fotoBiz® 2 - Tutorial

FotoBiz is about your images, your clients and paperwork. FotoBiz has many features but the primary function of the program is to help you keep track of your images, so you can make a sale. Then you need to get your paperwork done as quickly, accurately and professionally as possible so that you can get your assignment or stock submission to your client, so you can get paid.

The correct paperwork not only makes your job look professional, but it also helps protect you and your client from misunderstandings about what you are actually selling or licensing, and what your client is paying for.

If you want to make a sale you have to be able to find the image you want to send to your client. The imageLog in fotoBiz simplifies this process for you.

In this Tutorial you will learn how to:

- Navigate to most of the main sections in fotoBiz
- Create a Delivery Memo, then turn the Delivery Memo into a Quote. Then with the click of a button turn your Quote into a Stock Invoice.
- Create an Assignment Estimate, and then turn your Estimate into an Assignment Invoice.
- Create and run Reports, Lists and Statements.
- Stay in touch with your clients.
- Create a To Do list and schedule an appointment.
- Create a Mass Mailing.

Overview of this Tutorial

The purpose of this tutorial is to walk you through some of the main features of fotoBiz. The goal of the tutorial is to give you an understanding of the logic of fotoBiz, a general idea of how to navigate around in it. It is not meant to teach you about every feature in the program. The manual does this for you in much more detail and the Quickstart Guide will give you a good visual reference to use while learning the program.

This tutorial should take about one hour and a half to complete. This tutorial has fictitious sample data in it. When you are done with the tutorial you will be able to delete the sample data all at once in the Setup screen.

So use the sample data as much as you want to get to know how fotoBiz works. For some of you it may take months before you have enough of your own data entered to get a sense of how all of the reports and features work in fotoBiz. This is your chance to see just how much fotoBiz can do for you.

Important

Once you click the Delete All Sample Data button all of the sample data and any new information you entered during this tutorial will be deleted. Before you start to enter your actual data you must delete the sample data, but don't do that until you have gone through the tutorial. This tutorial is set up as a step-by-step teaching tool. We suggest that you don't get ahead of yourself and click on buttons or screens unless you are asked to do so in the tutorial.

The FotoBiz Main Screen

Lets look at the fotoBiz main screen. All of your jobs will start here with your client. You can find an existing client, enter a new client, or fotoBiz can import a group of clients from an external database.

FotoBiz is very easy to understand especially if you forget that it's a computer program and just think instead about the type of job you're trying to get done.

Once you have the client you want to work with, you simply select the type of job you're doing, and fotoBiz will lead you through the paperwork that you'll need to create for each step of your job.

The Main Setup Screen

To get into the Setup Main Menu screen click on the word Setup in the gray sidebar on the lower left of the fotoBiz Main Contact screen. Click the yellow Edit Company Information. You'll see our sample photographer, Russell Baker's company information entered here. This is where you will enter your information once the sample data is deleted.

Click Ok to go back to the Setup Main Menu. Click the red Letterhead & Logo Defaults. On the upper left hand side of this screen, click on the printer that you will be using. This is the screen you will come to when you want to import your logo. Click OK. Click the word Contacts in the left hand corner to return to the fotoBiz Main Contact screen. Now let's begin with your first job.

How to Handle a Stock Submission

Your client calls you and wants to see some of your photos. He wants to use one for a brochure. You want to send some images to the client along with a Delivery Memo. To create a Delivery Memo be sure that you are in the Stock section on the fotoBiz Main Contact screen by clicking on the green Stock button under the blue New Client button on the lower left side of the screen (You can click on the word Stock next to the button also). For the purpose of this tutorial we are going to use a client from the sample data.

On the bottom left of the screen there are a set of arrows. If you click the double arrow on the far right this will take you to the last customer in your database. The single arrows are for scrolling through your clients in the database one at a time. Now click the double arrows on the left to go back to the first customer, Jim Burger. If you had wanted to enter a new client you would have clicked the blue New Client button.

Jim Burger is the client who is requesting some stock images from you. Click on the blue New Delivery Memo in the upper right corner. Click OK in the pop-up window. You are now presented with a Worksheet to fill in. Here is what you need to know about this Worksheet that you will fill in from the top down:

Filling in the Worksheet

Type in a Job Title that's short and descriptive. This is important as it's used to identify the job in the List View and it's also printed on your forms. Let's use the title Southwest Landscape.

Tab to the next field and select a category from the drop down menu. Since we know Jim wants to use these images on a brochure select Advertising from the drop down menu. By choosing a category here you will be able to print a summary report based on the different categories to see where your work is coming from. You'll learn how to do this in the manual.

The client information has been filled in automatically for you.

Select a shipping method for your images (or it leave blank if it is a digital submission), client's PO and job information. We'll wait to learn about the RightsWriter™ for right now. Fill in all the fields like Description of Request, Negotiation Notes, Memo Message, License Fee Notes, Billing Instructions. If you click on the small gray question mark in these fields, you can find out more about them.

After you have filled out the top of the form, you can quickly get to the bottom of the Worksheet by clicking the white border on either side of the page. If you click the border on the top of the form you jump to the bottom, and if you click the border on the bottom of the form you jump to the top.

Entering Images As Line Items

Now enter the images you'll be sending to Jim Burger. In the large white box at the bottom of the Worksheet you can enter images on the Delivery Memo either in batches, 3 Southwest Landscape or individually using the Image Tracking Number that has been assigned to an image automatically in the fotoBiz imageLog.

We'll do some of each right now. On the first line, enter 3 (3 images are going Out to your client). Tab to the Type field and select from the drop down menu, Original 35mm. In the Description field enter Southwest Landscape. For the value of each enter $1,500 (a duplicate image would not have the same value). For the next image on the next line, enter the number 1. Tab to the Tracking Number and enter the tracking number 1017. When you tab to the next field the rest of the line is filled in automatically for you because this image is part of the sample data that we entered for you, in the imageLog,(You'll learn how to enter your own images in the imageLog in the manual). When the line is filled in you'll notice that there is also a Restricted notice on this image. In the imageLog you will be able to restrict any of the images you enter. Now on the third line let's enter 1 image with the Tracking Number of 1026, and again, the rest of your information will be filled in automatically because you used a Tracking Number.

Print the Delivery Memo

We now want to print out the paperwork that will go along with your submission. Your printing choices are on the middle left of the screen:
This Worksheet: Prints a copy of the filled in Worksheet for your records.
Pre-Delivery Fax: It is suggested that you fax a pre-delivery agreement to your client stating the more important details of your terms and getting them to sign and return it before you send them any pictures.
Cover Letter: A cover letter will be created automatically for you in the Communications section of fotoBiz.
License Seal: This is a letter that can be printed on a label that you'll seal your package with. Basically once your client breaks the seal they are agreeing to the terms listed on it.
Terms on Back: The terms from ASMP, APA and Editorial Photographers are included in fotoBiz. For now we'll use the ASMP terms that are the default in the program.
The Delivery Memo: This prints the delivery memo.

For the sake of time let's just print the Delivery Memo by clicking on the green Delivery Memo button. A pop up box will ask if you want to include the memo message to the client that you added on the Worksheet. Select Yes. Click Continue to print one copy. Now you get a pop-up box asking if you want to

Log this item (you will learn more about this feature in the manual). Choose Yes. You are then taken back to the Worksheet. Click on the red Contacts button in the middle left of the Worksheet to go back to the fotoBiz Main Contact screen.

Turn Your Delivery Memo into a Quote

So you've sent off the Delivery Memo and Jim Burger gets back in touch with you. He likes one of the images and wants a quote from you for using it on his brochure cover. Now you want to turn the Delivery Memo into a Quote. Make sure the contact name of Jim Burger is showing on the Main Contact screen and click on View Client's Memos in the upper right hand corner. If there is just one Delivery Memo for Jim Burger you will be taken directly to it. Otherwise, you are taken to a List View of all of Jim Burger's Delivery Memos. Select the Southwest Landscape, click on it and the Delivery Memo Worksheet will open. Click the green Quote/Invoice button on the middle left side of the Worksheet. This button will allow you to create either an Invoice or a Quote. Click Quote in the pop up window. Then click OK, this takes you into the fotoQuote main screen to create your Quote.

FotoQuote®

Pricing stock or assignment photography is about negotiation. Knowing an average price for a usage isn't very useful in itself. You need to know how to get that price. This is what makes fotoQuote special.

FotoQuote has a Coach section, it's an online guide that gives you market information and negotiating tips for each of the categories you'll be pricing.

Be sure and read the Usage Tip for the category you are pricing. Access the Coach by clicking on the word Coach in the gray sidebar of the main fotoQuote screen.

To select the category you are going to price click on the Advertising Tab at the top of the screen. Select Brochure from the list. For the Press Run choose 10k-25k and for the Image Size choose Front Cover. The average price of $1,307 is displayed with the price range directly below it. Click the Refine Usage & Add to Current Quote button. Enter the Image Tracking number for this sale, which we'll make 1023. Let's round the usage price out to $1300. Click on the green Add to Quote button. You can see this usage has been added to the current quote in the white box at the bottom of the main fotoQuote screen.

The RightsWriter™ and Print the Quote

Click the Print Quote button. Now you have the fotoQuote stock Worksheet in front of you. The job title and client information is filled in automatically for you. Now we are going to use the RightsWriter™. Click on the red RightsWriter™ button, which is in the middle right of the Worksheet and choose the rights you want to grant for this usage from the drop down menus. (Anything is fine for tutorial purposes). Click the blue Build button and then the red Return button.

Back at the Worksheet you can see the rights you are granting listed in the small white box above the RightsWriter™ button. Jump to the bottom of the screen by clicking on the white sidebar. On the middle left of the screen click on the green Print Quote button. Print one copy by clicking Continue. Click on the red fotoQuote button on the Quote Worksheet that takes you back to the fotoQuote main screen. Then click Return again and this takes you back to the fotoBiz Main Contact screen.

Turn your Quote into an Invoice

Some time passes and you hear back from Jim Burger and he agrees to the terms of your Quote. Be sure Jim Burger is showing on the fotoBiz Main Contact screen, and then click on the blue fotoQuote button on the right hand side of the screen. Click on Print Quote and the Southwest Landscape Worksheet will be on your screen. (If the quote you wanted to find wasn't the most current quote you would click on the green List button in the middle of the current quote Worksheet. Here is where you find listed all of the quotes you have created. You would just click on the one you want and be taken to it.) Click on the Make Invoice button in the print options area to the left of the Worksheet to turn this Quote into an Invoice. Click OK from the pop-up window. This takes you to the Stock Invoice Worksheet.

Most of the information you need will be filled in automatically for you from the stock Quote. Fill in any additional information you want on the invoice. Go to the bottom of the page. Click the green Print button on the bottom left of the screen to print this Invoice. To go back to the fotoBiz Main Contact screen, click the Return button from the Stock Invoice Worksheet screen and Contacts from the pop up window.

You've just completed an entire submission process by filling out just one worksheet, clicking a few buttons, and making a few adjustments as you needed to. Assignments in fotoBiz work the same way, from your original estimate through your completed invoice.

How to Handle an Assignment Estimate and Invoice

Now a client of yours, Mary Feldman, calls and wants you to shoot an assignment for her. Be sure that you are in the Assignment section on the fotoBiz Main Contact screen by clicking on the green Assignment button. To find Mary Feldman in your contact list, click the blue Find button on the lower left of the screen, enter Mary in the first name field at the top of the screen. Then Tab to the last name field and enter Feldman. Click the red Find button on the lower left of the screen. You'll be taken back to the Main Contact screen and Mary Feldman will be the client displayed.

Now click on New Assignment in the upper right of the screen. Click the Estimate button from the pop-up window. An Assignment Worksheet is ready for you to fill out. Let's create the Job Title, Paris Nightlife. Next select a category for this assignment from the drop down menu, this time we'll make it Editorial. Select the shipping information, Client PO, Client job information, and notes about the request and other items on the form that are useful to you. We will be charging a Creative Fee and a Usage Fee so we need to click on the RightsWriter™ to create a license agreement that you are basing your Estimate on. We talk about pricing your assignment using this method in the Assignment Coach section of fotoQuote, so you can read more about this on your own. Once in the RightsWriter™, select some terms from the drop down menu, click Build and then click Return and you are back in your Assignment Worksheet.

If you wanted to add a more detailed description of your job use the DescriptionBuilder feature. The DescriptionBuilder lets you store and recall templates for different types of job descriptions. Again you can learn more about this feature in the manual.

Entering Line Items on the Assignment Worksheet

At the bottom of the Worksheet let's choose some line items. In the white box at the bottom of the page, move the cursor to the Qty (Quantity) column. Enter the sample items below (for now just use the items from the drop down menu that we have already entered. The manual will tell you how to change these to suit your needs):

1 Air Fare @ $700
2 Creative Fees Editorial @ $500 Per Day
20 Film-35mm Color Slide @$16 each
1 Usage Editorial Magazine (see below for how to enter price here)

To get the price for your Editorial Magazine usage, click on the small blue FQuote button to the left of the line items. This takes you to the Assignment Pricing screen in fotoQuote.

Click on the Editorial Tab and select Magazine Editorial Consumer from the list. Choose 1-3 million for the Press Run and Full Page for the Image Size. The average price is $826, displayed in the upper right hand side of the screen. The price range for this category is listed just below this. Click the Copy Price button on the lower left of the screen to copy your price to the clipboard. Click OK from the pop-up box and then click Return at the bottom left of the page. Click Last from the pop-up window and this takes you back to the current Estimate Worksheet you're working on. Move the cursor to the Price column by the usage you are pricing; now you can paste the price you copied for the Editorial Magazine Consumer usage by going into Edit on your tool bar and clicking Paste. You also could have just entered the price manually but this technique will come in handy when you are pricing a few usages at the same time.

Print the Estimate

Now we are ready to print out our Assignment Estimate. To the left of your line items are the buttons for your printing options. Many of your printing choices are the same as on the Stock Worksheet: This Worksheet, Cover Letter, Terms-Back. Let's click on the green Print Estimate button. You can print a summary or detail of your Estimate. Select Detail from the pop-up window. Click Continue to print it. Select Yes from the pop-up window to Log this item. Click the Contacts button on your Assignment Worksheet to go back to the fotoBiz Main Contact screen. You will see a log of transactions by clicking on the Log Tab under your client's contact information.

Turn your Estimate into an Invoice

You have sent off your Estimate and your client hires you for the job. Now you want to invoice the client. From the Assignment Main Contact screen, find your client, Mary Feldman again. Click View Client's Assignments in the upper right hand corner of the screen. If only one Estimate exists for this client you will be taken directly to it, otherwise, select the Paris Nightlife estimate from the List View. At the bottom of the Estimate, click the green Invoice button on the left side of the screen. Click OK in the pop-up windows. You'll instantly have a completely filled out Assignment Invoice. Click on the green Print button to print the Invoice. Select Summary or Detail from the pop-up window. Once it is printed, click the red Return button on the Assignment Estimate and Contacts from the pop-up window to go back to the fotoBiz Main Contact screen.

How to Run Reports, Lists and Statements

All of the fotoBiz lists and reports are available from the List View of each module. The information below gives you a good overview of some of the List views, reports and statements. There are other reports and lists in fotoBiz, which you will learn about in the manual.

Contact Lists and Reports

First, to be sure all your contacts will be listed on your reports click on the green All button on the control panel at the lower left of the Main Contact screen. To view a list of contacts click the List button that is located next to the All button in the control panel. Once you are viewing a list of contacts you can manipulate the list in several ways. On the top left of the screen is a set of arrows. The double left and right arrows will take you to the first and last customer in the list. The single up and down arrows will take you to the previous or the next page in your list if it is more than one page long. You can sort your contacts by Company, Name, State, or Zip code. Click each one now to see how the list changes with each choice. You can run reports for your contacts from this screen also. Along the top of the screen you have a choice of Contact List, Phone List, Diary Pages, Mailing Labels or a Summary report. Again click each choice to see the different reports available to you. Click Return to go back to the Main Contact screen.

Delivery Memo Lists and Reports

Click on the green Stock button on the Main Contact screen. Click on View All Memos in the upper right. This list screen shows all of the Delivery Memos in the group you are working with. Click the Open and Closed buttons in the upper left button group to show only those memos. Open means that not all of your images have been returned. Now click on Show All Memos. You can sort your list by Reverse (which shows the newest memos at the top of the list), Date, Company, or Job. Click each of these choices to see what they do. Now let's run a report of our Delivery Memos by Company. Make sure all your Delivery Memos are showing by clicking on the Show All Memos button on the upper left of the screen. Then click the Memos by Company button along the top of the screen. Don't enter a date so all of your Delivery Memos will be shown in the report. Click Continue on the left of the screen to print out the report. You could also run a report of Memos by Category, by clicking that button along the top of the screen. Click Contacts to go back to the Main Contact screen.

Statements and Receivables

Click on the green Billing button on the Main Contact screen. Now click on the Statements button in the middle right of the screen. The Statements screen shows you a list of all customers who owe you money and how much they owe you. Click on the small printer icon on one of the lines to print out a statement. Click the envelope icon to print an envelope. Click Contacts to go back to the Main Contact screen.

From here click on the Receivables button right under the Statements button. The Receivables screen shows a list of all open invoices. It shows the days since the invoice was created, the invoice total, payments made, and the total currently due. Just like in the other List views you can sort this report by ID#, Reverse order, Date, Company, or Job. Click each of these choices to see how it changes the report. Print out one copy of the report by clicking Print in the upper right hand corner. Click Contacts to go back to the Main Contact screen.

Staying in Touch with Your Clients

We believe that clear consistent communication with clients is one of the main keys to success. Thanking the writer who aided you on assignments may get you recommended the next time the writer gets an assignment. How many Photo Editors have you written thank you letters to after they pushed to get a bit better placement for your images and otherwise stuck their neck out on your behalf? A phone call is not the same, and neither is email in some circumstances. For the people who care about photography, this is a business of personal relationships and mutual trust.

For the busy photographer, who has little time to write, the Communications section of fotoBiz makes keeping in touch with your clients easy and professional.

The second benefit of consistent communication is the stating and restating of your terms of doing business. It's possible that the current barrage of harsh terms appearing from many photo buyers are in part due to photographers not clearly stating their own terms with every job.

From the Main Contact screen choose the client you would like to write to. Let's do a Find for Stacey Hughes. Now in the gray sidebar click on the word Write to enter the Communications screen. When you first arrive at this screen you are presented with a blank letter. Let's choose a letter template from the drop down menu. Click on the box that says Letter-Blank. Choose Lost or Damaged Slides, Friendly and modify the text to suit your needs. You can print your letter as a letter, fax, form or select email to paste the letter into your email program. You can also print an envelope and shipping label from here. Let's print this one as a Letter. Click on the gray Letter button at the bottom left of the screen.

From this screen you can also create new letter templates and view the history of the letters you have sent to clients. Please read in the manual for details on these features. Now click on Contacts to go back to the Main Contact Screen.

The Calendar Section

Click on the word Calendar in the gray sidebar on the left of the Main Contact screen. The Calendar section lets you view your contacts via a daily, weekly or monthly view.

You can schedule your items within the Calendar screen itself by clicking on the New Item button on the top left of the screen. Fill in the time, activity and description of the task. You can also schedule an activity from the Main Contact screen. The advantage of scheduling from the Main Contact screen is that the event will be linked to the contact in the Calendar section. Read the manual for more details on this feature.

Create a To Do List

You can create a To Do list from the Calendar section. Click on the New To Do button. Choose the priority level from the drop down menu, and then enter in your To Do. If you wish to delete what you have entered click on the small trashcan on the right. To view your To Do list click on the View To Do List in the gray bar on the left. From this screen you can choose:

Show All: View all of the To Do lists that you have entered.
Show Active: Shows only the To Do list of To Do's that have not been completed.
Show Completed: Shows you all of your completed To Do's.
New To Do: Create a new To Do list from this screen.

There is also a button on the screen to Delete Completed To Do's all at once. This is also possible to do by clicking on the Clear Completed To Do button in the gray sidebar of the main Calendar screen.

Printing the Calendar

You can print out a daily, weekly or monthly view of your schedule. Click on the small printer icon on the lower right hand side of the screen. You can also print out a blank monthly planner.

To print out your To Do list, click on the View To Do list in the gray sidebar and click the Print button from this screen.

Mass mailings

One of the best uses of technology is to have a website to display images to your clients. You need the website to show your images and you also need a way to get your clients to go to the website to see your work.

If you send mass emails, your email will probably end up in the client's Junk box. If you create mass mailings and send beautiful postcards, your client may hang that postcard on their bulletin board and you are the first person they will think of when a job comes up.

The process of sending a direct mail campaign to your clients is automated in the Mass Mailing section of fotoBiz. You can get in touch with clients and notify them about your website and schedule a series of mailings to a selected group of clients. This is a powerful feature in fotoBiz and one you should take advantage of.

To get to the Mass Mailings feature, click on the Mailings Tab at the bottom of the Main Contact screen. You will see a history of the mailings displayed in the small box and to the left is a Mailings button. Click on this. You are now in the Mass Mailings screen.

Let's create a mailing via email for all your clients in New York. Click on Find Clients and enter NY in the State field. Click Find. Then click on the Copy Email button in the upper left of the screen. The date of your mailing is entered automatically for you. Enter a description of your mailing. Let's choose Post Card 1. Now let's schedule a follow up mailing by entering 14 in the Days until Next Mailing field. Click Continue. Now the email addresses for this found group of clients in NY have been copied to your clipboard. Paste these addresses into a Blind Carbon Copy address header in your email program to send an email to all members in this group. Use your own email address as the Send To. By putting your list in the BCC field your clients do not know whom else you are sending this mailing to.

Back on the Mass Mailing screen all of the clients in your found list now have a red dot next to them showing that a mailing has been scheduled.

What Next?

This short tutorial will get you started using fotoBiz. Once you feel comfortable using the program and are ready to start entering your own customers, BE SURE TO DELETE THE SAMPLE DATA FIRST! You do this by going into the main setup screen. There are complete details in the manual. Good luck and may your business be more profitable and fun to run using fotoBiz and fotoQuote.

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