



## INTRODUCTION

Thank you for your purchase! Before you get started, it is recommended to configure your business' settings before you enter any Client details. Touch the Menu button and update your Settings to reflect your business' information.

Note, if your device is in the vertical position you can access additional options (already visible when the device is in the horizontal position) such as Taxes and Import/Export by touching the Settings button once more.

## CALENDAR

Calendar events are based on Tasks that are entered. Therefore, Calendar items are not added directly to the Calendar, rather, they appear based on other information that you've entered. Also note that your iPad's Calendar items have no bearing on Dovetail's Calendar and vice versa.

## NOTES

Notes can be individually allocated to a Client or Project. Click on Tips to find out about special codes to help streamline your workflow. Use these special codes to preface each item before you write it. Use the Modify button (in the left column) under each Note to allocate the Note to a particular Client or Project.

Use the Analyze button (at the bottom of the screen) to process your notes once you're finished. The Analyze button will automatically generate Invoices, Estimates or Tasks. During analysis you will have the opportunity to allocate any items, which haven't already been prefaced by a code, to a Task, Invoice or Estimate.

## PROJECTS

Projects have the option of being tied to a Client or none at all. Projects are filed based on the Project, not the Client. It is recommended to file Projects with the Client name followed by the Project itself. For example, a logo for Jon's Shoe Repair would be best entered as "Jon's Shoe Repair Logo."

## TASKS

Tasks can be designated to a Client or Project or none at all (when neither is needed). Additionally, you have the option to specify a due date by which the task should be completed.

## CLIENTS

Clients are filed by the Company Name, when given, and secondly by the Name, if no Client Name is provided. Unlike Dovetail's Calendar section, use your iPad's contact list to quickly add Client details from your address book.

## INVOICES

Before you enter any information in this section make sure that you fill in the appropriate information under Taxes. Note: if your device is in the vertical position you can access additional options (already visible when the device is in the horizontal position) such as Taxes and Import/Export by touching the Settings button once more.

## ESTIMATES

Before you enter any information in this section make sure that you fill in the appropriate information under Taxes. Note: if your device is in the vertical position you can access additional options (already visible when the device is in the horizontal position) such as Taxes and Import/Export by touching the Settings button once more.

## SYNC

To sync Dovetail with another device (such as an iPad), launch the Sync manager on each device. Both devices should be running Dovetail's Sync manager to perform this function.