PowerTrax® Pro

Administrator's Guide

Version 2.01

Results Through Focused Technology...

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Published World-Wide by Soft Solutions, Inc.

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2900 Chamblee Tucker Road
Building 12, Suite 200
Atlanta, GA 30341 USA

Results Through Focused Technology...

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Overview

In this chapter:

Introduction

This chapter provides an overview of the responsibilities of the PowerTrax Pro Administrator. Each area of administration is discussed briefly and references are given to more detailed information found in later chapters of this manual.

Who is the Administrator?

PowerTrax Pro is designed specifically for the manufacturer's rep industry. While the features and functionality of PowerTrax Pro are applicable to all rep agencies, there are certain parts of the application that must be customized for the unique needs of your organization. This includes adding user information for the people who belong to your company, specifying your company information (addresses, phone numbers, logos), and configuring your own custom numbering system for quotes and orders. The *Administrator* is the person in your organization who is responsible for setting up and maintaining this unique information.

Security Precautions

The designated Administrator for your company has access to all areas of the PowerTrax Pro database. This includes the ability to add, delete or edit vital database information such as passwords and commission rates for sales reps. As a security measure, we recommend that you designate only one Administrator and one backup Administrator for your company. Giving Administrator access to a larger number users can leave your database open to accidental or malicious tampering.

The Administrator Login

In order to access the administrative areas of PowerTrax Pro, the Administrator must log in to PowerTrax Pro using the 'Administrator' user name and a special Administrator password.

1. Launch the PowerTrax Pro application. After a few seconds, the Password dialog appears.

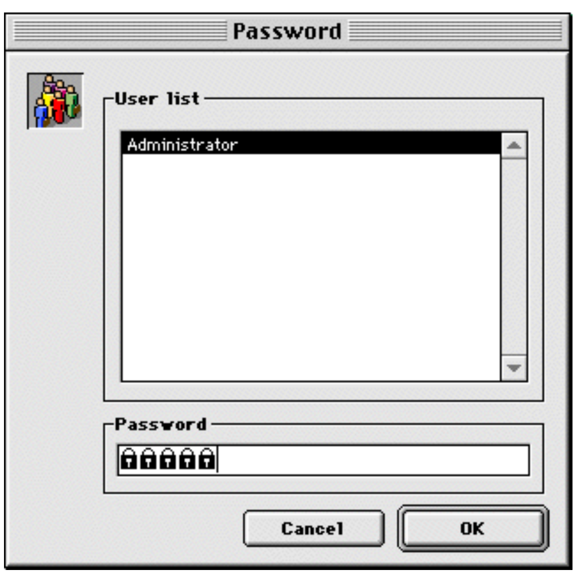


Figure 1-1: Logging in as the Administrator

2. Select ‘Administrator’ from the list of users, then press the Tab key on your keyboard to highlight the ‘Password’ field.
3. Enter the administrator password, then click ‘OK.’

You are now logged in as the Administrator and have access to all areas of the PowerTrax Pro database. In particular, you have access to the Administration dialog which in turn allows you to access the controls for performing various administrative tasks.

Figure 1-2: Administration Dialog

You can display the Administration dialog at any time by choosing **File > Administration** from the main PowerTrax Pro menu bar.

Note If you are not logged into PowerTrax Pro as the Administrator, the Administration dialog will be unavailable.

The Administration dialog is discussed in detail in later chapters of this manual.

Overview of Administrative Tasks

There are a variety of tasks that can be performed by the PowerTrax Pro Administrator. Some tasks are mandatory and must be completed in order for PowerTrax Pro to function properly. Other tasks are optional but can be useful for customizing PowerTrax Pro for your organization.

Mandatory Administrative Tasks

The following tasks must be performed by the Administrator in order for PowerTrax Pro to function properly:

- Adding users and setting access privileges
- Creating sales teams
- Specifying rep firm information (addresses, phones, logos)
- Configuring a unique numbering system for quotes and orders.

Adding Users and Setting Access Privileges

In PowerTrax Pro, any person who has access to the database is referred to as a "User." The users in your organization must be added to the database by the Administrator. Users are given a user name and password, and are assigned access privileges that specify the type of tasks they can perform in the database. For example, one user might be able to add and delete information, while another user might only be allowed to view the information. See Chapter 2, for a complete description of how to add users to your PowerTrax Pro database.

Creating Sales Teams

PowerTrax Pro uses the concept of sales teams in order to track commissions. A sales team consists of one or more users. Each member of the team is assigned a specific 'cut' of the team's commission. For example, if a team has three members, each member might get 10 percent of the total commission. Using this example, a 100 dollar commission would be divided as follows:

Member 1	$10
Member 2 --	$10
Member 3 --	$10
Company --	$70
Total	$100

The Administrator is responsible for creating the teams, adding and deleting team members, and specifying each member's commission split. See Chapter 3 for an explanation of how to create sales teams for your organization.

Specifying Rep Firm Information

Rep firm information refers to your company's name, addresses, phone numbers, logo, and so on. It's the Administrator's job to add this information to the database so that will appear on your printed quotes and orders. See Chapter 4 for detailed instructions on how to specify your rep firm information.

Custom Numbering

In business, it's important that forms such as quotes, orders, invoices and purchase orders be numbered uniquely for identification purposes. The Administrator can configure custom numbering system for your transaction forms. See Chapter 4 for information on configuring your custom numbering system.

Optional Administrative Tasks

In addition to the mandatory administrative tasks, there are a number of miscellaneous tasks that the Administrator can perform. The following tasks help to customize PowerTrax Pro for your company's needs, but are not necessary for PowerTrax Pro to function:

- Creating custom display and print formats for your quotes, orders and reports
- Configuring custom database fields to hold information that is unique to your organization
- Editing and maintaining choice lists for certain fields in the database
- Importing and Exporting Data

Display and Print Formats

The Administrator has the ability to customize the information that appears on your quotes, orders, invoices and purchase orders. For example, you might have a quote form that shows your company's commission for the sale. Obviously you wouldn't want that information to appear on the printed quote that you send to a customer, so the Administrator can create a custom print format where the commission is not visible. That way, you can have an 'on-screen' form that shows your commission and a printed form that hides the commission.

The Administrator is also able to specify custom formats for any reports that you generate from PowerTrax Pro. See Chapter 5 for complete details of how to create custom formats.

Custom Fields

The Contacts input form in PowerTrax Pro contains data entry fields that hold information commonly used by most businesses. However, each business is different and it's possible that your organization might want to store information that's unique to your needs. Perhaps you want to store data on whether a customer prefers to be contacted by phone, fax, or email. To accommodate this type of situation, the Contacts input form comes with 18 fields that the database Administrator can configure to hold unique data. See Chapter 6 for information on setting up custom fields.

List Management

Throughout the PowerTrax Pro database, you'll see many fields with a small triangle beside them. This triangle indicates that the field has a choice list associated with it.

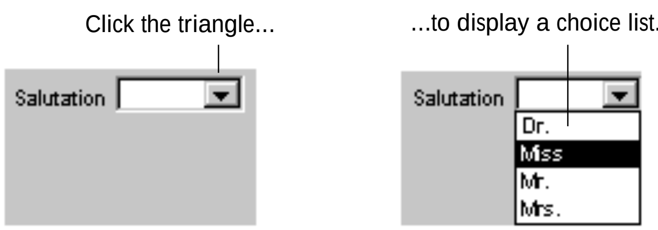


Figure 1-3: Choice Lists

A choice list allows the user to fill in a field by selecting a choice rather than typing an entry each time. For example, the 'Salutation' field on the Contacts input form is always filled in with 'Dr.' 'Mr.' 'Mrs.' or 'Miss'. Rather than have the user type one of these values each time, PowerTrax provides that field with a choice list containing the three values. The user can quickly select a choice from the list instead of typing.

The choice lists in PowerTrax Pro contain default choices that are commonly used by most businesses. However, because each business is different, the Administrator can edit the items in any choice list to better reflect an organization's needs. For example, the choice list for the 'Salutation' field could be changed to the items 'Dr.' 'Mr.,' 'Mrs.' and 'Ms.' See Chapter 7 for details about list management.

Importing and Exporting Data

To avoid tedious and error-prone rekeying of data, PowerTrax Pro provides import and export features that allow you to move data into—and out of—your database quickly and efficiently in the form of delimited text files. See Chapter 8 for details about importing and exporting data.

Maintenance Tasks

From time to time the Administrator will need to perform maintenance tasks that keep your PowerTrax Pro database up to date. For example, when you receive a new update to your PowerTrax Pro application, the Administrator needs to update the PowerTrax Pro search engine so that it will search any new fields or tables that might have been added to the new update. See Chapter 9 for a discussion of administrative maintenance tasks.

2

Adding Users

In this chapter:

This chapter shows you how to add new users to your PowerTrax Pro database. You'll also learn how to create user names and passwords, and how to set access privileges for each user.

Adding New Users

The first task involved in setting up your database is to create a user name and password for each person who will use the PowerTrax Pro application.

1. After logging in as the Administrator, choose **File > Administration** from the menu bar. The Administration dialog appears showing a list of Administration areas.

Figure 2-1: Administration Areas

2. Select 'Password Editor' from the list, then click 'OK.' The Password Editor window appears.

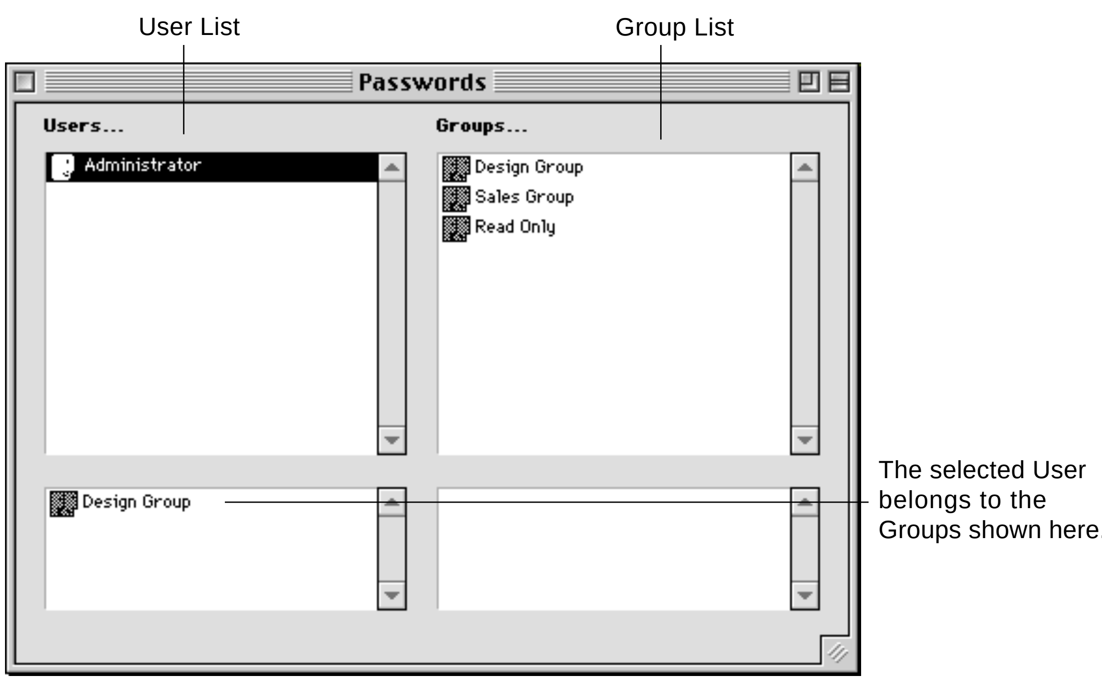


Figure 2-2: The Password Editor

The Password Editor window contains four scrolling lists that give information about the Users and Groups in your PowerTrax Pro database. A *User* is a person who is authorized by the Administrator to use the PowerTrax Pro application. A *Group* is a collection of one or more Users.

Each Group has specific access privileges that determine the kind of tasks the Users assigned to that Group can perform. See “Groups” later in this chapter for more information.

The lists on the left side of the Password Editor window show the names of the database Users and any Groups that they belong to. The lists on the right side of the window show the names of Groups and the names of any Users who are members of those Groups.

To add a new user:

1. Choose **Password > New User**. The User input form appears.

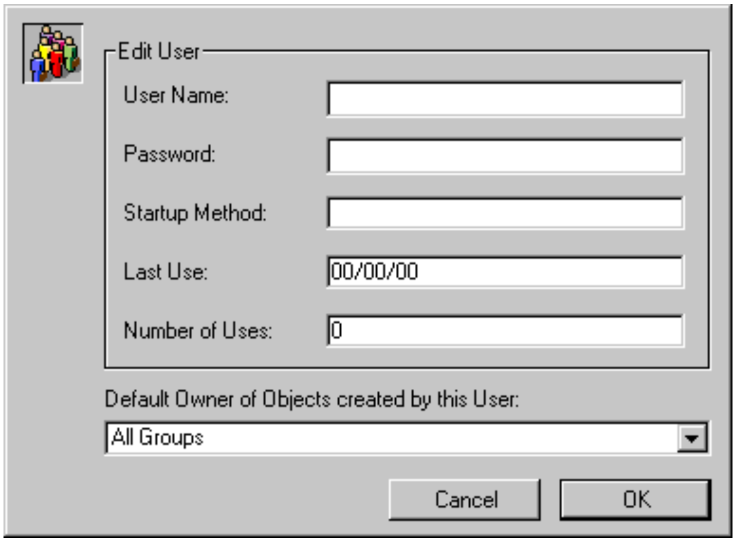


Figure 2-3: User Input Form

2. Enter the name of the new user in the ‘User Name’ field, then press Tab.

Figure 2-4: Entering a User Name

3. Enter a password for the new user in the ‘Password’ field.

Figure 2-5: Entering a User Password

Note Passwords are case sensitive. This means that upper and lower case letters are considered to be different. Be sure that the Caps Lock key on your keyboard is not on when you enter the password for the user.

4. Click ‘OK.’ The new user now appears in the User list on the Password Editor.

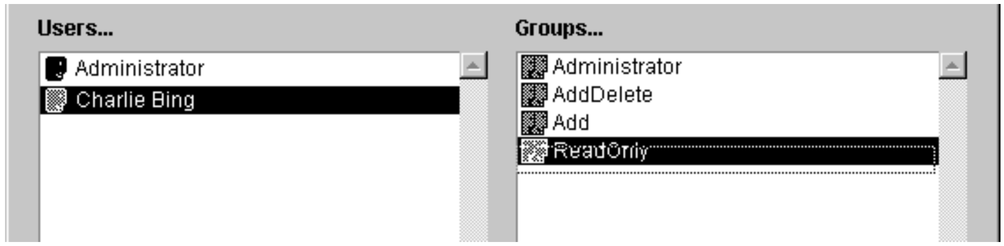


Figure 2-6: New User Added

Note Once you've added a new user with the Password Editor, you must open the PowerTrax Pro Users table and create a User record for that person. See "Creating a User Record" on page 8.

Groups

PowerTrax Pro comes with a set of predefined Groups that you can assign Users to. Each Group has specific access privileges that determine the kind of tasks the Group members can perform. For example, the 'Read Only' Group is configured to only allow 'Read' access. This means that any Users assigned to this Group can view, but not add or change data.

Assigning a User to a Group

1. Click the name of the User you want to assign, then hold down the mouse button and drag the User onto the Group you want to assign him or her to. When the Group becomes highlighted, release the mouse button.

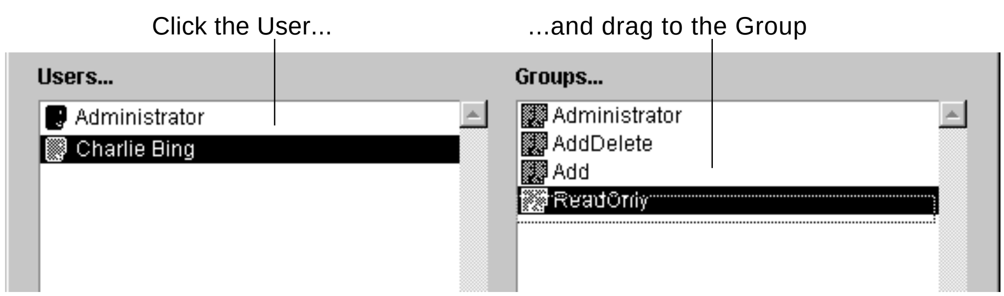


Figure 2-7: Assigning Users to Groups

The User becomes a member of the selected Group, and the User's name appears in the scrolling list below the list of Groups.

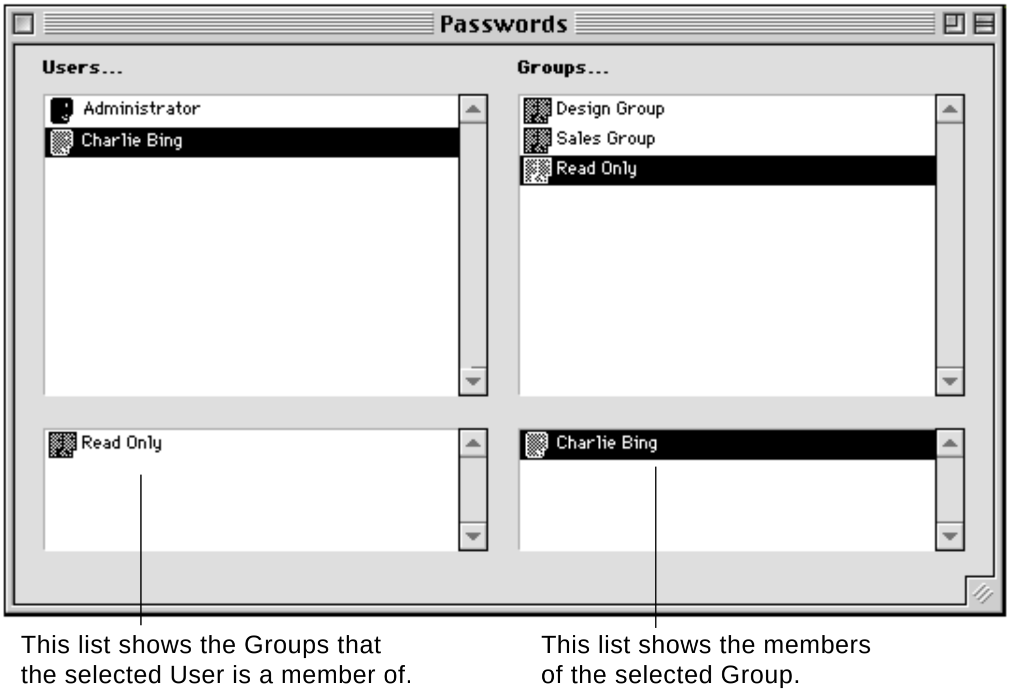


Figure 2-8: User Assigned to Group

To see which Group a User belongs to:

1. Click the User's name in the 'Users' list. The name of the User's assigned Group appears in the scrolling list below.

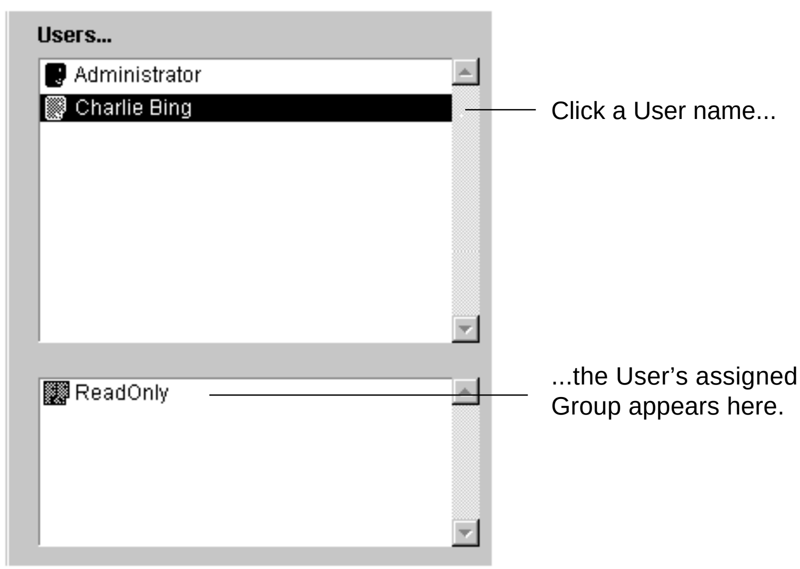


Figure 2-9: Viewing a User's Group

To see which Users are members of a particular Group:

1. Click the Group name in the ‘Groups’ list. The names of all assigned Group members appear in the scrolling list below.

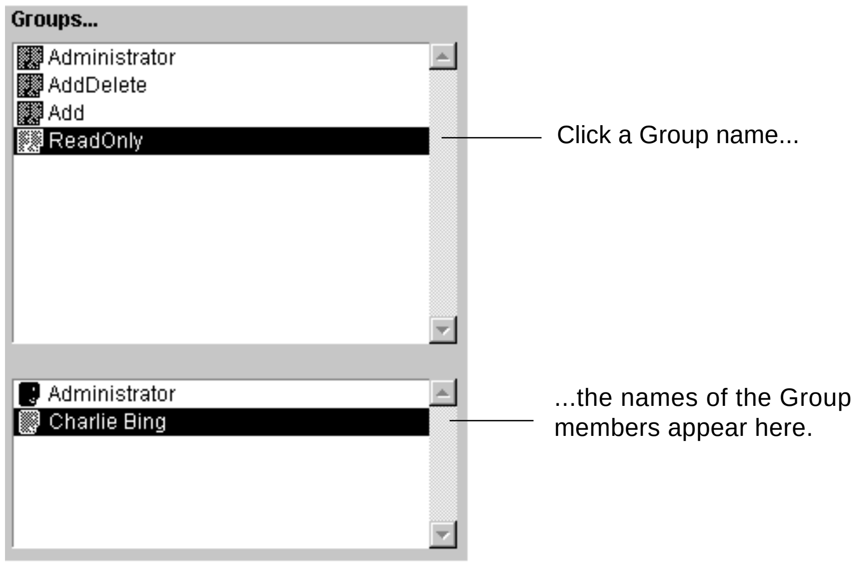


Figure 2-10: Showing Group Members

Removing a User From a Group

To remove a User from a Group:

1. Click Group name in the ‘Groups’ list. The names of all Group members appear below.

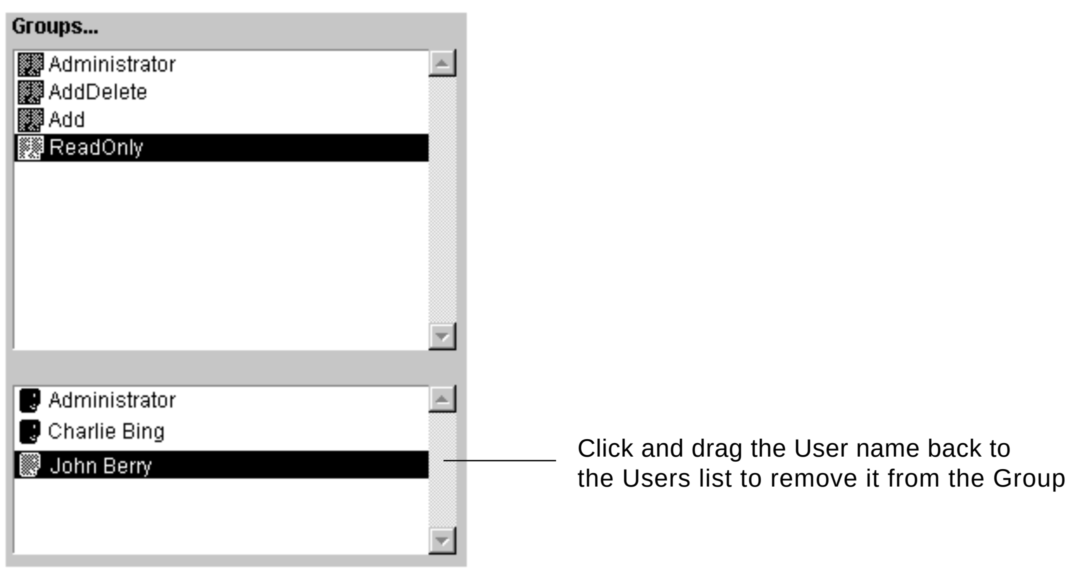


Figure 2-11: Removing a User from a Group

2. Click the name of the User you want to remove from the Group and drag it back to the ‘Users list on the Password Editor window. The User’s name no longer appears in the list of Group members.

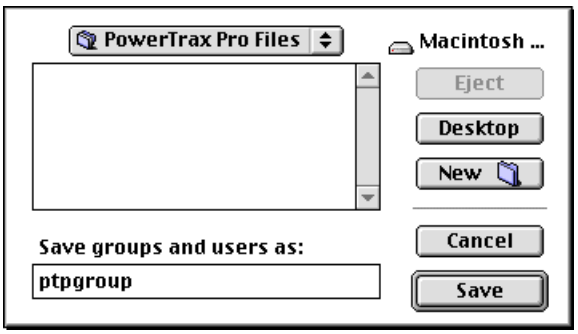
Saving Your Groups (Very Important!)

Anytime that you receive an update to your current PowerTrax Pro version, it's crucial that you save your current group configurations before updating. If you do not save your groups before installing a new update, the data describing which users are members of which groups will be lost, and group membership will have to be reconfigured.

Note You must be logged into PowerTrax Pro as the Administrator in order to save Groups.

To save your current Group configuration:

1. With the Password Editor open, choose **Passwords > Save Groups**. The standard Save dialog for your operating system appears.



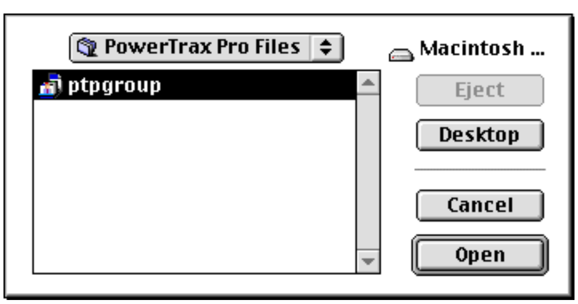
2. Enter a name for the Group file and select a location to store it.
3. Click 'Save.'

Loading a Saved Group File

After installing a new update of PowerTrax Pro, you'll need to load the Group file that you saved previously.

Note You must be logged into PowerTrax Pro as the Administrator in order to load Groups.

1. With the Password Editor open, choose **Passwords > Load Groups**. The standard Open dialog for your operating system appears.



2. Select the Group file that you want to load, then click 'Open.' PowerTrax Pro will load your file and restore the saved Group configuration.

Creating a User Record (Very Important!)

After you add a new user with the Password Editor, you must open the PowerTrax Pro Users table and create a User record for that person. Unless a User record is created, the individual will not be able to log in and use PowerTrax Pro. A User record contains personal information such as the user's name, employment start date, and commission rate. You also use the User input form to add the user to one or more sales teams, and to create an e-mail account for the user.

To add a new user record:

1. Click the 'Users' button on the Navigation Palette to open the Users table.
2. Click the 'Add' (+) button. A blank Users input form appears.

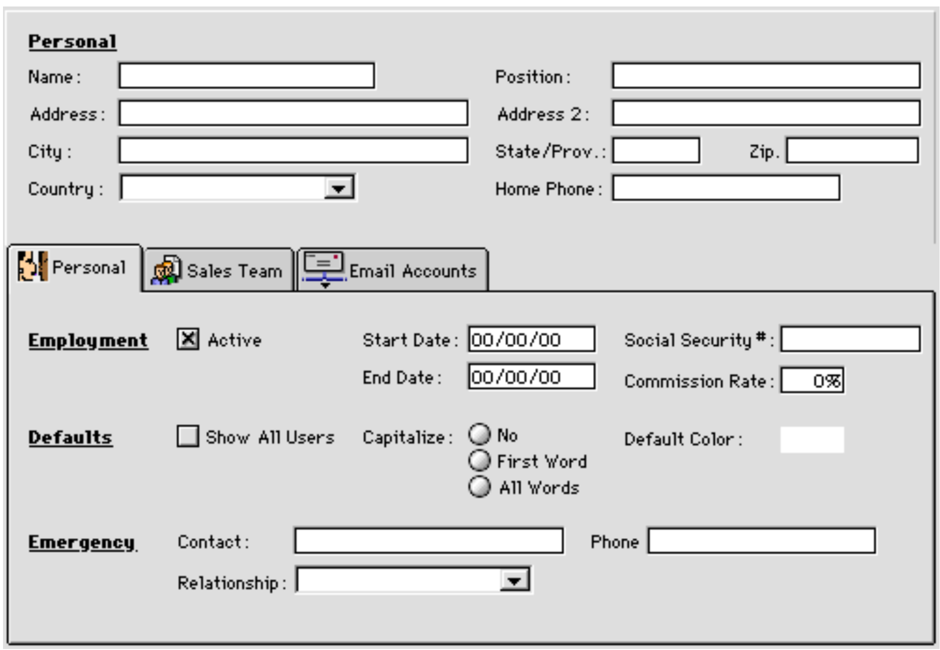


Figure 1-12: New User Input Form

3. Enter the user's name and address information at the top of the input form.

The bottom half of the input form contains a series of Tabs where you can enter the user's personal information, sales team assignment and e-mail account. These Tabs are described in detail in the following sections.

The Personal Tab

The Personal Tab (shown above) allows you to enter personal user information such as a start date, commission rate, data entry defaults and emergency contact data.

1. Make sure the 'Active' checkbox is selected, then enter the new user's 'Start Date,' 'Social Security #' and 'Commission Rate' in the fields provided.

Note The value you enter in the ‘Commission Rate’ field is used to specify the user’s commission splits when you assign them to a sales team. See “The Sales Team Tab” below for details.

The Defaults section of the Personal Tab allows you to customize various data entry defaults for the new user.

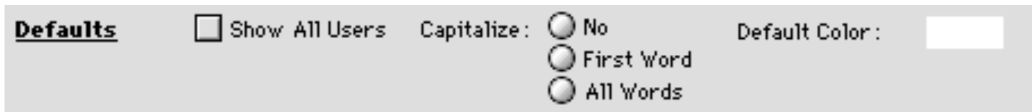


Figure 2-13: Data Entry Defaults

Show All Users
Each contact record in PowerTrax Pro contains a list of activities (phone calls, meetings, etc.) that involved that contact. If the ‘Show All Users’ checkbox is selected, the contact activity list will show activities for all users in your company who have dealt with the contact. By default, the ‘Show All Users’ checkbox is not selected. This means that the contact activity list will show only the activities that were carried out by this user. See Chapter 4 of the *PowerTrax Pro User’s Guide* for information about contacts and activities.

Capitalize
The ‘Capitalize’ radio buttons allow you to specify how data will be displayed when entered by this user. If ‘No’ is selected, all the data entered by this user will appear in lower case letters. If ‘First Word’ is selected, the first word of each entry will be capitalized (john smith --> John smith). If ‘All Words’ is selected, all words in each entry will be capitalized (john smith --> John Smith).

Default Color
PowerTrax Pro’s scheduling window displays the scheduled activities for all users in your company. Each user’s activities can be color coded to make it easier to see which activities belong to which users. To assign a color code for the new user’s activities, simply click the ‘Default Color’ control and select a color from the palette that appears.

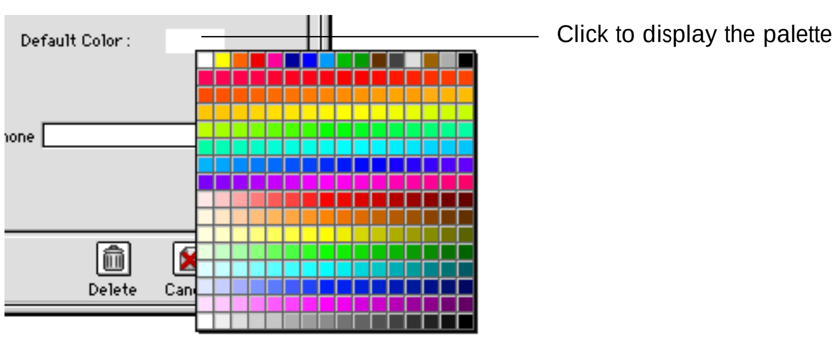


Figure 2-14: Color Palette

See Chapter 6 of the *PowerTrax Pro User’s Guide* for information about the scheduling window.

2. After setting the user’s defaults, enter any emergency contact information at the bottom of the Personal Tab. (Optional)

The Sales Team Tab

In order for PowerTrax Pro to track commissions, each sales person must belong to a sales team. If you've already created one or more sales teams, you can assign the user to a team using the controls available here. If you haven't already created your sales teams, you can open the Sales Team table, create the teams and assign the user to a team from there. See Chapter 4 for information about creating sales teams.

If you've already created a team and wish to assign this user to it:

1. Click the Sales Team tab on the Users input form.

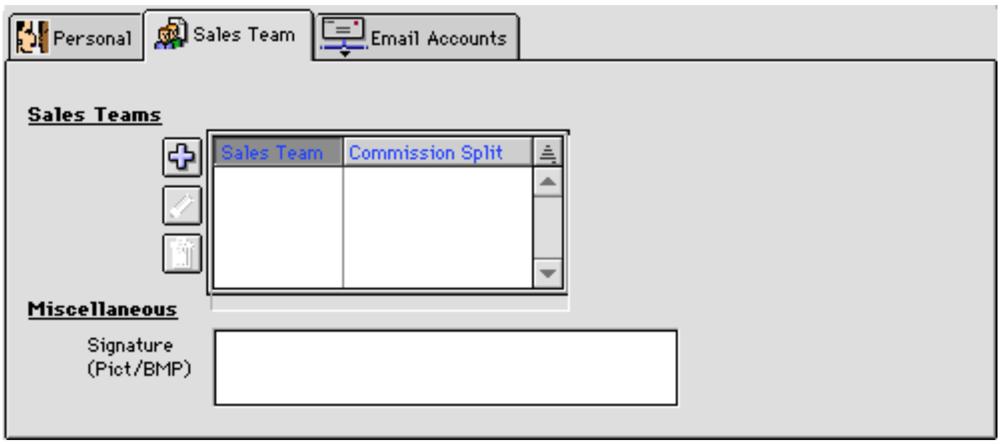


Figure 2-15: Sales Team Tab

2. Click the 'Add' (+) button next to the Sales Team list. A list of available sales teams appears.

Figure 2-16: List of Sales Teams

3. Highlight the team you want to add the user to, then click 'Select.' The name of the team will appear in the Sales Team list, indicating that the user is now a member of that team.

Creating an E-Mail Account

In order for a user to be able to access PowerTrax Pro's built-in e-mail features, you must create an e-mail account for that user. This process includes adding an account name and password, specifying an e-mail address, and identifying your organization's SMTP server.

To create a user's e-mail account:

1. Click the Email Accounts Tab on the Users input form.

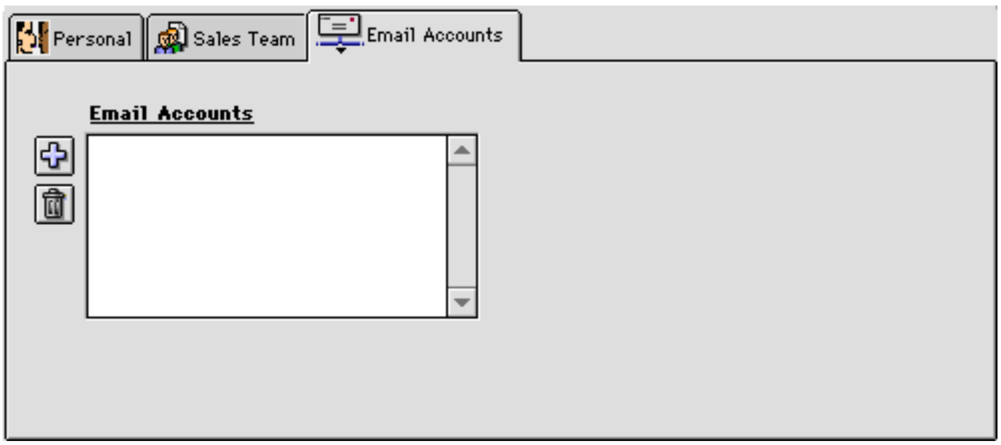


Figure 2-17: Email Accounts Tab

2. Click the 'Add' (+) button next to the list of E-Mail Accounts. A blank E-Mail Account input form appears.

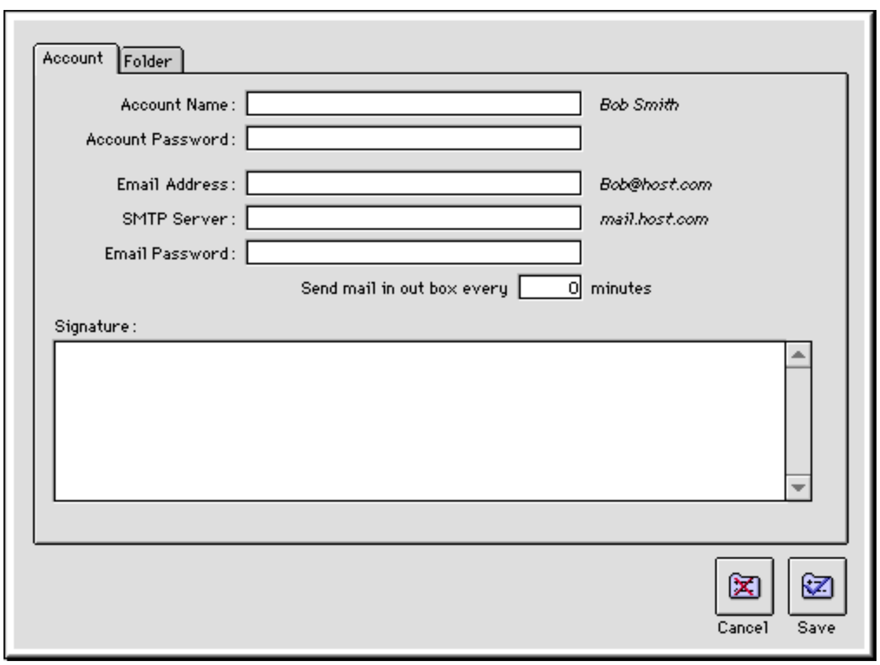


Figure 2-18: E-Mail Account Input Form

3. Enter the account information as shown in the table below:

Account Preferences

Preference	Description
Account Name	The name you want to attach to the user's e-mail account. This is usually the user's name (i.e. Bob Smith)
Account Password	Blocks other users from accessing the account without authorization (i.e. they have to have the password). If the field is left blank, others can automatically access the account.
E-mail Address	The user's Internet e-mail address (Tim@softsinc.com for example).
E-mail Password	The e-mail password to the user's e-mail account on your POP3 Internet e-mail server.
SMTP Server	The Internet address of your SMTP (outgoing) e-mail server (mailaustin.computize.net for example).
Signature	You can type a personalized signature that can be included on the user's outgoing e-mail messages.

Setting Mail Folder Preferences

The Folder tab let's you choose when mail should be automatically deleted.

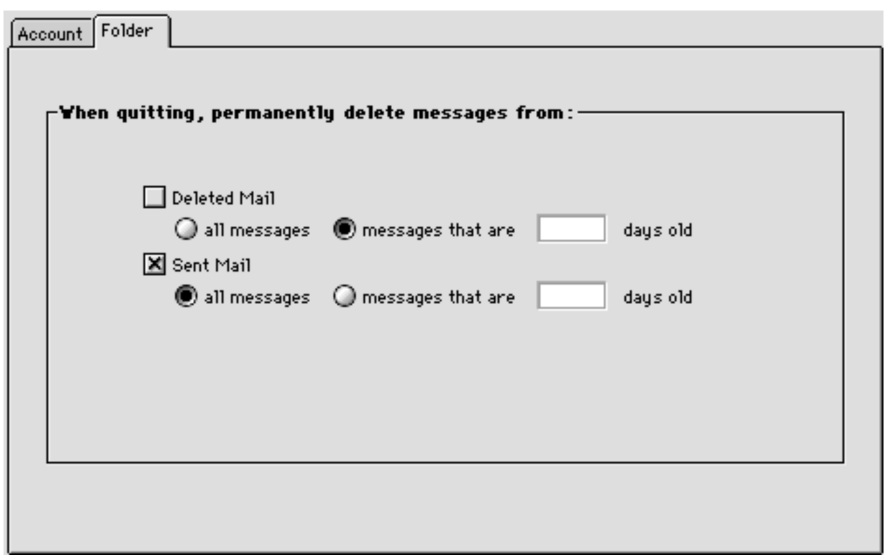


Figure 2-19: Folder Preferences

By default, mail will not be deleted until the user clicks the Delete button. However, by using the Auto Delete options, the user can have mail deleted automatically. For each folder, you can delete all messages in a folder or delete only those messages that are older than the number of days you specify.

1. Click the ‘Deleted Mail’ or ‘Sent Mail’ checkboxes (or both) to indicate which folders you want to use automatic deletion on.
2. If you want to automatically delete all messages from the selected folder, click the ‘all messages’ radio button.
3. If you want to automatically delete only messages a certain number of days old, click the ‘messages that are’ radio button, the enter the number of days that you want.

3

Sales Teams

In this chapter:

This chapter shows you how to set up sales teams in order to track commissions and set sales objectives. You'll learn how to create a team, add and delete team members, specify commission percentages and set sales objectives for that team.

Creating Sales Teams

In order for PowerTrax Pro to track commissions, each sales person must belong to a sales team. A sales team can have one or more members, and each member is assigned a set commission rate.

Creating a Sales Team

1. Click the 'Sales Teams' button on the Navigation Palette to open the Sales Teams table.
2. Click the 'Add' (+) button at the bottom of the Sales Team list screen. A blank Sales Team input form appears.

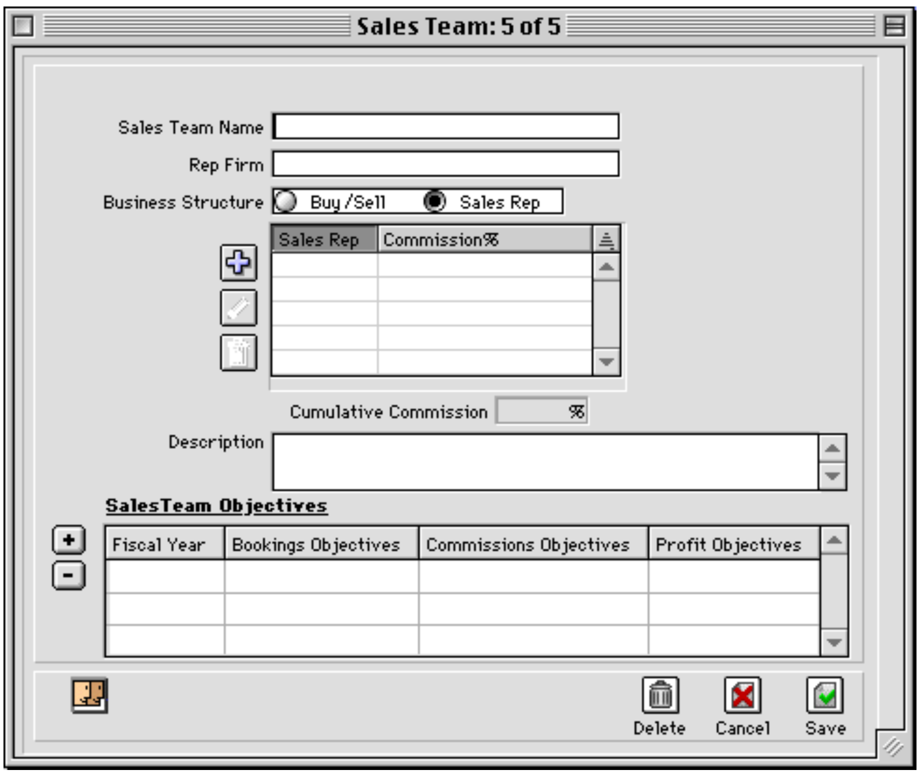


Figure 3-1: Sales Team Input Form

3. Enter a name for the sales team. If the team has only one member, it's acceptable to use that member's name as the team name. Otherwise, it's best to use a descriptive name for the team.

Note If there is only one rep firm specified in your PowerTrax Pro database, the ‘Rep Firm’ field is filled in automatically for you. If your database has multiple rep firms specified, tab into the ‘Rep Firm’ field to display a list of the rep firms. Simply select the firm you want to assign the current team to.

4. Click either the ‘Buy/Sell’ or ‘Sales Rep’ radio button to specify the business structure of the current sales team.
5. Once you’ve established the team name and business structure, you can begin adding team members. Click the ‘Add’ (+) button to display the list of sales reps (users) in your company.

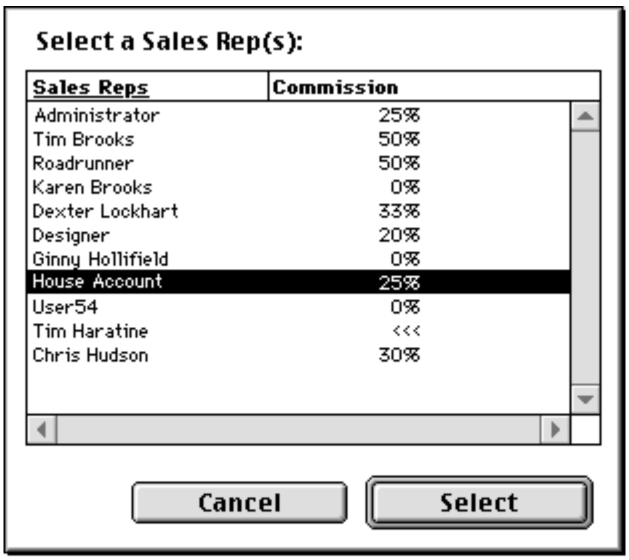


Figure 3-2: List of Sales Reps

6. Click the user you wish to add, then click the ‘Select’ button. The user appears in the list of team members. Notice that the commission percentage is automatically set. This commission percentage is determined when the User record is created. See Chapter 2 of this guide for details about creating a User record.

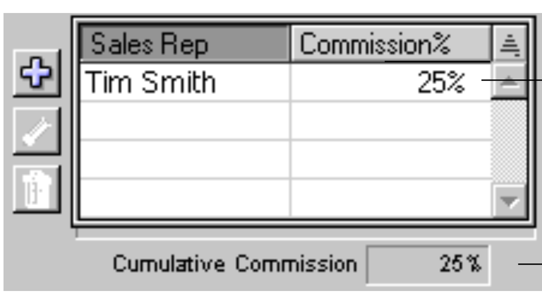


Figure 3-3: New Team Member

The ‘Cumulative Commission %’ field shows the total commission percentage for the entire team.When another team member is added, that member’s commission percentage will be added to the team total.

Note Remember to set aside a percentage of the team commission to go to your business rather than to a sales rep. For example, if the ‘House Account’ receives70% of the commissions received from a principal, the remaining 30% must be divided among the other members you add to the team. The total team percentage cannot exceed 100%.

7. Repeat Steps 5 and 6 to add more team members.

8. If desired, you can enter a description of the sales team in the ‘Description’ field.

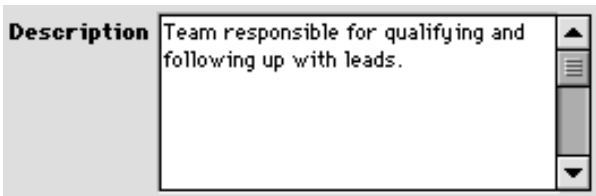


Figure 3-4: Sales Team Description

9. Click the ‘Save’ button on the input form to save the new sales team.

Editing a Team Member

To view and edit the details of any team member:

1. Double-click the member’s name in the team list on the Sales Team input form. The User Sales Team input form appears.

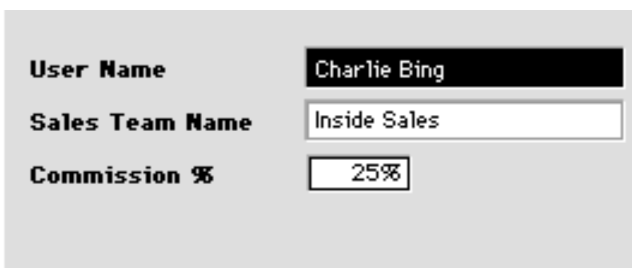


Figure 3-5: User Sales Team Input Form

2. Using this input form, you can change both the user name and commission percentage. Click the ‘Save’ button to save any changes you make.

If you've specified the team business structure as 'Reseller,' you'll see two additional fields on the User Sales Team input form—"Commission Basis' and 'Minimum Pricing.'

Figure 3-6: Input Form with Extra Fields

3. If you click the 'Commission Basis' field, a list of choices appears.

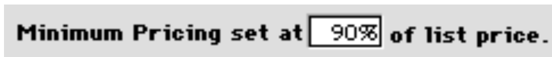
Figure 3-7: Choices for Commission Basis

4. Select the commission basis you want, then click 'OK.' If you want to add more items to the list, click 'Modify.'

Figure 3-8: Modifying the Commission Basis List

5. Click ‘Append’ to add a new item to the end of the list. Click ‘Insert’ to insert a new item directly above the currently selected item. Click ‘Delete’ to remove a selected item. After you’ve made the changes you want, click ‘OK’ to return to the User Sales Team input form.

   You can also specify a minimum price for any items sold.



6. Click the ‘Save’ button to save any changes you make.

Adding Sales Objectives

The Sales Team input form contains a list where you can edit and view sales objectives for the current sales team.

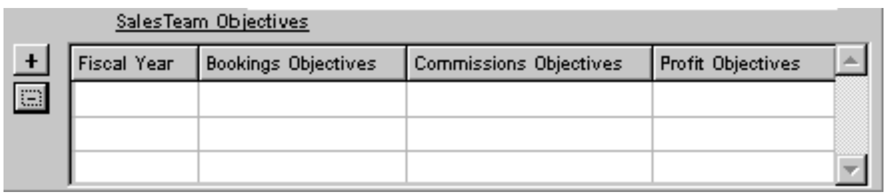


Figure 3-9: Sales Objective List

In PowerTrax Pro, setting sales objectives is a three step process. First you set yearly sales objectives for each principal (see Chapter 2 of the *PowerTrax Pro User’s Guide*). Second, you set sales objectives for each customer so you know how much each one has to buy in order to meet your principal objectives (see Chapter 5 of the *PowerTrax Pro User’s Guide*). Finally, you assign those principal and customer sales objectives to your sales teams.

To assign a sales objective to a sales team:

1. Click the ‘Add’ (+) button to the left of the Objectives list. The Objectives input form appears.

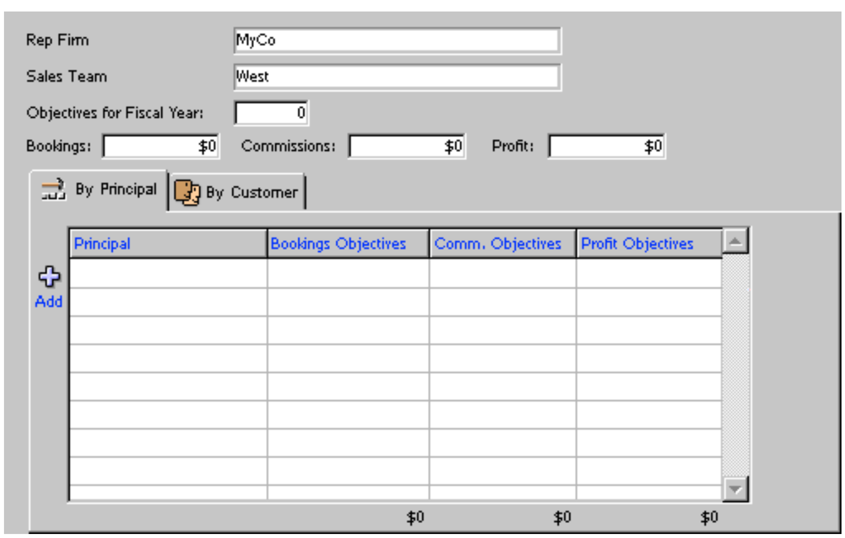


Figure 3-10: Objectives Input Form

2. Enter the fiscal year that you're targeting in the 'Objectives for Fiscal Year' field.
3. Fill in the 'Bookings,' 'Commissions' and 'Profit' objectives for the entire fiscal year.

Once you've established the overall objectives for the current team, you can break that objective down by principal and by customer using the Tabs at the bottom of the Objectives input form.

To break your objective down by principal:

4. Click the 'By Principal' Tab, then click the 'Add' (+) button. A list of principal objectives for the current year appears.

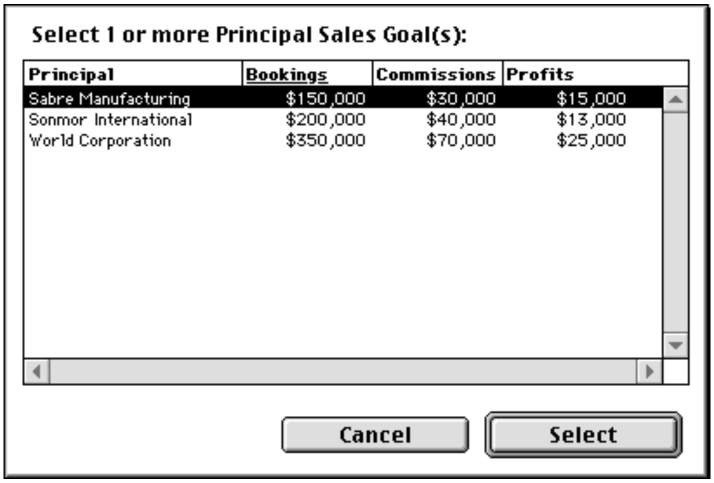


Figure 3-11: Principal Objectives

5. Highlight the principal objectives that you want to assign to this team, then click 'Select.' The selected objectives now appear in the list on the By Principal Tab.

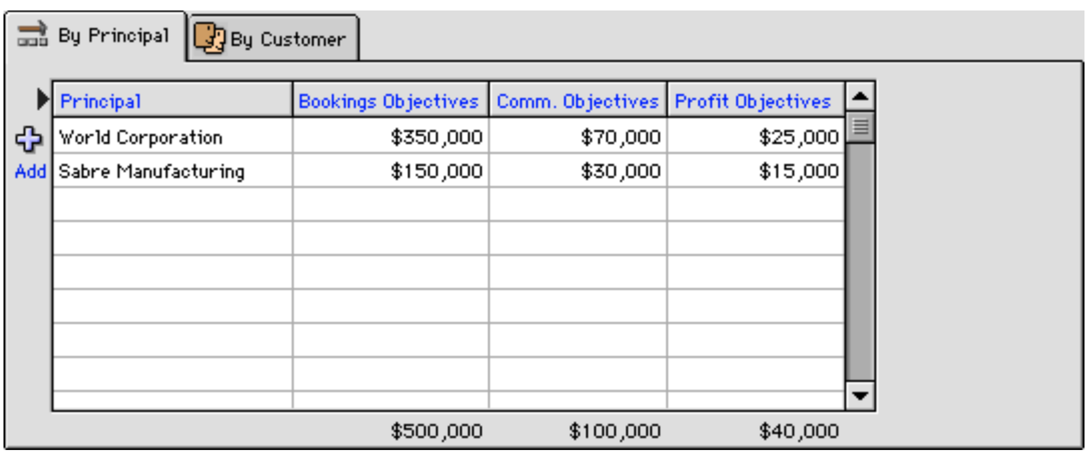


Figure 3-12: Objectives by Principal

To break down your yearly objective by customer:

1. Click the ‘By Customer’ Tab, then click the ‘Add’ (+) button. A list of customer objectives for the current year appears.

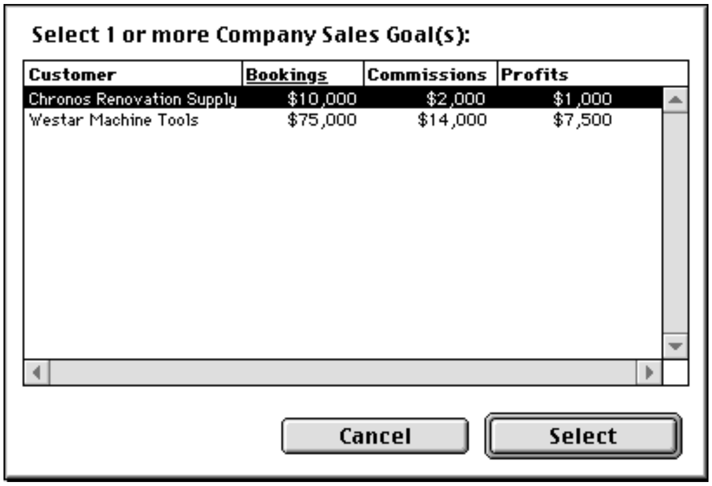


Figure 3-13: Customer Objectives

2. Highlight the customer objectives that you want to assign to this team, then click ‘Select.’ The selected objectives now appear in the list on the By Customer Tab.

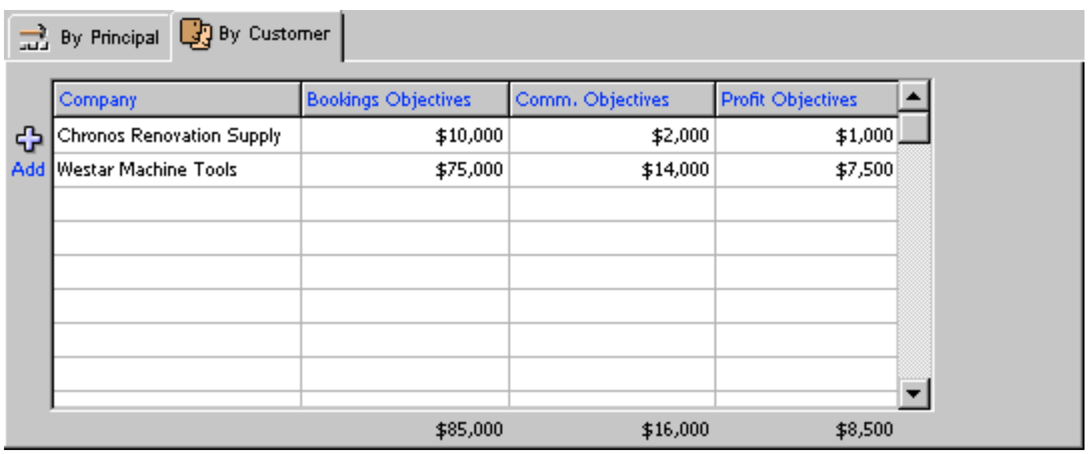


Figure 3-14: Objective by Customer

3. Click the ‘Save’ button to save the record. The new objective appears in the Sales Objectives list on the Sales Team input form.

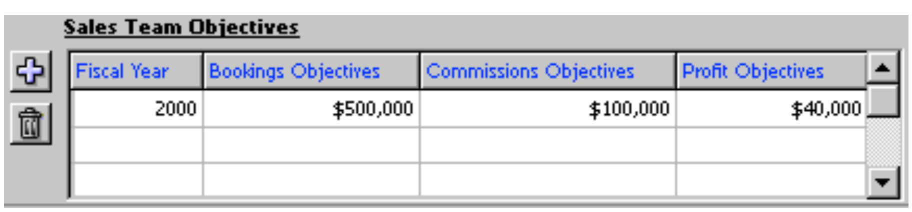


Figure 3-15: New Sales Objective

4

Rep Firm Information

In this chapter:

This chapter shows you how to personalize PowerTrax Pro for your organization by adding company information such as billing and shipping addresses, phone and fax numbers, and company logos. You'll also learn how to create your own auto-numbering system for quotes and orders. For resellers and buy/sell reps, this chapter includes information on how to specify the pricing your organization receives from your suppliers.

Adding Company Information

A Rep Firm record contains a variety of information about your company including your company name, addresses, phone numbers, logos, price schedules, sales teams, and the numbering system for your quotes, orders, and purchase orders. This section describes how to add your basic company information (name, address, phone numbers and logo) to PowerTrax Pro.

Initially, your PowerTrax Pro database does not contain any Rep Firm records. You must create a new Rep Firm record before you can add your company information.

To create a new Rep Firm record:

1. Click the 'Rep Firms' button on the Navigation Palette to open the Rep Firms table.
2. Click the Add (+) button at the bottom of the list screen. A blank Rep Firm input form appears.

   The first Tab you see is the Address Tab. The Address Tab is designed to hold general company information such as your company name, address, phone information and tax status.

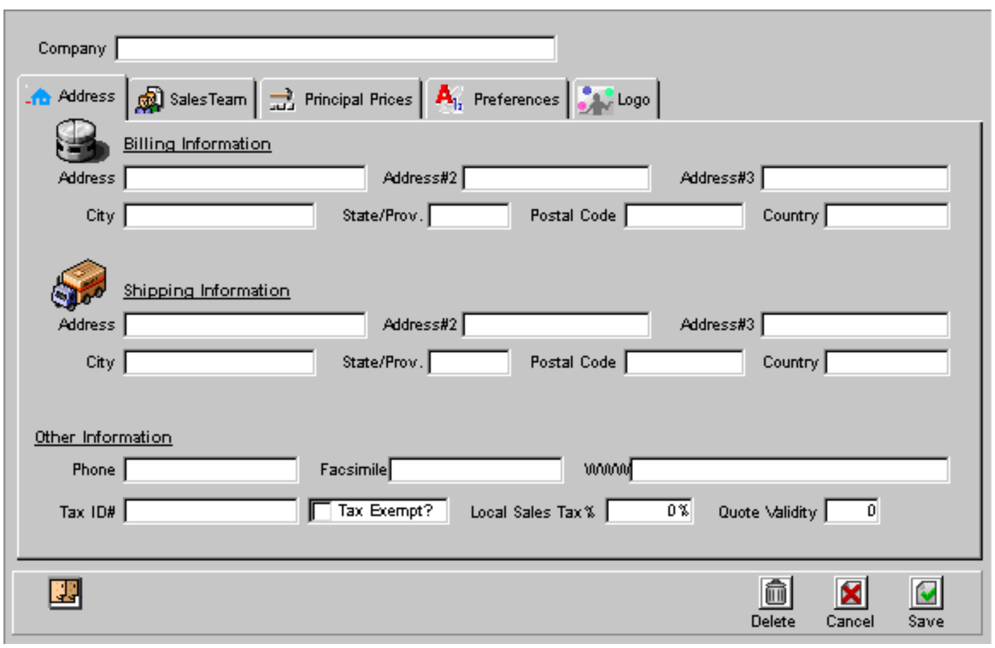


Figure 4-1: Rep Firm Input Form

3. Enter your company name in the 'Company' field.
4. Enter your company's billing and shipping addresses in the fields provided.
5. Enter your company's phone, fax, and web site (if applicable) information in the appropriate fields under the 'Other Information' section.

6. Enter your company's tax identification number in the 'Tax ID #' field.
7. If your organization is tax exempt, click the 'Tax Exempt' checkbox.
8. Enter your local sales tax percentage in the 'Local Sales Tax %' field.
9. If you place time limits on your quotes (15 days, 30 days, and so on) enter the number of days that quotes are valid in the 'Quote Validity' field. When a salesperson issues a quote, Power-Trax Pro will use the number you enter here to calculate the expiry date for the quote.

The Logo Tab

The Logo Tab provides a place to store your company logo so that it will appear in the header of your printed quotes, orders, invoices, and purchase orders.

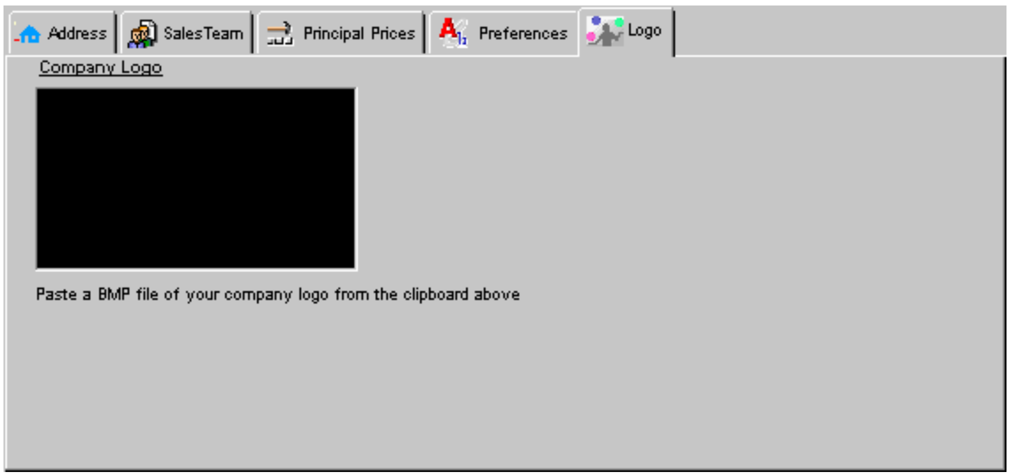


Figure 4-2: Logo Tab

To add your company logo:

1. Copy your company logo to your computer's Clipboard.
2. Open the Rep Firm input form, then click the Logo Tab.
3. Click the 'Company Logo' field to select it.
4. Paste your logo into the field.

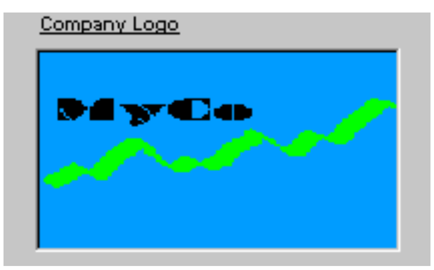


Figure 4-3: Pasting a Logo

5. After adding your company information and logo, click 'Save' to close the Rep Firm input form and save your data, or continue on and fill out the remaining Tabs. See the following sections for details about filling out the other Rep Firm input form Tabs.

The Sales Team Tab

PowerTrax Pro uses the concept of sales teams to track commissions for sales people in your organization. Each sales team has one or more members, and each team member is assigned a specific ‘cut’ of the team’s commission.

The Sales Team Tab is used to display a list of all the sales teams that have been configured for your organization.

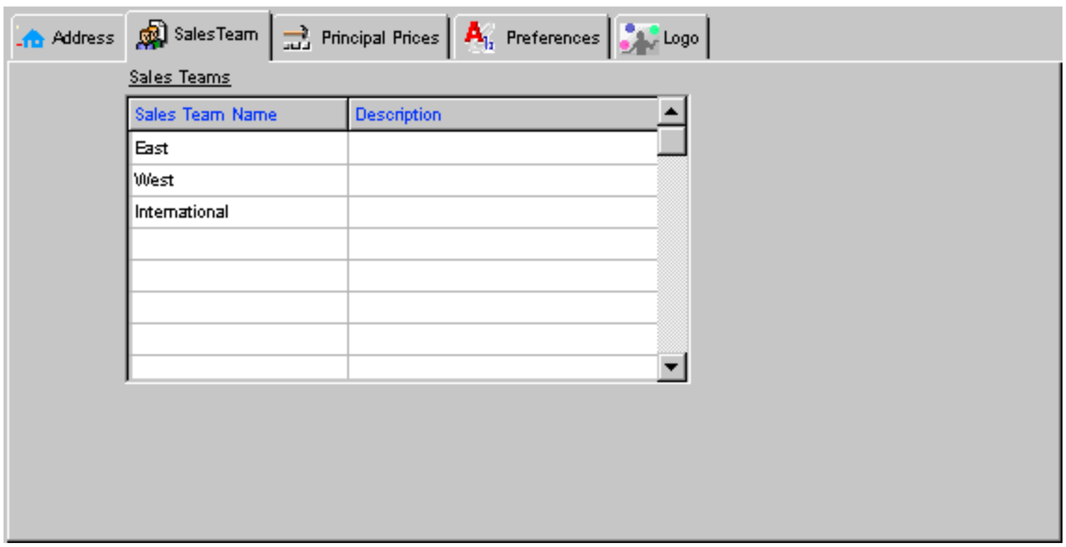


Figure 4-4: Sales Team Tab

Note The information on the Sales Team Tab is for display only. To add, delete or edit sales team information, you must open the Sales Team table and use the Sales Team input form. See Chapter 3 of this manual for details.

Automatic Number Generation

Transactions such as quotes, purchase orders and invoices need to be numbered uniquely for identification purposes. By default, PowerTrax Pro will number your transactions sequentially as each record is created (1,2,3,4…and so on). The Administrator can use the Preferences Tab to configure an automatic numbering system that’s customized for your company’s needs. For example, instead of using plain numbers for quotes, you can have quote numbers that use a number plus text such as your company name (MyCo1, MyCo2, MyCo3…and so on).

Your autonumbering system can be made up of any combination of the following components:

- the current date
- a sequential number
- static text

The instructions below show how to configure an autonumbering definition that uses static text and a sequential number (MyCo1, MyCo2, MyCo3).

1. Open your Rep Firm record and click the Preferences Tab.

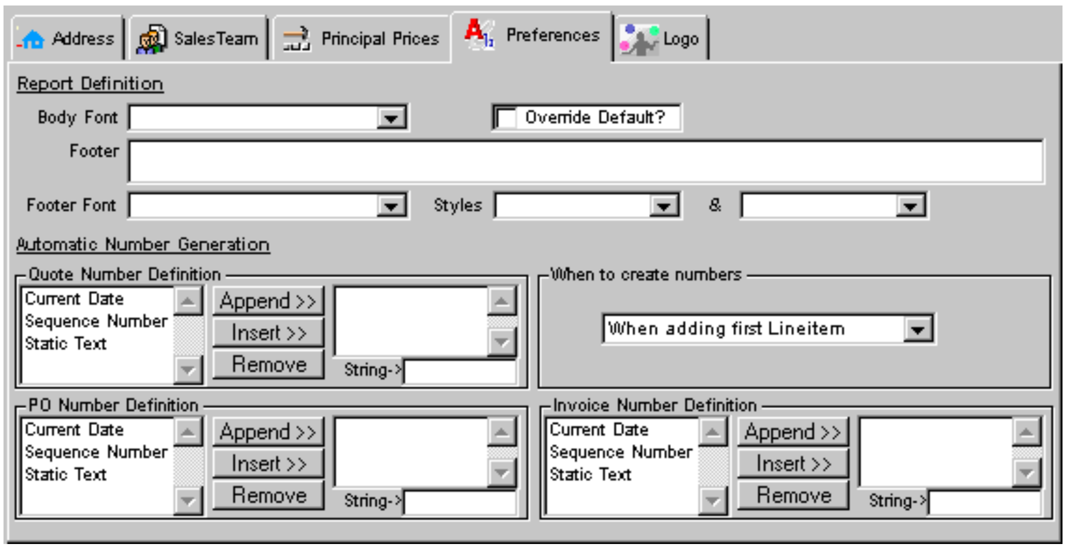


Figure 4-5: Rep Firm Preferences Tab

The Preferences Tab is made up of two separate sections. The top section is used to specify custom formats for your printed reports. The bottom section contains the controls for configuring an autonumbering system for your company's quotes, purchase orders and invoices. The information below deals with configuring an autonumbering system. For information on how to specify custom formats for reports, please see Chapter 5.

2. Go to the 'Quote Number Definition' section.

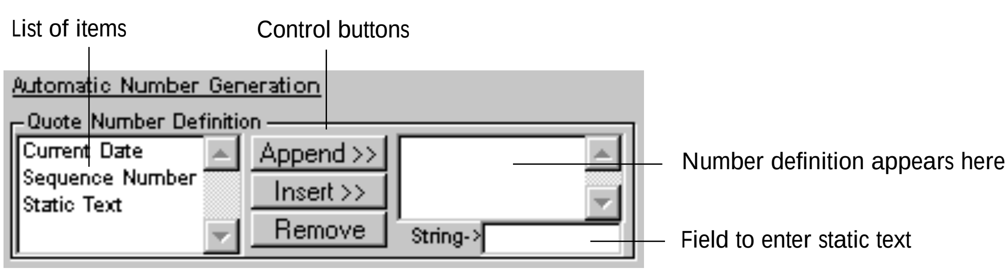


Figure 4-6: Quote Number Definition

The list on the left contains the items you can use to make up your custom numbers. The Control buttons allow you to append, insert, or remove items in your number definition. The list on the right displays the items that have been inserted or appended.

3. Select ‘Static Text’ then click the ‘Insert’ button. The Static Text item appears in the list on the right.

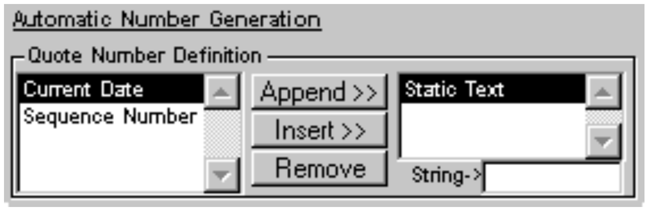


Figure 4-7: Static Text Item Added

When you use the Static Text item, you must specify what text you want to appear in the number definition by entering a value in the ‘String’ field.

4. Using our current example (MyCo1, MyCo2, etc.) you would type ‘MyCo’ in the ‘String’ field.

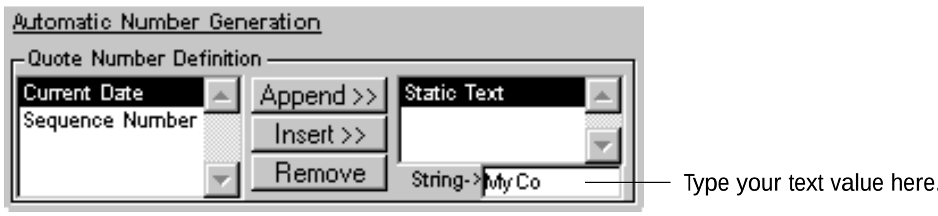


Figure 4-8: Specifying the Text

5. Select the ‘Sequence Number’ item and click ‘Append.’ PowerTrax Pro will add the Sequence Number item after the Static Text item.

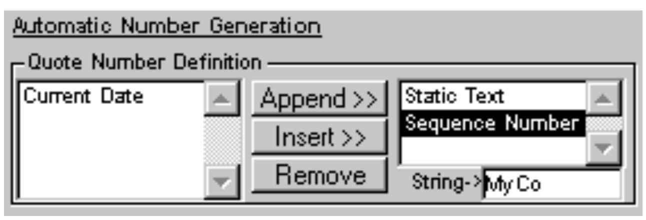


Figure 4-9: Sequence Number Added

When you include the ‘Sequence Number’ item in your definition, you’re instructing PowerTrax Pro to use the next available sequence number when a new transaction is created. For example, if the last quote number was ‘MyCo100,’ the next sequential number would be ‘MyCo101.’ See “The Sequence Number Editor” later in this chapter for information on how to specify where your number sequences begin.

The last step is to specify when the quote, purchase order, or invoice number will be generated. PowerTrax Pro can generate a sequential number when the user selects a transaction type, or when the user adds the first line item to a transaction.

To specify when a number is generated:

6. Click the ‘When to create numbers’ pull-down list and select an option.

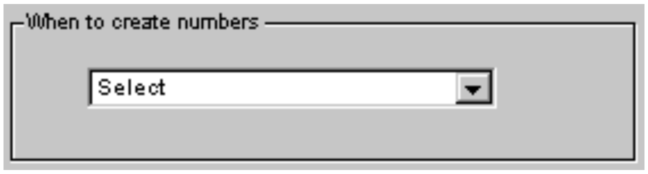


Figure 4-10: When to Create Numbers

The Order of Items

It’s important to note that top-to-bottom ordering of the number definition items determines how your number definition will look. Using the example shown in the following illustration, the top-to-bottom order of items would produce text followed by a number (MyCo1).

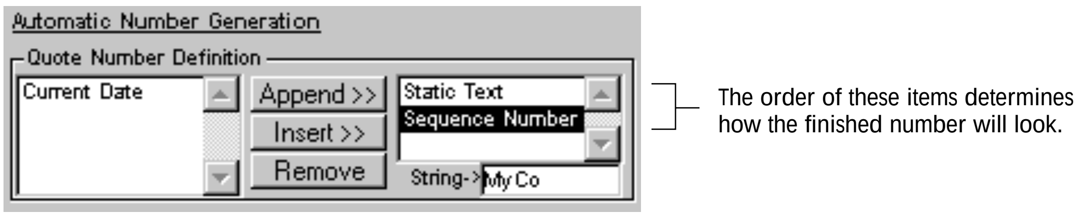


Figure 4-11: Text and Number

If you change the top-to-bottom order of the items in the right hand list, you change how the finished number definition will look.

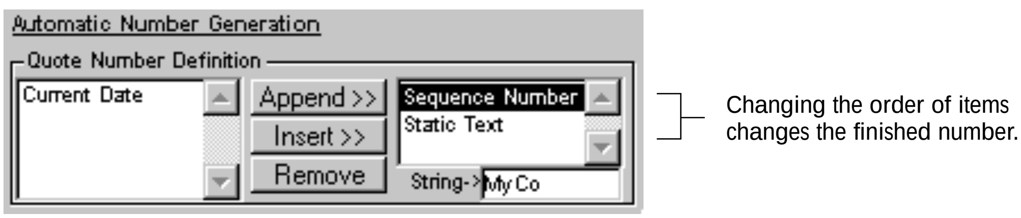


Figure 4-12: Changing the Order of Items

For example, putting the sequence number first, followed by the static text as in the illustration above, would produce 1MyCo, 2MyCo, and so on.

You use the ‘Append’ and ‘Insert’ buttons to determine the order of the items in your definition. Whenever you add an item from the list on the left to the list on the right, that item becomes the currently selected item in the right list.

When you select the next item to be added:

- Clicking 'Append' will append the next item <u>after</u> the item that's currently selected in the right hand list.
- Clicking 'Insert' will insert the next item <u>before</u> the item that's currently selected in the right hand list.

The Sequence Number Editor

PowerTrax Pro's default numbering sequences for each data table begin at the number one (1). For example, when you add your first contact record, that contact would be record 1. The next contact you add would be record 2, and so on.

As the Administrator, you can change the default sequence so that your records start at a different number. For example, if you're switching to PowerTrax Pro from another database, you probably already have a number of quotes in the old database. Suppose that the last quote in the old database is quote #100. You'd want you first PowerTrax Pro quote to be #101, not #1.

Note We recommend that you only change your numbering sequences under the supervision of Soft Solutions technical support.

Changing the start of your number sequences is done with the Sequence Number Editor.

1. Choose **File > Administration** from the main PowerTrax Pro menu bar. The Administration dialog appears.

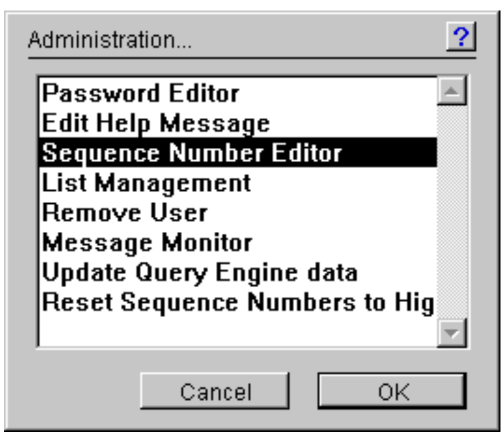


Figure 4-13: Administration Dialog

2. Select 'Sequence Number Editor, then click 'OK.' The Sequence Number Editor appears.

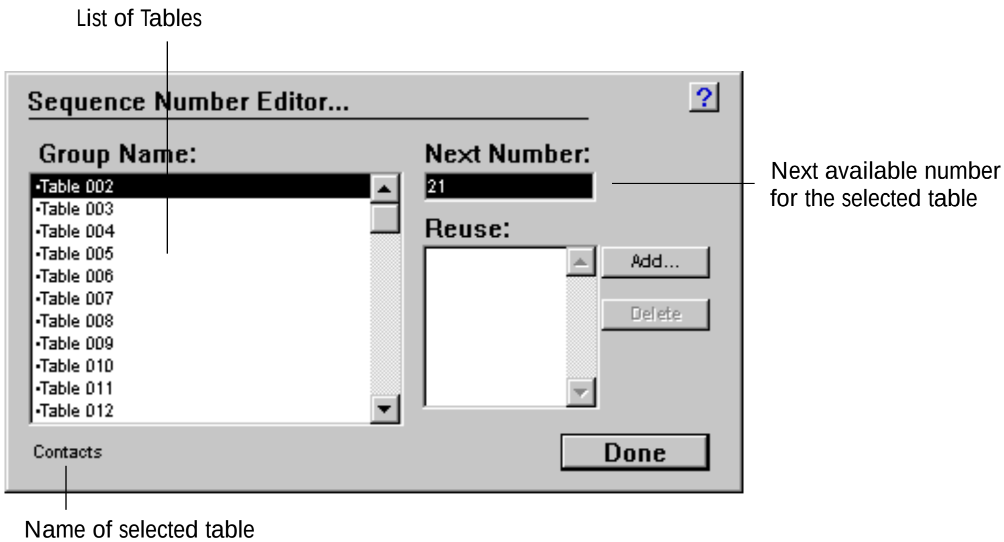


Figure 4-14: Sequence Number Editor

The numbered list on the left shows each table in the database. When you select a table, its name appears below the list and the next available record number for that table is displayed in the 'Next Number' field.

By default, sequence numbers for each table start at 1 and increase by 1 each time a record is added. To change the starting number for any table:

1. Select the table you want by clicking its number in the list.
2. Enter the number you wish to use in the 'Next Number' field. For example, if you want the next available record number to be 75, enter '75' in the 'Next Number' field.
3. Click 'Done' to update the numbering sequence.

Note When you change a numbering sequence it only affects the numbering for the selected table. The numbering for all other tables remains the same.

Adding your Cost of Goods

If you're a reseller or a buy/sell rep, use the Principal Prices Tab to specify your cost when buying product from your suppliers.

Note Principals and their corresponding price schedules must be added to your database before you can assign a price schedule to your rep firm. See Chapter 2 of your *PowerTrax Pro User's Guide* for details about how to add principal information and price schedules.

Once principal information and price schedules are available:

1. Click the Principal Prices Tab on the Rep Firm input form. Initially, the list of prices is blank.

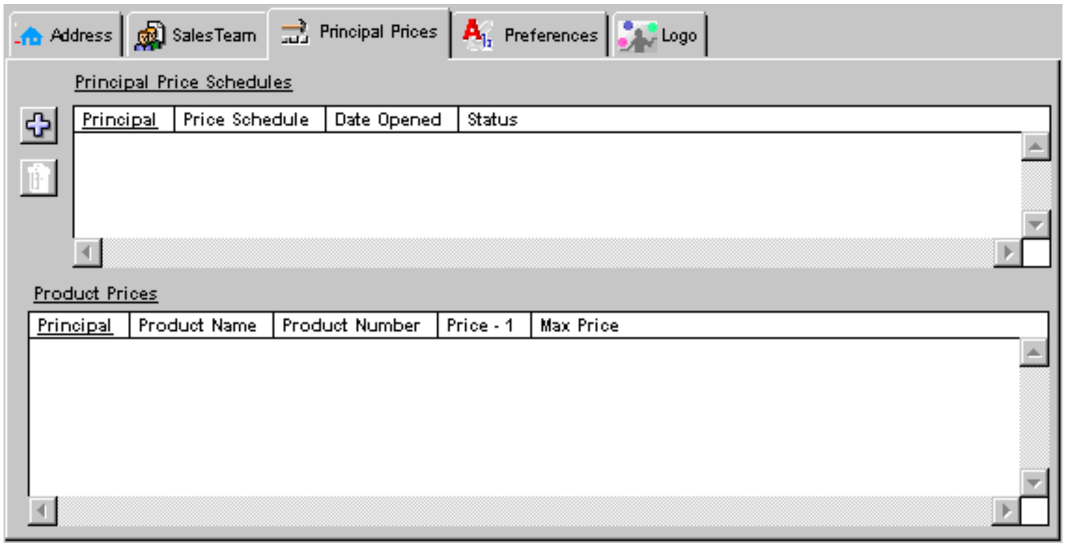


Figure 4-15: Principal Prices Tab

2. Click the ‘Add’ (+) button. A list of principal price schedules appears.

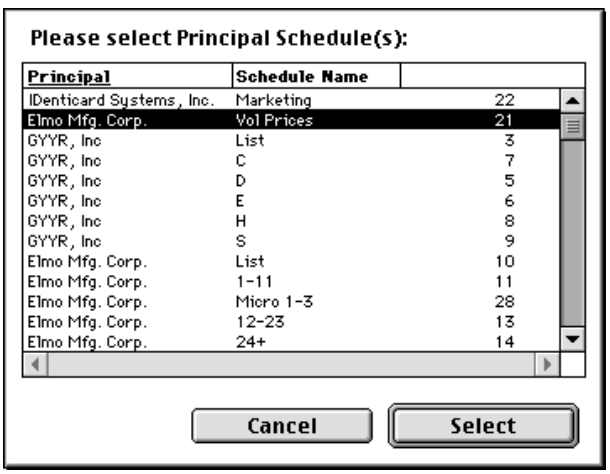


Figure 4-16: Principal Price Schedules

3. Select the price schedule you want, then click the ‘Select’ button. The price schedule now appears in the list on the Principal Prices Tab. A list of that principal’s products and appropriate prices also appears.

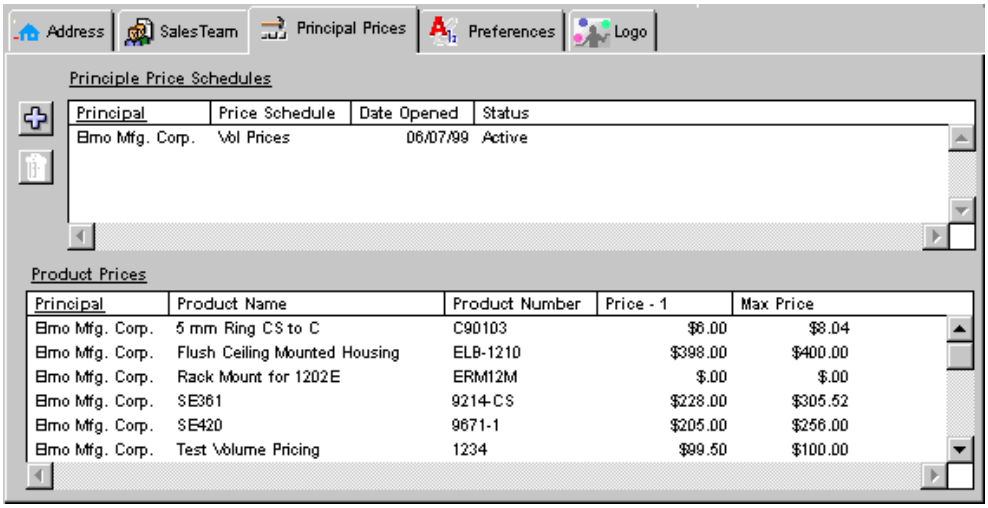


Figure 4-17: New Schedule Added

4. Click the ‘Save’ button to save your changes.

4-12 Rep Firm Information

5

Custom Formats

In this chapter:

Introduction

Each company's information needs are unique, so PowerTrax Pro gives the database Administrator the ability to customize the display and print layouts for quotes, orders, invoices and purchase orders. For example, you can specify that an 'on screen' quote form shows a quantity, size, color, price and commission amount for each line item.

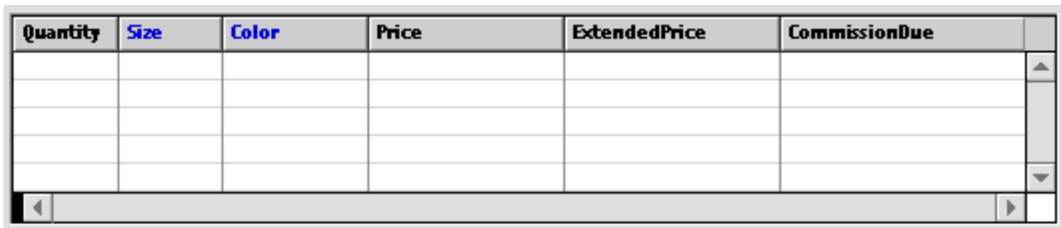


Figure 5-1: Quote Transaction Form Showing Commission

Obviously you would not want a commission amount appearing on the printed quote that gets sent to a customer, so you can specify that the print format of the same quote form will not show the commission amount.

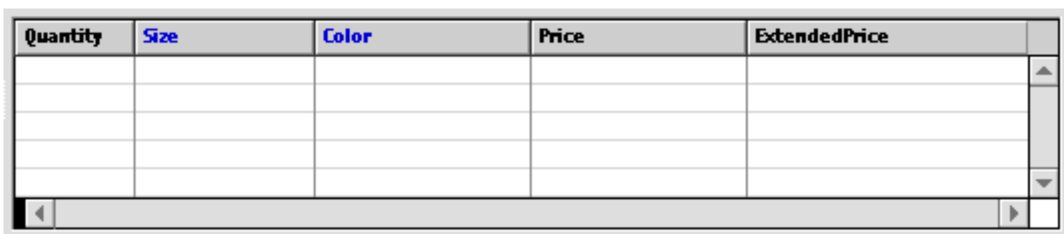


Figure 5-2: Quote Transaction Form Showing No Commission

Each type of transaction—quotes, orders and so on—can have multiple display formats and multiple print formats. You specify these different formats in the Format Definitions table.

Note The Format Definitions feature can only be accessed by the database Administrator.

Defining a Format

To define a format:

1. Click the 'Format Definitions' button on the Navigation Palette. PowerTrax Pro displays a list of all available Format Definitions.
2. Click the 'Add' (+) button at the bottom of the Formats list screen. The Format Definition input form appears.

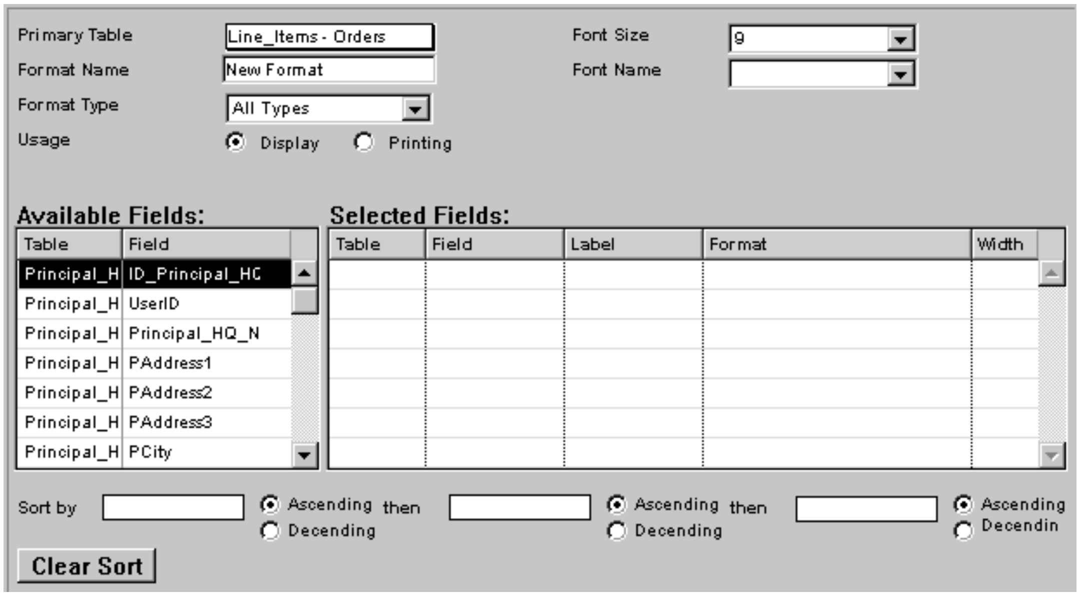


Figure 5-3: Format Definition Input Form

3. Click the ‘Primary Table’ field and select either the ‘Line_Items - Orders’ table or ‘Line_Items - Invoices’ table. The contents of the ‘Available Fields’ list will change depending on which table you specify.

Note To create a new format definition for use with a quote, order, reseller quote, reseller order, or purchase order, select the ‘Line_Items - Orders’ table. If you select the ‘Line_Items - Invoices’ instead, your new format can only be used for invoice records.

4. The ‘Format Name’ field is highlighted. Enter a name for the new format here. To make it easier for your users to identify the format it’s recommended that you use a descriptive name. For example, “Quote w/commission” or “Quote w/o commission.”

5. Next, specify the type of transaction that this format will be used with by selecting an option from the ‘Type’ pull-down list.

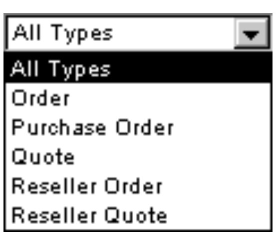


Figure 5-4: Format Types

If you select the ‘Quote’ type, your Format Definition will only be available when a user creates a Quote transaction. If you select the ‘Order’ type, the Format Definition will only be available when a user creates an Order transaction, and so on.

6. Specify whether the new format is to be used for display or printing by clicking either the ‘Display’ or ‘Print’ radio button. If you select the ‘Print’ option, the ‘Print Mode’ pull-down list appears, allowing you to select either the ‘Portrait’ or ‘Landscape’ option.

Figure 5-5: Print Mode Options

7. Specify a font size and font for the information in your format by selecting items from the ‘Font Size’ and ‘Font Name’ pull-downs. These settings determine how the line item information will appear when a user creates a transaction record using this Format Definition.

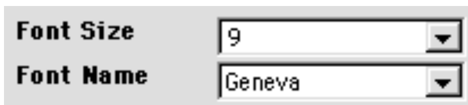


Figure 5-6: Font Options

Selecting Fields for Display

The ‘Available Fields’ list shows the names of all fields that are available for display. The ‘Field’ column shows the name of the field. The ‘Table’ column shows which table the field belongs to.

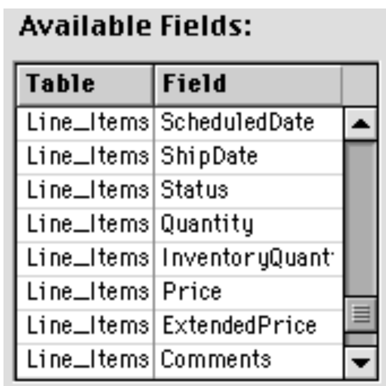


Figure 5-7: List of Available Fields

Each field selected from this list will appear as a column in the ‘Line Items’ section of the corresponding transaction input form. For example, if you select the Part Number, Quantity, Price, and Extended Price fields, the ‘Line Items’ section of the Orders input form would look like this:

Figure 5-8: Part Number, Quantity, Price, Extended

If you were to select the Quantity, Size, Color, and Price fields instead, the 'Line Items' section of the Orders input form would look like this:

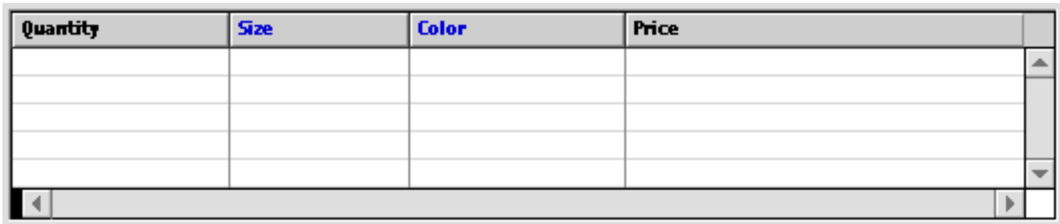


Figure 5-9: Quantity, Size, Color, Price

To include a field in your format:

1. Click and drag it from the 'Available Fields' list to the 'Selected Fields' list.

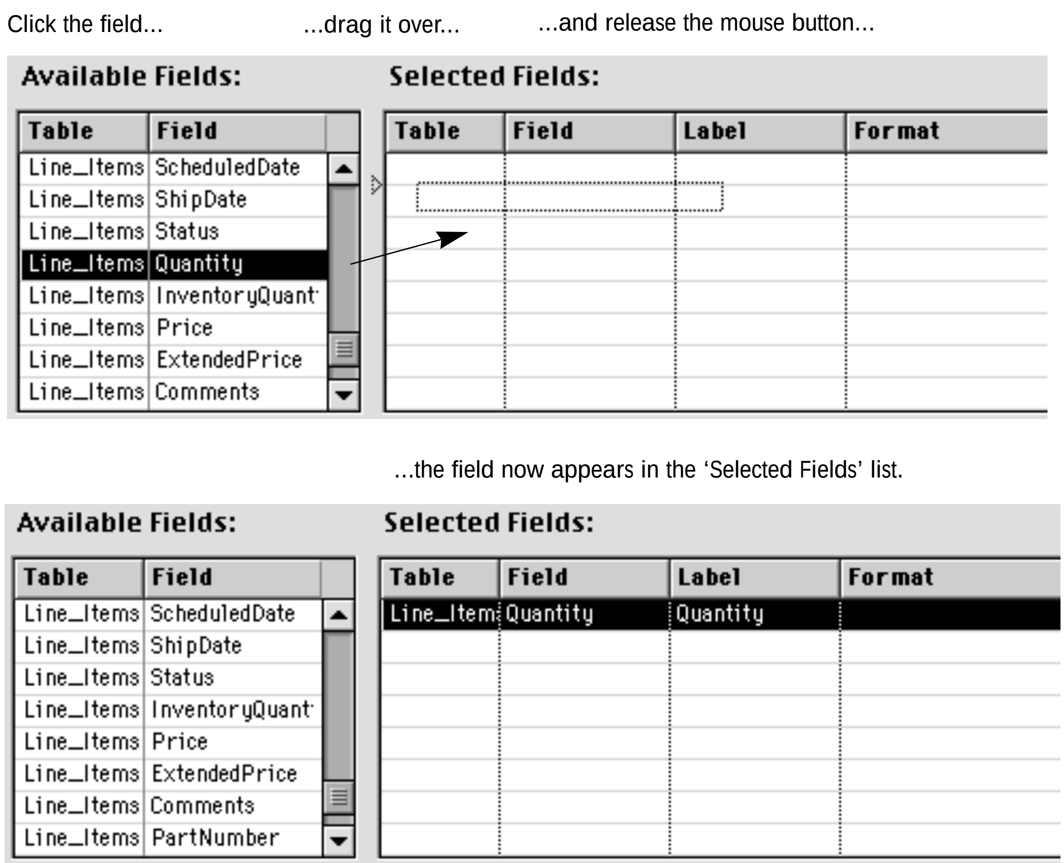


Figure 5-10: Selecting a Field

2. Repeat this for each field that you want to have as a column on your input form.

Formatting a Column

Each selected field can also have a specific data format assigned to it. For example, if you've selected the 'Total' field to appear on an Order input form, you might want the data in the resulting column to show a currency symbol and two decimal places.

1. To specify a format for a field, first click the field in the 'Selected Fields' list, then click the pull-down icon and select one of the available formats.
2. To specify the width of the column that will appear on the input form, double-click the cell in the 'Width' column to select it, then type the new value and press Tab.

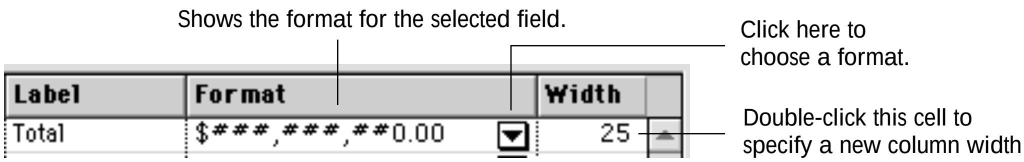


Figure 5-11: Formatting a Column

Specifying a Sort Order

You can also specify how the line items on the transaction input forms will be sorted. Suppose there are four line items on a Quote input form. You could sort them by price or product name or commission amount, or by all three. The figure below shows the line items sorted by price.

#	Principal	Product	Qty	Price	Comm. Due	Extension
3	Kalatel	KTS-2	1	$88.00	$4.40	$88.00
2	GYYR, Inc	FT2004T	1	$1,195.00	$59.75	$1,195.00
3	Elmont Mfg. Corp.	MN-421E DSP Color Camera	1	$2,100.00	$105.00	$2,100.00
4	Elmont Mfg. Corp.	UN411E Color Camera	1	$3,300.00	$165.00	$3,300.00

Figure 5-12: Items Sorted by Price

By simply specifying a new sort order on the Format Definition input form, the same Quote input form shown above would show the line items sorted by principal.

#	Principal	Product	Qty	Price	Comm. Due	Extension
3	Elmont Mfg. Corp.	MN-421E DSP Color Camera	1	$2,100.00	$105.00	$2,100.00
4	Elmont Mfg. Corp.	UN411E Color Camera	1	$3,300.00	$165.00	$3,300.00
2	GYYR, Inc	FT2004T	1	$1,195.00	$59.75	$1,195.00
3	Kalatel	KTS-2	1	$88.00	$4.40	$88.00

Figure 5-13: Items Sorted by Principal

To specify a sort order:

1. Click the field you want to sort on in the ‘Selected Fields’ list and drag it to the first ‘Sort by’ field.

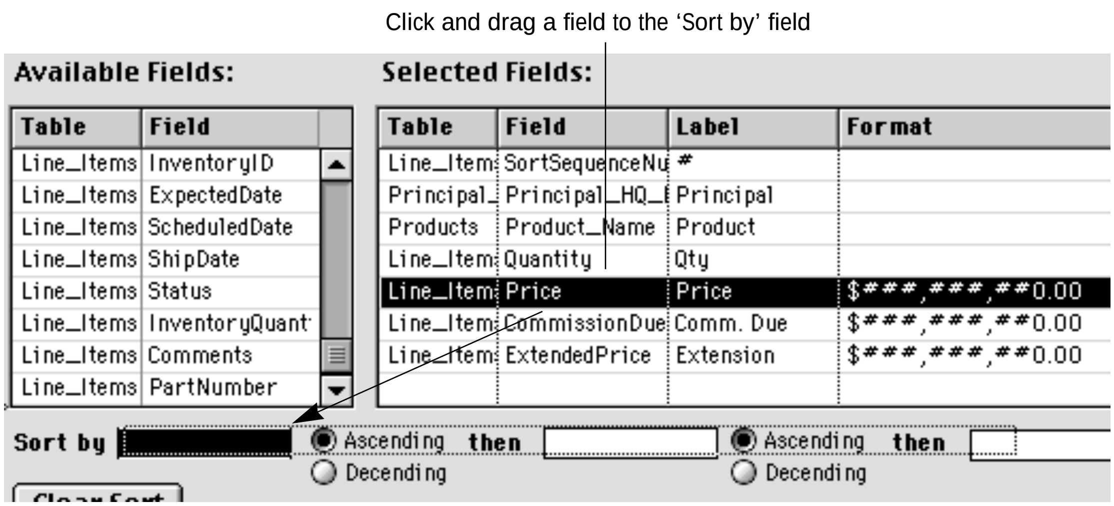


Figure 5-14: Specifying a Sort Order

2. Click the ‘Ascending’ or ‘Descending’ radio button to specify the sort direction.

3. You can specify up to three separate sorts. If you want to clear the sort order you’ve created, click the ‘Clear Sort’ button and start again.
4. After you’ve configured your Format Definition, click the ‘Save’ icon to save the new record.

When a user creates a new transaction record, the new Format Definition will appear in the list of Format Definitions on the appropriate transaction input form.

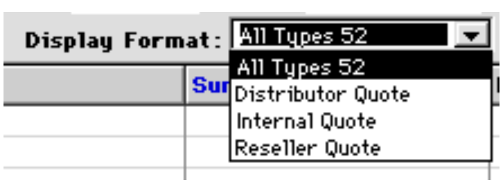


Figure 5-15: List of Format Definitions

For information on using Format Definitions with input forms, see Chapters 10 and 11 of the *PowerTrax Pro Users Manual*.

Custom Formats for Reports

PowerTrax Pro comes with a set of built-in reports that you can use to view your data. These reports have default settings for attributes such as the body font and font size for the report. The Administrator can change these default attributes to customize the look of a printed report so that it matches your other business documents.

To customize the attributes of a report:

1. Click the Rep Firm button on the Navigation Palette to open the Rep Firm table.
2. Double-click your Rep Firm record to open it, then click the Preferences Tab on the Rep Firm input form.

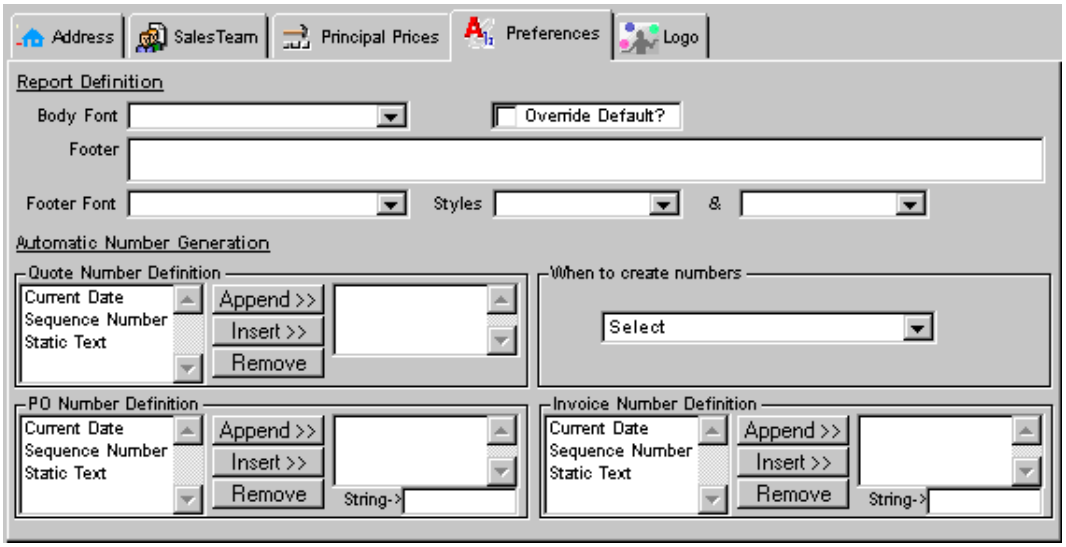


Figure 5-16: Rep Firm Preferences

The top half of the Preferences Tab contains the controls for customizing reports. The bottom half contains the controls for configuring automatic number generation for quotes, PO's and invoices. For information about automatic number generation, please see Chapter 3 of this manual.

3. Click the 'Body Font' pull-down list and select the font that you want to use in your reports. The available fonts depend on which fonts are installed on your computer.
4. Click the 'Override Default' checkbox to tell PowerTrax Pro to use your new settings rather than the default report settings.

To add a custom footer to the report:

5. Click in the 'Footer' field and type the text that you want to appear in the footer.
6. Click the 'Footer Font' pull-down list and select the font you want to use for the footer.
7. Select the styles you want to use for the footer by making selections from the two 'Styles' pull-down lists.
8. Click 'Save' on the Rep Firm input form to save your changes.

6

Configuring Custom Fields

In this chapter:

Introduction

The Contacts table in PowerTrax Pro is designed to store the type of Contact information that is commonly used by most organizations: contact names, addresses, phone and fax numbers, and so on. However, many organizations have additional information requirements that are unique to their situation. A company that deals with foreign clients might want to keep track of currency exchange rates. Another company might want to store data about their clients' birthdays.

The Contacts table contains 18 fields that you can customize to meet the unique information requirements for your company. For example, if some of your company's customers like to be contacted by phone while others prefer e-mail, you can configure a custom field to be a 'Contact by' field. The person filling out the customer information can then enter the customer's preferred method of contact in that field.

The custom fields can be found by opening a Contact record and clicking the 'Custom Fields' Tab on the input form.

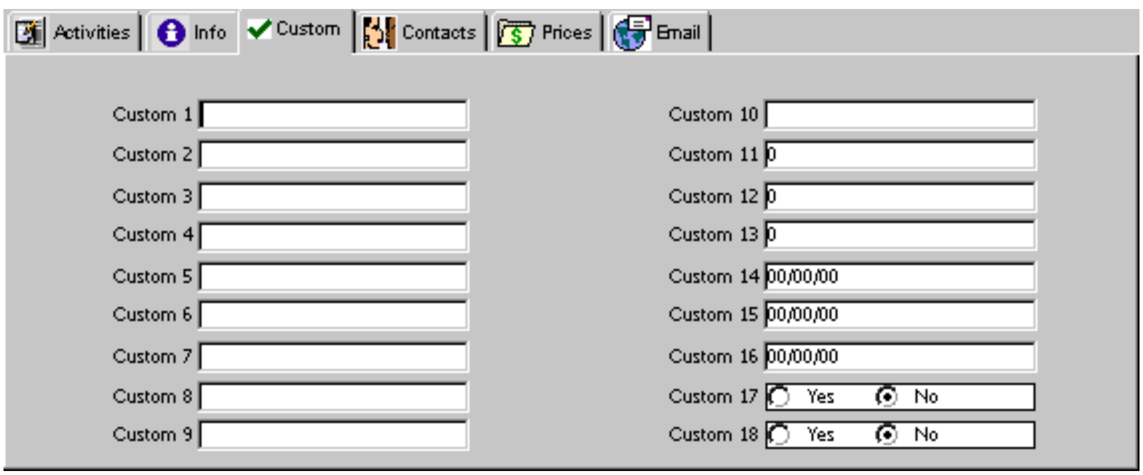


Figure 6-1: Custom Fields Tab

Data Types

Different types of fields in PowerTrax Pro are configured to hold different types of data. For example, a date field is configured to hold date values, a text field is configured to hold textual values and so on.

The 18 custom fields are separated into the following data types:

- **Text** (fields 1 - 10). Text fields can hold information such as a company name, an address, a comment, or a memo. Users can enter any letter, number, or symbol from the keyboard into a text field.
- **Number** (fields 11 - 13). Use the number field type to store number values.

- **Date** (fields 14 - 16). Use the date field type to store date values. The default display format for custom date fields is 00/00/0000. This means that the date December 7, 1963 would be displayed as 12/07/1963.
- **Yes/No** (fields 17 - 18). The Yes/No field type stores values that are True or False. These fields appear as radio buttons that can be clicked on or off.

If you're planning to use the custom fields feature, make sure the field you customize is of the appropriate data type for the information you want it to hold. For example, if you want a custom field to hold a birth date, you would customize one of the Date fields rather than one of the Text or Number fields.

Configuring a Custom Field

As with all administrative functions, you must be logged into PowerTrax Pro as the Administrator in order to configure the custom fields.

1. After logging in as the Administrator, choose **File > File Preferences** from the menu bar. The File Preferences dialog appears, showing a list of the custom fields.

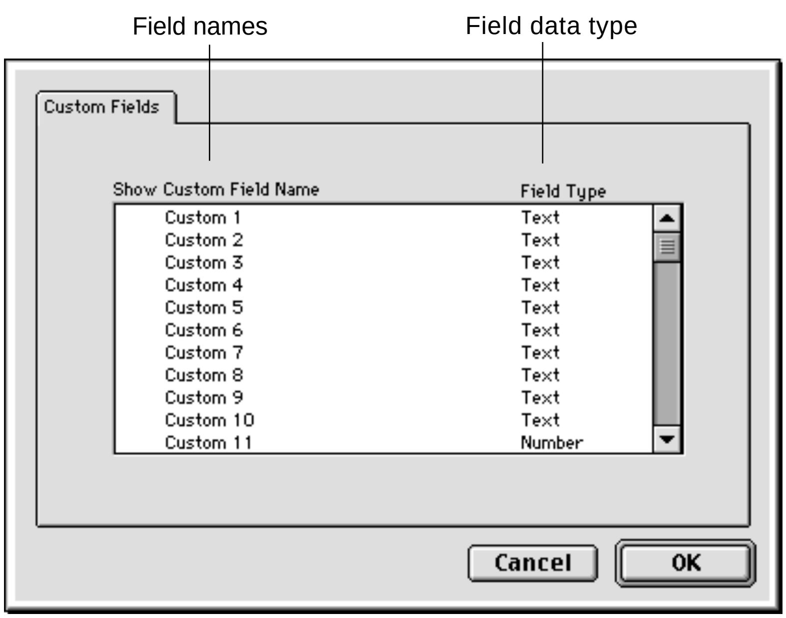


Figure 6-2: File Preferences Dialog

The column on the left side shows the names of the fields. This is the field attribute that you can customize. The column on the right shows the data type assigned to each custom field. The data type for each field is static and cannot be changed.

Naming a Field

Initially, each custom field has a generic name such as Custom 1, Custom 2, and so on.

To specify a field name:

1. Double-click the field name in the list. An input form appears allowing you to enter a name for the custom field.

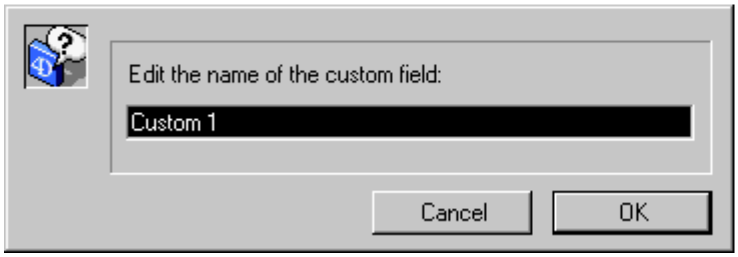
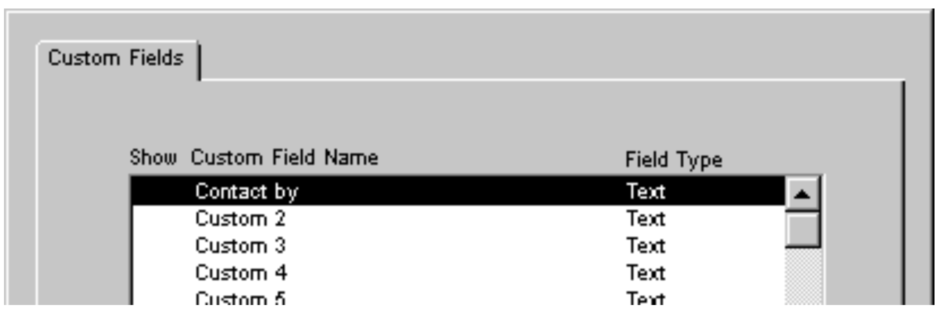


Figure 6-3: Naming a Field

2. Enter a name for the field, then click ‘OK.’ The new field name appears in the list of custom fields.



3. Repeat this procedure for any other custom fields that you want to configure, then click ‘OK’ to dismiss the File Preferences dialog.

Now, if you open a Contact record and click the ‘Custom Fields’ Tab, you’ll see the results of the changes you made on the File Preferences dialog.

New custom field name

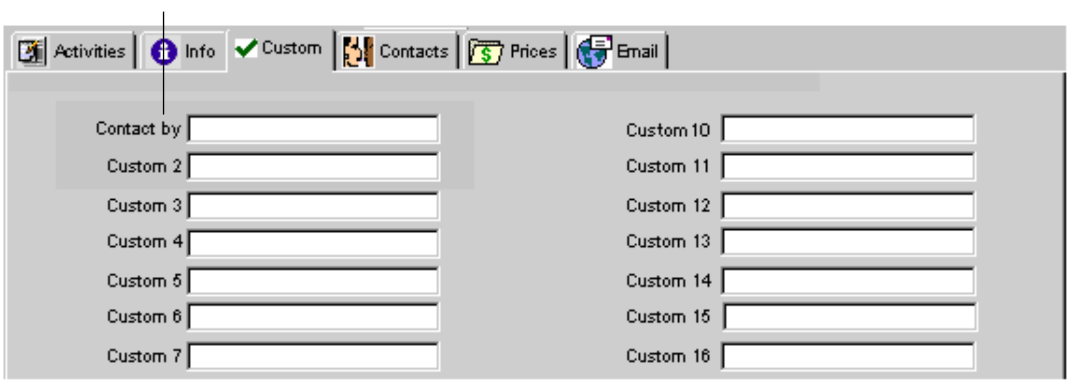


Figure 6-4: New Custom Field

7

List Management

In this chapter:

Introduction

PowerTrax Pro provides numerous features that make data entry tasks easier. One of these features is the use of choice lists for fields that always hold one of several common values. For example, when a user fills out an order form, the 'Ship per' field will usually be filled in with 'FedEx,' 'UPS,' 'Mail,' and so on. Instead of typing the shipping method each time, the PowerTrax Pro user can select one of those entries from a list of choices.

In PowerTrax Pro, the presence of a choice list is indicated by a small black triangle to the right of a field.

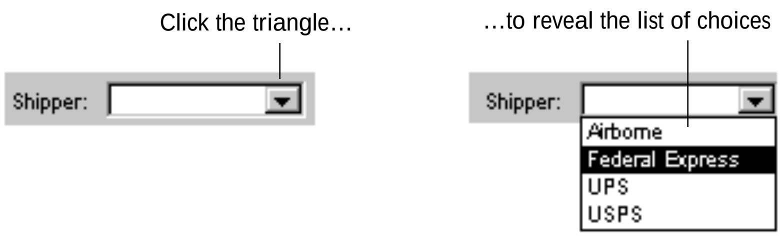


Figure 7-1: Displaying a Choice List

The choice lists that are built into PowerTrax Pro are designed to be generic so that they are applicable to most rep agencies. For example, the choice list for the 'Salutation' field on a Contact input form contains the choices "Mr.' 'Mrs.' 'Miss' and 'Dr.', while the choice list for the 'Contact Type' field contains the choices 'Customer' and 'Prospect.'

Not all the built-in choice lists will be appropriate for every rep agency, so PowerTrax Pro allows the Administrator to customize the choice lists by adding, deleting, or changing existing choices.

Note You can add, delete and edit the items in any choice list, you cannot add or delete the choice lists themselves. For example, you can delete the 'Mexico' item from the 'Countries' choice list, but you cannot delete the 'Countries' choice list itself.

Customizing a Choice List

The following sections describe how to custom any choice list by adding, deleting or editing items within that list.

Accessing List Items

In order to access the PowerTrax Pro list items, you must be logged in as the Administrator.

1. Choose **File** > **Administration** from the main menu bar to display the Administration dialog.

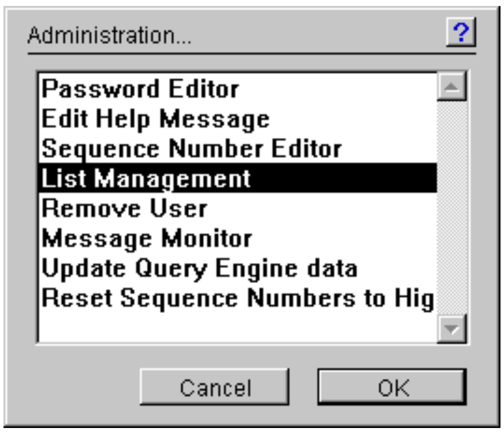


Figure 7-2: Administration Dialog

2. Select 'List Management' and click 'OK,' The Select a List dialog appears.

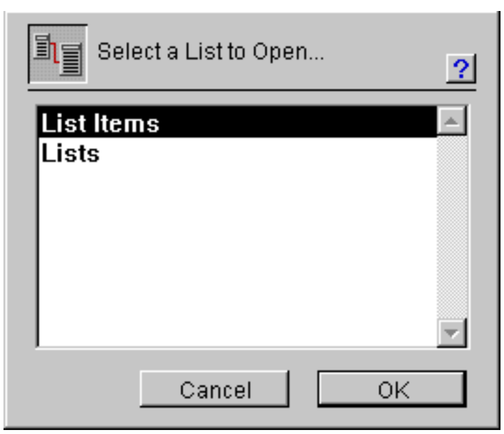


Figure 7-3: Select a List Dialog

3. Select 'List Items' and click 'OK.' PowerTrax Pro will open the List Items table and display all the current list item records.

List items are grouped together by their parent list. The illustration on the following page shows the five item for the 'Address Type' list, grouped together.

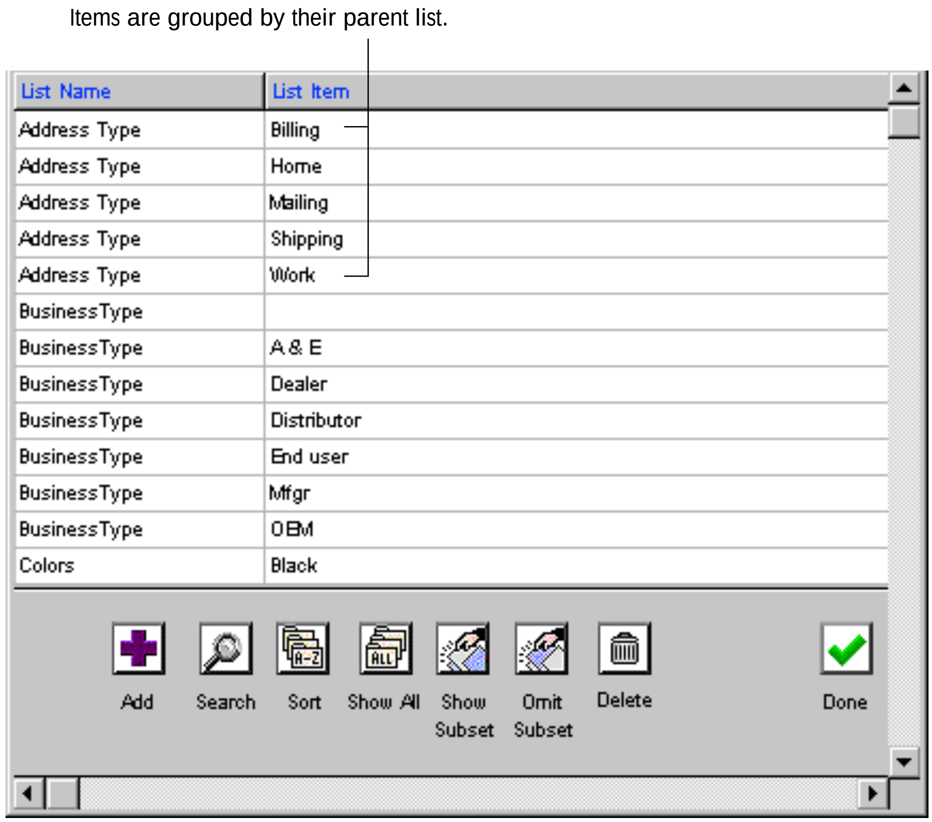


Figure 7-4: List Item Records

Editing an Existing Item

To edit an existing item:

1. Double-click the item in the list of item records. The List Item input form appears.
2. Press your Tab key once to highlight the ‘List Item’ field.
3. Enter the new item name, the press Tab again to update.

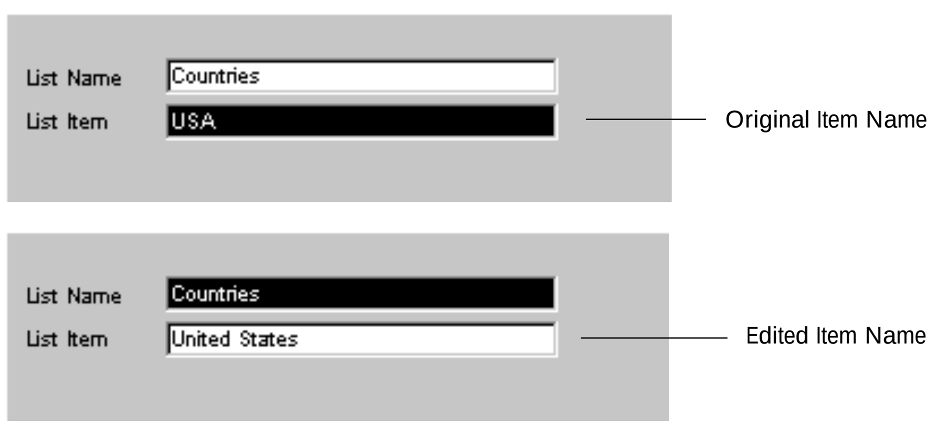


Figure 7-5: Editing an Item

4. Click the ‘Save’ button on the List Item input form to save your changes.

Adding a List Item

To add a new item to an existing choice list:

1. Make sure the List Item table is open, then click the ‘Add’ (+) button at the bottom of the List Items screen. A blank List Item input form appears.

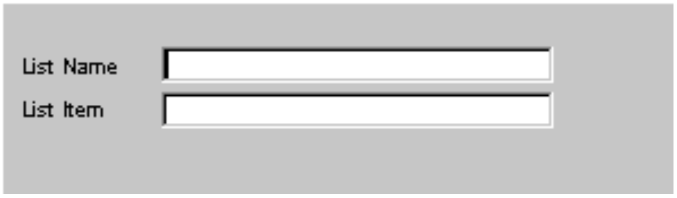


Figure 7-6: List Item Input Form Detail

2. Enter the name of the parent list in the ‘List Name’ field, then press Tab. For example, if you’re adding a new item to the ‘Countries’ choice list, enter ‘Countries’ in the ‘List Name’ field.

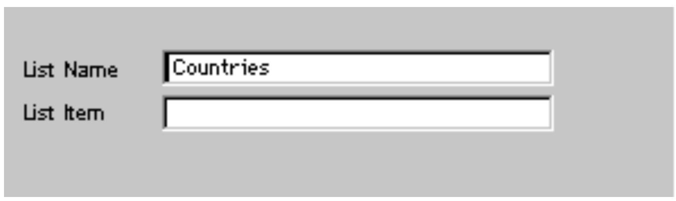


Figure 7-7: Entering the List Name

3. Enter the name of the new choice item in the ‘List Item’ field and press Tab. For example, if you want to add ‘France’ to the ‘Countries’ choice list, enter ‘France’ in the ‘Name’ field.

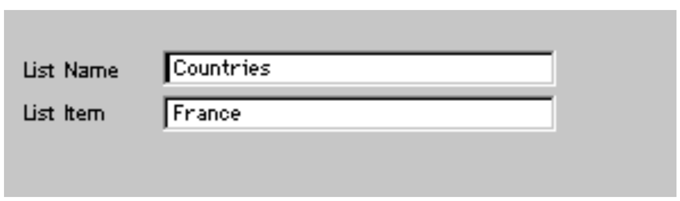


Figure 7-8: Entering the Item Name

4. Click the ‘Save’ button on the List Item input form to save the new item.

Deleting an Item

To delete an existing list item:

1. Open the List Items table, then select the item you want to delete by clicking it <u>once</u>.
2. With the item selected, click the ‘Delete’ button at the bottom of the List Items screen. Power-Trax Pro will ask you to confirm that you want to delete the selected item.
3. Click ‘Yes’ to delete the item.

8

Importing & Exporting Data

In this chapter:

Importing Data

PowerTrax Pro allows you to import data from a delimited Windows file. This is particularly useful when you have a lot of existing information that you want to add into your PowerTrax Pro database. For example, if you attended a trade show and used a card swipe machine to gather hundreds of contact names and phone numbers in a delimited text file, you can use the Import feature to bring that information quickly into PowerTrax Pro rather than having to re-key all the information manually.

To import a delimited Windows file into PowerTrax Pro:

1. Open the table that you want to import data into, then choose **File > Import** from the PowerTrax Pro menu bar. The Import dialog appears.

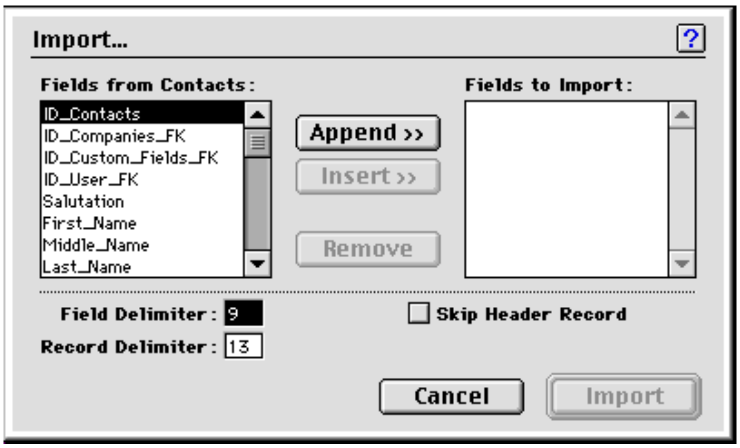


Figure 8-1: The Import Dialog

The Import dialog is used to specify the fields to import into (in the proper order), and the delimiters used in the Windows file.

Selecting the Import Fields

The ‘Fields from <tablename>’ area displays a list of all of the visible fields in the current table which can be used during the import.

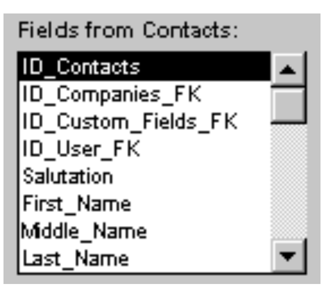


Figure 8-2: Fields Available for Import

2. Highlight each field to be imported and click on the ‘Append’ button. For example, if the file you are importing contains the fields ‘First Name,’ ‘Last Name’ and ‘Email Address’ you would select the ‘First Name,’ Last Name,’ and ‘Email’ fields from the list. Each field you select will appear in the “Fields to Import” list.

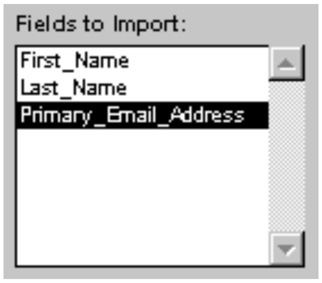


Figure 8-3: Selected Import Fields

The “Insert’ and ‘Remove’ buttons can also be used to configure the list of fields to import.

Note You cannot import into picture or subtable fields.

Setting the Delimiters

All files are imported in delimited form; each record is separated from others by a special character and, within a record, fields are separated by another special character. The default delimiters used by most applications are the Tab character (ASCII 9) for the field delimiter and the Carriage Return character (ASCII 13) for the record delimiter. Not all files use these, however, and the delimiters must be properly set for the import to function correctly.

3. In the boxes labeled “Field Delimiter” and “Record Delimiter” enter the ASCII values (between 0 and 255) that are used in the file to be imported.

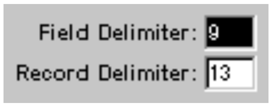


Figure 8-4: Delimiter Controls

4. If the ‘Skip Header Record’ checkbox is selected, the first record of the imported file will not be saved. This is appropriate when importing a file that contains a header record of field names.

Figure 8-5: Header Record Control

By default, the ‘Skip Header Record’ checkbox is turned off.

Starting the Import Process

5. Click the ‘Import’ button. The Import dialog appears.

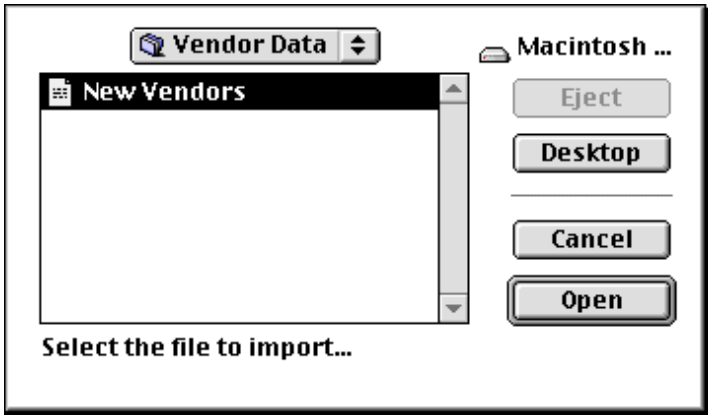


Figure 8-6: Import Dialog

6. Select the file to import, then click ‘Open.’ A progress dialog will appear showing you the progress of the import.

   If you need to stop the import process, click the ‘Stop’ button on the indicator. The import will stop but the records already imported will not be affected.

After the import is complete, the list window for the current table will display the records that were created by the import process.

Exporting Data

PowerTrax Pro’s data export feature allows you to export records as a delimited Windows file. This feature is useful for when you want to export data to another application such as a spreadsheet.

To export data from PowerTrax Pro:

1. Open the table you want to export data from, then find the selection of records that you wish to export.
2. Choose **File > Export** from the PowerTrax Pro menu bar. The Export dialog appears.

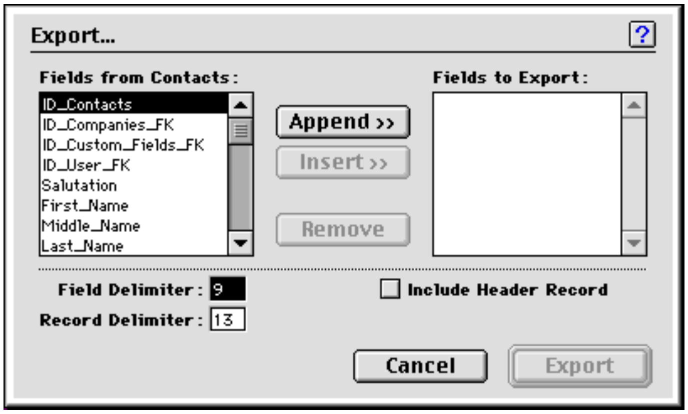


Figure 8-7: Export Dialog

The Export dialog is used to specify the fields to export (in the proper order) and the delimiters used in the exported file.

Selecting the Export Fields

The ‘Fields from <tablename>’ area displays a list of all the visible fields in the current table that can be exported.

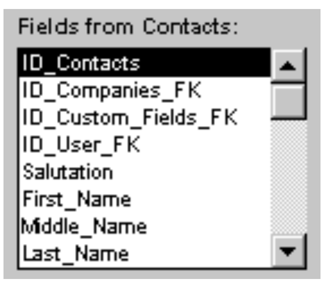


Figure 8-8: Fields Available for Export

3. Highlight each field to be included in the export (in the order you want it included) and click on the ‘Append’ button. For example, if you want to export the first name, last name and phone number of a group of contacts, you would select the ‘First Name,’ ‘Last Name’ and ‘Email’ fields. Each selected field name will appear in the ‘Fields to Export’ list.

Figure 8-9: Selected Export Fields

Note Picture and subtable fields cannot be exported into a delimited file.

Setting the Delimiters

4. In the boxes labeled ‘Field Delimiter’ and ‘Record Delimiter’ enter ASCII values between 0 and 255 as the field and record delimiters. The most common export format—the Tab character (ASCII 9) for fields and the Carriage Return character (ASCII 13) for records—is the default.

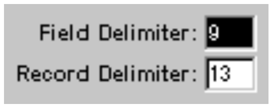


Figure 8-10: Delimiter Controls

The ‘Include Header Record’ checkbox will create a fieldname header as the first record of the export file. This may be useful when importing the data into another application such as a spreadsheet.

Figure 8-11: Header Record Control

By default, the ‘Include Header Record’ checkbox is turned off.

Starting the Export Process

5. Click the ‘Export’ button. The Export dialog appears.

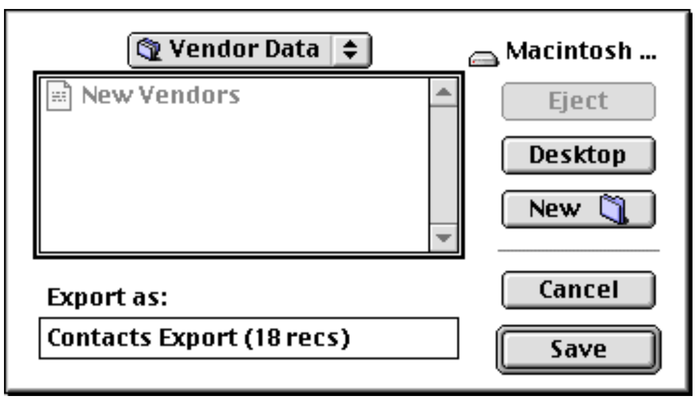


Figure 8-12: Export Dialog

6. Specify the name and location of the file you are creating, then click Save. A progress dialog will appear showing you the progress of the export.

   All records in the current selection (whether highlighted or not) will be exported in the order that they are displayed in the list window.

   If you wish to stop the export process, click the ‘Stop’ button. The export file will contain the records exported before ‘Stop’ was clicked.

9

Other Tasks

In this chapter:

The Administration Dialog

In addition to the commands described in earlier chapters of this manual, the Administration dialog also contains a variety of other commands that the Administrator can execute to perform minor maintenance of the PowerTrax Pro application. For example, if you receive an update to your PowerTrax Pro application, the Administrator should perform a maintenance task called ‘Update Query Engine Data.’ This task updates PowerTrax Pro’s search engine so that it will be able to search any new fields or tables that might have been added to the latest version.

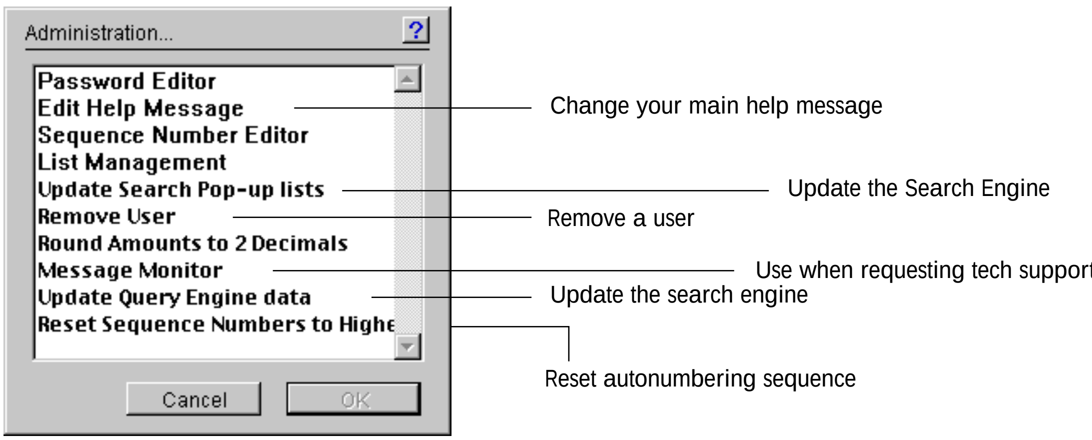


Figure 9-1: Miscellaneous Administrative Tasks

The following sections describe the ‘maintenance’ type commands on the Administration dialog.

Edit Help Message

When a user requests PowerTrax Pro’s built-in help system, the main Help dialog appears.

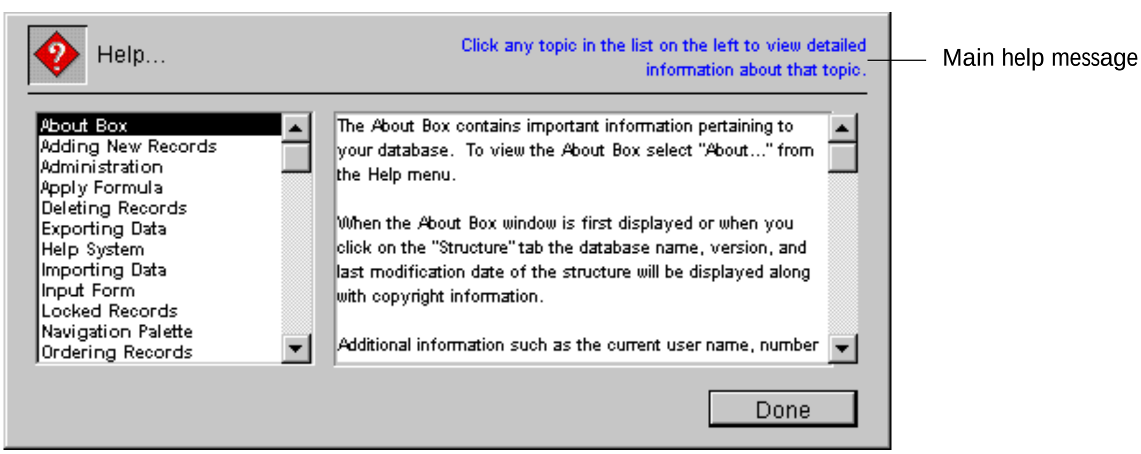


Figure 9-2: Help Dialog

The top right corner of the Help dialog displays a message giving the user brief instructions on how to use the Help system. The Edit Help Message command on the Administration dialog allows the Administrator to change that message.

To change your main Help message:

1. Choose **File > Administration** from the main menu bar to display the Administration dialog.
2. Select ‘Edit Help Message’ and click ‘OK.’ The Edit Help Message dialog appears.

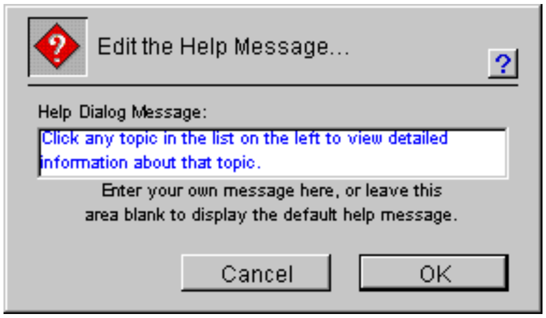


Figure 9-3: Edit Help Message Dialog

3. Enter your custom Help message, then click ‘OK.’

Remove User

For security reasons, if a member of your company leaves your employ, or is not required to use the PowerTrax Pro application any longer, the Administrator should remove that user from the PowerTrax Pro database.

To remove a user from PowerTrax Pro:

1. Choose **File > Administration** from the main menu bar to display the Administration dialog.
2. Select ‘Remove User’ and click ‘OK.’ The Remove User dialog appears.

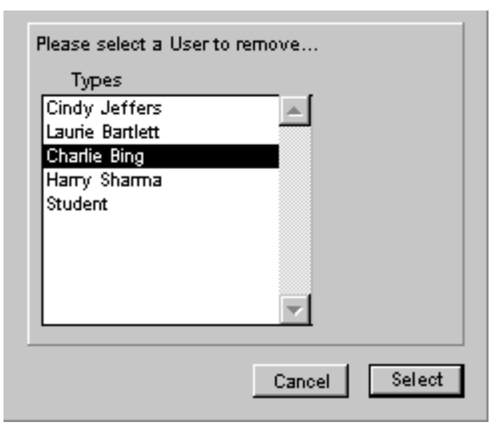


Figure 9-4: Remove User Dialog

3. Click the name of the user you wish to remove, then click ‘Select.’ PowerTrax Pro will ask you to confirm your action before removing the user from the database.

Message Monitor

PowerTrax Pro can generate internal messages that help Soft Solutions' technical support staff to diagnose any problems that might occur.

If you experience a problem while using PowerTrax Pro and require technical assistance, the Soft Solutions technician might ask you to display the Message Monitor.

To display the Message Monitor:

1. Choose **File > Administration** to display the Administration dialog.
2. Select the Message Monitor command, then click 'OK.' The Message Monitor window appears.

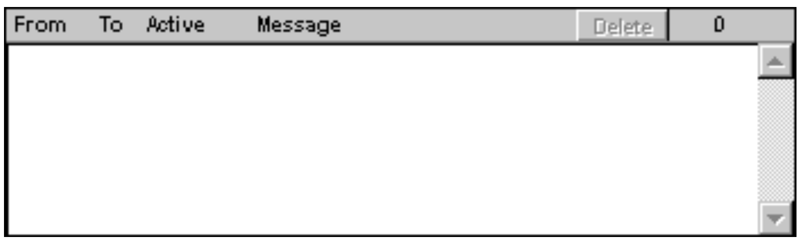


Figure 9-5: Message Monitor Window

The Soft Solutions technical support representative will give you further instructions as required.

Update Search Pop-up Lists / Update Query Engine Data

When you install an update to your PowerTrax Pro application, the Update Search Pop-up Lists and Update Query Engine Data commands are used to update PowerTrax Pro's search engine.

When you search on a field that uses a pop-up list, the list of choices appear in the search editor window so that you can select a search value. If any new choice lists have been added to the database, the Update Search Pop-up Lists command will add those lists to the search engine.

If any new fields or tables have been added to the database, the Update Query Engine Data command will add those fields and tables to the PowerTrax Pro search engine.

Note The Update Search Pop-up Lists and Update Query Engine Data commands should only be used under the supervision of a qualified Soft Solutions technical support representative.

Reset Sequence Numbers

If a problem occurs with the automatic numbering system for your quotes, purchase orders and invoices, you might need to use the Reset Sequence Numbers command to correct the problem.

Note The Reset Sequence Numbers command should only be used under the supervision of a qualified Soft Solutions technical support representative.

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