

SB Solutions Quick Reference Guide: 7/18/10

All Actions in this guide assume a starting point of the Main Menu.
All Bold items are the command buttons to click.

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I. PROGRAM SETUP/ADMINISTRATIVE

NOTE: Quick Reference Guide is still in DRAFT status, check www.mymemberdata.com for updates

a) LOG IN:

The file that opens the program is **C:\SBsolutions\SB.mde**. Open this file to load the log on form.

NOTE: You can create a shortcut to this file on the desktop

The default **User ID** is: Admin, type this in the user id field and press enter on your keyboard.

The default **Password** is: Super, type this in the password field and press enter, the Main Menu will load.

NOTE: Neither the user ID or password is case sensitive

After Logging in you can also go to **Org Info/Program Setup**, then check the box to Enable Auto Log In, this will provide a button off to the side of the Log On form that you click to immediately open the program with full rights. This feature should ONLY be used with a Single User on a Single PC configuration.

At the Main Menu, Contacts should be added first, you can use the **Add Contact/Member** Button to add contacts or you can click **Businesses** to add your business contacts (If a member be sure to click the Member checkbox for that contact). You can close when adding businesses is complete and repeat with individuals by click the **Individuals** button. Note with individuals you can also affiliate them with the Businesses entered.

Once you have your contacts entered, you can move on to the Setup Checklist, form the Main Menu, click the Org/Program Setup located in the upper right

b) SETUP:

Company Info; *enter the information for your organization*

Setup Checklist

Financial Ledgers-*Enter information for each Bank/Investment Account, Close* when done.

Account Setup, *Enter Accounts Desired. Close* when done.

Account Item Setup, *Enter Accounts Items (Sub Accounts) Desired. Close* when done.

Support Fees Setup, *Enter Annual Support Fees and Descriptions. Close* when done.

Customer Setup, *Enter Customer Info, Close* when done.

Employee User Setup, *Enter Employees/Volunteers and user name. Close* when done.

Contact Categories, *Enter Categories, Close* when done.

Invoice Message List, *Enter messages, Close* when done.

Inventory Setup, *Enter Inventory info, Click Add New for 2nd, etc. Close* when done

Equipment Setup, *Enter Equipment info, Click Add New for 2nd, etc. Close* when done.

Close to return to the Main Menu.

c) Data Backup:

The most important file in the program is SBData.mdb, this file should be copied to another media such as a flash drive, external hard drive, another computer or you can zip and email to someone. All other files can be replaced with no loss of data. For a single User program the location of this file will be C:\SBsolutions folder.

On the log on form is also an automated backup program to zip and upload your data file to PSTcorp's secure ftp server. In a network environment with multiple users, all users **MUST** be logged out of the program prior to doing a backup. Click **Exit**, **Open Backup Data Utility**, then Click **Backup Now**.

NOTE: There is a small annual fee to activate this feature, For Clients who utilize the autoweb update feature, this is included in that fee. Visit www.mymemberdata.com for current pricing.

d) Administrative:

Administration, A definition for each command is presented here

Change Log-*Enter information for each Design Change completed for the program (User Changes)*
Employee List, *for add/edit employees, set security, log training classes.*
Teams/Committees, *Add/Edit committees, assign members/contacts to the committee.*
Maintain Business Categories, *Define Categories for assignment to Members/Contacts.*
Maintain Business Types, *User defined for assignment to Members/Contacts*
Maintain Contact Categories, *User defined to assign to Member/Contact Communication Log*
Invoice Messages, *Enter Invoice messages that can be inserted into Invoices.*
Training Class Category, *Add/Edit Training Categories for assignment to Training Class List*
Training Class List, *Add/Edit any training classes taken by employees*
Users' Logged On, *View current users logged on, use before performing any program maintenance*
Maintain SIC Codes, *Some Standard Industry Codes (Can be ser as Business Categories).*
Task Types, *Define the task type for assignment when creating new tasks*
View Sales Reps, *Add/Edit Sales Reps for assignment to Members/Prospects*
Pay Commissions *Pay commissions to Sales Reps (Setup in Accounts).*
Paid Commissions, *View Paid Commissions to date.*
Excluded Commissions, *View calculated commissions that were excluded from payment*
Physical Locations, *Enter locations of equipment and facilities*
Software/Manuals List *Maintain a list/location and assignment for any type of media.*
Inventory Locations, *Enter locations where inventory items are kept.*
Maintain Projects, *Add/Edit projects, can also be assigned to tasks.*
Standard Job Tasks, *Maintain a list of Standard Jobs and duration (Used for Templates)*
Standard Labor Costs, *Maintain a list of Standard Labor Categories and Cost (Used for Templates)*
Fixed Assets, *Maintain a list of fixed assets and their costs (Used for Templates)*
Equipment Status *Equipment Status (broke, operational, etc.) for assignment to equipment.*
Get My Checks/Invoices *For loading your customized checks invoices after installation of an update.*

II. CONTACTS

a) Add Customer:

Add New Contact, Enter data (Click Customer checkbox to Yes), Close when done.

b) Add Business/Individual:

Master Contact List

Quick Add, Enter Contact Info, Be sure to select Contact Type. Close when done.

NOTE: You may also click details to enter other information

c) Add Individual to Business or Customer:

2 ways:

Master Contact list, Using Sort or Find (Cntrl-F), find and select the Individual Desired Details, In the affiliated to field, select the business or member to add individual as a contact. Close and Close to return to the main menu.

OR

Other, then Individual, then Show Results

Find the individual desired, then click Individual Detail

In the affiliated field, select the business or member to add individual as a contact
Close to return to the main menu

d) Search/View/Edit:

Search, Select a Category AND/OR enter a keyword
Show Results, Any matches to your criteria will then be displayed.
Detail, You may view or edit the information

OR For a General Search)

Search, then click General, Enter what you are looking for
Show Results, The Master Contact list will appear with any matching records. Matches will be found for Name, Address, City, State, Zip, Phone, and email

For example, entering Sam will find any records that have Sam in any of the fields mentioned above including any names with Sam or any Streets or Cities with Sam.

e) Information Sheet:

After Finding and selecting a member or non-member you can view an information sheet

Information Sheet, You may now print, email (Right Click and select Send To) or fax (if you have a fax program setup as an alternate printer), click Close to return to the Main Menu.

III. FINANCE

a) Create Job Templates

Maintain Templates, Enter a Category and Description for the Template

Material List, Enter Material required for the Job (Comes from Inventory), **Close** when done.

Labor List, Enter Labor required for the Job, **Close** when done

Fixed Asset, Enter any Assets required for the Job (Comes from Equipment), **Close** when done.

Task List, Enter Tasks Required and their Start Day (From Job Start), **Close** when done.

Close to return to the Main Menu

b) Create Estimates From Templates

Maintain Templates, Find and select the template desired

Create Estimate/Quote for Template Selected, Select a name for the Prospect, Click **Continue**.

Close to return to the Main Menu

NOTE: You can click View Open Estimates to do a variety of tasks, Print the selected estimate, Delete the Estimate, Flag estimates as a conversion (sale was made), close the estimate

c) Create Invoices From Estimates

Open Estimates, Find and select the estimate desired

Create Invoice for Selected Estimate, Enter Open Date and Date Due, Click **Continue**.

NOTE: Creating an Invoice from an Estimate will also automatically close the estimate and flag it as a conversion (sale was made)

You can also manually create an estimate from Open Estimates, print the estimate, delete the estimate, close the estimate

Close to return to the Main Menu

d) Add Invoice:

Finance,

Add/Edit Invoice, Select Customer Name, then enter items and amounts. **Close** when done.

e) Auto Invoicing:

Finance, Then enter the number of days forward, Any member with a due date less than the date calculated for invoices set to repeat (ideal for annual support that is billed monthly) will automatically have an invoice created based on the invoice flagged to repeat

f) Print Invoice(s):

There are 2 ways to print invoices: **Single or Batch**

Single:

Finance

Open/Closed Invoices, Find and select the invoice desired.

Print Selected Invoice, Select a message to display on the invoice (default is none)

OK, The invoice will appear in a preview mode, click **Print** on the toolbar.

Batch:

Finance

Print Invoices (Batch), Select the date invoices were created or select **Print All open invoices**

Click **Continue** if a date was selected.

The invoices will appear in a preview mode, click **Print** on the toolbar.

OR

Finance

Print Invoices (Past Due), Select a message to display on the invoice (default is none)

OK

The invoices will appear in a preview mode, click **Print** on the toolbar.

g) View/Edit/Delete Invoices:

4 ways:

1) From Ledger (Credit Cards Only)

Finance

View Registers; Select the Register the Payment was applied to.

Find and Select the transaction associated with the invoice (use name or date it was received)

To View, click **View Split Details**, You can change the account item only. Click **Close** to return to the Register.

To Delete, click **Void Transaction**, Select **Delete Invoice Payment** (The invoice will revert back to an open invoice) **OR** **Delete Entire Invoice**. Click **Close** to return to the Finance Menu.

2) From Make Deposits

NOTE: If the invoice was paid with a check or cash AND has already been deposited, you must first go to the register, locate the grouped deposit that included the payment and click the void transaction on the grouped deposit. All payments in that deposit will then return to the Make Deposits Form.

To help you locate when the invoice was deposited, Go to **Open/Closed invoices**, click on **View Paid Invoices**, Find the invoice and note the date it was deposited (Last column).

Finance

Make deposits; Select the Register the Payment was applied to.

Find and Select the transaction associated with the invoice (use name or date it was received)

To View, click **View Split Details**, You can change the account item only. Click Close to return to the Make Deposits form.

To Delete, click **Void Deposit**, Select **Delete Invoice Payment** (The invoice will revert back to an open invoice) **OR Delete Entire Invoice**. Click **Close** to return to the Finance Menu.

3) From Open/Closed Invoice

Finance

Open/Closed Invoice, Click in a field that you know identifies the invoice (i.e. number, customer) and then use the A-Z sort or find functions of access to locate the invoice.

For Invoices Still Open

Invoice Detail, You can change the account item only. Click **Close** to return to Open Invoices. To Delete, click **Delete Invoice**. Click **Close** to return to the Finance Menu.

For Invoices Paid

View Paid Invoices, Click in a field that you know identifies the invoice (i.e. number, customer) and then use the A-Z sort or find functions of access to locate the invoice

NOTE: If the invoice was paid AND has already been deposited (There will be a date in the deposit date field, last column, you must first go to the register, locate the grouped deposit that included the payment and click the void transaction on the grouped deposit.

Invoice Details, You can change the account item only. Click **Close** to return to Paid Invoices.

To Delete, click **Delete Invoice**. Click **Close** to return to Open Invoices.

4) From Add/Edit Invoice

Finance

Add/Edit Invoice, Click in a field that you know identifies the invoice (i.e. number, customer) and then use the A-Z sort or find functions of access to locate the invoice. Edit the invoice as desired.

NOTE: To delete an item, select the record selector box FOR THAT ITEM (square gray box to the left of the account). There will be an arrow in the box indicating the record is selected.

To Delete, click **Delete Invoice**. Click **Close** to return to the Finance Menu.

h) Receive Payments:

Finance

Open/Closed Invoices, Find and select the invoice to apply a payment

Receive Payments, Enter the date paid, amount, payment type and check #/ approval code

Close, to return to the Open invoices form

Receive another payment or click **Close** to return to the Finance Menu.

i) Merchandise Sale(s):

Merchandise Sales; enter the customer name (optional), the items sold and their quantity.

NOTE: Items for sale come from the Inventory data that are flagged as items for sale, if the item being sold does not appear in the selection box, you must enter the item as Inventory Sale item first.

Payments **MUST** be received before closing this form on all Merchandise Sales, if payment cannot be received, create an invoice and adjust inventory levels manually.

You can also keep a manual log and enter these once a week in bulk quantities. Keep Cash, Credit Cards, and each check as separate sales.

Receive Payment, Enter Date paid, amount, payment type and check #/approval code

Close to return to merchandise Sale, Inventory Quantities will be updated based on Quantities Sold.

Close to return to the Main menu.

j) Enter Bill:

Finance,

Enter Bill, Select Pay to Name, Reference # (i.e. their invoice #) then enter items and amounts.

Close when done.

NOTE: You may also enter bills and payments directly into the registers provided there are no split details to record. For example, you may enter the phone company bill directly into the register since the entire payment will be assigned to the telephone expense account. Check number should be set to print if you are utilizing the program to print your checks. An example of when not to use direct entry for bill payments would be a credit card since the money paid may be applied to more than one expense account and in this case the Enter Bill/Pay Bill functions should be used.

k) View/Edit/Delete Bill:

3 ways:

1) From Ledger

Finance

View Registers; Select the Register the bill was paid from.

Find and Select the transaction associated with the bill (use name or date it was issued)

To View, click **View Split Details**, You can change the account item only. Click **Close** to return to the Register.

To Delete, click **Void Transaction**, Select **Delete Bill Payment** (The bill will revert back to a bill to be paid) **OR Delete Entire Bill**. Click **Close** to return to the Finance Menu.

2) From Pay Bill

Finance

Pay Bills, Click in a field that you know identifies the bill (i.e. number, customer) and then use the A-Z sort or find functions of access to locate the bill.

To Edit

Bill Detail, Edit as desired. Click **Close** to return to Pay Bills form.

To Delete

To Delete, click **Delete Bill**. Click **Close** to return to the Finance Menu.

3) From Enter Bill

Enter Bill, Click in a field that you know identifies the bill (i.e. number, customer) and then use the A-Z sort or find functions of access to locate the invoice. Edit the bill as desired.

NOTE: To delete an item and not the entire bill, select the record selector box FOR THAT ITEM (square gray box to the left of the account). There will be an arrow in the box indicating the record is selected. Then click **Delete Bill Item**

To Delete, click **Delete Bill**. Click **Close** to return to the Finance Menu.

l) Pay Bill:

Finance

Pay Bill; Select the Register the bill was paid from

NOTE: If there are no bills to pay for this register, the program will provide a message there are no bills to pay, click **OK**.

Click the Check Box labeled "Pay Bill". Note the program provides a balance of the register along with a sum of bills to pay. Checking pay bill automatically enters this bill into the register as a to print bill.

Close to return to the Finance Menu

m) Print Check:

2 ways:

1) From Print Check(s)

Finance

Print Check(s), Select the Register the bill was paid from

NOTE: If there are no checks to print for this register, the program will provide a message there are no bills to pay, click **OK**.

The program provides you with the next check number to print, if incorrect enter the correct check number then click **Continue**.

Click the Check Box labeled "Print Check ONLY for those checks you want to print".

Click **Print Checks**.

Click **Close** to return to the finance menu.

NOTE: Check numbers are automatically updated in the selected register. To delete a check to print, click the **Delete Check to Print**. The record will then return to the Pay Bills function and is removed from the register.

2) From Registers

Finance

View Registers; Select the Register the bill was paid from

Find and select the check number to print.

Click **Create Check**, a check will load in preview form

Click **Print**

Close to return to the register

Close to return to the Finance Menu.

n) Deposit Money:

Finance

Make Deposits

Select the register to make deposits to, click **Continue**

Check the Deposit Checkbox to indicate this income will be deposited; repeat for each payment to be deposited.

NOTE: Each time the deposit box is checked, it will update the amount to be deposited. This function groups the payments so the deposit in the register will match the bank statement for reconciling.

If a payment was assigned to be deposited to the wrong register, you can also re-assign the register on this form. The last column is a selection box that you can use to re-assign the register for a payment.

Close to return to the Finance Menu

o) View Registers (Ledgers):

Finance

View Registers; Select the Register the bill was paid from

Close to return to the Finance Menu

p) Reconcile Accounts:

NOTE: Prior to Reconcile, note any interest income or bank service charges on the bank statement. Go to View Registers and enter 2 direct entry transactions, 1 credit for interest and 1 debit for bank service charges. These will appear in the reconcile form to be checked off as cleared.

Finance

Reconcile; Select the Register the bill was paid from

Enter the Period Ending Date and the Ending balance as provided on your bank statement

Check off all debits (checks) that appear on your statement including the entries made for interest and bank service charges.

Check off all deposits that appear on your statement

NOTE: If there is a debit or credit on your bank statement not listed in the reconcile form, this **MUST** be resolved. Close out of reconcile and correct the missing transaction.

If the register reconciles, the Difference Field at the bottom will be ZERO (\$0.00), If not, resolve the discrepancy or let the program make an adjustment of this amount in the register.

Click **Reconcile**

Click **Continue**, a reconcile report will print.

q) Create/View Budgets:

Finance

Create/View Budgets

Create Budge, enter a year for the budget, Actual expenditures will initially be ZERO for current and last year, these numbers will be updated by clicking **close**, then **Budget Detail**.

NOTE: You may create several budgets for the same year by entering 2004A for one and 2004B for another. This can be an aid to comparing 2 or more budgets by adjusting numbers and having a tool to aid in the approval of a budget. Once approved all variations of the budget for that year may be deleted except the approved one.

Enter comments and budget amounts for each income and expense account,
Click **Close** to return to budget summaries form
Close to return to finance.

r) Paychecks:

Finance

Create Paychecks; check the box for each employee to pay

Enter Paycheck Data; enter account for paycheck expenses, Gross salary, taxes, etc.

NOTE: Once a paycheck has been created you can use the **Load Last Paycheck Data for employee selected** to save on data entry time if pay is the same each payday.

Create Paychecks

NOTE: Paychecks will appear in Checks to Print, Tax liabilities will go to the Tax Liabilities to Pay form

s) Tax Liabilities:

Finance

Pay Tax Liabilities; check the box for each liability to pay

Pay Selected Liabilities

NOTE: Liability Payments will appear in Checks to Print and with a pay to as set on the Finance Menu for Fed, State, Local, FICA, and unemployment tax.

t) Sales Tax:

Finance

Pay Sales Tax; enter a date to pay sales tax thru (excludes sales tax for sales after this date)

Continue, if no tax due, click **OK** to the message.

Pay Tax, Sales Tax Payments will appear in Checks to Print and with a pay to as set on the Finance Menu for Sales Tax Pay to.

NOTE: You may also print a report of sales tax payables by clicking **Report**

Close to return to the Finance Menu

IV. TEAMS/COMMITTEES

a) Create:

Administration

Teams and Committees, *Enter the name and other information for the board*

Close to Return to the Main Menu

b) Add Team/Committee Member:

Administration

Boards and Committees, *Find and Select the Board or Committee desired*

View/Add Members, *Select the name to add and enter other information as desired*

Close to Return to the Board/Committee List

Close to return to the Main Menu

NOTE: *If the name does not appear, you must add the person in the Master contacts list, be sure to set the contact type to Individual.*

V. REPORTS/EXPORT/BROADCAST

a) Reports:

Reports

Master Report List, Turn the Check box to OFF for those reports you do not want

Close to return to the Reports Menu.

Select the Report from the selection box based on the report type you want

Click **Preview**

Close to return to the Reports Menu or **Print** to Print the report.

NOTE: Several Reports are based on criteria you select, i.e. date ranges. Also more reports can be found in the Merge/Export/Preview function (Next Section).

b) Merge/Export/Preview:

NOTE: This section contains many reports and functions; it also contains a list of files entered by the user that will open those files with a click of the mouse. The files can be Excel, word, PowerPoint, etc.

Merge/Export/Preview, say **OK** to the message about hyperlinks

1) Select one of 15 options in the yellow box

2) Next select 1 of the following 6 options based on the selection done in Step 1:

Preview Report
Information Sheet
Mailing Labels
Broadcast email
Broadcast Fax
Export to Excel

NOTES: It is recommended to Preview a report after your selection in step one to screen the data and make sure it is what you want

When selecting the Publishing Directory Option in Step 1, this also creates an Access file on your local drive that can be used to link to your website for easy updating of member information.

Exporting to Excel will open the exported file in Excel.

The next 2 sections will outline Broadcast email and Fax

c) Broadcast email/fax

When selecting Broadcast email or fax, a table is created called tblBroadcast. This is the table to merge word documents to and then use the merge to email function within MS Word. The tblBroadcast file contains the email and fax number for those individuals selected in step one of Merge/Export/Preview (Previous Section)

WinFax 10.0 or greater is required for broadcast Fax and must be setup by creating a phonebook in win fax that is linked to tblBroadcast.

VI. INQUIRIES

a) Add:

Inquiry Entry

Add New Entry, *Enter the information associated with the inquiry*

Close *to return to the Main Menu*

b) Call-In:

Inquiry Entry

Log Call-ins, *Enter the information associated from the call in Log*

Close *to return to the Inquiry Form*

Close *to return to the Main Menu*

NOTES: *It is recommended to keep a paper log for call-ins, and then periodically log these into the program*

There are also several reports you can run from the Inquiry and you can export these to excel.

There are also links to Inquiry Categories that allow the user to define these selections.

c) Walk-in

Inquiry Entry

Log Walk-Ins, *Enter the information associated from the Walk-In Log*

Close *to return to the Inquiry Form*

Close *to return to the Main Menu*

NOTES: *It is recommended to keep a paper log for Walk-Ins, then periodically log these into the program there are also several reports you can run from the Inquiry and you can export these to excel.*

There are also links to Inquiry Categories that allow the user to define these selections.

VII. TASK MANAGEMENT

a) Add Task:

Tasks

Enter New Task, *Enter data related to the task, Note that you can:*

Assign a task to a board/committee

Assign a task to a Major Event (After entry and set via Task Detail)

Repeat a task periodically; See Auto Create Tasks in the next section.

Close *to return to the task list*

Refresh Data *to see the task just created, to assign to an event, select the task just created and click Task Detail/Data Entry.*

Close *to return to the Main Menu*

b) Auto Create Tasks

Tasks

Create PM and Repeat Tasks Due, *This function will automatically create open tasks based on PM tasks and Repeat Tasks due within the next 30 days. They will appear on the open tasks list.*

c) Edit Task

Tasks, *Find and select the task desired*

Task Detail/Data Entry, *Enter data related to the task*

Close *to return to the task list*

Close *to return to the Main Menu*

d) Complete Task:

Tasks, *Find and select the task desired*

Task Detail/Data Entry, *Enter date closed, closed by and then set the closed checkbox to ON*

Close *to return to the task list*

Close *to return to the Main Menu*

VIII. INVENTORY

a) Add:

Inventory

Add New, *Enter the data for the inventory item*

Close *to return to the inventory screen list*

Close *to return to the Main Menu*

b) Edit:

Inventory, *Find and Select the inventory item desired*

Item Detail, *Edit the information desired*

Close *to return to the inventory screen list*

Close *to return to the Main Menu*

c) Find

NOTES: *Primary and Secondary Keywords can be assigned to inventory items to aid in finding them on the master inventory list. A primary keyword may be battery with a secondary keyword of 9 volt.*

Inventory, **Select a Primary Keyword**, all matching records are displayed,

Select a Secondary Keyword (Associated with Primary) and the list can be further limited

Item Detail, *Edit the information desired*

Close *to return to the inventory screen list*

Close *to return to the Main Menu*

IX. EQUIPMENT/LOCATIONS

a) Add:

Equipment

Add New, Enter the data for the equipment or Location

Close to return to the master equipment list

Close to return to the Main Menu

b) Edit:

Equipment, Find and Select the Equipment/Location desired

Equipment Detail, Edit the information desired

Close to return to the master equipment list

Close to return to the Main Menu

c) Preventive Maintenance Tasks:

Equipment, Find and Select the Location/Location desired

Equipment Detail,

Attach PM's/Cals, IF the list is blank click **Add New Master Listing**; Enter the Preventive Maintenance Task (i.e. Change Oil) Click **Close**.

Find and select the PM task to add

Attach to Equipment, Enter the detail data for this PM as it relates to the Equipment/Location Selected

NOTES: This PM task will automatically be created within 30 days of its next due date (determined by date last done and frequency in days).

Close to return to the Equipment/location detail

Close to return to the master equipment list

Close to return to the Main Menu

d) Spare Parts:

Equipment, Find and Select the Equipment/Location desired

Equipment Detail,

Attach Spares, IF the list is blank click **Add New Item**, Enter the Inventory Detail (i.e. Battery) Click **Close**.

Find and select the spare part from inventory to add

Attach to Equipment, Click **OK** to the message the item has been attached

Close to return to the Equipment/location detail

Close to return to the master equipment list

Close to return to the Main Menu

Product Code: SB Solutions

SB Solutions user materials were designed for *SB Solutions* software running on an IBM compatible personal computer with Microsoft Access 2000, 2002 (XP), 2003 or 2007. The software was designed to run standalone or in a multiple user configuration on a network.

This User Guide was designed and developed by *Ron Oimoen* of BAAC, Inc., PO Box 1718., Tavares, Florida, 32778.

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