

Tracks –T17

Equipment Tracking



CONNECTIONS 2007



Agenda

- What is Equipment Tracking?
- Setting up Equipment Items.
- Issuing and returning equipment.
- Editing equipment entries.
- Inquiry and Reporting.
- Charging for lost equipment.



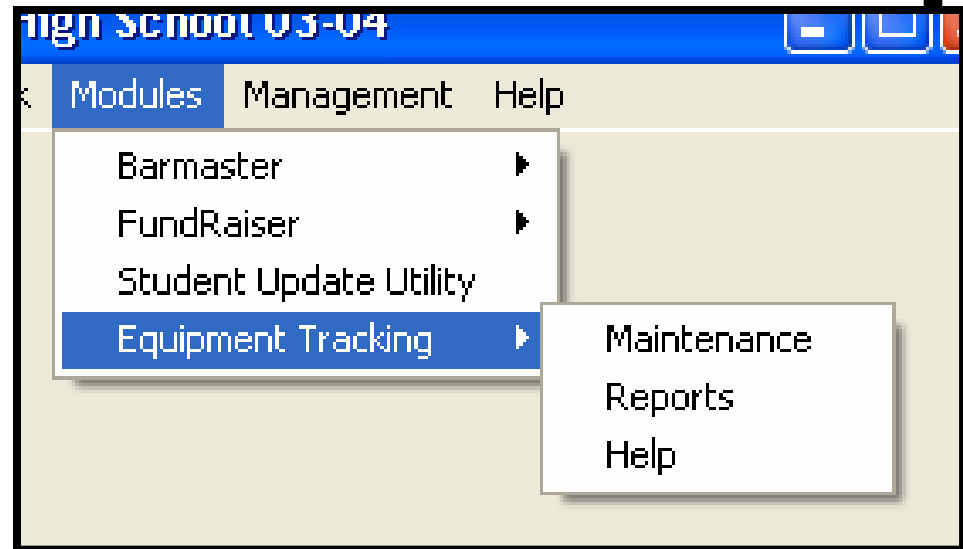
CONNECTIONS 2007



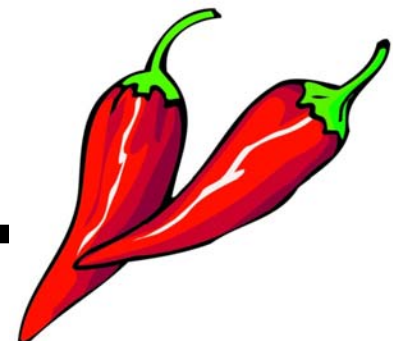
What Is Equipment Tracking?

Automates the issue and return of all kinds of equipment.

- Sports equipment
- AV equipment
- Band instruments



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Set up Equipment Items

- We expect them to be returned.
- They are “sold” with a zero dollar amt.

Item Maintenance - Play School High School 03-04

Item No. HELMET Type Equipment

Description Football Helmet Last Activity 03/26/05

1. Main | 2. Levels | 3. Additional

Cust Reqd Sundry Taxable Grade Limits Department Grouping Save History Checks OK with No Cust Print extra receipt with no price Include in Physical Count

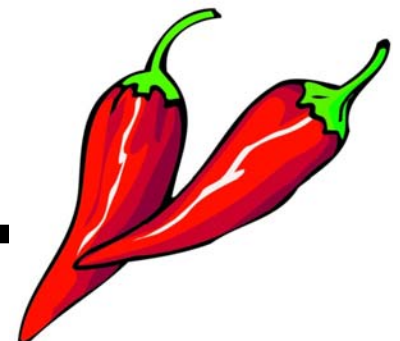
Prompt Price Price 0.00 Cost 0.00 Last Cost 0.00 Prompt Qty Quantity Limit 0 Reorder Level 0 Normal Stock 0 Qty On Hand 43 Category

Prompt GL ? GL Account 2250-00-00 ATHLETIC CLUB

Lost Charge 100.00

Accept Cancel Delete Print ?

Save All Changes ZPLAY 03/26/05



Item Maintenance - HELMET

Item Maintenance - Play School High School 03-04

Item No. HELMET

Description Football Helmet #enter number

Type Equipment

1. Main 2. Levels 3. Additional

Prompt Price

Price

Cost

Last Cost

Prompt Qty

Quantity Limit 0

Bonus Field Options

Use Bonus Field

Bonus Field is Customer ID

Bonus Label Tag #

Item Name or Description ZPLAY 03/15/05

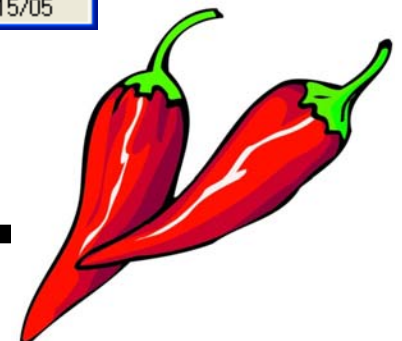
Track the Helmet number...

1) Using a pipe in the Description

OR

1) Using the Bonus field.

Type=Equipment so Tracks will know this is Equipment.



Item Maintenance - HELMET

Item Maintenance - Play School High School 03-04

Item No. Type

Description Last Activity

1. Main | 2. Levels | 3. Additional

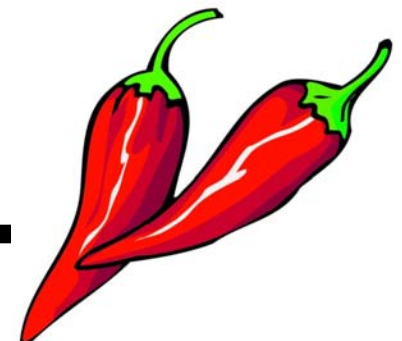
<input checked="" type="checkbox"/> Cust Reqd	<input type="checkbox"/> Prompt Price	<input type="checkbox"/> Prompt GL ?
<input type="checkbox"/> Sundry	Price <input type="text" value="0.00"/>	GL Account <input type="text" value="2250-00-00"/>
<input type="checkbox"/> Taxable	Cost <input type="text" value="0.00"/>	<input type="text" value="ATHLETIC CLUB"/>
Grade Limits <input type="text"/>	Last Cost <input type="text" value="0.00"/>	Lost Charge <input type="text" value="100.00"/>
Department <input type="text"/>	Prompt Qty <input type="checkbox"/>	
Grouping <input type="text"/>	Quantity Limit <input type="text" value="0"/>	
Save History <input type="checkbox"/>	Reorder Level <input type="text" value="0"/>	
Checks OK with No Cust <input type="checkbox"/>	Normal Stock <input type="text" value="0"/>	
Print extra receipt with no price <input type="checkbox"/>	Qty On Hand <input type="text" value="43"/>	
Include in Physical Count <input type="checkbox"/>	Category <input type="text"/>	

Navigation: [K] [Left] [Right] [End]

Buttons: [Accept] [Cancel] [Delete] [Print] [Help]

Save All Changes | ZPLAY | 03/26/05

Lost Charge
The amount to be charged if the item is lost.



Issuing Equipment

- Select a student.
- Sell the Item (the equipment being issued).

Work Screen - Play School High School (3)

F2 MENU **F3 ITEMS** **F4 CLEAR** **F5 DEL** **F6 EDIT** **F7 TAX** **F8 CUST** **F11 OPT** **F12 FAST CASH**

Name: Danson, Christopher ID: 901258
Address: 800 Butterfly Street Other ID:
City, State Zip: San Diego, CA 92568 Balance:
Phone: (619) 555-8085 Class: 12 Status: Active
Notes:
Books Out: 3

YRBK

Command Line Description Quantity Price 0 0.00

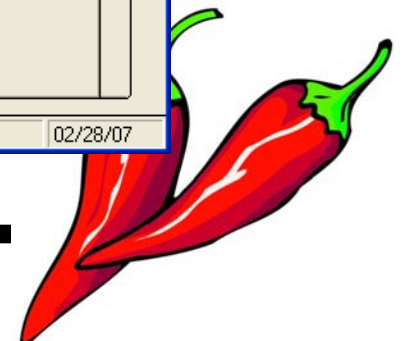
Item Number	Description	Dept	Quantity	Price	Ext Price
HELMET	B Football Helmet		1	0.00	0.00

F9 PRINT **CH HIST** **LC LAST** **NOTE** **R RET**

Detail information 0.00
Sales Tax 0.00
Total 0.00

Star Buttons 1: 1 - Yearbook, 2 - SB Card, 3 - SB Package, 4 - Donation - Sports, 5 - Prom Double
Star Buttons 2: 6 - Fine Arts Donation, 7 - Bear T-Shirt, 8 - Art Fee 3, 9 - AP English Test

Item No., Customer Number or Command ZPLAY 02/28/07



Returning Equipment

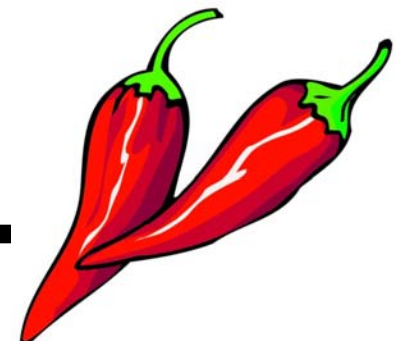
- To return one or only some of the items - Do a return.
- To return all items issued to a student - Enter "RA" for Return All.

Item Number	Description	Dept	Quantity	Price	Ext Price
HELMET	B Ftbll Helmet # 2345		-1	0.00	0.00

LI	Last Item
SUNDRY	Sundry
P	Post/Pre-Payments
RP	Reprint last receipt
AC	Add a New Customer
EO	Equipment Out
RA	Return All Eq for Cust
/C	Comment Line



CONNECTIONS 2007



Editing Equipment Entries

- To correct an error or change a date in a student Equipment record.
- Browse through all the Equipment records for a selected student to change or delete records.

Equipment Maintenance - Tracks Plus ZPLAY School

Customer No. 901258 Danson, Christopher

Sequence No. HELMET 00001

Item No. HELMET Football Helmet #enter number

Description Football Helmet #525

Issued

Receipt No. 0000111

Date 03/15/05

Time 14:33

Bonus Label Tag#

Description 525

Returned

Receipt No.

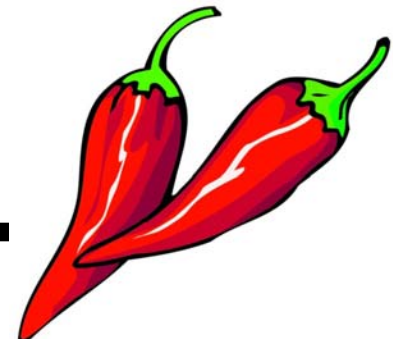
Date

Time

Equipment Tracking Maintenance Reports

Accept Cancel Delete

ZPLAY 03/15/05



Equipment Out Inquiry

- What does Christopher have checked out?
- On the Work Screen, bring up student, type “EO”

The screenshot displays a software interface for a school. The main window is titled "Work Screen - Play School High School 03-04". It features a top navigation bar with function keys: F2 MENU, F3 ITEMS, F4 CLEAR, F5 DEL, F6 EDIT, F7 TAX, F8 CUST, F11 OPT, and F12 FAST CASH. Below this, there are fields for student information: Name (Danson, Christopher), ID (901258), Address (800 Butterfly Street), City, State Zip (San Diego, CA, 92568), and Phone. A student photo is visible on the right. There are also buttons for "1 - Yearbook" and "2 - Student Body Card".

An "Options" dialog box is open, listing various actions: LI Last Item, SUNDRY Sundry, P Post/Pre-Payments, RP Reprint last receipt, AC Add a New Custom, **EO Equipment Out** (highlighted with a red circle), RA Return All Eq for C, and /C Comment Line.

An "Equipment Out" dialog box is also open, showing a table with the following data:

Item No	Description	Date Out	Time	Receipt
HELMET	Football Helmet	07/03/03	09:47	0000158

At the bottom of the "Equipment Out" dialog, there is a "Charge LDST" button and a "Continue" button. The status bar at the bottom of the main window shows "ZPLAY 02/15/05".



Equipment Reporting

T Equipment Report - Tracks Plus ZPLAY School

Sort By: Customer Include Bonus Field Info:

Selection: All Starting: Ending:

Date: 03/15/05

Item Number:

Customer Number:

Remember settings:

Equipment History By:

Play School High School 03-04

EQUIPMENT REPORT BY CUSTOMER

All Dates
All Items
All Customers

Checked Out			Checked In			Item Number	Description
Date	Time	Receipt No	Date	Time	Receipt No		
Customer No: 901244 - Edwards, Jaime							
09/24/04	17:21	0001125				HELMET	Football Helmet #201
Customer No: 901249 - Cruise, Tim							
09/24/04	17:21	0001124				HELMET	Football Helmet #113
Customer No: 901251 - Sanders, Bill							
09/24/04	17:21	0001126				HELMET	Football Helmet #107
Customer No: 901258 - Danson, Christopher							
03/14/05	15:19	0000102				HELMET	Football Helmet #304

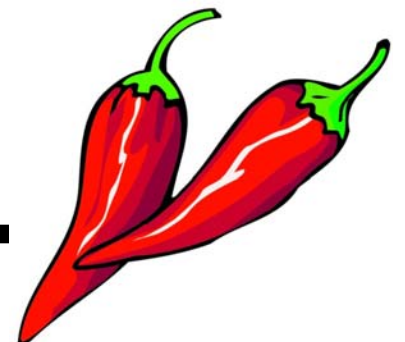


Charging for Lost Equipment

- Make sure there is an amount in “Lost Charge” in Item Maintenance.
- Select a Customer on the Work Screen.
- “EO” for Equipment Out.
- Select the Item(s) to be charged.
- Click “Charge LOST” button.

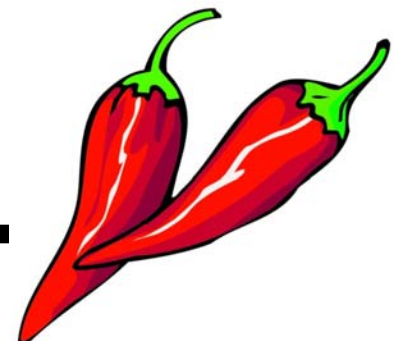
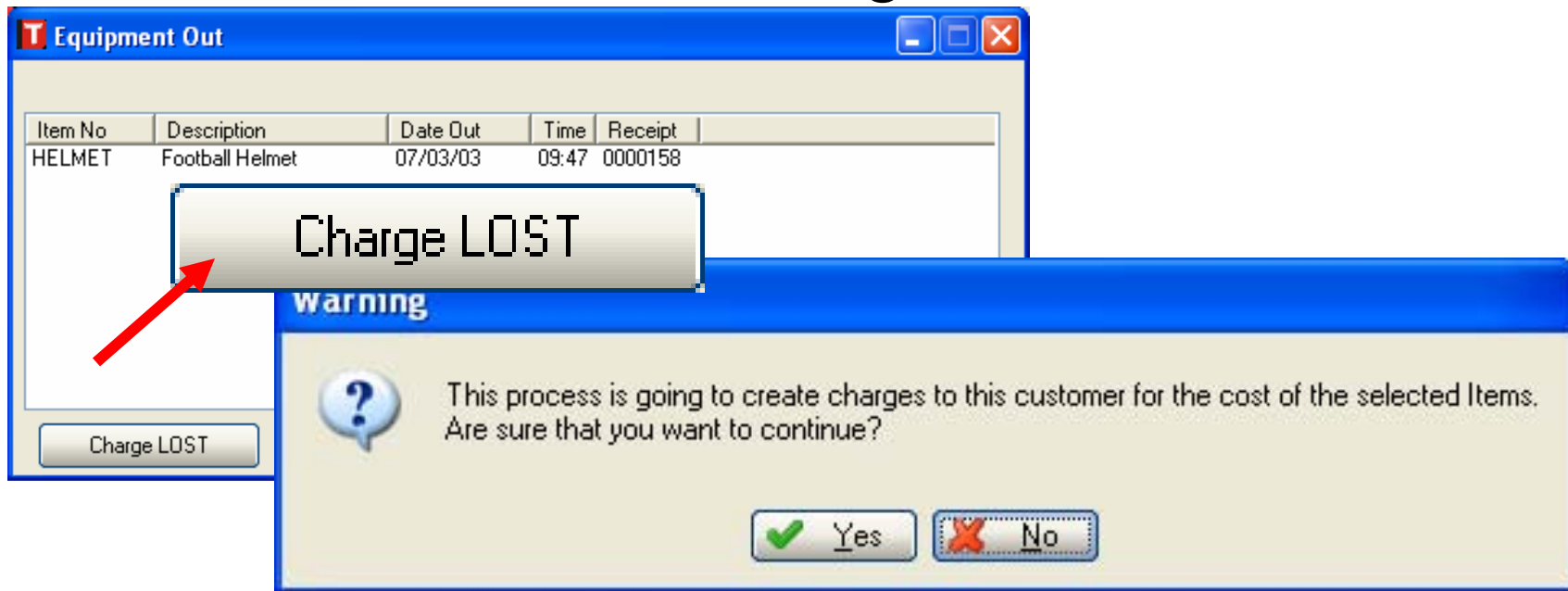


CONNECTIONS 2007



Charging for Lost Equipment

- Warning Message will display
- Tracks creates a charge on account.



Paying for Lost Equipment

T Work Screen - Play School High School 03-04

F2 MENU F3 ITEMS F4 CLEAR F5 DEL F6 EDIT F7 TAX F8 CUST F11 OPT F12 FAST CASH

Name: Danson, Christopher ID: 901258
 Address: 800 Butterfly Street Other ID:
 City, State Zip: San Diego, CA 92568 Balance: **100.00**
 Phone: (619) 555-8085 Class: 2005 Status: Active
 Notes:

Star Buttons 1

- 1 - Yearbook
- 2 - Student Body Card
- 3 - AP Biology Test
- 4 - AP English Test

Command Line: P

Item Number:

F9 PRINT CH HIS

Item No., Customer

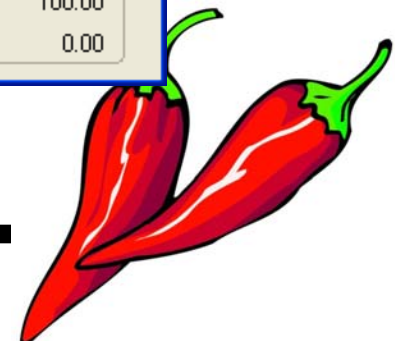
T Payments Information

901258 - Danson, Christopher 0.00

Receipt	Date	Item No./Description	Amount	Due	Amount Paying
0001103	03/30/05	Football Helmet	100.00	100.00	0.00

Lookup Quit Clear Pre-Pay F9 Done

Total Amount: 100.00
 Total Due: 100.00
 Total Paying: 0.00



Let's Walk Through It! Or Questions & Answers



CONNECTIONS 2007

