



**Chemuturi Consultants – Do it well or not at all**

## **Personal Effectiveness Tool – PET**

### **Introduction**

PET or Personal Effectiveness Tool is a software tool to assist you to increase your effectiveness in your life. It tickles your memory about your appointments, anniversaries, phone numbers, addresses, email ids, and web site URLs. It assists you to keep track of your income and expenditure, and use of vehicles. It gives you a snap shot of activities for the day – **Actions for the Day**.

What is more, you can use **PET** for your entire family or in your office also! It allows you to manage –

1. Your as well as other's appointments
2. Your health as well as other's health
3. Your vehicles or other's vehicles

We intend it to be you're your faithful Pet.

PET comes to you with the following facilities

1. **Actions for the day** – snap shot of your actions for the selected day, namely, your Appointments, Anniversaries, Vehicles, and Financials
2. **Anniversaries** – to keep track of the anniversaries your friends and relatives so that you would not forget any important anniversary
3. **Finance** – assists you keeping a record and track of your income and expenditure
4. **Personal Health** – this assists you in keeping track and record of the health details your close kith and kin
5. **Phone Book** – to store and retrieve phone numbers, addresses, email ids, web site URLs of your friends and relatives
6. **Time Manager** – to manage your appointments and your time effectively
7. **Vehicles** – to keep track of usage of your vehicles

These facilities can be accessed from the initial selection form presented to you on invocation of **PET**. You can also access them from top **File** menu

These are explained in greater detail in the subsequent sections

### **First things first**

Before you start using the facilities provide in PET, fill-in the setup info first.

Access **Setup** from **Tools** menu – it will display the setup screen. Fill in the following info –

1. **Your Name**- this is just for info sake – it can be up to 50 characters



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2. **Month in which Financial Year begins** – this is necessary to compute your income and expenditure – select any one of the 12 months provided in the box

Clicking on **Save** button to save the info.

### Actions for the Day

This screen shows four tabs, namely,

1. **Appointments** – this tab shows the appoints for the current date
2. **Anniversaries** – this tab shows anniversaries in the coming 7 days that is from current date till next seven days
3. **Vehicles** - this tab shows the current details of your vehicles
4. **Financials** - this tab shows your financial position as on the day – that is expenses coming up/due and the position of loans you have taken

This is to tickle your memory about the actions you need to take.

### Anniversaries

This screen facilitates recording of anniversaries. By anniversaries we mean yearly event that are important to you. These can include, but not limited to –

1. **Birth Days** of near and dear ones
2. **Wedding anniversaries** of yourself and your near and dear ones
3. Day to file **tax returns**?
4. **Company formation** day?
5. Any other **important day** that comes once a year

To record an anniversary –

1. **First Name** – this could be the name of the person or the event you wish to remember – up to 50 characters
2. **Middle Initial and Last Name** – initial and last name, if any. Initial is one character and last name is up to 50 characters
3. **Anniversary (Month/Day)** – select the month and day for the anniversary
4. **Occasion** – select or enter the details of the occasion – can be up to 255 characters

Clicking on **Save button** would save the info.

**If you wish to modify –**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.



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3. Make desired modifications and **click on Save** button

### **If you wish to delete any anniversary -**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select “**No**” - the delete action would be cancelled

### **Finance**

Finance comes with four tabs namely,

1. **Summary** – this tab shows the summary of Income and summary of expenditure from the beginning of the financial year till date.
2. **Income Budget** – facilitates recording the possible incomes that you may generate
3. **Expense Budget** – facilitates recording the possible financial obligations you currently have
4. **Actuals** – facilitates recording the actual income earned by you and expenditure incurred by you

### **Summary Tab**

#### **Income list shows –**

1. Serial number
2. Head – head of income that you defined in budgets
3. Budgeted to date – shows how much you should have earned till date
4. Actual to date – shows how much you actually earned till date
5. Variance – shows you the difference between the budgeted income and the actual income

#### **Expense list shows –**

1. Serial number
2. Head – head of expenditure that you defined in budgets
3. Budgeted to date – shows how much you should have spent till date
4. Actual to date – shows how much you actually spent till date
5. Variance – shows you the difference between the budgeted expenditure and the actual expenditure



## Income Budget tab

This tab facilitates budgeting of your probable income. The following details need to be entered

1. **Source of Income** – this could be salary, honorarium, royalty and so on.- up to 50 characters
2. **Periodicity of Income** – select the one of the choice, namely,
  - a. **Assignment based** – it is one of income – you get it when you execute the assignment you procured
  - b. **Fortnightly** – you get this in a recurring manner every 15 days – you need to enter two dates when you are likely to receive it
  - c. **Half yearly** – this could be interest income comes every six months – you need to enter two months and corresponding dates for these two expected receipts
  - d. **Monthly** – could be your salary income – you need to enter the probable date of receipt
  - e. **Quarterly** – could be interest income – you need to enter four months and corresponding date of probable receipts
  - f. **Weekly** – could be your wages – nothing further needs to be entered if you select this option
  - g. **Yearly** – this could be an annuity such as dividend income – you need to enter the month and corresponding date of probable receipt of this income
3. **Amount of Income per installment** – enter the probable amount of money expected to be received per installment

Clicking on **Save** button would save the info.

Repeat the above steps until all your probable incomes are entered.

### If you wish to modify any item –

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

### If you wish to delete any item -

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select “**No**” - the delete action would be cancelled



## Expense Budget tab

This tab facilitates budgeting of your probable expenses. The following details need to be entered

1. **Expense** – head of expenditure this could be food expense, entertainment, house rent and so on.- up to 50 characters. You may select an existing one or add a new one
2. **Periodicity** – select the one of the choice, namely,
  - a. **Fortnightly** – you get this in a recurring manner every 15 days – you need to enter two dates when you are likely to receive it
  - b. **Half yearly** – this could be recurring expense once every six months – you need to enter two months and corresponding dates for these two expected expense
  - c. **Monthly** – could be a monthly expense like rent – you need to enter the probable date of expense
  - d. **Quarterly** – could be occurring once every three months like insurance premium – you need to enter four months and corresponding date of probable expense
  - e. **Weekly** – weekly expenses like groceries - nothing further needs to be entered if you select this option
  - f. **Yearly** – this could be club membership – you need to enter the month and corresponding date of probable expense
3. **Amount of expense per installment** – enter the probable amount of money expected to be spent per installment

Clicking on **Save** button would save the info.

Repeat the above steps until all your probable incomes are entered.

### If you wish to modify any item –

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

### If you wish to delete any item -

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select “**No**” - the delete action would be cancelled



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### Actuals

This tab facilitates capturing your actual income and expenses as they happen. As there is no limitation of database size you can enter even micro-level expenses.

#### The following need to be entered –

1. **Head** – select the appropriate head of expense or income. Here you cannot add a new one. If you wish to add a new one – do it in the budget tabs
2. **Narration** – enter a description of the expense or income – up to 100 characters
3. **Date** – select the date on which the income was received or the expense was made
4. **Amount** – enter the amount of income or expense
5. **Nature(Income/Expense)** – select either of the choices provided based on what you are entering
6. Clicking on **Save** button would save the info

#### If you wish to modify any item –

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

#### If you wish to delete any item -

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select “**No**” - the delete action would be cancelled

### Personal health

This screen facilitates in recording health details of your family members. This screen comes with four tabs, namely,

1. Personal Details
2. Medical History
3. Disease History
4. Weight Watch

These are explained in greater detail below.

Before you access any of these tabs and enter details on it – make sure that you entered the name of the person (up to 50 characters) in the box captioned Name of the Person (or



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selected the appropriate person from the choices provided in that box. The details you entered would be attributed to the person, named in that box.

### Personal Details Tab

The following details are captured

1. **Sex** – select male or female
2. **DOB** – Date of birth
3. **Height** – in Feet and Inches – in separate boxes

Clicking on **Save** button would save the info.

You may repeat the above steps to store info for as many persons as you desire.

### If you wish to modify any item –

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

### If you wish to delete any item -

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select **No** - the delete action would be cancelled

### Medical History Tab

This tab captures medical events for each of the persons to keep records and to make them available when necessary - like –

1. **Any medical procedures**
2. **Tests**
3. **Medication**

The following info is captured –

1. **Event** – you can enter the medical event (such as a procedure, test, medication etc.) – (up to 50 characters) or select the existing choice
2. **Description** – description of the event – additional detail – up to 100 characters



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3. **Length / Period** – the length of the duration of the event – in number of days
4. **Date** – select the date on which the event commenced

Clicking on **Save** button would save the info.

You may repeat the above steps to store info for as many times as is necessary.

### **If you wish to modify any item –**

4. **Locate the row** containing the desired info and double click on it.
5. The boxes would be filled with appropriate values.
6. Make desired modifications and **click on Save** button

### **If you wish to delete any item -**

6. **Locate the row** containing the desired info and double click on it.
7. The boxes would be filled with appropriate values.
8. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
9. If you select **Yes** – the item would be deleted
10. If you select **No** - the delete action would be cancelled

## **Disease History Tab**

This tab captures diseases suffered by each of the persons to keep records and to make them available when necessary.

The following info is captured –

1. **Disease Name** – you can enter the name of the disease – (up to 50 characters) or select the existing choice
2. **Date3 of Diagnosis** – Select the date on which the disease is diagnosed for the person
3. **Cured on** – select the date on which the disease was cured

Clicking on **Save** button would save the info.

You may repeat the above steps to store info for as many times as is necessary.

### **If you wish to modify any item –**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button





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### If you wish to delete any item -

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select **No** - the delete action would be cancelled

### Weight Watch tab

This tab assists you in keeping track of your weight and present it in a graphical form so that you can visualize the trend and take appropriate action as you deem fit. The following info is captured –

1. **Periodicity of Graph** – select the options
  - a. Last 45 days
  - b. Last 90 days
  - c. Last 1 year
2. **Recording Date** – this is the date of taking the reading of your weight
3. **Weight** – enter the weight – be consistent in the unit of weight – Pounds or Kilograms – every time you enter the weight

Clicking on **Save** button would save the info.

You can see the graph on the right hand side of the screen.

You may repeat the above steps to store info for as many times as is necessary.

### If you wish to modify any item –

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

### If you wish to delete any item -

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select **No** - the delete action would be cancelled



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### Phone Book

Phone Book facilitates entry of details of your acquaintances, store them and retrieve them or print reports

The following details need be entered

1. **Name of the Person** – up to 50 characters
2. **Address** in two lines each of 50 characters
3. **City or Town** – up to 50 characters
4. **State** – up to 50 characters
5. **ZIP** – postal code – up to 10 characters
6. **Email id** – up to 100 characters
7. **Web Site URL** – up to 100 characters
8. **Country Code** – for phone numbers – up to 10 characters
9. **Home Phone** – up to 15 characters
10. **Work Phone** – up to 15 characters
11. **Mobile** – cell phone number – up to 15 characters
12. **Updated on** – date on which you created / updated the information for the person
13. **Additional Info** – you may enter any other relevant info on the person up to 255 characters

Clicking on **Save** button would save the information

Clicking on **Clear** button would clear the information from all the boxes

Clicking on **Exit** button would remove the screen.

### How to locate info

By clicking on the header in the list, the info in the list would be sorted in ascending order based on the info in the column. For example – if you click on the column **Name** – the information in the list would be sorted in the alphabetical order of the names of persons. If you click the column **Home Phone** - the information in the list would be sorted in the alphabetical order of the Home Phone numbers of persons.

If you wish to locate info By Name -

1. You may click on the column containing names and sort them in ascending alphabetical order. Then you may locate the row containing the desired name and double click on it. The info would be loaded in the boxes for your perusal.
2. You may also click the box captioned **Name of the Person** and locate the name and select it. The info would be loaded in the boxes for your perusal.

If you wish to locate by any phone number or city, zip code etc –

1. You may click on the column containing names and sort them in ascending alphabetical order.



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2. Then you may locate the row containing the desired name and double click on it. The info would be loaded in the boxes for your perusal.

### Time Manager

Time Manager assists you in managing your time or for any other person also. It will assist you to fix appointments and retrieve appointments for any day

### Fix appointments –

1. **Visitor's Name/Task** – here you may enter / select the name of the task or the name of the person you are meeting – for dedicating the time – up to 50 characters
2. **For whom** – here you may enter / select the name of the person **for whom** the appointment is being made – it may be yourself if you are using PET only for yourself. But if you are using this for your family or office, you may enter the name of the person for whom this appointment is being made – up to 50 characters
3. **Phone** – this is provided to capture the phone number of the visitor – so that you can call him later if you need to – up to 50 characters
4. **Mobile** – this is provided to capture the mobile number of the visitor – so that you can call him later if you need to – up to 50 characters
5. **Select Date** – this the date for which the appointment is being made – select appropriate date
6. **Start Time and End time** – select the times of the appointment
7. **Purpose of Appointment** – you may enter purpose of appointment – up to 255 characters. Here you may also enter what transpired during the appointment for your record.

Clicking on **Save** button would save the information

Clicking on **Clear** button would clear the information from all the boxes

Clicking on **Exit** button would remove the screen.

To retrieve appointments for any day, just select the desired date from the box captioned **Select Date** and all the appointments of that date would be filled in the list.

By clicking on the header in the list, the info in the list would be sorted in ascending order based on the info in the column. For example – if you click on the column **For Whom** – the information in the list would be sorted in the alphabetical order of the names of persons. If you click the column **Date** - the information in the list would be sorted in the alphabetical order of the Dates.

To change or update an appointment –

1. Locate the row containing the desired appointment in the list of appointments
2. Double click on the row and the info would be filled in the boxes appropriately
3. Make the desired changes and click on **Save** button



## Vehicles

This screen facilitates in recording details about your vehicle details. This screen comes with three tabs, namely,

1. Vehicle Summary
2. Vehicles Details
3. Maintenance History

These are explained in greater detail below.

### Vehicle Summary Tab

This tab shows the list of actions to be taken. It shows a list with the details of –

1. **Serial Number**
2. **Vehicle Registration Number**
3. **Next oil change** – this is the odometer reading at which oil needs to be changed
4. **Next Servicing Reading** - this is the odometer reading at which the vehicle needs to be serviced

### Vehicles Details

The following details are captured

1. **Vehicle Reg. No** – The registration number provided by the government authorities – up to 12 characters
2. **Date of Purchase**– Date on which you purchased the vehicle
3. **Date of Manufacture** – select appropriate date
4. Vehicle Type – select one of the choices, namely,
  - a. Car-Coupe
  - b. Car-Limo
  - c. Car-Luxury
  - d. Car-Pickup
  - e. Car-Sedan
  - f. Motorbike
  - g. Scooter
  - h. Super Bike
  - i. Truck-mega
  - j. Truck-Mini
5. Vehicle Finance – how the vehicle was financed –
  - a. Own Money
  - b. Loan from Bank



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- c. Loan from Manufacturer
- d. Loan from Dealer
- e. Loan from Employer
6. Name of the Financier – name of the agency from which the loan is taken
7. Loan Money – amount of Money taken as loan
8. Loan Installments – number of installments in which the loan needs to be repaid
9. Odometer readings
  - a. Present Reading – the reading at which you are entering details of the vehicle into PET
  - b. At Purchase – odometer reading when you purchased it
  - c. Miles for Oil change – miles between two successive oil changes. This would be used to alert you for next oil change.
  - d. Last Oil Change – odometer reading at the time you changed oil in this vehicle.
  - e. No of Miles for service – recommended miles between two successive services. This would be used to alert you for next service
  - f. Last Service Reading – odometer reading when you got the vehicle serviced last time

Clicking on **Save** button would save the info.

You may repeat the above steps to store info for as many vehicles as you desire.

### **If you wish to modify any item –**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

### **If you wish to delete any item -**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select **No** - the delete action would be cancelled

## **Vehicles Maintenance**

The following details are captured

1. Vehicle Number – select one of the choices provided
2. Event – Enter the maintenance event that took place – up to 50 characters
3. Odometer Reading – reading at the time of the maintenance event
4. Money Spent – enter the amount of money expended on the maintenance event



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5. Date of Maintenance – select the date on which the maintenance event was carried out

Clicking on **Save** button would save the info.

You may repeat the above steps to store info for as many vehicles as you desire.

### **If you wish to modify any item –**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. Make desired modifications and **click on Save** button

### **If you wish to delete any item -**

1. **Locate the row** containing the desired info and double click on it.
2. The boxes would be filled with appropriate values.
3. **Click on Delete button** – a message – “**Do you wish to delete?**” would be displayed.
4. If you select **Yes** – the item would be deleted
5. If you select **No** - the delete action would be cancelled

## **Reports**

PET comes to you with quite a few significant reports for your use. These are –

### **Phone and Address Book Reports**

1. Address Labels – gives the address of all the persons in your phone and address book
2. Email Ids and Web Site URLs – just the name and the email id as well as the web site URL
3. Name and Phone Numbers – just the name and the phone numbers, namely, home phone, work phone, and mobile
4. Phone and Address Book – full info of the persons in the phone and address book

### **Time Manager Reports**

1. Appointments – appointments between the selected dates

### **Anniversaries Reports**

1. Anniversaries – anniversaries between the selected dates



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### **Financial Reports**

1. Actual Expenses History – list of all expenses incurred by you between selected dates
2. Actual Income History – list of all income earned by you between selected dates
3. Income Expenditure Statement – a statement of income and expenditure – summary for each head – between the selected dates

### **Personal Health Reports**

1. Disease History – between the selected dates, for a selected persons
2. Medical History – between the selected dates, for a selected persons
3. Weight Watch – between the selected dates, for a selected persons

### **Vehicle Reports**

1. Vehicle Maintenance History – between the selected dates
2. Vehicle Maintenance Summary – between the selected dates

### **To generate a report,**

1. Select the desired report from the box captioned Select Type of Report
2. Supply other info like dates and name of the person
3. Click on Generate button – the report would be displayed

Once the report is generated, you may,

1. Print the report on your printer by clicking on the printer icon. We strongly recommend that you save the file to a PDF format and then print from that file rather than printing directly from PET
2. Save the report to a disk file – to a desired format like PDF, MS Word etc, by clicking on save icon

### **Support**

Please contact Chemuturi consultants –

1. Email – [murali@chemuturi.com](mailto:murali@chemuturi.com)
2. Phones – India – 040-2722-0771 or 98850-19461 – mobile
3. USA – 347-394-3138

We will appreciate your feedback



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