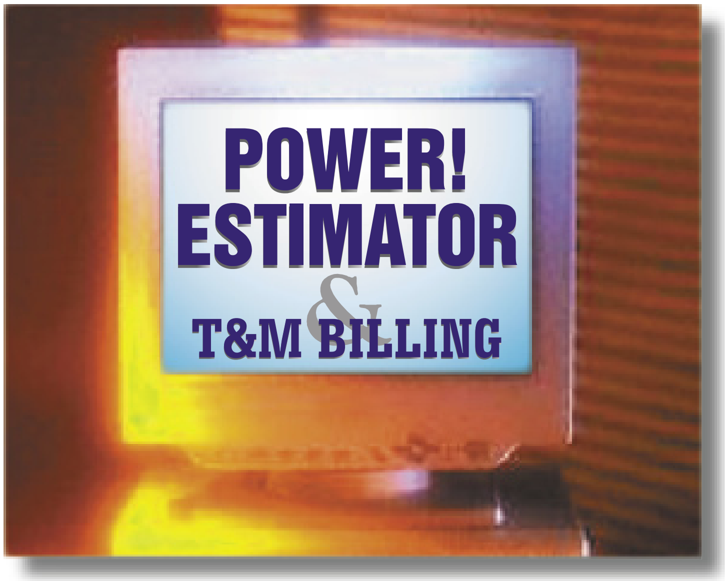
Power!™ Software Tutorial



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Installation of Power! Free Trial Software

Install in Windows® XP, 2000, 98, 95, ME and NT

1) Close any open software programs. If downloaded from www.jaffesoftware.com, double click the PowerSetup.exe file on your hard drive, or insert the Power!™ CD ROM into your drive. Wait for the installation window to appear, or if the installation window does not appear:

a) Click the Windows **Start** button, then click **Settings**, then click **Control Panel**.

b) Double click on the **Add/Remove Programs** icon. The Add/Remove Properties appears.

c) Click the **Install…** button, then follow the prompts for installation of PowerSetup.exe.

2) Start Power!™ by double clicking the Power! Demo icon on your Windows™ desktop.

Password is **RUN DEMO**. The trial period will eventually end. Re-installing will not extend it.

Power!™ Software Tutorial

This tutorial is a basic introduction to the Power! Estimator and T & M Billing™ software. This tutorial assumes that you have a basic working knowledge of Windows applications.

Power! Estimator and T & M Billing™ includes three fully-integrated programs:
1) Power! Electrical Material Data Base™ 2) Power! Estimator™ 3) Power! T & M Billing™

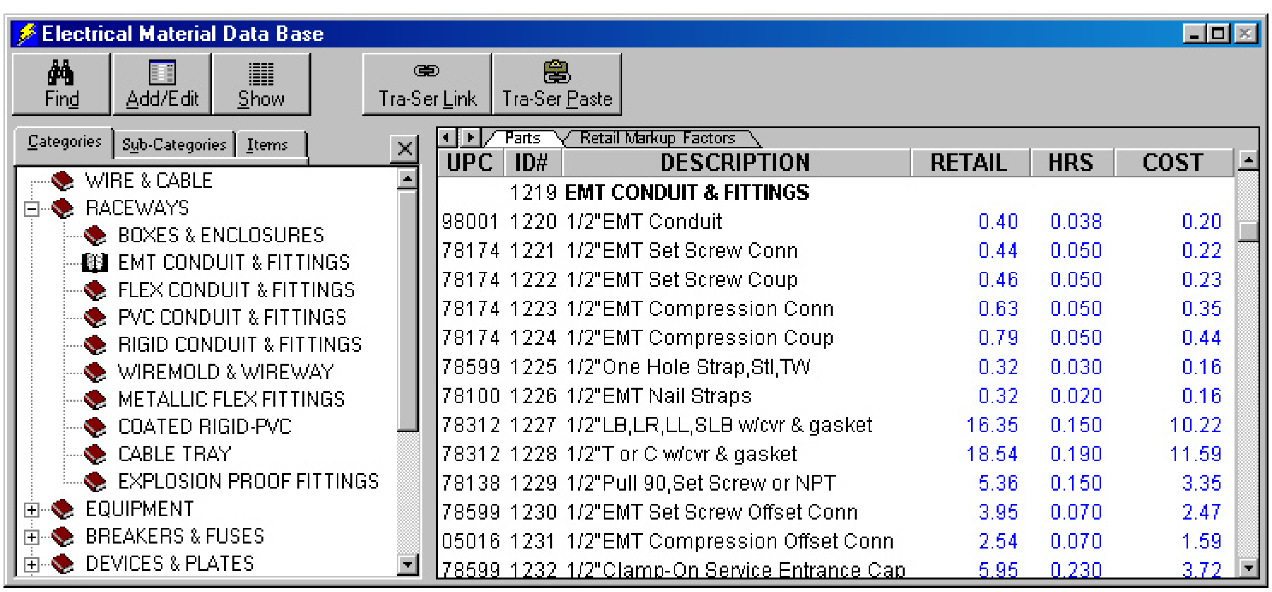
Power! Electrical Material Data Base™

This is a quick tutorial of the Power! Material Data Base™ software. Press the F1 key at any time for on-line help.

The Material Data Base stores data for electrical items. This data is used for estimating and invoicing. You can add new items, edit existing items, change pricing by a percentage, update pricing, print, lookup parts and more.

Let's lookup the price for EMT conduit using the Material Lookup Explorer

1) Double click on the **RACEWAYS** icon in the left window pane, then double click **EMT CONDUIT & FITTINGS**.
2) The EMT category of the Material Data Base is now displayed in the right window pane.
3) Click on the vertical scroll bar to look up the price for any EMT part.

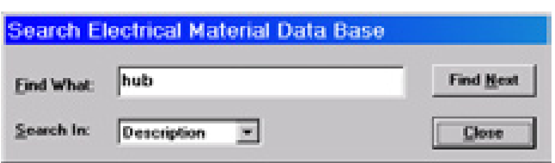


Use the Material Lookup Explorer to locate items in the Material Data Base:

- **To resize the Material Lookup Explorer window**, move the mouse pointer over the splitter bar (between the left & right window panes) until it turns into a double arrow. Then click and hold down the left mouse button while dragging the splitter bar to the desired position.
- **Click on the Category tab** to lookup items in a material category. Double click on a book to open a category. Double click again to close the book. Press the **Escape** key to close all books. Click on the right hand vertical scroll bar to locate items in the right window. Use mouse or arrow keys to navigate.
- **Click on the Sub-Category tab** to lookup items within the many material sub-categories. Clicking your left mouse button on a sub-category will display the items in it. Then you can single click on the item and it will display in the right window pane. Double click the item and a detail view of the item will display.
- **Click on the Items tab** to look for items containing specific letters or numbers. In the **Find What** box, type just a few characters of the item you are looking for. A list of all items containing the letters typed will display. Click on an item and it will display in the right window. Double click the item and a detail view will display.
- Click the **Find** button to search for a few letters of an item.
- Click the **Detail View** button to show the Electrical Material Data Base – Detail View.
- Click the **Columns** button to show or hide material data base columns.

Let's find a part using computerized search.

1) Press **F6** or, select **Find Parts** from the **Materials** menu. You will be presented with the following dialog box:



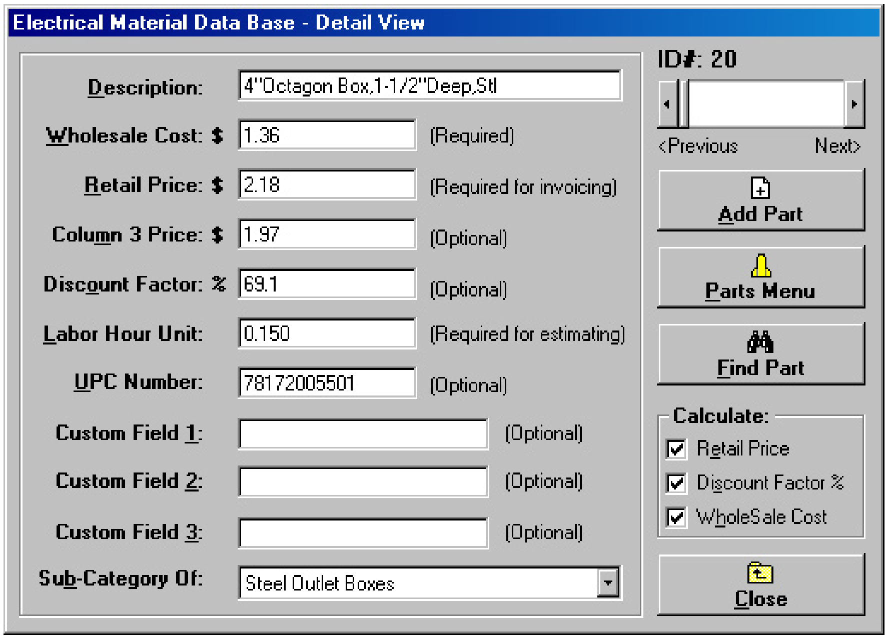
2) Select “**Description**” from the “**Search In:**” list.
3) Click in the **"Find What"** box, then type a few characters of the part you are searching for. Type in the letters “**hub**”.
4) Click the **Find Next** button, or press the **ENTER** key. Keep clicking the **Find Next** button until the item is found, then click **Close** button. If a match is made the item will display in the Data Base window. Try different characters if needed.
5) To begin a new search, repeat the above steps.

Let's enter a new price for an existing material.

1) Click on a price in the Cost column of the Electrical Material Data Base window.
2) **Type** in a new price (numbers only), then press the **Enter** key. It's that simple!

Let's enter a new part.

1) Double click on any part in the Electrical Material Data Base window (window on the right). The Electrical Material Data Base - Detail View will display.



2) Click the **Add** button, then either select a category to add the new part into, or press the **Escape** key to display the next blank row in the Material Data Base.
3) Type in a **Material Description** for the new part, then press the Enter key.
4) Type in the **Wholesale Cost** (contractor price), then press the Enter key.
5) Press the Enter key to bypass the calculated **Retail Price** (resale price), or type in any retail price you want.
6) Press the Enter key to bypass the **Column 3 Price** (manufacturers suggested price) or, type in the column 3 price.
7) Press the Enter key to bypass the **Discount Factor** percentage, or type in a discount factor. (Discount Factor percentage X Column 3 Price = Wholesale Cost).
8) Type in a **Labor Hour Unit** (decimal portion of an hour to install the part). Press the Enter key.
9) Press the Enter key to bypass the **UPC Number** (uniform product code), or type in an 11 digit UPC number.
10) Press the Enter key to bypass **Custom Field 1, 2 or 3,** or enter letters or numbers, if needed. These are dummy fields, meaning they only hold information for viewing and are not used in estimating or invoicing.
11) Optionally assign the item to a material Sub-Category by selecting from the Sub-Category list box. To add more parts, click on **Add** again and repeat the process.
12) Click the **Close** button when done.

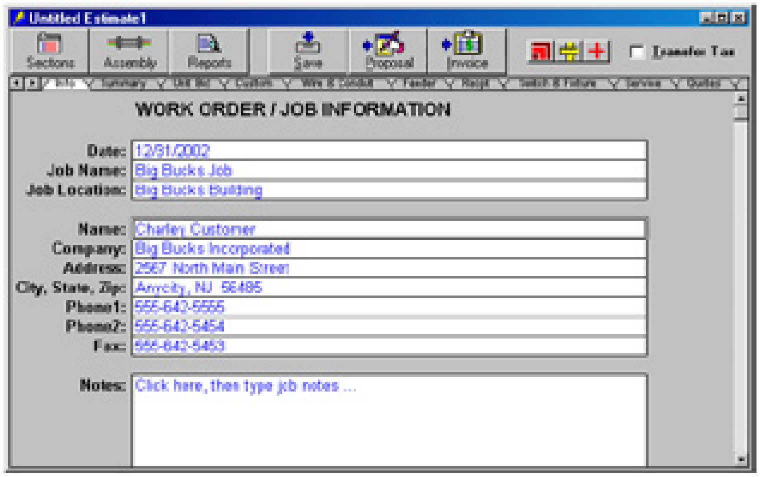
That concludes our quick tutorial of the Power! Electrical Material Data Base™ software. Press F1 for on-line help.

The Power! Estimator™

This is a quick tutorial of the Power! Estimator™ software. For more detailed instruction press the **F1** key for on-line help.

First, let's make a new estimate

1) Select **New** from the **File** menu, then select and click **Estimate**. A new untitled estimate window appears with the Work Order / Job Information window displayed. This window is used for creating work orders and recording job information.



The Power! Estimator™ sections are arranged in windows accessed by clicking the corresponding tab. To scroll through all the tabs, click the arrow icon in the upper left hand corner of the estimate window.

The estimate window represents one estimate (though you may have many estimates open at once). Each tab displays an estimate section. All sections are automatically added into the selling price displayed in the Bid Summary section.

Use these different estimating sections combined or separately, according to your preferences or estimate requirements.

- Use the Unit Bid section for listing miscellaneous materials and labor.
- Select assemblies for instant wire & conduit, feeder, receptacles, switches & fixtures, and main service. Create your own assemblies using our Custom Assembly section.
- The Premise Wiring section is well suited for entering the entire take-off from electrical plans for devices, fixtures, and dedicated circuits for homes, stores and offices.
- Use the Quotes section for quotes from vendors, sub-contractors, trenching, etc.
- Three condensed parts list are built, Parts List, Purchase Order and Quote Request.
- The Bid Summary allows you to adjust the selling price, labor, profits, direct costs, etc.

For purposes of this tutorial we are going to jump right into assembly estimating.

The **quickest way to estimate** is using our built-in assembly templates. Assemblies are groups of electrical parts. They can be saved as individual files to your hard drive. These files can be opened into different estimates having similar material and labor requirements. You may create and save an unlimited number of assemblies with Power!™.

Unique to our estimating system are six fully adjustable assembly templates which greatly facilitate the creation of electrical material groups.

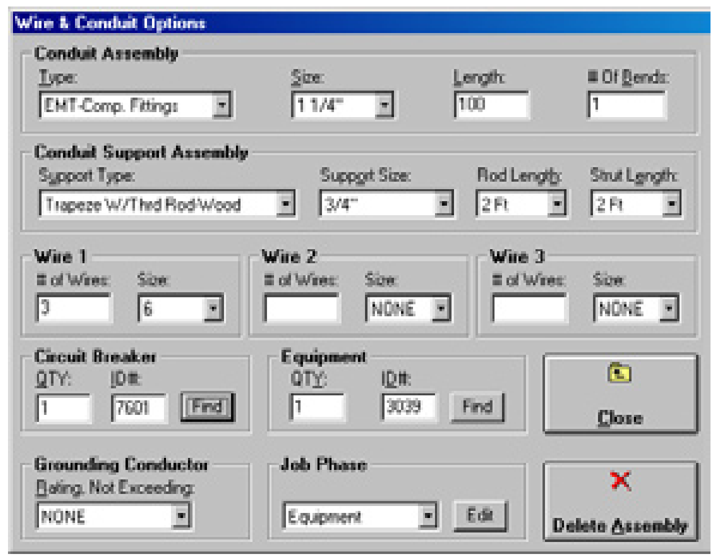
- The **Wire & Conduit** assembly quickly creates conduit, fittings, and wire combinations.
- The **Feeder** assembly automatically sizes your conduit for feeders with optional grounding conductor, circuit breaker and equipment.

- The **Receptacle** assembly quickly creates receptacle outlets, branch and home run. It automatically generates materials and labor based on a small amount of input. For example; entering a receptacle quantity will generate the proper quantity and type of boxes, plates, wire nuts, cable, conduit, wire and fittings!
- The **Switch & Fixture** assembly quickly creates switch and fixture outlets, branch and home run. It also automatically generates materials and labor.
- The **Main Service** assembly sizes your conduit and wire for 3 wire single phase or 4 wire three phase electric services.
- The **Custom Assembly** allows you to build any assembly with up to 49 parts each. Use it for adding any needed material or labor into an estimate. This assembly template works very well for multi-phase projects.

Let's create a Wire & Conduit assembly

1) Click on the **Wire & Conduit** tab at the top of the window to display the assembly window.
2) Click on the **Options** button. Wire & Conduit Options is now displayed.
3) Select options for wire & conduit assembly, then click the **Create Assembly** button. The parts displayed can easily be deleted, changed or added.
4) Type in an assembly description.
5) Enter a percentage in the **Adjust Hrs** box to adjust for the difficulty of the job (70% is a good starting point for new construction work).

An endless number of assemblies can be created.



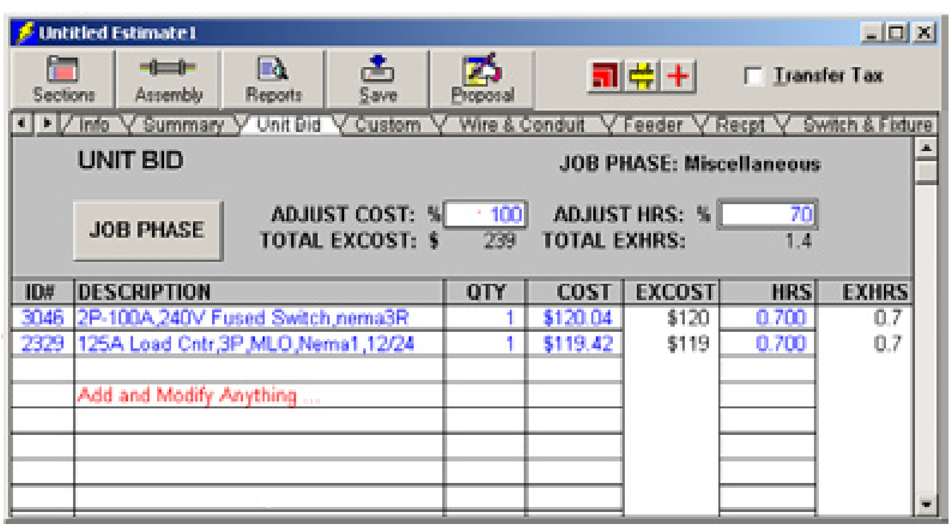
To make more assemblies:
Click the **Assembly** button, then select **New Assembly**, then click **Wire & Conduit Assembly**. A new assembly will be created below the first assembly. Move between assemblies by pressing the HOME, PAGE DOWN or PAGE UP key. Assemblies can be saved to your hard drive, then opened in other estimates using features in the Assembly button.

Repeat the above process for Feeder Assembly, Receptacle Assembly, Switch & Fixture Assembly, Main Service Assembly and Custom Assembly.

The most basic method of estimating is called the Unit Bid. This is the process of adding items into an estimate list.

Let's add some parts to the Unit Bid

1) Click on the **Unit Bid** tab at the top of the estimate window to display the Unit Bid section.



2) **Right** click on a blank row below the Description or ID# heading in the estimate window. The Material Data Base pop-up menu will display. Click on a material category from the Material Data Base pop-up menu. The **Select Items** window will display. To use the **Select Items** window, follow these instructions:

a) A list of materials for the category selected is already displayed. Find items by scrolling the list, or type a few characters of the item in the "**Find What**" box. Click the **Find Next** button to display items that contain your search characters.

b) Narrow your choices by selecting a sub-category that is within a material category. Click the **Sub-Category List** to select a sub-category. A list of materials for the sub-category will display. Click the **Category** tab to select from a different material category.

c) Click on the **Items** tab to look for items containing specific letters or numbers. In the **Search Entire Data Base For:** box, type a few characters of the item you are looking for. A list of all items containing the characters typed will display.

d) Click on the items needed, then click the **OK** button.

Alternate Method:

1) From the Window menu click **Tile Horizontal**. The windows are now arranged horizontally.
2) **Right** click in the Electrical Material Data Base window. The Material Data Base pop-up menu will display.
3) Click on a material category from the Material Data Base pop-up menu.
4) Click on the vertical scroll bar until you see the part needed. Click on the part.
3) Click on the **Estimator** window to make it active, then double click on a blank row under the **ID#** or **DESCRIPTION** column heading. The part selected in the Material Data Base is now in your estimate. Repeat to add all the parts you need.

Want to lock-in prices with your vendor?

Let's create a Quote Request

1) In the estimate window, click the **Reports** button, then click on **Quote Request**.
2) Click the "**OK**" button when prompted. The Quote Request window will be displayed with a list of all the estimated materials to be quoted for the job. Print, mail or fax the form for your vendor to fill-in.

Once you have the job you will want a Parts List.

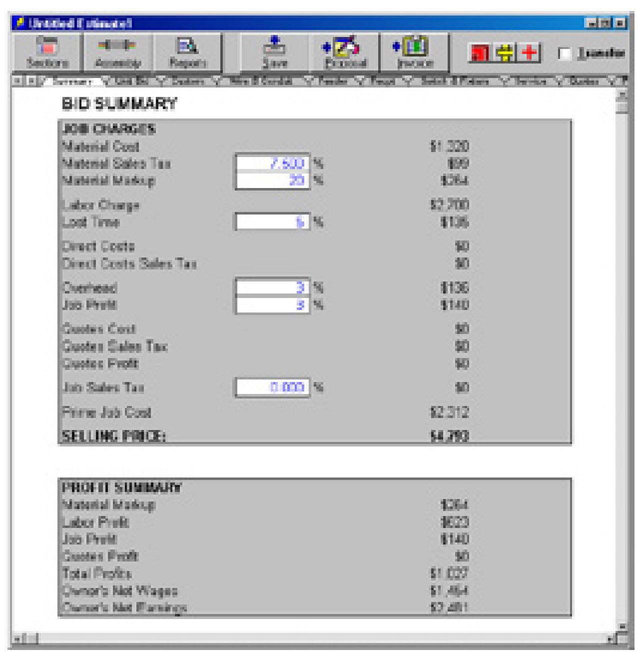
Let's create a Parts List

1) In the estimate window, click the **Reports** button, then click on **Parts List**.
2) Click the "**OK**" button when prompted. The Parts List window will display with a list of all the estimated materials.

The Bid Summary is where final adjustments are made that will win you the bid!

Let's view the Summary window

Click on the **Summary** tab to display the Bid Summary window, or click the **Reports** button and then click on **Bid Summary**.



Let’s adjust the selling price in the Summary window

1) Use the scroll bars to display job charges, job profits, labor breakdown, direct costs and assembly totals.
2) Select an input box to change by clicking on it with the mouse.
3) Type in a new number, then press the Enter key.
The real beauty of Power!™ becomes apparent when you adjust any number and a new selling price is calculated instantly.

Want to create a summary based on a job phase?

Let’s create a Job Phase Summary

1) Click the **Reports** button, then click on **Job Phase Summary**. The “Create A New Job Phase Summary?” window will display. Click the **OK** button. The “Select Job Phases To Include In Report” window will display.
2) Make sure the job phases you want to include in the report are listed on the right. Add or remove job phases as needed.
3) Click the **OK** button. The report will display. Click the scroll bar to view the entire report.

The final step in preparing a bid for your prospective customer is completing the Proposal/Contract form.

Let’s create a new Proposal/Contract.

1) In the Estimate window, click on the Proposal button, or from the **File** menu, select **New**, then select **Proposal**. Then select and click **Unlimited Pages**. A new untitled Proposal/Contract window will appear.
2) For detailed instruction in creating, saving and opening Proposal/Contracts press F1 for on-line help.
3) Select **Close** from the **File** menu to close the Proposal/Contract window.

That concludes our quick tutorial of the Power!™ Estimator software. For more instruction press F1.

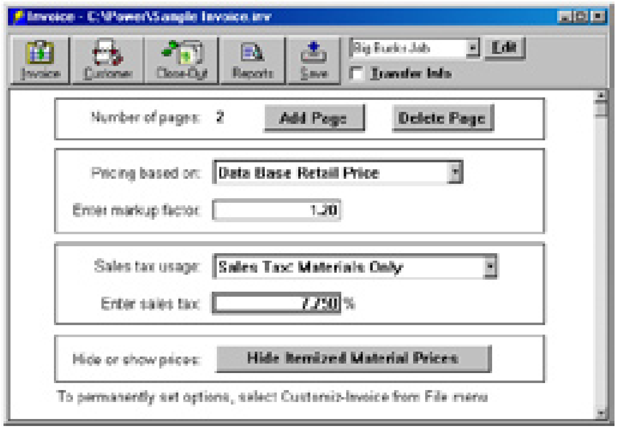
Power! T & M Billing™

This is a quick tutorial of the Power! T & M Billing™ software. For more detailed instructions press **F1** for on-line help.

Power! T & M Billing™ consists of three fully integrated software programs: Invoicing, Accounts Receivable and Customer/Vendor Data Base.

Let’s customize the invoice window.

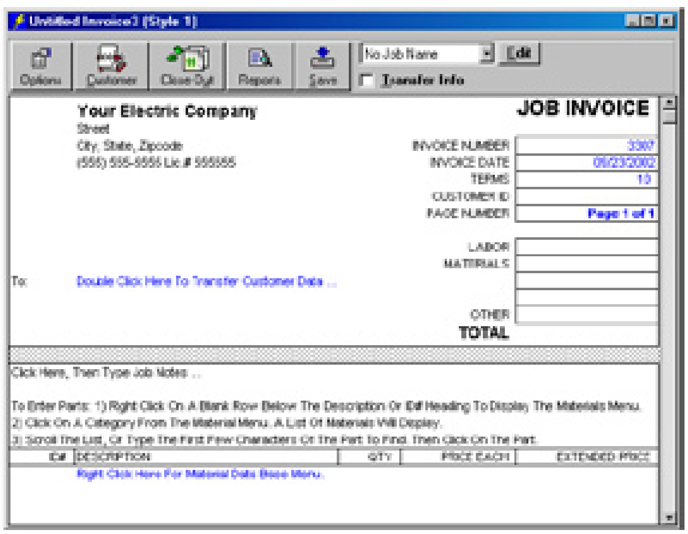
Before making your first invoice, customize the invoice window to fit your company needs. This way information is entered only once and will be automatically displayed on every invoice you make. To customize the invoice window:
1) Select **Customize** from the **File** menu, then select **Invoice**, then click on one of the seven invoice styles.
2) Click with the mouse on the words “YOUR ELECTRIC COMPANY” at the top of the invoice window. Type in your company name, then press the Enter key twice. Repeat this process for address and telephone number.
3) Click the **Options** button at the top of the window, then click **Sales Tax Usage**. The invoice options dialog will display.



4) Select options for invoices by clicking with the mouse, then either select an option or type in a new value. Click the **Invoice** button when done to return to the invoice.
5) Select **Close** from the **File** menu. You will be prompted to save your changes. Click **Yes** to save changes or click **No** to close without saving changes.

Let’s make a new Invoice

1) Select **New** from the **File** menu, then select **Invoice**, then click on an invoice style. A new invoice window will display.

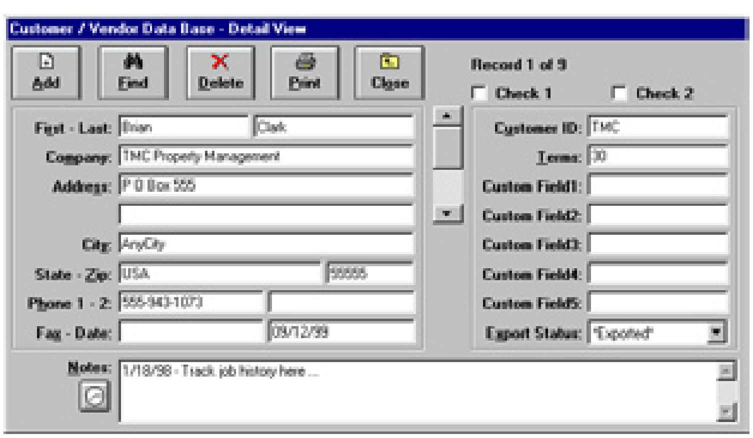


Lets open the Customer/Vendor Data Base

1) Click the **Customer** button (top left of the invoice window).

Lets add a new customer into the Customer/Vendor Data Base

1) The Customer/Vendor Data Base - Detail View is displayed.



2) Click the **Add** button for a new record. Fill in the data by typing information, then press the Enter key to move to the next field. Click the **Close** button when done.

Lets place customer information into the invoice

1) Click on the invoice window to make it active, then double click again on the words "Double Click Here To Transfer Customer Data ...". A customer list will appear.
2) With the mouse, click on any customer. The selected customer will now appear in the invoice. To edit the customer information in the invoice, select, then press the F2 key.

Use of a double window envelope eliminates the need to address and return address envelopes. (Deluxe #091564 Double Window Envelope 8 5/8"X 3 5/8" 800-328-0304)

Lets fill-in job notes for the invoice

1) Click on the job notes area (below the customer address) to display a text dialog box. Type in any notes about the job. Click **OK** when done.

Lets fill-in the material section of the invoice

The material section (below job notes) can be used to itemize parts or, you can type in flat rates. Anything can be typed into the material section of the invoice.

To copy parts from the Electrical Material Data Base to the invoice:

2) **Right** click on a blank row below the Description or ID# heading in the estimate window. The Material Data Base pop-up menu will display. Click on a material category from the Material Data Base pop-up menu. The **Select Items** window will display. To use the **Select Items** window, follow these instructions:
   a) A list of materials for the category selected is already displayed. Find items by scrolling the list, or type a few characters of the item in the "**Find What**" box. Click the **Find Next** button to display items that contain your search characters.
   b) Narrow your choices by selecting a sub-category that is within a material category. Click the **Sub-Category List** to select a sub-category. A list of materials for the sub-category will display. Click the **Category** tab to select from a different material category.
   c) Click on the **Items** tab to look for items containing specific letters or numbers. In the **Search Entire Data Base For:** box, type a few characters of the item you are looking for. A list of all items containing the characters typed will display.
   d) Click on the items needed, then click the **OK** button.

To type in a flat rate:
1) Use the vertical scroll bar to display the material section of the invoice (below the job notes area).
2) Click in a box under the DESCRIPTION column. Type a flat rate description then press the **Enter** key twice. Type the number 1 in the QTY column then press the **Enter** key twice. Then type the flat rate price in the PRICE EACH column.

Lets fill-in the labor section of the invoice

Press the **END** key (or use the vertical scroll bar) to move to the first line of the Invoice Labor Charges area (bottom of the invoice page). Fill-in labor charges using either of two methods:
Select Labor From List: Click the right mouse button on a line in the labor section, then select an employee from the Labor / Employees list. Employees can be set-up in the Electrical Material Data Base under the Custom Category named Labor / Employees.
Type In Labor Information: Click in a box under the DATE column. Type a date (format is: 01/01/09), then press the **Enter** key twice. Repeat this process for DESCRIPTION, HOURS and HOURLY RATE (by the way, column headings can be changed by simply typing over them).

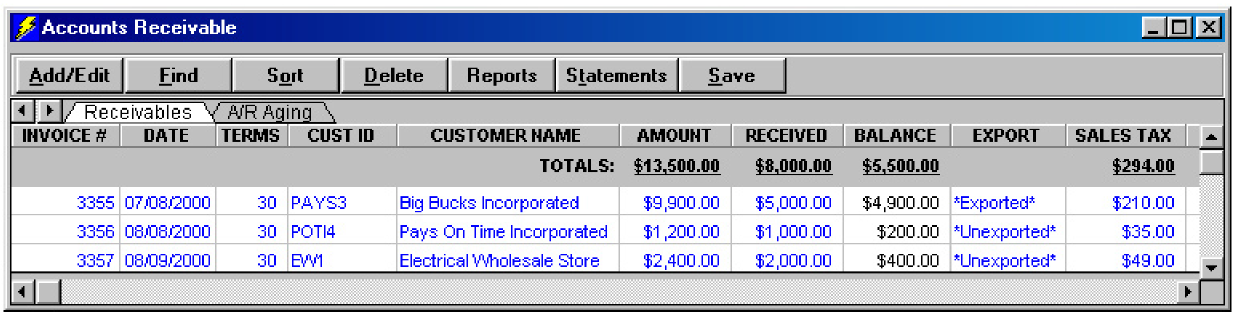
When you are done making your invoice, close it out so that it is recorded in the Accounts Receivable and saved to a file for future use.

Let's Close-Out our invoice.

1) Click on the invoice window to make it active.
2) Click the **Close-Out** button from the top of the **Invoice** window, then click the **Yes** button. All prices on the invoice will be locked. This insures that as prices change in the Material Data Base that the invoice will retain the prices as invoiced. Locked prices can be unlocked by using the DeOverWrite feature. To unlock an item, click on it, then press the **F5** key. The red item (locked) will turn blue (unlocked).
3) You will be prompted with the Save As dialog box. Select a folder to save the invoice in and type a name for the invoice. Click the **Save** button when ready.
4) Invoice information will be automatically posted to the Accounts Receivable. The Accounts Receivable window is now displayed.

Let's look at the Accounts Receivable window.

The Accounts Receivable records key invoice information including; invoice number, date, terms, customer name, invoice amount, export status, sales tax, sales tax percentage, materials and labor, other and job name.



INVOICE #	DATE	TERMS	CUST ID	CUSTOMER NAME	AMOUNT	RECEIVED	BALANCE	EXPORT	SALES TAX
				TOTALS:	$13,500.00	$8,000.00	$5,500.00		$294.00
3355	07/08/2000	30	PAYS3	Big Bucks Incorporated	$9,900.00	$5,000.00	$4,900.00	*Exported*	$210.00
3356	08/08/2000	30	POTI4	Pays On Time Incorporated	$1,200.00	$1,000.00	$200.00	*Unexported*	$35.00
3357	08/09/2000	30	EW1	Electrical Wholesale Store	$2,400.00	$2,000.00	$400.00	*Unexported*	$49.00

The total invoice sales AMOUNT, total money RECEIVED and total BALANCE is displayed at the top of the Accounts Receivable list. As payments are received from customers, enter the amount paid in the received column. Total sales tax, total materials and total labor are also displayed. To display additional fields click the horizontal scroll bar on the hand right arrow.

Double click on any record in the window. The Accounts Receivable - Detail View will appear. This dialog is used to add, edit, find or delete Accounts Receivable records. Click the **Close** button.

The Accounts Receivable can be used to add external invoice records, edit existing records, sort, print, search and delete invoice records.

In addition to the features we have explored in this short tutorial, the Power!™ T&M Billing software includes features for creating accounts receivable reports and statements. Reports can be automatically created for customers, jobs, sales tax payable, material & labor and an excellent invoice aging report. Statements can be automatically created to help you get paid. Play with these features by clicking the **Reports** and **Statements** button at the top of the Accounts Receivable window.

That concludes our tutorial of the Power!™ T&M Billing software. For detailed instruction press F1 for on-line help.