Colibri Studio™

Complete Feature List

General

- Single, integrated solution that replaces separate calendar, contact management, job and inventory management, and rental software applications.
- Cross-platform: Mac OS X 10.4.9 or higher (including Intel Macs); Windows XP/Vista.
- Multi-user, client/server architecture.
- Colibri Studio is completely customizable.
- Integrated system backup scheme.
- Integrated wiki-style help module.
- Extensive context-sensitive tooltips.
- System modules: calendar, contact management, project and job management, tasks and activities, deliveries, purchase orders, and accounting integration.
- All modules are accessible using button bar at top of every screen.
- QuickFind in all modules using major attributes or search for records using the current form.
- Colibri Studio controls user access to system features through group memberships. Groups include admin, producer, equipment room, accounting, department manager, events, and studio.
- Print current found set of records from any list screen.
- Back button on all screens goes to previous screen.
- Users can set and change their own system passwords.
- Multiple users can share the same computer using Re-Login feature.
- Multiple reports:
    - Query result list reports
    - File Management
    - Post-Processing status
    - Archive status
    - Job Revenue Projection
    - Invoice Status
    - Billing
    - Sales

- Retouching Sales
- Photographer Activity/Revenue

Calendar

- Daily, weekly and monthly formats.
- Studio/location and digital tech views.
- Low and high-resolution monitor views (Mac OS X only).
- Daily calendar entries color-coded by job status.
- Print or email daily Call Sheets.
- Color coding for current and selected dates.
- Filter calendar entries by status or studio/location.
- Search for job entries by date, client, job number, photographer and other attributes.
- Print calendar entries as a list or using different calendar views and formats.
- Navigate to job detail or equipment check in/out screens.

Contact Management

- Manage all clients and vendors.
- Manage individual contacts and relate contacts to clients or vendors.
- Maintain separate client mailing and billing addresses.
- Client credit information.
- Tasks/Activities portal to manage interaction with clients, vendors and contacts.
- Create new project record from client record.
- Create new purchase order from vendor record.
- Send emails to client and vendor contacts.
- Print client and vendor lists and labels.

Inventory Management

- Create infinite quantity of inventory types.
- Types are equipment or service.
- Serialized or pooled equipment types.
- Organize and filter similar equipment types by category.
- Assign accounting expense and revenue codes to each type.
- Set default daily prices and equipment usage costs.
- Set types to accept or not accept discounts.
- View total inventory count and quantity under repair for a single type.

- View current and future available inventory of a single type.
- Insert a picture of a type of equipment.
- Portal lists individual items for any equipment type that can be printed.
- Create barcoded item records for serialized and pooled equipment.
- Identify outsource and purchase vendors for any type of equipment.
- Create a purchase order for any type of equipment from vendor list.
- Create inventory groups: Related equipment that are always added to a job together.
- Inventory equipment items are barcoded individually.
- Purchase vendor, job history, and repair history for every item.
- Generate a new repair record and purchase order from within item record.
- Transfer an item between two locations manually.

Purchase Orders

- Purchase order types: goods and services, sales (items purchased for one job only and sold directly to the client), repair, and equipment outsource.
- Full vendor and ship to information.
- Value lists in purchase order line items are filtered to those items that you can purchase from the current vendor.
- Set payment terms and vendor discounts on a per purchase order basis.
- Override vendor item number, item description, accounting code, and unit price on a per line item basis.
- Control department and accounting approval prior to ordering.
- Print purchase order and/or email purchase orders to the vendor.
- Transfer individual or multiple line items to another purchase order.
- Enter payment method and vendor invoice number.
- Reopen posted purchase orders as necessary.

Projects, Quotes and Templates

- Generate multiple project records per client.
- Assign multiple quotes and job records to a single project to create a campaign comprised of several jobs.
- Assign a default producer, client and billing client to a project and all related quotes and jobs.
- Generate and save one or more preliminary quotes (job estimates) prior to the creation of a job record.
- Create separate quote and equipment list (backup).

- Use groups, categories and the “Frequently Used Only” checkbox to filter the type code value list for entering new line items.
- Add groups of similar equipment in a single step using the Add Groups feature.
- Aggregate categories of equipment (camera and lenses, grip and lighting, etc.) into a single billable line item via Rollup feature.
- Apply a single discount percentage to all items on an equipment list or separate discount percentages to individual items.
- Print and/or email to the client both quotes and categorized equipment lists.
- View lengthy equipment lists using high-resolution monitor views (Mac OS X only).
- Generate a template based on the current quote.
- Generate a new quote based on a named template.
- Edit templates created from quotes.

Job Management

- Generate one or more jobs related to one project.
- Jobs are automatically set to “In Progress” on first day of job.
- Create job record from a pre-existing quote or template or start a blank job record.
- Use the default contact, billing information and payment terms or override with different values as necessary.
- Navigate directly between the current job record and the studio calendar.
- Create separate job quote and equipment list (backup).
- Use groups, categories and the “Frequently Used Only” checkbox to filter the type code value list for entering new line items.
- Add groups of similar equipment in a single step using the Add Groups feature.
- Aggregate categories of equipment (camera and lenses, grip and lighting, etc.) into a single job billable line item via Rollup feature.
- Apply a single discount percentage to all items on an equipment list or separate discount percentages to individual items.
- Print and/or email to the client both job quotes and categorized equipment lists.
- Generate a template based on the current job.
- Create the job equipment pick list in one click based on the current equipment list.
- View equipment outsource requirements using the Outsource Summary report.
- Add non-billed extras directly to the pick list.
- From the Job Days tab of the Job Detail screen:

    - View the pick list for each day (2 days at a time).
    - Add items to a job in progress using the Add Item button.
    - Assign equipment from in-house inventory or outsource from an established vendor.
    - View job equipment status.
    - Access the Check Out and Check In screens.
    - Set the billable status of any piece of equipment on any day.
    - Set billable status for all equipment on a single day in one click.
    - Print the equipment check in and check out lists (with barcodes).
    - Roll over currently checked out equipment to an additional job day.
    - Copy the current job day's pick list to another job's equipment list.
- Check out, check in and exchange job equipment using the keyboard or a barcode scanner.
- View the status of all job equipment from the Check Out and Check In screens.
- Generate billable job activity records, such as deliveries, catering and coffee service, and phone usage, during an in progress job.
- Generate purchase orders for sales items related to the current job.
- Generate all equipment outsource purchase orders for a job in one click.
- Aggregate individual pick lists and job activity directly to job actuals (invoice line items).
- Set billable status of individual job actuals.
- Generate job invoice in one click.
- Edit job invoices directly as necessary.
- Print and/or email to the client approved invoices with backup detail.
- Reopen closed invoices as necessary.
- View lengthy job details (equipment and pick lists, job activity, job actuals) using high-resolution monitor views (Mac OS X only).

Tasks, Activities and Deliveries

- Record all communications (estimates, invoices, emails, phone calls, etc.) with clients and vendors.
- Create tasks with deadlines for users.
- Each user can check his/her own outstanding tasks using the My Tasks button or menu command.
- Relate and navigate between tasks/activities and individual contacts, jobs, and purchase orders.
- Record each delivery related to specific jobs.
- Create delivery records from within job records.
- Apply charges automatically to related job upon delivery completion.

Accounting Integration

- Colibri Studio offers sales and purchase order integration with QuickBooks® and Sage 50 accounting software for Windows.
- Open QuickBooks accounting software from Colibri Studio.
- Close and reopen link between Colibri Studio and QuickBooks.
- Transfer client and vendor information, jobs, invoices, and purchase orders to accounting in one click.
- Identify clients, vendors and jobs that should not transfer to accounting.
- View current count of accounts receivable and accounts payable records for transfer.
- Colibri Studio displays transfer results (success or failure) for every record.

Administrative Tools

- Admin Tools screens exist for company information, email settings, and QuickBooks license information as well as:
- Users – Create/activate/deactivate/delete users, set their default startup and calendar screens and user group memberships.
- Default values – Default Values are lists that are controlled by the administrative user. Create groups and categories for inventory, job locations, and type and titles for clients, vendors and contacts.
- Accounting Codes – Every inventory type has an accounting code (revenue and/or expense). Edit the Accounting Code list in Colibri Studio to conform to your accounting system.