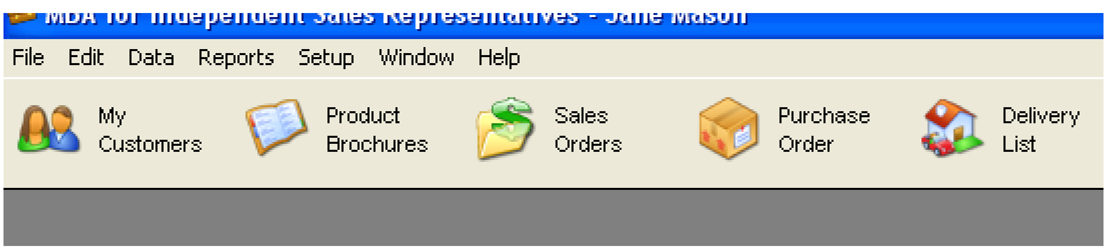
Question - The tax totals are wrong! How do I check/set the right tax rate percent?
Answer - Again the solution is the **Setup!** window. Click on the **Sales Tax** tab (Green) and change the Percent field.

Question - I don't want to use percent for a Customer discount can I just enter a dollar amount?
Answer - Yes if the dollar discount is for the whole Order just leave all the percent fields blank and enter the amount in the Discount field (bottom right of Sales Order). **New** from version 1.10 on, you can have both Percent Discount on each line plus a Fixed dollar discount for the whole Sales Order. See Setup! - Sales Order tab - Allow for Fixed Amount Discounts checkbox

Question - I don't want large single page Customer Orders is there a way to make them smaller?
Answer - Yes, MBA has an option to print smaller two per page Customer Invoices. Go to Setup! - Sales Order tab and select **Invoice Type** as Short (2 per page)

Question - This Quick Start has been helpful but I have a question that is not covered here.
Answer - The first and fastest option is to check through the Help topics. Second try looking in our online Forums on our website. Third visit the FAQs (Frequently Asked Questions) on the website Main Menu. Fourth send question to support@marketing-assistant.com

1.5 Main Menu and Toolbar



Main Menu

File

Print Setup... - Default Windows Printer dialog for you printer settings
Download Brochure - Download Brochure from MBA website Download Brochure
Create New Brochure - Create a new empty Brochure or Copy a existing brochure.
Import AV4 Brochure - Create a new MBA Brochure from a AV4 Brochure Import AV4 Brochure
Import AV4 Customer & Inventory - Import you Customer records & Inventory records into MBA from AV4 Importing AV4 Records

Export Sales - Create a CSV file named ExpSales.CSV (spreadsheets like Excel, OpenOffice, Lotus) of your Sales Order data for a Campaign
Export Email Adresses - Create a text file named email.txt for use in mass emailings (each line has separate Customer email address). Can be used with Email clients or Mass mail programs like Group Mail (free version avilable)
Backup - Create a Backup file of your MBA data
Restore - Restore your MBA data from a Backup file (see Backup above)
Exit - Quit MBA for Avon

Edit
Cut - Standard windows Cut to clipboard
Copy - Standard windows Copy to clipboard
Paste - Standard window Paste from clipboard

Data
Customer List - Customer List
Sales Order List - Sales Order List
Brochures - Borchures List
Create New Delivery List - Delivery List
View Delivery - Delivery List
Create Empty Delivery List - Delivery List

Reports
Customer Invoices for Campaign - Invoice Batch
Customer Address & Phone List - Customer Address
Customer Phone List - Customer Phone List
Customer History Report - Customer History Report
Product's Customers - Product's Customers
Products Purchase History - Product Purchase History
Helper - Helper Discount Report Helper Reports
Helper - Helper Collection Report Helper Reports
Labels ▶ Name, Phone & Expiry Date for Brochures - Brochure Labels
Labels ▶ Small Return Address - Mailing Labels
Labels ▶ Large Return Address - Mailing Labels
Labels ▶ Customer Address - Mailing labels
Labels ▶ Shipping Labels - Shipping Labels
Business Cards - Business Cards
Auto Trip Log Forms ▶ Portrait - Auto Trip Form
Auto Trip Log Forms ▶ Landscape - Auto Trip Form

Setup
Setup and program defaults (it's all controlled here) - Setup General Info

Window
Tile - Standard windows Tile all windows
Cascade - Standard windows Cascade all windows
Arrange Icons - Arrange minimized windows

Help
Contents - Help Index
Search for Help On... - MBA Help windows, on the Search Tab...
How To Use Help - Standard windows help file
About... - Version and copyright notice.

Toolbar

My Customers - Customer List

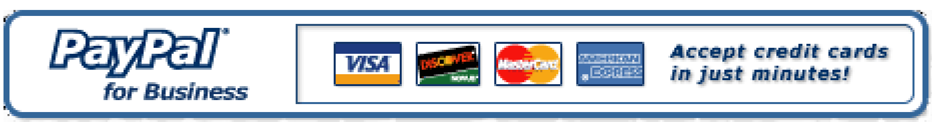
Product Brochures - Brochure List

Sales Orders - Sales Order List

Purchase Order (Print) - Purchase Order

Delivery List - Delivery List

1.6 How to Buy MBA



Introductory price just **$19.99**
Order from our website using PayPal (PayPal account not required)

Our Homepage
www.mbassistant.com/mba

1.7 Importing AV4 Records

This utility program was created to help MBA customers save time moving from AV4 to MBA. The only goal is to help reduce the amount of data entry needed in switching products.

This program requires that the ODBC driver for Access be installed on your PC (it is not included with this utility). If you are running Windows XP or have Microsoft Office installed you probably have ODBC for Microsft Access Database. (see notes below for Info on how to check if ODBC for Access is installed/available)

There is two areas that are covered with Import:
1. - Importing Customer names and addresses.
2. - Importing Inventory data.

To start the Importing process click go to Main Menu **File** - **Import** then **Import AV4 Customer & Inventory**

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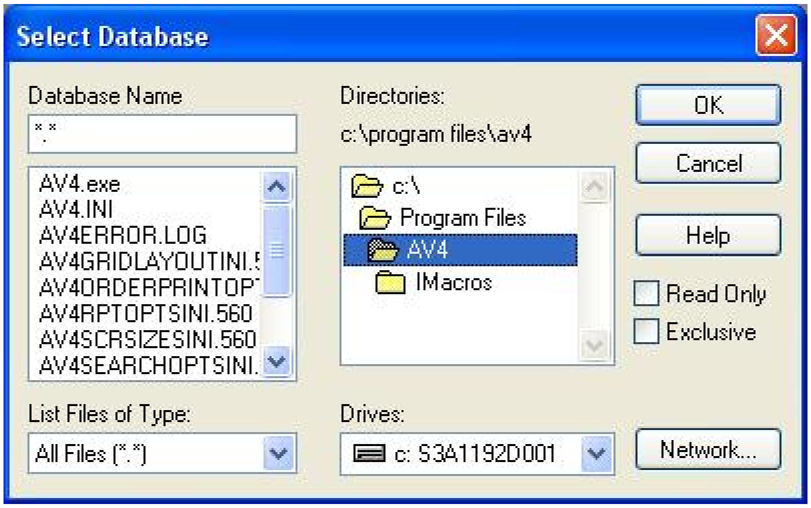
Customers - Check this box if you would like to import Customer names, address & telephone numbers. The three phone number types are the labels for AV4 Phone 1, Phone 2 & Phone 3 fields from customer record (recommended but not required).

Inventory - Check box if you would like to import the Product number, description and On Hand Quantity inot your MBA Inventory Shelf.

As stated above the goal of this utility is to simply import this data and save you some time with data entry. No Sales Order or history data is imported. Also please check that the version number so that this utility and MBA are the same (see main menu Help - About...)

Select AV4 Database - (default install is C:\Program Files\AV4) Please note the *.* in "List Files of Type:" and "Database Name" fields as it defaults to *.MDB, this extension has been renamed AV4DB by the makers of AV4. Select the database (normally CustomerOrderDB.AV4DB) in the files list and click OK button. Also older versions of Av4 may still have the .MDB extension.



Note the *.* (List Files of Type) in screen shot above.

ODBC Notes (directions to see if ODBC for Access is installed/enabled on your PC)

- To open Data Sources (ODBC), click **Start**, and then click **Control Panel**. Double-click **Administrative Tools**, and then double-click **Data Sources (ODBC)**.
- For information about using Data Sources (ODBC), in the **ODBC Data Source Administrator** dialog box, click **Help**.

1.8 Import AV4 Brochure


Import a AV4 Brochure and convert it to a MBA Brochure. An Avon by the name of Holly creates the databases (brochures) for use with AV4. This procedure allows you to convert these for use with MBA. Several MBA Reps use to use the AV4 program and purchased Brochures from Holly. They wanted to continue using them so this Procedure was created to allow them to be imported/converted for MBA. Also Holly has Trendsetter Brochures which are available earlier than the standard free MBA Brochures so any Trendsetter that prefer to use MBA can now buy the databases from Holly.

You must extract the database file from the ZIP file before converting/importing.

Holly's website is at www.avonwithholly.com and the currrent prices are listed on the site.

Please Note: This import/convert Procedure requires that you have the ODBC driver for MS Access installed on your computer so that MBA can read the database files. There is a database file available from the MBA Downloads area you can use to test with before buying the files (please take the time to test before buying as this has not been tested with every version and configuration of the ODBC driver and not guranteed to work for everyone). This procedure even works in Demo Mode so if you are a Trendsetter thinking of purchaseing MBA please try importing with the Test file before buying.

1.9 Export Sales

Export Sales Order data for a range of Campaigns. The data is exported to a CSV (Comma Separated Values) file that can be use by common spreadsheet programs like MS Excel and

OpenOffice Calc. The data is saved to a file named ExpSales.CSV

1.10 Submit Order to Avon

The Submit Browser is to assist you in Uploading the Purchase Order data (as seen in the PO Report) to the Avon website. The MBA Browser is a custom version of the normal IE browser and requires that IE 5.5 or later is installed (it just has to be installed, it does not have to be your default browser). The purpose of the MBA Submit Browser is to help you fill out the default Order forms on the Avon website (saves you from a lot of typing).

Please Note: Before you use this feature in MBA make sure you have entered the correct information in Setup (on Upload tab). Once activated in Setup you will be given a choice when running the Purchase Order to run a Report or to Upload.

The process is almost the same as when you fill out the website forms manually. You go to the specific page but instead of typing in the data you make sure the Page Type (Order/Exchange/Refund) is correctly selected then you click on the Submit button. MBA will automatically fill in the Form fields for you, check to make sure all the data is correct and then save as normal. The Page number will increment automatically and you will be able to Submit the next page. Repeat this process for as many pages as you need to Submit. Next switch to the next type of Form if needed (Returns/Credits, Exchanges, etc.) and repeat the same process.

Browser Tab
Address: The Avon website address, for example www.ca.avon.com (defaults to address entered in Setup)
Type: The entry From Type (Order form, Refund form, Exchange form, etc.) this will vary from country to country.
Page: The number of the next page of data to be Submited.
Submit: Click on this button to have MBA fill in the Form. Submits one page/form full at a time.
Help: Calls this Help page.

It is recommended that you print a copy of the Purchase Order report so you have a means to check the data being uploaded.

See Also:
Upload (Setup defaults and activation)
Purchase Order Report

1.11 Setup

See Setup General Info. Also each tab on the Setup window has it's own Help topic.

1.11.1 Setup General Info

MBA like most modern software has numerous settings so you can configure it to best suite your needs. We have tried to group all similar settings and defaults onto a single Tab on the Setup window. Below is a list of the Tabs and the types of settings and defaults contained in each.

Your Info - Your name, address, phone number, email, website and MBA registration information.

Sales Tax - Up to 2 Sales Taxes, Tax Name and rate.

Processing - Processing Charge amount

Passwords - Password protect program (optional)

City - List of Cities used in Customer address, just type them once. Default for quicker data entry.

State/Province - List of States for Customer addresss, just type them once. Default for quicker data entry.

Telephone Types - List of phone types (Home, Work, Cell, etc.) Just type it once then pick from list or autofills when you start typing.

Payment Types - List of accepted payment types (Cash, Check, etc.) Just type it in once.

Campaign - Current Campaign number, number of Campaigns you can go back for ordering.

Sales Order - Customize Customer Invoice data, default message, auto numbering of Invoices

Category - Product category names (Regular Avon Product, Health & Wellness, etc.)

Return Codes - List of Return Codes and their descriptions for product returns.

Accounting - Sub-Accounts for Profit & Loss Worksheet

Territory - Sort order for Delivery lists

1.11.2 Your Info

Your Personal Information (Name, Phone number, Address). Many of the fields like Name and phone number are used on reports and business cards. At the bottom is Registration Information for entering Code and Keys that are sent to you after registering on our website. The program runs in Demo Mode without the Code/Key and you are limited to 10 customer records and 10 transaction records (once the appropriate Code and Key are entered the restriction is lifted)

Display Popup Help - Turn Tooltips/Ballon help on or off.

1.11.3 Sales Tax

Sales Tax setup allows you to define the number of Sales Taxes and the names, codes, rate.

Sales Taxes - Choose one or two.

Sales Tax 1
Name - the tax name (ie GST, HST, PST, VAT, etc.)
Code - a single letter code to display on screen and printed invoice (ie. G for GST, P for PST, etc.)

Percent - the tax rates percent, entered as a whole number (ie. 7.500 for "seven and one half percent", 7.5%, NOT .075)
Number - Number issued to you by tax authority (optional)

Sales Tax 2 - Same as Tax1, leave blank if not used/needed.

Calculate Sales Tax Automatically - have the program calculate taxes for you.

Charge Tax 1 On - 4 options (Cost is after discounts, Retail is brochure price, Cost + Processing same as Cost but charge tax on Processing Charge, Retail + Processing charge tax on Retail price and on Processing Charge)

Charge Sales Tax on Shipping - Toggle Sales Tax on Sales Orders Shipping field.

1.11.4 Processing

The amount for Processing Charge on customers orders. If the checkbox for Processing Charge on the Customer record is check, this amount will be automatically entered in the Processing Charge field of the each new Sales Order.

1.11.5 Password

You can optionally password protect MBA so that a user must enter a password before they can use the program.
Note - passwords are optional and the default is no password. If you forget the password you will not be able to continue using MBA. The **Confirm** field is for you to type in the exact same password again to confirm it is correct before saving.

1.11.6 City

A list of Cities used in Customer address. Once a city name is entered you can pick it form a pulldown list so you don't have to keep typing it over and over again. MBA also has an autofill feature on Customer City field so that when you start typing in the City name it will automatically start filling in the rest of the name for you. There is also a default field which allows you to have a default that is automatically added to every new Customer record. This is handy as many of your customers will be in the same City so you will save time.

1.11.7 State/Province

A list of States/Provinces used in Customer address. Once a State/Province name is entered you can pick it form a pulldown list so you don't have to keep typing it over and over again. MBA also has an autofill feature on Customer State/Province field so that when you start typing in the State/Province name it will automatically start filling in the rest of the name for you. There is also a default field which allows you to have a default that is automatically added to every new Customer record. This is handy as most of your customers will eb in the same State/Province so you will save time

1.11.8 Telephone Types

 List of Telephone types used on customer record (ie: Home, Work, Cell, etc.) Save time from typing these over and over.

1.11.9 Payment Types

 List of Payment types you accept from Customers when paying for their Orders.

1.11.10 Campaign

 Campaign defaults.

Current Campaign - Default for many data entry fields and report options.

Campaign per Year - The last campaign of you year. Used to inform program when to rollover the Campaign number when clicking on the default Campaign spin control.

Previous Campaigns - The number of campaigns you are allowed to go back when ordering product.

1.11.11 Sales Orders

 Defaults for Sales Order screens and Customer Invoice printout.

Automatically Number - check to have MBA automatically number Sales Order

Next Number - the next number to use if Automatically number is checked

Customer Invoice Message - prints on bottom left of Full page Customer Invoice or centered on Short (2 per page) Invoice.

Retail Price - Use current brochure price or search previous campaign(s) for a Lower Price. The number of campaigns that MBA looks back is controlled by the setting of **Previous Campaigns** on the **Campaign** Setup Tab

Default Sales Tax - The default for taxes (check = charge tax) when entering new items on the Sales Order

Invoice Type - Select between Full Page and Short (2 per page). Because MBA reports are previewed first you can try both of these options to see whcih you like best without wasting paper and ink.

Color the Invoice Line - Check this box if you would like shorts (Backorders/Unavailable) to print in Red to be more visible on your printed Customer Invoices.

Allow for Fixed Amount Discounts - Display a second entry field for Fixed Dollar Discounts. You can have both percent discounts (from each Line Item) and a Fixed Dollar amount to combine for a total discount for the Customer.

Include Previous Balance on Total - Check this to have MBA automatically include any previous unpaid amounts and add them into the Total

Print Rep's Address on Full Page Invoice - Check this to have you address printed on Single Page Invoice under Telephone numbers. This will increase the height of the Invoiced header area.

Shipping Prompt - Allows you to rename the Shipping field and use it for other purposes (maximum 10 letters).

Center Message - The Message that prints on the full page Customer Invoice is Left justified by default, check this box to center the message inside the Notes box.

1.11.12 Category

A list of Product Categories for Products and Demos. Every product belongs to a specfic category. The Category defines the discount type as Variable, Fixed or No Discount. Also if it counts toward your Variable discount. If the discount is Fixed the fixed percent is recorded in the Categories record.

Variable Discounts List - A list of amount ranges and the discount percent that applies to the range.

1.11.13 Return Codes

A list of Return Codes used when sending product back for Returns or Exchanges. These are used on the Purchase Order report.

1.11.14 Accounting

A list of Sub-Accounts used when filling out the Profit & Loss worksheet. These accounts allow you to group similar transactions.

1.11.15 Territory

List of Delivery territories. One of the options for creating a Delivery List is to order the list by Territory. Territories allow you to group deliveries into logical geographic areas like neighborhoods. Each customer record has a territory field so every Customer can be assigned a territory. When you create a Delivery list by Territory all the Customer deliveries will be grouped together by neighborhood. For example: City North, City South, City East, City West. If you don't like the sort order by name you can prefix Territory names with numbers (ie: 01-City West, 02-City South, 03-City North).

1.11.16 Points

The Points tab allows you to create up to nine Customer Points programs. Each program has a message that prints on the bottom of the Customer Invoice (2 per page type only). Enter a 5 digit place holder in the message for the points by placing five # signs in a row (ie: You have earned ##### points.). The points are brought in from the Customers points (Points tab on Customer record).

See Also:
Customer Form

1.11.17 Upload

Uploading Purchase Order data to Canadian Avon website (www.ca.avon.com). This is an extension to the Purchase Order Report. If Uploading is turned on you will be asked after selecting Purchase Order if you want to Upload or run Report. If you select Upload MBA will open its built in Web Browser and attempt to open Avon web page. The Browser has 4 tabs: Browser, Product Order, Refund & Exchange. The Browser contains the web page window and some basic control buttons. Product Order contains a list of items to be ordered. If you want to stop an item from being included uncheck the Submit (S - column).
Refunds contains a list of items for Refund. Exchange contains a list of items for Exchange.

The concept of the Upload Browser is very simple, you go to the website like normal but instead of typing in all of your Products to be submited MBA does all the typing for you one page full at a time (you just click on the Submit button). Next to the browser Address field is the Type selector. You set this for each of the 3 types of submiting you choose to do. For example go to Refunds section of Website as normal, set Type to Refund (the page will be reset to 1), click the Submit button to upload the first page of Refund items, check to make sure everything is ok and then click the websites Save button just as you would had you entered the items by hand. MBA will automatically increment the page number for you. Repeat this process for as many pages of items you have.

Upload Purchases to Avon.com - check if you would like to use Uploading and have MBA ask each time you do a PO

Avon URL - the website address you use for Avon site.

Rows per Order Page - the number of rows the Order webpage has.

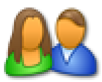
Rows per Refund Page - the number of rows the Refund webpage has.

Rows per Exchange Page - the number of rows the Exchange page has.

Please Note: The built in browser uses DLLs (Dynamic Link Libraries) from IE (MS Internet Explorer) so you must have IE version 5.5 or 6.0 installed on your PC (IE does not have to be your default browser, for example you could have FireFox installed as your default browser you just need the 5.5 (or above) DLL installed).

2 Customers

2.1 Customer List



A sortable and searchable list of all your Customers. The list can be sorted (both ascending & decending) by clicking on the column name. For example if you click on **Last** the list will be sorted on last name in ascending order (A - Z). If you click Last again the list will resorted in descending order (Z - A). The **Search** field allows you to find records by searching on the selected (sort order) column. For example if the list was sorted on **Last** (as in our example above) and you entered **Smith** and pressed the **Tab** key, the selection bar would go to the first customer record with the last name of Smith.

New - Add a new customer record.
Change - Edit the selected customer record.
Delete - Delete the selected customer record. Please note, you can only delete customers with no Orders.

Help - Brings you here
Close - Close and exit Customer List window

See also:
Customer Form

2.2 Customer Form

The Customer Form is where you enter your Customer's information. Each record holds the Customer's name, address, telephone numbers, email address, personal information/dates, notes and Sales Order history. The Customer Form also displays Sales totals and Balances owing. Orders history lists use standard Sorting to help with locating information.

Title - Select from Mrs., Ms. Miss, Mr. or Dr.
First - Given name
Last - Family/Surname

OK - Save
Cancel - Exit without saving
Help - This Help topic

Address & Telephone Tab

Address Line 1 - First line of Customer's address
Address Line 2 - Addition line if needed
City - City name, new names can be added, autofill when typing. Default may be set in Setup -

City
State/Province - State/Province name, new names can be added, autofill when typing. Default may be set in Setup - State/Province
Country - Name of country. Default may be set in State/Province
Postal/ZIP Code - Up to 10 digits, numbers & uppercase letters.
Territory - Used for delivery purposes, Delivery List can be sorted on this field. You can enter numbers, neighborhood names or both to sort you deliveries in logical groups or routes. See Territory
Map - If you are connected to the Internet this button allows you to search the MapQuest website for a street map to this customers address (shows star on map to indicate location). Mapquest maps can also be printed.
Email - Customers email address. If filled you may click the button to the right to automatically run your default Email client software (Outlook, Thunderbird, Eudora, etc.)
Brochures - The number of brochure to deliver to customer each campaign.
Phones - Add as many phone numbers as you like for each customer (New, Change & Delete buttons below list)

Personal & Family Tab

Birthday - Customer's birthday (used in Upcoming Birthdays and Anniversaries report)
Anniversary - Customer's anniversary (used in Upcoming Birthdays and Anniversaries report)

Spouse - Souses name
Interests - Hobbies, Interests, Sports, etc.

Notes Tab

Notes text box - Large free form text box to enter additional data.

Sales Orders Tab

Sales Orders List - List of Sales Orders for this customer
Total - Sum of Balance Owing field
Sales Items List - Line items from the Sales Order selected above.

Products Purchased Tab

Products List - Sortable list of all Product purchases on file for this customer. Very handy for locating shade/size information on previous purchases.

Helper Tab

This tab only displays when the Helper checkbox is checked. Enter the Helper's Customers on the list on the left. You can also enter the Helper's name to this list if you want their purchases to count toward the discount. The list on the right allows you to enter sales ranges (starting & ending) and a discount percentage for sales totals in this range (similar to what Avon does with Reps). Also see Helper Reports under main menu Reports.

Points Tab

9 Points fields to hold Customer points for each points program you run. Please note that these points fields must be maually updated.

Brochures Tab

List of Catalogs delivered to this Customer. You can enter these manually or have MBA do it for you after Printing/Viewing the Delivery List

Note - It is a good idea to setup a Customer Record under your name for entering and tracking Personal Purchases, Demo and Sales Aides. These items can be marked by Transaction Type (the "T" column in Sales Orders) so they can be tracked and calculated.

2.3 Customer Phone

Telephone numbers for this customer. You may have an unlimited number of phone numbers for each customer.

Type - Select or add new phone type (Home, Work, Cell, etc.)
Number - Telephone number. Free format so they can be entered a number of ways. 555-1212, 555-555-1212, (604) 555-1212 as well as European formats. Maximum length is 20 characters.
Note - Additional info

See also:
Customer Form
Setup Telephone Types

3 Brochures

3.1 Brochure List

A sortable and searchable list of a range of Campaign Brochures (the Current Campaign and one or more previous). The list can be sorted (both ascending & decending) by clicking on the column name. For example if you click on **Description** the list will be sorted on product description in ascending order (A - Z). If you click Description again the list will resorted in descending order (Z - A). The **Search** field allows you to find records by searching on the selected (sort order) column. For example if the list was sorted on **Description** (as in our example above) and you entered **Bath** and pressed the **Tab** key, the selection bar would go to the first Brochure record with the Description of Bath.

New - Add a new Product record.
Change - Edit the selected Product record.
Delete - Delete the selected Product record.

Help - Brings you here
Close - Close and exit Brochure List window

See also:
Brochure Form
Create New Brochure
Download Brochure

3.2 Brochure Form

Add or Change products in the Brochure.

Number - Product number

Desription - Product description

Shade - Product shade/color

Size - Product size

Price - Selling price

Page - Page number

See Also:
Brochure List
Download Brochure

3.3 Create New Brochure

Although Brochures for each campaign are available for download from the MBA website there may be times where you want to create your own.

For Campaign - Select the new Campaign number

Type to Create - Select between *Create Empty Brochure* and *Copy Current Borchure*. If Copy is selected you can choose via the checkboxes below it to *Clear the Prices* and *Clear the Page Numbers*

See also:
Download Brochure

3.4 Download Brochure

Download a Brochure directly from the MBA website without using your Web Browser. The Brochure file is downloaded directly into the MBA Folder. Please note that you will still have to increment your Current Campaign in Setup for this new Brochure to be available in MBA. You must be connected to the internet for this Procedure to work.

Please Note: Brochures on the MBA website are provided for free and have no warranty/guarantee of accuracy. They are provided for the purpose of reducing the amount of typing required when creating Sales Orders. Please check all data for accuracy.

4 Sales Orders

4.1 Sales Order List

A sortable and searchable list of a range of Sales Orders (the Current Campaign and one or more previous or All with All Tab). The list can be sorted (both ascending & decending) by clicking on the column name. For example if you click on **Last** the list will be sorted on Customer Last name in ascending order (A - Z). If you click Las again the list will resorted in descending order (Z - A). The **Search** field allows you to find records by searching on the selected (sort order) column. For example if the list was sorted on **Last** (as in our example above) and you entered **Smith** and pressed the **Tab** key, the selection bar would go to the first Sales Order record with the description of Smith.

New - Add a new Sales Order record.
Change - Edit the selected Sales Order record.
Delete - Delete the selected Sales Order record.

Shortage - Adjust Sales Orders for Shortages (Backorders, Substitutions, Unavailable)
Shortages
Print Campaign - Print all Customer Invoices in a batch (Invoice Batch)
Print - Print Customer Invoice for the selected Sales Order

Help - Brings you here
Close - Close and exit Customer List window

See also:
Sales Order Form
Sales Order Line Item
Sales Order Payments
Shortages
Invoice Batch

4.2 Sales Order Form

Sales Order Form is arranged into 4 areas. The 1st (top) has basic information about the Order (Customer, Date, Campaign, Order Number, Notes). The 2nd (middle) has all the orders line items (products, Qty, Price, etc.). The 3rd (lower left) has the Payments & Message. Finally, 4th (lower right) has the amounts and Totals.

Customer - Select Customer name from list. You can start typing the Customer's First name and MBA will automatically start filling in the field.
Campaign - Defaults to the Current Campaign number, use the arrows if you want to adjust.
Date - Order date, defaults to date Order created
Order Number - Order number, you can enter your self or have it set automatically (see **Setup** - Sales Order)
Notes - Additional information about this Order. Does NOT print on Customer Invoive

Line Items List (Sales Order Line Item)
New - Add a new line item to order

Change - Edit the selected line item
Delete - Delete the selected line item

Payments List (Sales Order Payments)
New - Add a new payment
Change - Edit the selected payment
Delete - Delete the selected payment

Message - This multi-line message prints on the bottom of the Customer Invoice. This message is specific to this one Order so you can personalize it as appropriate. The default message (if you choose to have one) is set in **Setup** - Sales Order

Save & Close - Save your changes and close Sales Order window
Cancel - Cancel changes and exit
Help - This Help topic

See also:
Setup - Sales Order
Sales Order Line Item
Sales Order Payments

4.3 Sales Order Line Item


Each Product you add to the Sales Order has a number of properties/options that are entered on this window. When the Sales Order Line Item window is closed the changes are displayed in the Line items list of the Sales Order.

Number - Product Number, if you click the button to the right you can select the product from a list.
Brochure - The brochure number, defaults to the current Campaign.
Status - Display status of item (Backorder, Unavailable, Substitue, Previous backorder), blank if regular sale.
Category - Select which category the product is from (default is Regular Avon products). This is used to calculate your Estimated Variable Discount, Estimated Total discounts and Estimated Earnings.
Transaction - Select between the five types Sale, Return, Exchange, Personal & Inventory (default is S for Sale). If you select Return, the Return Information window will be open. If you select Exchange the Exchange Information window will open (see below) . Personal marks the item as used for peronal use and can be Totaled on the Sales Summary report to help with your accounting. Inventory marks the item as for Inventory purpose, menu **Data - Inventory - Add from Campaign** will add all these items to your Inventory for you (saves you some typing).
Page - The page number of the brochure
Description - The product description/name
Order Qty - The number of units being ordered
Price Qty - The number of units being charged for. This is usually the same as Order Qty above but a method is needed to handle specials like **2 For** and **3 For**. For specials the Price Qty is for number you are charging for (Example: with a 2 for $5 special you would enter 2 in Order Qty, 1 in Price Qty and 5.00 in price. The customer is shipped 2 products the the 1 price of $5) If you leave the Price Qty blank/zero MBA will automatically fill it will the same amount as the Order Qty. If you are giving a product away for free you will have to make the Price field zero (0.00).
Price - The selling price

Sales Tax - Check for applicable taxes (defaults Setup - Sales Order)
Discount - Enter discount amount as a percent (10.00 is 10%). The discount is NOT included in extended total but displays in Discount field at bottom right of window.

Tip: After entering the Product Number (first column) press the down arrow key to jump to next item. MBA automatically will fill in the Description and Price and calculate the Extended total.

If **Transaction** is not Sale (normal), one of the two Windows will popup.

Return Information
Product is being Returned - Check if sending item back
Reason Code - Select reason code from list

Exchange Information
Product is being Returned - Check if sending item back
Reason Code - Select Reason Code from list
Number - New products number
Description - New products description

4.4 Sales Order Payments

Each Sales Order may have one or more payments associates with it. Payments can be entered before (as in a deposit or prepayment), on delivery or after delivery. Total payments for each Order are displayed under the Sales Order Total (lower right).

Payment Type - Select payment type from list (**Setup** - Payment Types)
Date - Date payment entered
Amount - Payment amount
Note - Additional info

OK - Save changes
Cancel - Exit without saving changes
Help - This Help Topic

See also:
Sales Order Form
Payment Types

4.5 Shortages

One of the best features of MBA is how fast and simple it makes the handling of product shortages ("shorts" as they are NOT so lovingly called). In the normal "pen & paper" system you either put off calculating you Sales Orders until you are sure the product has arrived or you scratch out the "shorts" and manually recalculate the Sales Order. This very time consuming task it handled quickly and easily in MBA. Once you have confirmed the "shorts" you simply click on the Shortage button once for each item shorted. When the window opens select the Campaign (defaults to previous) and enter the Product Number of the item. Select the "Type" of short **Currently Not Available**, **No Longer Available** or **Substitute** and add any additional info and click the Start button. MBA will mark each item in every Sales Order for that campaign and recalculate the Order, including Sales Taxes. If the item is Backordered (Currently Not Available) MBA will create a Sales Order for it in the Campaign of your choosing so you won't forget about it (this item will NOT be included in future Puchase Orders as it is marked as a Backorder).

5 Delivery List

5.1 Delivery Menu

 The purpose of a Delivery List is to help you organize an efficient route for delivery of Customer Orders and new Brochures. You also have the ability to insert other tasks into this list (for example, stop at bank or office supply store) to further maximize your time. If you click the Delivery List button on the Toolbar of the Main window you will get the Delivery menu directly below the button. You are presented with three choice of **Create New List**, **View List** and **Create Empty List**.

Create New List **-** Create a new delivery list based on the current campaign. This new List will overwrite any previous List you have created before (there is only one Delivery List at a time)
Delivery List Options
View List - Load and display the current Delivery List
Create Empty List - Create a new empty list (overwiting any previous list)

See also:
Delivery List
Delivery List Form
Delivery List Options

5.2 Delivery List Options

 When creating a Delivery List you have multiple options of what is to included in your list.

Campaign - Select the Campaign that the list is for.

Order List By **-** Select the initial sort order that the list will be created in. Select from Territory, customer First Name, customer Last name and ZIP/Postal Code.

Delivery Type Options - In addition to the sort order you need to select which data will be used to build the list. Orders Only adds just Sales Order deliveries to the list. Orders & Brochures adds Sales Orders and all Customers without Orders but Brochures greater than zero in the Brochures field on their Customer record. Brochures Only (All) adds all Customers with their Brochures field on their customer record greater than zero (with or without Orders). Lastly, Brochures Only adds Customer with Brochures field greater than zero and with NO Orders in the selected Campaign (this allows you to Deliver all Sales Orders first, then create a new list with Brochure deliveries only fro the selected Campaign)

See also:
Territory

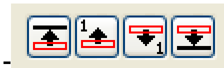
5.3 Delivery List

 List of Delivery Drops for Sales Orders, Brochures and other errands.

New - Add a new Delivery/Stop

Change - Edit the selected Delivery/Stop

Delete - Delete the selected Delivery/Stop

Shuffle/sort buttons -  move Delivery record to Top, Up one, Down one & to Bottom

Print - Print the Delivery List

Help - this Help topic

Close - Close delivery window

See also:
Delivery List Form

5.4 Delivery List Form

The Delivery Form allows you enter new Deliveries/Stops or edit existing records.

Brochures - The number of Brochures to deliver

Line 1 - First line, name

Line 2 - Second line, start of address

Line 3 - Third line, rest of address

Line 4 - Additional info

Balance - Balance due

See also:
Delivery List
Territory

6 Accounting

6.1 Accounting List

List of **Profit & Lost** Worksheets for each campaign. For each Campaign track your Income and Expenses for both Business Management purposes and Income Tax purposes. The worksheet totals can be printed with the Profit & Loss report.

Note - It is a good idea to setup a Customer Record under your name for entering and tracking Personal Purchases, Demo and Sales Aides. These items can be marked by Transaction Type (the "T" column in Sales Orders) so they can be tracked and calculated.

See also:
Accounting Worksheet
Profit & Loss
Setup Accounting
Sales Summary Report

6.2 Accounting Worksheet

It is important that you keep business records for Income Tax purposes. As a Independent Contractor you are eligable to deduct expenses incured in your marketing business and it is important that you keep records of income and expenses.

The Accounting Worksheet is modeled after the one issued by Avon Canada with the exception that the Totals calculations are done automatically for you. The Worksheet is divided into three groups, 1. Gross Profit, 2. Expenses, 3. Total Profit/(Loss).
Each of the Groups has worksheet accounts (each starts with a letter) that are the total of all entries of that type. To make entries for each of the accounts click the button to the right (Totals are calculated automatically and have no button). The Transactions for each account are just for the selected Campaign. Some accounts will have only one or two entries per Campaign while others will have many.

GROSS PROFIT
A: Sales to Customers - is the total of all Customer Invoices for the campaign including previous shorts.

B: Customers Served - This is your share of the Processing Charges (usually 50% of total Processing Charges).

C: Discretionary Price Discounts - The total of all discounts you give Customers (deduct from the regular selling price)

D: Credits Received - The total retail (borchure) price of credits received from Avon for any products returned in a campaign

E: Net Sales of Product - The total of A + B - C - D. This is calculated for you by the program.

F: Sales Leader Earnings - this is for Sales Leaders only and the amount is copied from your

Earnings Statement

G: Net Revenues - Total of E + F. This calculated for you by the program.

H: Cost of Goods Sold - Total sales to Customers minus the total of your discounts. For example $200 in total sales less your 30% discount would give a Cost of Goods of $140.00

I: Cost of Credits Received - The retail price (in Line D) less your discount.

J: Personal Purchases - The total of your purchases at cost price (Brochure price less your discount)

K: Net Cost of Goods Sold - Line H - I - J. This is calculated for you by the program

L: TOTAL GROSS PROFIT - Line G - K This is calculated for you by the program

EXPENSES
M: Demo, Sales Aides and Business Boutique Items Expenses - Samples, Brochures, Delivery Bags, Business Cards, Business stationary.

N: Promotion and Travel Expenses - Advertising, Customer entertainment, Gifts for promotion. Travel Expenses for business trips.

O: Selling Expenses - Postage and courier charges, photocopies, long distance phone charges.

P: Office Administration Expenses - Accounting service fees, bank charges, office supplies, sign-up fees

Q: Automobile Expenses - All related auto expenses. Fuel, Insurance, lease payments, repairs & maintenance. Parking fees and tolls. The business portion of these is calculated as a pecentage of mileage traveled for business puposes. In the USA you may also calculate auto expenses as a per mile rate.

R: Home Office Expense - Rent, mortgage interest, heat, light, insurance, property taxes, repairs & maintenance.

S: Shipping and Handling Fee - as per your statement from Avon

T: TOTAL BUSINESS EXPENSES - Total of Lines M to S. This is calculated for you by the program.

See also:
Setup Accounting
Sales Summary Report

6.3 Accounting Income List


List of Income transactions for the current Income Line on this Worksheet. The total at

the bottom is the total that will display for the Line on the Worksheet.

6.4 Accounting Income

 Income window for the current transaction.

Date - The date of the transaction

Source - Statement or Check number

Description - Description of the Income

Note - Additional info

Amount - Income amount

6.5 Accounting Expense List

 List of Expense transactions for this Worksheet Line. Record additional detail about the transaction.

New - Add a new expense transaction

Change - Edit the selected expense transaction

Delete - Delete the selected expense transactions.

See also:
Accounting Expense

6.6 Accounting Expense

 Enter expenses for this Expense Line of the Worksheet. Record additional details for improved record keeping.

Sub-Account - Group expenses by type

Vendor - Name of supplier

Date - Date of expense

Source - Invoice number or check number for tracking purposes

Paid By - Type of payment (Cash, Check, Visa, etc.)

Description - Description of Product/Service purchased

Factor - Some expenses are only partially deductable for business purposes (ie: only business use part of a car expense). For these expenses you can check this box and enter the amount in **Paid** and the percentage that applies. MBA will enter the allowable portion in the Amount field.

Paid - The original amount paid.

Percent - The allowable portion as a percent (for 50% enter 50.00)

Note - Additional info

Amount - The expense amount.

See also:
Accounting Expense List
Accounting Worksheet
Setup Accounting

6.7 Sales Summary Report

The Sales Summary Report helps you calculate some of the totals used in My Accounting. It is a good idea to setup a Customer Record with your name to use for Purchases of Personal products, Demos and Sales Aides. These products are marked by Transaction Type (the "T" column in Sales Order) so that they can be grouped and accounted for properly. When you get your Invoice from Avon showing your Discount percent you can adjust your Sales Order by adding this percent as a discount on your personal purchases. When you run the Sale Summary report it will calculate many of these totals for you making it easier to fill your My Accounting entry for the Campaign.

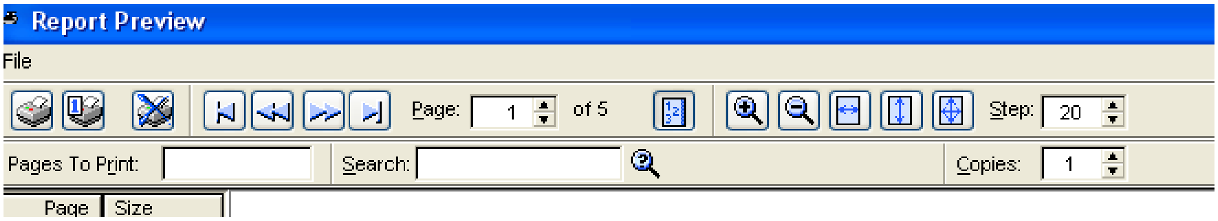
Campaign - Select the Campaign number.

Include Sales Tax - If checked Sales Tax will be included in your Gross Sales amount.

Leadership - Enter any Leadership earnings for the Campaign so they can be added into your income.

7 Reports & Labels

7.1 Report Previewer



MBA Report Previewer allows you to preview all reports before printing. This allows you the opportunity to check and verify before the reports data before comitting to print. Many times you may just want the information and don't need a printed copy. The Previewer helps reduce wasted time, paper and printer ink.

Toolbar Buttons & Controls

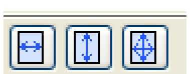
 - Pint report, print ONLY THIS page, Cancel/Do Not print.

 - Preview: First Page, Previous Page, Next Page and Last Page

- Current preview page number, **of** number of pages in report

 - Show or hide the Page List on the left of the Preview window.

 - Maximize or Minimize the preview (make larger or smaller)
Step - The percentage of increase or decrease (+ or -)

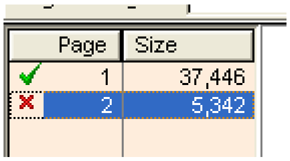
 - adjust preview for Page Width, Page Height or Zoom to 100% (true page size)

 - Save and export this report as an Adobe Acrobat file (PDF). This report can then be attached to an email. Very handy if you have Customers with email address as you can send a copy of their Invoice so they can have payment ready for you.

- This entry field allows you to create a list of Pages to print. Valid Options are: All, None, Even, Odd, individual pages (1,2,5) and page range (3-15).

- allows you to search for pages containing the text you enter.

- the number of copies to print. If the report is 3 pages long and you enter 2 you will print 6 pages (two of each). Very handy if you want to print multple copies of Customer Invoices (one the customer, one for your records)



- Displays a list of all pages in the report. Pages with a Check will print, page with an X will not. You can just double click the icon with the mouse to change. (see Page List button above to Display or hide this list).

7.2 Invoice Batch


Print all Invoices for a Campaign at once. Simply select the Campaign and click on the Print button. Please note that the Invoice will be previewed first so if there any issues or problems you can Cancel before printing. In addition you may use the Copies field in the previewer to print multiple copies of each Customer Invoice if you need more than one (eliminating the need to run the process again for additional copies).

See also:
Report Previewer

7.3 Purchase Order


The Purchase Order creates a report containing all the products you have entered in Sales Orders for the selected Campaign. You choose to have the report sorted by Page Number + Product Number or just by Product Number. All the products are listed with the total count for each (ie. if you sold one each of the same product to three different customers the quantity for that product would be 3). The report seperates items from the Current Campaign brochure from items from previous campaign(s). The PO report also has a additional area for Returns and another for Exchanges.

You may also choose to have the PO report do an estimate on your variable discount and earnings for the selected Campaign. At the bottom of the estimate section is a count of the number of Sales Order for the Campaign as well a count of the number of Sales Order with Processing Charges for the Campaign. The reason some Sales Orders don't have a Processing Charge is that when MBA creates Backorders they are created without a charge.

The Earnings Estimate is a great feature as it also shows your Variable Discount and where your sales are in the range. If you are only a few dollars from the next higher rate it may be advantages to purchase more personal items or supplies as they will be free or almost free (ie. if you are just $3 short of going from a 20% discount to a 30% discount, by purchasing a $3 dollar item your increased discount would create another $20 in earnings profit for the Campaign). Please note that the Earnings Estimate is indeed an estimate, and that other factors like shortages (product No Longer Available) can effect this amount. Shortages usually should have no effect on your Variable discount percent.

To include personal purchases and supplies in the PO just add a Sales Order under your own name.

For Campaign elect the Campaign you are doing the Purchase Order for.

Sort Order List By - Select between **Page Number + Product Number** and **Product Number**

Include Earnings Estimate - Add earnings and variable discount estimate to the PO report.

Uploading - Starting in Version 1.10 Uploading is being added. Uploading allows for your Order to be submited to Avon's website with MBA helping fill in the fields for you. MBA has a built in browser that will navigate to Avon's website and allow you to submit Orders, Refunds & Exchanges. See Setup! - Upload tab to configure uploading

See also:
Report Previewer
Upload
Submit Order to Avon (Uploading to Avon website)

7.4 Special Dates Report

Special Dates Report allows you to print a list of Customer who have a Birthday or Anniversary in the date range you enter. This report can be useful for Customer relations purposes like sending cards or making phone calls on the special day.

Start - The start of the date range
End - The end of the date range (Note: The range is inclusive of both dates)

See Also:
Report Previewer

7.5 Customer History Report

Print a report for a specific Customer displaying all purchases for a given range of Campaigns.

Customer - Select a Customer name.
Starting - The starting Campaign of range
Ending - The ending Campaign of range (Note: Report is inclusive of starting and ending Campaigns)

See Also:
Report Previewer

7.6 Auto Trip Form

As a self-employed business person you are eligiable to expense the business use of your automobile. You must keep accurate records of your business use which includes a record of your trips distance, purpose and date. These two form can be printed and kept in you car for keeping a trip log of business use.

See also:
Report Previewer

7.7 Business Cards

Print Business Cards one or more sheets at a time (10 per page) on standard Avery compatible stock. The name and number are from the Your Info section of Setup.

See also:
Report Previewer

7.8 Brochure Labels

Print labels for your Brochures with your Name, Phone number and the price Expiry Date. Much more professional looking than hand written and alot faster. Prints on Avery 8167 compatible labels.

Date Campaign Ends - the borchure's expiry date.

Number of Labels - Print only as many as you need, you don't have to print a whole sheet.

Starting Label Position (Row & Col) - When doing partial sheets of labels you can start printing part way down a partially used sheet. Enter the starting row and column (numbering starts from top left as Row 1, Column 1).

See also:
Report Previewer

7.9 Customer Address

Print a Customer List that includes Addresses and Telephone numbers.

Display Customer Name By - Select **First Name/Last Name** or **Last Name/First Name**

See also:
Report Previewer

7.10 Customer Phone List

Customer Phone List report lists the Customer names and the first three (3) telephone numbers. This is designed to be a shorter list that the Customer Address List. Handy for keeping in the Car or on your desk for when you don't have your computer on or handy.

See also:
Report Previewer
Customer Address

7.11 Shipping Labels

Print Shipping Labels on Avery 8164 compatible labels (6 per sheet, 3 Rows by 2 Columns).

Customer - Select Customer from drop down list.

Number of Labels - Enter number of labels to print.

Starting Label Position - Select the starting Row and Column numbers (numbers start at upper left)

See also:
Report Previewer

7.12 Profit & Loss

Profit & Loss Statement prints a report showing all the Income and Expense Lines from the selected Campaigns from My Accounting Worksheets. You may print one Campaign or the total of a range of Campaigns. To print for just one Campaign put the same Campaign number in both the Starting and Ending fields.

Starting Campaign - The first campaign in the range.

Ending Campaign - The last campaign in the range (Note **-** the range is inclusive)

See also:
Accounting Worksheet

7.13 Product's Customers

List of Customers that purchase a specific Product for a range of Campaigns.

Product Number - Six digit product number

Campaign Range - Select Starting Campaign number and Ending Campaign number.

See also:
Report Previewer

7.14 Product Purchase History

Print a list of all Purchases of a specific Product for a range of Campaigns.

See also:
Report Previewer

7.15 Helper Reports

Under Main Menu Reports there are two Reports for displaying information about your Helpers.

Helper Discount Report - Lists each Helper along with each Customer Invoice associated with them. The Report totals all the Invoices for each helper and calculates the Helper's discount. After the report is Previewed/Printed you have the option of MBA updating each Helper's Invoice with the discount and recalculating the Invoice total.

Helper Collection Report - Lists all the Invoices for each Helper and calculates a total. This is to help both you and your Helper with the collection of payments. You can have the Report

8 Inventory Shelf

Enter topic text here.

8.1 Inventory List

A sortable and searchable list of all your Inventory. The list can be sorted (both ascending & decending) by clicking on the column name. For example if you click on **Description** the list will be sorted on product name in ascending order (A - Z). If you click Description again the list will resorted in descending order (Z - A). The **Search** field allows you to find records by searching on the selected (sort order) column. For example if the list was sorted on **Description** (as in our example above) and you entered **SSS** and pressed the **Tab** key, the selection bar would go to the first inventory record with the Description of SSS (short for Skin So Soft).

New - Add a new Inventory record.
Change - Edit the selected Inventory record.
Delete - Delete the selected customer Inventory.

Help - Brings you here
Close - Close and exit Inventory Shelf window

See also:
Brochure List

8.2 Inventory Form

 Inventory record for each type of product in stock.

Number: The Product number

Description: The Product name

Shade: The Color or Fragrance

Size: The product size (S, M, L, XL)

Price: The retail price

Cost: The price paid, retail less discount

On Hand: The number of unit in stock

Category: The Product Category

9 Tutorial

9.1 Step 1 - Setup

Step 1 - Before you can use **MBA for Avon** you must customize the software to suit your exact needs. To start your customizing of MBA click on the **Setup!** menu option (top menu). This opens the Setup window where all of MBA's options are configured. The options are all grouped on tabs so that similar settings are in the same area. You start with the My Info tab and work your way through each and every tab. The Setup window has a Help button on the bottom that will call up Setup help topic. Each Tab has it's own Help topic to explain the fields and options contained on it.

9.2 Step 2 - Customers

Adding a new Customer Record

1. Click on My Customers button on toolbar.
2. When Customer List window opens click on "New" button (lower left).
3. Blank Customer window opens ready for your data.
4. If you need help on what each Customer field requires press F1 or click on ?Help button.

Note fields like **Charge Processing Fee** and **Discount** effect other data entry forms like Sales Orders.

9.3 Setp 3 - Sales Orders

Add a new Sales Order

1. Click on Sales Orders button on toolbar
2. When Sales Orders List windows open click on "New" button (lower left)
3. New empty Sales Order opens ready for your input.
4. For more infor on each of the fields press F1 or click ?Help button.

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