

## CONNECTIONS 2005

### Tracks Questions and Answers

Q: Is there a way to print one receipt (using a thermal printer) for a sale? We throw away the duplicate receipt in almost all cases, killing trees and increasing cost.

A: You bet! When using the CBM1000 printer (Thermal), we have added a "number of copies" field. Simply go to Management/Customize/Workstation Settings. On the Hardware tab, you'll see the option just under the Receipt Printer Type.

Q: Session T6- 4/7/05: Regina said that we can copy formats, for instance, for label set-ups from another school. The button was "import from another school." So if we want a label set-up that another bookkeeper at another school has, how do we access that school? One of our bookkeepers within our district has been using BB and Tracks for a year and we are new. How can we import her set-ups (saving us time)?

A: Get a backup of her data. Create a new school in your Tracks and restore her backup to it. Now when you are on a screen that allows you to Import from Another School, you can choose her school.

Q: On the Import from Tracks screen, can you change it back so that I can highlight a number of entries and change them from Detail to Summary at the same time. Now I have to go line by line and if I have 50 AP tests, that takes a lot of time.

A: Detail/Summary request. Can be done by using the Windows shortcut. Hold down the "Shift" button to highlight lines in sequential order. Or hold down the "Control" button to highlight lines in random sequence. Feel free to call Support if you are not familiar with these shortcuts.

Q: Import from Tracks – another question. Also if you summarize entries, can they post as what that item is, for example "Yearbook" instead of "Tracks Sales?" It confuses my advisors. They think money from Girls or Boys Track account when into their account no matter HOW MANY times I explain that Tracks in the name of my receipt program.

A: We'll add an Enhancement Request to allow for summarizing by Item Number also. We think will address this issue. This will probably be a new option.

Q: Balance Due Letters. Option to select how you want to select your student, ie, customer name, ID#, other ID# to print your letter.

A: Tracks currently allows you two options to choose from: Select By and Print Order. The Select By can be either Customer No or Last Name. The Print Order can be either Last Name or Zip Code. An enhancement request will be added for Other ID.

Q: I am running the student store/snack bar. Is there a way to use Blue Bear to track sales and inventory without keying/scanning student ID? Since I sell after school there is not enough time to scan each student ID that is buying a \$.50 item.

A: Sure thing! The items you are selling in the Student Store should NOT be marked as "Cust Required" in Item Maintenance. In this case you can quickly scan the sale and move on. Even one step quicker would be to mark these items as a "Sundry" so that you don't have to generate a separate receipt for each transaction. You can simply print one SUNDRY receipt right before you do your Closeout. This Sundry receipts will list all of the Sundry type items sold, along with total quantities and amounts for each item. Please call Support if you have questions with either of these options.

Q: FundRaiser. The quantity field in the Item (when on the Work Screen) will only accept up to 999. We need "thousands."

A: Congratulations! This feature is now available in Tracks 5.5!

Q: Example: We sell candy for \$1/candy bar. I receive from the advisor a deposit for CANDY for \$465.75. On the Work Screen, I can only enter 465. I then have to force the \$.75 by another line with a quantity of 1 and change the price to \$.75. It beeps at me but I can get it though. Can we somehow allow for fractions?

A: Tracks 5.5 allow you to enter the correct amount the first time.

Q: Can you add one more price field for yearbooks and print on one report? Aug-Sept: Promo Price \$60, Oct-Jan: Reg Price \$65, Jan-May: Price \$70

A: You currently get one Regular price and one Promo price per item. Your example above shows why we don't give you TWO Promo prices. See how easy it is to say "Oct to Jan" and "Jan to May"? Looks like we may have a problem there with January, doesn't it? Best thing to do is to set up a reminder to yourself to change the price at the end of December.

Q: When you use F3 to enter an item, the look up always comes up again and you have to close it. It is annoying.

A: This is now available in Tracks 5.5! Go to Management/Customize/School Settings. There is a new option to "Close Item Screen After Each Line".

Q: I have been getting conflicting information as to when I should do a year end close. I went to a Dr. Download and was told to do it in June. Then I went to SB period end and was told to wait until I get my June statement. So really should I wait until I come back for the next year and close out the previous year before I start the new year?

A: SchoolBooks and Tracks are completely independent as far as year end is concerned.

1. In Tracks, the Dr. Download procedure to load new students for next year can be done anytime after you're through with your current year. We suggest that you do it as soon as possible so that Registration Sales can begin without conflicts with last year.
2. In SchoolBooks, the Year End Process must wait until you have finished the June Bank Reconciliation. Therefore you have to wait until you have received your June bank statement before you can do the bank rec. It is suggested that you do both as soon as you can after 6/30.

Q: Could you make it possible to run a list of guest names only for a dance?

A: The sales reports always show the actual customer it was sold to, so you can't eliminate that information. If you recorded guests by selling a separate item "Guest," you can run a Sales by Item/Customer Report for just that item to get your information. If you used the Bonus field instead, you can't really separate the guest name from the Customer name on a Tracks report. We'd suggest that you Preview a Sales by Item/Customer Report with Bonus information and then Export to Excel. Then you could get rid of the additional columns and just end up with the Guests names in the Bonus column.

Q: Can our teachers have the capability to declare a book "lost" when students are checking books in at semester end? Can we have this capability soon?

A: Yes. This option already exists on the TexTrack Check In screen. If the teacher has the ability to use this screen, they should be able to mark a book as lost.