

Intelliform
The Distributor Management Solution

Created Specifically for Distributors of:

Ad Specialties
Business Forms
Commercial Printing
Other Printed Products

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Intelliform warrants the physical diskette(s) and physical documentation enclosed herein to be free of defects in materials and workmanship for a period of 30 days from the purchase date.

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INSTALLATION

Intelliform installs easily on most computers and will usually take only a few minutes. However, if you need help, email us at techsupport@intelliform.net. Although you are allowed to change where the program is installed, do NOT install the program under “Documents and Settings”, “My Documents”, “Program Files”, “Windows”, or any of the Windows protected directories since this may result in the program not working due to permissions and/or who is logged in.

Intelliform will automatically create a desktop Icon for you.

When you re-install or upgrade the program, only the program files are affected, not your data files. Your data files will retain all of the information you have already entered

For security reasons, the installation program does NOT allow the program to be installed in the root directory of any drive, including any mapped drives. Also, for security reasons, we do not recommend sharing the root directory of the server.

If you want to have multiple uses or just want to install on a network, please use the Network/Multi-User Installation below.

Single User Installation:

1. download and install the program from our website intelliform.net
2. you can choose to load the demo data if you just want to see how it works.
3. run Intelliform and goto Help -> Intelliform Upgrade.
4. input the Serial # sent to you by email, check Update License, and click Update

Network/Multi-User Installation:

Choose one computer to act as the “server”. The server can be running any of the above operating system versions (except Vista Starter Edition). This computer can be used normally but must be left running for other computers to see and use the data.

1. On the server, download and install the program from our website intelliform.net

Refer to the Recommended Server Setup below to setup your network

2. run Intelliform and goto Help -> Intelliform Upgrade.
3. input the Serial # sent to you by email, check Update License, and click Update
4. on all other computers (clients), create an icon that points to the program IFORM.EXE on the server

NOTE: On each client workstation, you should reference a mapped network drive, not to the UNC directory (eg. Icon target M:\IFORM\IFORM.EXE, not \\SERVER\APPS\IFORM\IFORM.EXE. The reason for this is that a few parts of the program work better with a mapped drive letter.

Recommended Server Setup:

1. On the server, create a directory that Intelliform and/or other network programs will be installed under. For example, C:\APPS on the server.

Do NOT create the directory under “Documents and Settings”, “My Documents”, “Program Files”, “Windows”, or under any of the Windows protected directories since this may result in the program not working due to permissions and/or who is logged in.

1. Share this directory and give full permissions to all authorized users.
2. Install the software to a location in this directory. For example, C:\APPS\IFORM
3. On each client, map the shared server directory to a drive letter. For example, you would map the resource \\SERVER\APPS to M:
4. On each client, create an icon to run the program as explained above.

NOTE: on networks with very high usage, we recommend that write caching be turned off; please see LOCKING.RTF in your Intelliform docs directory.

To install an upgrade:

1. start Intelliform and goto Help -> Intelliform Upgrade.

We strongly recommend you always run Admin -> Fix and Optimize before upgrading

If you are on a network, we strongly recommend you update on the server machine.

Moving your data on the same computer

If you want to move your program or data to a different location on the same computer, you should move your entire Intelliform directory to the new location and then change the intelliform icon to point to the new location.

Moving your data to a new computer

On the old computer that holds the data, go to Admin->Backup and backup to a CD or Flash Drive. On the new computer, download and install the program file from www.intelliform.net Then run intelliform and use Admin->Restore to restore from the backup you made . You will probably need to setup Email again and adjust the icons on any other computers

GENERAL SETUP

General Setup

After you have installed the software, you will need to set up the program by entering some basic information about your business. The setup will take about 10 minutes.

1. Click on FILES -> LISTS -> SALES TAX ITEMS. Every Customer and transaction must have a Sales Tax Item. If you are going to connect to QuickBooks, this must be exactly the same as you have setup in QuickBooks (please refer to Section Connecting to Quickbooks). If you have multiple sales taxes, refer to Section Multiple Taxing Authorities. If you are not connecting to Quickbooks, ignore any references to QB.
2. In a similar manner, click on FILES->LISTS->TERMS and FILES->LISTS->SHIP VIA and edit or add the items you will be using. If you wish, you can add to or edit the other lists in FILES->LISTS now. However we suggest you continue with setup now and go back and add or edit them later (see Customization).
3. Click on ADMIN->SETUP.
 - 3.1. On the first tab, (General); you will see your company name and address. Make sure your company information is encoded into the program exactly as you desire. If your company information is incorrect, please email or fax the correct information to us and we will send you a new license.
 - 3.2. Enter your phone, fax, cell, email and Web addresses. You can change these fields at any time.
 - 3.3. Next, click on the Default tab. The customer defaults you set here will automatically be entered whenever you create a new customer in Intelliform. As such, they should be the ones you commonly use. However, you always have the option to change the default for each individual customer whenever you wish.
 - 3.4. The sales defaults are set at "Quote", which means when you enter a new template into the program, Intelliform assigns the status as a "Quote". The other description charges (Artwork, Setup, and Rush) may be changed to whatever you prefer (for example, "Film" or "Proof") or left blank. "Fastening" refers to Continuous Forms and "Packaging" defaults to "Standard". Again, you always have the option to change these defaults for individual customers or even specific jobs as you enter them.
 - 3.5. The Unit cost/price # decimals defaults to 4/5 decimals; you can set this to 2-5. The Multi-Item # decimals defaults to none; you can set this to 1-4, if needed (e.g. 5.5 feet of rope).
 - 3.6. Next, click on the Print Settings tab. Check the boxes of Address Includes you want to include in your company address on printouts going to customers or vendors. Note that if you include Email in your company address then the email address will be the Sales Rep email address for a particular transaction or the company email address for reports or blank Sales Rep email address.
Click the Product # box if you wish to print it on your invoice. The Product # refers to stock items and whether or not you assign your own number to specific jobs or products (called Template # in Edit). An explanation of how to create and use Product #'s can be found in section Procedures. If you wish to add images to documents or adjust margins, see the Document Images and Adjustments in section Procedures.
For Invoice note, click on the Invoice button and enter whatever message you wish to appear on all invoices. This message might be "Thank you for your business!" or a reminder about your payment terms or whatever else you may wish to communicate on every invoice. The same applies to the other Standard Notes. Note that you can choose both font and color for each note. .
 - 3.7. Click on the QuickBooks tab if you plan on posting your Intelliform data to QuickBooks. The default is to post all of your data except Sales Reps. If there are some items you prefer NOT to be posted, remove the check from the appropriate box. At this time, do not click on the "Connect to QuickBooks" check box. We will continue with the Set Up and tutorial before setting up the QuickBooks connection. The

connection to QuickBooks requires a few initial decisions and several steps on your part. Because of this, we will address the connection separately in the section Connecting To QuickBooks.

3.8. The Email/PDF and Fax tab is covered below.

3.9. The Display tab allows you to change various settings to add a little color

4. Click on ADMIN -> USERS.

4.1. To setup a user, click on the ADD button at the top right of your screen. Under user, in the highlighted cell, type the name (first names only are OK) of the first user. Skip the "Inactive" column. You will use the inactive column if this person ever leaves your company.

Password, Group, and Restrict To columns are all use for security and user restrictions. At this time, do not enter anything in these fields. After you have set up the system, please review the Security and User Restrictions section in this manual for how to setup and use these fields.

4.2. You may enter as many users as you wish. However, you are restricted to the number of users that can access Intelliform on a network at the same time. In other words, if you wish for two users to access Intelliform at the same time from two computers, a license for two users is required. Also, a separate license is required for each sales rep, regardless of the number of computers the program is installed on. Note: "Guest" is for training purposes. It allows someone to use the program without giving them the ability to change your preferences or settings (such as column widths, order, etc.)

Setting Up Email, Fax, and PDF Capability

Intelliform includes the ability to Fax or Email any form or report that Intelliform produces. To enable Email or Fax or PDF functions for Intelliform on your computer, follow these step-by-step instructions:

First, you must create a PostScript printer definition in Windows: You do this by adding a postscript printer, even though you don't actually have the printer. In Windows add a Local printer, port LPT1, and choose a postscript printer from the lists. Postscript printers have the word Postscript in the name or a PS at the end of the name. We suggest HP Color Laserjet 2800 PS. If necessary, have windows load more printers. Add the printer on every computer that will be using Intelliform.

Next, in Intelliform, select ADMIN->SETUP, Email tab and select the printer you added.

EMAIL:

To utilize this function, you must first have a working email client on your computer. (In other words, you must already be able to send and receive email.). **NOTE:** if you email through a web browser (e.g. gmail, hotmail, verizon, etc), this is NOT an email client. In this case, you need to setup an email client. If your email address is using outlook.com or Hotmail.com **and** if you have any version of Outlook, we recommend that you use Outlook and choose OFFICE as your Email System; if you have Outlook 365, you need to install Outlook on your computer.

Otherwise, use any MAPI compliant client such as Thunderbird. If you are using Windows Live Mail, you can continue to do so, even though Microsoft has discontinued the program. You can still use WLM even if you have an outlook.com account but see the WLM setup instructions under Help. If you chose MAPI then you must have a registered email client that is MAPI compliant. This can be Microsoft's Outlook, Windows Mail, Windows Live Mail, Thunderbird or any other MAPI compliant email client.

IMPORTANT: The email client must be the default email, ususally set when you start the email client; if necessary, see windows control panel Default Programs.

FAX:

Click on the Fax tab. To enable Faxing, choose the fax system you wish to use (currently only MSFax).

MSFax is Microsoft's built in fax and is a client application; this means that each machine that you wish to fax from in Intelliform must have MSFax installed and have a modem and phone line connected to it. MSFax is

available on XP, Windows 2003, Vista Business or Ultimate (not Home), Windows 2008, and Windows 7/8/10. Please refer to Microsoft's Fax Console or Fax and Scan for more information.

ERROR MESSAGES: if you get an error message for email or fax, please see the Error Messages Section at the end of this manual

Command Line Switches

You can include the following switches on the target line of the Intelliform icon or as a command line switch. These can be very useful when the program won't run for some reason and/or for automatic backup

/F runs Fix and Optimize

/FF same as /F but exits if can't run and runs backup first

/R runs Restore from backup

/RS runs Restore system file only

FILES

Accounts

select FILES -> ACCOUNTS

Here you can add or change the accounts as needed. Accounts are used explicitly for Pay Bills and implicitly for all other transactions. With version 21.03, we do not feel that most will need any other accounting software. However, if you connect to QuickBooks, then these accounts should match QB accounts.

Some common accounts have been preloaded for your convenience. All of these can be edited or deleted except for the standard accounts Checking, Investments, Accounts Payable, Sales Tax Payable, Owners Draw, Returns & Allowances, and Cost of Goods Sold.

Ledger will show the history of any account. This is particularly useful for Checking as it will show your current bank balance and you can Add/Edit any type of transaction that is shown by highlighting that line and Add/Edit.

Sales Reps

select FILES -> SALES REPS

If you use Sales Reps, you can enter them here along with their commission %.

Customers & Vendors

select FILES -> CUSTOMERS or VENDORS

Here you can add or change customers and vendors. The Additional Information is the defaults that are used for transactions.

History will show the details of the customer or vendor, which you can print.

Import Specifications

Select FILES -> IMPORT SPECIFICATIONS

Here is where you define the different CSV formats for downloading CSV files. These can be for credit cards, bank statements, or any other online institutions that allow you to download a CSV file. You only have to do this once for each institution. Each periods files can then be downloaded and imported into Bills/Checks.

Lists

select FILES -> LISTS

You can add or edit the various lists, as needed. Product Types can be used to further categorize the different transaction types in Sales Transactions.

TRANSACTIONS

Sales

select Transactions->Sales

The same transaction is used for Quotes, Orders, and Invoices; just change the status as appropriate.

Status "Sale" is used for immediate payment in full by the customer; "Invoice" is used for full/partial/credit payment later. Accounts and Inventory are posted as of the invoice date

Print will print, email, or fax the transaction.

Multi-Line Invoices

select Transactions->Multi-Line Invoices

These combine Sales from the same customer into 1 invoice.

Print will print, email, or fax the transaction.

Receipts/Credits

select Transactions->Receipts

The same transaction is used for receipts and credits and is applied to the invoices. Discounts per invoice are allowed (eg 1% 10) as well as a general Credit. Entering a discount % in "Apply Disc %" will automatically apply it for each invoice you click pay or "Auto Apply"

Print will print, email, or fax the transaction.

Debit Memos

select Transactions->Debit Memos

This will produce a debit memo for the customer that is not an Sale, such as a finance or late charge. It is paid for with Receipts just like an invoice.

Print will print, email, or fax the transaction.

Pay Bills/Checks

select Transactions->Pay Bills/Checks

This will write a check to pay a bill without entering an invoice or item; you debit or credit the accounts directly. You can import any CSV file you have defined and downloaded. The next time you load a csv file, the system will preload the accounts from the last time, which you can change.

NOTE: you can add one or more balance sheet (Asset/Liability/Equity) accounts and use it as the Bank Account in Pay Bills instead of "Checking"; for example, this allows multiple bank accounts or investments.

The system considers that a vendor bill exists for the costs whenever a sale status is Invoice, ML Invoice, or Sale. When you pay that bill, you should use the account Accounts Payable. This tells the system that the payment is for a vendor bill from a sale. If you use some other sales or expense account, your P&L will still be correct, but the Vendor Aging report will not be. You can include one, many, or all bills from a vendor in a single payment. Payment of vendor bills is like credit card payments; e.g. you do not pay individually bills like receipts for customers.

Note that all the cost in the sale is considered the bill, including Freight cost. In the unusual case that you need to pay the freight separately to another vendor, then make the freight as a Partial of the sale to that vendor or do not include the freight cost in the sale and pay outside of Accounts Payable. If you are paying a bill that should be in Cost of Sales but is not on an invoice, use the account Cost of Goods Sold.

When you pay sales tax, use the account Sales Tax Payable, not the other tax accounts that are for other taxes like income, property, etc.

For all other operating expenses, use an Expense, Tax, or Sales account. All of these reduce the Net Income on your P&L. Use the Sales account only when you wish to reduce the Net Sales on the P&L. Payments to Asset, Liability, or Equity accounts do not affect the P&L. There are 3 exceptions to this, Accounts Receivable, Accounts Payable, and Sales Tax Payable as explained above. Examples of using other Asset Liability or Equity accounts are: Owners Draw for payment to you as the owner or Investments for money put in other types of funds, Note that amounts can be negative to do the opposite of what you normally expect, such as refunds from vendors or returning money to the checking account from Investments. Print will print the check.

Downloading transactions in Pay Bills:

You can download transactions from anyplace you do business with directly into Pay Bills; most often this would be credit cards or bank accounts or even stock transactions. All downloads must be in CSV format. For each place you want to download from:

1. Download a sample file from their website,
2. Set up a specification in Files->Import Specifications. If you have trouble doing this, email us and we will help you thru it.

When you want to import into Pay Bills:

1. Download the .csv file for the dates you want
2. Add a new bill in Pay Bills
3. Enter the vendor, like PNC Bank or Citizen Visa
4. Click the Load CSV File button and import the file.
5. Delete unnecessary lines like the payment line in Credit downloads
6. For bank accounts, also delete lines you recorded in other Pay Bills, including the payments to vendors for Accounts Payable
7. Add the account for each line

This can save much time and effort. Even better, it will fill in the account number also the next time you download again, like next month card or bank.

Vendor Aging and Vendor History:

You can get a vendor history by right clicking in any screen or vendor aging from the Reports menu. However, in order to be most useful, you will want to set the beginning balance for each vendor, otherwise all the old vendor invoices will keep showing up. To do this:

1. Decide when you want to start accounting and vendor payments. For example, say you want to start July 1st.
2. In Pay Bills, enter the payments to each vendor for each bill since July 1st. Remember to use Accounts Payable as the account.
3. For each vendor, start a new Pay Bills, set the date to June 30. Right click and select Vendor History. Use the last entry amount as the payment amount, less any outstanding bills you haven't paid yet.

CONNECTING TO QUICKBOOKS

Once you are connected to QuickBooks, transferring information from Intelliform to QuickBooks is both fast and easy. **To set up the connection, you must setup Items, Accounts, Sales Tax Items, and Sales Reps in BOTH Intelliform and Quick books BEFORE posting to QB.**

1. Open Intelliform. Click on Files -> Lists -> Sales Tax Items.

When setting up sales tax items in QB, you must use the Item Type as “Sales Tax Item”, the Tax Name as the Sales Tax Name in Intelliform (e.g. “Non Taxable”), the “Tax Agency” as a Vendor in both QB and Intelliform, and the Rate as the Tax % in Intelliform (the Description in QB can be anything you wish). All must match **exactly** between QB and Intelliform, including spaces, periods, etc.

NOTE: Intelliform can NOT connect to Sales Tax Groups in QB; every Sales Tax Item in Intelliform must connect to a Sales Tax Item in QB.

2. Click on Admin -> Setup and choose the QuickBooks tab; you will see the following Dialog Box. Click on the “Connect to QuickBooks” box.

The “**Post:**” boxes are all checked by default, except Sales Reps, and assumes that you wish to post all of the data from Intelliform to QuickBooks. Refer to the notes below for Sales Reps. If you do not wish to post certain categories of information, uncheck the appropriate box.

NOTE: We recommend that you **do** post Customers and Vendors. By doing this, you do NOT have to add Customers and Vendors in QuickBooks. They will be added automatically when you Post from Intelliform and anytime you add or change any customer or vendor information (such as the address, phone number, fax number, tax status, etc.) in Intelliform, that information will be automatically updated in QuickBooks whenever you post. However, the disadvantage of this is that the individual fields of Salutation, First, Last, Credit Limit, and Custom Fields in QuickBooks cannot be used, as Intelliform will overwrite them.

There is one caveat though. Since QB does not have a customer or vendor #, it keeps track of and matches the customers and vendors by the name. Therefore, if you change the name in Intelliform, QB will think it is a new customer or vendor. This sounds worse than it is; you can either make the same name change in QB or , if you forget, you can easily combine customers or vendors in QB.

3. The General Accounts are the same as the default accounts in QuickBooks. If you wish to change them you must change them in both Intelliform and QB.

** Note: For Undeposited Funds, you MUST let QuickBooks create this account if it does not already exist. To do this, create a dummy invoice in QB and SAVE it. QuickBooks will now create an Undeposited Funds Account due to the presence of the dummy invoice. Now, go back into “Invoices” and delete the dummy invoice.

4. The Transaction Accounts are setup as follows:

Every type in Intelliform must be linked an item in QB as follows;

- the QB Item column here must match a QB Item “Name”; the item type in QB is usually a Service or Non-Inventory Part but cannot be a Sales Tax Item.
- the Sales Acct here must match the QB Account **in the Item Screen**

For our default Forms, you must create an Item in QB named “Forms” with the account “Sales”

Here is where you can categorize the Items, Sales and Accounts for Intelliform and QB. In Intelliform, this allows you to split the Sales and other reports into the different categories you want; in QB, this allows you

to have a P&L and other reports also split into the same or different categories. Again, the Items and Accounts in Intelliform must match the Items and Accounts in QB; if you are using sub-accounts, enter the sub account in Intelliform as shown in the Edit Item screen in QB (eg Sales:Sub Account 1)
When finished, Save and then close the window.

5. Click on Files -> Lists. For each of the following lists, add or change the items as you wish.
Terms, Ship Via, Pay Methods, Customer Types, Vendor Types
These lists correspond to the lists of the same name in QuickBooks. You must verify that they are EXACTLY the same as in QuickBooks, including spaces, capitals, and punctuation. QuickBooks may have more items than Intelliform; but if they are in Intelliform, they must also be in QuickBooks. Should you ever decide to add to any of the lists, you must do so in both Intelliform and QuickBooks for the transmission of information to be successful.
Note: Customer and Vendor Types are optional in both Intelliform and QB but once you create them in QB, QB does not allow you to change them. For this reason, we do NOT recommend you use Customer and Vendor Types.
6. If you don't need Sales Reps in QB, don't check the box. If you do use them, you must add the Sales Reps in QB with exactly the same Name and Initials as in the Intelliform Sales Reps. The Sales Rep Type you use in QB should be noted here. If you make any change to the Intelliform Sales Reps Name or Initials, you must change them in QB or else post will not work.
7. We supply you with a sample QB file that has already been set up with the defaults. If you wish to use it, copy the file IFORM.QBW from the Intelliform program directory to your QuickBooks directory and change its name to whatever you wish; e.g. ATLAS.QBW
In any case, open QuickBooks and verify that all items, accounts, and lists match the ones you have setup in Intelliform.

If you have not yet entered data into Intelliform: You are all set! Once you begin entering data into Intelliform and wish to Post, proceed to the end of this section.

If you have entered data (Invoices and Receipts) into Intelliform, you must now determine what you wish to post from Intelliform into QuickBooks. If you wish to post ALL of the Invoices and Receipts, follow the "A" instructions below. If you wish to post NONE of the Invoices and Receipts, follow the "B" instructions. Finally, if you wish to post SOME of the Invoices and Receipts, follow the "C" instructions.

A.) To post ALL of the Invoices and Receipts

If you wish to post ALL of your existing invoices and receipts from Intelliform to QuickBooks, proceed to section "Posting to QuickBooks". The first time you post to QuickBooks, all existing invoices and receipts will be posted.

B.) To post NONE of the Invoices and Receipts

If you do not wish to post any records into QuickBooks (for instance, you may have already been entering information into QuickBooks and do not wish to post those entries into QuickBooks a second time):

1. Open Intelliform.
2. Click on "System" from the Main Menu.
3. Click on "Post to QB" (You will receive a message that reads: Post to QuickBooks All unposted transactions will be posted to the QB file: IFORM.IIF. After posting, import the file into QuickBooks. Warning. Any previous import files will be deleted).
4. Click on the "Post" button.

You are done! None of your records will be transported and posted to QuickBooks, *even though you selected Post to QB*. That's because you are sending these records to a temporary transport file. The next time you wish to transfer data to QuickBooks, proceed to section, "Posting to QuickBooks". The next time you select "Post to QB", you will OVERWRITE the temporary file, thus ensuring that the previous records you selected for non-transfer are, in fact, not transferred. At the same time, the records being selected the second time WILL be transferred to QuickBooks.

C.) To post SOME of the Invoices and Receipts

If you wish to post SOME, but not all, of your records into QuickBooks:

1. Open Intelliform
2. Click on "System" from the Main Menu
3. Click on "Post to QB". (You will receive a message that reads: All unposted transactions will be posted to the QB file: C:\IFORM\DATA\IFORM.IIF. After posting, import the file into QuickBooks WARNING: Any previous import files will be overwritten.)
4. Click on the "Post" button
5. Tab over to the "Post" column, which is designated by the letter "P". For any records that you want to post into QuickBooks, you must first UNPOST them in Intelliform (Yes, Unpost!) Unpost records by first selecting the record you want (highlight the record) and then click on the Unpost button to the right of the screen. The letter "N" will appear in the Post column to designate unposted records.
6. Select "Post to QB" a second time. (You are sending these records to a temporary transport file.) You will now OVERWRITE the temporary file, thus ensuring that the previous records you selected for non-transfer are, in fact, not transferred. At the same time, the records that you unposted in Step 5 above WILL be transferred to QuickBooks.
7. Now open QuickBooks. Click on File, then Import. An Import dialog box will be presented and under the file name box, you will see a list of files. Double click on the file named "iform.iif " and your file will be imported into QuickBooks.

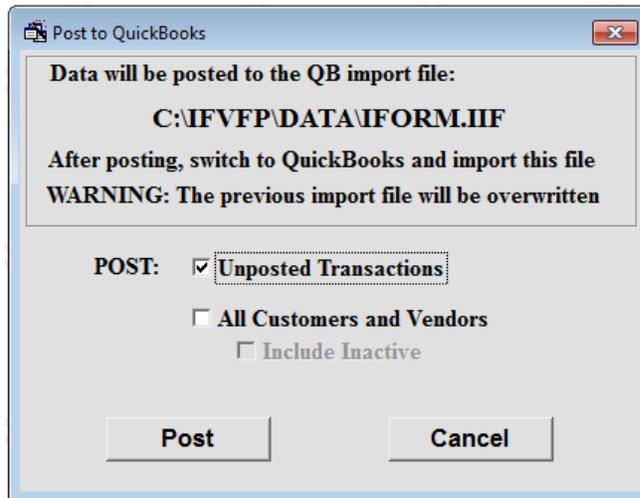
You are done! The next time you wish to transfer records to QuickBooks, proceed to the end of the section, "Posting to QuickBooks".

POSTING TO QUICKBOOKS

Once the connection between Intelliform and QuickBooks is set up, transferring your data to QuickBooks is very simple, consisting of only a few keystrokes.

To Post to QuickBooks:

1. Open Intelliform. From the Main Menu, click on SYSTEM, then "Post to QB". You will then see the following window on your screen:



Click on "Post". This will post all Invoices and Receipts that have not been previously posted to the QuickBooks import file, **IFORM.IIF**. This file will be located in your Intelliform data directory: **C:\IFORM\DATA\IFORM.IIF** (Note: This is the default path.) If you are on a network, the path might be something like, G:\INTEL\DATA\IFORM.IIF. Please refer to Network Installation Instructions for an explanation of the Program and Data Directories.

Note that "All Customers and Vendors" will update customer and vendor information in QB so that you can maintain changes to addresses etc. in Intelliform only, even if you do not post transactions.

2. Immediately after the above step, switch to QuickBooks. Click on FILE, then IMPORT. (An Import dialog box will be presented). Change to the Intelliform directory noted above, **C:\IFORM\DATA\IFORM.IIF** (again, this is the **default** path) and then double click on the file named, **iform.iif**. This file, which contains your Intelliform data, will be imported into QuickBooks.

Testing the Connection

To test the connection, simply enter one or two sample invoices and follow the steps above. Open QuickBooks; click on Invoice and then Previous to display the invoice you just transferred. Make sure all of the appropriate information was transferred. If you are satisfied that the information is complete, your connection is successful. If an error has occurred, it is most likely due to an incorrect set up. Go back to the set up procedures and verify that the fields in question match exactly. To maintain accurate accounting records, make sure you delete the sample invoice and sample bill that you transferred into QuickBooks. You can delete the invoice by entering Accounts Receivable from the Chart of Accounts (in Lists), clicking on Edit and then "Delete Invoice". You can delete the bill by entering Accounts Payable from the Chart of Accounts, clicking on Edit and then "Delete Bill". We recommend that when you first begin transferring information electronically, you do so frequently.

This will better enable you to become familiar with the process and also help to ensure that the connection is set up properly. (Note: We also recommend that you first print a report of the forms that are unposted. That way you can check to make sure all your forms were correctly posted to QuickBooks. To run this report, see the “Unposted Orders” report in section Reports.)

Double Posting in QuickBooks

If you discover duplicate information in QuickBooks, the user forgetting to first Post in Intelliform has caused it. By forgetting to first post in Intelliform, the transfer file that was created previously remains the same (it is not overwritten). Therefore, when you import into QuickBooks, you are simply posting the old information a second time.

Missing Information in QuickBooks

If there is missing information in QuickBooks, then the probable cause is running Post twice in Intelliform before importing into QuickBooks. This is the opposite of Double Posting above. The transfer file for the 1st Post in Intelliform is overwritten by the 2nd Post in Intelliform and the 1st Post never gets imported into QuickBooks.

Correcting Posting Errors

If you make an error in posting to QuickBooks you can correct it in one of two ways:

1. Make any necessary corrections in both QuickBooks and Intelliform.

OR

2. A. Delete the Invoice, Bill, Receipt or Memo in QuickBooks.
B. In Intelliform, correct the Invoice or Receipt and then unpost it. This will result in the record being posted again when you follow the two steps at the beginning of this Section.

CONTACT MANAGEMENT

Intelliform incorporates a simplified contact management system. The features are:

User Defined Fields. You can define your own fields for customers for any information you want; refer to the section Customization for further info.

Contact lookup. Press F6 or choose Contacts from the File menu. You are presented with a complete list of all contacts for instant lookup with all the power of our standard grids. You can then edit, email, or send letters for any of these contacts.

Letter Templates. Choose Letter Templates from the File menu. Here you can Add or Edit templates. You must have MS Word 2003 or later to use Templates or Letters. The format of the letters is set by the extension you choose; “.DOC” for standard MS Word document (default), “.RTF” for rich text format, and “.TXT” for plain text format. Add any standard letters you may want to send your customers (Thank You for meeting with you, Seeking a meeting, etc.) These should be a letter without any salutation or address. Some examples have been loaded for you.

Right Click. You can right click anywhere in any of the Files or Transactions to choose to send an email or write a letter. For a letter, you will be presented with the Letter Template you choose merged into a temporary document with the address filled in. For example, when you Edit a customer, you can right click and send an email or letter to the customer, any of the contacts, any of the ship to addresses, or to the billing address. After printing or emailing (from Word), you would normally not save the merged document.

You can define additional Status terms for customers or vendors by choosing Files->Lists. For example, you can add the status Prospect to the customer status and enter all your prospects in the customer files. You can then apply a filter to the customer grid to only show Prospects whenever you want.

GENERAL PROCEDURES

Grids are the spreadsheet style forms that are opened when you click on any Transactions or Files on the main menu. For example, TRANSACTIONS->SALES

From these, you can do an incredible number of things as indicated by the buttons on the right. In addition to these functions, you can customize each grid to your preference.

Grid Preferences

You can change settings for each grid and save those preferences.

You can:

- change the size of the entire form
- drag columns to new positions
- change the width of a column
- set the order to any of the bold column headers (double click)
- set a filter to any of your filters defined below

After you have it the way you want, click on SYSTEM-> PREFERENCES-> SAVE PREFERENCES.

You can restore the default preferences or clear all your preference settings at any time.

Grid Seek Function

To quickly find something within the entire database, use the “Seek” function. Put the cursor anywhere in any column with a bold header. For instance, if you wish to find a specific customer within the Sales List, put the cursor anywhere in the customer column. Press **F8** on your computer keyboard and the SEEK window will appear in the upper right of your screen. Start typing the name of the customer you are looking for and Intelliform will go to the first entry for that customer. To find a specific reference number, use the Seek function in the same manner. To turn off the Seek Function, press **F8** a second time. The Seek Function will automatically turn off when you open a form.

To find something in a column that is not bold or to find something that is contained within a field, put the cursor in the column you want and click the Find button.

Grid Sorting

The easiest and fastest way to sort is to place the cursor on the field heading, (i.e. Customer, or Follow up Date, etc., and double-click.

Grid Filter

Filters are an easy way to quickly look at any subset of the data that you want. You first define subsets of the data and then choose the one you want depending on what you are doing at the time.

For example, for the Sales grid you can define a filter for “Status=Order”, another for “Status=Quote”, another for “Orders this month”, another for “Follow up this month”, etc. and then choose any of them after you open the Sales grid.

Another example would be to define a filter for “Status=Prospect” in the customer grid for viewing only prospects.

Document Images and Adjustments

In Admin->Setup/Print Settings, you can choose image files to print on the documents listed and adjust the top or bottom margins, if needed. All graphic images must be files in your data directory and the format can

be any of TIF, TIFF, BMP, GIF, JPG, JPEG, or PNG. The top left corner of all images is at 0,0. Customer images can be as big as the whole page or any smaller size with the top left corner at 0,0. The maximum size of vendor images is 2.5”w X 2”h. In windows Paint, a size of 3000 pixels x 4000 pixels for a 300 dpi image will fill the entire page; or 1800 x 2400 for a 180 dpi image. Top and Bottom margin adjust in 1/6 “ increments. Indent will indent the Co. Heading in 1/32” increments.

The document you choose here is the default that can be changed in the print dialog. The print dialog gives you a choice of Plain Paper, Letterhead, or Preprinted Form. That choice refers to what is printed, not the graphics. Plain Paper prints the Co. Heading, Boxes/Outlines, and the Data; Letterhead prints the Boxes/Outlines and Data; Preprinted prints only the Data.

Note that you can use the customer images for different things like background image (DRAFT spread across page), special notices or images in any blank space in document, your skydiving picture, etc. Please see the sample under Help-Documentation->Invoice Graphic Sample.

Multiple Vendors for One Order

When you have multiple vendors for the same job, enter one “Master” form in Intelliform as well as any number of “Partial” forms relating to the same Master. Using the same reference number links all of the forms. Simply enter the identical reference number to all the forms in the “set”. When you enter the same reference number a second time, Intelliform will advise that a duplicate reference number has been entered and should be used only for multiple jobs. When you select “Yes” to continue, Intelliform will automatically change the status of this form to “Partial”. The “Next” and “Previous” buttons at the bottom of the template will allow you to easily toggle between different forms in a set. (Note: You can change which form in a set is the Master at any time by first changing the status from Master to Partial. Once all forms in the set are designated as “Partial”, select whichever one you want to become the new Master.)

The Master form addresses the customer and selling price side of the transaction. The Master form is the main form in a job with two or more vendors and is otherwise the same as any other form in the program. Its status can be Order, Quote, Invoice or Dead. The Master form will be used for all communication with the customer and will reflect the TOTAL selling price to the customer. Customer quotes, acknowledgments and invoices will reflect the information on the Master form. The vendor chosen for the Master form can be any of the vendors involved. However, the one chosen should probably be the one that reflects the specifications for the customer. The cost on the Master will normally reflect the cost for that vendor only. However, you can switch between showing cost/margins with or without the partials by clicking the [+Partials] button when you edit the Master form.

The “Partial” form addresses the vendor and cost side of the transaction. It is designated as a Partial Form in the Status Field whenever you duplicate the reference number of a Master form. All selling prices and margins in the Partial forms should be left blank since all Partial forms pertain only to Vendors costs.

Impact on posting to QuickBooks: The cost of the transaction and the selling price in the Master will be transferred to QuickBooks when you post. The cost from ALL of the partials will be transferred to QuickBooks. Any selling price you enter into a “Partial” form WILL NOT be transferred to QuickBooks.

NOTE: This capability applies to Multi Item orders as well as Forms.

Lot Pricing

Whenever your unit of measure is “LOT” in any Form, the total price will remain the same regardless of the quantity shipped. For example, assume you place an order for 1,000 units at a lot price of \$100.00 and the manufacturer delivers 1,100 units. Intelliform will calculate your delivered price to be \$100.00 because you quoted a “LOT” price which, by definition, does not take into consideration over runs or under runs. If you wish to bill (and to have Intelliform calculate) over and under runs, you must use any other unit of measure. (M, Each, C, CTN, Box, etc.)

Previous Job Number

The previous job number will not print on the purchase order (or request for quote) whenever there is no previous job in Intelliform. Therefore, if it's not already in Intelliform, you'll have to write the previous job number in the special remarks section the first time you write up that order. That's by design because: When you have a previous job number in Intelliform, it will allow you to request quotes from various manufacturers without going back to the template and erasing the previous job number, thereby creating confusion for the manufacturers who didn't do the job. For instance, let's say you have Job #123 in Intelliform done by Vendor A and want to send the specs out for quote to four different manufacturers. Intelliform will automatically suppress the previous Job # 123 for Vendors B, C, and D, but print the job # for original vendor A. However, in order to have this capability, it will not print a previous job number if there is no such job in the program. If you try to put a previous job number in a new entry, you will receive the message, "No previous Job number", which means you'll have to put it in the special remarks section.

Product Number Field (Creating Form Templates)

The Template # field is particularly useful when selling stock items where the specifications are the same for each product sold. By creating templates for stock items, you can quickly recall stock items for fast quoting and ordering. To illustrate this capability, first create a test company, i.e. "ABC Company" or "Test Company" just to learn this feature. You can then delete the company when you're comfortable with creating templates.

Lets assume you would like to create a template for 9 ½" x 11" continuous stock paper, white, 20#, 1 part and you wish to use the "Other" template. (Remember that you can name the other template anything you wish.)

1. From the Sales List, select ADD, then OTHER to enter a new form in the usual manner. However, instead of entering a customer, leave the customer field blank and press the TAB key. You receive the message, "Create Template"? Select Yes. (Notice that the status changes to "Template".)
2. Tab down to Product # field and enter the product number you wish. This may be the stock number of the vendor you use for this item or a number of your own creation. The number that you choose, however, will always represent the specifications for this item. In fact you can also think of templates as "items". In this example, let's enter A 001 into the product number field. (**Note:** The jobs in this lookup will be by the Product # you assign and the order of the lookup will be by the lowest number first.)
3. Go to the description field and enter "Stock Paper, 9 ½" x 11".
4. Go to the Specification Tab and enter the specifications: Size (9 ½ x 11), Weight (20#), Grade (N/A), Color (White), Ink (N/A). The stock number field in this section can pertain to a manufacturer's stock number for ordering purposes. If you always order this stock item from the same manufacturer, you may wish to enter that stock number. Also, if you always order a particular item from the same manufacturer, you may wish to enter the vendor information into the Quote Tab as well. If, however, you order the same stock item from several different manufacturers, you should leave it blank and only enter it when ordering from that particular manufacturer. (You could also choose to set up identical templates/items for different manufacturers if you wish to do so.)
5. Click on SAVE to save the template. You are now ready to use the template.
6. From the Sales List, select ADD to add a new form. Next select "Other" from the TYPE window.
7. Enter ABC Company.
8. Tab to the Product # field and press the ENTER key.
9. A dialog box entitled "Previous Product #'s - Enter to choose" will appear and you will see A 001. Select this item by pressing the ENTER key and all of your stock item information will be automatically entered.

You are now ready to quote, order or whatever you wish to do with this product without having to think about entering specifications. This feature works particularly well in conjunction with the multi-line invoicing capability of Intelliform.

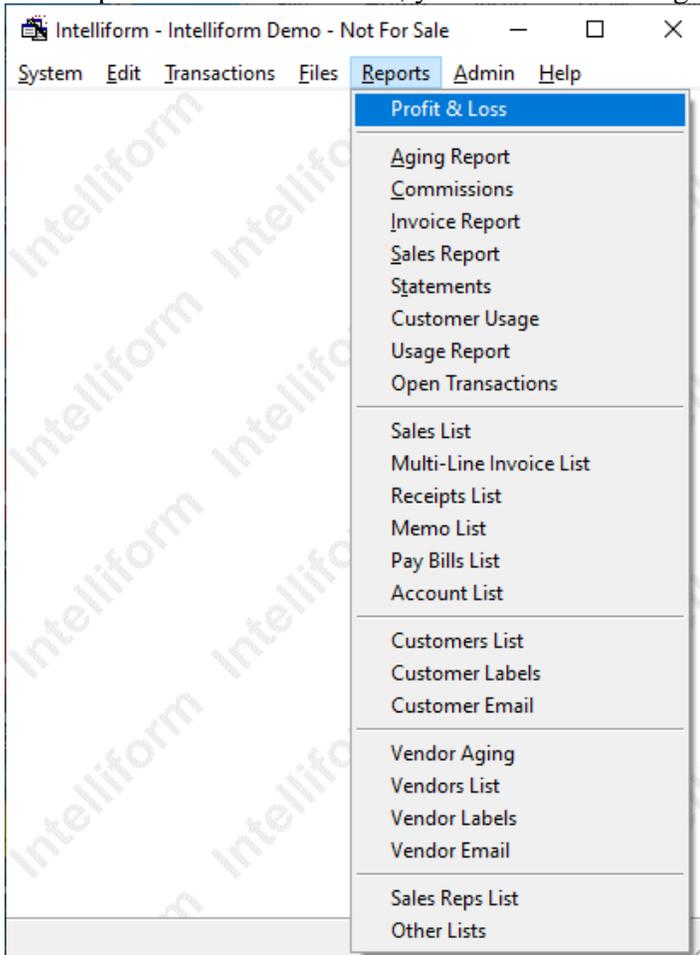
Colors

Except for the colors specified in setup, all other colors are the colors you set for windows. Note that the background of all forms is specified by the “3D Objects” in windows preference.

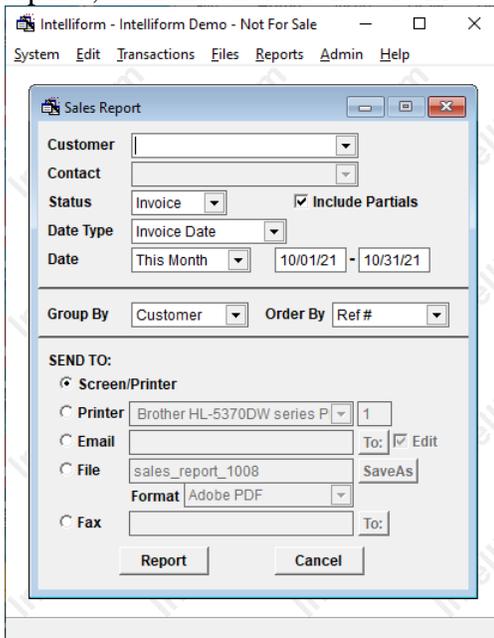
REPORTS

Predefined common reports:

When you click on Reports on the main menu, you see the following:



The 1st group of reports (Profit & Loss, Aging, Commissions, ...) are the predefined reports that give you the most common reports, with the choices that are most used. For example, the Sales Report is:



You have great flexibility in the choices: Status (Invoice, Order...), Date Type (Invoice, Order, Paid...), Date Range (This Month, Year, Last...Custom). You can also Group By (Customer, Vendor, Type, Tax...) which will group and total by your choice.

SEND TO: allows you to choose where you want to report to go.

For Screen/Printer the report is first previewed on the screen and then you can send to any printer/device

For Printer you can send directly to any printer and the # copies to print.

For Email, the system will default to an email address if it can, but you can also click the To: to choose from all the intelliform contacts. When you click Report, if the Edit box is checked or there is no email address, then the system will bring up your email client and you can add other attachments (like artwork) and other contacts from your email list.

For File, the system allows you to save the report in many different formats.

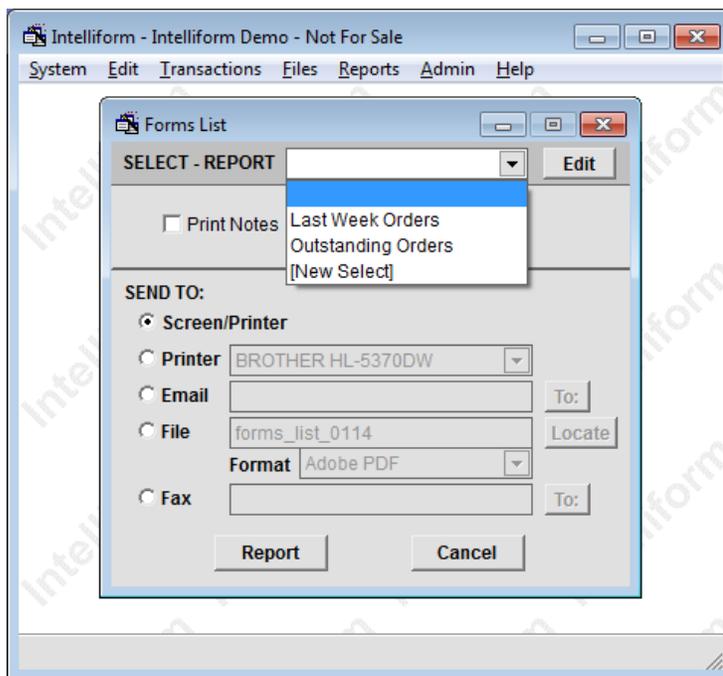
For Fax, you can choose from intelliform contacts and the fax(s) are sent automatically. You can also fax by choosing Screen/Printer and sending to the fax printer; this allows you to add a cover page etc. but you must input the phone number(s) manually.

Note that you must setup intelliform to enable Email and Fax (see the Setup section)

Select reports:

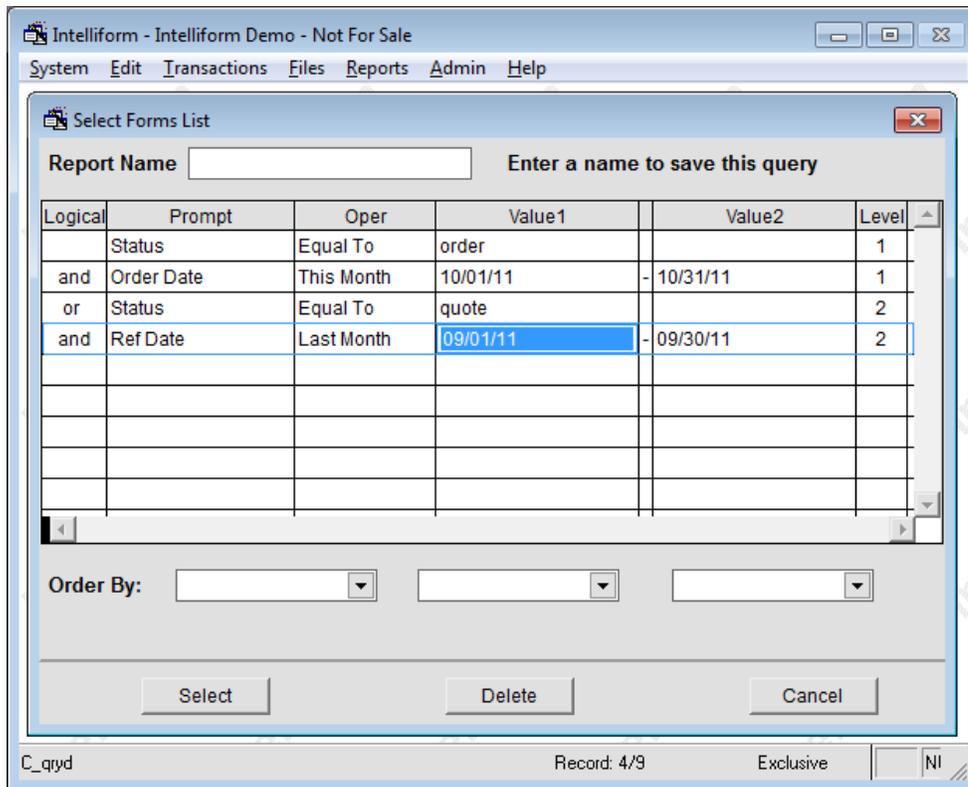
The other reports print out the indicated information and allow you to choose your own criteria. This can provide you with the answer to almost any question you might have about your business. Following are several samples of different types of reports that might be of interest to you. After working through the samples below and you will probably be able to create almost any report that you might be able to imagine on your own.

Many reports you will want to create will be done from the "Sales List". From the Main menu, select REPORTS-> SALES LIST. You will be presented with the following Dialog Box; open the dropdown list and you should see something like (if you haven't saved any selects yet, you will only see [New Select])



From the dropdown list, choose [New Select] and you will see the select dialog:

Note that if you have saved reports, they will be in this dropdown list and you can choose any reports that you have saved (Last Week Orders in above example). To delete or edit a saved report, click the Edit button.



It is from this dialog box that you will select the conditions to create your reports. All conditions for level 1 will be evaluated 1st, all for level 2 next, etc.

(level1 conditions) <logic2> (level2 conditions) <logic 3> (level3 conditions)

Where <logic2> is the logical condition starting level 2, <logic3> is the logical condition start level 3, etc For the above example, this would be:

(status=order and order date This Month) or (status=quote and Ref Date Last Month)

Which would be the orders placed this month or quotes last month that are not orders

NOTE: case does not matter and all character values mean “starting with” unless you choose oper “..Exactly..” If you fill in the Report Name, the report will be saved and the next time you want to run it, you would choose it as noted in previous figure. For saved reports that use dates (as above), you should use the non-specific operators like “Today”, “This Month”, etc instead of specific date like “Between” with dates. That way, you will not have to change the dates when you run it next time.

1. Outstanding Orders

Under PROMPT, click on the down arrow. Scroll down to "Status" and click on it so that it appears in the PROMPT field. (To reach any field quickly, type the first letter, in this case, “S”.) The next field to the right is the operator field. It will default to "Equal To". Under Value 1, type in the word "ORDER". You have now created a report that will give you all of your records that have a status of “Order”. To determine the sequence of the report, click on the down arrow to the right of ORDER BY. Now select "DATE". You can also, select a second and third sort criteria by choosing from the fields to the right of the first field. Now, click on "Select" at the bottom left of the window. You are now back at the “Sales List” Dialog Box. Determine where you wish your report to be sent and click on “Report”.

2. Open Orders by Sales Rep

On the 1st line, choose Status, Equal To, and type in ORDER. On the 2nd line choose Sales Rep, Equal To, and type in the name of a sales rep. It should be:

| Logical | Prompt | Operator | Value1 | Value2 | Level |
|------------------|------------|----------|--------|--------|-------|
| | Status | Equal To | order | | 1 |
| and | Sales Rep | Equal To | denny | | 1 |
| Order By: | Order Date | | | | |

3. Follow Up Report

Here's an excellent report to run when you want to follow up on re-orders. Whenever you enter an order for a customer, be sure to put a date in the follow up field (F/U field) when you anticipate a re-order on the product. You might wish to run this report at the beginning of each month to see which orders might be coming due.

| Logical | Prompt | Operator | Value1 | Value2 | Level |
|---------|----------|------------|---------|--------|-------|
| | F/U Date | This Month | <start> | <end> | 1 |

Where <start> and <end> indicate the current month start and end date

4. Unposted Orders

This is a good report to run before you post to QuickBooks, especially when you've first set up the connection and want to make sure everything is posting properly.

| Logical | Prompt | Operator | Value1 | Value2 | Level |
|---------|--------|----------|------------|--------|-------|
| | Posted | Equal To | N | | 1 |
| and | Status | Equal To | Invoice | | 2 |
| or | Status | Equal To | ML Invoice | | 2 |

5. Weekly Orders

| Logical | Prompt | Operator | Value1 | Value2 | Level |
|---------|------------|-----------|---------|--------|-------|
| | Order Date | This Week | <start> | <end> | 1 |

SET UP FOR MULTIPLE TAXING AUTHORITIES

Intelliform has a simplified method of addressing multiple taxing authorities, no matter how many different taxing authorities you might have. Every customer has a specific tax rate, which is the cumulative tax of the various taxing authorities. For example, if your customer is subject to only a State Sales Tax of 4%, then that customer's total tax is 4%. If another of your customers is subject to a State Sales Tax of 4%, and a County Sales Tax of 2%, then that customer's total tax is 6%. If still another customer is subject to a State Sales Tax of 4%, a County Sales Tax of 2% and a local Sales Tax of 1.5%, the total Tax for this particular customer is 7.5%. In this manner, you are able to charge the appropriate sales tax for each customer, no matter how many different taxing authorities you must collect taxes for. In the example above, there are three separate total taxes (4%, 6%, 7.5%). However, you can have an unlimited number of different total taxes depending upon the particular cumulative tax rate of your specific customers. In addition, there is one additional rate, 0%, for non-taxable customers (out-of-state or tax exempt. In this example, you now have a total of four different rates (4%, 6%, 7.5% and 0%).

At this point you should determine your total number of tax rates. Note that you should only create tax rates for different total rates, not for each customer.

A. To Set Up In QuickBooks:

For every customer tax rate, you must set up an item and vendor to connect to QuickBooks. In the sample above, we have four different tax rates, so we must have four different tax items and vendors in QuickBooks. You may have any number of different tax vendors depending upon your states particular requirements. In some states, there may be three different taxes, but all taxes are sent to one taxing authority, i.e., the state department of revenue. In other states, there may be three different taxes, but the taxes are sent directly to each tax entity. In the former example you might wish to have one tax vendor; in the later example, you need three tax vendors. It is our suggestion, however, that you set up as many different tax vendors as you have total tax rates. By doing so, the tax amounts for the various taxing agencies will be easier to separate in QuickBooks.

Note: You will need one pair (Item and Vendor) for each different sales tax you charge customers. You should NOT create tax groups as defined in QuickBooks.

B. To Set Up Multiple Tax Items and Vendors in QuickBooks.

1. Click on Lists from the Main Menu and then "Items".
2. When presented with the "Item List" dialog, click on "New" and enter the following:
Type: Sales Tax Item
Tax Name: The name of the tax, i.e., State, County or Local Tax or whatever combination of taxes are appropriate, for instance, "State, County and Local" or "State and County".
Description: Sales Tax
Rate: Enter the appropriate Sales Tax Rate. This rate would be the total rate that would be applicable to a particular customer. (For example, the rate would be 6% for a customer responsible for State and County Tax (4% and 2%) and the tax name would be "State and County".
Tax Agency: Enter the tax agency to which taxes are paid. (In QuickBooks, the tax agency is a "vendor". If you have not created a tax agency in QuickBooks, you will receive a message saying that the vendor does not exist and asking you to create one. You will then enter the information appropriate to the taxing agency, i.e., PA Department of Revenue.)
3. Repeat the above procedure for each tax entity to which you will pay taxes. For example, State, County and Local.

In our example, the items and vendors would be:

| Item (Tax Name) | Rate | Vendor (Tax Agency) |
|-----------------------|------|--------------------------|
| State Tax | 4% | PA Department of Revenue |
| State & County | 6% | State & County |
| State, Local & County | 7.5% | State, Local & County |
| Non Taxable | 0% | Non Taxable |

If the tax is a combination of tax agencies, the vendor name can be the same as the tax name.

4. Click OK to Save
5. Verify that the above information is correct in the Items List and then Press Escape to leave the Items List.

C. To Set Up In Intelliform

1. Click on Open, then Lists and then Sales Tax Items; the Sales Tax Dialog is now presented. Enter the item (Sales Tax), taxing authority to which you pay taxes, (i.e., PA Department of Revenue) and the tax rate (i.e., 7%).
2. Repeat the above procedure for every tax item and tax vendor that is required for your particular situation. Make sure that each sales tax item, vendor and sales tax rate is exactly the same as what you entered in QuickBooks.

Note: Either now or at a later time, you should enter your customer database, (if you have already entered customers) and enter the appropriate Sales Tax Item for each customer. If a customer is exempt from taxes (Non-Profit or Out of State) you should enter the correct Tax Item and Vendor and a rate of 0.

SECURITY AND USER RESTRICTIONS

There is no such thing as perfect security. All systems, including fingerprint, eye scan, card reader, encryption etc, can be broken.

Intelliform security is based on user passwords. Passwords are the simplest type of security. Many computer experts can easily break most password schemes. However, the password scheme in Intelliform does insure that the person bypassing it has to be deliberately doing so. Therefore, if it does happen, you know that the person or persons doing it can not claim it was careless or by accident.

However, the password scheme does not have to be broken for the system to be compromised. The most common security breach is people using easily guessed passwords, or leaving the written passwords lying around for anyone to see, or one person giving their password to another due to illness, out of office, etc. It is your responsibility to see that these types of things do not happen.

The only reason to use passwords is to restrict what some users can do or see in Intelliform. If you don't need to do this, don't use passwords. If all you need is to restrict who can run Intelliform, see below for Network and Other Users.

There are 2 types of user restrictions; Menu Restrictions and Sales Rep Restrictions. If you are going to use passwords at all, you must use Menu Restrictions to create at least 2 groups and only allow one group to have rights to Users and Groups; otherwise, anyone could goto Admin -> Users or Groups and change them.

To input or change a user's password, goto Admin -> Users, edit the User you want, and type the new password in; after you leave the field, the password changes to the encrypted text. You can also blank out the Password field to remove the password entirely (you may need to do this if the user forgot their password)

Users can change their passwords by System -> Change Password. If you use passwords, it is a good idea to have each user change their password periodically. To do this, goto Admin -> Setup and set the "Advise password change" to the value you want. Each user will then be reminded to change their password.

Menu Restrictions: Groups and Rights

You can restrict what menu choices your users can do by assigning them to groups. Each group is going to have a set of permissions and restrictions and all users in that group will have that set of permissions and restrictions. To do this, follow these steps.

1. Decide on how many groups you need; for example, you could have 2 groups, "Admin" and "Sales" where Admin is going to have full rights and Sales is going to have restricted rights (many businesses will not need more than 2 groups like this) or you could have a third group "Managers" that have Report rights and/or Backup Restore Fix where Sales does not.

2. goto Admin -> Groups and Add both groups

3. The grid column Menu Choice lists all the Menu choices; for example, Admin refers the entire Admin menu choice, Admin:Backup refers to the Backup choice under the Admin menu choice, etc

4. Menu Rights refers to the rights that this group has for all the menu choices; the rights are:

Write = complete read, write, lookup rights

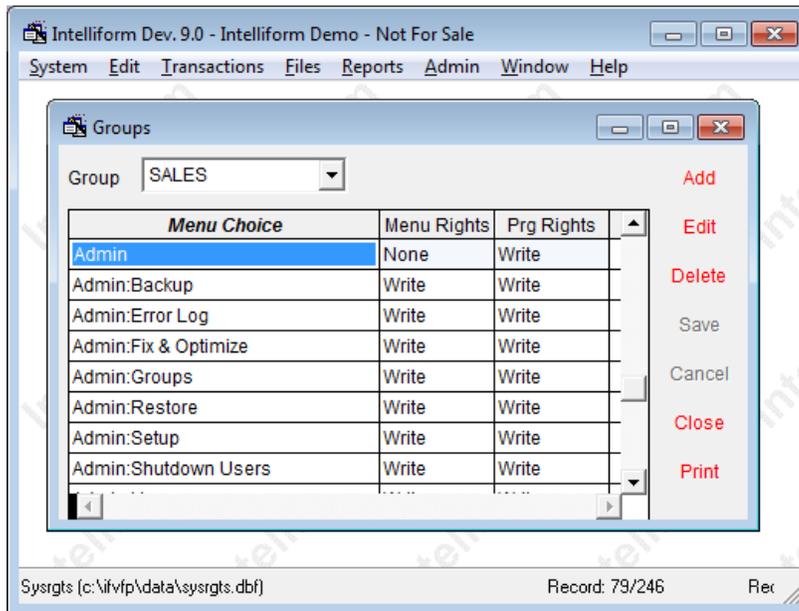
Read = read only (can look at but cannot change)

Lookup = can lookup in selecting only

None = can do none of the above

5. Prg Rights are not used; they are reserved for Custom Program use.

6. Select the Sales; you should see the following:



7. In this example, the Sales group has been given “None” rights for the Admin menu; this means that none of the Admin menu choices are available for all users in the group (this would be a fairly normal choice for all but the Admin group)
8. Select any other value from the Menu Choice column and assign the rights you want; e.g. for Reports:Statements you may wish to give “None” rights to the Sales group also.
9. When finished assigning rights, close the Groups dialog
10. goto Admin -> Users
11. assign each user to one of your Groups.

NOTE: there are 2 important rules here

1. At least one group must have full Admin rights (no restrictions) and at least one user must be in that group or else you cannot do anything here again !!
2. The Admin user cannot “forget” their password; if you do, **THERE IS NO WAY YOU CAN RECOVER IT !!** If a Sales Group user forgets their password, an Admin user can assign a new one for them.

Sale Rep Restrictions

Sales Rep restrictions do not restrict the users in the use of any menu choice. Instead, it restricts the information they see in Transactions or Customers or Customer Reports to only those customers having that sales rep **or a blank sales rep**. A blank sales rep allows you to have one customer serviced by more than one sales rep; each would only see their transactions.

To do this, goto Admin -> Users and select the sales rep you want this user restricted to under the column Restrict To.

You can, of course, use both type of restrictions, Menu and Sales Rep, at the same time.

Networks and Other Users

If you have other users that you do not want to have any access to Intelliform, you can restrict access to the directory to only the users you want by using the security restrictions in Windows. Please refer to Windows for doing this.

CRASHES, BACK UPS AND COMMON PROBLEMS

System Crashes

A system crash occurs when your computer “locks up” and you can no longer perform any functions, requiring you to re-boot your machine. There are many reasons you could experience a crash such as a power failure, a power surge, a Windows malfunction, a problem with another program running in the background, etc. At this point in time, there is no way to guarantee that your computer will never crash. And unfortunately, computer crashes occasionally result in corrupted data.

Fix and Optimize

Most of the time, a system crash will not corrupt data. However, if your data is corrupted, Intelliform includes a highly sophisticated tool that is designed to repair your data files. This tool is the Fix & Optimize feature that is available on the Admin Menu. The Fix & Optimize feature will correct corrupted data about 90% of the time. To use this feature, from the Main Menu, click on ADMIN, FIX & OPTIMIZE. The fix routine will repair your corrupted data files *most* of the time.

If you are unable to open Intelliform due to a system crash, you will not be able to access the Fix & Optimize option within the program. In this case, you can run the Fix and Optimize routine from outside the program by performing the following steps:

1. Right click on the Intelliform Icon on your desktop and choose PROPERTIES.
2. Go to the end of the Target Line and type three keystrokes: _ /F (that is, type a space, a forward slash (/), and the letter F).
e.g. the default target line would now read: C:\APPS\IFORM\IFORM.EXE /F
3. Click OK.
4. Now start Intelliform. Fix & Optimize will now run.
5. After you've run Fix & Optimize, go back to the Target Line and remove _ /F (that is, delete the space, the forward slash (/), and the letter F).

Back Ups

Windows has a built in backup utility that can be used to backup anything, including Intelliform data and program. Please see Windows Help to use this utility

If you do not use the Windows backup utility, you can use the backup routine in Intelliform, which is quick and easy to perform. Simply click on ADMIN from the Main Menu and then BACK UP. Follow the directions on your screen. Likewise, to restore your data, click on ADMIN, then RESTORE.

About 10% of the time you have corrupted data files, Fix & Optimize will be unable to repair and recover your Intelliform files. That is when you will need your back ups. While many people do not make back ups of much of their work, we strongly recommend that you back up your Intelliform data. It is one thing to lose a word processing file that is merely inconvenient to re-create. It is another matter entirely when you have corrupted data files that result in the operation of your entire business being at a standstill. That potential exists whenever you have a system crash that results in the corruption of your Intelliform data. *It is your responsibility to back up your data.* Since system crashes are an all too frequent occurrence, the probability is high that at some point in your business career you will need those back ups.

There are two Intelliform directories, the program directory and the data directory. The files in the program directory can easily be restored by re-installing Intelliform. It is the files in the data directory that should be backed up on a regular basis.

For an alternate method to backup both your data and program, please see the instructions at the end of this section

The Program Directory

When you install Intelliform, the program files will be loaded into C:\APPS\IFORM unless you specify another default during installation. The program directory holds only the Intelliform program files. If you suspect that these program files have become corrupted, you can simply re-install Intelliform. The setup program will re-install any corrupted program files without disturbing any of your data files.

The Data Directory

Beneath the program directory is the data directory that contains all of your company's data. Unless you specified another default during installation, this directory is known as C:\APPS\IFORM\DATA. When making backups, you must back up the information in this data directory.

If You Have Not Made Backups

If, despite our admonitions, exhortations and dire warnings, you find yourself with corrupted data files and no back ups, you have the following options:

1. Delete your Intelliform data from your computer and start over. This will mean losing all of your data. (It will also mean holding your head in your hands and moaning repeatedly, "Why me?")
2. Contact a Data Recovery company in your area. These companies will attempt to recover your data directly from your hard drive. They are very good ...and *very expensive*. However, they represent your best chance for recovering data. (Recommended)
3. Send us your data and we will attempt to recover it for you. However, we do not anticipate recovering much more data than the internal Fix & Optimize routine can recover. Our charge for data recovery is approximately \$125.00 to \$200.00 depending on the complexity and time required. Our charge will apply regardless of the amount of data recovered.

Other Ways to Protect Your Data

1. Run Fix & Optimize on a regular basis (at least once a month) even if no error has occurred. This function reorganizes your data and increases performance.
2. Run the Windows diagnostic programs at least once a month to repair any problems with your hard drive.
3. Delete any temporary files that are left over by Windows programs at least once a week. These will almost certainly be in your TEMP directory.

QuickBooks Connection Problems

Every problem with the connection to QuickBooks is a setup problem. Therefore, the first step you should take is to review the section Connecting to QuickBooks and verify that you have done everything exactly as instructed, step-by-step. Unfortunately, the setup problems are not easily identified because QuickBooks, when importing, simply says there was an error, without identifying the specific problem. Hopefully, QuickBooks will correct this shortcoming in the future. Until then, here is a list of the most common setup problems.

1. **Incorrect Tax setup.** Every Sales Tax Item in Intelliform (under Lists) has an Item (e.g. Sales Tax) and a Vendor (e.g. PA Dept of Revenue). For each of these, there must be a matching Sales Tax Item in QuickBooks (i.e. an item of type Sales Tax Item) and the Sales Tax Item in QuickBooks must have a **Vendor**. In QuickBooks, the Vendor is not displayed in the Items List; you must Edit the item and verify that it has a Vendor. Note that the Vendor is called **Tax Agency**, even though it is really a Vendor. Of

course the Sales Tax Item and Vendor must be exactly the same in both Intelliform and QuickBooks (the Description in QuickBooks has nothing to do with this, and can be anything).

2. **Duplicate Name.** This is one of the few times QuickBooks tells you what is wrong (sort of). The message from QuickBooks will be “You can’t change the type of a name or add a duplicate name” when you import. If you use customer and vendor Types, they must be exactly the same in both Intelliform and QuickBooks (unless really necessary, we don’t recommend using types because they are time consuming to use and QuickBooks is very unforgiving in using them). However, the problem is usually “Duplicate Names”, not “Types”. In QuickBooks, names are kept in four places, Customers, Vendors, Employees, and Other. **None of these names can be duplicates.** This means that you cannot have both a customer and vendor by the same name (you can get around this by adding or removing a period in one of the names). Also, if you made a mistake in the setup, tried to post, and then corrected the problems, it still might not work, with this message. The reason may be that in the original problem, QuickBooks may have created a name in Other Names and now won’t let you post correctly. The solution is to check Other Names in QuickBooks and **delete them.**
3. **Undeposited Funds.** If you did not let QuickBooks create this account automatically, the posting cannot work. You can check for this by:
 - A. Create an invoice in QuickBooks and save it (you can delete it later)
 - B. Check the Chart of Accounts in QuickBooks. There should be an account titled, “Undeposited Funds”.
 - C. If there are **two** Undeposited Funds accounts, one will have an asterisk “ * ” in front of it (i.e. “*Undeposited Funds”) and one will not (i.e. “Undeposited Funds”). Delete the one *without* the asterisk. You now want to remove the asterisk from the remaining “*Undeposited Funds”. To do this, highlight “*Undeposited Funds”, click on EDIT from the Main menu, and then Edit Account. Remove the *.

Posting To QuickBooks Problems

Double Entries: If you discover duplicate information in QuickBooks, the user forgetting to first Post in Intelliform has caused it. By forgetting to first post in Intelliform, the transfer file that was created previously remains the same (it is not overwritten). Therefore, when you import into QuickBooks, you are simply posting the old information a second time.

Data from partial templates not posting: If the information from a partial template did not post, chances are you did not enter a ship date into the partials. Enter a ship date in the appropriate template and re-post.

Network Problems

If you experience a problem running Intelliform on your network while your other programs are functioning properly, it is natural to assume that the problem is with Intelliform. However, that is not likely to be the case. Instead, you probably need an adjustment to your network. Here’s why: Intelliform is a multi-user, network database program and therefore requires that the network be set up correctly for multiple, simultaneous access. A network can be set up incorrectly in many ways and still function satisfactorily for document centered programs such as word processing, spreadsheets, or for single user database programs such as Act, MSWorks, QuickBooks, etc. Networks are quite complex and in order for Intelliform (or any other program of its type) to work properly, your network must be set up correctly. Networks that have been set up incorrectly have created an industry wide support problem for virtually every software company. In fact, Microsoft currently charges over \$300 per incident for all network questions, *including installation.* To date, we have not encountered a *single* network problem where Intelliform has been the cause of the difficulty. Some of the network problems that have resulted in difficulty running Intelliform have been: incorrect configurations, incorrect setup, share conflicts, file conflicts, directory conflicts, missing or incorrect drivers, corrupt or bad drivers, dll conflicts, etc.

We have gone to considerable length to make our network installation as simple and foolproof as possible. In order to reduce the likelihood of having a problem, you should:

1. Follow the Network Installation Instructions **exactly**. (If you do not understand the network instructions, you should consult someone who does. For someone who understands networks, our instructions are *very* simple.)
2. Make sure you have a network specialist available, in case of difficulty. **If you are running Intelliform on a network and experience a problem that is not addressed in this manual, you should call your network specialist.**

Email Problems

If you experience a problem emailing from Intelliform, follow these steps.

1. Make sure you can email from your email client. If you are unable to email independently of Intelliform, the problem is somewhere in your email client or Windows
2. Make sure you can email from Microsoft Word or Excel or another Microsoft product. If this does not work, you may need to reinstall your email client AND install Microsoft IE 5 or higher (even if you don't use IE as your browser) and reinstall other Microsoft products. If you can't email from these products, neither can we.
3. Make sure your email client is MAPI compliant. Microsoft Outlook, Outlook Express, Windows Mail, and Windows Live Mail are but some others are not.
4. If you are getting a MAPI error message, please see the Error Messages section at the end of this manual.

Alternate Backup Method

As an alternate to the Windows backup utility or the built in data backup of Intelliform, you can make a backup of the entire Intelliform Program Directory to a CD or flash drive. This allows you to save both the program and data at a point in time.

The great thing about this method is that you can run this backup at any time! For example, you use this method of making a backup at the end of every year on 12/31 or 1/1 and then, at any future date, you can insert the disk and run Intelliform as though it was that date, **no matter what program or data changes have occurred since then**. In addition, this makes an excellent backup in case of any disaster such as a crash, fire, stolen etc.

You run the backup by merely inserting the CD or flash drive and making a shortcut icon to run it from it, or you could copy to a **different** directory on your hard drive, make a shortcut icon to run it from there (faster); **be careful to not copy it over your current data or you will lose your current data.**

For example, you could make a backup at the end of each year for archive purposes or you could make a backup at any time to transfer to your laptop or home computer to be able to look at off site

Single User:

Simply copy the program directory (with all sub directories) to a CD (make sure you are not running Intelliform at the time).

Multi User/Network:

You can do just as the Single User above after insuring that no one is using the system or you can use the Windows Scripting to backup your data and programs by copying them to another directory. Windows Scripting must be enabled to do this (this should be true unless you disabled in Windows). You can then use Windows Task Scheduler to schedule it to run automatically.

An example script file is in the UTIL directory under your program directory

ADDITIONAL INFORMATION

Manuals

You can access the manual from Help -> Manual or you may download the latest manual by going to our website at www.intelliform.net.

Billing

Monthly Billing: Your account will be automatically billed on the first of each month. Your credit card statement is your receipt.

Annual Billing: If you wish to be billed annually, please let us know and we will be glad to do so. Annual invoices are sent out on December 1st for the following year.

Cancellations

You may cancel Intelliform at any time. The cancellation is effective on the day it is received. Monthly charges are not prorated and we do not issue credits for partial months of usage. If you have elected to pay annually for Intelliform and subsequently decide to cancel, any unused portion of the rental charge will be refunded within ten working days.

Changing your company name and other information

Your company name and address are encoded into the program for our software protection. To have your company name or address changed, please email us your new name or address and we will update your license,. To change a sales rep name, phone or fax numbers, you can click on ADMIN, SETUP and make the change yourself on the General Tab.

To add or remove the number of sales reps for billing purposes, please notify us. All billing changes go into effect on the first day of the month. Partial months are not prorated.

Changing the Number of Sales Reps

To change the number of sales reps or users, simply notify Intelliform and we will update your license. Billing changes are effective on the first of the month. Partial months are not prorated.

Compatibility

Intelliform is designed to operate on the Microsoft Windows operating systems and in conjunction with the latest versions of QuickBooks. Should Windows or QuickBooks modify their programs, Intelliform will modify its software to ensure continued compatibility. Intelliform will do so at no charge to the customer. However, should it be necessary for Intelliform to make modifications to effect compatibility with the latest versions of these programs, it may become necessary for the customer to upgrade to the latest version of Windows or QuickBooks. Intelliform will not create multiple versions of its software to be compatible with multiple versions of the above programs.

Late Charges

A late charge of \$25.00 will be assessed for any accounts greater than 15 days overdue.

Replacement CD's

To receive a Replacement CD, notify Intelliform. The replacement charge is \$10.00.

Technical Support

If you have difficulty installing Intelliform on your computer, we will be glad to assist you. Normally, there is no charge for this service. Any technical support by phone, beyond the initial installation, will be charged at \$3.00 per minute with a minimum charge of \$50.00, billed to MasterCard or Visa.

Technical support by email is free; email to techsupport@intelliform.net

Please note that most questions or problems can usually be resolved by referring to the appropriate section of this manual. **Intelliform's technical support is limited to specific questions regarding the operation of Intelliform.** If you should have questions about how to perform Windows functions (i.e., creating shortcuts on the desk top, changing display settings, copying files, etc.), you should consult the HELP of Windows or call Microsoft. Similarly, for questions regarding the operation of QuickBooks, you should refer to the appropriate reference guide or contact Intuit directly.

Utilities

We include a number of useful utilities in the Util directory under the program directory. We do not support these.

Working away from office

There are a number of ways to work away from the office. Here we assume your office computer runs Intelliform, either stand alone single user or over the office LAN and you have a pc that you want to connect from when away from office. Technically, in some instances, you can use a smartphone or other device instead of a pc but they are not suited to running Intelliform. All these methods (except Method 4) require an internet connection between the computers and allow others on the office network to continue to use Intelliform.

Method 1: Remote connection using a free 3rd party application like TeamViewer, AeroAdmin, UltraVNC, etc. This is by far the simplest method and the one we recommend. They usually allow only one connection at a time to your office computer. Note that you may prefer method 4 if you are the only user of Intelliform and you do not want to depend on the internet being available.

Method 2: Remote Desktop

The office computer and your laptop run the Remote Desktop application. Windows has a built in program to do this that you have to setup. You can also set this up for multiple connections and NLA security and use a VPN for additional security. This is your most secure method but is also complicated and not recommended for most users.

Method 3: VPN network access

This method uses a VPN that allows your remote pc to be setup as a network node on your office network. This method is NOT recommended as it will transfer the data as well as the screen and keyboard data and will be much slower.

Method 4: Copy and Paste

This method does not need an internet connection and is essentially for a single user of Intelliform. Intelliform would be installed locally on the laptop. When you leave the office you would update the laptop local version to the latest (if necessary), and then transfer the data to the laptop by Admin->Backup on the office computer and Admin->Restore on the laptop. When you return you do the reverse; Backup on the laptop and Restore on the office computer.

CUSTOMIZATION

Customer and Vendor Status

You can add additional Status values by choosing Files -> Lists -> Customer Status or Vendor Status. For example, you could add the status “Prospects” to the Customer Status list. This can be very useful to be able to quickly view the Prospects in your Customer file. Or you could send an email to all of them under Reports -> Customer Email.

Customer and Vendor Types

You do this by choosing Files -> Lists -> Customer (Vendor) Types. These are primarily used for Quickbooks and we do not recommend them (see Connecting to Quickbooks).

User Defined Product Types

You do this by choosing Files -> Lists -> Product Types. This allows you to define additional “types” for Forms or Multi Items. For example, you could define “Business Cards” as a separate type; then after you added a standard form (eg “Other”), you would change the Type to “Business Cards” . It would still have the basic specification layout as “Other”, but you could then quickly distinguish between them. If you are connected to QuickBooks, this also allows you to further define specific sales and COS categories. You should also goto Admin->Setup and setup the accounts you want.

Pay Methods

You do this by choosing Files -> Lists -> Pay Methods. Here you can define additional Receipt type; the defaults are Check and Credit Card.

User defined fields for Customers

You can name and use up to 16 user defined fields for your customers. You do this by choosing Files -> Lists -> User Defined Fields. Every one you give a Field Name to will appear on the last page of the Customer data when you edit it.

These fields also appear on the customer grid and can be searched and filtered.

These fields also appear when you use Select on any report where you can select customer data.

User Defined Reports

You can create User Defined report fields for Customers, Vendors, Forms, Multi-Line invoices, and Multiple Items.

Custom Programs and Reports

Intelliform’s unique Select functions allow you to quickly and easily retrieve any information you wish.

However, if you need a Special Report or Special Program that Intelliform does not provide, you can contact us to develop one for you.

The charge for this will vary depending on how complex it is.

Frequently Asked Questions

Q. We have a 2 user (or more) license but we still cannot both access the program at the same time.

A. You probably have not set up more than 1 user. Under Admin, add the number of users you need.

Q. We have a new Sales Rep and the program will not allow us to add them.

A. The number of active sales reps allowed is determined by your license agreement. For example, if you have licensed 3 sales reps and you currently have 3 active sales reps and you wish to add another, then you have to either make one of the existing reps Inactive or increase your license to 4 sales reps.

Q. I have a commission percentage in my Sales Rep file but it does not appear in a Transaction when I use a customer with that Sales Rep.

A. The commission rate in the Sales Rep file is only the default Sales Rep commission. Whenever you add a Sales Rep to a Customer, the commission rate is set to the Sales Rep's default commission rate but it can be changed for each customer. You probably blanked it out or added the commission % to the Sales Rep file *after* assigning that Sales Rep to the customer.

Q. Some of my customer balances are incorrect and I am unable to change them.

A. You are unable to change the customer A/R or Credit balances because the system corrects any imbalances due to system crashes or other problem when you run Fix and Optimize. You must manually enter the appropriate invoices, receipts, or memos to reflect the correct customer balance. If you are just starting and do not want to enter all the old invoices, you can simply enter a Debit Memo or a Receipt Credit for the correct starting balance and label it Start Up Balance.

If you need to enter transactions to adjust customer balances and you are connected to QuickBooks and you do NOT want the transactions to go to QB, then follow this procedure:

1. Make sure everything is posted to QB
2. Put in the transactions you need to balance customer accounts. For example, if you need to cancel AR for old invoices, you should put in an old Receipt and "pay off" the old invoices.
3. Post to QB
4. Do NOT import into QB
5. The next time you post to QB, it will overwrite the transfer file and all should be OK

Q. Some of my contacts do not show up in the customer grid.

A. The customer grid only shows the 1st contact. Use the Contact Grid (Files->Contacts) to show all contacts.

Q. My Sales Tax rates have changed; how do I change them in Intelliform.

A. If you are connected to QuickBooks, then open Files->Lists->Sales Tax Items and change the rates or add rates as required. If you change rates then you need do nothing else as all customers who use that rate will automatically use the new rate for all new orders. If you have added a sales tax item and rate, then you need to change any customers affected and change QuickBooks as appropriate (see the section in the Manual)

If you are NOT connected to QuickBooks, then change the default rate in Admin->Setup. When you save the change, you are asked if you want to automatically change all customers that used the old rate to the new rate.

If there are some customers that will use the new rate and some that will not, then you will have to change the affected customers one at a time.

Q. Freight is taxable in some areas but not others. How do I handle this ?

A. Edit each customer that is affected and check the Freight Taxable under Additional Info.

Q. The Reference # is all messed up; how do I correct it ?

A. The Reference # default is setup to be YYMMDD-001, ...-002, etc (e.g. the 1st transaction on 2/7/2008 would be 080207-001, the 2nd would be 080207-002, etc). However, you can change it to anything you want and the system will try keep what you changed it to; e.g. if you change it to AB12345 then all subsequent transactions would be AB123456, AB 123457, etc. To restore to the default, simply change the next transaction to what the default would be.

Q. I don't understand how the Preferences under the System menu work

A. "Save Preferences" saves the settings you have set up for all the open grids on the screen (see Preferences under Procedures in this manual).

"Restore Preferences" restores your last saved preferences for the open grids.

"Restore Defaults" restores the system default settings for the open grids. Note that this does not clear your saved preferences.

"Clear Preferences" clears all your saved preferences, open or not (and can be run even if you can't see any thing by "Alt +F3")

Q. How do I handle inventory ?

A. Intelliform does not include inventory or warehousing; however, one way of handling buying stock for multiple customers would be:

1. Purchase of Stock: Create a Customer named "Stock In" (you) and buy the product with "Stock In" as the customer with no margin at all.
2. Sell to Customers: Create a Vendor named "Stock Out" and sell to your customer with Stock Out as the vendor with 0 cost and print an Avery label for shipping and enclose an invoice as a packing slip.

Q. When I put in a margin the price the computer shows appears wrong. For example, if the cost is 1000 and I put in 20% margin, the computer puts the price at 1250, not 1200. Isn't this wrong ?

A. You probably are confusing the difference between markup and margin. Markup is a % of the cost while Margin is a % of price. In your example, your profit Margin is 20% since 20% of 1250 is 250.

Q. The "Partials" are great for multiple vendors on a job but how do I know the total margin ?

A. When you edit a "Master" form, a new [+ Partials] button will appear in the totals area. This button will switch between showing the total cost/margin for the master form only and the total cost/margin for the master + all the partials.

Q. The Multiple Item template is great for Ad Specialties but many of the line items are exactly the same except for XL, SM, etc. Is there any way to save retyping them repeatedly?

A. Yes. When you are positioned on a new line, press Ctrl-D (hold the Ctrl key down and press D). If you are on the Qty Order column and nothing else has been entered, this will copy the Entire Previous Line; otherwise it will copy only the previous column. By the way, this also works the same way on the parts grid of forms.

Q. When I add a vendor, the terms default to Net 10. How do I change the default to Net 30?

A. The default terms for Vendors is the first terms line in the File->Lists->Terms menu item. Simply make the first line the one you wish to have as your default.

Q. Why can't I print RFQ's, Purchase Orders, Customer Quotes, or Customer Acknowledgements on Pre Printed Forms ?

A. The answer depends on the form being printed.

For File Copy, RFQ's, and Purchase Orders, you are not allowed to print on either Letterhead or Preprinted Forms. This is our form of copy protection which we have tried to make as non intrusive as possible (note that this only applies to in house copies or vendor print outs).

For Customer Quotes and Customer Acknowledgements, you can print on Letterhead always and on Preprinted Forms for Multiple Items (Preprinted Forms does not make sense for Forms since there are too many detail specifications).

For Customer Invoices, you can print on Letterhead or Preprinted Forms always.

Q. My state taxes Handling and I don't want the Invoice to read "Shipping & Handling"

A. Change the Invoice Freight Description in Admin->Setup->Defaults

Q. Exactly what contact name prints out on Bill To and Ship To ?

A. For "SHIP TO", if an alternate shipto address is used and shipto has a contact then that contact is printed otherwise the contact of the transaction is printed. For Multi-Line Invoices the Ship To refers to the ship to of the 1st form. As of version 11, the Ship To Attention is directly chosen by user on form.

For "BILL TO" of an INVOICE, if a contact on the Print Dialog is chosen then that contact is printed else if a Bill To contact exists then that contact is printed otherwise the contact of the transaction is printed

For "TO" of a Customer QUOTE or ACKNOWLEDGEMENT, if a contact on the Print Dialog is chosen then that contact is printed otherwise the contact of the transaction is printed

Q. How do I adjust where the "invoice note" under Admin->Setup prints.

A. Depending on how you have set the bottom margin, you can print anywhere from 4 to 6 lines for the "invoice note". Each line may be "empty" or "centered" by putting the appropriate number of space in.

Q. When I use 6 lines for the "invoice note" under Admin->Setup, the last line does not print on the invoice.

A. The number of lines that can actually be printed on the bottom of the invoice with the "invoice note" depends on the printer (called "unprintable areas"). We recommend using no more than 4 lines.

However, if you wish, you can adjust the bottom margin to allow more lines to print (but you will probably have to design your own art work for preprinted forms).

Q. It's great that all 3 invoice types now print on the same invoice form, but the totals on the bottom print too low and do not match your art work (or the top does not match)

A. Every laser printer has an “unprintable” area at the top and bottom of the page where the printer mechanism (may) grab the paper. This area can be anywhere from 0” to ½ “. Our printouts are designed to work with the “standard” HP laserjet III assumptions about these areas. Any printer designed to be compatible with this (most laser, ink jet, and thermal printers) will work fine. Some printers (and most dot matrix printers) do not conform to these standards. To fix this, you can adjust both the top and bottom margins under Admin->Setup. If the margin settings do not result in any changes to the printout, then you probably set your printer to “fit to page” or some similar setting; don’t do this.

Q. I have 2 different companies that I use Intelliform for (and 2 licenses) on the same computer and every time I install an upgrade, the program Icons get screwed up.

A. Intelliform’s default behavior is to create an Icon named “Intelliform”. Every time you install an upgrade it changes the “Intelliform” icon to reflect the last install you ran. To solve your problem, change the name of each Icon to something other than “Intelliform”. Then the install/upgrade program will not change them.

Q. Can I look at data from long ago that I backed up, say a year or more ago, even though I have deleted it since then ?

A. Yes. Please see the Alternate Backup Method.

Q. If I cancel the program, how do I get my data?

A. All Intelliform data is saved in standard DBF format under the data directory. You can use any one of many programs that understand that format to view and retrieve the data. If you don’t know how to do this, you can hire a programmer to do it for you.

Q. How do I remove Intelliform ?

A. Intelliform can be removed from the control panel “Add/Remove Programs”.

Error Messages

Q. When I try to email or fax from Intelliform, I get the error “Postscript Printer not found” or “Fax Printer not found”

A. Please refer to the manual section Setting up Email and Fax Capability. The printers you defined under Admin when setting up email and fax must be set up as local printers on every computer on the network and must be exactly the same.

Q. Email fails with message “...GhostScript Error 259...” or similar

A. This is probably because the printer chosen in Admin -> Setup does not exist on your system or is not a postscript printer.

Q. Email fails with message “...MAPI could not be loaded...”

A. Right click the Intelliform icon and choose “Run as Administrator”. Assuming it works, you can then run normally in the future. If it doesn’t work, please contact Intelliform support.

Q. The program starts with a message that includes “...invalid path or file name...” or with a message that includes “...NTVDM...”

A. You may have a corrupted program file. Download and install the latest program from our web site www.intelliform.net

Q. The program starts with a message “System is Read Only” and does not work

A. Intelliform is reporting that the System files are marked Read Only. You probably restored the data from a CD. To fix this, make sure all files in the Data directory are not marked read only (see Windows Help).

Q. The program starts with a message “System is Currently Shutdown” and does not work

A. This is VERY unusual but it could happen if you are running Fix and Optimize and your computer crashes while this is being run (e.g. power failure, etc.) To fix this, remove the file SHUTDOWN and/or the file FMDOWN from the data directory.

Q. We have a multi user license and sometimes when we have all users inputting data we get corrupt data or index.

A. You probably have a Windows locking problem. Please see LOCKING.RTF in the Intelliform docs folder.

Q. You occasionally get a “...Delayed Write Failure...”

A. You need to disable write caching; see LOCKING.RTF in the Intelliform docs folder.