

Initial Setup

Following the successful installation of GraphixCALC Pro, you should invest some time customizing it to fit your needs. By investing this time up-front, you will maximize your investment through increased profits. Refer to the included HELP file for further clarification and details. Here is a suggested list of steps to perform prior to actively using the software in a production environment. It is not necessary to follow this exact order as it is merely a suggestion.

- 1) Make a backup copy of the database (Setup > Backup Database). This can be performed as often as desired.
- 2) Enter your Company information in the Company form (Setup > Company).
- 3) Enter Employee information, if applicable (Jobs > Employees).
- 4) Determine your Standard Shop Rate (Setup > Standard Shop Rate). Note that this only applies to the Shop Rate Pricing form, but is a very worthwhile exercise even if this pricing form is not used.
- 5) Review and modify the Time Factors as necessary to ensure the factors used accurately reflect your shop (Setup > Time Factors). Note that these only apply to the Shop Rate Pricing form.
- 6) If you are upgrading from GraphixCALC Pro 1.x, import your existing materials data (Setup > Import Legacy Data).
- 7) If you will be using GraphixCALC along with QuickBooks, import your Clients and/or Items (Setup > Import Clients/Items).
 - a) Review imported Clients and/or Items and modify data as necessary. Some Items may not be useful or necessary from within GraphixCALC, but are still used in QuickBooks. These extra Items can be safely deleted from GraphixCALC (Jobs > Clients, Setup > Edit Item Types).
- 8) Review all materials to ensure your actual material costs are accurately reflected (Materials).
- 9) Review all Factors to ensure that they accurately reflect the needs of your shop (Factors).
- 10) Review and modify as necessary the Company Messages which are used on Estimates and Invoices (Setup > Company Message).
- 11) Review all pricing forms and set the desired Default Values for such things as markups, commonly used materials, discounts, etc.
- 12) Make an additional backup copy of the database. This can be used as your baseline database in the event your working copy becomes corrupted (Setup > Backup Database).