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Less time!



More data!



More to analyze!



Less frustration!

JobTrac

Program Manual

Version 1.00

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Chapter 1

Installing TechWare JobTrac

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Requirements

To use TechWare JobTrac for Windows, you need the following equipment and supplies:

- Pentium Processor II 233 IBM-PC compatible or higher with 250MB of hard drive space
- 64MB RAM.
- VGA Monitor, SVGA monitor or better.
- Windows 98, NT, 2000, XP.
- TechWare JobTrac for Windows install diskettes or CD (compact disc).
- Laser or Ink Jet Printer supported by Windows.



Installation for Windows

To Install JobTrac :

1. **Insert the JobTrac CD in you computer's CD tray. Your operating system should be set up with the Auto Run feature. If this feature is not available. *Select Setup* from *Disk 1*. The following will display on your monitor.**
2. **Click on the “Next >” button to continue.**
3. **Click on the “Next >” button and TechWare JobTrac will be installed in the *C:\JobTrac* directory of your *Program Files* program group. (JobTrac will create the directory if it doesn't exist.)**

NOTE: TechWare JobTrac can be installed in a different directory as well as a different Program Group by selecting the “Browse” button in the Destination Directory area.

4. **Click on the “Next >” button. The install program will create a Program Folder for JobTrac .**
5. **Click on the “Next >” button to start copying JobTrac files to your computer.**
6. **After all *JobTrac* files have been installed on your computer, the following will display on your monitor. Simply click on the “Finish” button. You are ready to run JobTrac ! Note: If install says computer needs to be rebooted, wait until install is complete.**

JobTrac is now updated and ready for use.





Chapter 2

What is JobTrac ?

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TechWare's JobTrac allows you to enter and keep track of vast amounts of order, shipping and inventory information. It provides an effective tool for compiling and storing valuable sales statistics. JobTrac will allow you to gather these statistics through extensive reports on many variables that you thought were impossible to efficiently generate. JobTrac is sure to become an indispensable tool in any business office.

The following sections introduce you to the main features of JobTrac . You'll see how each feature helps you organize and collect your data so you get a complete picture of the quality you are producing.



JobTrac Features

At TechWare Incorporated, we strive very hard to make the use of our applications as easy and painless as possible. We have made entering data as efficient as possible with the use of Drop Down Lists wherever possible. Below are some of the features of JobTrac

Flexibility

Edit any data...

Data can be accessed for as long as you want, and it's always editable. JobTrac allows you to correct mistakes easily.

...but still protect your valuable data from unwanted changes.

TechWare JobTrac has a password feature that gives you control over who can make changes to data. Users can be assigned rights such as **read-only**, this feature will allow users the capability to print a report or create a graph, but will not allow them to change any data. JobTrac has other security measures such as **write**, **delete** and **pack** rights. These features require supervisor access and are described in more detail later in the manual.

Create JobTrac company profiles all at once or a little at a time.

JobTrac has the ability to create lists that are used for drop down lists as well as error correction. JobTrac does not require you to enter these lists all at once; they can be created "on the fly", as you need them. Some lists make more sense to do in advance, but that is entirely up to you!

Fast Data Entry

JobTrac has several features to make data entry quick, consistent and easy to use.

Drop Down List selection

In areas that require data entry, JobTrac has a feature that allows a list to be displayed in a window called a **drop down list**. This feature lets you scroll through the list and select the desired item. This saves time and ensures that you enter names, companies and so on, in a consistent manor every time.

Field Verification

Fields that are manually entered and have a drop down list associated with that field are automatically checked against the list and the entered value. If the value is not the same as the list, a message is displayed explaining that the value is not in the list. At this point, the user can select to keep the value or change and make adjustments accordingly.

Find Data Instantly

JobTrac data is stored in tables that are indexed in a number of different ways. This allows a user to search for data in numerous ways. This feature alone can be a valuable time saver. There are a couple of ways to search data, both of which will be explained later in this chapter.



Ordered Search

Imagine for a minute, a list of things that you have written down in numerical order. Now, say for example, that you would like that same list in alphabetical order. To do so would require you to re-write the list which could be very difficult, if not impossible for a large list. JobTrac has the ability to give you these lists in many different ways with just a click of a button!

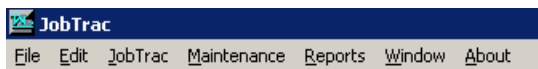


Understanding and Using this Manual

JobTrac is accompanied with a manual that will help in solving questions a user may have. It would be wise to read the manual thoroughly before getting into JobTrac. If necessary, use the manual along with the JobTrac program to obtain a better feel for the working environment.

The JobTrac manual is set up to allow the user the ability to follow along with ease. Diagrams and helpful shortcuts are located throughout the manual. In this section, the make-up of the manual will be described.

Within JobTrac, there are numerous menus and screens that help the user make their decisions. These menus are commands, which perform a JobTrac task. In this manual all of these menu items are completely explained. The use of menu diagrams along with the associated screen will be explained first.



Above is a clip of the JobTrac Menu Bar. From the Menu Bar, options can be selected in two ways. With a mouse, simply click on the word to obtain its pull-down menu as shown here, or select the option by pressing the letter of the command that is underlined. To activate the Menu Bar, press the **Alt** key simultaneously with the underlined letter.



*For example, to activate the Maintenance Screen, press **Alt M**. The arrow up/down keys can be used to make your final selection. (to activate the sub menu bar, press the Shift key simultaneously with the underlined letter. i.e.: **Shift C** will access Customers.*

Within this manual, there are several clips of screens and pull down menus. These are created to help the user gain a better understanding of both the manual and the program. Some screens may look similar, but pay close attention as most perform different functions. This manual takes a step-by-step look at the commands within JobTrac. Each of JobTrac's commands is explained in detail below their appropriate menu box. Command topics are large letters left of the page. Below them is a description of the function's exact purpose. Also, there may be helpful hints located in different commands.

At the end of each description, there is often a bold face phrase to the left of center. This is known as a **keyboard shortcut**. Simply pressing a few keys can access certain functions in JobTrac. This saves time by skipping the menu bar and associated screens. Each command with a shortcut key has its own unique key throughout JobTrac.



Within this manual, **keyboard shortcuts** will be designated in bold type. An example of what the shortcut key would look like in the manual is:

Exp: **Keyboard Shortcut: Ctrl-A**

This manual's main purpose is to enable the user to become more comfortable with the JobTrac program. If read completely, the task in using JobTrac will be made much simpler. If a problem were to arise, the manual would be a guide to assist one in solving the dilemma. This manual will follow the order of the pull-down menu bars. As mentioned above, JobTrac has multiple ways in which commands can be executed. In some instances, commands can only be accessed via the menu screens or only by the pull-down menu bars.



Introduction to General Areas of JobTrac

Throughout JobTrac, the user may encounter similar commands on different screens. For example, some of the reports contain the same basic setup. It is for this reason that this section is being presented. This area will allow the user to become comfortable with the commands used frequently in the JobTrac program.

Tab and Arrow Keys

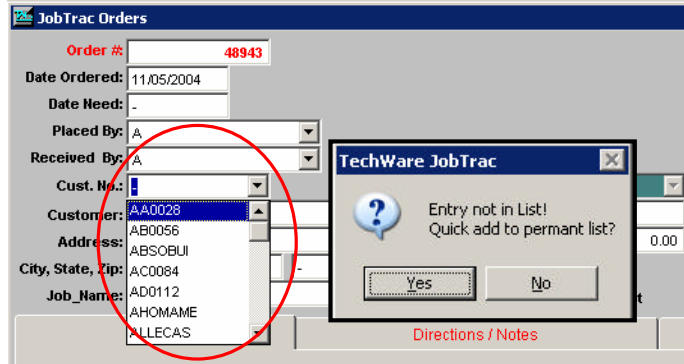
One of the most basic principles about JobTrac is that of keystrokes. The use of keyboard **shortcuts** has been explained earlier (Chapter 1- Using This Manual), but there are also other important keyboard functions. An example of this would be the **tab** key. When searching for commands in the various menus, it is possible to move through each function without actually performing them. By pressing the **tab** key, the user can move the highlighted area to a different action listed on the screen.

An alternative to the **tab** key is the arrow keys. The arrow keys work in much the same manner as the **tab** key except for the one major difference. The arrow keys move to every character within a field, whereas the tab key, when pressed, will move to the next field immediately, if the user passes the desired field, they can simply press **shift-tab** to reverse the direction. Both choices work well in performing their purpose of selecting items.

Drop Down Lists

One of the best features JobTrac has is the ability to display lists of employees, companies, customer numbers, and products.

Any time a down arrow is at the end of a selection field, a **Drop Down List** can be used. Simply click on the arrow to display all items within the list. By using the up and down arrow keys to navigate through the list, the user can choose the correct item. The user can also key in a name, JobTrac automatically checks that value against the drop down list. If the name is incorrect or not in the list, an option is given to allow the keyed name to remain, or be changed before continuing. With these two features, erroneous data can be kept to a minimum.



JobTrac Toolbar Icons

Most screens within JobTrac have the same toolbar located at the bottom of the data sheet. Below we will review the functions of each icon.

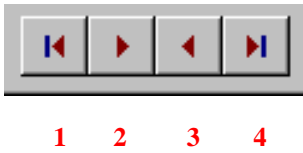


Note: The function of each command is displayed on screen by using the mouse to point your cursor at a Control Icon (do not click the mouse).



Controls

All users should become familiar with the controls section of the navigation bar. This box contains commands that can be used to move to different records within the table.



- 1) The **Top of file** button moves to the beginning of the table.
- 2) The **Next** button is used to move to the next record in the table. (The "next" record is listed in numerical order by Project.)
- 3) The **Previous** button is used to return to the previous record.
- 4) The **Bottom of file** button moves to the end of the table.

Find/Search - JobTrac



Users can choose the **Find** command to search for items in the table.

Once the "find" function is selected, the user will be presented with a menu that contains a number of different search topics. Use the arrow keys to navigate through the list or, with

a mouse simply click on the field you want to search. Some fields, such as Customer Number, Destination, County and Products have the drop down list feature, which enables the user to easily select the correct search criteria. After you have entered your search criteria, begin your search by simply clicking on **Find It!** Within seconds, JobTrac retrieves the record you need.

The screenshot shows the 'Order Search' dialog box. It has several input fields: 'Order #', 'Ticket #', 'Date Ordered' (with 'Start Date' and 'End Date' sub-fields), 'Cust. No.' (a dropdown), 'Job Name', 'PO No.', 'Destin.' (a dropdown), and 'County' (a dropdown). On the right, there is a 'Products' section with a list of items: '#600 DETERGENT', '#800 STAIN REMOVER', '30DG 30 DEGREE BRICK', '45DG 45 DEGREE BRICK', '901 901 OUTSIDE AIR VENT', and '901R 901-R OUTSIDE AIR VENT'. At the bottom, there are two buttons: 'Find It!' and 'Cancel'.


For example, if the user wants to search for a particular Ticket Number, the user would:

- 1) Select the Ticket Number field and key in the ticket number needed for review.
- 2) Click on **Find It!** This starts the search.

JobTrac will display the data screen. It's really that easy!

To search for another record, press the **Enter** key and the search box will be displayed. The user can then key in fresh criteria. To return to the normal mode, select **Cancel** on the search box display

This screenshot is identical to the one above, but with three red circles highlighting specific elements: one around the 'Ticket #' field, one around the 'Find It!' button, and one around the 'Cancel' button.

Note: When in the Search mode, the search icon on the JobTrac data screen toolbar will be highlighted red,  and only data meeting the search criteria will be displayed.



Find/Search – Maintenance



From *Maintenance* on the *Main Menu*, the *find/search* command is somewhat different. Once the *find* function is selected, the user will be presented with a menu that contains a number of different search topics. Use the arrow keys to scroll through the list. Users with a mouse can simply click on the arrows at the right hand side of the search box. Once the user selects a topic, they must enter the desired field to search. For example, if the user wants to search for a particular city in the customer list, the user would:

- 1) Select the field name relating to plant code from the drop down menu (in this example; CITY is used).
- 2) Select an operator from the Operator drop down menu (in this example; = is used).
- 3) Type your search criteria into the Value box (in this example; MOORESVILLE is used).
Whole words as well as partial ones, or even single letters can be used in the search.

The screenshot shows a 'Search' dialog box with the following elements:

- Field:** A dropdown menu with 'CITY' selected.
- Operator:** A dropdown menu with '=' selected.
- Value:** A text box containing 'MOORESVILLE'.
- Logic:** Radio buttons for 'And' (selected) and 'OR'.
- Text Area:** Displays the constructed search criteria: 'CUSTOMER.CITY='MOORESVILLE''.
- Buttons:** 'Add', 'Find It!', and 'Cancel'.

- 4) Click on the **Add** button. Your search criteria should be displayed in the box.
- 5) Click on **Find It!** This starts the search and within seconds all Customers with the “City” of Mooresville are displayed.

Find/Search – Maintenance Notes: When in the *Search* mode, the search icon on the JobTrac data screen toolbar will be highlighted red, and only data that meets the search criteria will be displayed.

If you have more than one set of criteria, (search by plant code AND line number) select either “and” or “or” and then repeat steps 1 through 4 before you select **Find It!**





Selecting “and” means BOTH criteria must be met. Selecting “or” means EITHER criteria can be met.



New/Edit/Save/Undo

On most of the JobTrac screens, there is a set of four commands labeled: **New**, **Save**, **Undo** and **Delete**.

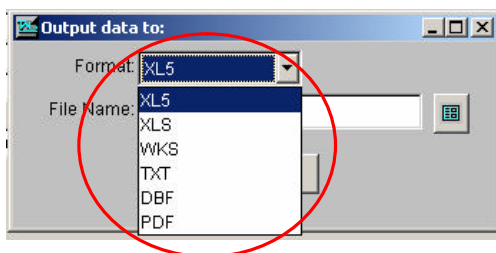
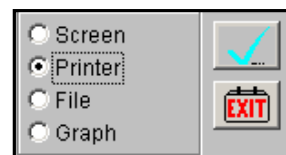


-  The **New** button allows the user to create a new Project, Sample, Package or Rep.
-  The **Save** button naturally saves any changes made to any record.
-  The **Undo Changes** button will cancel your last transaction.
-  The **Delete** function will tag a record for deletion. When pressed again, the record is unmarked for deletion.

Deleting records in JobTrac is analogous to throwing a piece of paper in a trashcan. You can always retrieve the paper as long as the garbage collectors have not picked up the trash. When records are **Packed**, all records tagged for deletion are **permanently removed from the database**. More information on **Pack** can be found in Chapter 5.

Output Device

Another common area of JobTrac is that of the Output Device screen. Once a report form has been completed, the user can select the device in which the media will be transferred. The operator can select **Screen**, **Printer**, **File**, or **Graph**. This manual assumes that you have already defined your printer or printers in Windows. With this in mind, if you select **Printer**, JobTrac will send the report to the default printer.

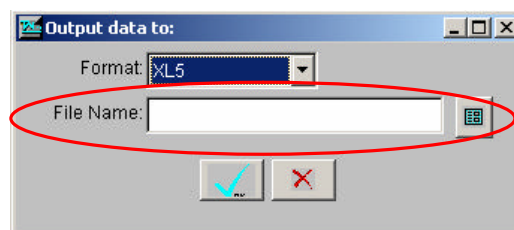


The **File** option allows you to export the contents of the query to a file.

Format: This field will allow the user to select; Excel (XLS), Lotus123 (WK1) or comma delimited ASCII (delimited) as well as DBF, TXT and PDF format from the drop down list. *Note: PDF is an option, if your system does not include, contact TechWare for more information.*

File Name: This field is used to name your file and "browse" for a path or location to store the file on your computer.

Note: the default path is the **Xfer Path** listed in the JobTrac **System Setup**. For more detail see *Chapter 3, System – System Setup*.





Chapter 3

System

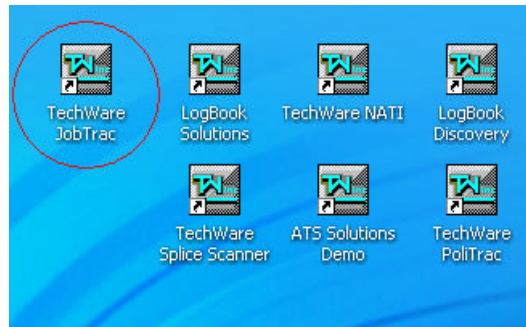
Access / Login	3.1
About JobTrac	3.2
Logout	3.2
System Setup	3.3

Access and Login

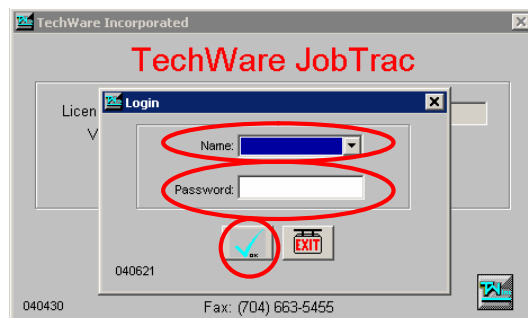
The "**Login**" function logs the user into a JobTrac database. Logging in is necessary when a user needs to add or edit a record. Each user has certain rights associated with their user name and password. These rights are defined in the "Employee Set-Up" screen found in Chapter 5. Users that do not login are given "guest" rights. This only allows them to print reports and review data.

Keyboard Shortcut: "Ctrl - L" Login can be accessed from the Main Menu screen by pressing "L" or by selecting "Login" from the System Menu bar.

- 1) From the main *Windows desktop*, double click on the JobTrac icon.

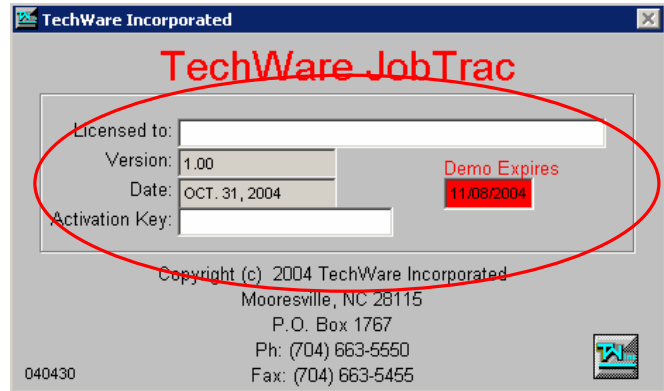


- 2) The **Login** screen will automatically display. Click on the down arrow to the right of the NAME field. A drop down list will provide all the users names. Click on your name to select it from the user list and press enter. Type in your passwords and click on the checkmark icon.



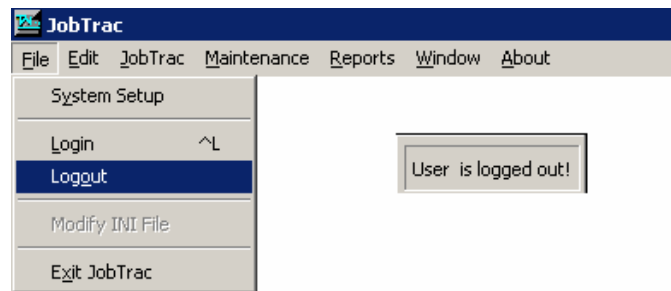
About JobTrac

The "About JobTrac" function explains the registration and license of the JobTrac Program. This allows the user to check on the serial and version number. If a version of JobTrac is installed as a demonstration, this screen will give the expiration information. If your version of JobTrac expires, call TechWare Incorporated for an activation key.



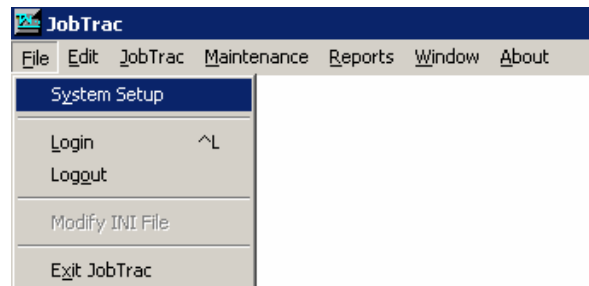
Logout

"Logout" by selecting "Logout" from the System Menu Bar. The "Logout" command returns the user to the "guest" status and allows only those "rights" associated with the "guest".



System Setup

The "System Information" screen can be accessed by selecting "File" and then "System Setup" from the JobTrac Main Menu bar.

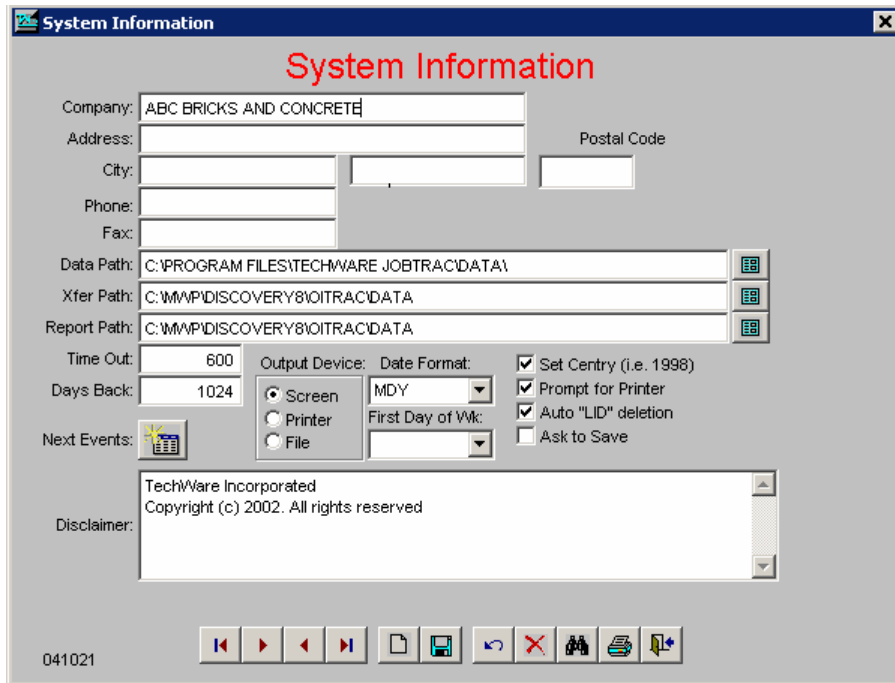


The **System Information** screen is used to define the default settings used throughout JobTrac.

The **Company Input** area allows the user to enter the company name, address and so forth.

"Data Path" specifies where JobTrac will search for the data files.





"**Xfer Path**" is used as a method to copy data to another directory. A situation where this feature would be useful would be when an AS/400 is used to collect daily averages from various locations that are using JobTrac.

"**Report Path**" specifies where JobTrac will search for report files.

"**Time Out**" is used as a security feature that enables JobTrac to log a user out after a designated time of inactivity. The input is in seconds; therefore, a value of 300 would "Time Out" in five minutes.

"**Days Back**" is used to tell JobTrac the length of time to go back and get active data only. Reports can be generated for any length of time

"**Output Device**" is the default setting used to tell JobTrac where the output will go. The settings are "Screen, "Printer" or "File". For more information on this topic, refer to Chapter 2, Introduction to General Areas of JobTrac.

"**Date Format**" is used to tell JobTrac to use MDY, DMY or YMD format for date.

"**First Day of Week**" is used to capture and calculate data for reports and graphs.

"**Set Century**" is used to display four digit date.


"**Prompt for Printer**" is used to display system printer options when reports are selected.

"**Auto Lid Deletion**" is used to automatically delete raw data files. If checked, any data already converted, will be deleted if it is over 2 weeks old.

"**Ask to Save**" If checked, the user will see a prompt to save records.

"**Disclaimer**" can be used to print a disclaimer on various reports at the bottom of the page.



"Next Events"  Selecting this icon will enable the following screen:

Customer #	Destination	Order #	Ticket #	Supplier #	Category #	Order Item #	Production #
321	212	48939	110184	1	8	5343	6

This table allows the user to change the sequential numbering of orders, customers etc. Its content informs JobTrac of the next number(s) it should use in any of these fields.

This feature should be used with caution!



Chapter 4

JobTrac

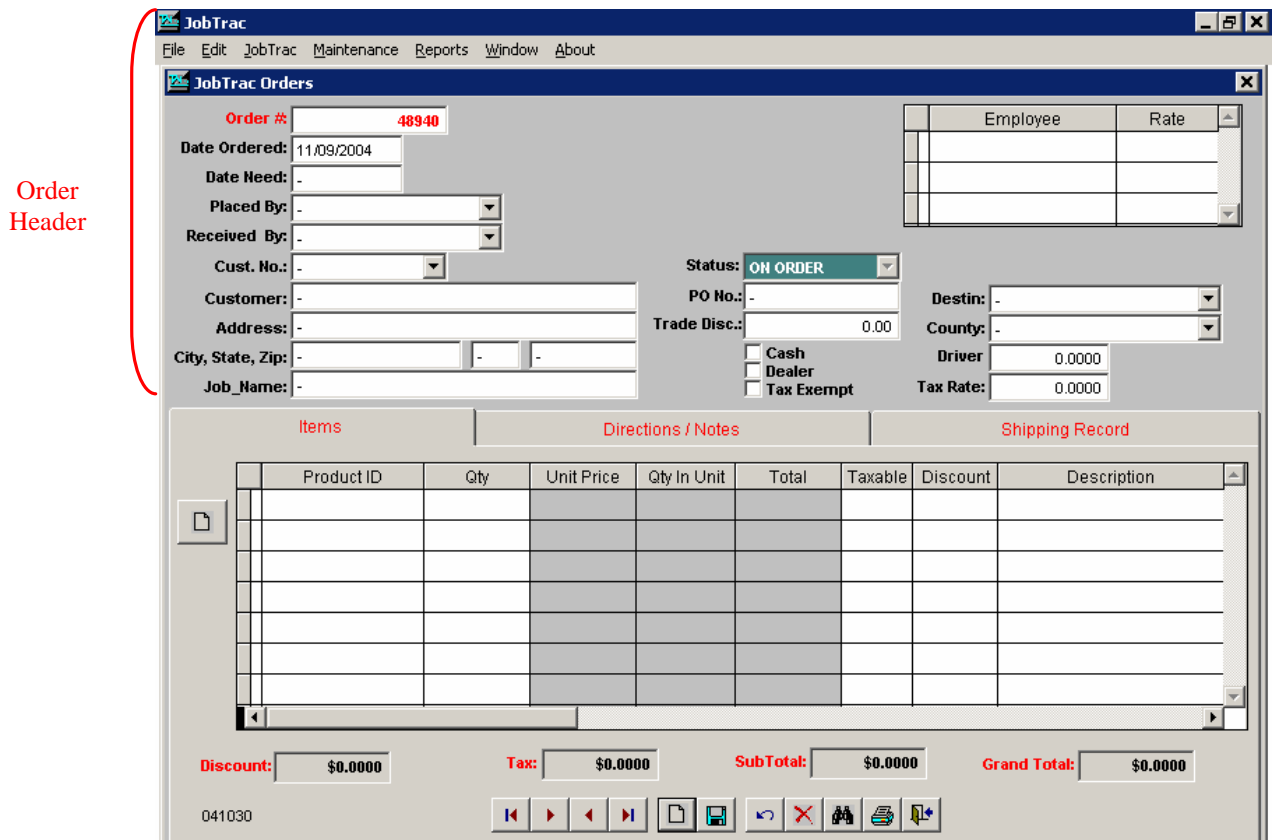
JobTrac Order Form	4.1
JobTrac Order Detail	4.4
JobTrac Daily Production.....	

JobTrac Order Form

The JobTrac Order Form can be accessed from the Main Menu screen by selecting "JobTrac" and then "Orders", or by selecting **Keyboard Shortcut: "Ctrl-O"**



The JobTrac Order screen is the heart of this application. All information pertaining to the customer sales order is entered and maintained on this screen. The top portion of this screen will be referred to as the Header. The Header holds the general customer order information described below.



The screenshot shows the JobTrac Orders form. A red bracket on the left side of the form highlights the top section, which is labeled "Order Header". This section contains various input fields for order information:

- Order #: 48940
- Date Ordered: 11/09/2004
- Date Need: -
- Placed By: -
- Received By: -
- Cust. No.: -
- Customer: -
- Address: -
- City, State, Zip: - - -
- Job_Name: -
- Status: ON ORDER
- PO No.: -
- Trade Disc.: 0.00
- Destin: -
- County: -
- Cash:
- Dealer:
- Tax Exempt:
- Driver: 0.0000
- Tax Rate: 0.0000

Below the header is a table with columns: Product ID, Qty, Unit Price, Qty In Unit, Total, Taxable, Discount, and Description. The table is currently empty. At the bottom of the form, there are summary fields: Discount: \$0.0000, Tax: \$0.0000, SubTotal: \$0.0000, and Grand Total: \$0.0000. The ID number 041030 is visible in the bottom left corner.



Order # is automatically assigned by JobTrac. The numbers run sequentially and are determined by the data entered in the “next event” table on the System Information screen. Refer to Chapter 3, page 3.4 for details.

Date Ordered: The date the order is placed. The date can be entered by using the number keypad on the keyboard, or by double clicking on the field to display a calendar.

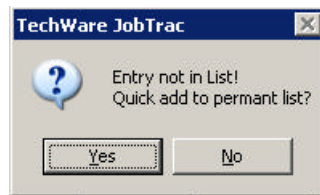
Date Need: The date the order is due to the customer. The date can be entered by using the number keypad on the keyboard, or by double clicking on the field to display a calendar.

Placed By: Person placing the order. Use drop down list for easy selection. Refer to Chapter 2, page 2.4 for Drop down list navigation.

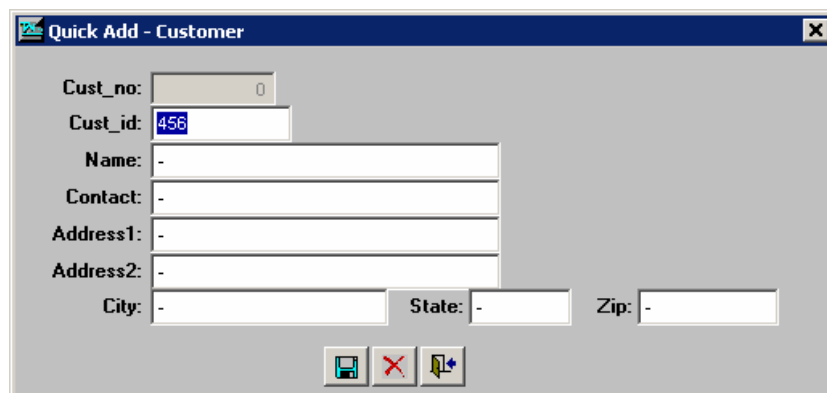
Received By: Person placing the order. Use drop down list for easy selection. Refer to Chapter 2 for Drop down list navigation.

Cust. No: The customer’s unique number. The drop down list can be used for easy selection. Refer to Chapter 2, page 2.4 for Drop down list navigation. A new customer number can be added through the “Quick Add” method:

- 1) Click on the Cust No field.
- 2) Key in the new customer number
- 3) The following screen will be displayed:



- 4) Click on Yes
- 5) Enter new customer information into the quick add screen.



- 6) Click on the Save icon.

This effective manner of permanently adding new customers to JobTrac saves time and costly mistakes.



Header fields continued:

Customer: This field is directly associated with the customer number selected in the Cust. No. field.

Address: This field is directly associated with the customer number selected in the Cust. No. field

City, State, Zip: This field is directly associated with the customer number selected in the Cust. No. field

Job Name: Many times a job name is associated with the customer order and is necessary for tracking the shipment. Enter unique job name in this field.

Status: Status of order. This is a read only field. JobTrac assigns one of three types: ON ORDER, PARTIALLY SHIPPED and COMPLETE.

PO No: Used for entry of customer purchase order number.

Trade Disc: Check if trade discount is allowed

Cash: Check if cash order.

Dealer:

Tax Exempt: Check if customer is tax exempt.

Destin: Enter the city where delivery is to be made. Use drop down list for easy selection. Refer to Chapter 2, page 2.4 for Drop down list navigation.

County: The county of the destination location. Use drop down list for easy selection. Refer to Chapter 2, page 2.4 for Drop down list navigation.

Driver: The drivers haul rate.

Tax Rate: The customer's sales tax rate.

Employee/Rate Table: Information displayed in this table refers to the salesman associated with the customer order.



Order Detail

The bottom portion of the Order Screen holds the detailed information regarding the order. This portion of the screen will be referred to as the Order Detail section. The order detail section is broken down into three parts: ITEMS, DIRECTIONS/NOTES, and SHIPPING RECORD. Each part can be accessed by clicking on the top of the tab.

Order Detail

JobTrac Orders

Order #: 48940

Date Ordered: 11/09/2004

Date Need: -

Placed By: -

Received By: -

Cust. No.: -

Customer: -

Address: -

City, State, Zip: - - -

Job Name: -

Status: ON ORDER

PO No.: -

Trade Disc.: 0.00

Destin: -

County: -

Driver: 0.0000

Tax Rate: 0.0000

Employee Rate

Items Directions / Notes Shipping Record

Product ID	Qty	Unit Price	Qty In Unit	Total	Taxable	Discount	Description

Discount: \$0.0000 Tax: \$0.0000 SubTotal: \$0.0000 Grand Total: \$0.0000

041030

The “ITEMS” tab:

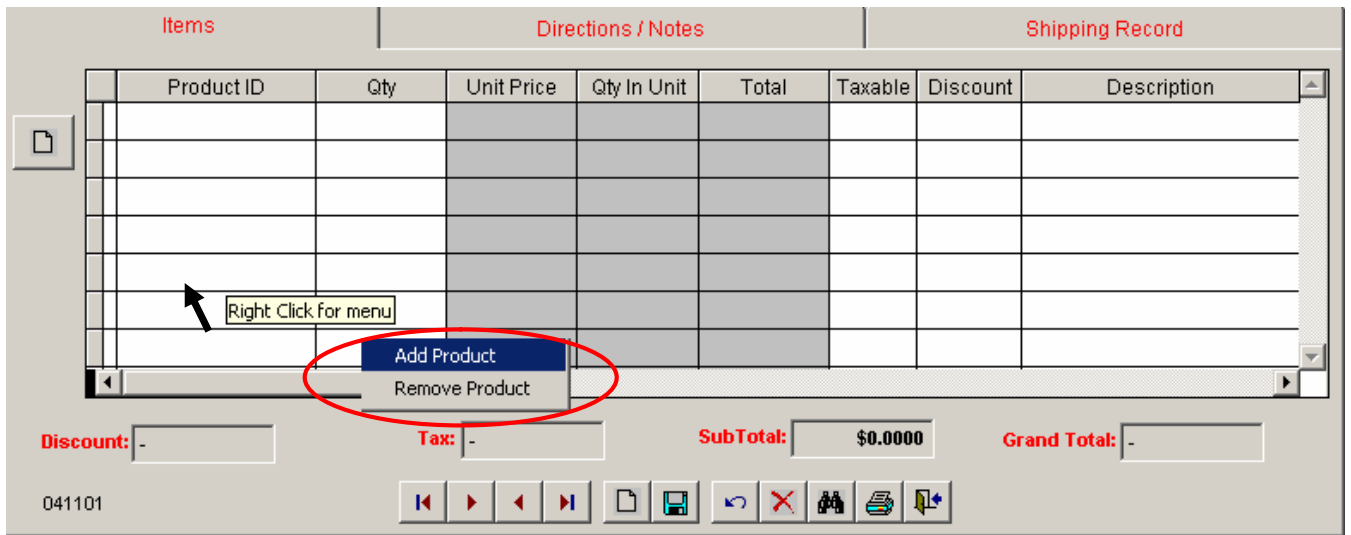
This section is used to enter the individual items ordered by the customer. An item can be added by either selecting the *new item* icon, located at the right of the item grid,

Items

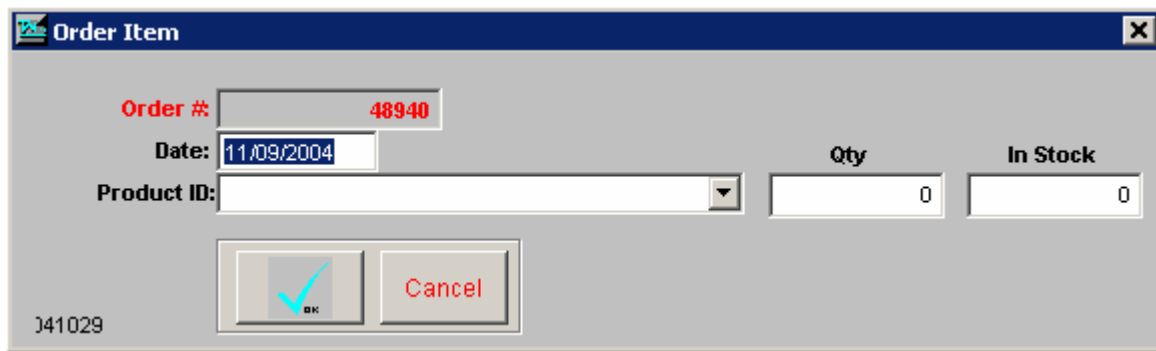
Product ID	Qty	Unit Price	Qty In Unit	Total	Taxable	Discount	Description



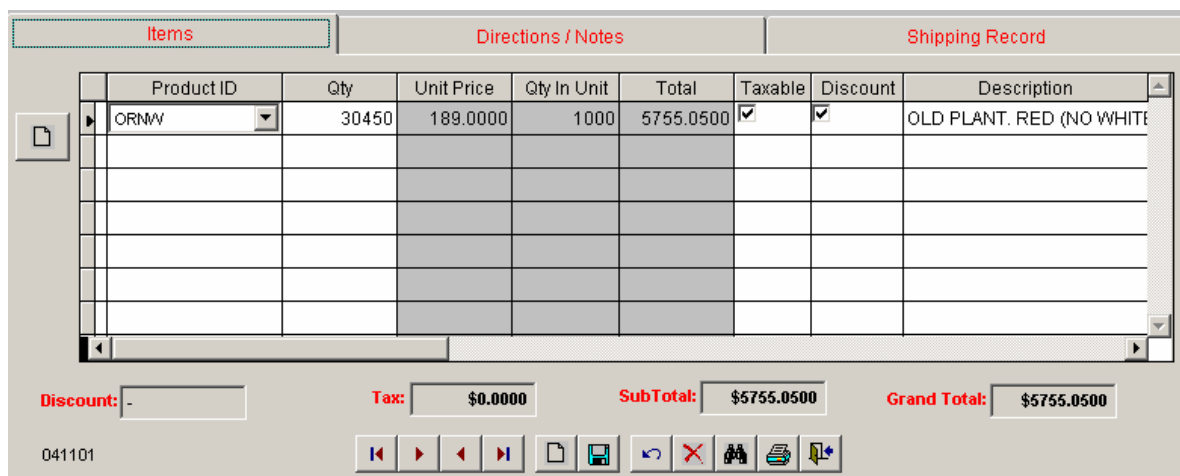
Or, by placing the cursor over the item grid and right clicking on the mouse. A menu will display prompting you to “Add Product” or “Remove Product”. Select Add Product.



Both methods will display the following entry screen:

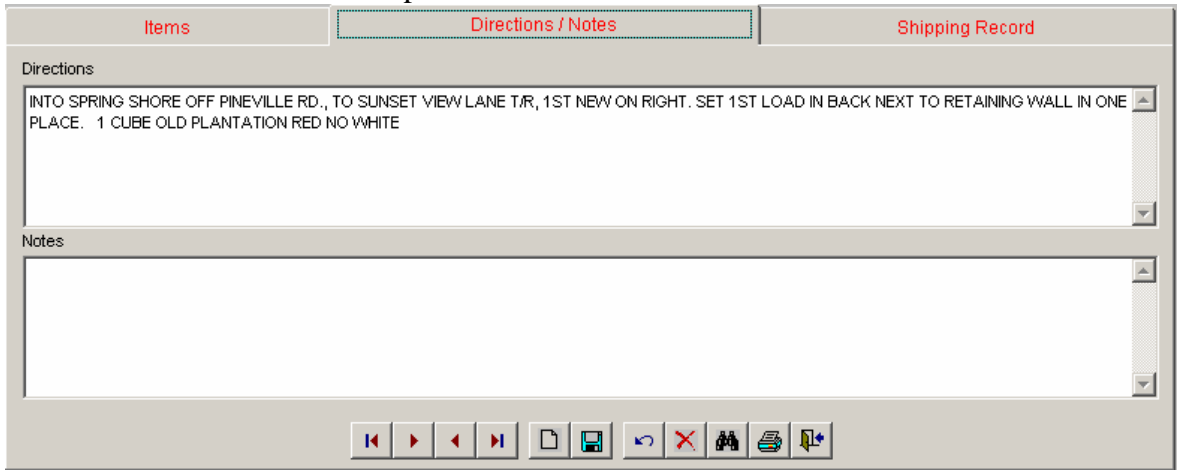


Using the Product ID drop down list, select the product you want to add to the order. Enter the quantity and click on the checkmark icon. Repeat this process for each item ordered. Our example shows only one item on the order. All information associated with the Product ID will be displayed. JobTrac automatically calculates discount amounts and tax information.



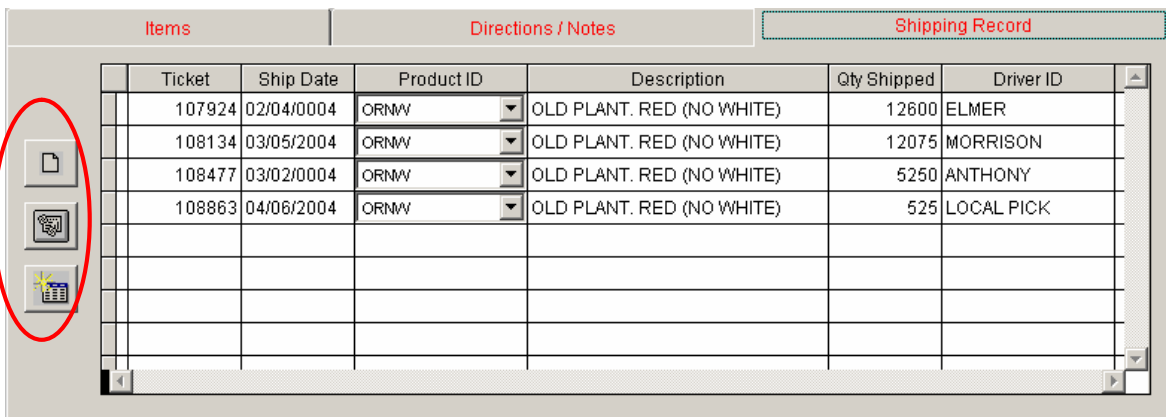
The “DIRECTIONS/NOTES” tab:

This tabbed section can be used for specific directions or notes associated with the order. The directions and notes are order specific.



The “SHIPPING RECORD” tab:

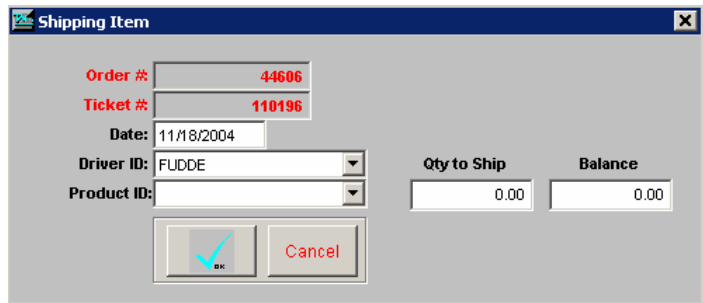
This tabbed section is used to record all shipments against a specific order.



The Icons at the left of the shipping record grid are used to enter or review shipping information.

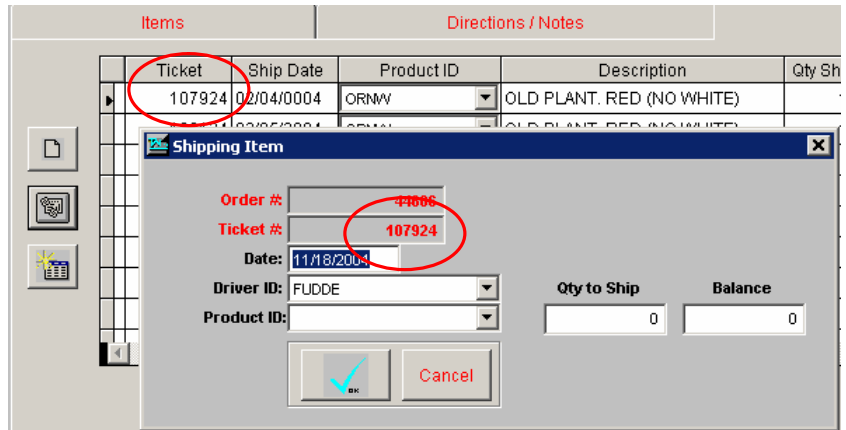


By selecting this icon, a new shipping ticket will be created and added to the shipping record screen. This screen allows the user to select the product ID from a drop down menu. Only items placed on the order will be displayed for shipment.





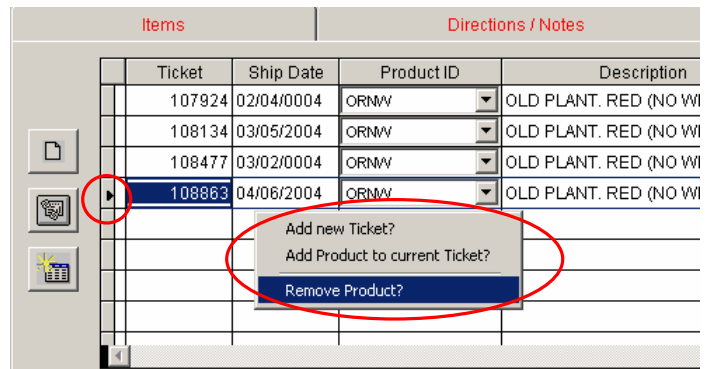
By selecting this icon, the quantity can be changed on an **existing** shipping ticket. Simply select the product and enter the correct shipping quantity.



By selecting this icon, a pop up screen will display the shipping status of this order.

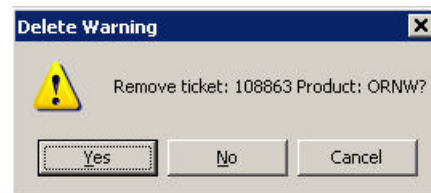
Product ID	Qty Ordered	Qty Shipped	Balance
ORNW	30450	30450	0

To remove a product from the Shipping Record screen, simply click on the line in question. A small black arrow on the left of the grid will indicate your choice. Right click on the mouse for the pop up menu box and select **Remove Products?**



JobTrac will request a confirmation of this action by displaying the following:

Choose **Yes** to confirm and delete, **No** to leave item as is, or **Cancel** to ignore the delete request.



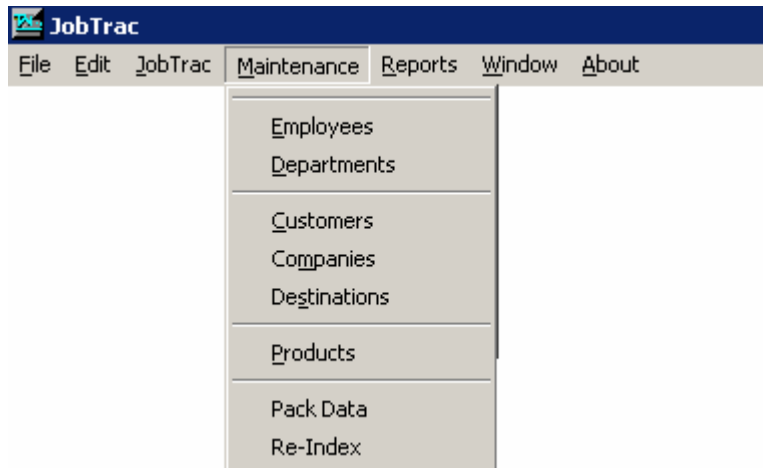
Chapter 5

Maintenance

Maintenance - File Functions and Operation.....	5.1
Maintenance – Editing Project Information.....	5.9
Import Data / Limit Definitions / Test Definitions	5.11
Importing Files / Re-index Files / Pack Data.....	5.13

Maintenance - File Functions

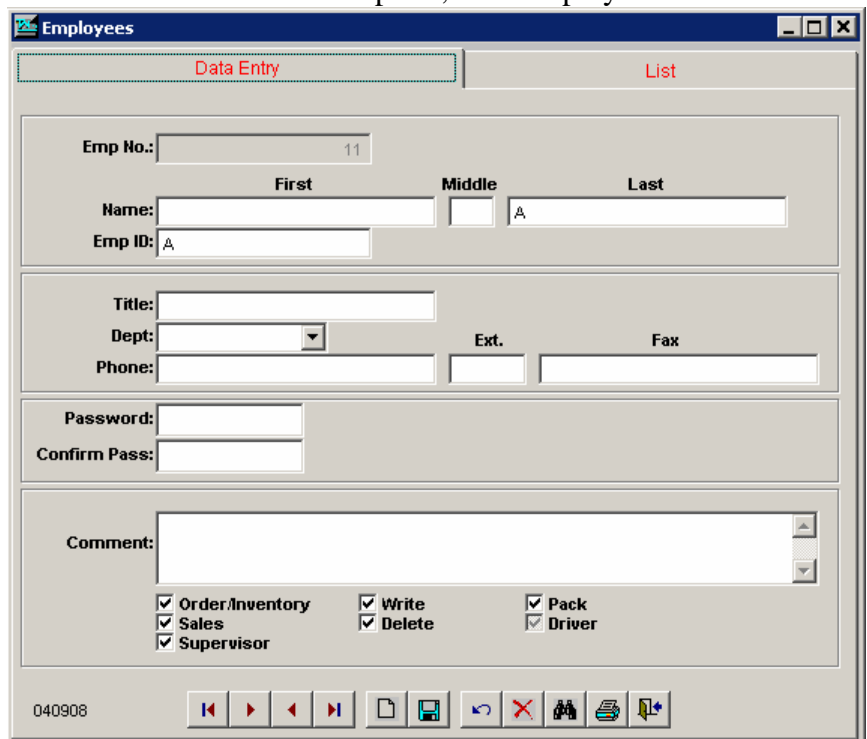
Maintenance can be accessed from the Main Menu screen by pressing **Alt-M** or by selecting **Maintenance** from the JobTrac Menu bar.



Employees

One item in the **Maintenance** menu is **Employees**. A clip of this screen is to the right. This is a detailed account of all the people associated with JobTrac. At this point, each employee that needs access to JobTrac is entered into the system. **First** and **Last** name as well as **Employee ID** (Emp ID) are the *main* items. Employee ID is used throughout JobTrac in the drop down lists. Employees can be assigned to specific Departments as well. This allows the user to track Sales dollars, Driver rates, etc.

The Employee password is an alpha-numeric field. It can be changed at any time. Once the Employee is entered, certain "rights" need to be assigned to that individual. If just the Order/Inventory or Sales boxes are checked, the user will have "read only" privileges, and will be capable of doing inquires only. If the **Write** box is checked in



conjunction with the Order Inventory and Sales boxes, the user will be able to add data or make changes to existing data. **Delete**, will allow users to mark areas to be deleted. Finally, the **Pack**, allows the user to physically remove the “deleted” marked areas. **Supervisor** - only employees with supervisor rights can change certain data.

Customers

The Customer file is used to create a master directory of all customers that are commonly used in JobTrac. Information for each Customer can be kept for future reference.

This file holds important billing information regarding discounts, taxes and sales territory.

The screenshot shows the 'Customers' window in JobTrac, currently in 'Data Entry' mode. The form contains the following fields and values:

- Cust_no: 352
- Name: MASON BLACK & SONS
- Cust_id: 801
- Contact: MASON BLACK
- Address1: 1234 ABC STREET
- Address2: (empty)
- City: MOORESVILLE
- State: NC
- Zip: 12345
- Phone: (704)123-4567
- Mobile: (704)891-1234
- Fax: (704)567-8910
- Email: b&son@mason.org
- Tax Exempt:
- Dealer:
- Tdiscount: \$0.00
- Salesarea: 0
- Comment: This is a sample customer only. Used for demonstration purposes.

At the bottom of the window, there is a toolbar with navigation and action icons, and the number '041024' is visible in the bottom-left corner.

Departments

The different **Departments** that are associated with each employee can be kept in JobTrac. Most of these screens have an Abbreviation. The drop down lists commonly found throughout JobTrac use these Abbreviations.

The screenshot shows the 'Departments' window in JobTrac, currently in 'Data Entry' mode. The form contains the following fields and values:

- Dept: SALES STAFF
- Abbrev: SALES
- Dept_No: 2
- Comment: (empty)

At the bottom of the window, there is a toolbar with navigation and action icons, and the number '040712' is visible in the bottom-left corner.



Companies

The Companies file can be used to hold information regarding all locations of the parent company, such as different plants or partners.

The screenshot shows the 'Products' window with a 'Data Entry' tab. The fields are as follows:

Prod_no:	302
Product:	WIDGET
Prod_id:	WIDGET
Class:	SPEC
Supplier:	
On Order:	4000
Instock:	1000
Reorder Level:	1000
Unit Image:	C:\DOCUMENTS AND SETTINGS\...
Equifac:	1.00
Unit Price:	\$0.00
Unit Cost:	\$500.00
Qtyinunit:	1000
Active:	<input checked="" type="checkbox"/>
Apply Discount:	<input checked="" type="checkbox"/>
Taxable:	<input checked="" type="checkbox"/>

Destinations

This file is the master file for County tax, sales territory, delivery rate information and sales person. When a new sales order is entered, data from this file can be found in the header.

The screenshot shows the 'Destinations' window with a 'Data Entry' tab. The fields are as follows:

Destin No:	87
Destination:	HIGH POINT
County:	GUILFORD
Delivery Rate:	\$7.60
Tax Rate:	\$7.00
Sales Person:	RANKINS
Zone:	-

Products

This file holds details regarding individual products.



Prod_no: This value is automatically determined by JobTrac. The numbers run sequentially and are determined by the data entered in the “next event” table on the System Information screen. *Refer to Chapter 3, page 3.4 for details.*

Product: The description of the product

Prod_id: This is the unique number or identifier for the product. Some common terms are: part number, item number.

Class: This field can be used to sort your product. Common terms are also Category or

Supplier:

Equivfac:

Unit Price:

Unit Cost:

Qtyinunit: Some items or products are priced by the tens, hundreds or thousands. This example shows that the products unit cost is \$500.00 per 1000 pieces ordered.

On order: Shows the quantity of item on order.

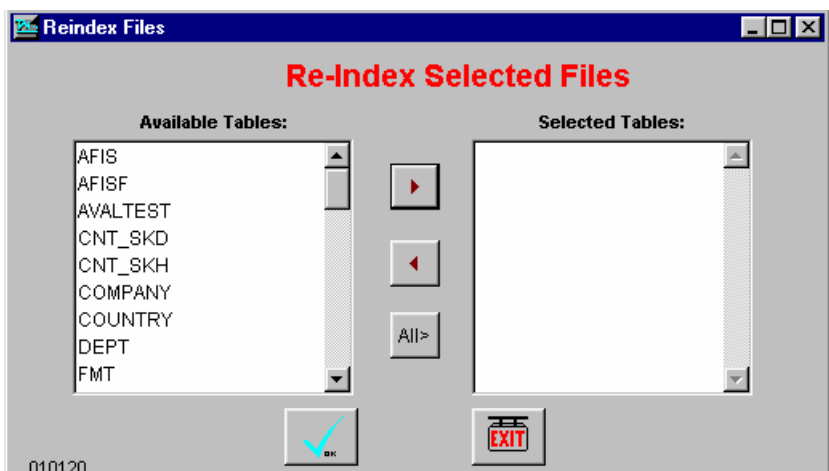
InStock: Shows the quantity of item in stock.

Reorder Level: Shows the reorder quantity of the item. When the In Stock value reaches this quantity, the item must be reordered.

Unit Image: This allows the user to browse the system for an image file of the product. Once the correct file path is located, the image will be displayed.

Re-Index

From time to time, databases within the JobTrac program can become out of synchronization with the index files. Indexes are used extensively with JobTrac to help speed up certain processes. Certain environmental factors such as power outages or power surges can cause this to happen. For this reason, users should **Re-Index** occasionally



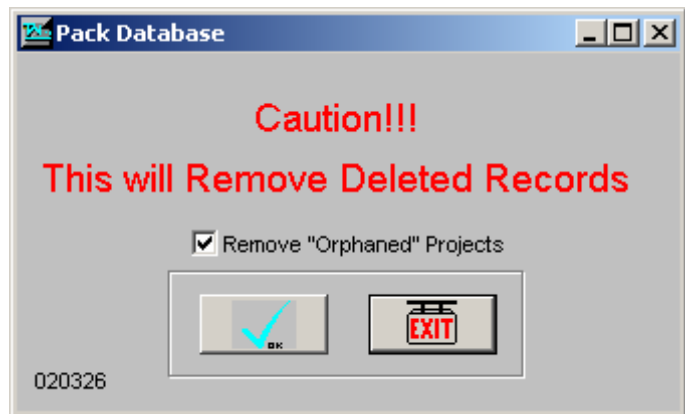
or if the Controls do not seem to operate correctly.

Note: *Re-Index* can only be modified with a supervisor's access. If you attempt to access this area without the appropriate authorization, you will receive an error "*You are not logged in as a Supervisor.*" You are given a prompt to either retry or cancel the request.

Pack Database

As mentioned earlier in this manual, data in JobTrac is not really deleted until it is **packed**. This means that until you perform a **Pack Database** on a data file, deleted data can be recalled.

For this reason, use **EXTREME** caution with this feature. Over time, you may wish to delete files if space is a concern. Otherwise, we would suggest keeping all data.



The "*Remove Orphaned Orders*" box in the **Pack Database** function is needed when a user deletes an order. The JobTrac order is deleted, but not the data records associated with it. JobTrac looks at these records as "orphans". By checking this box, the records related to the deleted order will be removed from JobTrac. **Note:** Pack Database and Re-Indexing JobTrac files require exclusive rights and can be accessed by only one user.



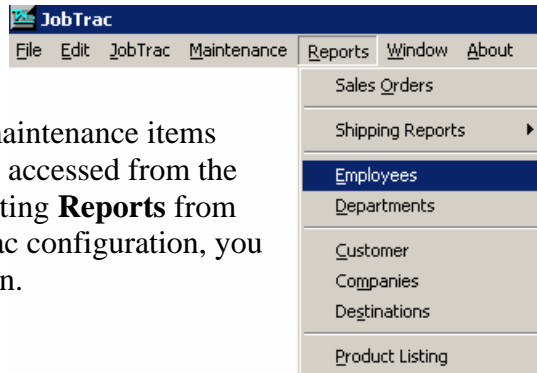
Chapter 6

Reports

General Reports.....	6.1
Shipping Documents.....	6.3

Reports General

General reports containing information regarding maintenance items such as Products, Employees and Customers can be accessed from the Main Menu screen by pressing "Alt-R" or by selecting **Reports** from the JobTrac Menu bar. Depending on your JobTrac configuration, you may not see all the reports represented on this screen.

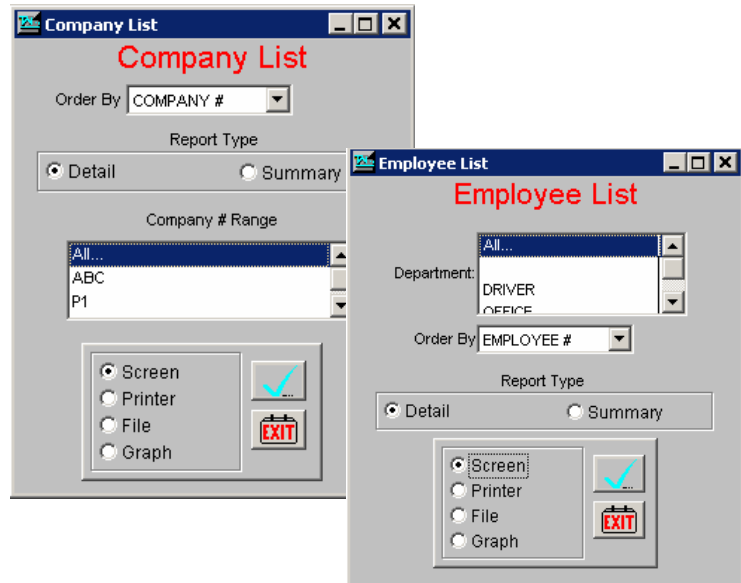


Employee & Company Lists

Both of these reports are similar in structure and can accept a range of employees or companies to report on. Both reports can be requested as Detail or Summary.

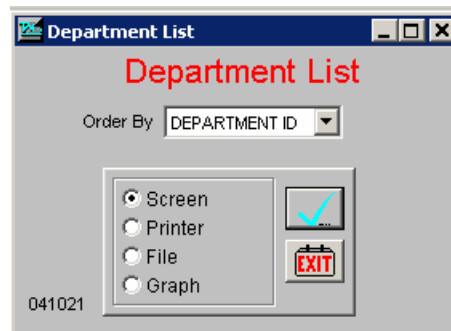
The Employee List will sort information by Name, Employee Number or by Department.

The Company List will sort information by Company Name, or Company Number.



Department List

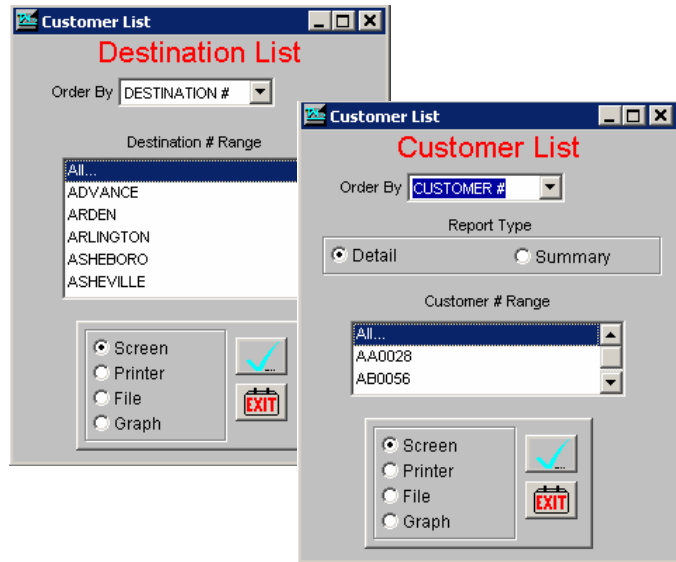
This report provides a list of all Company departments. It can be sorted by either department ID, or department. Drop down lists associated with JobTrac reports make selection quick and easy.



Customer & Destination Lists

These reports provide a summary or detail list of all customers and destinations within the JobTrac database.

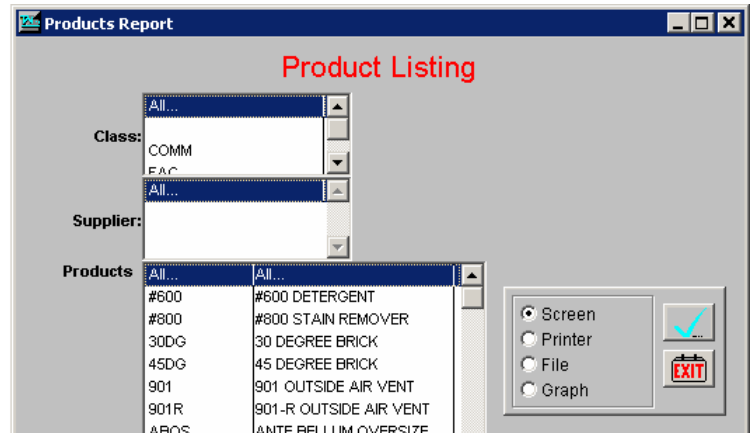
Both can be sorted by customer/destination number or customer/destination name. Users can select an individual number, a range of numbers or the entire list. As with all JobTrac reports, information can be sent to the Screen for preview, the Printer, or formatted and exported to another file.



Product Listing

This report contains information regarding all products listed in JobTrac. Product price, inventory levels, reorder levels etc are found on this report.

The product listing report can be selected by Class, or a range of product numbers.



Sales Order Screen

The Sales Order screen is the vehicle that generates a hard (paper) copy of the sales order. Orders can be selected by individual order number, or by keying in a specific start date.

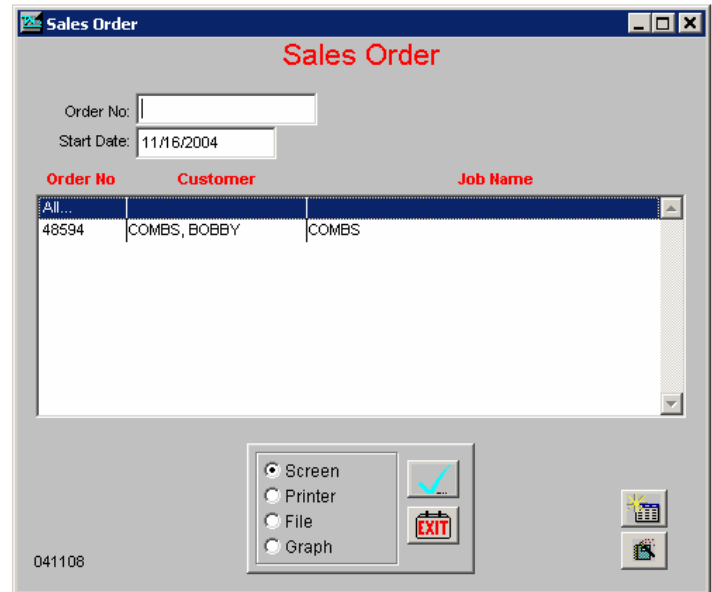
Sales orders can be configured to print on different sized forms by selecting the icons on the bottom of the Sales Order screen.



Allows the user to change the print format and positions of character placement on the sales order form.



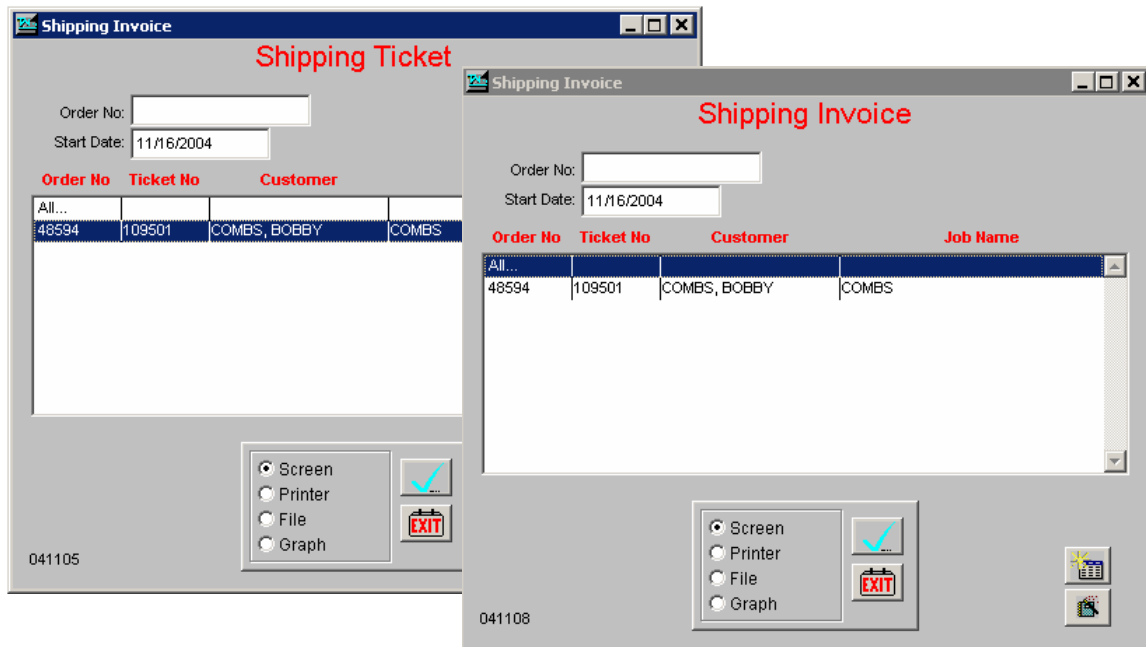
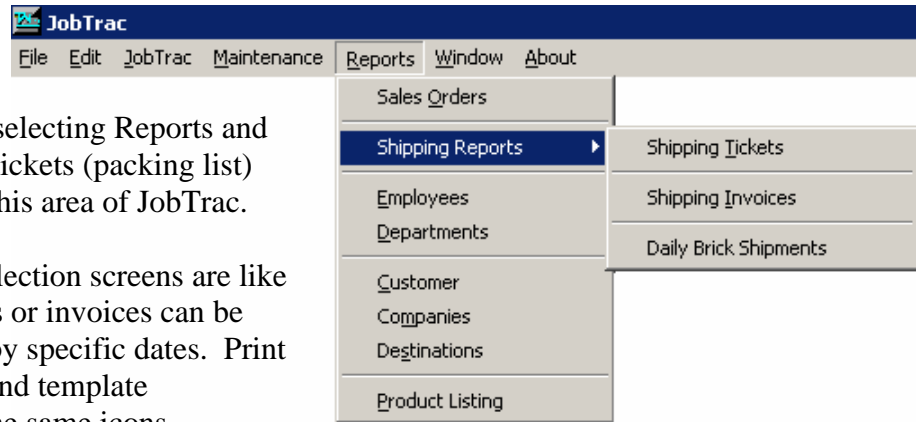
Allows the user to modify report templates.



Shipping Reports

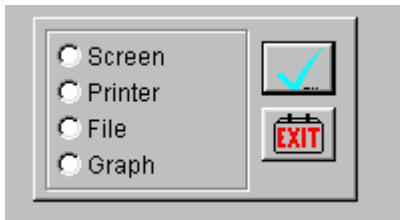
Shipping documentation can be accessed from the Main Menu by selecting Reports and then Shipping Reports. Shipping tickets (packing list) and Invoices can be printed from this area of JobTrac.

The shipping ticket and invoice selection screens are like the Sales Order screen. Shipments or invoices can be selected by individual number or by specific dates. Print configuration for different forms and template modification can be accessed by the same icons.



Output Device

Once you have entered your criteria into the report screen, you can select the Output Device. You can choose to report your information to the Screen, Printer, File, or a Graph.



Screen: Requested information will be displayed on screen.

Printer: Requested information will be sent to default printer. If “prompt for printer” option in “system set-up” is checked, the user can select printer.

File: Requested information can be sent to different file formats. Detail to follow

Graph: Requested information will be set in a graph format. Detail to follow. *Note: This is an optional feature. Contact TechWare for additional information.*



Output to *File*:

The clip to the right is the prompt that will appear in JobTrac. The user must select the file format:

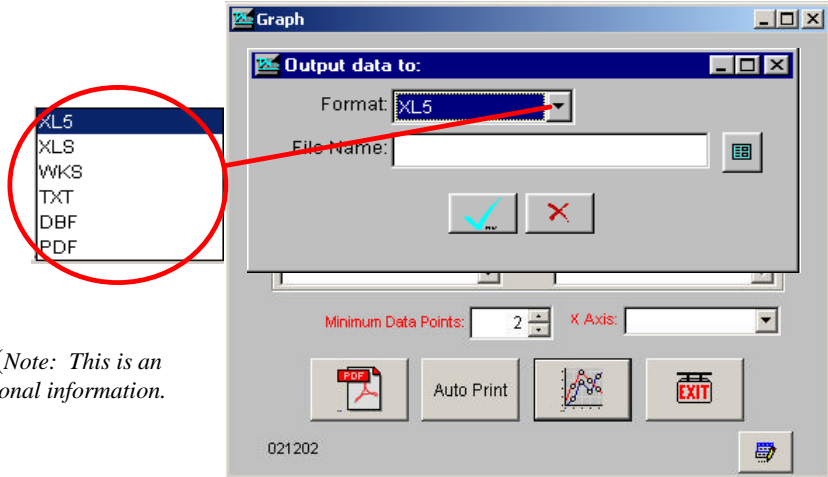
Excel: XL5, XLS

Text: TXT

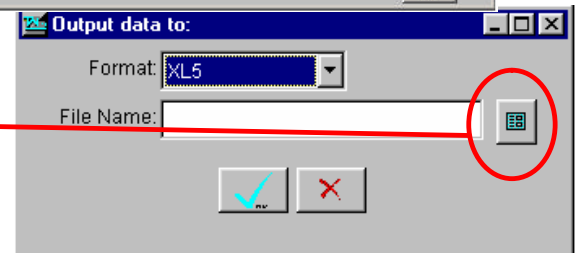
Database: DBF

Lotus: WKS

Portable Document Format: PDF (Note: This is an optional feature. Contact TechWare for additional information.)





The user must name the file. Unless otherwise specified, this file will automatically be sent to the JobTrac directory. To choose a different directory, click on the Browse button



Next, click your mouse on the checkmark icon; JobTrac will process your request in minutes.

Output to *Graph*:

The clip below shows the multiple graph screen displayed in JobTrac when *Graph* is selected as the output. The user can choose from 1-6 properties from the *Available Properties* list to display. Clicking on the desired property, then clicking on the “add” arrow icon  can select these properties. This action places the property in the *Selected Property* column. To remove a property from the *Selected Property* column, click on the property to be removed and then click on the “remove” arrow icon .

Note: Each property will be individually graphed.

Other features of the MultiGraph screen are:

Minimum Data Points: *The minimum points to display on the graph.*

X Axis: Properties chosen for the X Axis on the graph.



: Create PDF files. (optional feature)



: Send graphs directly to printer without preview.



: Preview graph on screen.



: Use to edit *Available Properties* list and X Axis selection.

