fotoBiz®

Business Management Software for the Freelance Photographer
with fotoQuote Pro built-in

Cradoc fotoSoftware

fotoBiz®/fotoQuote®
Users Guide
Version X
For Mac and Windows

IMPORTANT NOTE: The Cradoc Corporation, Cradoc Bagshaw and anyone associated with fotoBiz and fotoQuote are not in any way giving you legal advice.

All examples in this program are for informational purposes only. Even the terms and conditions that are from various national photographic organizations may have legal aspects that might vary from State to State. In all cases, to best protect yourself legally you need to show the terms and letters you plan to use to a lawyer and make any changes to match your specific situation.

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What is fotoBiz?

Welcome to fotoBiz X. FotoBiz automates the most time-consuming tasks that a freelance photographer faces in running a successful business.

FotoBiz helps you coordinate your transactions with your clients, and generates the necessary paperwork that you'll need to submit with your jobs. FotoBiz keeps track of your gear, automates client communications, keeps track of which images are making you money, and which aren't, and helps you profit from licenses that are about to expire.

You need to get your paperwork done as quickly, accurately and professionally as possible so you can get your assignment or stock submission to your client and then 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're actually selling or licensing and what your client is paying for. The RightsWriter™ license builder built into fotoBiz makes this easy to do.

FotoBiz also comes bundled with fotoQuote Pro 6, the industry standard guide for pricing stock and assignment photography. FotoQuote is the most powerful pricing and negotiating program you can use to increase your earning power. By studying the negotiating techniques outlined in the fotoQuote Coach, and applying the principles when you negotiate, you'll discover you can earn much more than you thought possible for your photos.

Negotiating skills are the most important skills you can learn in addition to your photography skills. Good negotiators can dramatically increase their income, if you have poor negotiating skills you lose money on every job you bid. FotoQuote takes you step-by-step through the process of determining your price, and then gives you tips on how to convince your client that the photo is worth the price you're asking.

Creating reports is a button click away. Create Statements and Receivables reports. There's a feature in fotoBiz where you can search for licenses set to expire within a certain time period. This valuable feature helps you quickly create an email to your client to remind them the license is about to expire and give them the option to renew it. This can be a good source of revenue with little effort on your part.

There are over 35,000 photographers worldwide using software that I've developed. I never expected that. In the beginning I was a photographer who saw the possibility of using a computer to make my life and work easier. All of the software that I've developed was written to solve problems I had in my own photo business. It seems that the problems I needed to solve were problems that many of you needed solved as well. I attribute the success of my software to this.

I wrote the Cradoc CaptionWriter to caption slides, the fotoKeyword Harvester to help me keyword my images and fotoQuote to price photos, but the software I needed most was an easy to use business management program; that's why I created fotoBiz. Other business management software has been available, but most are either simple bidding and invoicing programs or are based on a studio management or commercial photography model, but I'm a freelance photographer. Unlike a commercial photography studio, I don't have an employee to run my entire business through a computer program, and I don't have the time to do it myself. At the same time I need to be responsible about the paperwork I send out with my jobs. I want to know where my money is coming from, and I want to stay in touch with my clients.

The over-simplicity or over-complexity of the other programs convinced me that if I were going to get what I needed I would have to do it myself. I took my time writing this fotoBiz X update because I wanted to get it right. I believe what I've created is a program that fits the freelance photographer like a glove.

FotoBiz X gives you the tools you need to get paid fairly and excel in your business.

Good luck!

Cradoc Bagshaw

Installing fotoBiz

Software Requirements
Please see the support section of our website for the most updated system requirements.

Note: Windows users must have Quicktime installed in order to work with graphics. Download it for free at www.apple.com/quicktime

Installation for Mac
For best results, turn off all anti-virus software before installing.
- Insert the fotoBiz CD/DVD into your CD/DVD drive or download the software from the Internet to your desktop and unzip it. In some cases your browser may automatically unzip the file.
- Double-click the "install fotoBiz X" package icon.
- Follow the installation instructions.
- After installing, navigate to the Applications folder on your computer and locate the fotoBiz X program folder and click the fotoBiz X application to launch the program.
- For easy access to the program, you can drag the fotoBiz X application to your dock.

Installation for Windows
For best results, turn off all anti-virus software before installing.
- Insert the fotoBiz CD/DVD into your CD/DVD drive or download the software from the Internet to your desktop and unzip.
- Double-click the" Install fotoBiz X" icon.
- Follow the installation instructions.
- To run fotoBiz double-click on the desktop shortcut with the fotoBiz camera icon.

Backing Up fotoBiz
You must back up your fotoBiz data on a regular basis! We can't say this enough. In this version there is a backup button to simplify this process for you. You'll find it in Setup under Settings & Defaults in the Global tab.

You can set the backup counter to remind you to backup your software. The default setting is every time you exit the program. Under Setup>Settings & Defaults Global you will be able to set this reminder to a timeframe that works best for you. The backup will include only the fotoBiz data files. FotoBiz will automatically name the folder with the date and timestamp of the backup.

You are also able to identify the location of where you'd like the fotoBiz backup folder saved. The default setting will be your desktop, but by selecting the path in the Backup Folder field you will be able to select a new backup destination.

Backup often and save the entire backup folder to multiple CD's or external hard drive. It is also a good strategy to keep some older backups in case your program becomes corrupted from a crash and you don't discover the problem immediately.

We cannot offer any support if your computer crashes and you do not have a current fotoBiz back up!

Reinstalling fotoBiz From a Backup

There are a few ways in which you can restore your data. They each handle your data differently so be sure to read the options below carefully to determine which solution will work best for you.

Restoring From a Backup
This option should be used when significant data entry errors are made or in the case of data corruption. To restore from a backup, use the "Import from FBX Backup" feature that is built into the program. From the main Contacts screen select Setup from the menu on the left, then from the menu bar at the top select File and choose "Import Data from FBX Backup".

Navigate to your most recent fotoBiz X backup and select "Choose" to complete the process. Your data as of the date of the backup should now be restored. With this option there is no need to reinstall the entire program.

Computer Crash - Reinstalling and Manually Restoring From a Backup
Use this option when a computer crash results in the loss of the program AND you have backup files that have not been affected by the crash. To ensure you have a backup to restore from we highly recommend that you save your fotoBiz X backups to external media storage devices.

To begin, install a fresh copy of the program as you normally would. Use the original installer file if you saved it or contact us for a new download link. From your latest fotoBiz X backup folder select the files, FBData.fbzx and FBMain.fbzx, copy them over to the clean version you just installed and select REPLACE. This will preserve your data as well as any list customization you may have done.

Reinstalling
This option will primarily be used to install minor maintenance releases as directed by Cradoc fotoSoftware. In this case a download of the program will be issued to you and a reinstall of the software conducted. There is no need to delete or deactivate the existing copy, simply run the installer and it will automatically install over your current version making the needed updates while preserving your data.

Activating and Deactivating fotoBiz

Registering and Activating Your Program
The first time you run fotoBiz, a dialog box appears for you to register and activate your copy of fotoBiz. If your computer is connected to the Internet, then select the Internet Activation option. After selecting the Internet Activation option, you will be prompted to enter your first and last name and your personal fotoBiz serial number. Your serial number is located on the invoice that you received with your program or via the email sent to you if you downloaded it from the Internet.

The activation process will be initiated the first time you launch fotoBiz. Online the process takes just a few moments. Follow the steps outlined in the dialog boxes to activate your software. Activation ensures that you and/or your organization have a genuine copy of our software. It helps protect Cradoc fotoSoftware from unauthorized distribution of its software.

The only information we receive from your computer during activation is your computer's ID. We attach that ID to your name and serial number in our records so we can keep track of your activations should you need assistance in the future.

Write your serial number number on your CD with an archival marker, print the email with the number for future reference, or backup your download onto a CD and write the serial number there.

We offer free support, but looking up lost registration numbers was becoming a real problem. There is now a fee for replacing lost registration numbers. Write your number on your CD or backup for future reference!

Deactivating and Uninstalling fotoBiz
You are permitted two activations. You can transfer an existing activation to another computer by first deactivating the software on your current computer. This is done by selecting fotoBiz X from the file menu and choosing "Deactivate". This requires an active internet connection in order for your records to be updated automatically allowing you to then activate the software on your new computer.

If you are also migrating data from your old computer to your new one, do not deactivate the software on the old computer until after the migration is complete. You do not want the deactivation information to be copied over with your data.

Once the deactivation is complete, it is safe to uninstall/delete the program from your computer.

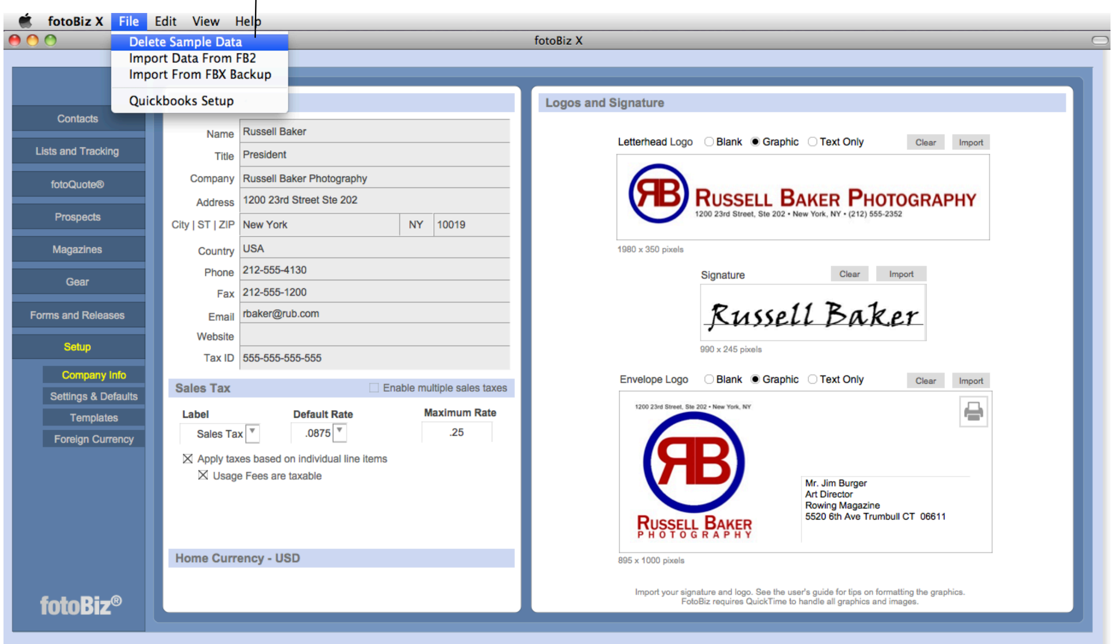
Technical Support
Technical support is available to registered users of fotoBiz. We are a very small company and the only way we can continue to provide you with free support is if you do your share of the work first. Please read through the manual carefully. We ask that all support questions be emailed to us at support@cradocfotosoftware.com. This is the quickest way for you to get an answer to your question.

If you're a new user and are having a problem installing fotoBiz, and you've read and followed the installation instructions, call us at 360-945-1380. We'll help you get your program running.

Setting Up fotoBiz

Deleting Sample Data: The sample data included in the program is designed to give you the opportunity to view various types of entries. We encourage you to experiment by adding a variety of test records. Exploring the program first with the sample data will increase your learning curve when it's time to enter your own real time data.

Go to Contacts then Setup>Company Info and select Delete Sample Data from the File menu



For those who are upgrading, the interface for fotoBiz Pro X is different from previous versions. Before you import your historical data, become familiar with the new intuitive design first by experimenting with the sample data.

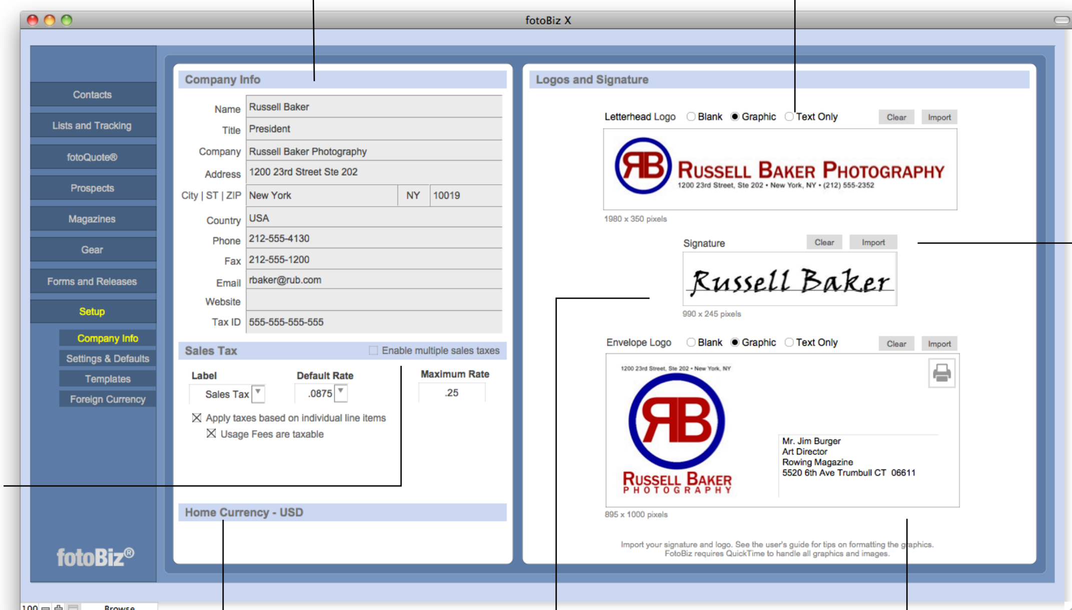
When you're ready to delete the sample data go to Contacts and select Setup. From the drop-down menu select Delete Sample Data. After you delete the sample data one time, we turn off the ability to do it again. If you don't delete the data in the above way, the delete button remains active, which puts your real data at risk in the future.

Entering Company Information

Company Information: Under Setup, select the Company Info button. Put in your name and address as you want it to appear on the various fotoBiz documents. If the company info for Russell Baker is still showing then you have not deleted the sample data (see the section above for details). Enter your default tax rate underneath your Company Info.

Enter your Company Info here

Select how you want your company info displayed



Enable the multiple sales tax option for countries with a dual tax system. Or use this feature to track State, County or City taxes in the U.S.

Select the Import buttons to import your logo and signature graphics

Your home currency is selected as part of the steps in deleting the sample data

Digital Signatures are used on Assignment Estimates, Stock Quotes and Delivery Memos

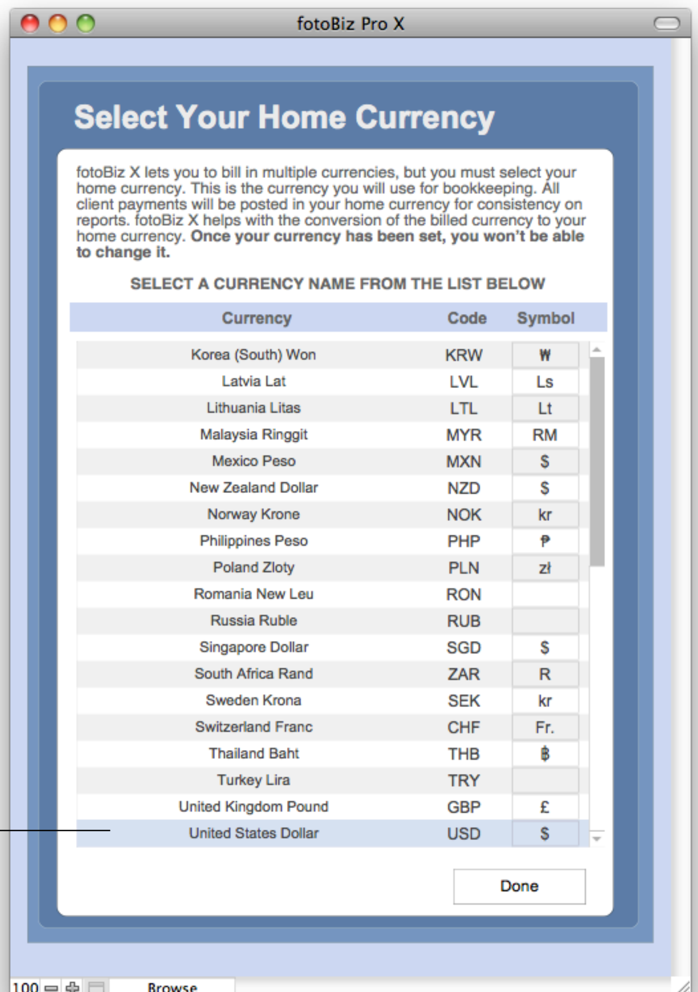
To create an envelope for someone who is not a client or prospect, type their info here and select the printer icon

Logos: If you're using pre-printed letterhead, check Blank to omit the logo from your documents. Select Graphic to use an imported graphic on your documents. With Text Only, we'll use your Default Company Information to put together a simple text header for you.

Import a scanned logo or digital signature in the appropriate field by selecting the gray Import button. FotoBiz uses Quicktime to work with graphics so if your logo is an EPS or other vector graphic you'll need to rasterize it (Photoshop will do this for you). You can also export a TIFF or JPEG from Adobe Illustrator. JPEGs must be RGB to display correctly. TIFFs can be RGB or grayscale. We have templates for sizing your logo available in the support section of our website (www.cradocfotosoftware.com/support).

Currency Setup

Currency Setup: In this version of fotoBiz you'll be able to identify the currency in which you wish to run your business. Once this is done, it cannot be changed. While you'll be able to bill in multiple currencies, for accounting purposes you'll only be able to run your business with one currency. For example if you run your business in U.S. dollars and need to create an invoice in Euros, you'll be able to do that, but for reporting purposes the amounts will be converted to U.S. dollars. This ensures that all of your reporting is in one currency.



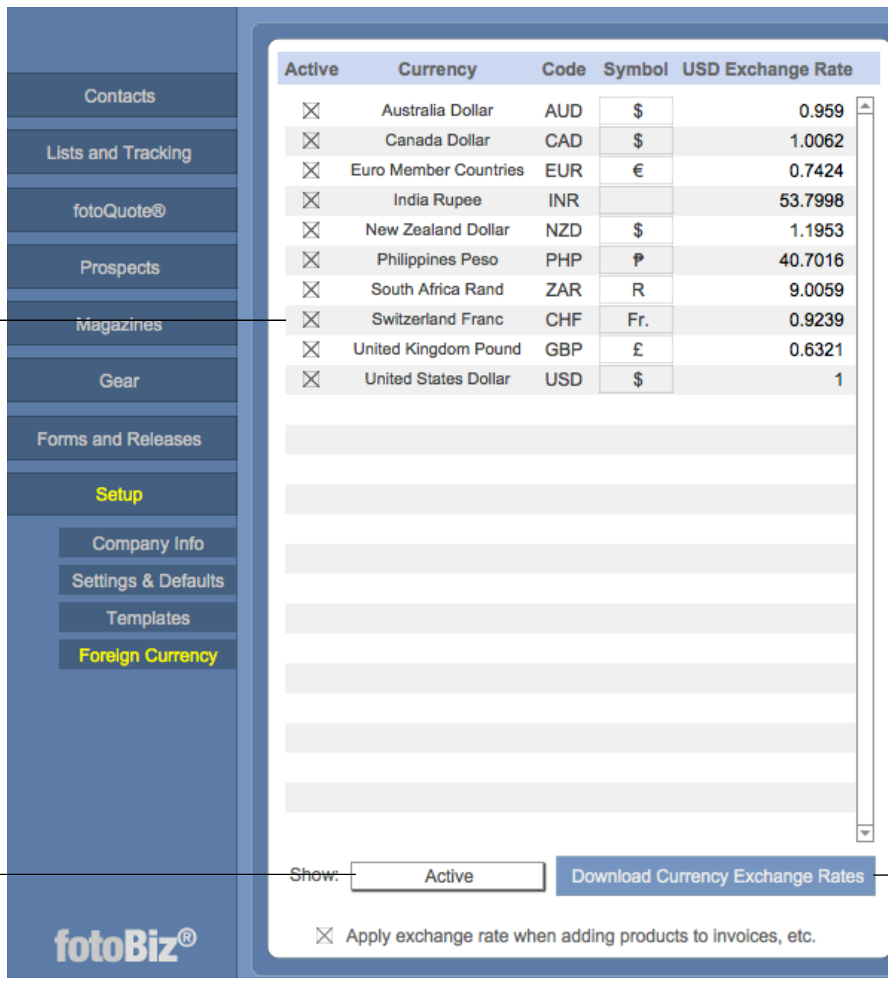
Make your Home Currency selection and then click done

As part of the process when deleting the sample data, you'll be asked to identify a Home Currency. You'll be able to choose one of the 34 currencies currently tracked by the European Central Bank.

Foreign Currency

Managing Foreign Currencies: You have the option of selecting your preferred currencies. When the Show button is set to Active these will be the currencies that are displayed as opposed to all 34 currencies. Only one currency can be assigned to each contact so if you have a contact that needs to be billed in two currencies you'll need to enter a separate record for them. To set the currency for a new contact select Contact from the file menu and choose Set Currency.

Mark your preferred currencies as Active, then select Active from the Show field to view just those currencies



From the Show field you have the option to view All currencies or only those you mark as Active or Inactive

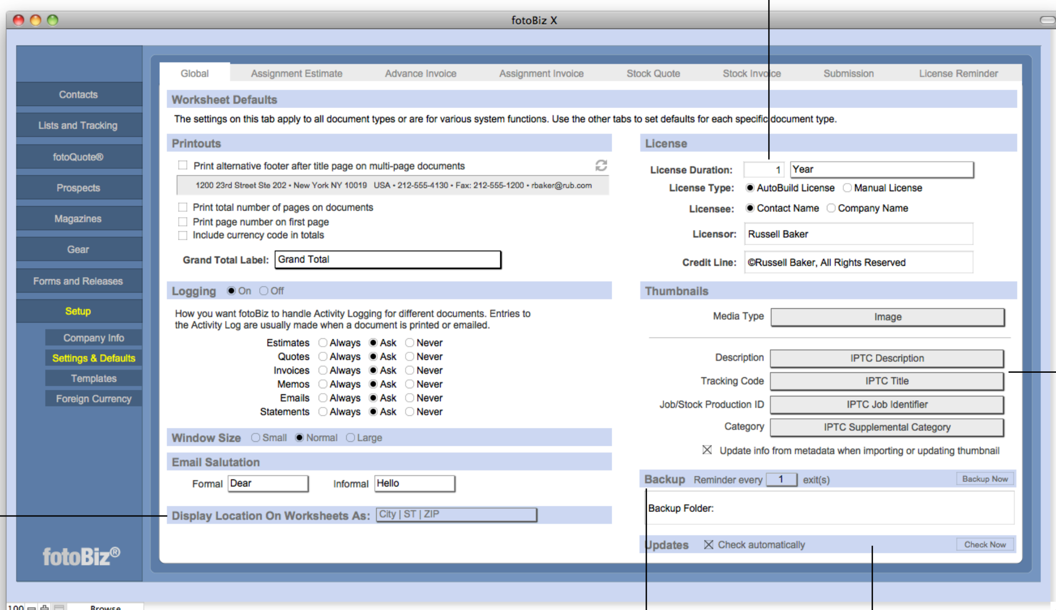
Automatically update the currency exchange rates by selecting this button

Hint: You can change the currency code for an existing contact as long as there are no transactions associated with that client. You can do this by going to the menu bar and selecting Contact > Set Currency. Only the Active currencies will display as options for setting currencies for contacts.

Settings And Defaults

Settings & Defaults - Global Tab: The settings on this tab apply to all documents or various system functions. Select how you want things like page numbers displayed on your documents. Use the other tabs to set defaults for those specific document types. The default license duration in fotoQuote is one year unless otherwise stated by the criteria or the usage tip.

Set your default license duration and fotoBiz will automatically calculate the expiration dates of the licenses you grant. This can be edited as needed directly on the stock or assignment documents



Change these field titles to match your region

Determine here what type of data you want to have entered automatically when you import your thumbnails. Thumbnails can be imported onto your Stock Quotes, Invoices and Delivery Memos

Set the backup counter to remind you to backup your software

When selected updates will automatically be checked monthly

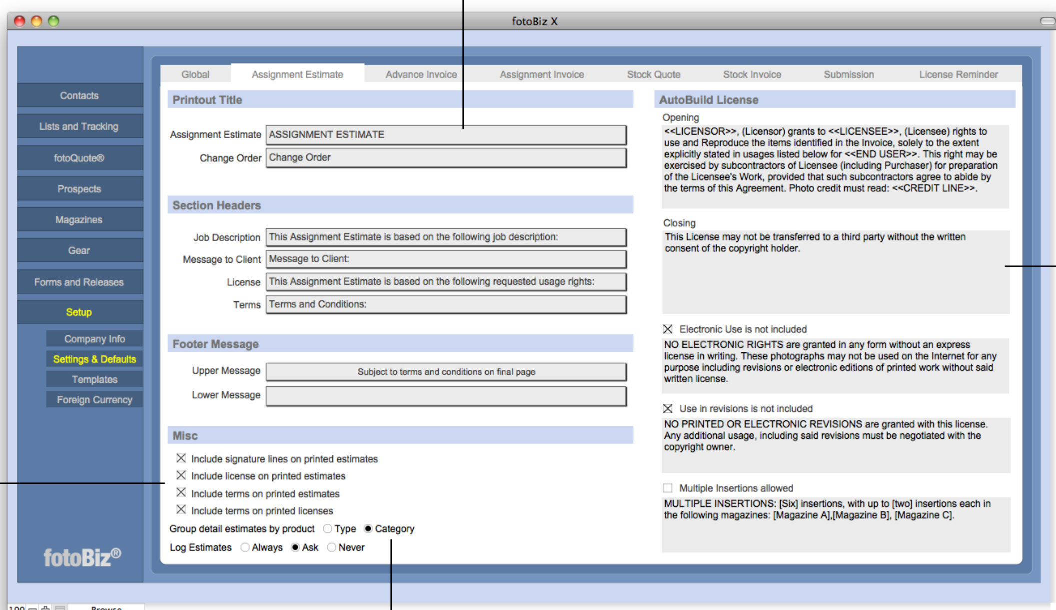
Backing Up fotoBiz: You must back up your fotoBiz data on a regular basis. We cannot offer any support if your computer crashes and you don't have a current fotoBiz backup. In order to save space, the backup will include only the fotoBiz database files. FotoBiz automatically names the folder with the date and timestamp of the backup. You're also able to identify the location of where you'd like the fotoBiz backup folder saved. The default setting will be your desktop, but by selecting the path in the Backup Folder field you'll be able to select a new backup destination.

Thumbnails: FotoBiz can create thumbnails from many of the common files formats such as JPEG,TIFF, and PSD. Thumbnails can also be created from some RAW, DNG, and PDF files. Large files will take longer to process.

Document Setup

Settings and Defaults - Assignment Estimate Tab: Many of the headers and default text on your documents can be customized to meet your specific needs. Click into the gray text boxes on the left to see a list of options or select Edit to add your own. These will be your default settings for all assignment estimates you create. You'll also be able to make changes to many of these fields on each individual document on a case-by-case basis without having to change your default settings.

Make selections from these drop-down menus to customize the content of your document



Create custom licensing terms and conditions that print on all of your assignment estimates

Customize the layout of your document here

Choose how you want the line items grouped on your detail assignment estimate

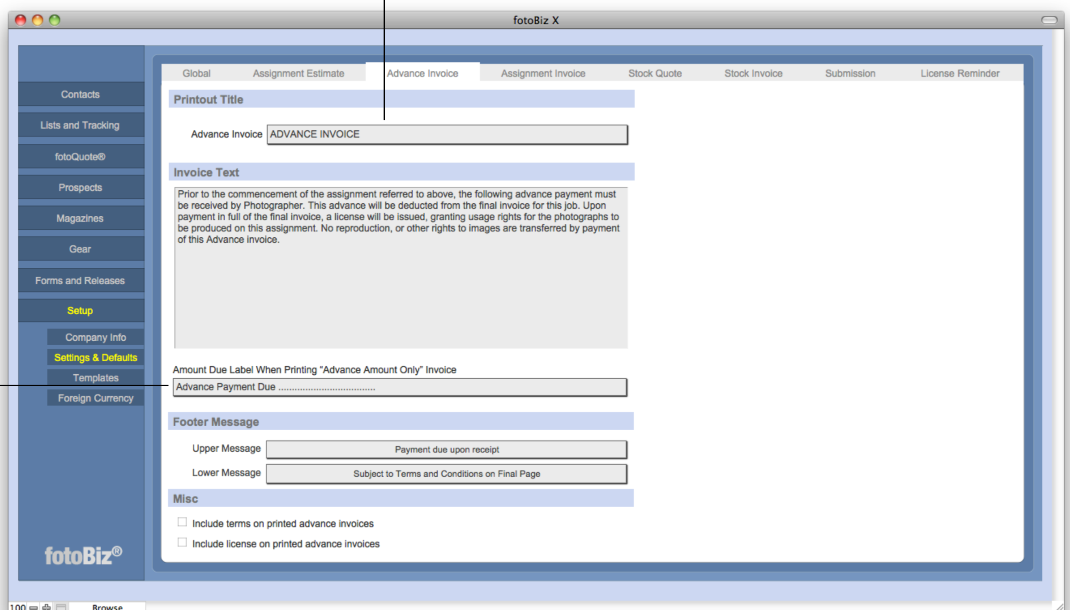
Hint: Grouping line items by either Type or Category only applies to the Detail print option for assignment estimates and invoices.

Document Setup - Continued

Settings and Defaults - Advance Invoice Tab: Many of the headers and default text on your documents can be customized to meet your specific needs. With the exception of the Invoice Text box, clicking into the gray text fields will produce a list of options for that header. To make changes select Edit to add your own. These will be your default settings for all advance invoices you create.

Make selections from these drop-down menus to customize the content of your document

Select what you would like the payment line item to say

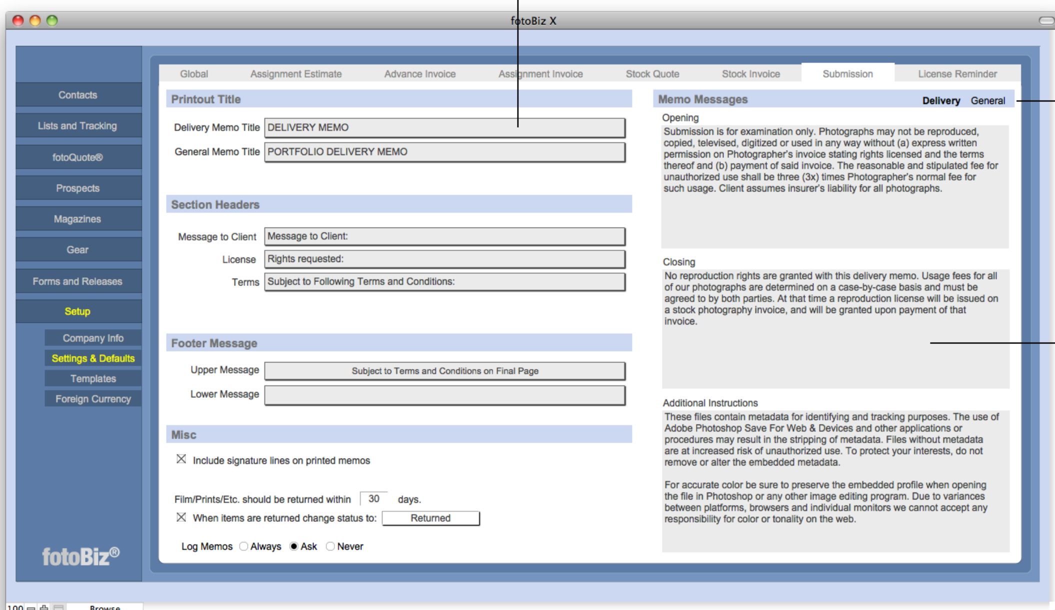


Hint: The information from an Advance Invoice is not entered into the payment sections of fotoBiz, such as receivables or the reports. The sole purpose of the Advance Invoice is to let you collect deposit payments before an actual invoice exists for this job.

Document Setup - Continued

Settings and Defaults - Other Document Settings & Defaults: The remaining tabs for Assignment Invoice, Stock Quote, Stock Invoice and Submission are all very similar each with several drop-down menus from which you can make your own selections. To add an item to the drop-down menu, click on the field and select Edit. This will allow you to customize the various headers and messages for each document.

Make selections from these drop-down menus to customize the content of your document



For submissions make your selection of Delivery or General

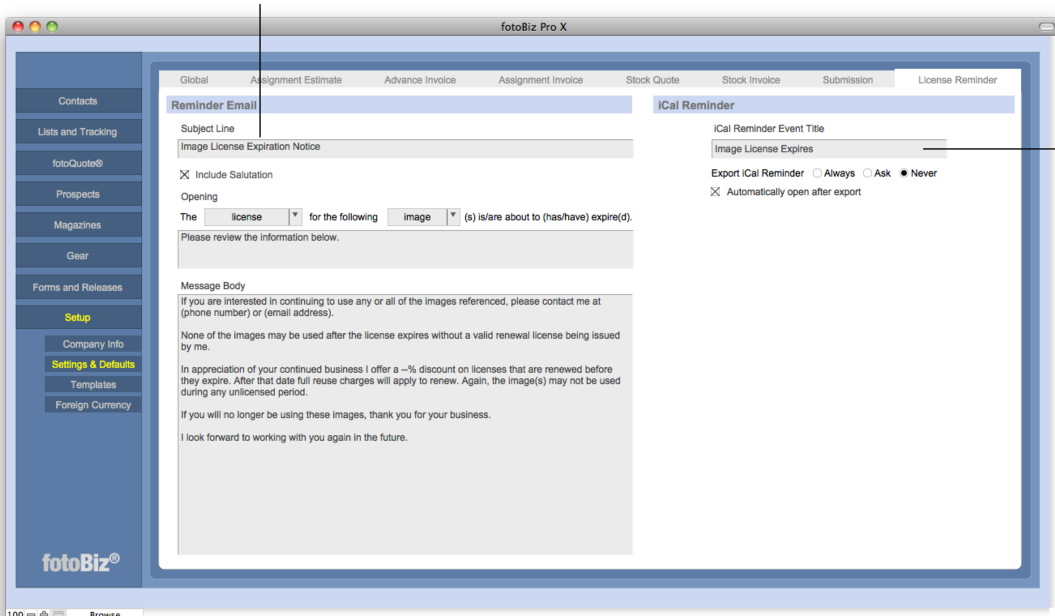
Create custom messaging that prints on either your Delivery or General Memo

On the Submission tab select Delivery or General to the right of the Memo Messages section to set you default text for these two types of submissions.

Document Setup - Continued

License Reminder Tab: For your license reminders, you'll be able to create a default email message that will be generated for you automatically when you select the envelope icon in License Tracking. The settings for the License reminders you can import into your iCal or other calendar are also managed from the License Reminder tab.

Create your default email messaging for the license reminders you send to clients



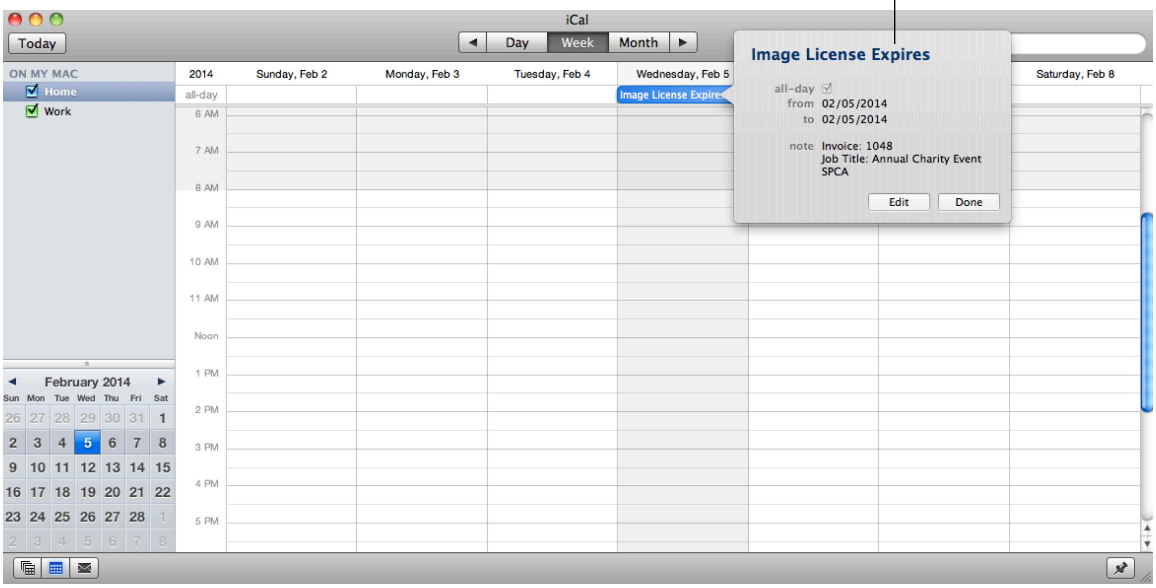
Select your iCal settings here

When fotoBiz X is delivered to you, the export reminder feature is turned off. To enable it, choose your setting to "Always" export the reminder or to "Ask" you each time by selecting the appropriate radio button.

Document Setup - Continued

License Reminder: The iCal Reminder will create a file that can be imported into iCal, Microsoft Outlook and Google Calendar. This way you'll have a reminder of expiring licenses, a great source of additional revenue.

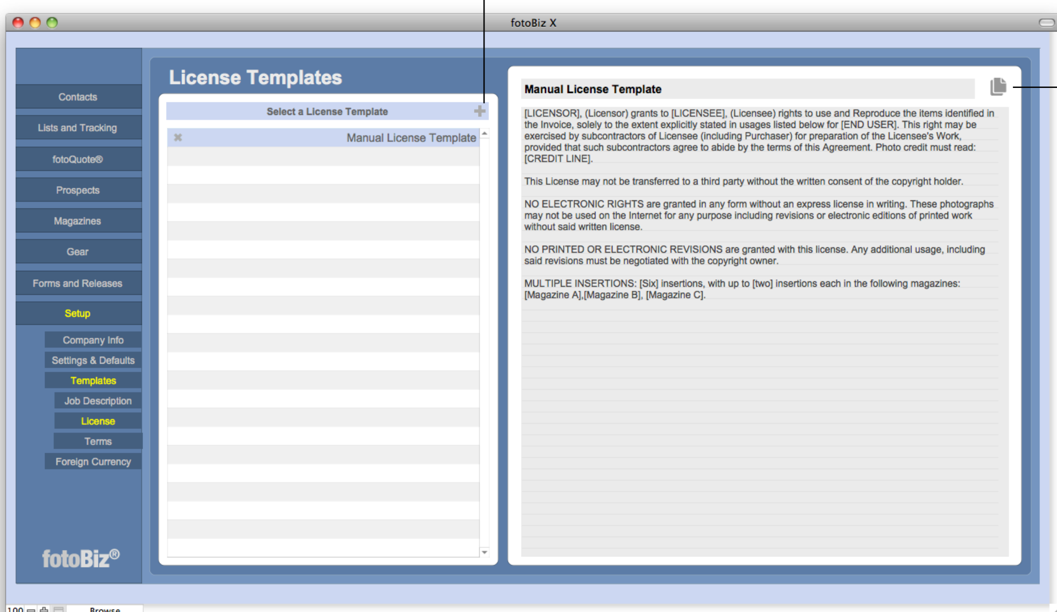
The license expiration information will include the invoice number and job title



Templates

Templates - License: There are three types of templates: Job Description, License and Terms. The Templates button under Setup allows you to create templates for items that you use often. For similar licenses you grant on a regular basis create a manual license template that can be applied to any new job that is similar to a previous one. These will be the default licenses you create, any changes you need to make to modify the license for a specific job or client can be done directly on the assignment or stock document without affecting the default text you enter here.

Click the plus (+) sign to add a new template. Then add your text or make edits to the right

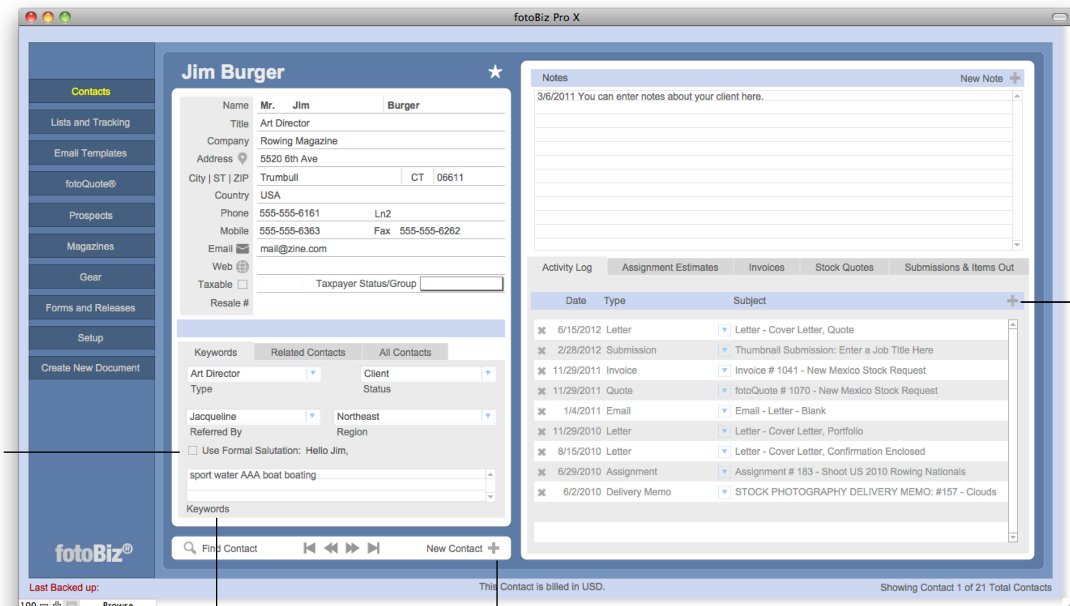


Select this icon to make a duplicate of an existing template

Templates - Job Description and Terms: These templates work the same way as they do for license templates. The Terms and Conditions included in the program for some of the professional organizations were the most current at the time fotoBiz was upgraded. Be sure to check that you're using the latest version recommended by these respective organizations.

Contacts

Entering A New Contact: Since all activities in fotoBiz begin with a client, finding or entering that client into your database is where you'll need to start. There are two ways to create an individual contact record. You can select New Contact from the bottom of the contact record or from the File drop-down menu. Begin at the top of the screen and enter all pertinent information about this contact. You can use the tab key to move between the fields.



The salutation check box changes the salutation from the informal to formal settings you've identified

All of your contact's information is visible on one screen. Click through the tabs to view the various documents for your client

Entering keywords about your contact can help refine search results with the Find Contact feature

Click here to enter a new contact

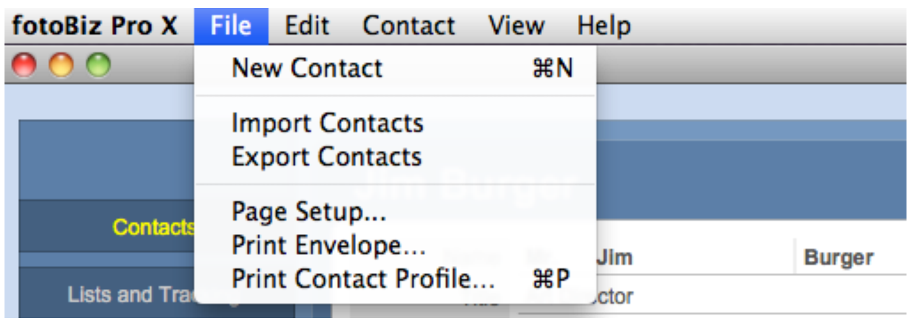
Duplicating a Contact: You can also duplicate a contact's record by selecting Duplicate Contact from the Contact drop-down menu option at the top.

Deleting a Contact: Deleting a contact works the same way as mentioned above for duplicating a contact. It is important to note that you cannot delete contacts that have various types of documents associated with them. These include estimates, quotes, invoices and memos.

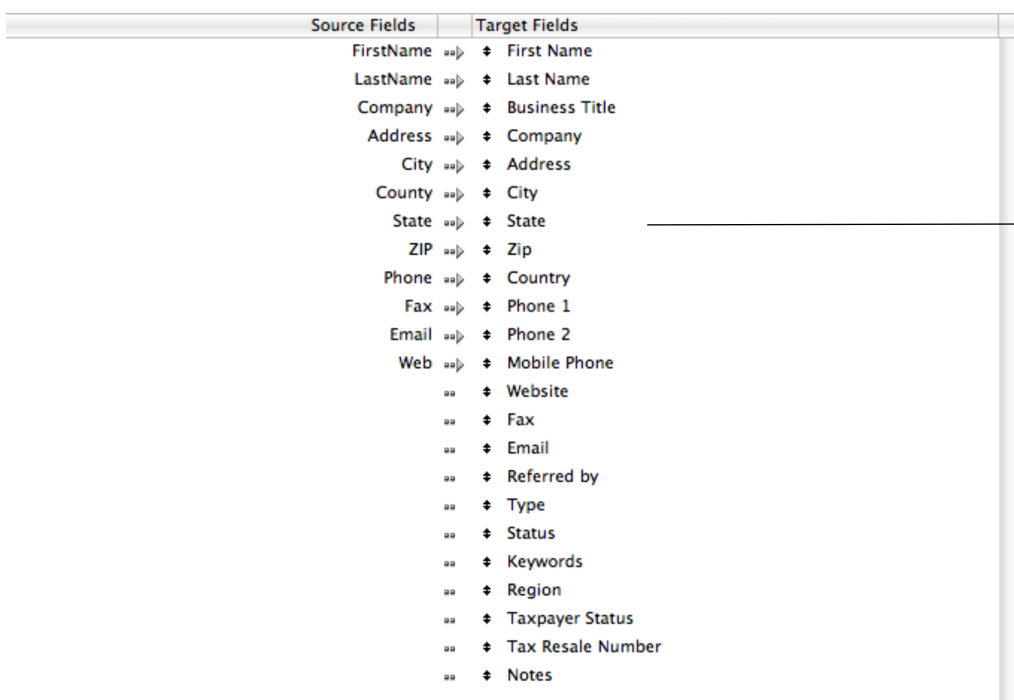
Hint: From the File drop-down menu you're able to print a contact's profile which will include their contact information, notes and activity log history. You can also print an envelope for an individual contact by selecting that option from the File drop-down menu.

Importing & Exporting Contacts

Importing Contacts: Another way to enter contacts is to import them from an external file. FotoBiz allows you to import contacts from many different file formats. This feature can save you a great deal of time. Be sure to back up your program before importing! This is very important. If you import 100 names and there's a problem, like you accidentally put the last name where the company should go, without a backup you'll need to delete all 100 names. When you're in Contacts the File menu drop-down will display options for importing and exporting records.



When you select Import Contacts you'll be asked to locate the file you want to import. Navigate to the file containing those records and select Open. This brings up an Import Field Mapping dialog box.

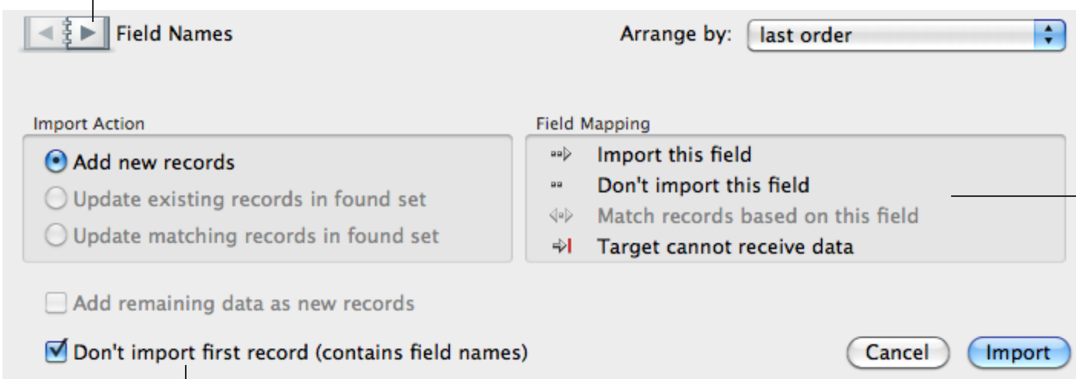


Drag the fotoBiz field (Target Fields column) up or down to match it with your field (Source Fields column). Make sure the arrow in the center column shows or that field won't be imported.

Importing & Exporting Contacts - Continued

You can use the arrow keys to scroll through your data to make sure that your information is matching up properly to the fotoBiz fields. Use the Field Mapping key to customize what data you want and don't want to import. Once you click the Import button, it's done, so take all the time you need to get the field mapping right the first time.

Click these arrow keys to scroll through your data



Use these keys to indicate what data you want to import

If the file you are importing has a header row, be sure to select the "Don't import first record (contains field names) check box

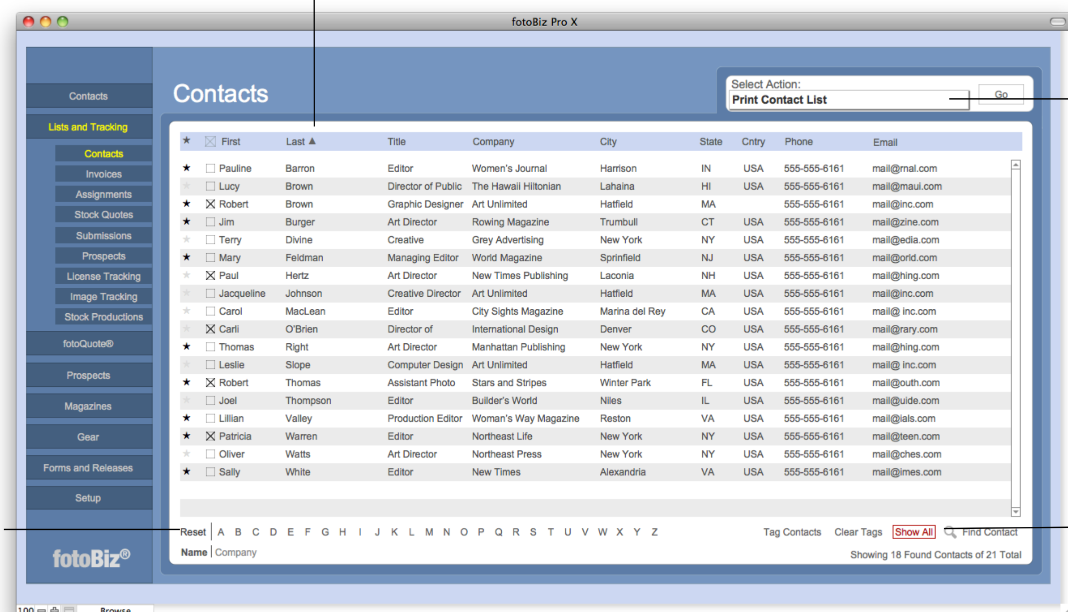
Exporting Contacts: Follow the directions for importing but select Export Contacts from the File menu. This automatically places the type of file you've specified on your desktop. Exporting will make a file of all of the contacts that are currently found. If you want to export all of your contacts, click the Show All button from the Contacts section in Lists and Tracking. If you want to export only the Magazine Editors in New York, find them before doing an export, and only those contacts will be exported.

Hint: Some of your clients may have company names and some may not. The same goes for fax numbers, cell phones, etc. Sometimes the only way to know what fields to match up is to scan through your file looking for customers with information in those fields.

Working With Contacts

Finding Contacts: It's easy to find Contacts in fotoBiz, just click the Find button in the lower right corner of the Lists and Tracking > Contacts screen, (you can also find contacts from the individual contact record). After the Find window opens, type your search query into the appropriate fields and click Search. If you select Art Director from the contact Type field and enter in NY in the State field, you'll find all the Art Directors in NY. From your found set of contacts you can select a variety of actions from the upper right portion of the screen. To reset the search select Show All from the bottom right.

Click next to each column header to sort the list ascending or descending



Select an action to, Export Contacts, Email Address Block or Print Contact List

Conduct quick sorts by selecting Name, Company or a specific letter in the alphabet

Click Show All to reset your found set

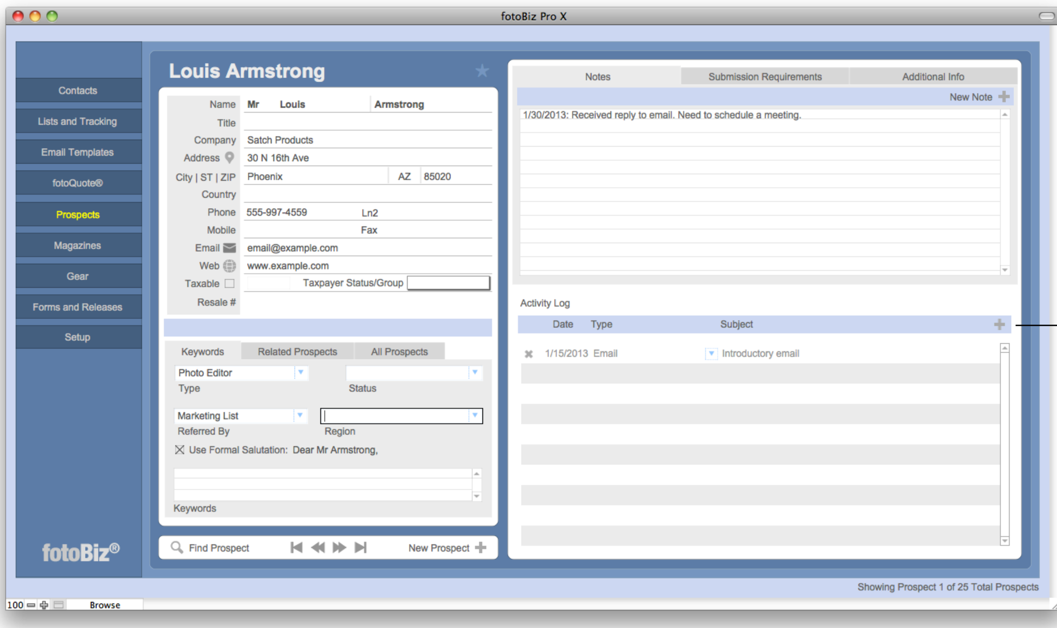
Tagging and Untagging Contacts: Tag/Untag individual clients by clicking on the box to the left of their name. To tag an entire found set click on Tag Contacts. From the Find Contacts search screen select the Tagged box in the upper right corner to find everybody that's tagged and only they will be displayed in your list.

Logging Notes and Items for Groups of Contacts: To record a note or log an activity for a found set, select these options from the Contacts drop-down menu. This will allow you to make notations and record activities for the entire found set.

Hint: You can delete a tagged set group of contacts by selecting Delete Tagged Contacts from the File drop-down menu. Any contacts with documents like estimates, quotes or invoices will be excluded.

Prospects

Working with Prospects: Working with Prospects is very similar to working with your Contacts. The manner in which you add, duplicate, delete, conduct finds and import and export is the same for prospects as it is for contacts. See the section above on Contacts for more details.



Enter various types of contact activity here by selecting the plus (+) sign

Prospect Tabs: To the right of the prospect contact information are three tabs. The Notes tab is fixed but the remaining two can be edited to fit your needs. From the File drop-down menu select Edit Tab Names to revise these tab headings.

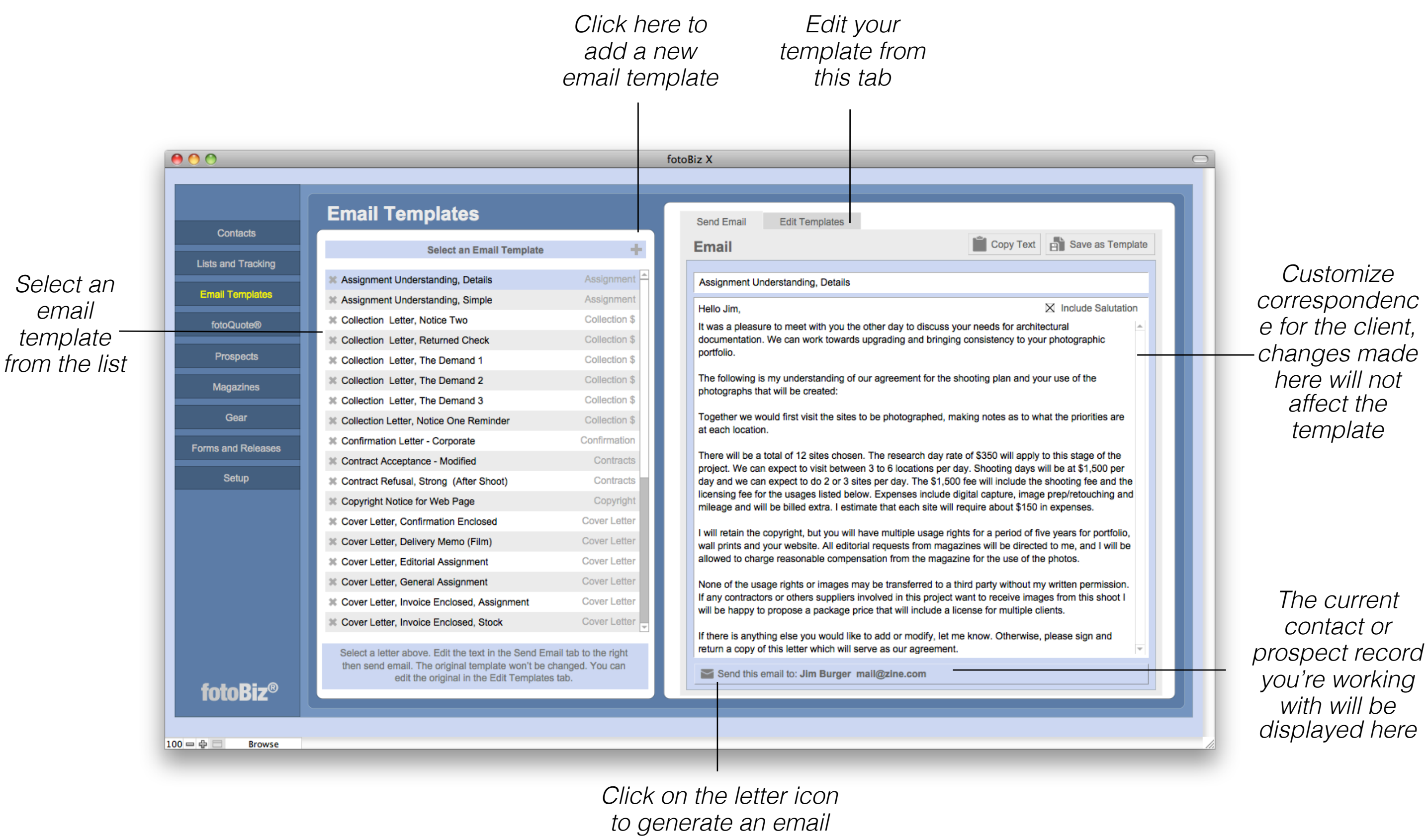
Converting a Prospect to a Contact: Once a prospect becomes a client, you can convert the record to a contact by selecting Convert to Contact from the Prospect drop-down menu. When this process is complete you'll automatically be taken to Contacts where your new record is displayed. Any content in the Notes or other two tabbed sections will all be placed into the Notes section of the new record.

Deleting All Prospects: Because prospects do not have any documents such as quotes and estimates associated with them, you do have the ability to delete ALL prospect records. From the File drop-down menu select Delete ALL Prospects to remove all prospect records.

Hint: The prospects you enter into fotoBiz should be those you are actively pursuing as clients, it is important to note that large imports into fotoBiz can cause the program to run slow. Keep this in mind when you're importing prospect records. Also, moving a client from Contact to Prospect is not possible due to the type of documents associated with client records. Should you need to enter an existing contact as a prospect, you'll need to do this manually.

Email Templates

Email Templates: Clear consistent communication with clients is one of the main keys to success. Thanking the writer who worked with you on assignments may get you recommended the next time the writer gets an assignment. For the busy photographer, who has little time to write, this part of fotoBiz makes keeping in touch with your clients easy and professional.

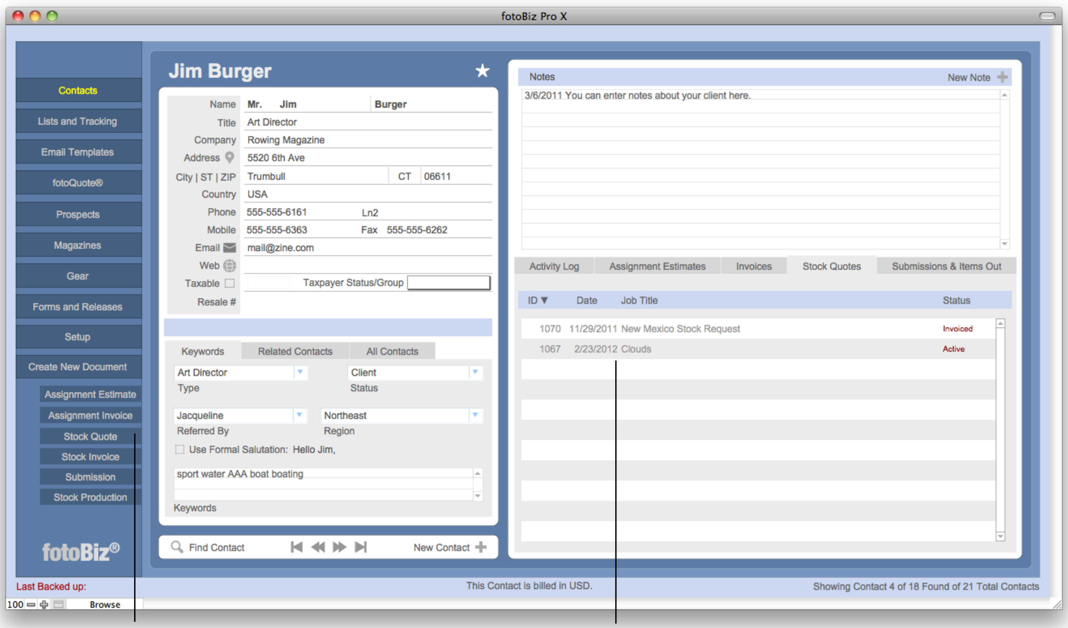


The templates in fotoBiz provide easy access to many of types of communications. You'll find templates that restate your understanding of an assignment, collection letters for late payments, responses to contract demands, cover letters for nearly everything including a portfolio submission, a letter that grants an extension of time to keep your images, late notices for your images and portfolio, and thank you letters.

Hint: The templates are grouped by category which is selected from the Edit Templates tab. For those users who have upgraded from fotoBiz 2 this feature did not exist. Any templates that you import from fotoBiz 2 will be given the category of Unassigned. To assign these a category, select the template and make your selection from the Edit Templates tab.

Stock Quotes

Creating a Stock Quote: Everything in fotoBiz begins with the client. To create a Stock Quote, you must either enter the new client or find the existing contact. You can conduct finds from either Lists and Tracking or Contacts. Once you locate the contact record select Stock Quote from the Create New Document menu on the left side of the contact record.



Select Stock Quote to create a new quote

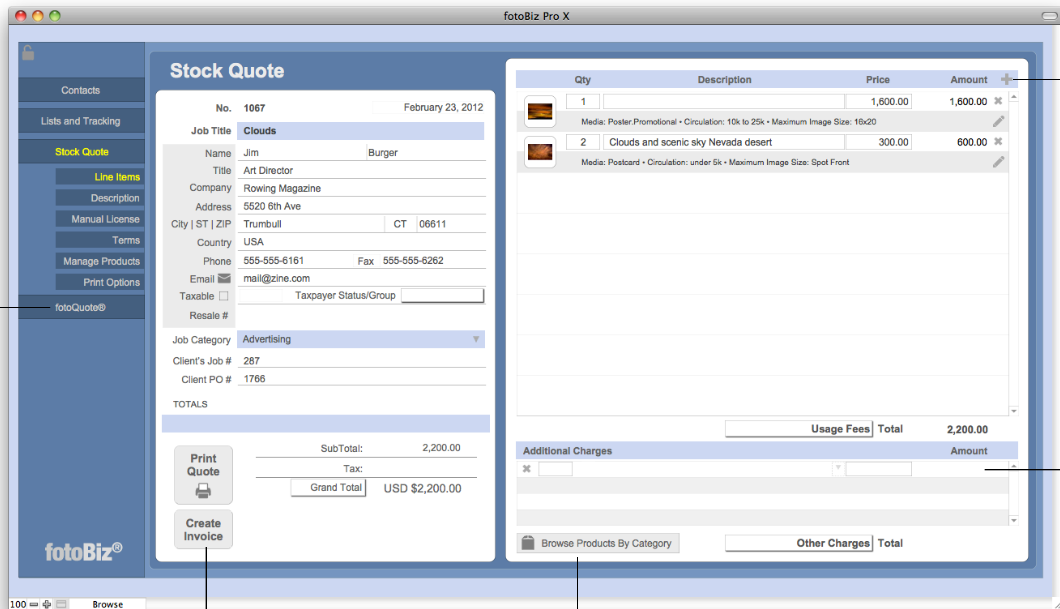
To open an existing quote for this contact make your selection from the list

This will open a new Stock Quote that allows you to enter individual line items, a job description, licensing language and your terms.

Hint: You can duplicate or delete quotes from the Quote drop-down menu. When you select duplicate you will be given the option to assign the quote to a new customer, an existing customer or the current customer.

Adding Line Items

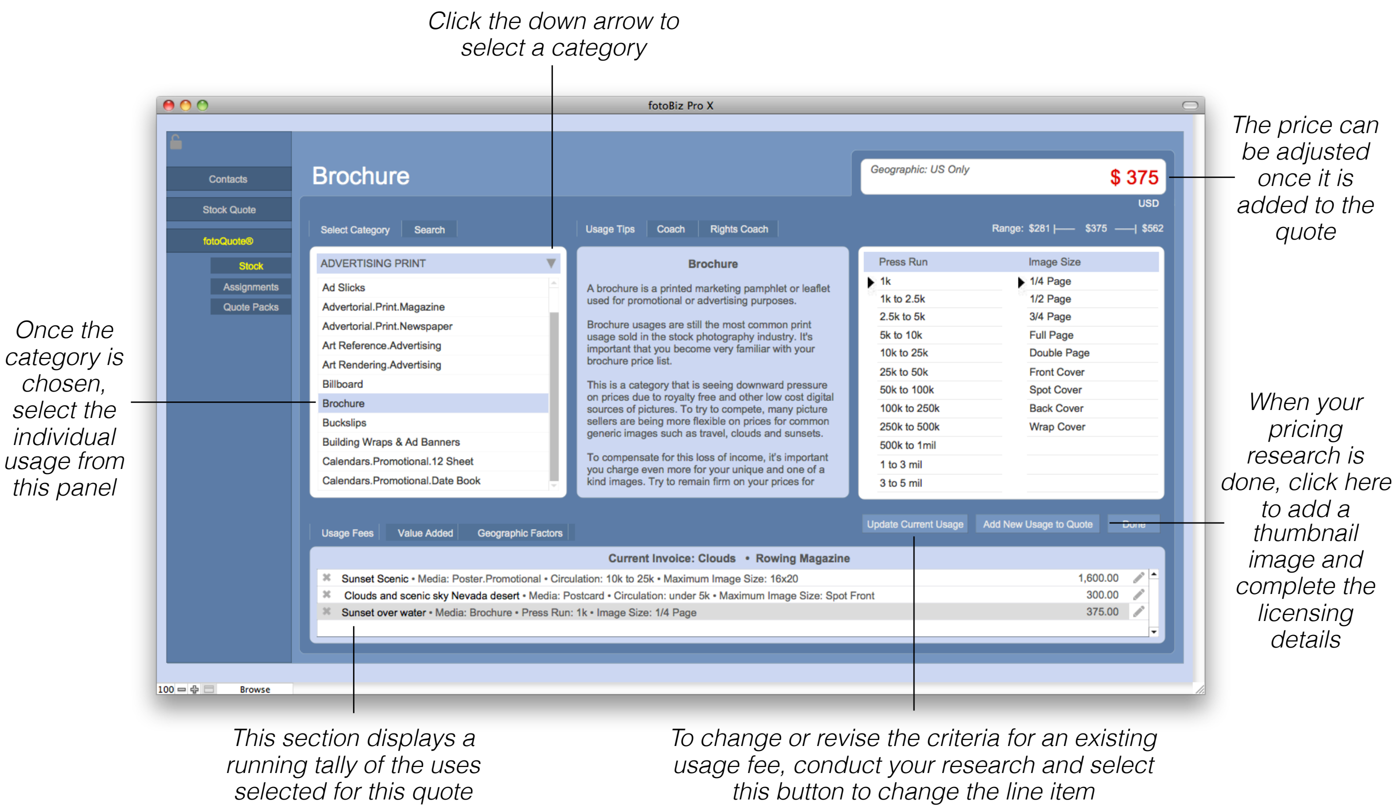
Adding Line Items: Image usage fee line items are added manually to the worksheet on the right or by researching your usage fees in fotoQuote. With either option you're able to add a thumbnail of the image you're licensing.



Additional Charges: Additional Charges are line items that are not associated with an individual image usage fee. These types of charges apply to the overall quote and include items like digital storage or delivery fees. When you select the Browse Products By Category button a list of products will appear at the left making it easy to select line items from your pre-existing products list.

Hint: If you've made any changes to the contact's information you can update the client's original contact record by selecting Update Contact Record from the Quote drop-down menu.

Using fotoQuote to Add Usage Fees: To add a usage fee from fotoQuote select fotoQuote from the menu to the left of the stock quote you're working on. This opens fotoQuote so you can conduct your pricing research and add usage fees to your stock quote.

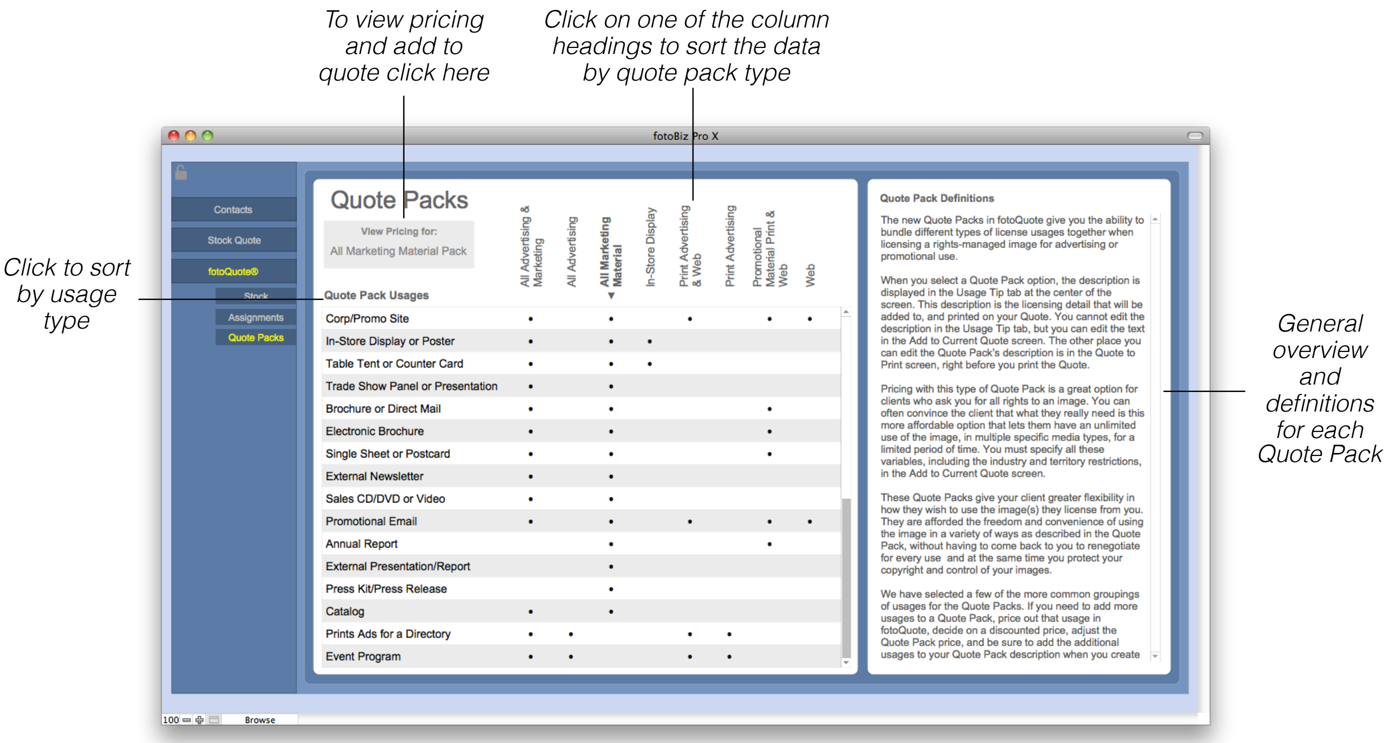


Usage Tips and Coach Tabs: In the center of the stock pricing screen are three tabs: Usage Tips, Coach and Rights Coach. The Usage Tips provides you with additional information about the use you've selected along with additional negotiating tips. The Coach tips include valuable information on pricing and negotiation for a variety of topics like revisions, discounts and multi-website use. The Rights Coach deals with specific rights requests such as exclusivity, buyouts and textbook use.

Hint: Click on the pencil icon to the right of the line item at the bottom of the screen to edit the selected line item.

fotoQuote for Stock

Quote Packs: You can access the Quote Pack pricing from two places in fotoQuote, from the menu options in the fotoQuote section of the program, or from the Stock pricing section as one of the category selections. The chart below helps you see exactly what usages are included in each Quote Pack.



Quote Packs give you the ability to bundle different types of license usages together when licensing a rights-managed image for advertising or promotional use. Pricing with this type of Quote Pack is a great option for clients who ask you for all rights to an image. You can often convince the client that what they really need is this more affordable option that lets them have an unlimited use of the image, in multiple specific media types, for a limited period of time.

These Quote Packs give your client greater flexibility in how they wish to use the image(s) they license from you.They're afforded the freedom and convenience of using the image in a variety of ways as described in the Quote Pack, without having to come back to you to renegotiate for every use. At the same time you protect your copyright and maintain control of your images.

Adding Image Information

Adding Image Information: When you add an image use fee you need to define the licensing of that image. When this is done directly from fotoQuote several fields will be populated for you automatically. These include the price, license duration and the fotoQuote criteria such as Press Run and Image Size. Other fields such as placement, territory, versions, exclusivity, etc. have drop-down menus for you to further refine the usage license.

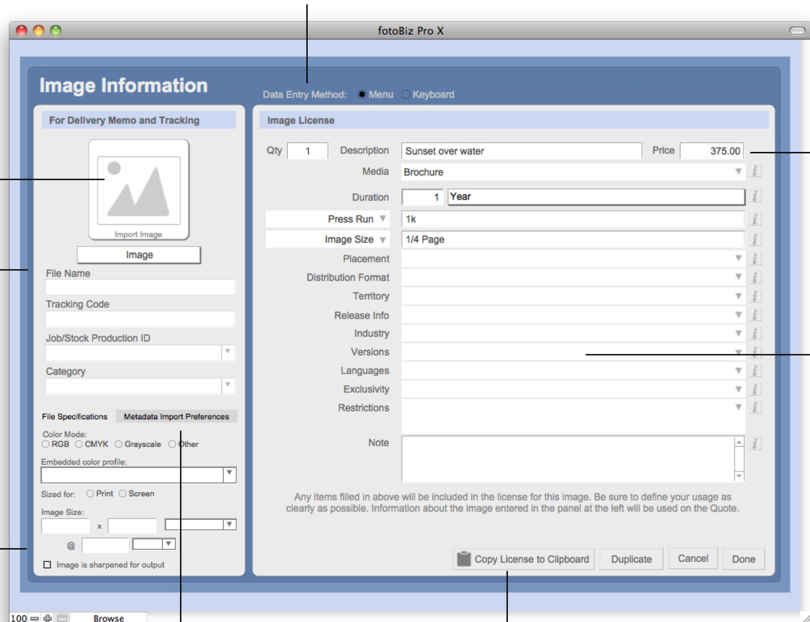


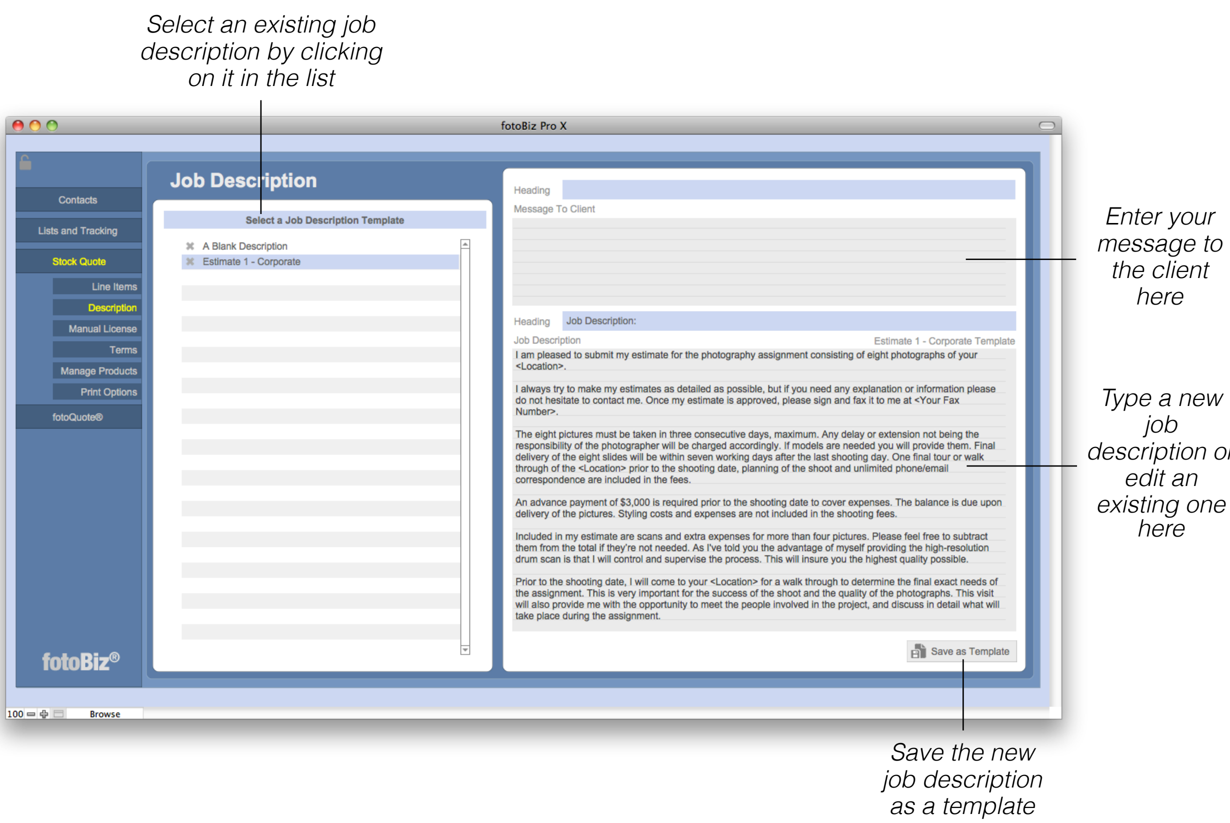
Image Tracking Info: The thumbnail defaults you select in Setup > Settings and Defaults will populate various fields on the left side of the screen automatically when you import an image thumbnail. When an invoice is created from a Stock Quote this information is used to track sales.

Data Entry Method: There are two ways in which you can enter the details of your license. The Keyboard method allows you to tab and type from field to field. With the Menu option you'll need to select the drop-down arrow or click into the field to make your selection.

Hint: You can update any image license fee by going back into fotoQuote to revise your pricing. When you're done with your research, select the Update Current Usage button from the fotoQuote Stock Pricing screen to update the usage fee for the current image. You can update an image thumbnail as well.

Adding a Job Description

Adding a Job Description: You have two description text field options. In this first section you can include a message to the client that will print out on the stock quote. This might include important information that is not necessarily specific to the job description. When left blank this section will not print to the stock quote. Use the second larger section to include your description of the job, project description, service provided, etc.



As you create job descriptions that you may use again in the future you can select the Save as Template button from the lower right to store different types of job descriptions. When you need it again for a similar job just call up that template by selecting it from the list on the left. Then you'll be able to make any needed changes for the conditions of your current job.

To change or edit the Heading title for either text field click on the blue line to bring up a list of menu options. To add a new Heading select Edit, add your text and then click in the blue line again to select your new entry.

Creating a License

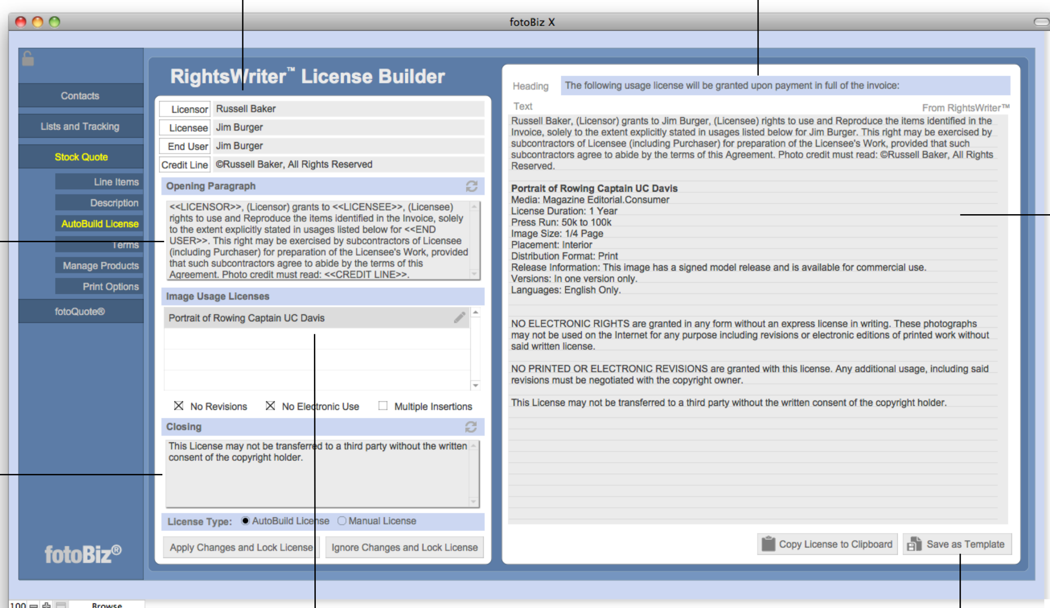
Creating an AutoBuild License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the AutoBuild License feature. Deciding what rights to grant with your license is an important part of pricing your images. The RightsWriter License Builder helps you build your licensing agreement.

These fields will populate automatically based on the default settings selected. They can be edited here

This is your license preview screen based on the information on the left

This information pulls from your stock quote default settings. Select the refresh button to reset the original text

The license details are pulled from the usage fee line items on the quote



Individual line items will be listed here

Save the new license as a template to select later as a Manual License

Merge Fields: The Licensee, End User, Licensor and Credit Line are all merge fields that you can insert into the Opening or Closing paragraphs. To insert one of these fields, place your cursor where you want the merge field to appear and click the button adjacent to that item. This will automatically add the contents of that field to your license.

An Autobuild license takes the information you've already entered about the image usage and builds a license for you automatically. If you want to format your license differently or add additional information you want to use the ManualBuild license instead. The AutoBuild License is also the only way you can include a thumbnail with a license.

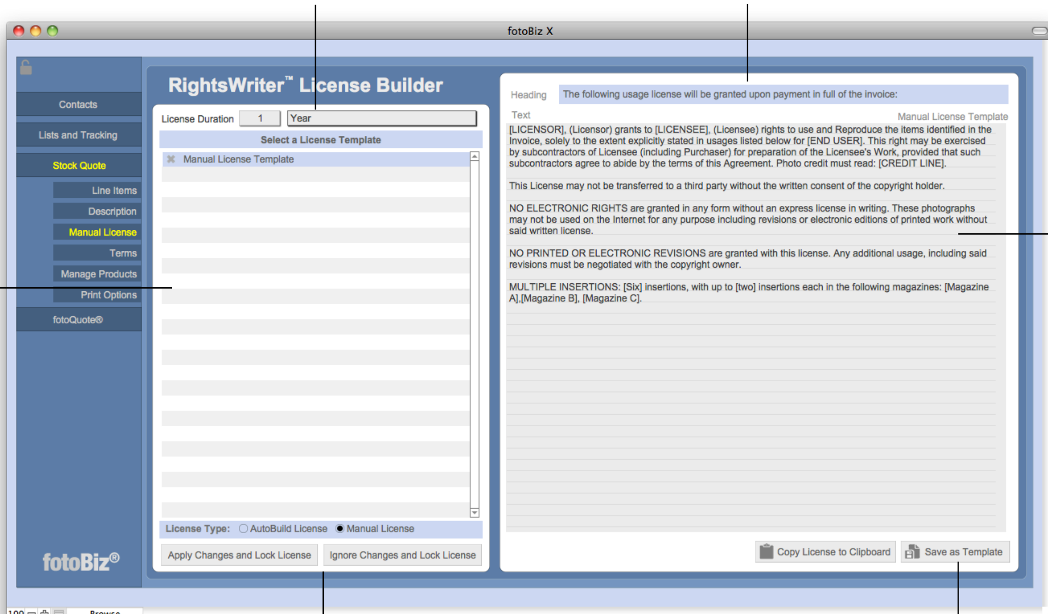
Creating a License - Continued

Creating a Manual License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the Manual License feature. It is important to state clearly exactly what rights you are basing the quote on. Stating your terms of doing business clearly and consistently is your best defense against the client trying to dictate your terms for you.

Enter your license duration here. Use the drop-down menu to specify, year, month, day, etc.

This is your license preview screen based on the Manual License selection on the left

Select a starter template from this panel



Changes made here will not affect the original template

You cannot print a stock quote with a license that us unlocked. Select one of these options to lock your license

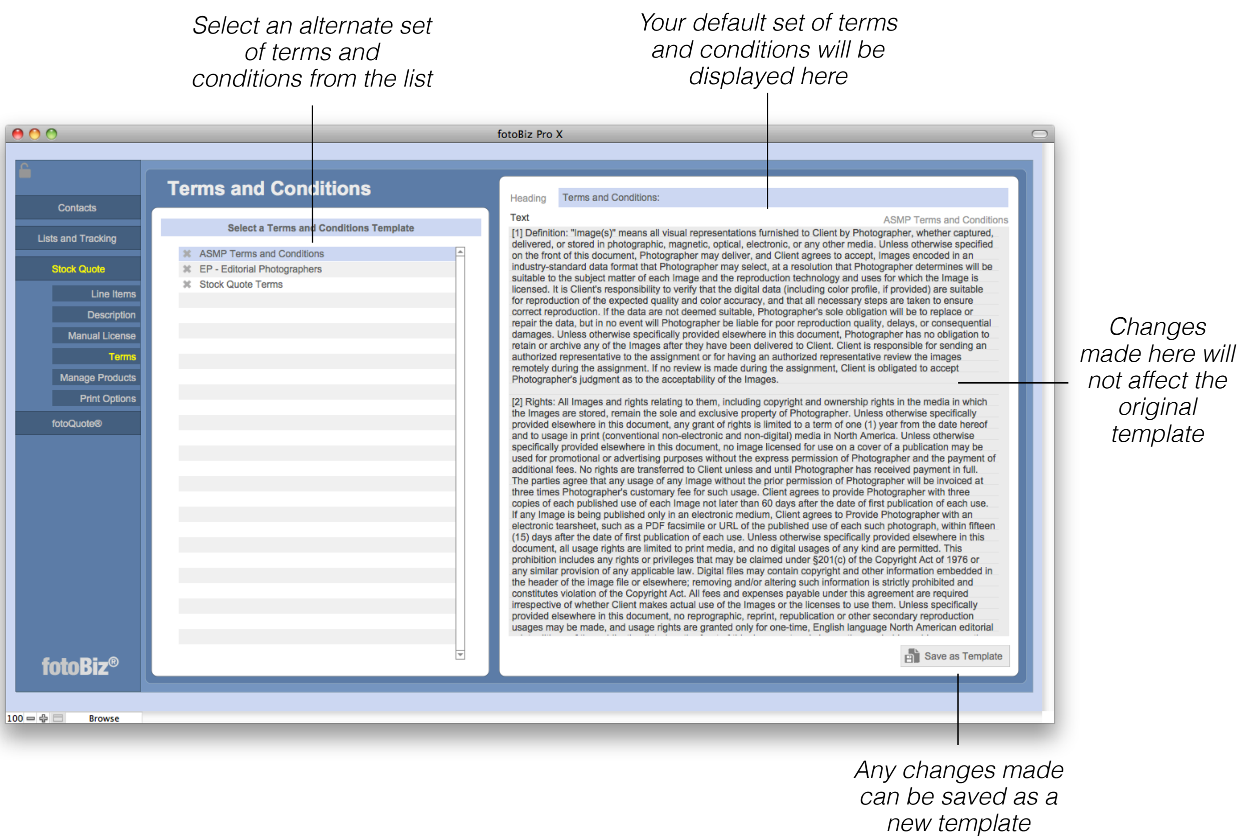
Save the new license as a template to select later as a Manual License

A Manual License is used when you want to customize the way the license information is presented or if you want to use a license template. It is not possible to track specific image licenses with a manual license, if you want to do so you must use the AutoBuild license.

Hint: For stock quotes that are not accepted or expire, you're able to mark them as inactive by selecting this option from Quote drop-down menu.

Terms and Conditions

Selecting Terms and Conditions: The default terms and conditions you identified as part of setting up your templates will automatically be displayed here. You can select a different set of terms from the list on the left or make edits in the window to the right.



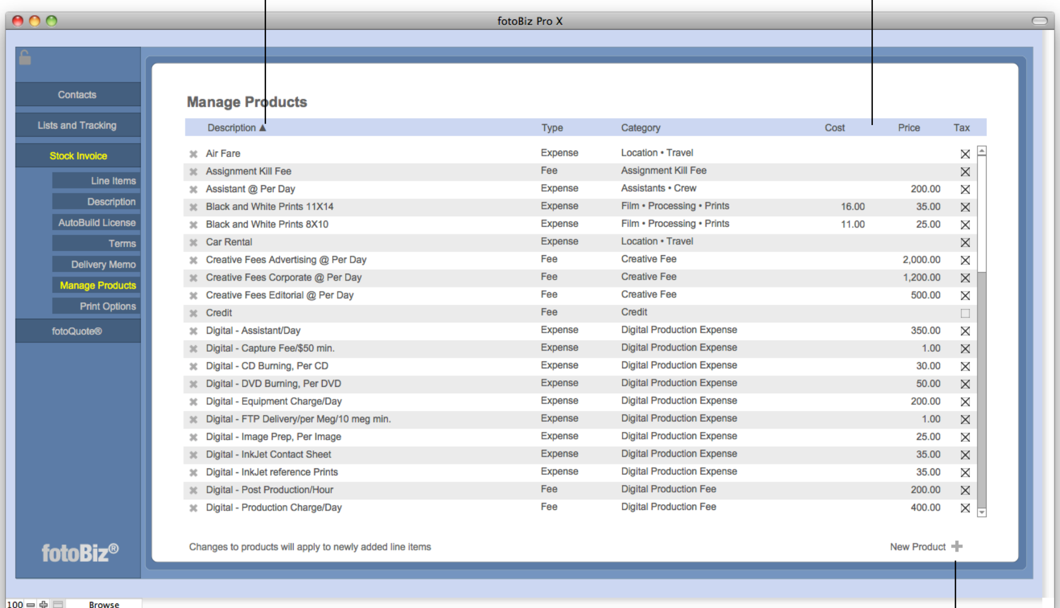
The Terms and Conditions included in fotoBiz X for some of the professional organizations were the most current at the time fotoBiz was being upgraded. Be sure to check that you're using the latest version recommended by these respective organizations.

Managing Products

Managing Products: You can manage your products from three separate places in fotoBiz. Select the Manage Products menu item from either Stock Quotes, Assignments or Invoices. When you select New Product from the lower right corner you'll be presented with a dialog box to complete your entry. Complete the description, type and category and indicate whether the item is taxable or not, then select OK.

Sort your product list by selecting the ascending or descending arrow

Enter the cost you incur for the item and the price you charge in these columns



Add a new product here

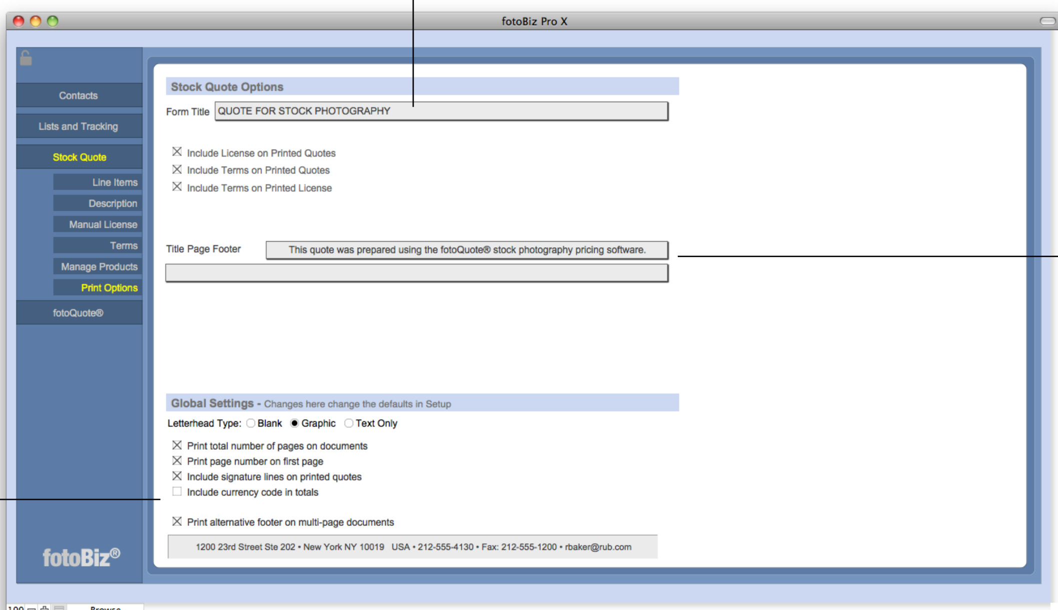
Entering your cost for each item will provide you with valuable profit and loss reporting information on your Stock Productions.

Hint: Changes you make to existing products will apply only to newly added line items.

Print Options

Stock Quote Printing Options: The printing options you select under Stock Quote Print Options are only for the stock quote you're currently working on. This allows you to customize the information you want displayed on your quote per job, or per client. The changes you make here do not affect your Stock Quote default settings. If you want to make global changes to your Stock Quote print options that apply to all quotes, go to Setup from the main Contacts screen and then choose the Stock Quote tab under Settings and Defaults.

Click into the title field to view a list of options. Select Edit to make changes or additions



You have two lines for a footer message. Make your selections here or leave blank

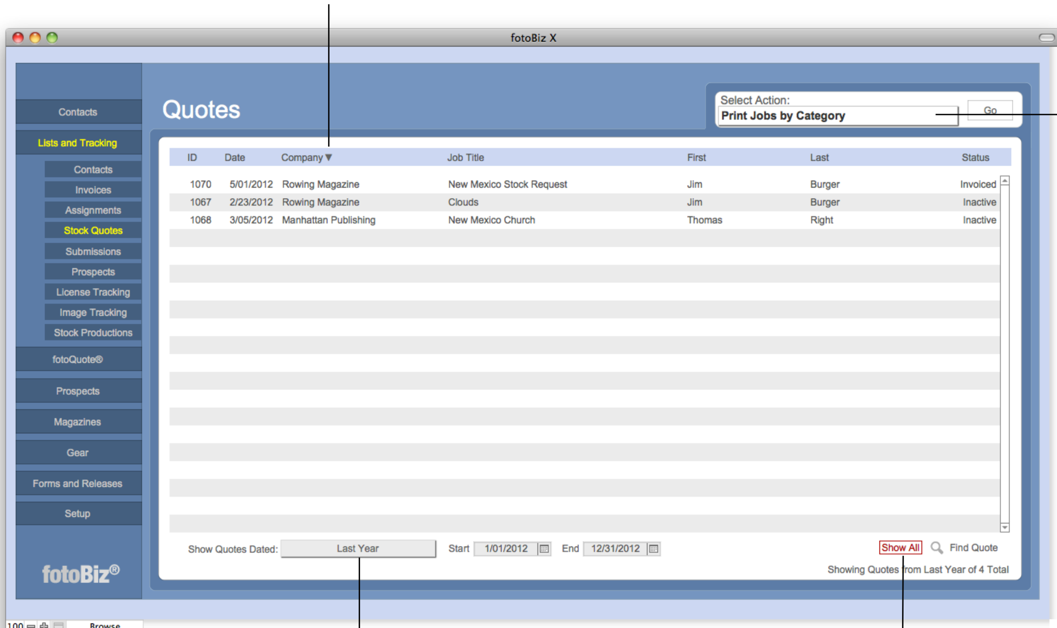
Define what information you want printed on the Stock Quote

Global Setting Print Options: The Global Settings apply to all stock quotes. The changes you make here will apply to all stock quotes.

Stock Quote Lists and Reporting

Finding Stock Quotes: Working with your Stock Quotes is similar to how you work with your Contacts and Prospects lists. Each column has a descending and ascending sort order. To conduct a search for a specific set of quotes select Find Quote from the lower right corner or select Find Quote from the Quote drop-down menu.

Click next to each column header to sort the list ascending or descending



Select an action to Print Jobs by Category or by Company

Filter your quotes by various date ranges

Select Show All to reset the found set

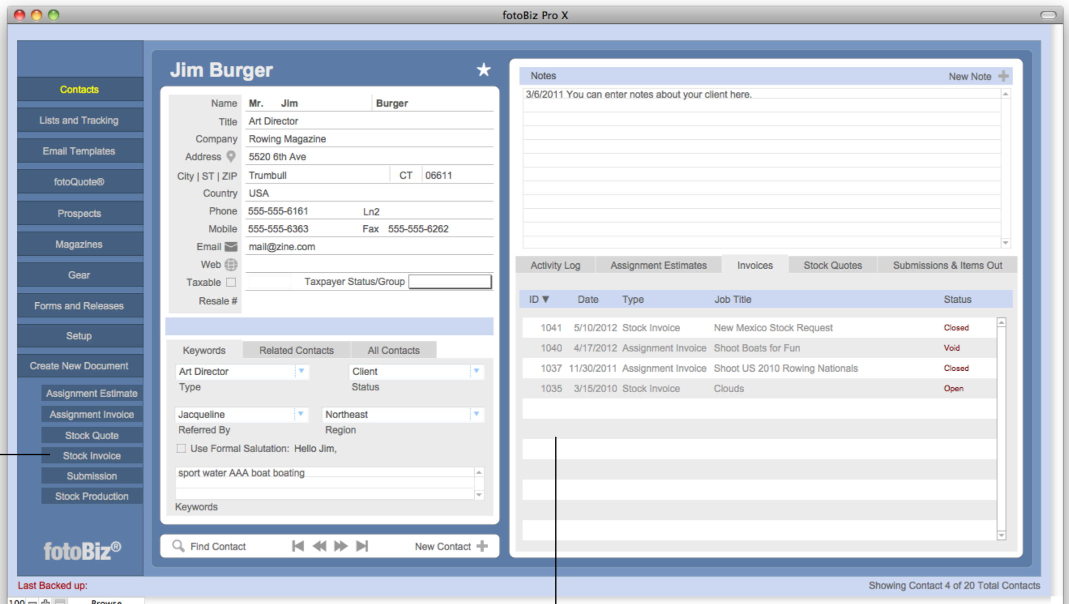
Stock Quote Reporting: You're able to print reports of your stock quotes by company or by category such as advertising, editorial, corporate, etc. The action you select from the upper right corner will print the current found set displayed on the screen. You'll then have the option to print all quotes in that found set or only those invoiced or active.

Stock Quote Browsing: When you select a quote from the displayed list you can quickly browse through those quotes by selecting View from the menu bar or by using the Command and arrow keys to indicate the first, last, next or previous quote.

Stock Invoices

Creating a Stock Invoice: You can create a stock invoice a couple of ways. If you've already created a stock quote (see page 22) you can simply select the Create Invoice button from the stock quote itself. This is the quickest, easiest way to create a stock invoice. To create a stock invoice without having first created a stock quote, select Stock Invoices from the Create New Document menu at the left.

From the Create New Document menu select Stock Invoices to create a new invoice



To open an existing invoice for this contact make your selection from the list

Hint: Remember that everything in fotoBiz begins with the client. So in order to create a new Stock Invoice you'll need to first find the client's record. See page 18 for more information on conducting finds for contacts.

Adding Line Items

Adding Line Items: When you select the Create Invoice button from an existing Stock Quote, any image line items on the quote will also be on the invoice. Edit or delete line items from the invoice before printing it. Image usage fee line items are added manually to the worksheet on the right or by researching your usage fees in fotoQuote. With either option you're able to add a thumbnail of the image you're licensing.

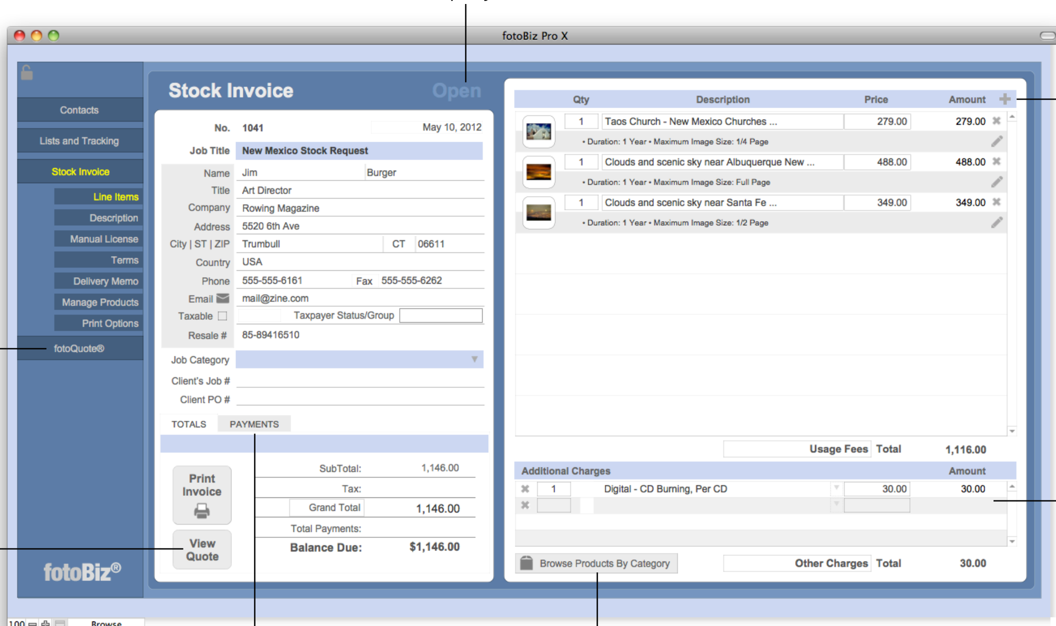
Invoices with a balance due will show as open. When an invoice is paid in full it will display as closed

Click the plus (+) sign to add a line item

Open fotoQuote here to add a usage fee directly from your fotoQuote pricing research

Click here to view the original quote the invoice was created from

Additional line item charges shown here



Enter payments by selecting the Payments tab

Browse the products listing to add additional charges

Additional Charges: Additional Charges are line items that are not associated with an individual image usage fee. These types of charges apply to the overall invoice and include items like digital storage or delivery fees. When you select the Browse Products by Category button a list of products will appear at the left making it easy to select line items from your pre-existing products list.

Hint: Any existing usage fee from fotoQuote can be updated and automatically adjusted by selecting the Update Current Usage button from the fotoQuote screen.

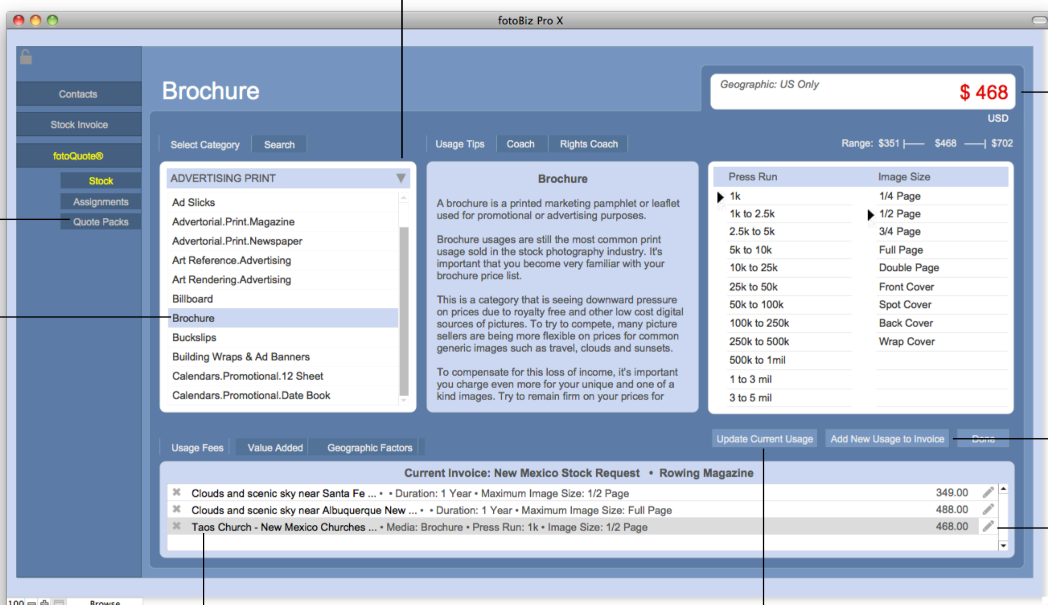
fotoQuote for Stock

Using fotoQuote to Usage Add Fees: To add a usage fee from fotoQuote select fotoQuote from the menu to the left of the stock invoice you are working on. This opens fotoQuote so you can conduct your pricing research and add usage fees to your stock invoice. You can also update any existing line item from a pre-existing stock quote.

Click the down arrow to select a category

Quote Packs are groups of uses bundled together

Once the category is chosen, select the individual usage from this panel



The price can be adjusted once it is added to the invoice

When your pricing research is done, click here to add a thumbnail image and complete the licensing details

Edit existing line item

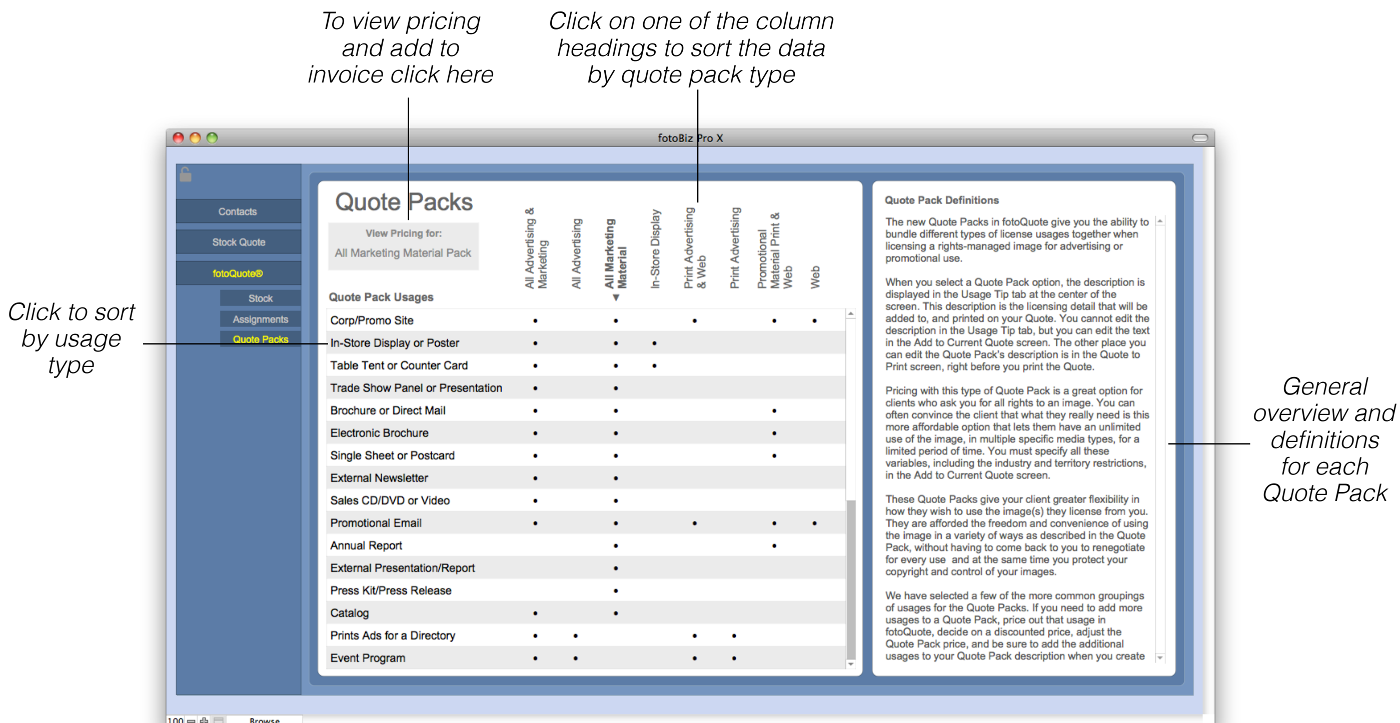
This section displays a running tally of the uses selected for this invoice

To change or revise the criteria for an existing usage fee, conduct your research and select this button to change the line item

Usage Tips and Coach Tabs: In the center of the stock pricing screen are three tabs: Usage Tips, Coach and Rights Coach. The Usage Tips provides you with additional information about the use you've selected along with additional negotiating tips. The Coach tips include valuable information on pricing and negotiation for a variety of topics like revisions, discounts and multi-website use. The Rights Coach deals with specific rights requests such as exclusivity, buyouts and textbook use.

fotoQuote for Stock - Continued

Quote Packs: You can access the Quote Pack pricing from two places in fotoQuote, from the menu options in the fotoQuote section of the program, or from the Stock pricing section as one of the category selections. The chart below helps you see exactly what usages are included in each Quote Pack.



Quote Packs give you the ability to bundle different types of license usages together when licensing a rights-managed image for advertising or promotional use. Pricing with this type of Quote Pack is a great option for clients who ask you for all rights to an image.You can often convince the client that what they really need is this more affordable option that lets them have an unlimited use of the image, in multiple specific media types, for a limited period of time.

These Quote Packs give your client greater flexibility in how they wish to use the image(s) they license from you. They're afforded the freedom and convenience of using the image in a variety of ways as described in the Quote Pack, without having to come back to you to renegotiate for every use. At the same time you protect your copyright and maintain control of your images.

Adding Image Information

Adding Image Information: When you add an image use fee you'll need to define the licensing of that image. When this is done directly from fotoQuote several fields are populated for you automatically. These include the price, license duration and the fotoQuote criteria such as Press Run and Image Size. Other fields such as placement, territory, versions, exclusivity, etc. have drop-down menus for you to further refine the usage license.

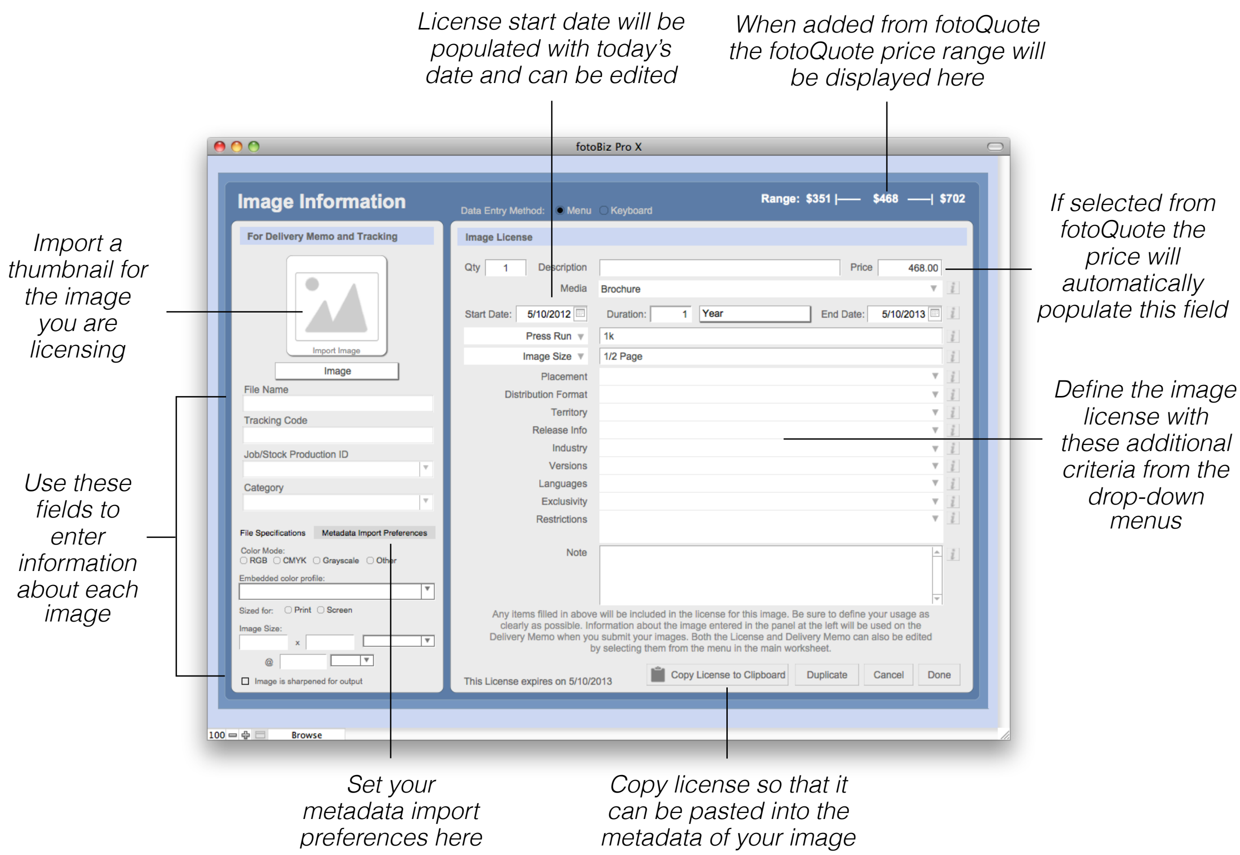


Image Tracking Info: The thumbnail defaults you select in Setup > Settings and Defaults will populate various fields on the left side of the screen automatically when you import an image thumbnail. When an invoice is created this information is used to track sales.

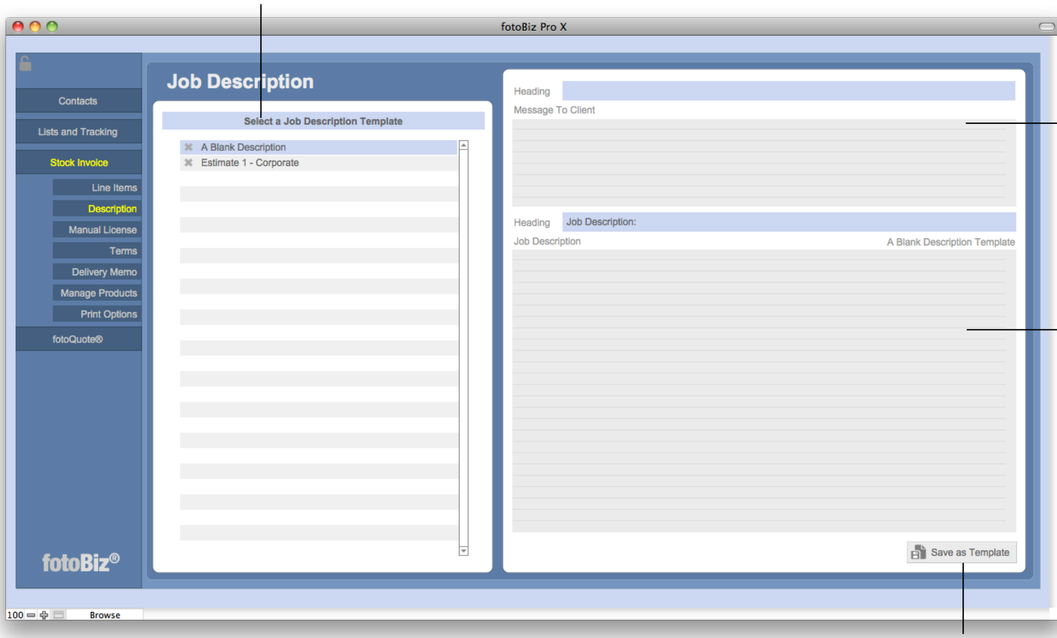
Data Entry Method: There are two ways in which you can enter the details of your license. The Keyboard method allows you to tab and type from field to field. With the Menu option you'll need to select the drop-down arrow or click into the field to make your selection.

Hint: You can update any image thumbnail by selecting the image and choosing Replace.

Adding a Job Description

Adding a Job Description: You have two description text field options. In this first section you can include a message to the client that will print out on the stock invoice. This might include important information that is not necessarily specific to the job description. When left blank this section does not print. Use the second larger section to include your description of the job, project description, service provided, etc. If the invoice was created from a stock quote, this information will automatically carry over.

Select an existing job description by clicking on it in the list



Enter your message to the client here

Type a new job description or edit an existing one here

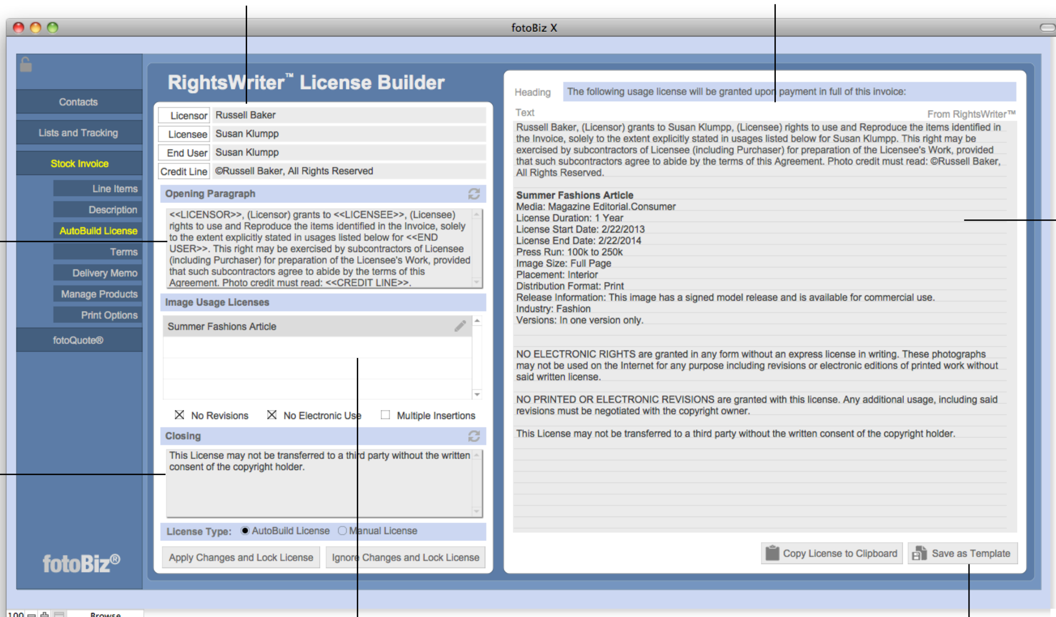
Save the new job description as a template

As you create job descriptions that you may use again in the future you can select the Save as Template button from the lower right to store different types of job descriptions. When you need it again for a similar job just call up that template by selecting it from the list on the left. Then you'll be able to make any needed changes for the conditions of your current job.

To change or edit the Heading title for either text field click on the blue line to bring up a list of menu options. To add a new Heading select Edit, add your text and then click in the blue line again to select your new entry.

Creating a License

Creating an AutoBuild License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the AutoBuild License feature. Deciding what rights to grant with your license is an important part of pricing your images. The RightsWriter License Builder helps you build your licensing agreement.



Merge Fields: The Licensee, End User, Licensor and Credit Line are all merge fields that you can insert into the Opening or Closing paragraphs. To insert one of these fields, place your cursor where you want the merge field to appear and click the button adjacent to that item. This will automatically add the contents of that field to your license.

An AutoBuild license takes the information you've already entered about the image usage and builds a license for you automatically. If you want to format your license differently or add additional information you would want to use the ManualBuild license instead. The AutoBuild License is also the only way you can include a thumbnail with a license.

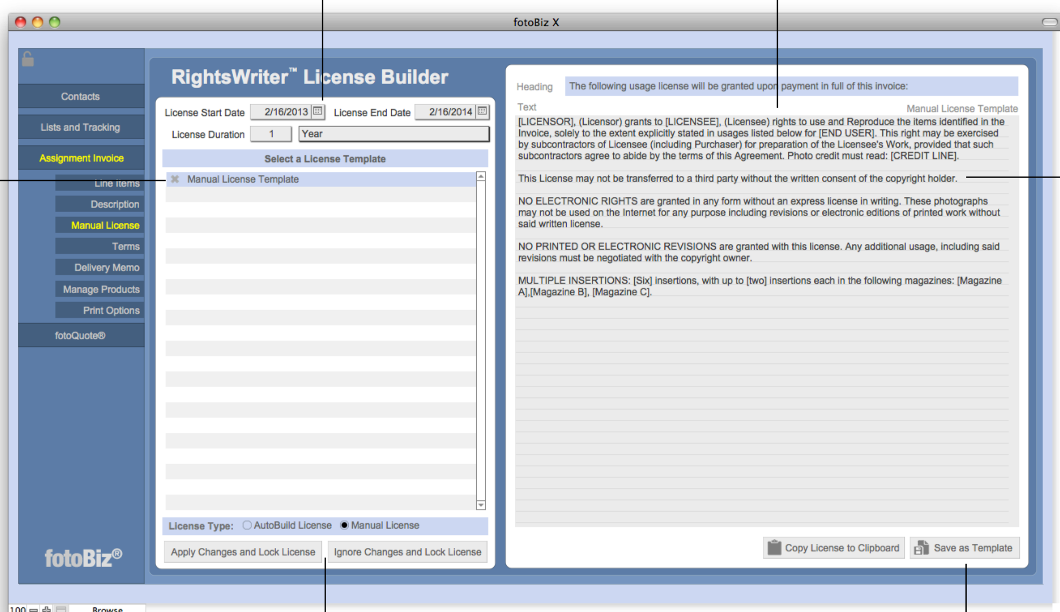
Creating a License - Continued

Creating a Manual License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the Manual License feature. It's important to state clearly exactly what rights you're basing the invoice on. Stating your terms of doing business clearly and consistently is your best defense against the client trying to dictate your terms for you.

If the invoice was created from a quote this information will automatically populate

This is your license preview screen based on the Manual License selection on the left

Select a starter template from this panel



Changes made here will not affect the original template

You cannot print a stock invoice with a license that us unlocked. Select one of these options to clock your license

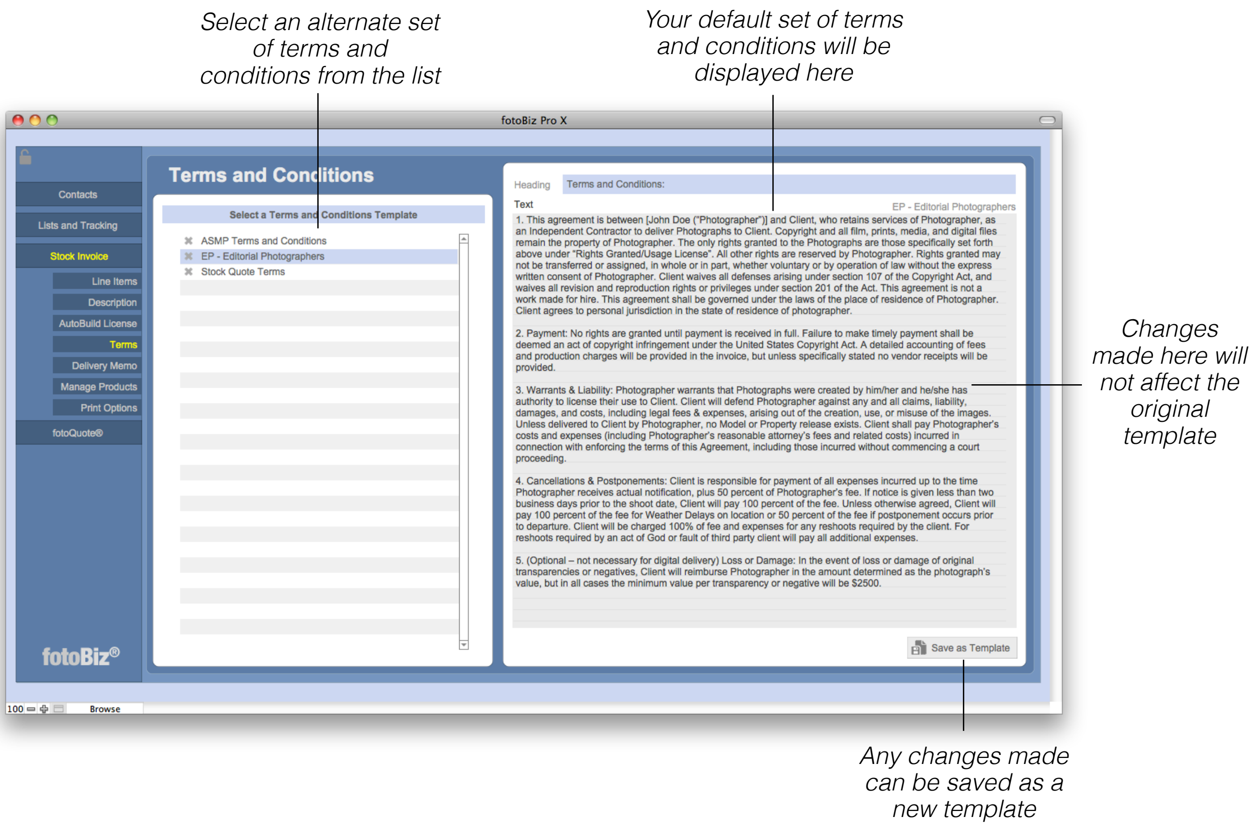
Save the new license as a template to select later as a Manual License

A Manual License can be used when you want to customize the way the license information is presented or if you want to use a license template. It is not possible to track specific image licenses with a manual license, if you want to do so you must use the AutoBuild license.

Exporting License Reminders: If don't have license reminders automatically set to export in Setup > License Reminder, then you can individually export a license reminder for only those license expiration dates you want to track. To do this select Invoice from the drop-down menu and click on Export License Reminder.

Terms and Conditions

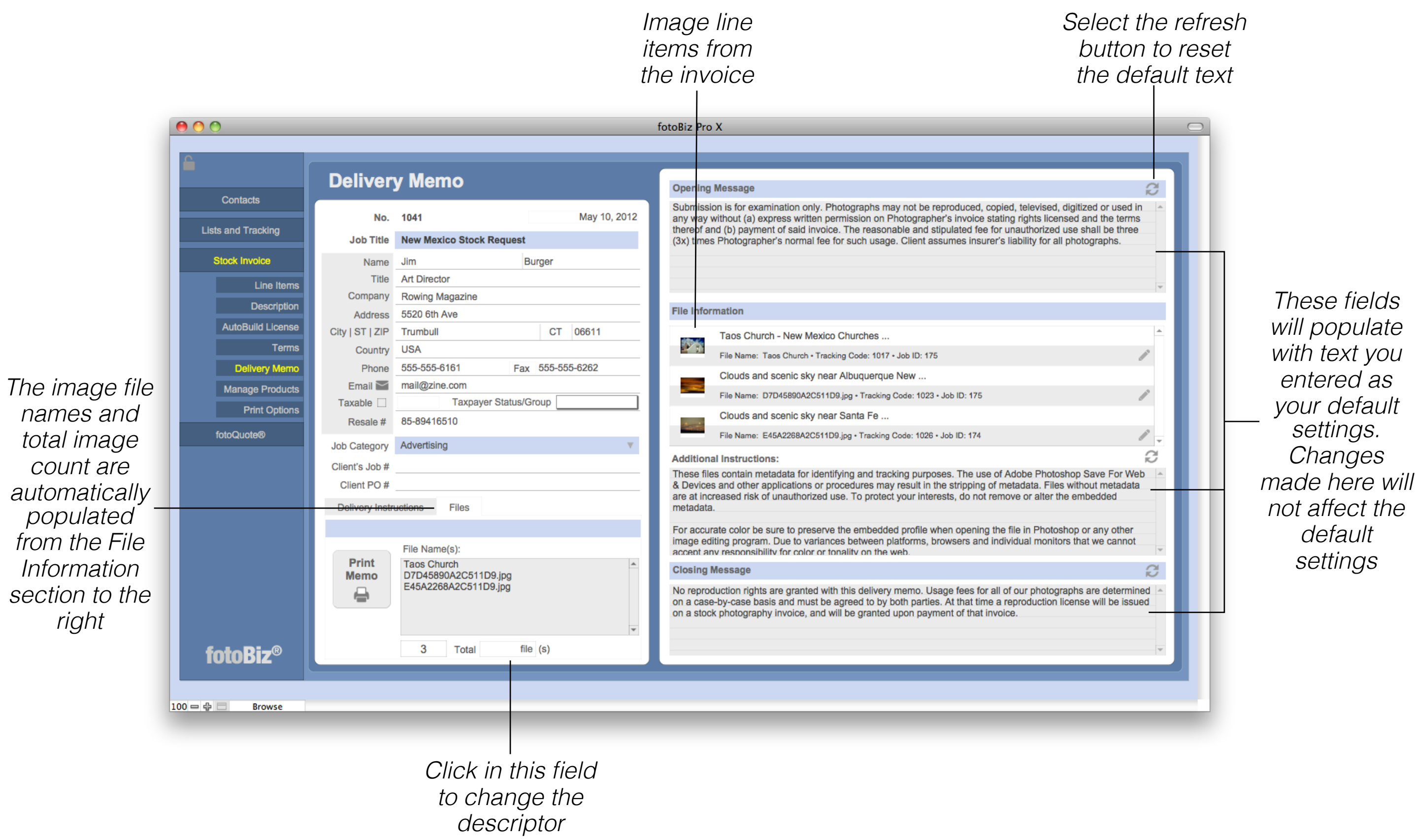
Selecting Terms and Conditions: The default terms and conditions you identified as part of setting up your templates will automatically be displayed here. You can select a different set of terms from the list on the left or make edits in the window to the right.



The Terms and Conditions included in the program for some of the professional organizations were the most current at the time fotoBiz X was upgraded. Be sure to check that you're using the latest version recommended by these respective organizations.

Creating a Delivery Memo

Creating a Delivery Memo: Create a delivery memo to send with the invoice or send it to the creative department separate from the invoice. Delivery memos do not have pricing information and can be used to accompany the images when sending them to the creative department. This way the accounting department gets the invoice and the end user of the images gets the file specifications along with the licensing information. This helps to ensure that the images are used in the manner and the duration that was agreed upon.



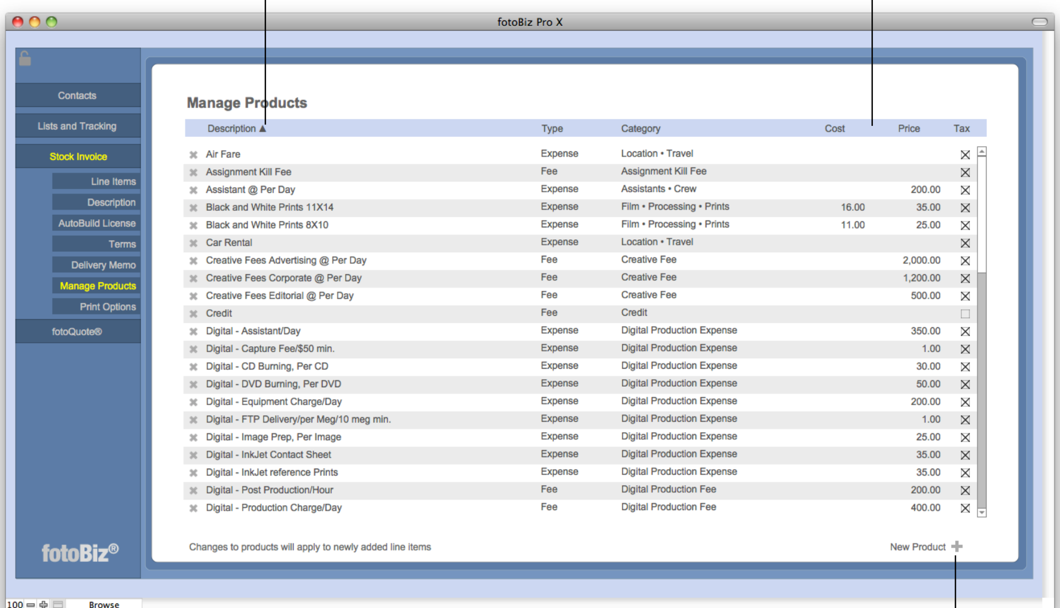
In addition to the default messaging, the delivery memo automatically prints the same information to the memo as it does to the invoice. When Include License on Printed Invoice is checked in the Print Options section, the license will also print to the delivery memo.

Managing Products

Managing Products: You can manage your products from three separate places in fotoBiz. Select the Manage Products menu item from either Stock Quotes, Assignments or Invoices. When you select New Product from the lower right corner you'll be presented with a dialog box to complete your entry. Complete the description, type and category and indicate whether the item is taxable or not then select OK.

Sort your product list by selecting the ascending or descending arrow

Enter the cost you incur for the item and the price you charge in these columns



Add a new product here

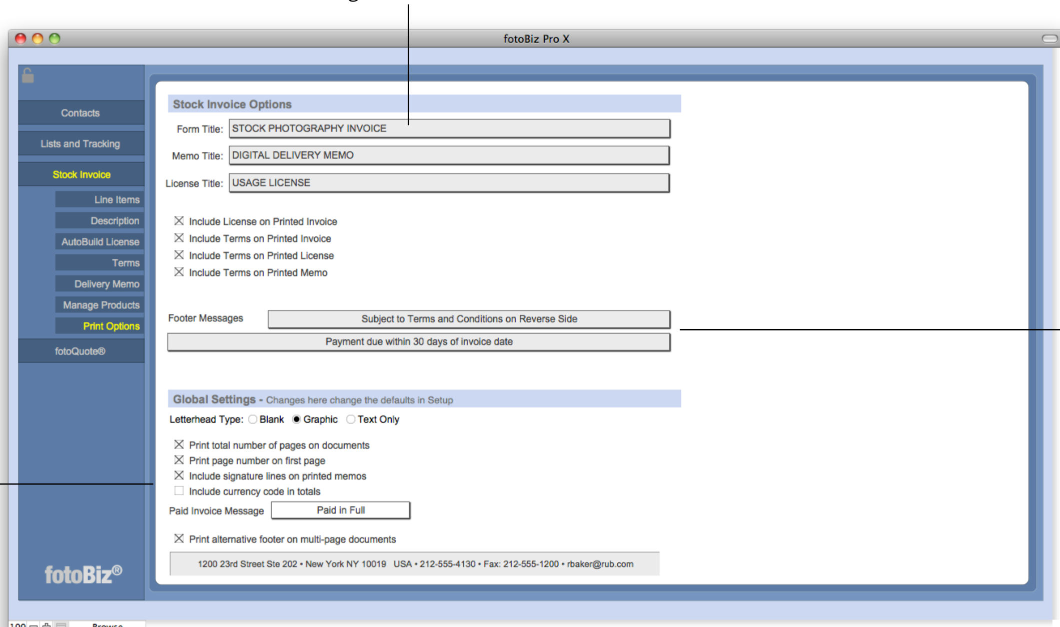
Entering your cost for each item provides you with valuable profit and loss reporting information on your Stock Productions.

Hint: Changes you make to existing products will apply only to newly added line items.

Print Options

Stock Invoice Printing Options: The printing options you select under Stock Invoice Print Options are only for the stock invoice you're working on. This allows you to customize the information you want displayed on your invoice per job or per client. The changes you make here do not affect your stock invoice default settings. If you want to make global changes to your stock invoice print options that apply to all invoices, go to Setup from the main Contacts screen and then choose the Stock Invoice tab under Settings and Defaults.

Click into the title field to view a list of options. Select Edit to make changes or additions



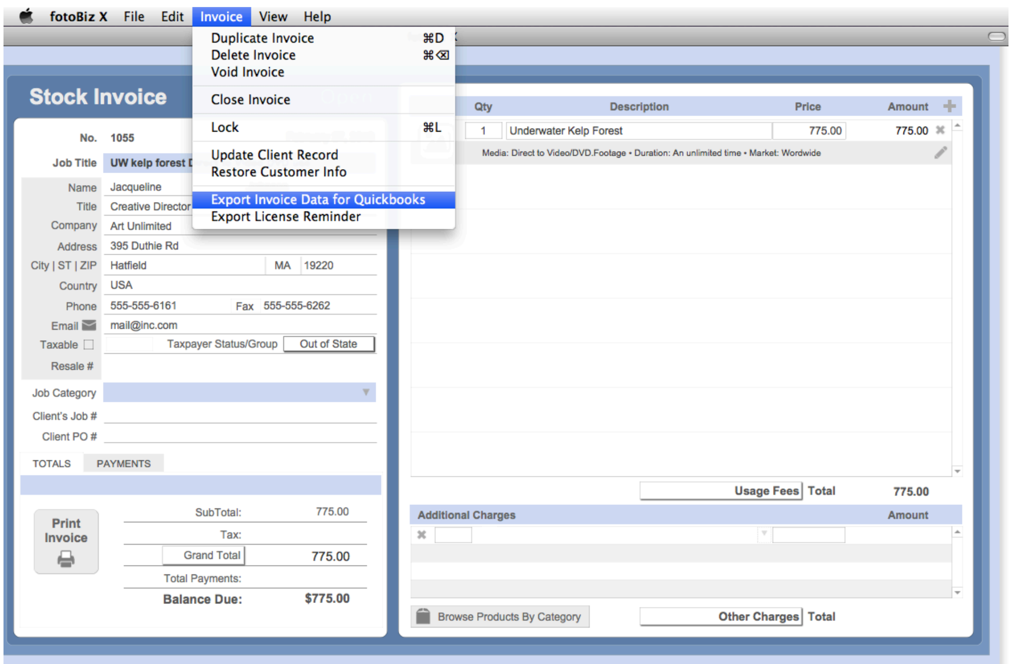
You have two lines for a footer message. Make your selections here or leave blank

Define what information you want printed on the Stock Invoice

Global Settings Print Options: The Global Settings apply to all stock invoices. The changes you make here will apply to all stock invoices.

Export Stock Invoice Data for QuickBooks

Exporting Individual Stock Invoice Data for QuickBooks: You're able to export any individual stock invoice data for import into QuickBooks. To do this you must be on the invoice record you wish to export. Select Invoice from the drop-down menu and then click on Export Invoice Data for Quickbooks. If you export an invoice that has not been paid you'll be asked if you want to enter payment and close the invoice.



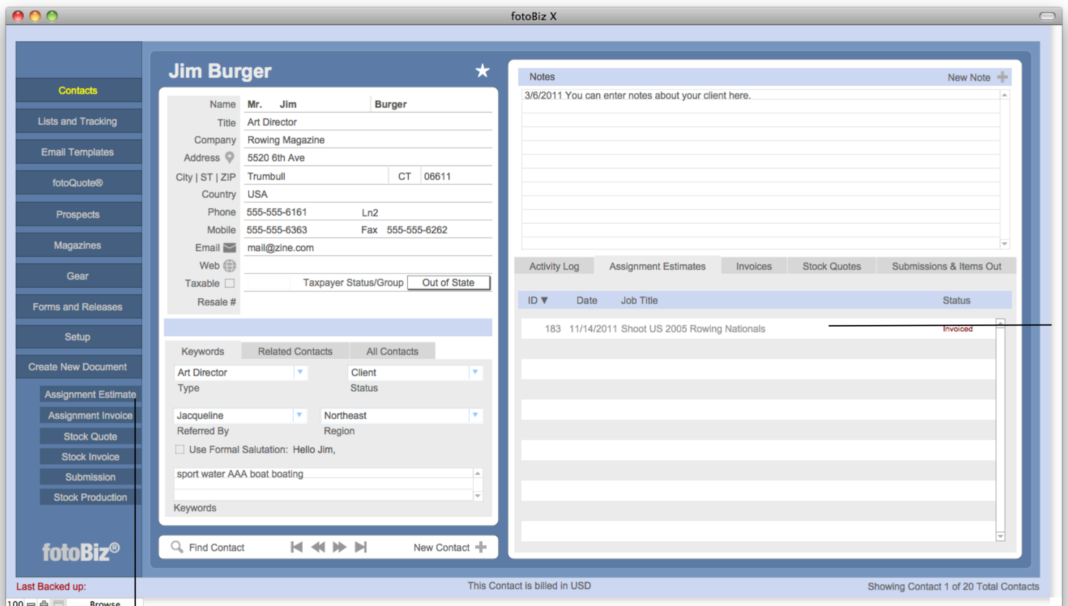
The first time you export data for QuickBooks, you'll be asked to set your QuickBooks account fields. The QuickBooks account field names must match the account names you have set up in QuickBooks. Once that is complete a file in .iif format for QuickBooks will be placed on your desktop. Use this file to import your data for this individual invoice into QuickBooks. Refer to your QuickBooks help manual for instructions on importing .iif files. We strongly recommend you test this on a backup copy of your QuickBooks Company first.

When you export data to QuickBooks, fotoBiz assumes the invoice has been paid. If you export an invoice that has not been marked as paid, after the export you'll be asked if you want to pay the invoice in full and close it out.

Hint: You can also export a grouping of invoice data for QuickBooks as one of the report action options in Lists and Tracking > Invoices. *See page 87 for details.*

Assignment Estimates

Creating an Assignment Estimate: Everything in fotoBiz begins with the client. To create an assignment estimate, you must either enter the new client or find the existing contact. You can conduct finds from either Lists and Tracking or Contacts. Once you locate the contact record select Assignment Estimate from the Create New Document menu at the left.



To select an existing estimate select the Assignment Estimate tab and make your selection from the list

Select Assignment estimate to create a new estimate

This will open a new assignment estimate that allows you to enter individual line items, a job description, licensing language and your terms.

Hint: You can duplicate or delete estimates from the Assignment drop-down menu. When you select duplicate you'll be given the option to assign the estimate to a new customer, an existing customer or the current customer.

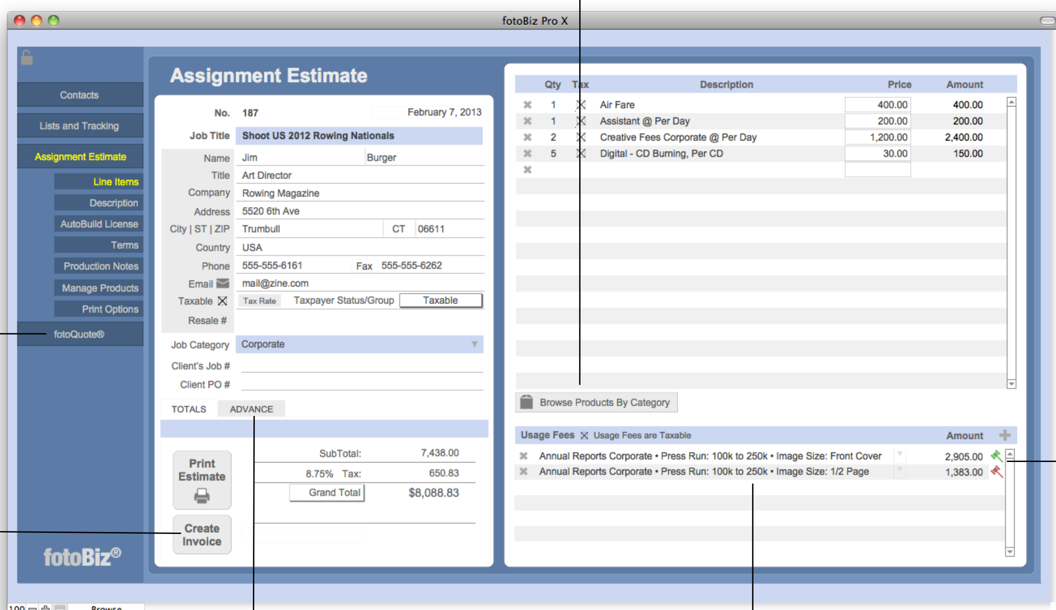
Adding Line Items

Adding Line Items: Line items can be added to the assignment estimate by clicking into the line item fields beginning with Qty or by selecting a product from the Browse Products by Category button. When you select the Browse Products by Category button a list of products appears at the left making it easy to select items from your existing products list. If you enter an item that's not in your products list, you'll be prompted to assign it a product type and category. This provides you with meaningful reporting data.

Select the Browse Products By Category button to add line items

Open fotoQuote here to add a usage fee directly from your fotoQuote pricing research

Create an assignment invoice with a click of a button



The gavels indicate whether or not you have a license associated with the usage fee. A green gavel indicates a license has been created, red does not

Click here to create an Advance Invoice. Language on the Advance Invoice is determined by the Settings and Defaults you created

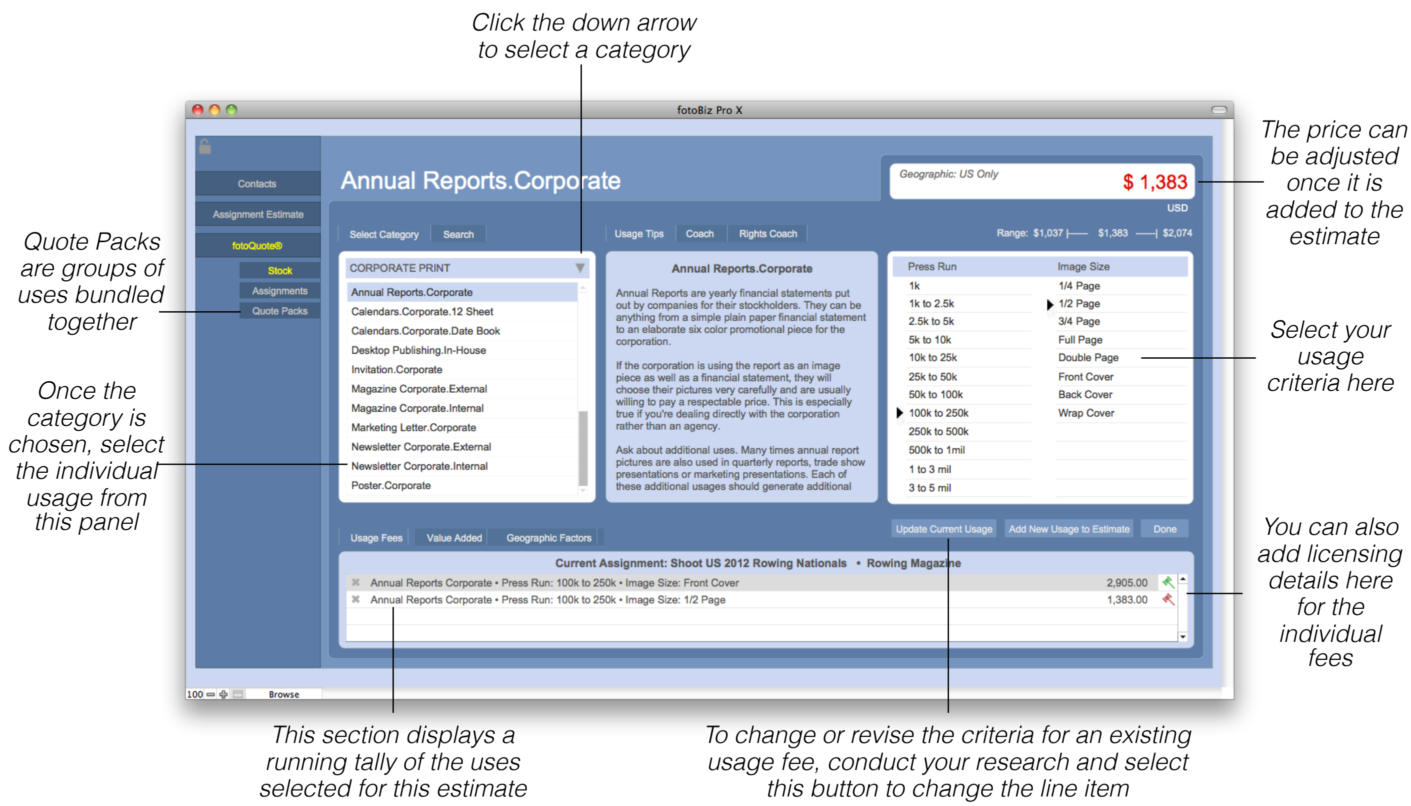
Add usage fees here either from fotoQuote or your products listing

Usage Fees: These are the fees associated with the usages you are granting for the images you create. These fees will be listed separately on the estimate. If you do not wish to list them as a separate line item then leave this section blank. To create a license for the individual usage, select the red gavel. This will open a dialog box with several drop-down menus from which you can build your license. If you added a usage fee from fotoQuote some of this information will be populated automatically.

Hint: If a client makes changes to your job after agreeing to the estimate you can create a Change Order from the Assignment drop-down menu.

fotoQuote for Assignments

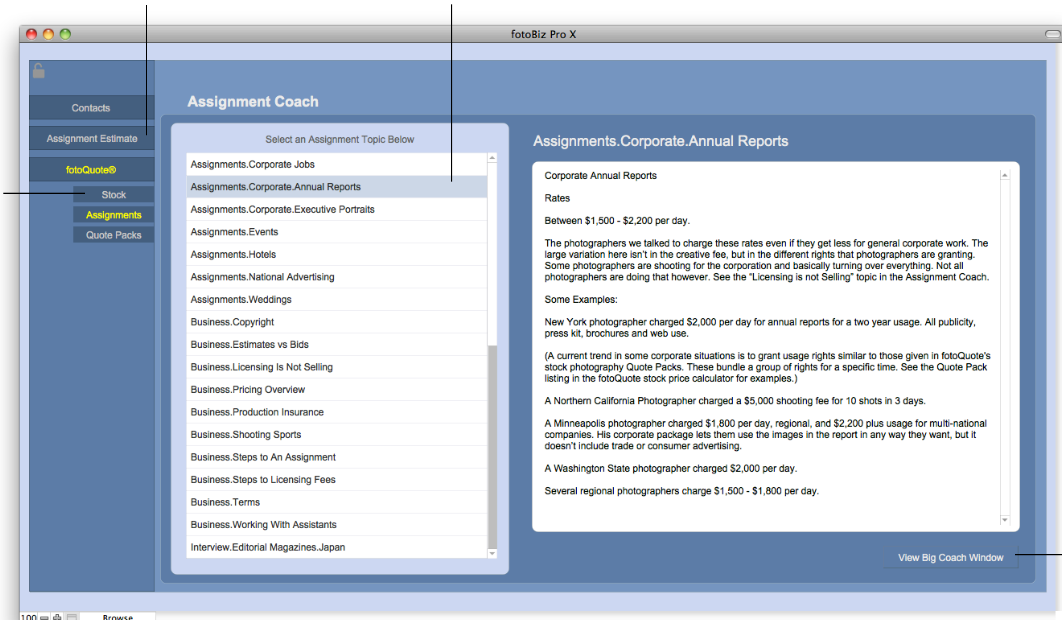
Using fotoQuote to Add Usage Fees: To add a usage fee from fotoQuote select fotoQuote from the menu to the left of the assignment estimate you are working on. This opens fotoQuote so you can conduct your pricing research and add usage fees to your estimate.



Usage Tips and Coach Tabs: In the center of the stock pricing screen you'll find three tabs: Usage Tips, Coach and Rights Coach. The Usage Tips provides you with additional information about the use you've selected along with additional negotiating tips. The Coach tips include valuable information on pricing and negotiation for a variety of topics like revisions, discounts and multi-website use. The Rights Coach deals with specific rights requests such as exclusivity, buyouts and textbook use.

fotoQuote for Assignments - Continued

Using fotoQuote for Assignment Fee Research: The Assignment Coach is rich with information about business practices, assignment pricing, creative fees, pricing strategies, and negotiation tips from nationally successful photographers. Here you'll find help and tips for pricing many types of assignments.

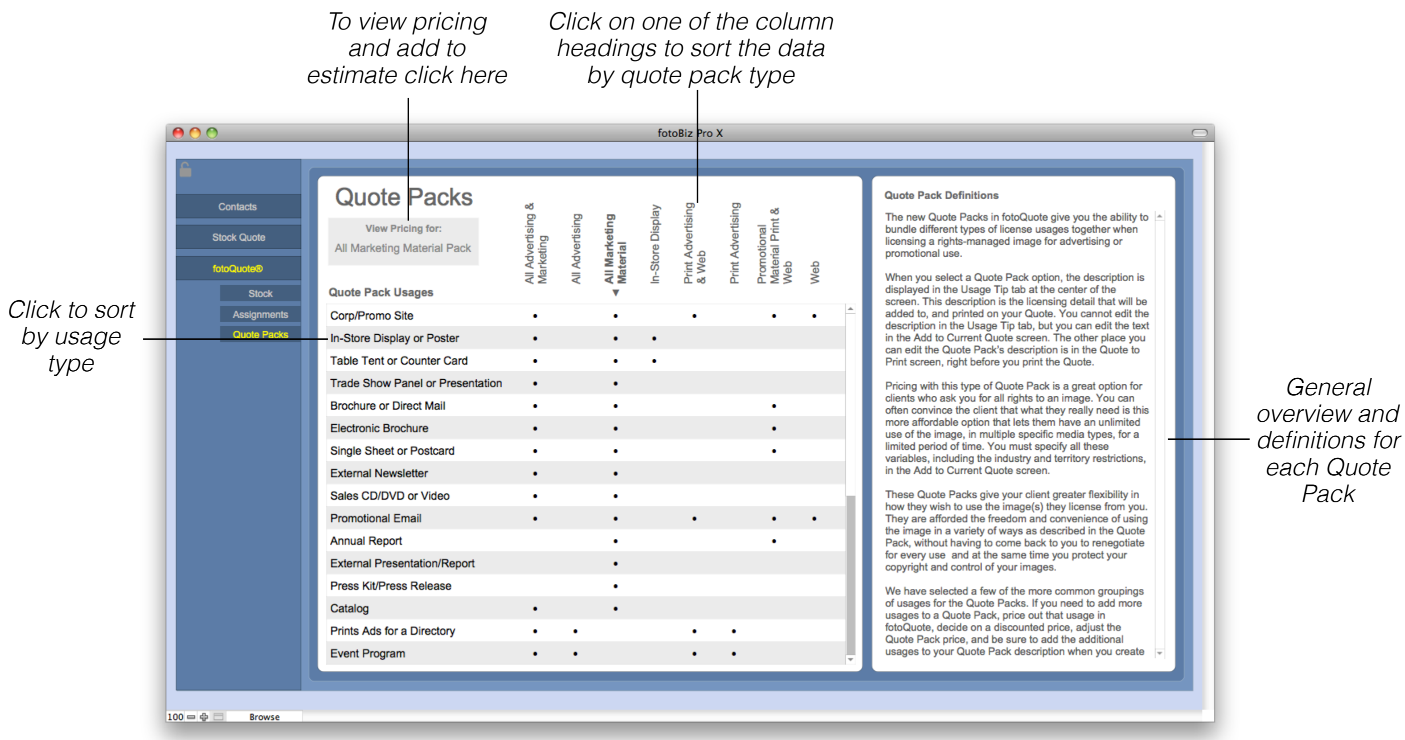


Information and prices in the Assignment Coach are based on interviews with assignment photographers throughout the US. The way that many assignment photographers use fotoQuote is to reference the coach material for assignment fees and then use the stock side to determine their usage. Apply the information here to help you determine what to charge for your time as well as other things like digital fees.

When you go back to the line items on your estimate you can manually adjust the existing product or create a new one based on your pricing research. See the section on Managing Products below for details on how to add and edit products.

fotoQuote for Assignments - Continued

Quote Packs: You can access the Quote Pack pricing from two places in fotoQuote, from the menu options in the fotoQuote section of the program, or from the Stock pricing section as one of the category selections. The chart below helps you see exactly what usages are included in each Quote Pack.

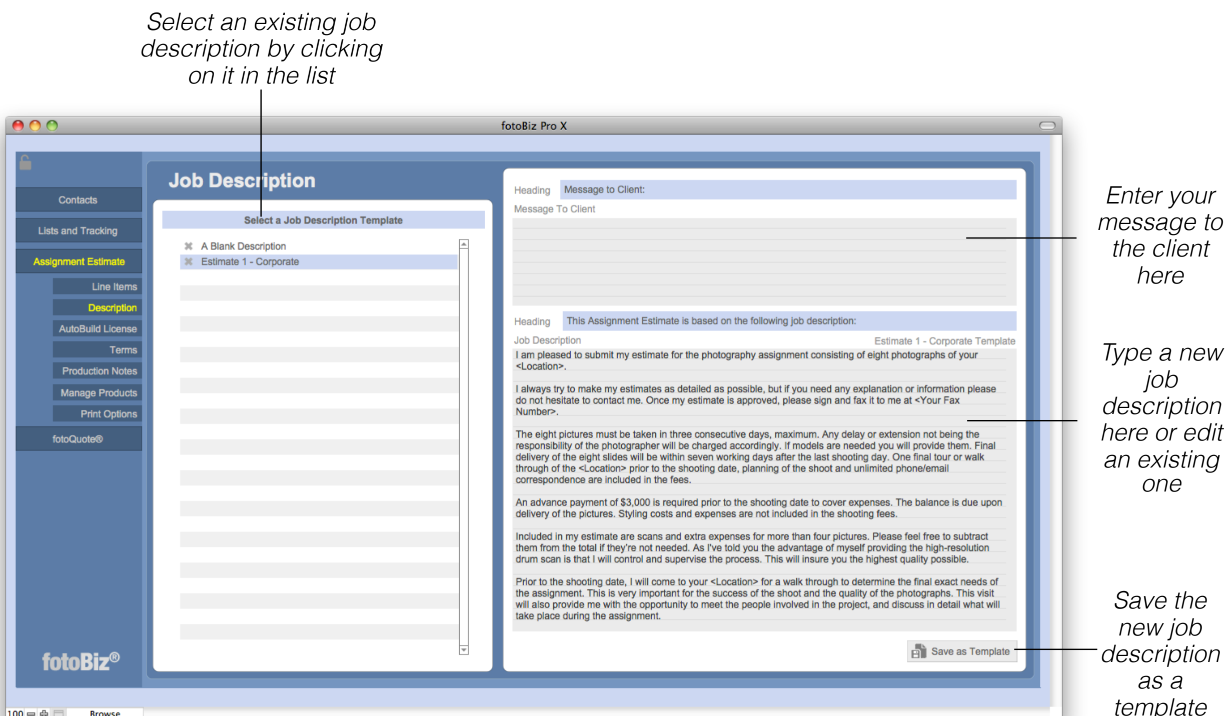


Quote Packs give you the ability to bundle different types of license usages together when licensing a rights-managed image for advertising or promotional use. Pricing with this type of Quote Pack is a great option for clients who ask you for all rights to an image. You can often convince the client what they really need is this more affordable option that lets them have an unlimited use of the image, in multiple specific media types, for a limited period of time.

These Quote Packs give your client greater flexibility in how they wish to use the image(s) they license from you. They're afforded the freedom and convenience of using the image in a variety of ways as described in the Quote Pack, without having to come back to you to renegotiate for every use. At the same time you protect your copyright and maintain control of your images.

Adding a Job Description

Adding a Job Description: You have two description text field options. In this first section you can include a message to the client that will print out on the assignment estimate. This might include important information that is not necessarily specific to the job description. When left blank this section will not print. Use the second larger section to include your description of the job, project description, service provided, etc.

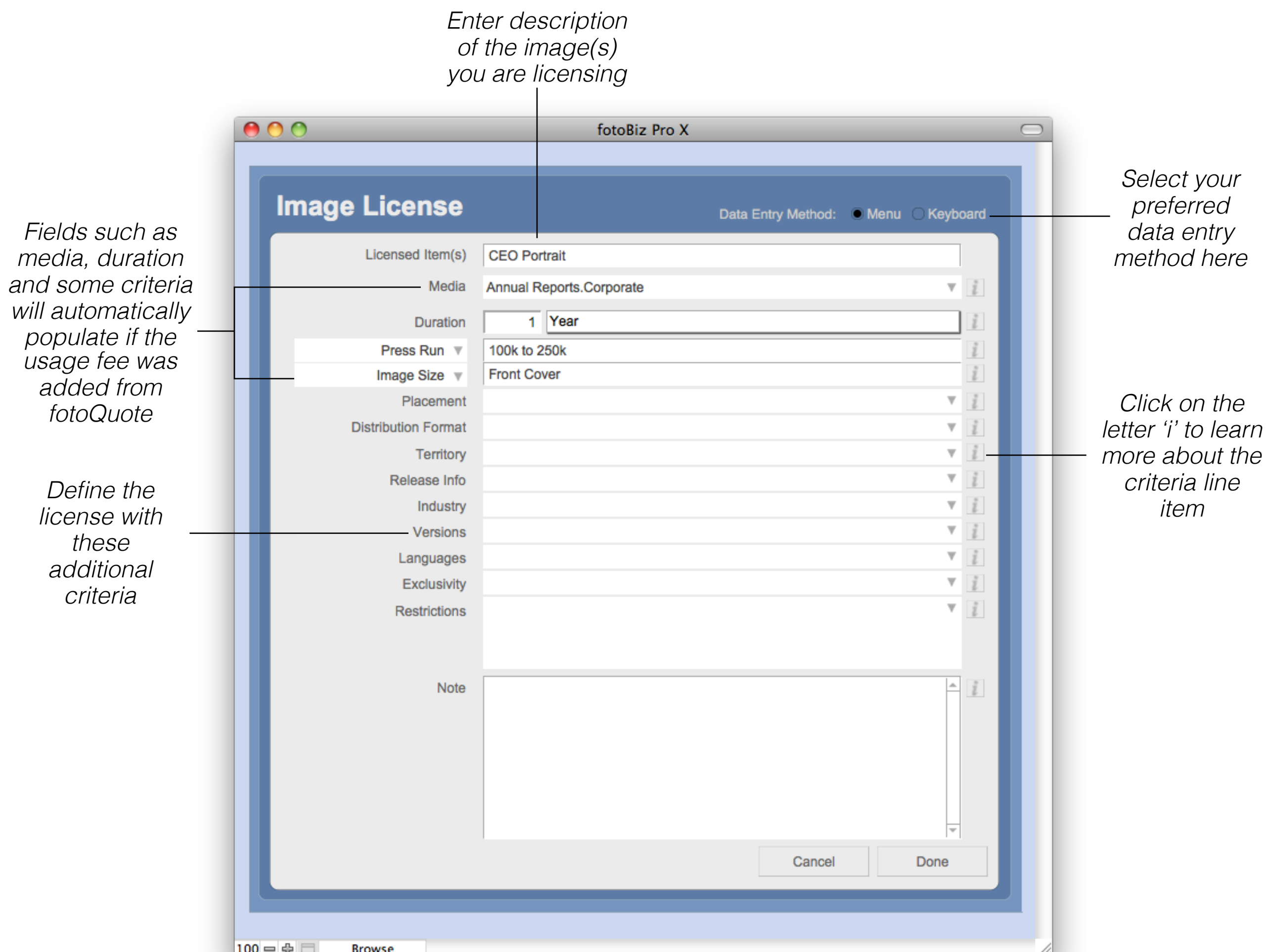


As you create job descriptions that you may use again in the future you can select the Save as Template button from the lower right to store different types of job descriptions. When you need it again for a similar job just call up that template by selecting it from the list on the left. Then you'll be able to make any needed changes for the conditions of your current job.

To change or edit the Heading title for either text field click on the blue line to bring up a list of menu options. To add a new Heading select Edit, add your text and then click in the blue line again to select your new entry.

Creating a License

Adding Licenses: In this version of fotoBiz you're able to add licenses to individual usage fees for the assignment work you do. To add a license for a specific Usage Fee line item select the red gavel next to the Usage Fee on your assignment estimate. When you select a red gavel you'll be given the option to create an Image License. If you've added a usage fee directly from fotoQuote some of these fields are filled out automatically. Use the other fields such as placement, territory, versions, exclusivity, etc. to further define the license you're granting.



Data Entry Method: There are two ways in which you can enter the details of your license. The Keyboard method allows you to tab and type from field to field. With the Menu option you'll need to select the drop-down arrow or click into the field to make your selection.

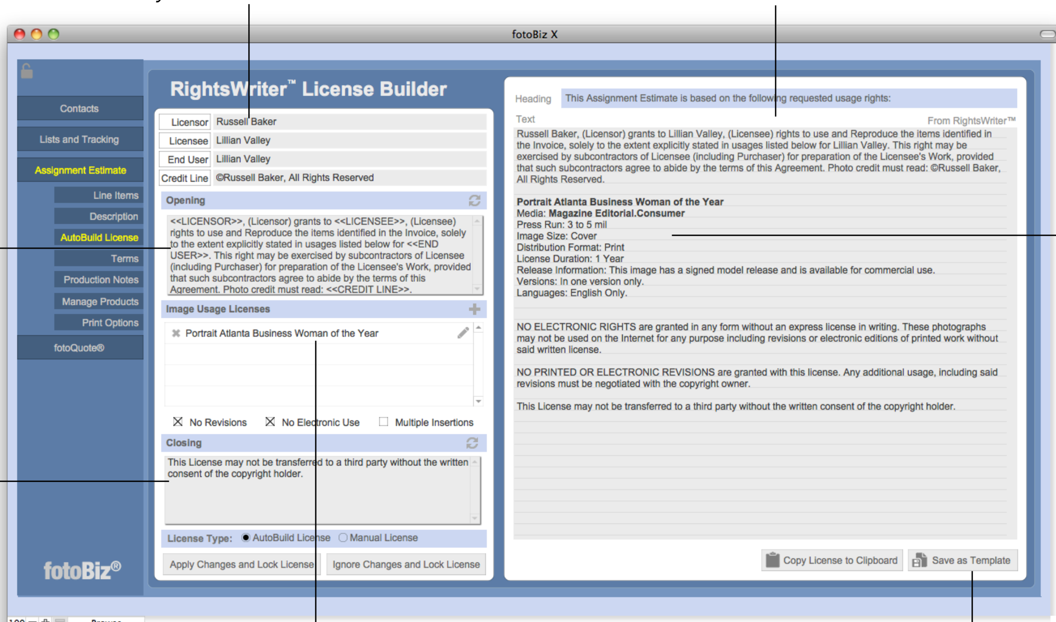
Creating a License - Continued

Creating an AutoBuild License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the AutoBuild License feature. Deciding what rights to grant with your license is an important part of pricing your images. The RightsWriter feature helps you build your licensing agreement.

These fields will populate automatically based on the default settings selected, they can be edited here

This is your license preview screen based on the information on the left

This information pulls from your assignment estimate default settings. Select the refresh button to reset the original text



The license details are pulled from the usage fee line items on the estimate with a gavel that is green

Individual line items with a green gavel will be listed here

Save the new license as a template to select later as a Manual License

Merge Fields: The Licensee, End User, Licensor and Credit Line are all merge fields that you can insert into the Opening or Closing paragraphs. To insert one of these fields, place your cursor where you want the merge field to appear and click the button adjacent to that item. This automatically adds the contents of that field to your license.

An AutoBuild license takes the information you've already entered about the image usage and builds a license for you automatically. If you want to format your license differently or add additional information you would want to use the ManualBuild license instead.

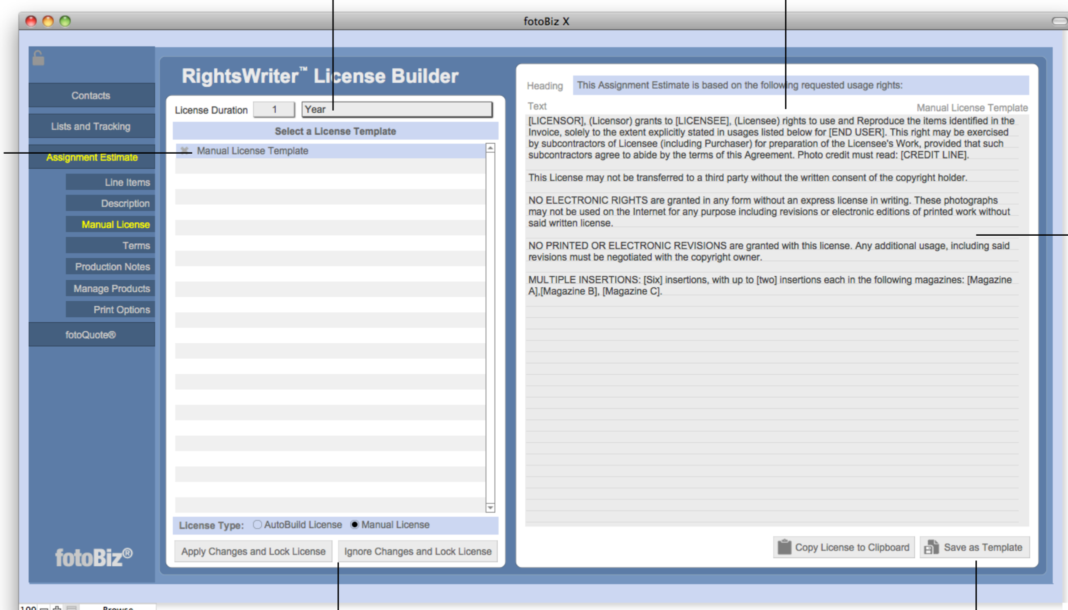
Creating a License - Continued

Creating an Manual License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the Manual License feature. It's important to state clearly exactly what rights you are basing the estimate on. Stating your terms of doing business clearly and consistently is your best defense against the client trying to dictate your terms for you.

Enter your license duration here. Use the drop-down menu to specify, year, month, day, etc.

This is your license preview screen based on the Manual License selection on the left

Select a starter template from this panel



Changes made here will not affect the original template

You cannot print an estimate with a license that us unlocked. Select one of these options to lock your license

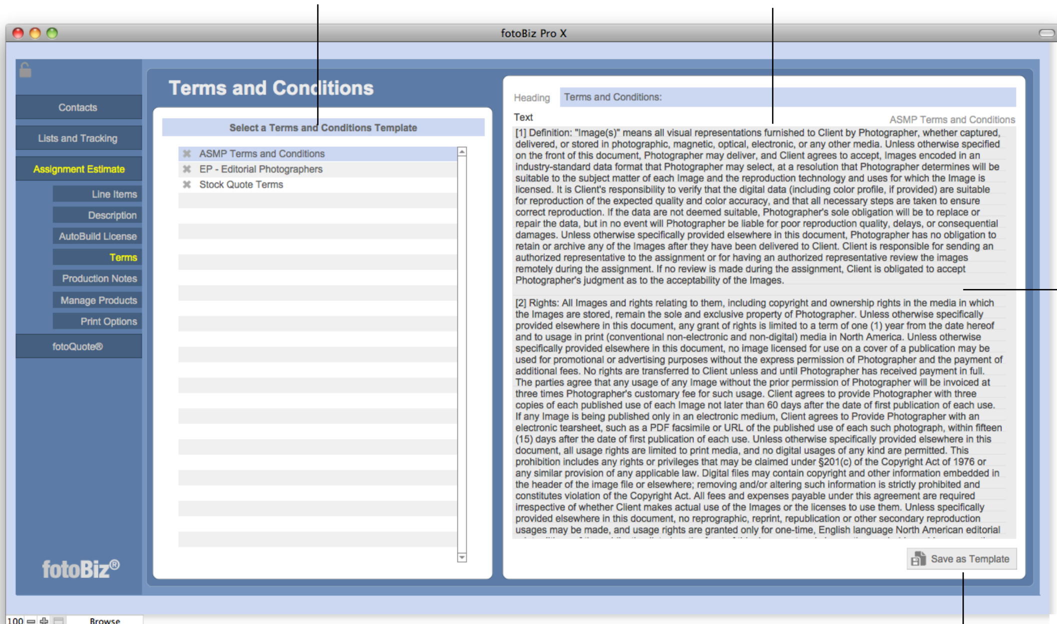
Save the new license as a template to select later as a Manual License

A Manual License is used when you want to customize the way the license information is presented or if you want to use a license template. It's not possible to track specific image licenses with a manual license, if you want to do so you must use the AutoBuild license.

Hint: For assignment estimates that are not accepted or expire, you are able to mark them as inactive by selecting this option from Quote drop-down menu.

Terms and Conditions

Selecting Terms and Conditions: The default terms and conditions you identified as part of setting up your templates will automatically be displayed here. You can select a different set of terms from the list on the left or make edits in the window to the right.

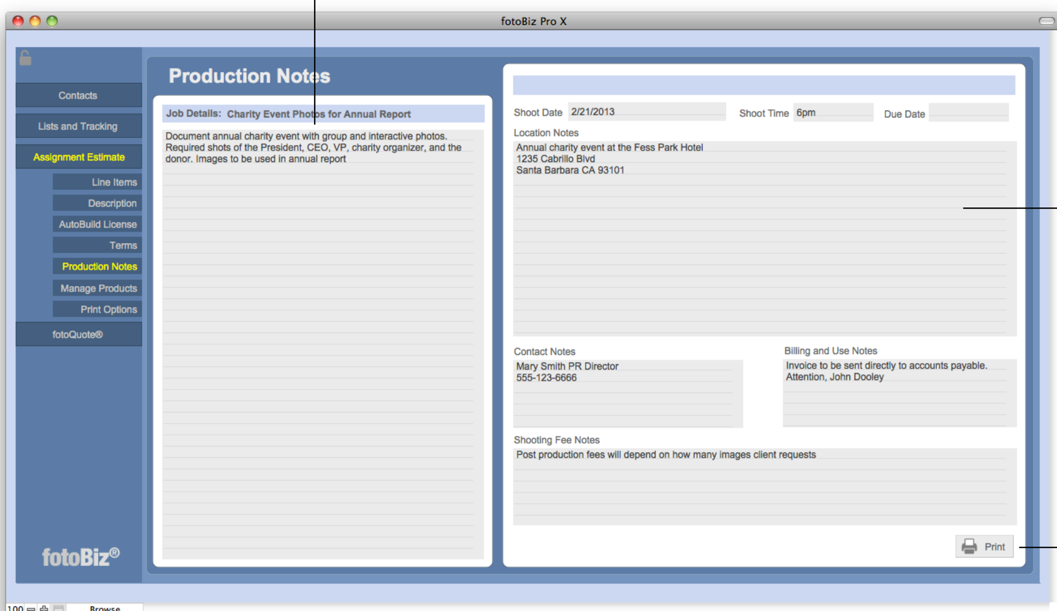


The Terms and Conditions included in the program for some of the professional organizations were the most current at the time fotoBiz was being upgraded. Be sure to check you’re using the latest version recommended by these respective organizations.

Hint: To add a new set of Terms and Conditions go to Setup > Templates > Terms, select the plus (+) sign from the top of the terms listing or choose New Template from the File drop-down menu.

Production Notes

Production Notes: Include details about the assignment; general notes about the job and specific information about the shoot location, contact information, shoot date, shoot time, etc. Because the line items and pricing information from the estimate will not be included, the Production Notes worksheet can be used as a crew call sheet that can be sent to assistants, talent and crew.



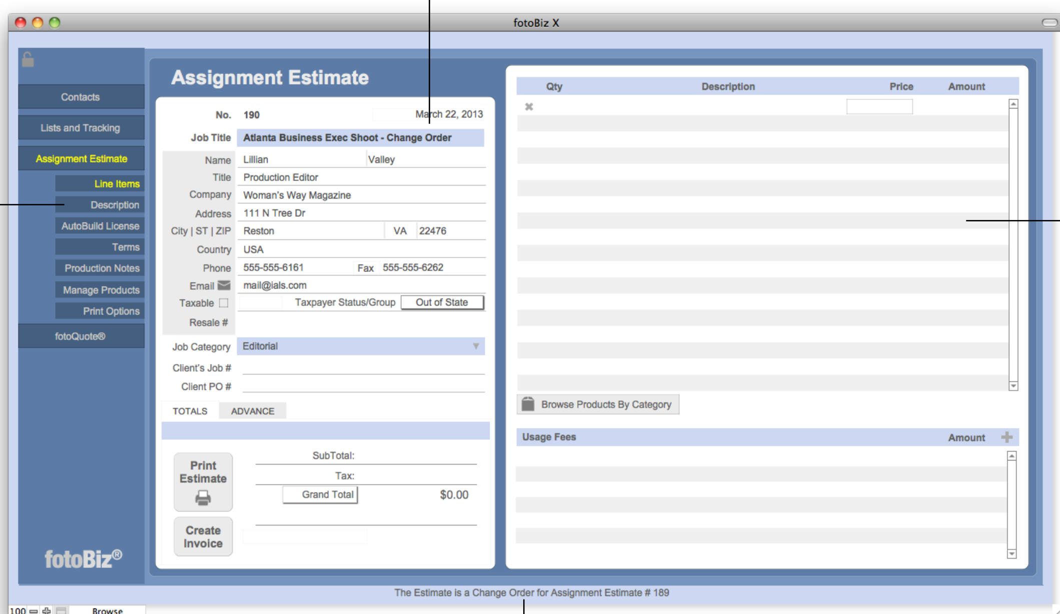
Print the production notes and give them to your crew so everyone is aware of the job details, shoot date, call times, location, etc.

Assignment Change Order

Assignment Change Order: The Change Order is a document that is used for changing an agreed to assignment estimate: usually adding additional expenses and shooting requirements, and getting the client to agree to pay for those changes. The Change Order doesn't replace your original signed estimate, but extends it to include the new changes to the job. To create a change order select Assignment from the file menu and choose Create Change Order from the drop-down menu.

Add "Change Order" to the title of your new estimate

Select Description to include details about the changes your client is requesting



Add your new line items to reflect the changes to the job

The original estimate will be referenced here

Fill out the Change Order with ONLY the changes that you'll be making. It is a COMPLETELY NEW Assignment Estimate, based on your original worksheet. You must create a separate invoice for this Change Order as it's considered to be a separate document in terms of billing and payments. Create a new Invoice for each Change Order, and post payments for the Change Order to that new Invoice or manually add the items to your original job Invoice.

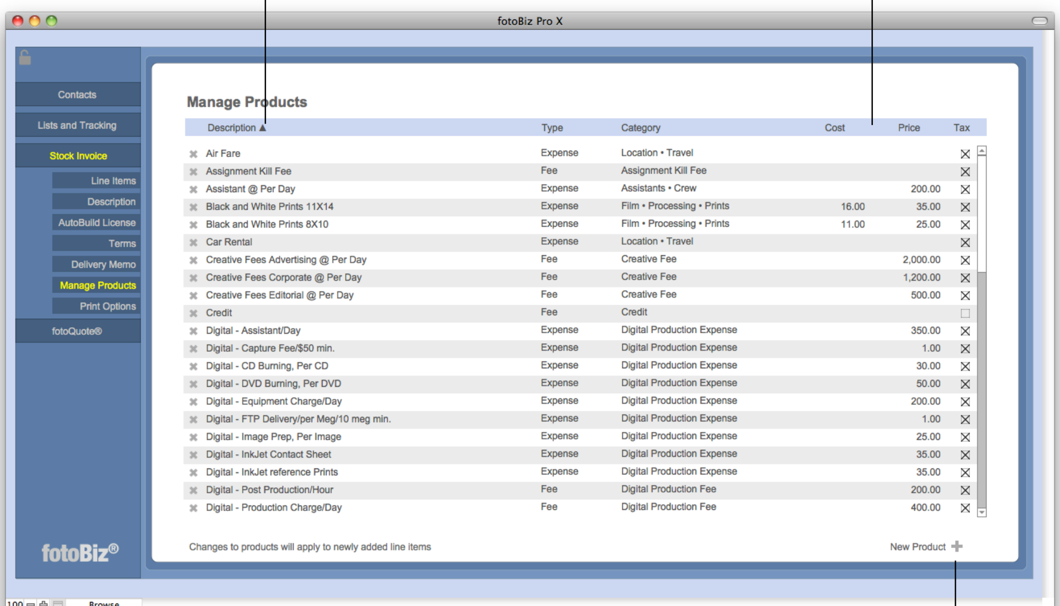
Hint: Because the Change Order is an Assignment Estimate, it can be viewed with all other Assignment Estimates. Adding "Change Order" to the Job Title will make it easy to distinguish the change order from the original assignment estimate.

Managing Products

Managing Products: You can manage your products from three separate places in fotoBiz. Select the Manage Products menu item from either Stock Quotes, Assignments or Invoices. When you select New Product from the lower right corner you will be presented with a dialog box to complete your entry. Complete the description, type and category and indicate whether the item is taxable or not then select OK.

Sort your product list by selecting the ascending or descending arrow

Enter the cost you incur for the item and the price you charge in these columns



Add a new product here

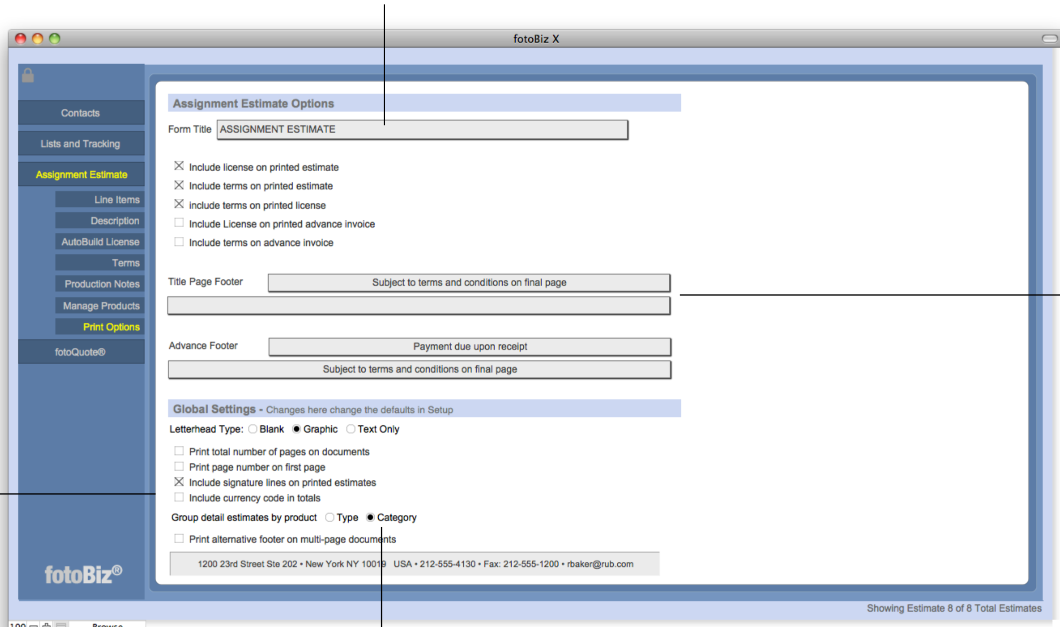
Entering your cost for each item will provide you with valuable profit and loss reporting information on your Stock Productions.

Hint: Changes you make to existing products will apply only to newly added line items.

Print Options

Assignment Estimate Printing Options: The printing options you select under Assignment Estimate Options are only for the estimate you're working on. This allows you to customize the information you want displayed on your estimate per job or per client. The changes you make here do not affect your Assignment Estimate default settings. If you want to make global changes to your Assignment Estimate print options that apply to all estimates, go to Setup from the main Contacts screen and then choose the Assignment Estimate tab under Settings and Defaults.

Click into the title field to view a list of options. Select Edit to make changes or additions



You have two lines for a footer message. Make your selections here or leave blank

Define what information you want printed on the Assignment Estimate

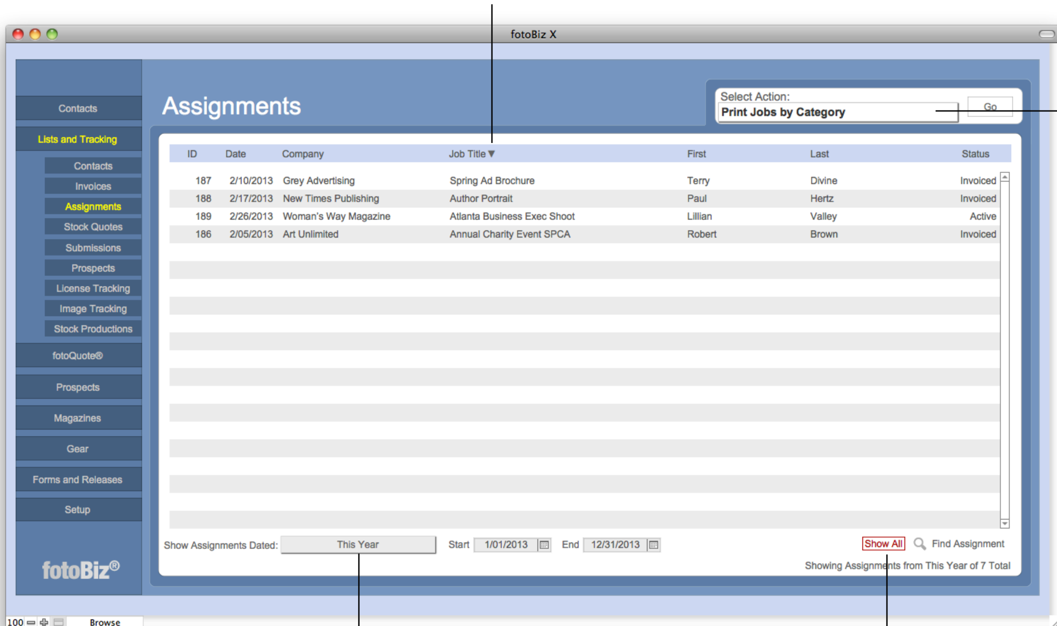
Choose how you want the line items grouped on your detail assignment estimate

Global Settings Print Options: The Global Settings apply to all assignment estimates. The changes you make here will apply to all assignment estimates.

Assignment Lists and Reporting

Finding Assignment Estimates: Working with your assignment estimates is similar to how you work with your stock quote lists. Each column has a descending and ascending sort order. To conduct a search for a specific set of assignments select Find Assignment from the lower right corner or select Find Assignment from the Assignments drop-down menu.

Click next to each column header to sort the list ascending or descending



Select an action to Print Jobs by Category or by Company

Filter your quotes by various date ranges

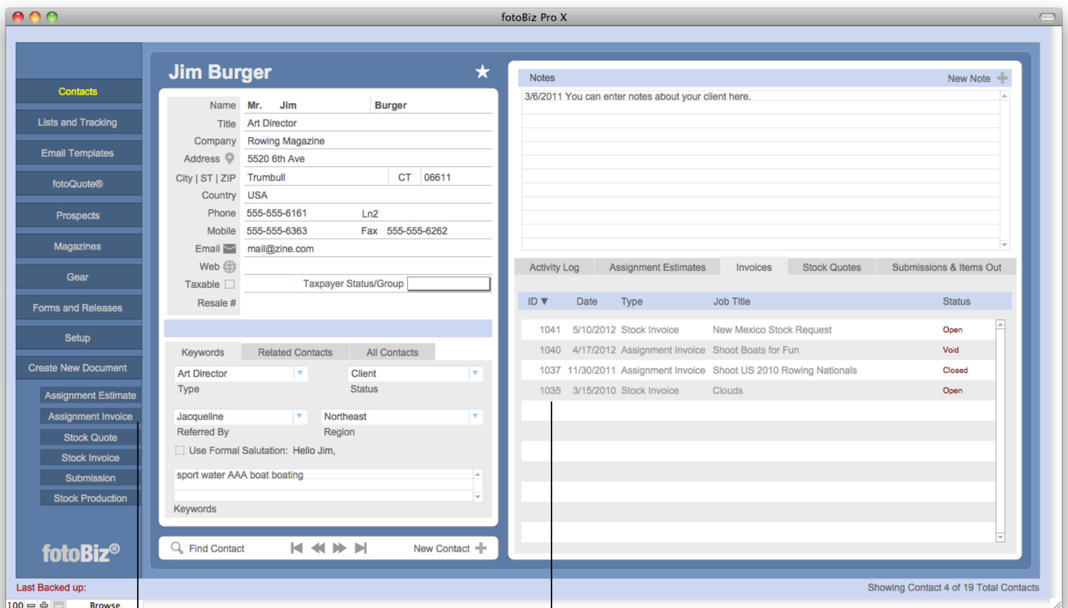
Select Show All to reset the found set

Assignment Estimate Reporting: You're able to print reports of your assignment estimates by company or by category such as advertising, editorial, corporate, etc. The action you select from the upper right corner will print the current found set displayed on the screen. You'll then have the option to print all assignments in that found set or only those invoiced or active.

Assignment Estimate Browsing: When you select an estimate from the displayed list you can quickly browse through those estimates by selecting View from the menu bar or by using the Command and arrow keys to indicate the first, last, next or previous estimate.

Assignment Invoices

Creating an Assignment Invoice: You can create an assignment invoice a couple of ways. If you've already created an assignment estimate (see page 47 above) you can simply select the Create Invoice button from the assignment estimate itself. This is the quickest, easiest way to create an assignment invoice. To create an assignment invoice without having first created an assignment estimate, select Assignment Invoice from the Create New Document menu at the left.



Select Assignment Invoice to create a new invoice

To open an existing invoice for this contact make your selection from the list

Hint: Remember that everything in fotoBiz begins with the client. So in order to create a new Assignment Invoice you'll need to first find the client's record. See page 19 for more information on conducting finds for contacts.

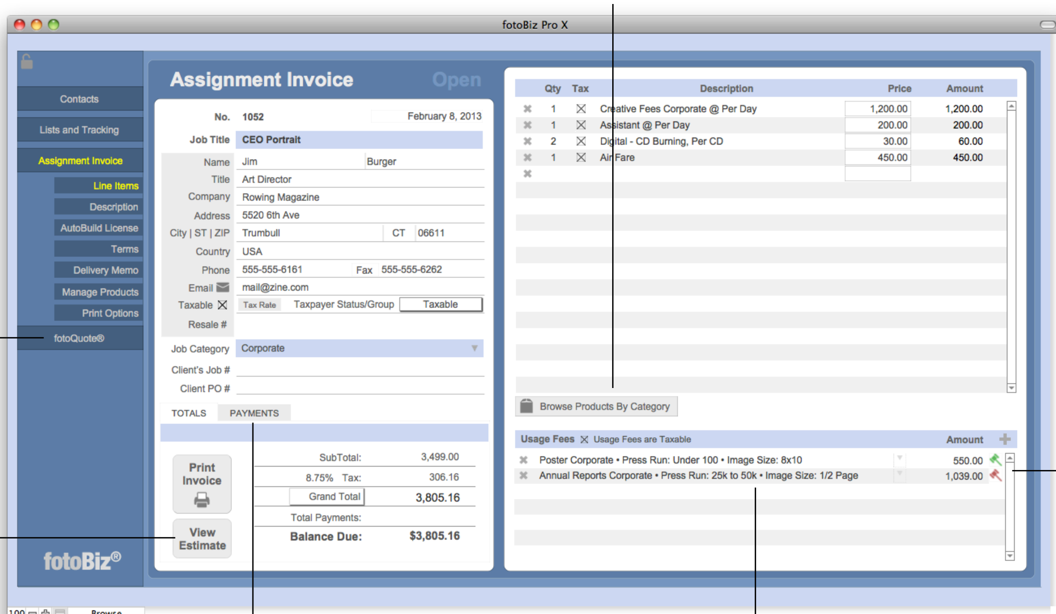
Adding Line Items

Adding Line Items: When you select the Create Invoice button from an existing Assignment Estimate, any image line items on the estimate will also be on the invoice. Edit or delete line items from the invoice before printing it. When you select the Browse Products by Category button a list of products will appear at the left making it easy to select items from your existing products list. If you enter an item that is not in your products list, you will be prompted to assign it a product type and category. This provides you with meaningful reporting data.

Select the Browse Products By Category button to add line items

Open fotoQuote here to add a usage fee directly from your fotoQuote pricing research

Click here to view the original estimate



The gavels indicate whether or not you have a license associated with the usage fee. A green gavel indicates a license has been created, red does not

Enter payments by selecting the Payments tab

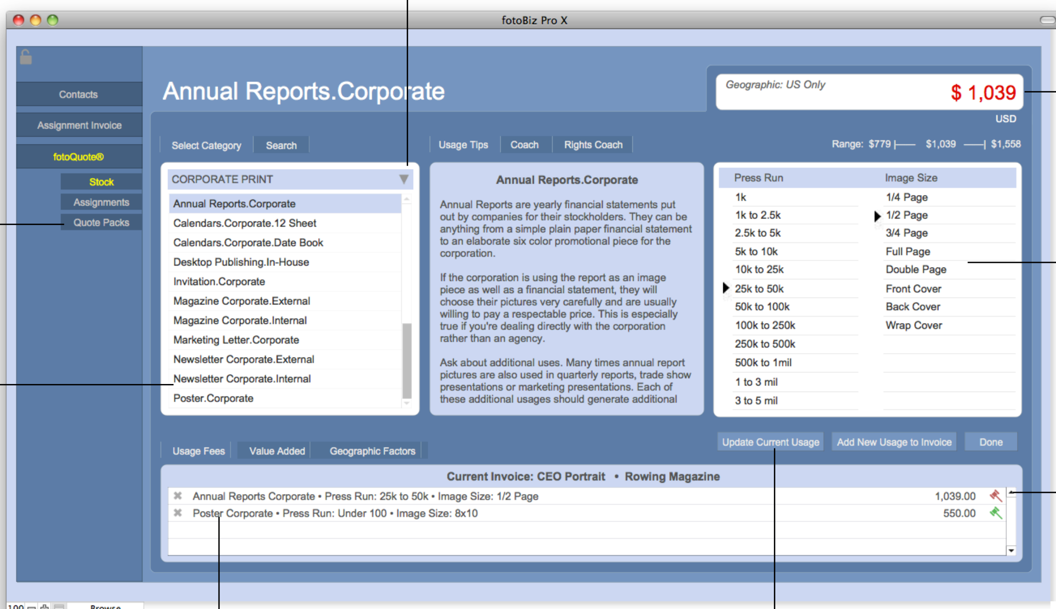
Add usage fees here either from fotoQuote or your products listing

Usage Fees: These are the fees associated with the usages you are granting for the images you create. These fees will be listed separately on the invoice. If you do not wish to list them as a separate line item then leave this section blank. To create a license for the individual usage, select the red gavel. This will open a dialog box with several drop-down menus from which you can build your license. If you added a usage fee from fotoQuote some of this information will be populated automatically.

Hint: Any existing usage fee from fotoQuote can be updated and automatically adjusted by selecting the Update Current Usage button from the fotoQuote screen.

fotoQuote for Assignments

Using fotoQuote to Add Usage Fees: To add a usage fee from fotoQuote, select fotoQuote from the menu to the left of the assignment invoice you're working on. This opens fotoQuote so you can conduct your pricing research and add usage fees to your invoice.



Usage Tips and Coach Tabs: In the center of the stock pricing screen are three tabs: Usage Tips, Coach and Rights Coach. The Usage Tips will provide you with additional information about the use you've selected along with additional negotiating tips. The Coach tips include valuable information on pricing and negotiation for a variety of topics like revisions, discounts and multi-website use. The Rights coach deals with specific rights requests such as exclusivity, buyouts and textbook use.

Hint: Quote Packs give you the ability to bundle different types of license usages together when licensing a rights-managed image for advertising or promotional use. See the Quote Pack section below for more information.

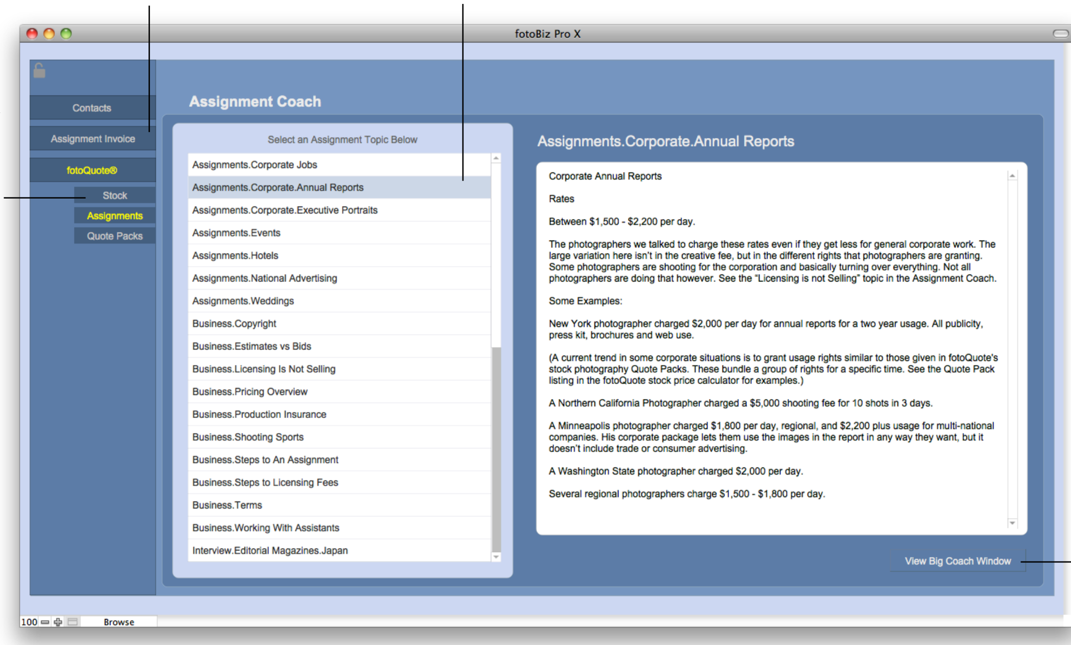
fotoQuote for Assignments - Continued

Using fotoQuote for Assignment Fee Research: The Assignment Coach is rich with information about business practices, assignment pricing, creative fees, pricing strategies, and negotiation tips from nationally successful photographers. Here you'll find help and tips for pricing many types of assignments.

Click on Assignment Invoice to return to the invoice worksheet

Select the coach topic here to see the details to the right

Select Stock to return to the usage fees associated with this invoice



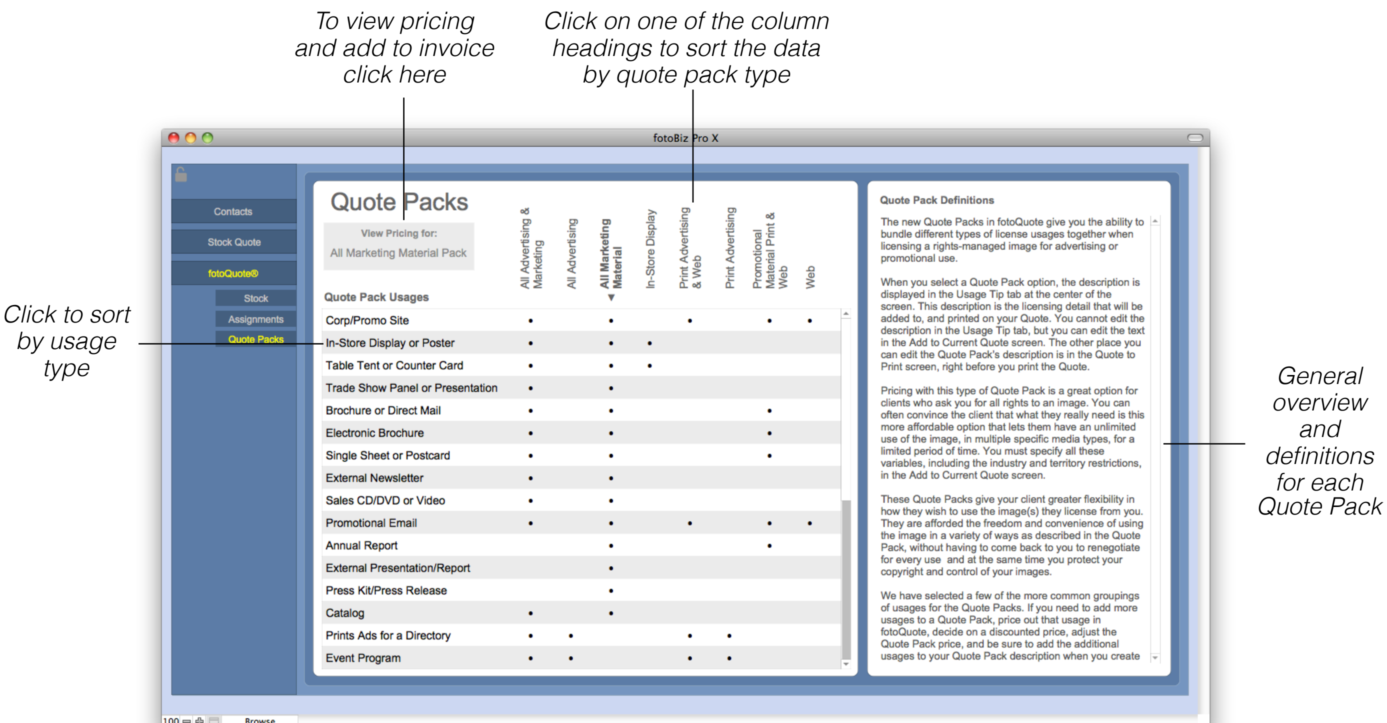
Click here to expand the coach topic

Information and prices in the Assignment Coach are based on interviews with assignment photographers throughout the US. The way many assignment photographers use fotoQuote is to reference the coach material for assignment fees and then use the stock side to determine their usage. Apply the information here to help you determine what to charge for your time as well as other things like digital fees.

When you go back to the line items on your invoice you can manually adjust the existing product or create a new one based on your pricing research. See the section on Managing Products for details on how to add and edit products.

fotoQuote for Assignments - Continued

Quote Packs: You can access the Quote Pack pricing from two places in fotoQuote, from the menu options in the fotoQuote section of the program, or from the Stock pricing section as one of the category selections. The chart below helps you see exactly what usages are included in each Quote Pack.



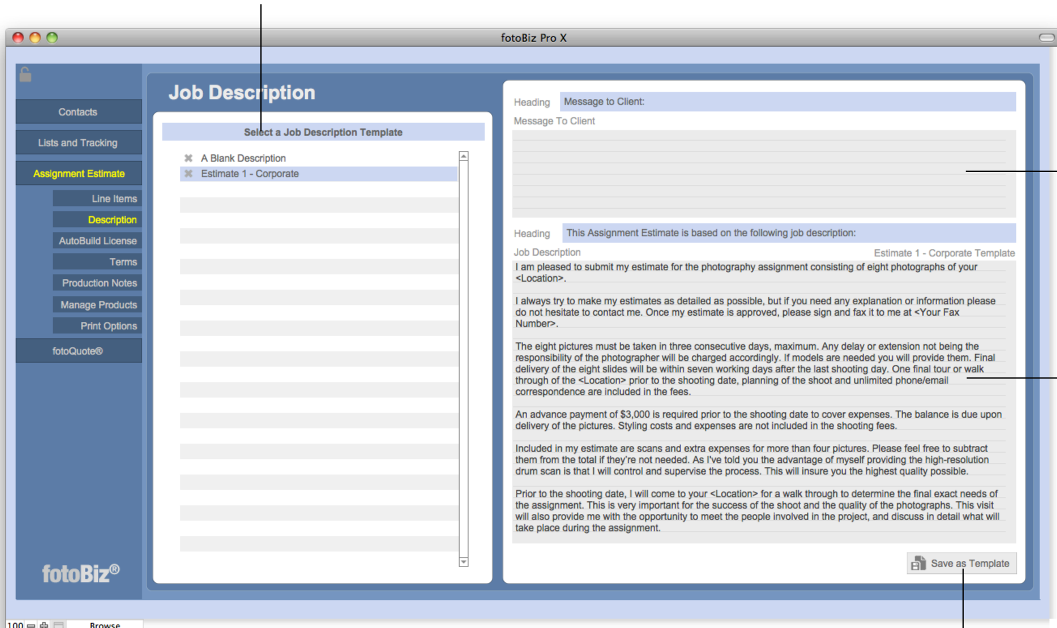
Quote Packs give you the ability to bundle different types of license usages together when licensing a rights-managed image for advertising or promotional use. Pricing with this type of Quote Pack is a great option for clients who ask you for all rights to an image. You can often convince the client that what they really need is this more affordable option that lets them have an unlimited use of the image, in multiple specific media types, for a limited period of time.

These Quote Packs give your client greater flexibility in how they wish to use the image(s) they license from you. They're afforded the freedom and convenience of using the image in a variety of ways as described in the Quote Pack, without having to come back to you to renegotiate for every use. At the same time you protect your copyright and maintain control of your images.

Adding a Job Description

Adding a Job Description: You have two description text field options. In this first section you can include a message to the client that will print out on the assignment invoice. This might include important information that is not necessarily specific to the job description. When left blank this section will not print. Use the second larger section to include your description of the job, project description, service provided, etc.

Select an existing job description by clicking on it in the list



Enter your message to the client here

Type a new job description here or edit an existing one

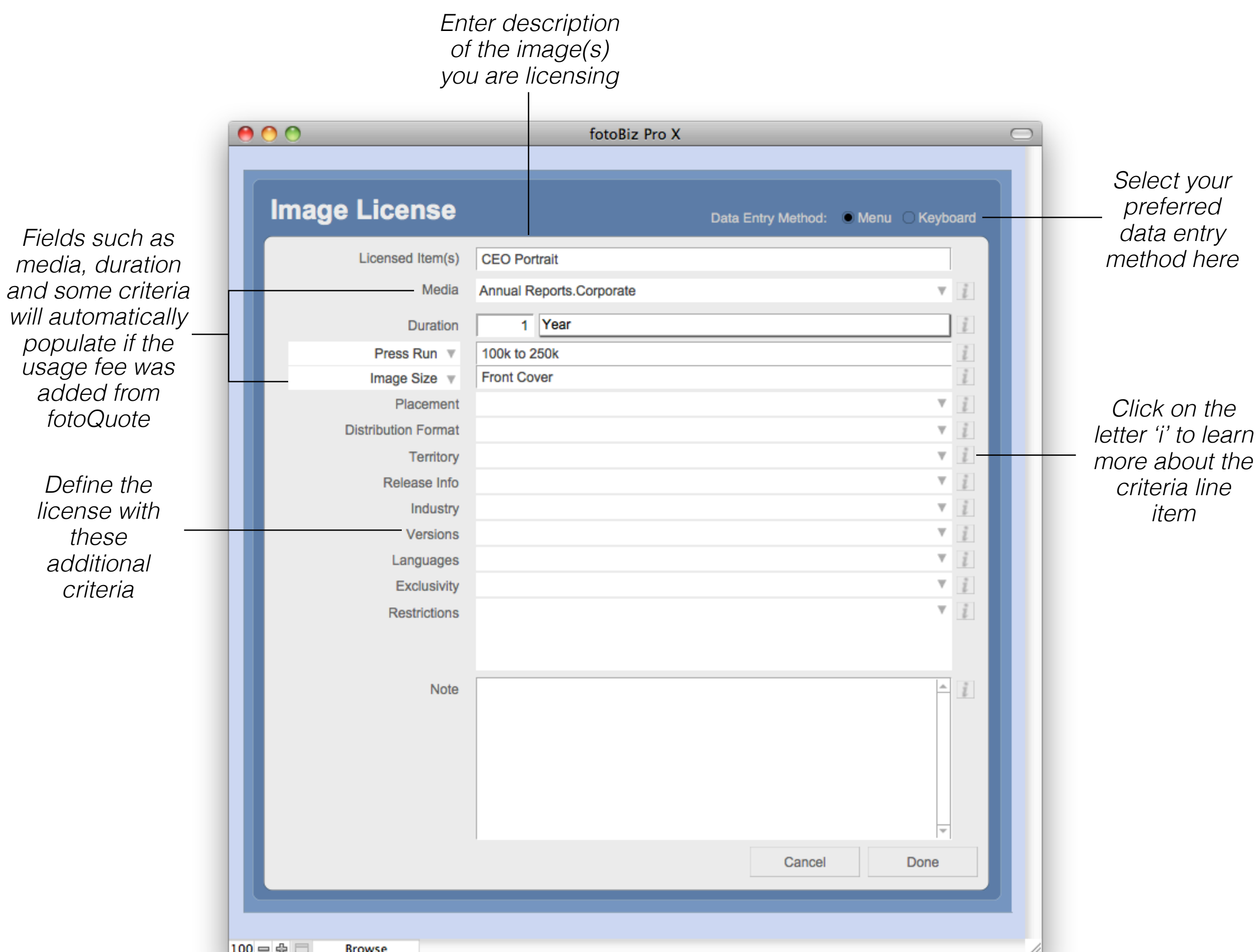
Save the new job description as a template

As you create job descriptions that you may use again in the future you can select the Save as Template button from the lower right to store different types of job descriptions. When you need it again for a similar job just call up that template by selecting it from the list on the left. Then you'll be able to make any needed changes for the conditions of your current job.

To change or edit the Heading title for either text field click on the blue line to bring up a list of menu options. To add a new Heading select Edit, add your text and then click in the blue line again to select your new entry.

Creating a License

Adding Licenses: In this version of fotoBiz you're able to add licenses to individual usage fees for the assignment work you do. To add a license for a specific Usage Fee line item select the red gavel next to the Usage Fee on your assignment invoice. When you select a red gavel you will be given the option to create an Image License. If you've added a usage fee directly from fotoQuote some of these fields are filled out automatically. Use the other fields such as placement, territory, versions, exclusivity, etc. to further define the license you are granting.



Data Entry Method: There are two ways in which you can enter the details of your license. The Keyboard method allows you to tab and type from field to field. With the Menu option you'll need to select the drop-down arrow or click into the field to make your selection.

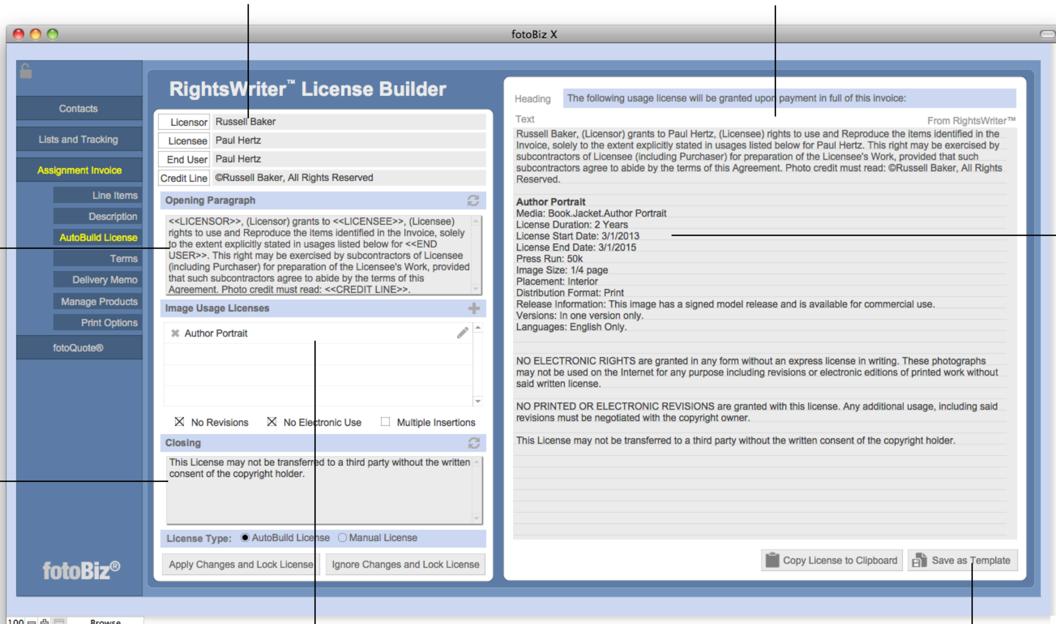
Creating a License - Continued

Creating an AutoBuild License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the AutoBuild License feature. Deciding what rights to grant with your license is an important part of pricing your images. The RightsWriter feature helps you build your licensing agreement.

These fields will populate automatically based on the default settings selected, they can be edited here

This is your license preview screen based on the information on the left

This information pulls from your assignment estimate default settings. Select the refresh button to reset the original text



The license details are pulled from the usage fee line items on the estimate with a gavel that is green

Individual line items with a green gavel will be listed here

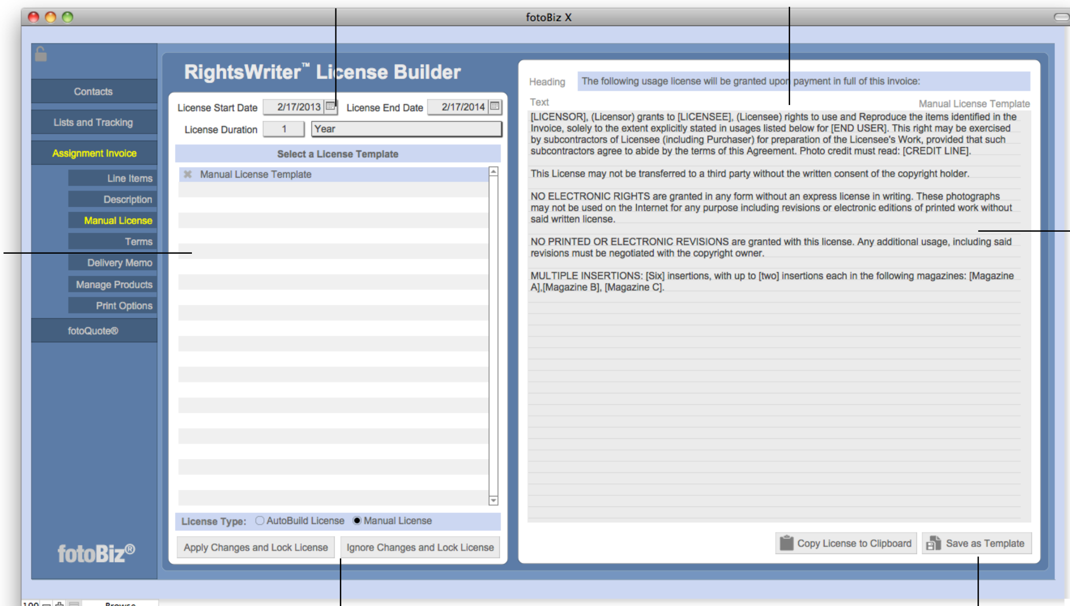
Save the new license as a template to select later as a Manual License

Merge Fields: The Licensee, End User, Licensor and Credit Line are all merge fields that you can insert into the Opening or Closing paragraphs. To insert one of these fields, place your cursor where you want the merge field to appear and click the button adjacent to that item. This will automatically add the contents of that field to your license.

An AutoBuild license takes the information you've already entered about the image usage and builds a license for you automatically. If you want to format your license differently or add additional information you would want to use the ManualBuild license instead. The AutoBuild License is also the only way you can include a thumbnail with a license.

Creating a License - Continued

Creating an Manual License: There are two ways to build your license using the RightsWriter, the AutoBuild or Manual License. This screen shows the Manual License feature. It is important to state clearly exactly what rights you are basing the quote on. Stating your terms of doing business clearly and consistently is your best defense against the client trying to dictate your terms for you.

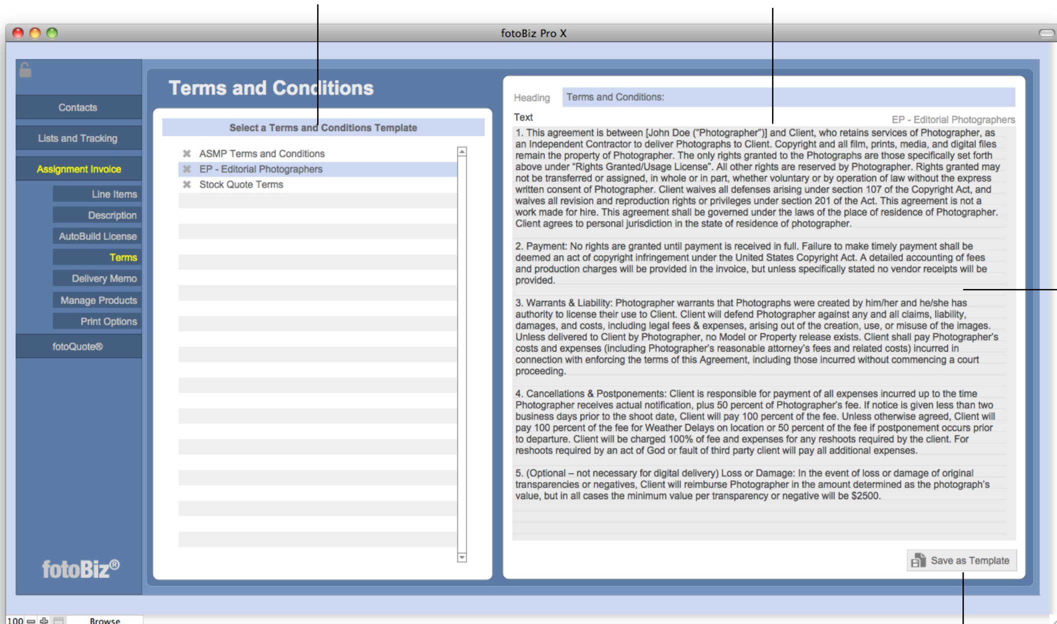


A Manual License is used when you want to customize the way the license information is presented or if you want to use a license template. It's not possible to track specific image licenses with a manual license if you want to do so you must use the AutoBuild license.

Exporting License Reminders: If don't have license reminders automatically set to export in Setup > License Reminder, then you can individually export a license reminder for only those license expiration dates you want to track. To do this select Invoice from the drop-down menu and click on Export License Reminder.

Terms and Conditions

Selecting Terms and Conditions: The default terms and conditions you identified as part of setting up your templates will automatically be displayed here. You can select a different set of terms from the list on the left or make edits in the window to the right.



The Terms and Conditions included in fotoBiz for some of the professional organizations were the most current at the time fotoBiz was upgraded. Be sure to check you're using the latest version recommended by these respective organizations.

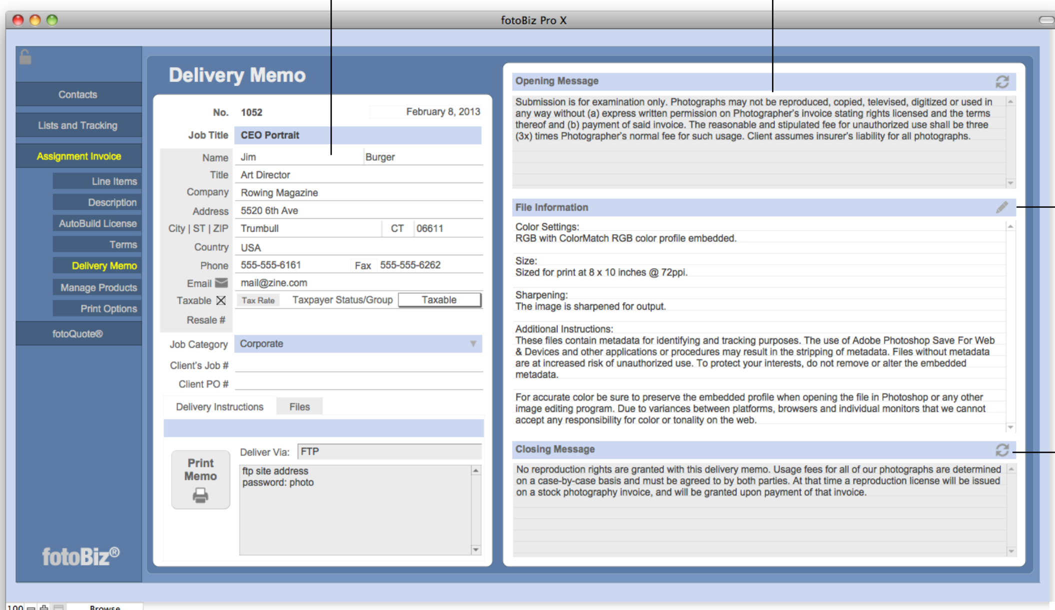
Hint: To add a new set of Terms and Conditions go to Setup > Templates > Terms, select the plus (+) sign from the top of the terms listing or choose New Template from the File drop-down menu.

Delivery Memo

Delivery Memo: Most delivery memos are now digital and are sent electronically along with your original invoice or sent separately to the end user, for example the design department. The invoice can go to the accounting department and the delivery memo can be delivered separately without all of the financial information that's included on an invoice.

Changes made here do not affect the main contact record

This information pulls from your default settings in Setup. Changes made here will not affect the default



Click here to open a dialog box to enter information about your images

Select the refresh button to revert back to your default setting

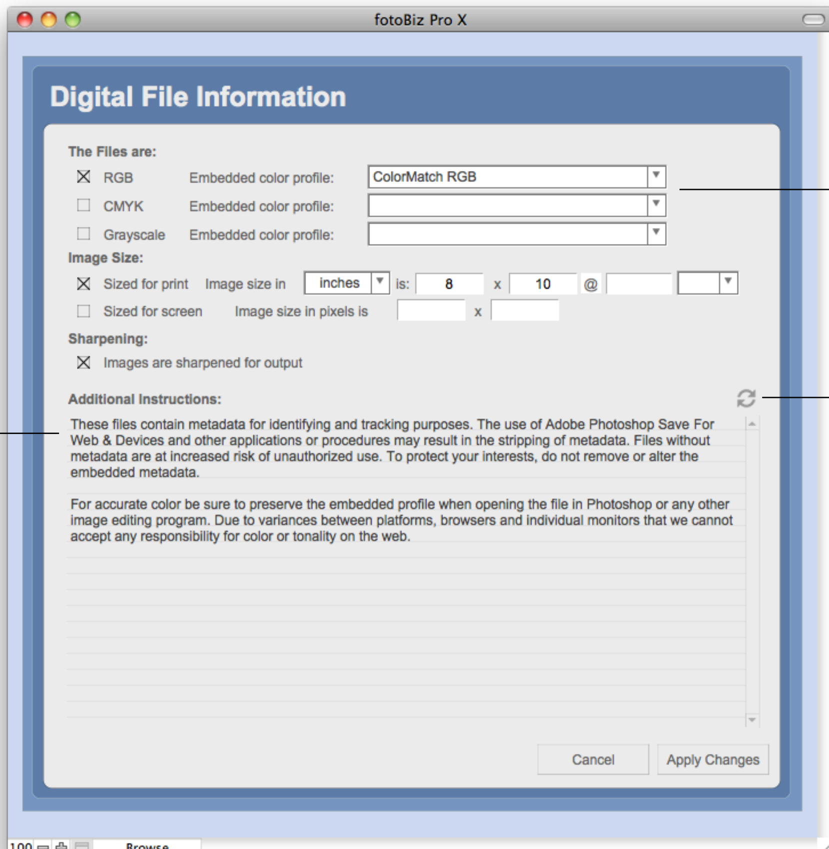
Assignment delivery memos are like packing slips that outline what is being delivered. The delivery memos you create from assignment invoices are different from the delivery memo submissions you create in that they are tied to a specific job and assignment invoice.

Hint: Your assignment delivery memo will have the same number as your Assignment Invoice as it is essentially an extension of the assignment invoice.

Delivery Memo - Continued

Delivery Memo Digital File Information: Selecting the pencil icon on the assignment delivery memo worksheet will bring up the following screen. From here you're able to provide details for the client about the digital files you are delivering.

Make changes here to the default text



Choose additional information from these drop-down menus to refine your digital file information

Select the refresh button to revert back to your default setting

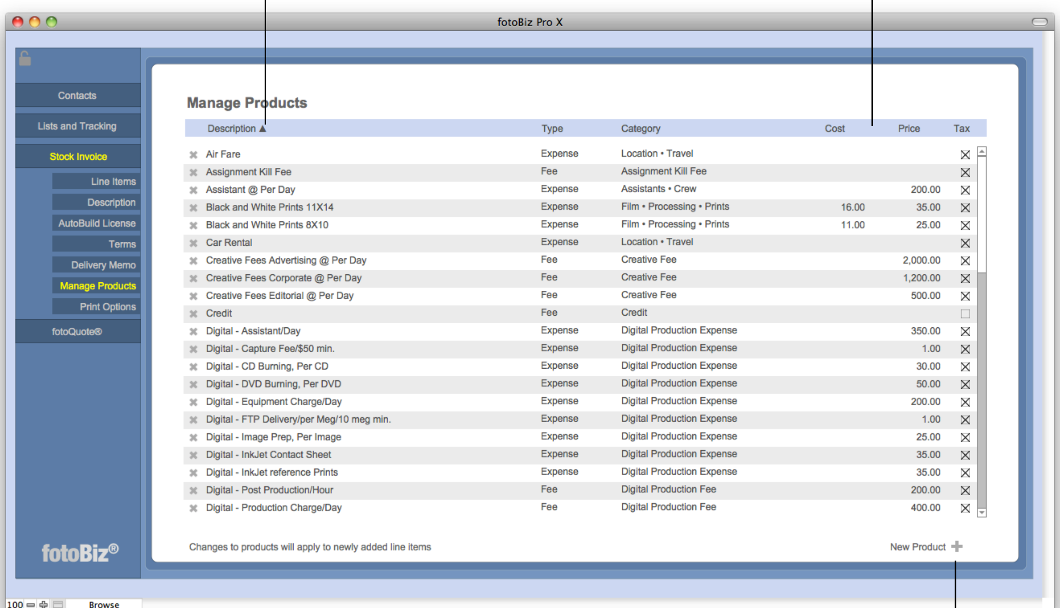
After you fill out the digital file information, select the Apply Changes button to return to the delivery memo. To fine tune your digital file information, click into the text box to make your edits.

Managing Products

Managing Products: You can manage your products from three separate places in fotoBiz. Select the Manage Products menu item from either Stock Quotes, Assignments or Invoices. When you select New Product from the lower right corner you'll be presented with a dialog box to complete your entry. Complete the description, type and category and indicate whether the item is taxable or not, then select OK.

Sort your product list by selecting the ascending or descending arrow

Enter the cost you incur for the item and the price you charge in these columns



Add a new product here

Entering your cost for each item will provide you with valuable profit and loss reporting information on your Stock Productions.

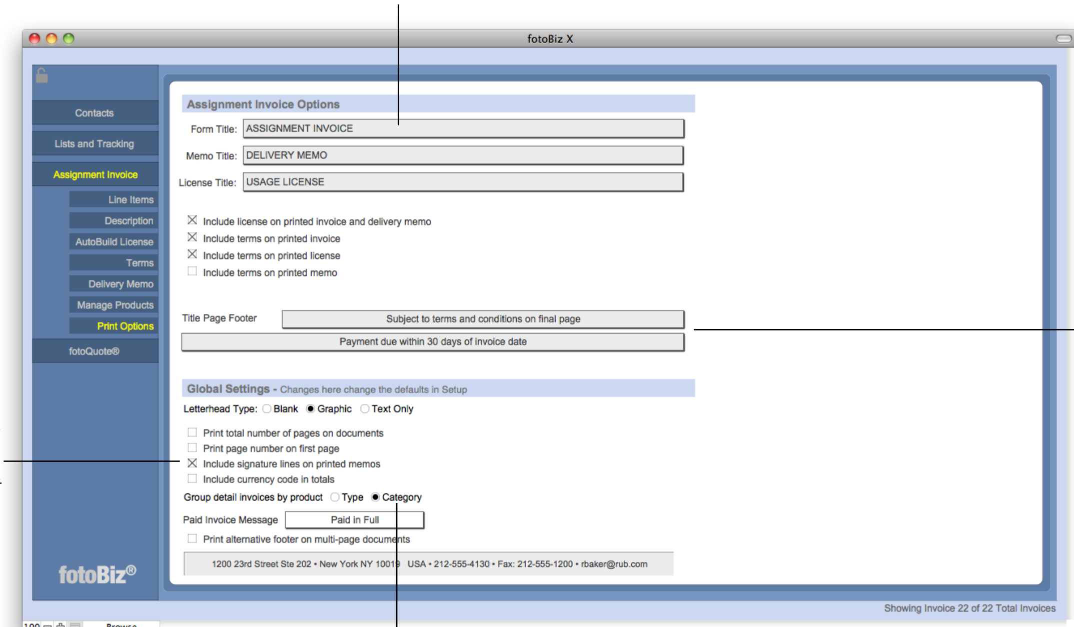
Hint: Changes you make to existing products will apply only to newly added line items.

Print Options

Assignment Invoice Printing Options: The printing options you select under Assignment Invoice Options are only for the invoice you are working on. This allows you to customize the information you want displayed on your invoice per job or per client. The changes you make here do not affect your assignment invoice default settings. If you want to make global changes to your assignment invoice print options that apply to all invoices, go to Setup from the main Contacts screen and then choose the Assignment Invoice tab under Settings and Defaults.

Click into the title field to view a list of options. Select Edit to make changes or additions

Define what information you want printed on the Assignment Invoice



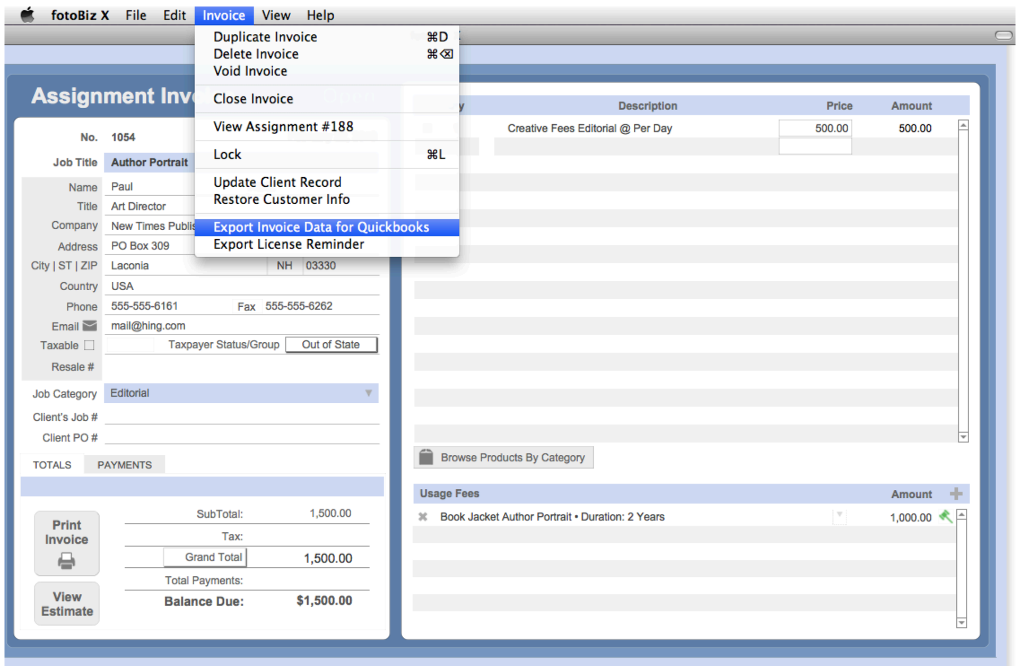
You have two lines for a footer message. Make your selections here or leave blank

Choose how you want the line items grouped on your detail assignment invoice

Global Settings Print Options: The Global Settings apply to all assignment invoices. The changes you make here will apply to all assignment invoices.

Exporting Invoice Data for QuickBooks

Exporting Individual Assignment Invoice Data for QuickBooks: You're able to export any individual assignment invoice data for import into QuickBooks. To do this you must be on the invoice record you wish to export. Select Invoice from the drop-down menu and then click on Export Invoice Data for Quickbooks.



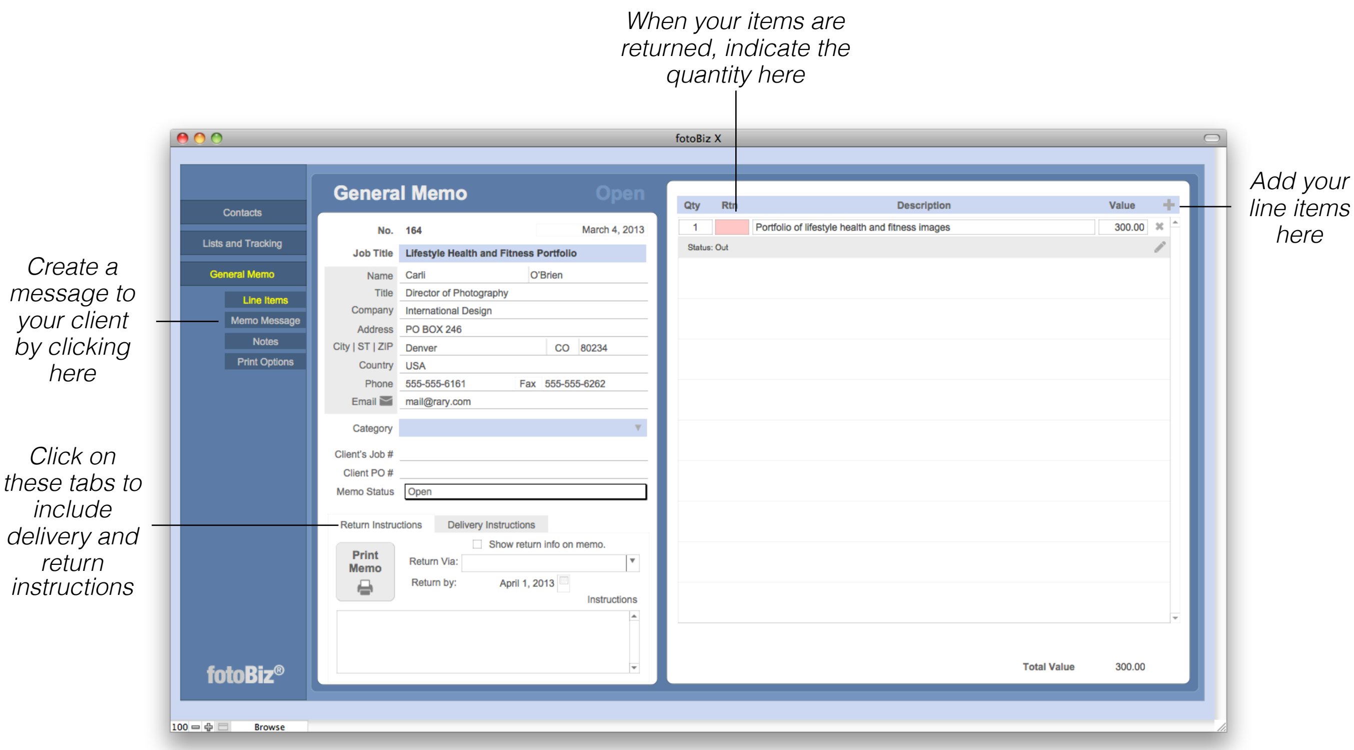
The first time you export data for QuickBooks, you'll be asked to set your QuickBooks account fields. The QuickBooks account field names must match the account names you've set up in QuickBooks. Once that is complete a file in .iif format for QuickBooks will be placed on your desktop. Use this file to import your data for this individual invoice into QuickBooks. Refer to your QuickBooks help manual for instructions on importing .iif files. We strongly recommend you test this on a backup copy of your QuickBooks Company first.

When you export data to QuickBooks, fotoBiz assumes the invoice has been paid. If you export an invoice that has not been marked as paid after the export you will be asked if you want to pay the invoice in full and close it out.

Hint: You can also export a grouping of invoice data for QuickBooks as one of the report action options in Lists and Tracking > Invoices. See *page 87* *for details.*

Delivery Memos and Submissions

Submissions: Submissions are delivery memos that are created for a specific contact. There are two types you can create with fotoBiz, General and Delivery. A Delivery Memo would be created for image submissions and a General Memo can be used to track items out for repair as well as portfolio submissions.

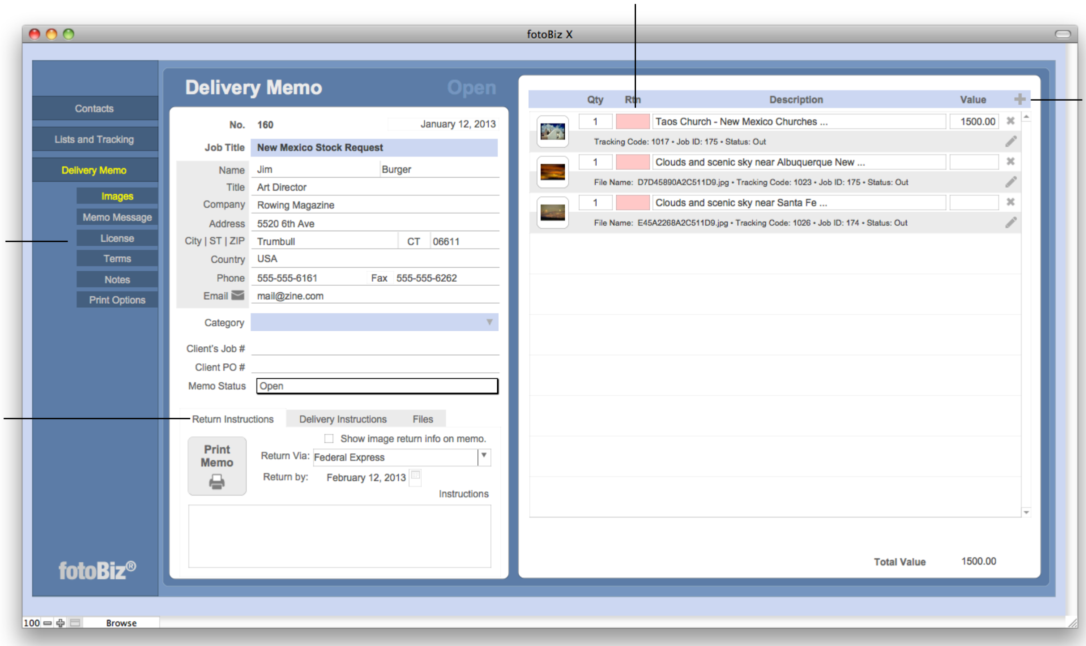


General Memo: To create a General Memo, find the contact record for whom the memo will be assigned. From the Create New Document list, select Submission and make your choice of General.

Hint: The information you include in the Notes section is for your reference only and will not be printed on the General Memo.

Submissions - Continued

Delivery Memo: To create a Delivery Memo, find the contact record for whom the memo will be assigned. From the Create New Document list, select Submission and make your choice of Delivery. Because delivery memos deal with images, you have the option to include licensing information as well as terms and conditions.



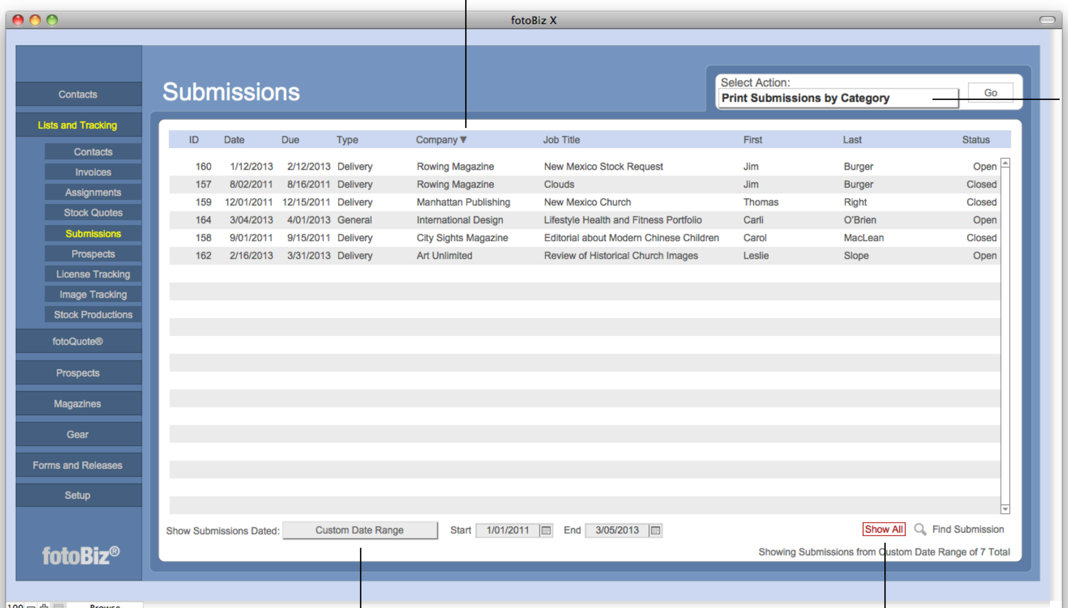
Use delivery memo submissions when the images are not tied to an invoice or stock quote.

Hint: The information you include in the Notes section is for your reference only and will not be printed on the Delivery Memo.

Submissions - Continued

Tracking Submissions: To view your submissions, click Lists and Tracking from the menu on the left and select Submissions. To find a group of submissions click the Find Submission button from the lower right corner of the Lists and Tracking screen (you can also find submissions from the individual contact record). After the Find window opens, type your search query into the appropriate fields and click Search.

Click next to each column header to sort the list ascending or descending



Select an action to print submissions by Category, Company or Type

Filter your submissions by various date ranges

Select Show All to reset the found set

Submission Browsing: When you select a submission from the displayed list you can quickly browse through those submissions by selecting View from the menu bar or by using the Command and arrow keys to indicate the first, last, next or previous submission.

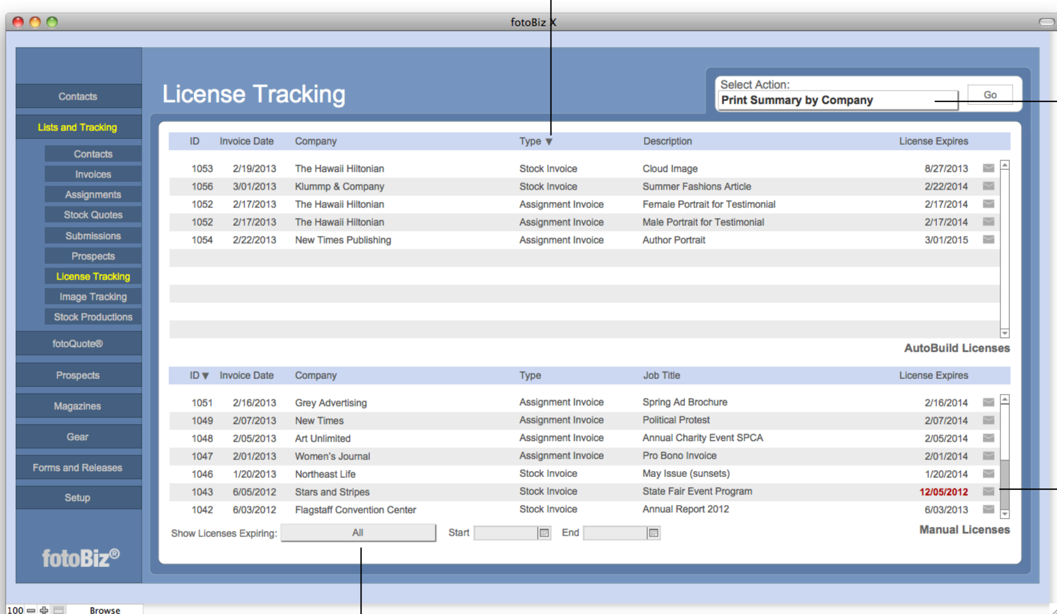
Hint: You can also conduct a find of your submissions by selecting Submissions from the file menu.

License Tracking

License Tracking: Anytime you create a license that has an end date, fotoBiz will keep a record of it for you. With License Tracking you'll be able to easily see at a glance what licenses are coming due for renewal. In the Setup > License Reminder tab you can also choose to set up an iCal reminder so that you're notified when a license is coming due.

Click next to each column header to sort the list ascending or descending

Select an action to print licenses by Company or by Month



Licenses that have expired will display in red

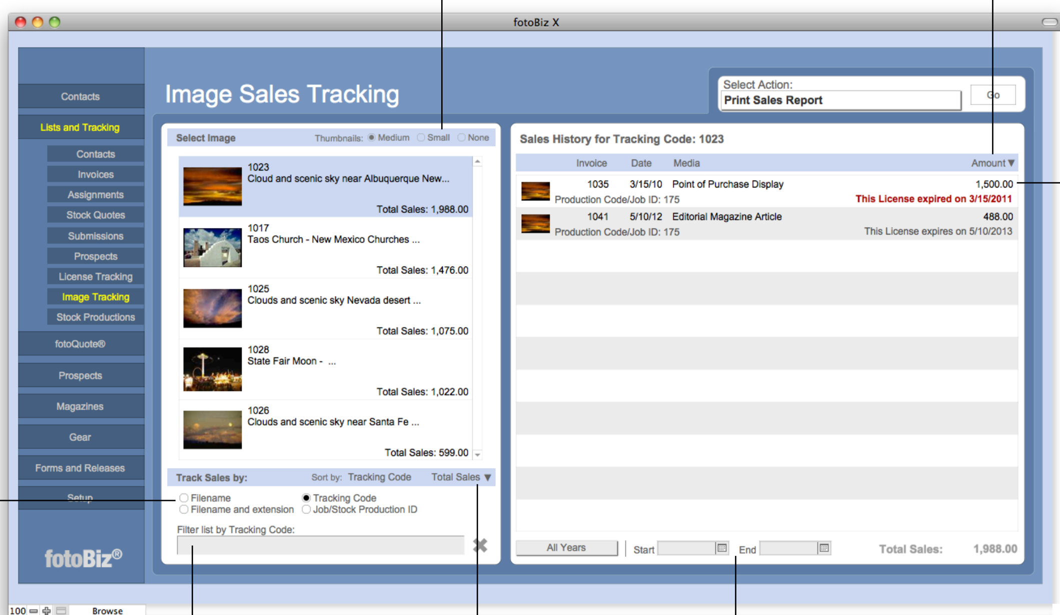
Filter your licenses by various date ranges

Select the envelope icon to the right of each license to send an email reminder to your client that the image(s) is up for renewal. License expiration dates in red have expired and those that are bold are set to expire in 30 days. Your AutoBuild licenses are in the top section and the Manual licenses at the bottom.

Hint: If you don't want to track a license expiration date, uncheck the "Track the license for this invoice" box on the original license screen. To do this go to the original stock or assignment invoice and select the license from the menu at the left. The check box will be in the lower right corner of the RightsWriter.

Image Sales Tracking

Image Sales Tracking: When you license images on stock invoices, fotoBiz can track the sales for that image. This gives you meaningful data that tells you what types of images are making you money. You can also assign the image to a stock production and fotoBiz will track the sales of all images from that shoot. When an image is licensed on a stock invoice you have the option to include a thumbnail. In order for fotoBiz to track an image, specific data must be either entered manually or imported from the metadata of your image. These fields are the image tracking code, file name or job/stock production ID.



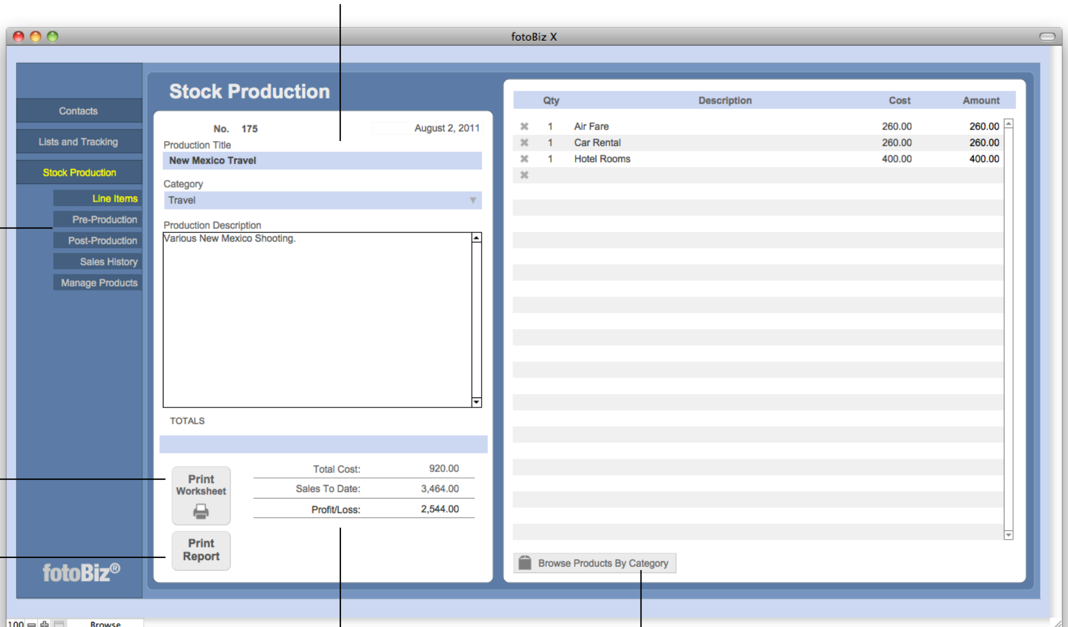
Click on the image thumbnail for a specific invoice to take you directly to that invoice. From there you can come back to Image Tracking by selecting that option from the menu at the left of the invoice screen.

Hint: The sales report you run will display only those images that show on the right side of the screen. Select your sort parameters first then run your sales report.

Stock Productions

Stock Productions: A stock production is like an assignment estimate, except it is for you rather than your client. The fotoBiz stock production, along with the automatic sales tracking ability in fotoBiz, makes keeping track of the costs and profits of your stock shoots a breeze. To create a Stock Production, from the main Contacts screen select Create New Document > Stock Production.

Enter the details of your stock production here



Add your production notes and view the sales history here

Print the worksheet to take with you on your shoot

Click here to print a report for this stock production

At a glance you'll be able to see your profit or loss for each stock production

Choose line items from your products catalog

When you enter a product into your product catalog, you have the option to enter the cost for that item or service. This cost to you is what will display when you select that item from your products listing. The difference between a stock production worksheet and an invoice or assignment estimate is that the stock production enters your actual cost of the items and the other documents use your sales price for the entries.

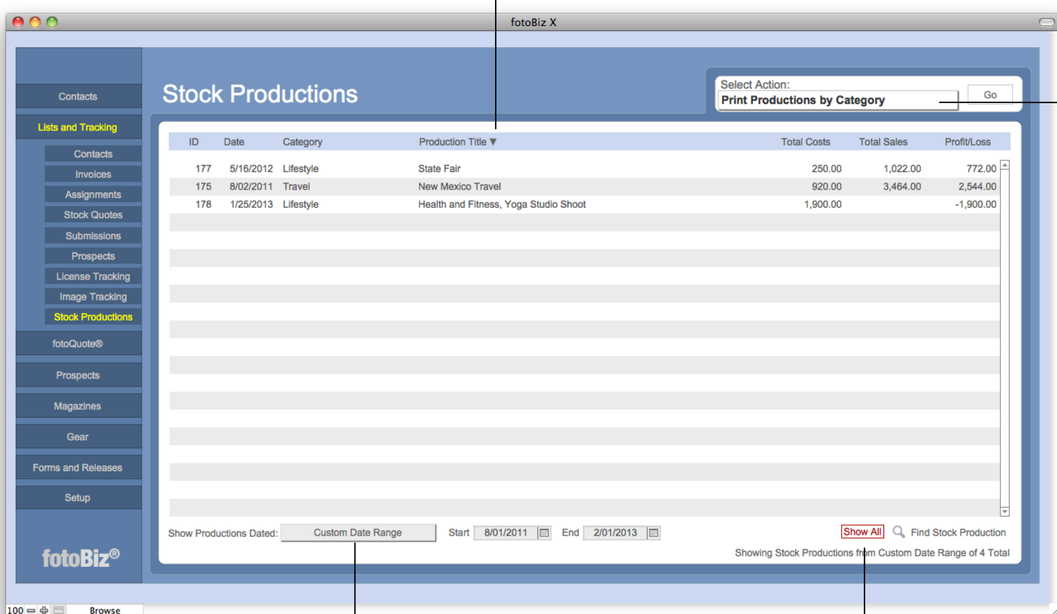
Hint: When you add an image to a stock invoice, you'll be able to enter a stock production number in the Image Information section of that image entry. This is how you connect image sales to stock productions.

Stock Productions - Continued

Tracking Stock Productions: Working with your Stock Productions is similar to how you work with your other lists. Each column has a descending and ascending sort oder. To conduct a search for a specific set of stock productions, select Find Stock Production from the lower right corner or select Find Production from the Production drop-down menu.

Click next to each column header to sort the list ascending or descending

Select an action to print productions by Category or by current list sort



Filter your quotes by various date ranges

Select Show All to reset the found set

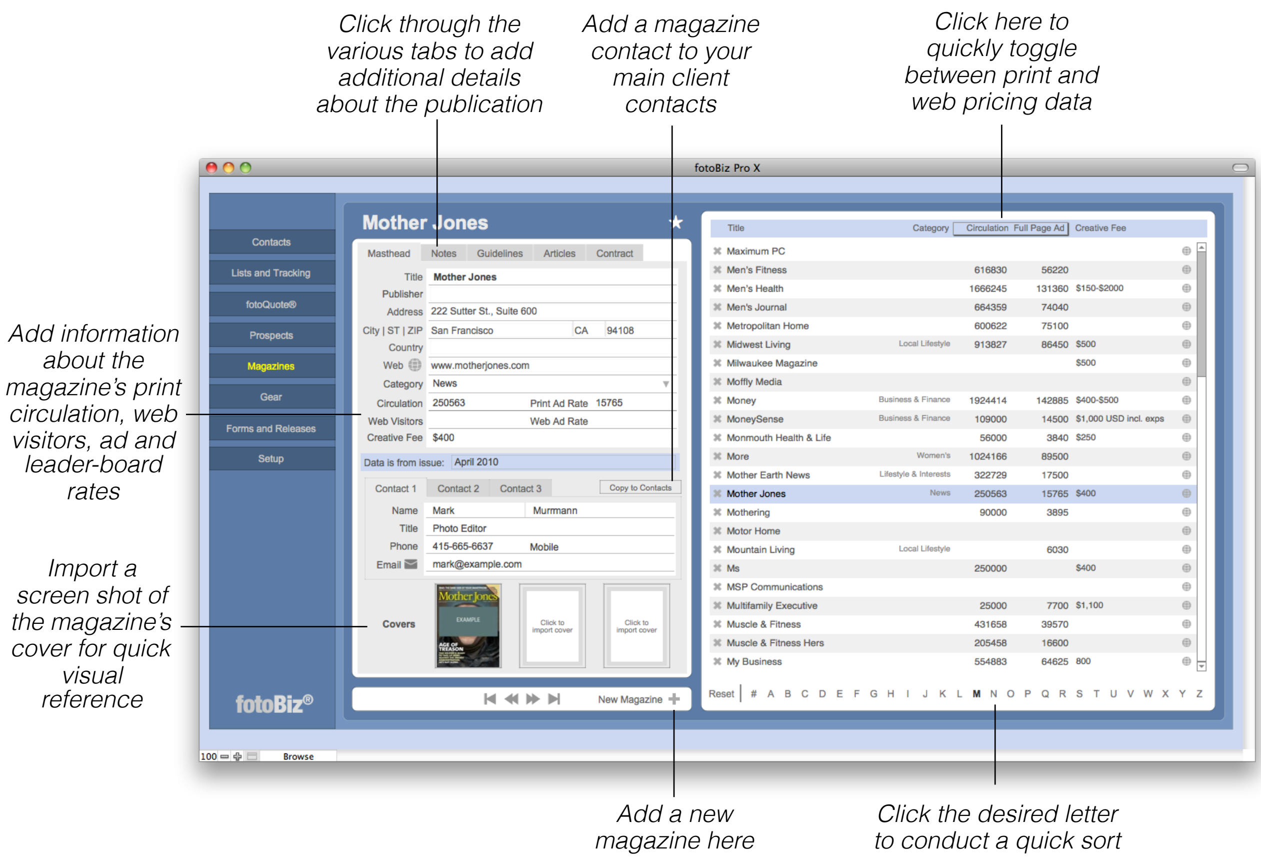
Stock Production Reporting: You're able to print reports of your stock productions by category such as travel, scenic, lifestyle, etc. You can also print stock productions of a found set. For example, if you wanted to print all the stock productions for a given year you would conduct a find of those productions and then select Print Production List by Current Sort from the Select Action drop-down menu.

Stock Production Browsing: When you select a stock production from the displayed list you can quickly browse through those productions by selecting View from the menu bar or by using the Command and arrow keys to indicate the first, last, next or previous stock production.

Hint: You can delete or duplicate any existing stock production by selecting the appropriate action from the Production drop-down menu.

Magazine Listing

Magazine Database: Use the information in the Magazine Database to help in your negotiations with specific magazines. Knowing what the magazine charges for its ads gives you a good idea of their real budget.

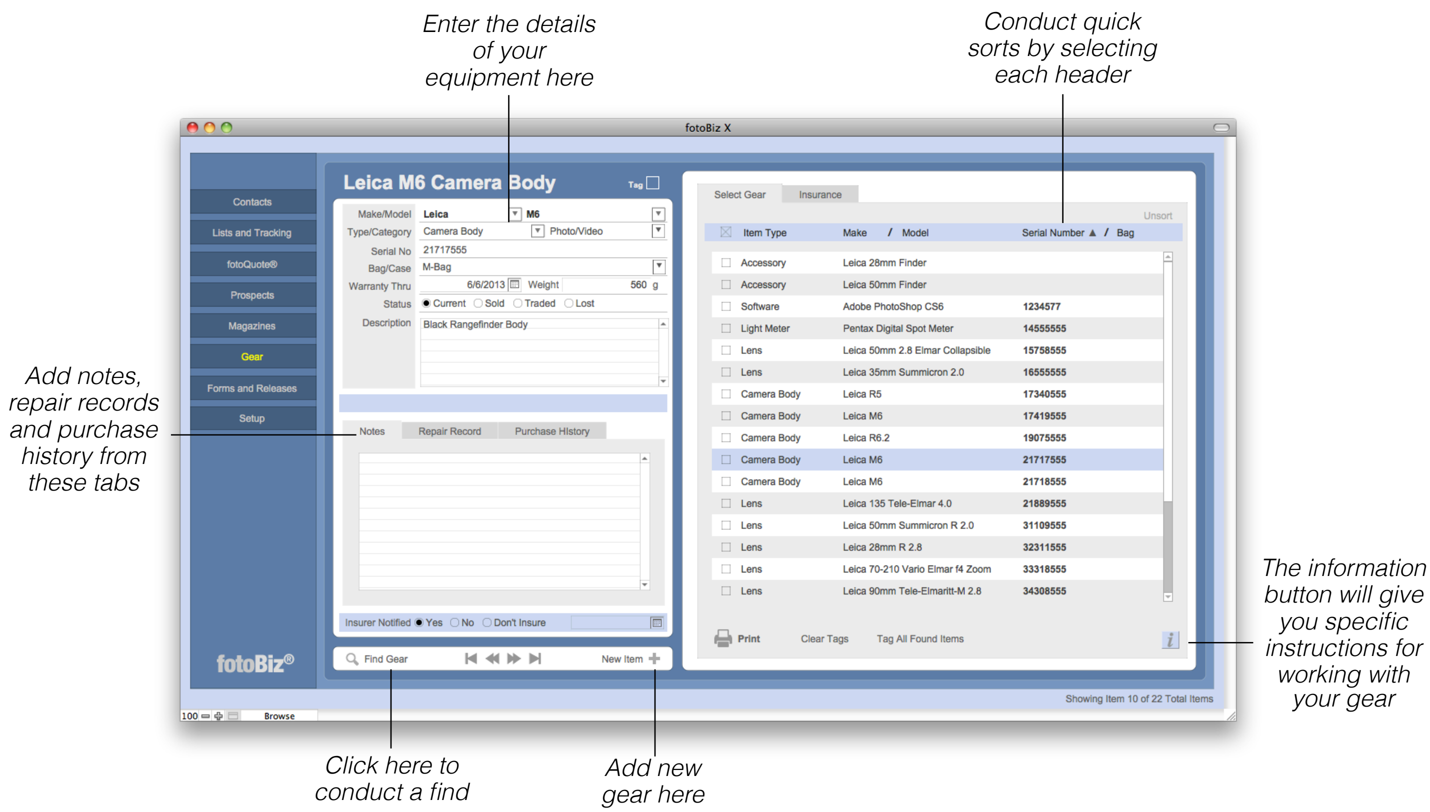


Disclaimer: Due to the constant flux of magazine rates combined with their longevity, this data is intended as a guide only. The Creative Fee column data has been collected from dialogs between EP photographers, probably not from the magazines themselves, and have not been verified. No one takes responsibility for the information - neither us nor Editorial Photographers.

Hint: It's a good idea when you're adding your own information to put in a date in the provided "Data is from issue" field so you can quickly know how current the info is over a period of time.

Gear

Working with Your Gear: Enter your equipment in this module and fotoBiz will keep record of your equipment serial numbers, warranties, repair records and much more. Assign your gear to a camera bag and fotoBiz tells you how much each bag is worth and how much it weighs. You can also print packing lists to take to the job with you. Select the information icon in the lower right corner for specific instructions.

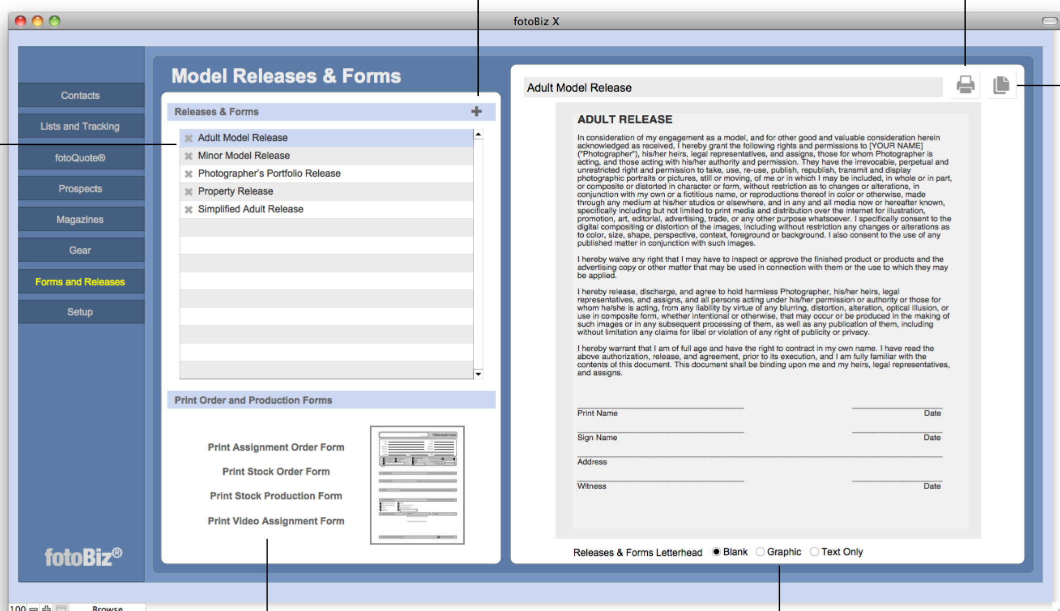


Insurance Tab: From the Insurance tab you can print insurance schedules for submissions to your insurance provider or agent. The insurance report you run will display only the equipment from the found set you've selected from the Select Gear tab. The insurance report is automatically sorted by category to conform to the requirements set forth by companies that work with professional photography organizations, such as ASMP Prosurance.

Hint: You can import or export gear by selecting this option from the File drop-down menu. You can also duplicate or delete a piece of equipment from the Gear drop-down menu.

Forms and Releases

Creating and Editing Forms and Releases: FotoBiz comes with a few standard release forms. You can edit these to meet your specific needs or create new ones. Also included in the program are various production forms. These forms are designed to help you gather the right information when talking to a client about a new stock order, assignment job or video shoot. These are printouts only and can be used to jot down your notes when speaking with a client.

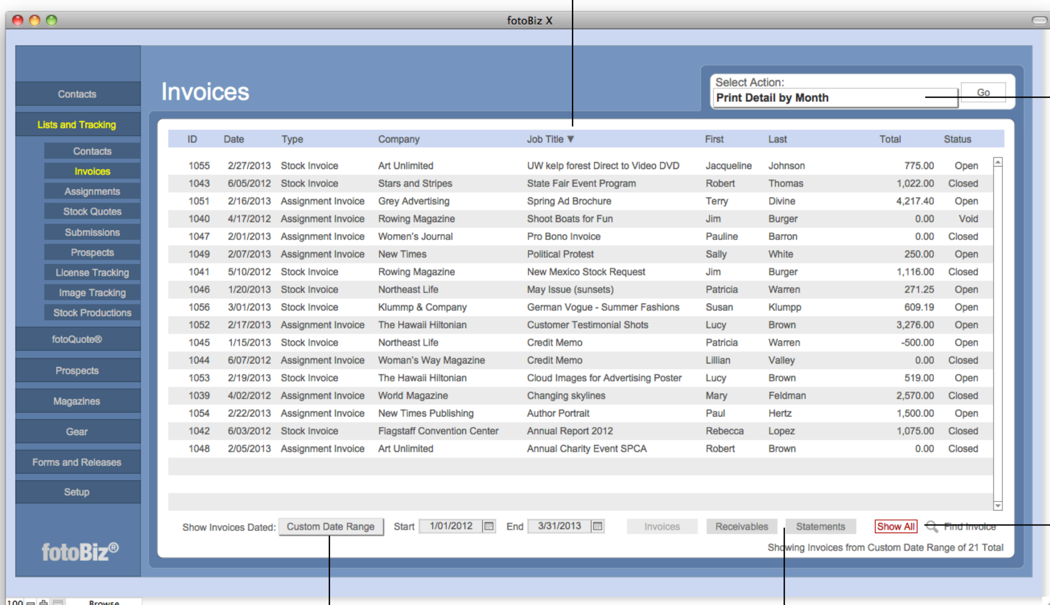


Invoice Tracking and Reports

Invoice Tracking: To access your list of invoices select Invoices from the Lists and Tracking menu option. Each column has a descending and ascending sort order. To conduct a search for a specific set of invoices select Find Invoice from the lower right corner or select Find Invoice from the Invoices drop-down menu.

Click next to each column header to sort the list ascending or descending

Select an action to print various types of reports



Select Show All to reset the found set

Filter your invoices by various date ranges

View your receivables or print statements from here

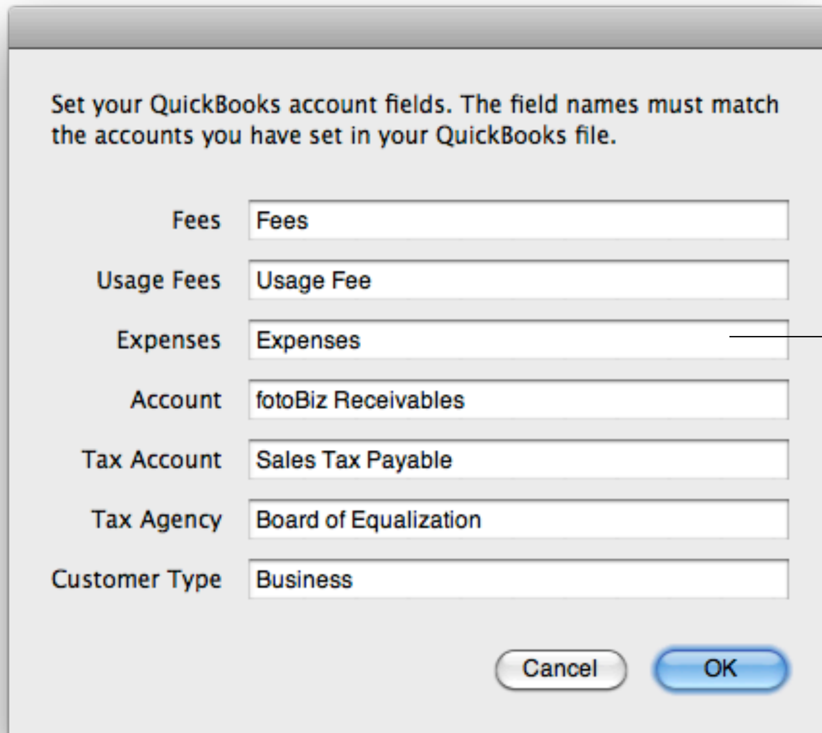
Invoice Reporting: You're able to print several different types of sales reports. These include sales summary by category or company, detail and summary options by month, line item details and summaries as well as sales tax reports. The action you select from the upper right corner will print the current found set displayed on the screen. You'll then have the option to print all invoices in that found set or only those that are open or closed.

Invoice Browsing: When you select an invoice from the displayed list you can quickly browse through those invoices by selecting View from the menu bar or by using the Command and arrow keys to indicate the first, last, next or previous invoice.

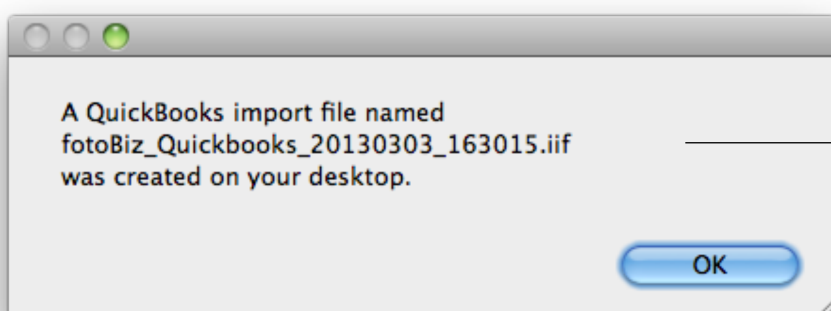
Hint: You can also export your invoice data for QuickBooks as one of the report action options.

Invoice Tracking and Reports - Continued

Exporting Invoice Data to QuickBooks: Exporting to QuickBooks is one of the report actions you can select from the Invoices Lists and Tracking screen. The first time you export data for QuickBooks, you'll be asked to set your QuickBooks account fields. The QuickBooks account field names must match the account names you have set up in QuickBooks. Once that is complete a file in .iif format for QuickBooks will be placed on your desktop. Use this file to import your data for this group of invoices into QuickBooks. Refer to your QuickBooks help manual for instructions on importing .iif files. We strongly recommend you test this on a backup copy of your QuickBooks company file first.



These fields must be the same as your QuickBooks accounts



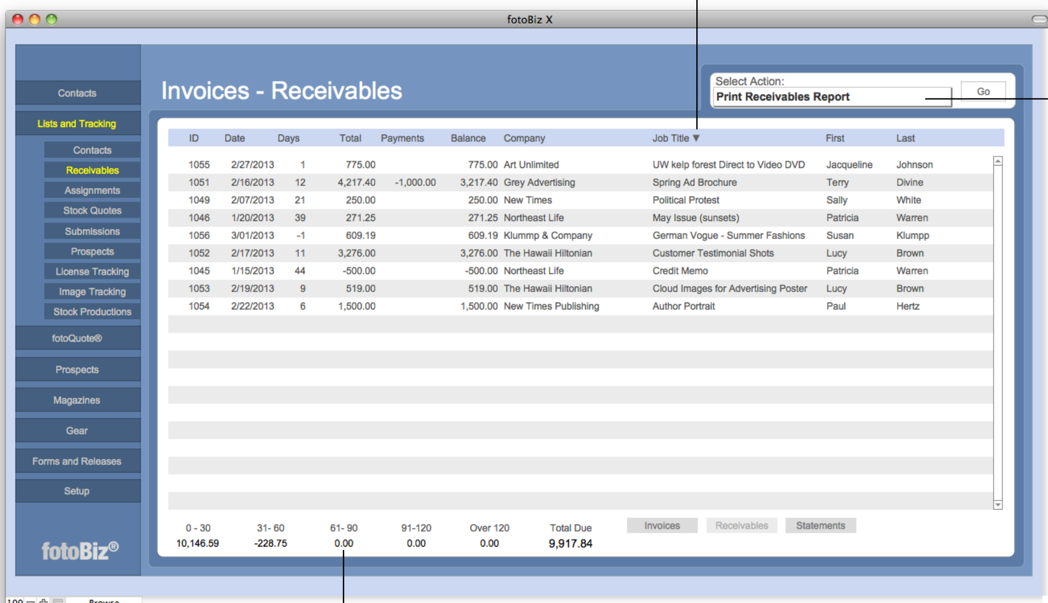
After you select OK from the above screen the file will be saved to your desktop

Invoice Tracking and Reports - Continued

Receivables: To view your receivables select the Receivables button from the Lists and Tracking > Invoices screen. This will show a list of all open invoices with the invoice date, invoice total, payments made and the balance due. Click on one of the invoices in receivables to go directly to that invoice.

Click next to each column header to sort the list ascending or descending

Select an action to print a receivables or aging report



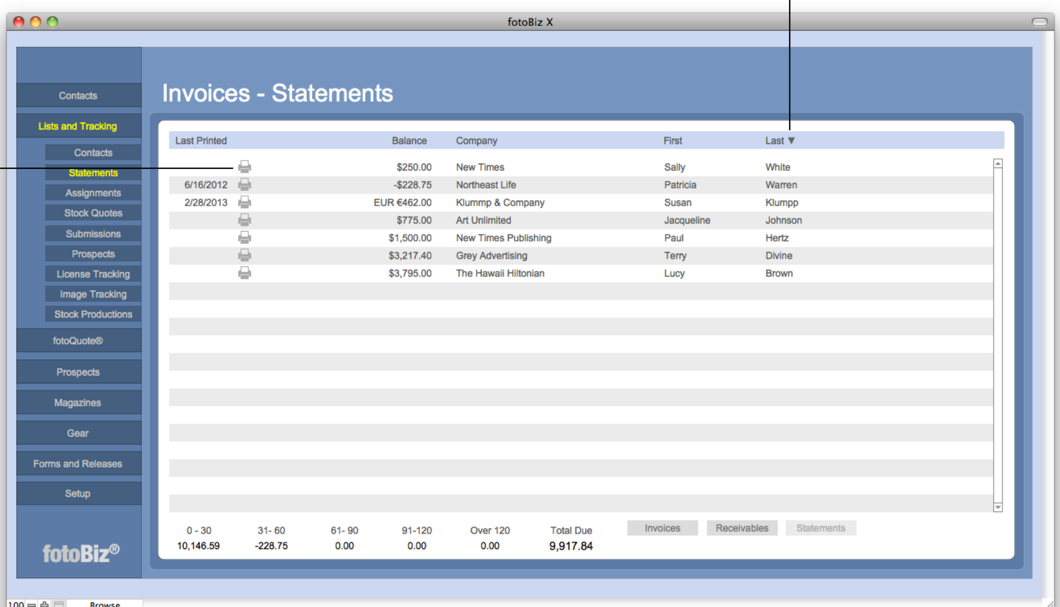
Your receivables aging is displayed here

Invoice Tracking and Reports - Continued

Statements: To view and print your statements select the Statements button from the Lists and Tracking > Invoices screen. This displays every customer who owes you money along with the total amount they owe you. When you print a statement for a client, the last date printed will automatically be updated.

Click next to each column header to sort the list ascending or descending

Select the printer icon to print a statement



Clients that you bill in a currency other than your home currency will be sent a statement reflecting their currency.

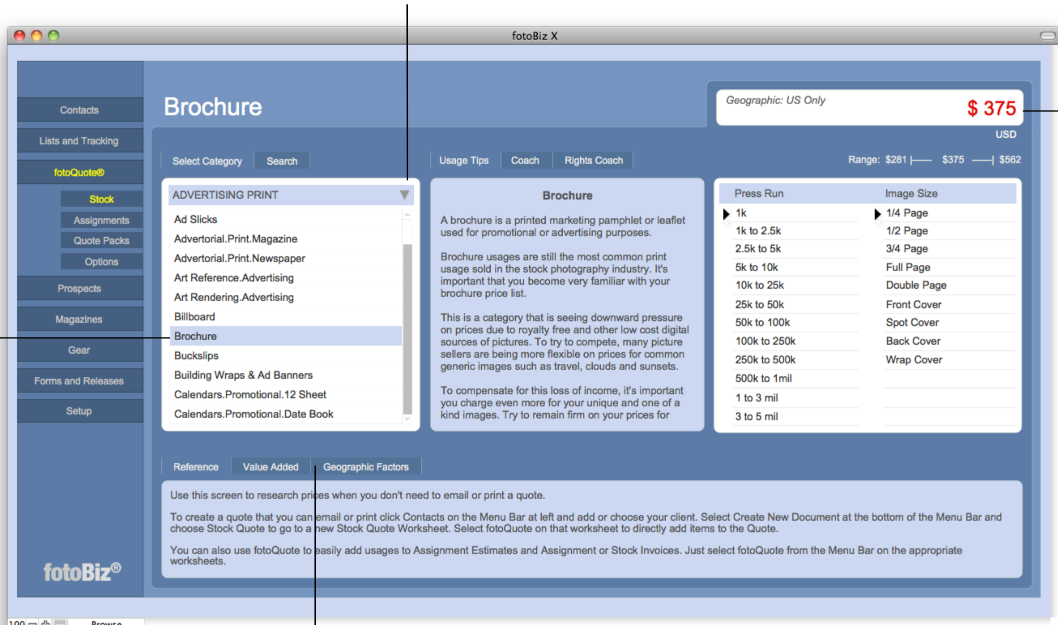
fotoQuote

How to use fotoQuote for Usage Pricing: There are two ways to access the fotoQuote pricing and negotiating information built into fotoBiz. The first is from the menu listing displayed on the left. Accessing fotoQuote from here is for reference only. Here you're able to conduct pricing research without needing to generate an invoice, stock quote or assignment estimate first. For detailed information on how to use fotoQuote to add line items to your Stock Quotes, Assignment Estimates or Invoice, see those individual sections within this manual.

Click the down arrow to select a category

The middle range price is displayed here

Once a category is chosen, select the individual usage from this panel

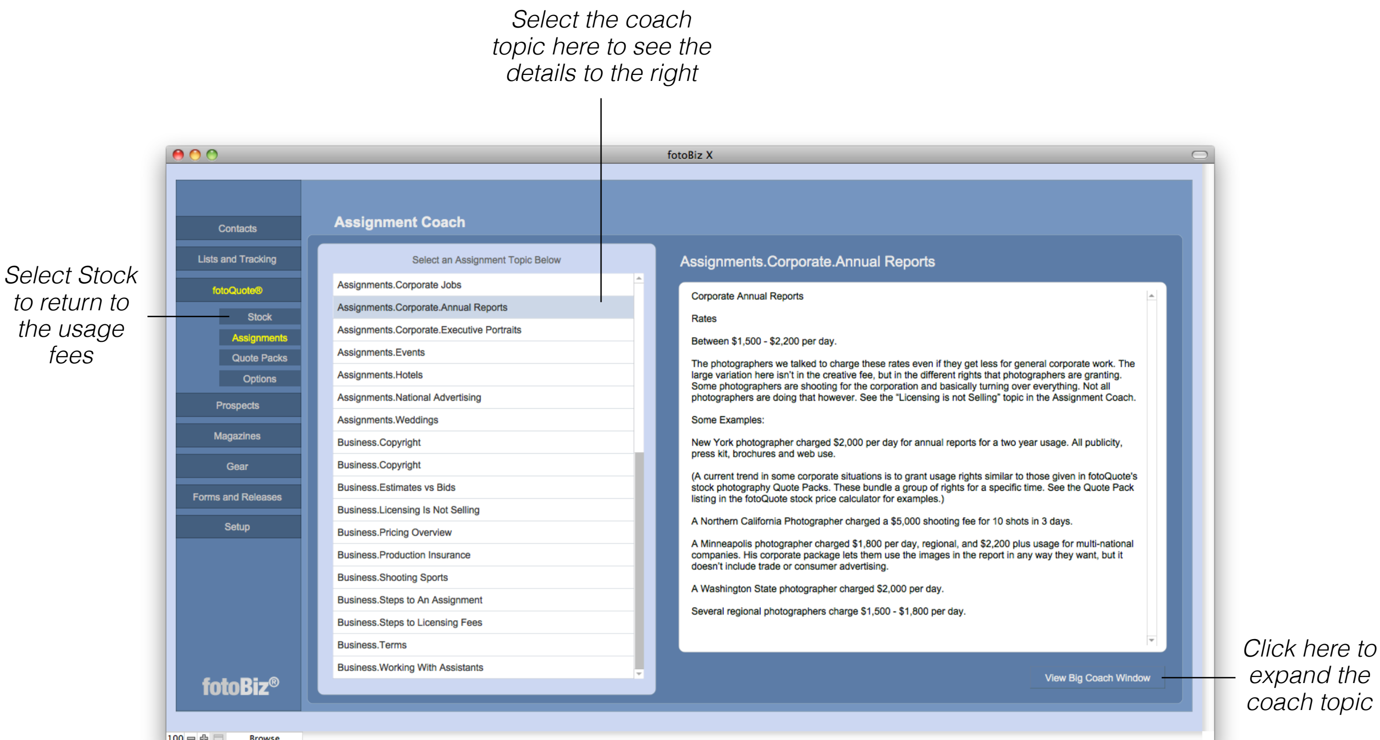


You can adjust the pricing based on value added or geographic factors

Usage Tips and Coach Tabs: In the center of the stock pricing screen are three tabs: Usage Tips, Coach and Rights Coach. The Usage Tips will provide you with additional information about the use you've selected along with additional negotiating tips. The Coach tips include valuable information on pricing and negotiation for a variety of topics like revisions, discounts and multi-website use. The Rights Coach deals with specific rights requests such as exclusivity, buyouts and textbook use.

fotoQuote - Continued

Using fotoQuote for Assignment Fee Research: The Assignment Coach is rich with information about business practices, assignment pricing, creative fees, pricing strategies, and negotiation tips from nationally successful photographers. Here you'll find help and tips for pricing many types of assignments.



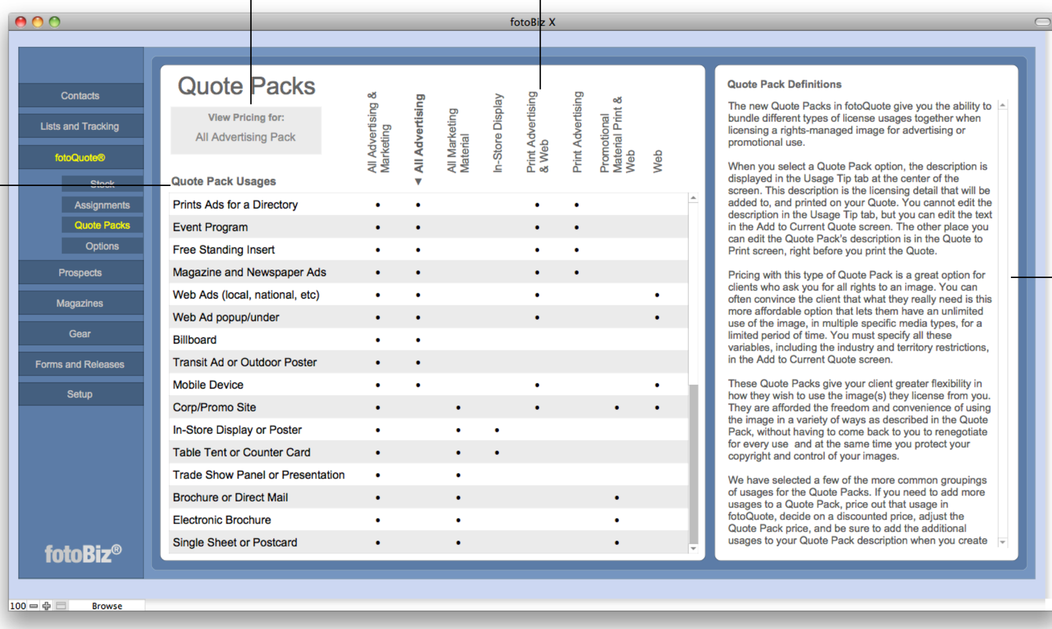
Information and prices in the Assignment Coach are based on interviews with assignment photographers throughout the US. The way many assignment photographers use fotoQuote is to reference the coach material for assignment fees and then use the stock side to determine their usage. Apply the information here to help you determine what to charge for your time as well as other things like digital fees.

Quote Packs: You can access the Quote Pack pricing from two places in fotoQuote, from the menu options in the fotoQuote section of the program, or from the Stock pricing section as one of the category selections. The chart below helps you see exactly what usages are included in each Quote Pack.

To view pricing and add to quote click here

Click on one of the column headings to sort the data by quote pack type

Click to sort by usage type



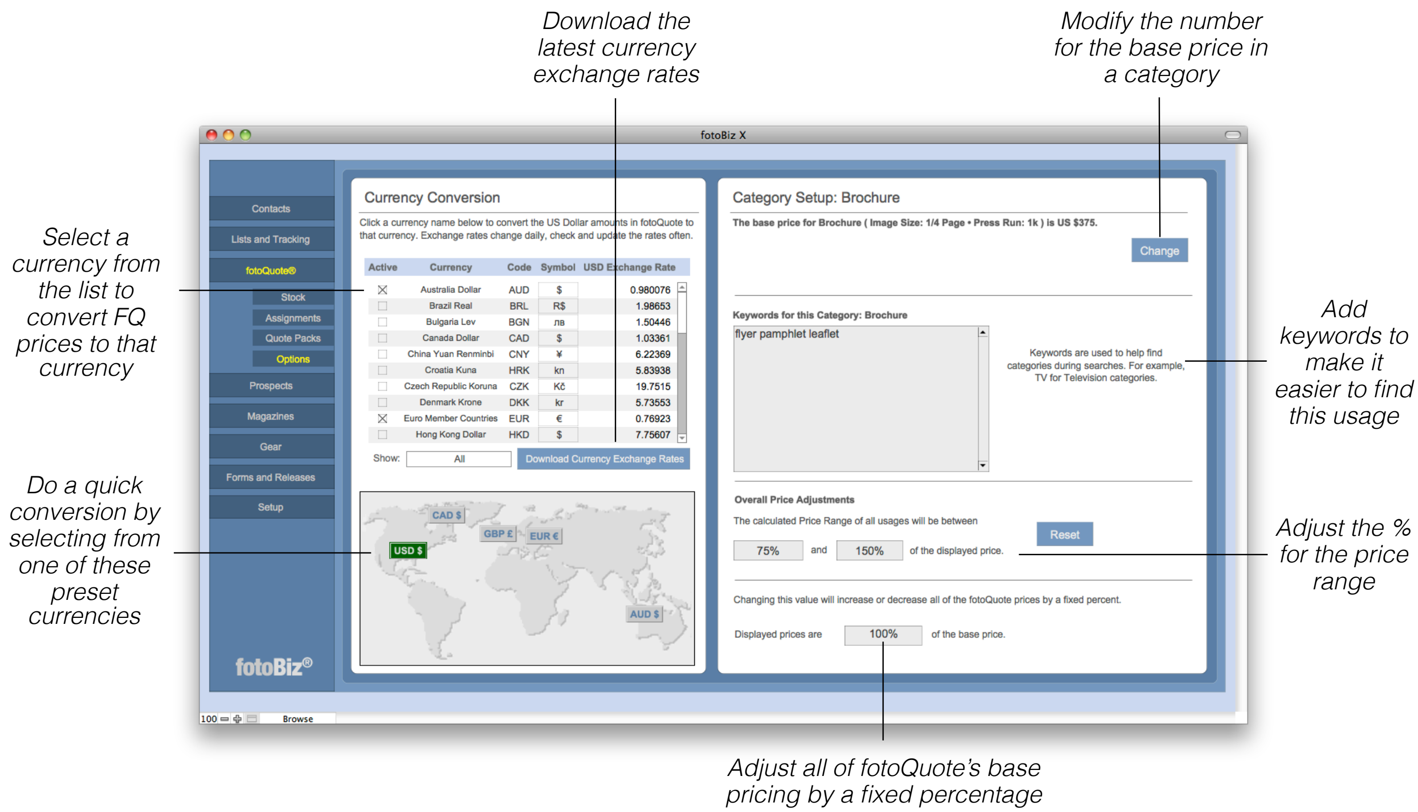
General overview and definitions for each Quote Pack

Quote Packs give you the ability to bundle different types of license usages together when licensing a rights-managed image for advertising or promotional use. Pricing with this type of Quote Pack is a great option for clients who ask you for all rights to an image. You can often convince the client that what they really need is this more affordable option that lets them have an unlimited use of the image, in multiple specific media types, for a limited period of time.

These Quote Packs give your client greater flexibility in how they wish to use the image(s) they license from you. They're afforded the freedom and convenience of using the image in a variety of ways as described in the Quote Pack, without having to come back to you to renegotiate for every use. At the same time you protect your copyright and maintain control of your images.

fotoQuote - Continued

fotoQuote Options: From here you'll determine your global settings for fotoQuote. You can also adjust the pricing on an individual usage. FotoQuote displays an average price for each usage, and a price range is also calculated for the usage. Normally the price range is from 75% to 150% of the average price. You can change the percentages that will be used in this range. These percentages are used for ALL categories, not just the current category.



Displayed prices are 100% of the suggested fotoQuote prices. You can raise or lower ALL of the prices in fotoQuote by changing this number. Enter 1.1 (for 110%) to display all prices 10% higher than the fotoQuote suggested prices. Enter .9 (for 90%) to view all prices 10% lower than suggested. This does not change the actual prices in fotoQuote, it just adjusts the display of the suggested price. If you want to permanently change the base price in a selected category, enter the new price by selecting the Change button. Before you do this make a note of the original fotoQuote price just in case you want to change it back later. There's no undo button.

Hint: Select the Show field to display only your list of active currencies.