

What's New in Version 3.03

Version 3.03 was released on 22 March 2011.

It is available for download from www.estimac.com or www.estipc.com.

Install over your previous version. All your projects, data and settings will be preserved. For full installation instructions, please see [How To Install EstiPC](#) or [How To Install EstiMac](#).

So what's new...

Purchasing from Reports

Supplier: Not Purchased Purchased

Grid	Qty	Description For Client
Hall	1	Mirror – discuss with client
Living	1	To cut and make one pair curtains, lined and interlined
Living	14	Interlining
Living	14	Lining
Living	1	2 seat Sofa, down and feather seat cushions, fixed back, with tapered mahogany legs and castors
Kitchen	1	Banquette 2.00 metres long
Kitchen	4	Kitchen chairs – discuss with client
Bed	1	To cut and make 1 pair of curtains blackout lined and interlined with <u>domette</u>
Bed	14.00	Fabric – wide beige on beige stripe

Client Report Exclude Images Exclude Prices Exclude Totals
 Supplier Enquiry Exclude Images

Add To New Order
 Add To Open Order
 Purchase Without Order
 For Selected Lines

Lines can now be purchased from the Purchasing and Codes Reports. Multiple lines can be purchased by first selecting multiple report lines.

Setting the 'Not Purchased' option on the Purchasing Report presents a list of all lines not yet purchased for one or all suppliers. You can then purchase some or all them from a single report page without having to move around different grids.

Just like purchasing from the grids, you can add lines to new orders or existing open orders. You can also purchase without order.

Using the Codes Report allows you to purchase some or all of the lines for a particular product category code or status code.

Itemised Invoicing from Reports

Not Invoiced Not Fully Invoiced Invoiced Fully Invoiced

Grid	Ref	Qty	Unit	Description For Client
Hall		1		Mirror – discuss with client
Hall		2		Wall lights
Hall		1		Delivery
Living		1		Curtains – Red and White <u>Toile</u>
Living		1		One 2" diameter mahogany pole with rings, ball end finials and brass brackets
Living		1		2 seat Sofa, down and feather seat cushions, fixed back, with tapered mahogany legs and castors
Living		15.00	metres	Fabric – cream chenille

Client Report Exclude Images Exclude Prices Exclude Totals

Add To New Invoice
 Add To Open Invoice
 For Selected Lines

Lines can now be invoiced from the Invoicing and Codes Reports. Multiple lines can be invoiced by first selecting multiple report lines.

Setting the 'Not Fully Invoiced' option on the Invoicing Report presents a list of all lines not yet fully invoiced to your client. You can then invoice some or all them from a single report page without having to move around different grids.

Using the Codes Report allows you to invoice some or all of the lines for a particular product category code or status code.

Add To New Invoice, either from the reports or the grids, now includes a check for previously used invoice numbers.

Itemised Invoicing of Fees, Extras and Delivery Charges

Grid Fees, Project Fees, Extras and Delivery Charges are now included at the bottom of the Invoicing Report. From the report they can be added to Itemised Client Invoices. They can be fully or partially invoiced, just like grid lines.

You can raise new invoices for fees, extras and deliveries if you want to keep them separate, or you can include them on invoices with grid lines.

Supplier Codes

One or more Codes can now be assigned to each Supplier.

Ref	Company Name	Codes	Address	Phone	Fax	Email	Web
Add New							
AAA	AAA Ltd						
ABB	Abbott & Boyd	F WAL	1/22 Chelsea Harbour Design Centre, Chelsea Harbour, London SW	020 7351 9985	020 7823 3127	→	→
ABR	Alton-Brooke	F FL WAL	2	020 7376 7008	020 7376 7009	→	→
ACRE	Acres Farm	FIR	Br	0118 974 4305	0118 974 4012	→	→
ALL	Robert Allen	C F FN	Ch Bu	01494 474 741	01494 603 400	→	→
ALT	Altfield	FN L	2/ xx	020 7351 5893	020 7376 5667	→	→
ALTF	Alternative Flooring	FL	3b	01264 335 111	01264 336 445	→	→
AMTI	Amtico International	FL TIL	So	0121 745 0800	0121 745 0896	→	→
ANTA	Anta Scotland	F FL FN L	Fe	01862 832 477	01862 832 616	→	→
ARCH	Architectural Heritage	FIR	Tagl	01386 584 414	01386 584 236	→	→
ARTH	Arthur Brett	BED FN	10	020 7730 7304	020 7730 7105	→	→
AST	Aston Matthews	BTH	14	020 7226 7220	020 7354 5951		→
B&FL	Beaumont & Fletcher	F FN L WAL	Th	020 7498 2642	020 7498 2644	→	→
BAK	GP & J Baker	F	6	01202 266 700	01202 266 701	→	→
BAUM	Création Baumann	C	Bu	020 7226 7748	020 7226 7753	→	→
BENF	Bennison Fabrics	F WAL	16 Holbein Place, London SW1W 8NL	020 7730 8076	020 7823 4997	→	→
BENN	Bennett Silks	F	Crown Royal Park, Higher Hillgate, Stockport SK1 3HB	0161 476 8600	0161 480 5385	→	→
RFRT	Henry Bertrand	F	52 Holmes Road, London NW5 3AR	020 7424 7000	020 7424 7001	→	→

Edit Existing Supplier

Ref: ABR

Company: Alton-Brooke

Codes:

- ACC Accessories
- BED Beds
- BTH Bathrooms, Fittings
- C Curtains, Blinds, Shutters

Account:

Address: 2-25 Chelsea Harbour Design Centre, Lots Road, London SW10 0XE

Phone: 020 7376 7008

Fax: 020 7376 7009

Email: sales@alton-brooke.co.uk

Web Site: www.alton-brooke.co.uk

The Supplier Data included in the EstiMac / EstiPC download has the codes preset. You can assign codes to your own additional suppliers.

As well as product category codes, you can set up and use specific codes for suppliers, such as 'Preferred Supplier' or 'Account Supplier'.

Faster Supplier Selection

Suppliers can be pre-selected by double-clicking on an empty Purchase column for a grid line. Suppliers are also selected when orders are raised, either from the grids or the reports. Both these selections are now significantly faster.

Select Supplier

(All Codes)

C (Line Codes)

ACC Accessories

BED Beds

Search: b

Ref Company

(Clear)

B&FL Beaumont & Fletcher

BAK GP & J Baker

BAUM Création Baumann

BEAUD Beaudesert

BELL Bella Figura

BENF Bennison Fabrics

BENN Bennett Silks

Cancel OK

The Select Supplier popup now features a Codes List. When a code is selected, only the suppliers assigned to that code are shown. You can quickly see, for example, just fabric suppliers or just furniture suppliers.

If you set one or more codes for a grid line before pre-selecting a supplier or raising a purchase order, then the Select Supplier popup initially shows just the suppliers for those codes. You can cancel this selection, if required, to see all the suppliers.

There's also a Search box that quickly reduces the listed suppliers to match what you type. If you type 'b', for example, you'll just see the suppliers whose references start with b. If you type 'be' the list of suppliers is further refined.

You can use the Company option to search for any part of the company name rather than the start of the reference.

Improved Client Statements



22 Badger's Mews, London SW6 2HH
contact@design.com

Mrs Hilary Tait
Mole Hall
Winchester

Mole Hall

Statement 25/02/2011

Date	Invoice		Amount	VAT	Total
06/01/2011	1020	Deposit Invoice	£5,000.00	20%	£6,000.00
28/01/2011	1035	50% of Hall, Living Room and Kitchen	£1,864.90	20%	£2,237.88
Invoice Totals			£6,864.90	£1,372.98	£8,237.88
Balance To Be Invoiced			£14,507.38		
Project Total			£21,372.28		

Date	Payment	Total
10/01/2011	Deposit Payment	£6,000.00
Total Received		£6,000.00
Balance Due		£2,237.88

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Client Statements now include a figure for 'Balance To Be Invoiced' and 'Project Total'.

As before, the client is shown what's been invoiced versus what they've paid.

Now they're also shown what's not yet been invoiced.

Charge Status included in Grid Purchase Column

	Qty	Unit	Description For Client	Purchase	Unit Cost
			Living Room		
	1		Curtains – Red and White Toile		
	1		To cut and make one pair curtains, lined and interlined		550.00
	14.00	metres	Fabric – Red and White Toile	330 FRE	33.00
	14.00	metres	Interlining		4.00
	14.00	metres	Lining		4.00
	1		One 2" diameter mahogany pole with rings, ball end finials and brass brackets	331 MCK	400.00

The Purchase column now shows the Charge Status to the right of the Order Number and Supplier Reference.

This lets you quickly see whether any charges have been recorded for a purchase and whether the purchase has been Closed.

Other Changes

- The full Charge Reference is now shown on the Purchase and Charges Report pages.
- Office Worksheets and Reports now show currency symbols and decimal separators.
- Grid References are now included on Supplier Enquiries.
- Various minor modifications and bug fixes.
For details see www.estimac.com/versions.shtml or www.estipc.com/versions.shtml