

How to use the new features in 4.0

General on the ProfitCalc

- There are two ProfitCalc's in Profit Solver. Each ProfitCalc must be used in the correct situation for the ProfitCalc to work mathematically correctly. The service ProfitCalc is different than the product ProfitCalc.
- The product ProfitCalc is a straight line markup for products. The product ProfitCalc formulates the markup on profit based on the price you've entered
- The service ProfitCalc is not a straight line markup, it must cover non-billable and overhead in the profit markup. It has to adjust the markup applied to billable labor, non-billable labor, overhead, and profit.

Service based ProfitCalc

Use the "ProfitCalc Service Profit " on any service that has labor and/or equipment.

1. Enter in a price for the service, right click on the service name in the second column where all the services are listed.
2. A menu will appear and left click on "ProfitCalc Service Profit". (The ProfitCalc will mathematically adjust the profits to the exact same profit level.)
3. An alternative to the ProfitCalc would be when you want to set the inventory markup at a specific level and then adjust labor. You can always type in any profit desired and adjust the other profits to account for more profit in any area.

Product based ProfitCalc

Use the "ProfitCalc Product Profit" on any service that is just inventory.

1. Enter in a price for the service, right click on the service name in the second column where all the services are listed.
 2. A menu will appear and left click on "ProfitCalc Product Profit".
- The Product ProfitCalc will mathematically adjust the inventory as a straight line markup to the inventory item.

Understanding Subservices and calculations

- When you have a subservice, the profit level of the subservice does not change, when using the ProfitCalc button.
- For any service, to show one profit level for the entire service, the subservice must be broken out into labor, equipment, and inventory in the above reference areas.

Move feature

- In Profit Solver, when you create a **new category** you can now **move items into that new category**. You are now able to put items in the order you want. (ex. In the inventory module you may want to separate the vaccines into their own category. Simply create a new vaccine category and over the vaccines into the new vaccine category.)
- The move feature applies to employees, equipment, inventory, and services (items in the second column). Moving is a **drag and drop feature**. *Simply click on what you want to move in the second column and drag it to another category (In the first column). Like in Windows you can move more than one item at a time.*
- There are two ways to highlight multiple items.
 - Highlighting items in consecutive order.
 1. Left click on the first item to highlight, go to the last item in the range you want to highlight and Shift-click on the last item.
 2. This will highlight every item between your first click and the shift-click. (Click-Shift-Click)
 - Highlighting items in non consecutive order.
 1. Left click on the first item to highlight, go to the next item you want to highlight and control-click on the next item.
 2. You are able to control-click on multiple different items and then move them all at once. (Click-Control-Click, Control-Click, Control-Click)

Import / Export Feature – CSV standard

The import export feature applies to equipment, inventory, and services. Information must be stored in a CSV format (comma separated value). The fields in each module can be pulled from a CSV spreadsheet and into profit solver.

1. Click on file: import/export, for the import/export dialog box.
2. Select the file to import by clicking on the browse button.
3. Select the module you would like to put the data in.
4. Click on import or export to transfer data into or out of Profit Solver.

New Employee Features

Profit Solver will allow you to copy an employee into multiple services at the same time.

1. Select the employee you wish to insert into multiple services, by right-clicking on the employee and left clicking on "Copy Reference".

2. Go select the services (you can highlight multiple services) you want to insert the employee in, right click in the second column on one of the highlighted services for a menu and left click on "Paste Reference".
3. To apply a quantity (minutes) go back to the employee you selected, right click for a menu on that employee and left click on "Apply Quantity".
4. A dialog box will appear for you to type in a number of minutes. Type in number of minutes and the minutes will be applied to the services the employee was just copied into.

New Equipment Features

Profit Solver will allow you to copy a piece of equipment into multiple services at the same time.

1. Select the piece of equipment you wish to insert into multiple services, by right-clicking on the piece of equipment and left clicking on "Copy Reference".
2. Go select the services (you can highlight multiple services) you want to insert the piece of equipment in, right click in the second column on one of the highlighted services for a menu and left click on "Paste Reference".
3. To apply a quantity (units) go back to the piece of equipment you selected, right click for a menu on that piece of equipment and left click on "Apply Quantity".
4. A dialog box will appear for you to type in a number of units. Type in number of units and the units will be applied to the services the piece of equipment was just copied into.

New Inventory Features

Profit Solver will allow you to copy a piece of inventory into multiple services at the same time.

1. Select the piece of inventory you wish to insert into multiple services, by right-clicking on the piece of inventory and left clicking on "Copy Reference".
2. Select the services (you can highlight multiple services) you want to insert the piece of inventory in, right click in the second column on one of the highlighted services for a menu and left click on "Paste Reference".
3. To apply a quantity (units) go back to the piece of inventory you selected, right click for a menu on that piece of inventory and left click on "Apply Quantity".
4. A dialog box will appear for you to type in a number of units. Type in number of units and the units will be applied to the services the piece of inventory was just copied into.

An additional feature that Profit Solver allows, **is the ability to match up an inventory item to a service name and insert the inventory item into the service.** This allows you to match an inventory

item with a service, and automatically insert the inventory item in the inventory reference field for that service.

New Services Features

Profit Solver will allow you to copy service into multiple services at the same time (creating subservices within that service).

1. Select the service you wish to insert into multiple services, by right-clicking on the service and left clicking on "Copy Reference".
2. Select the services (you can highlight multiple services) you want to insert the service in, right click in the second column on one of the highlighted services for a menu and left click on "Paste Reference".
3. To apply a quantity (units) go back to the service you selected, right click for a menu on that service and left click on "Apply Quantity".
4. A dialog box will appear for you to type in a number of units. Type in number of units and the units will be applied to the services the "subservice" was just copied into.