

A P P L E S E E D S S O L U T I O N



Contact
Management

TOUCHBASE™
P R O

Electronic
Forms



Accounting

Mac
P&L™

What are the 3 products in this Solution?

Informed Foundation™ replaces traditional paper forms by giving you the tools to easily create your own custom electronic forms or modify our existing templates. The special designs, calculations and flexibility you need in your forms are simple with Informed.

TouchBase™ Pro gives you the tools to efficiently manage your business and personal contacts. Addresses, follow-up dates, letters, envelopes, labels and notes all make it possible for you to organize the information you have on your contacts and stay on top of your everyday activities.

MacP&L™ is full power accounting software that goes well beyond the basics of bookkeeping. Over 100 standard reports give you comprehensive management reporting that helps you better manage your business while MacP&L manages your books. MacP&L covers all the basics too, offering integrated general ledger, accounts receivable, accounts payable, payroll and inventory.

Working together on common business tasks

By working together, these 3 applications give you a complete and highly effective solution for your everyday business tasks: contact management, forms filling and accounting.

▲ Call an Informed form from TouchBase Pro

As you are reviewing your contact files, you may need to fill out various types of forms for that contact (e.g. quotes and invoices). Instead of rekeying (or hand writing) the information that already exists in TouchBase Pro onto your forms, simply select the command from the Tools menu corresponding to the type of form you want to fill out, and presto - the form is instantly filled out!

▲ Return to TouchBase Pro and append the notes

Instead of manually typing in a comment about the form you've just completed into the contact's notes field, simply select the "Return to TB Pro & Append Notes" command, and an appropriate comment (e.g. 10/04/94 - 2.13 PM: Sent Quote # Q100) is automatically added to that contact's notes.

▲ Lookup information into a new form in Informed®

As you complete a new blank form, Informed Manager fills in various defaults (e.g. the date). In the case of the Invoice form, simply type the company name, and the address, phone and other data will be looked up in MacP&L (or TouchBase Pro) and placed in the form for you. The same goes for part numbers: choose the part number from a choice list and watch the price and description fill in automatically. The end result? Great looking invoices, quickly and accurately.

▲ Update your Choice Lists in your Informed Form

As the names of the people in your MacP&L customer file change, you will want those changes to be reflected in your choice lists in Informed. By simply selecting a command from the Scripts menu, your choice list will be automatically updated, so you'll never have to key in the same data twice.

▲ Duplicate a collection of forms

If you bill clients on a monthly basis, you may want to duplicate a collection of forms from the prior month. (To do this, find the forms you want to duplicate using the Find command, then select the Duplicate Current Collection command). The current forms will be duplicated exactly but will have the current date and a new unique invoice number on them. The result is more accuracy and less work at month end.

▲ Add a new customer or vendor

As new contacts are added to your TouchBase Pro file, you may want to add them as a new customer or vendor to MacP&L directly. Similarly, you may want to occasionally add a customer or vendor on the fly from an Informed form. Simply select the "Add New Customer to MacP&L" command in TouchBase Pro or Informed. Type in the new information when asked and the contact will be added without any rekeying or application switching.

▲ Submit a completed form to MacP&L

Once you have completed a form, instead of using awkward import/export procedures, the information can be sent directly to MacP&L to update the accounting system. By choosing Submit from the File Menu, the data will be automatically sent to MacP&L and the information will appear in MacP&L as if you had typed it in directly; you'll never have to rekey information from a completed form again.

▲ Prepare a customer statement

During the course of your business operations, you will want to prepare a custom statement for a particular client. Once you've changed the statement to meet your requirements, open it and select the "Prepare Statement" command. You will be asked for the customer number, start date and end date - the rest will happen automatically.

▲ Batch submit forms to MacP&L

On occasion it may be more convenient to send all of your forms to MacP&L at once. This can be done with the Invoice and Purchase Order form by selecting the Batch Submit command from the Scripts Menu. Batch submission is faster and eliminates repeated separate submissions.

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When you purchase this Solution, you will receive a set of 15 pre-linked forms including Credit Application, Credit Memo, Depreciation Declining Balance, Depreciation Straight Line, Depreciation Sum of Years, Fax Cover, GJ/Reversing Journal Entry, Invoice (1 Page), Invoice (2 Page), Letterhead, Purchase Order, Quote, Request for Quote, Service Invoice, and a Statement; a TouchBase Pro sample Contact file; and a MacP&L sample Company file. In addition, inside every Informed Foundation package you'll find 40 templates you can customize for your own forms requirements.