

Tracks – T13

Tracks System Startup



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Agenda

- System Startup Checklist
- Setup options
- Importing student data
- Customer Maintenance
- Item setup
- How to make a sale

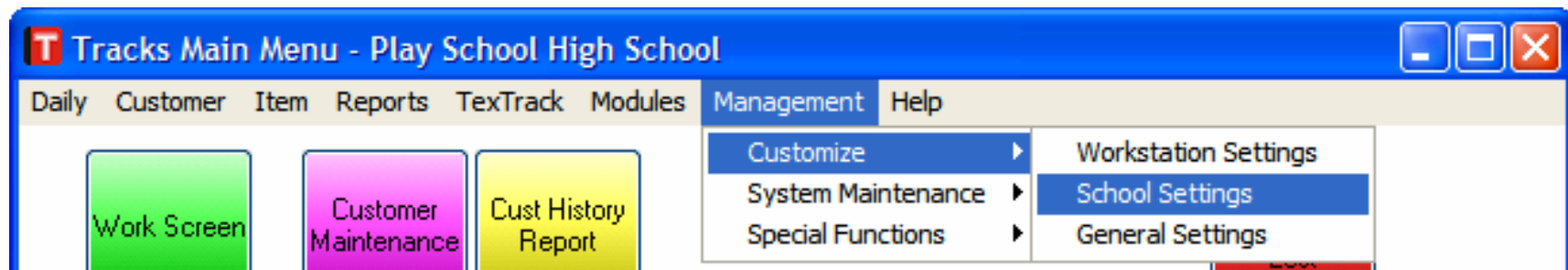


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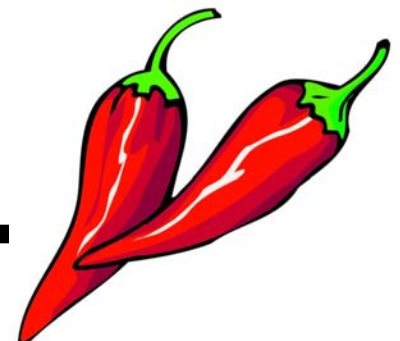


Setup Options

- Go to Management, Customize, School Settings.



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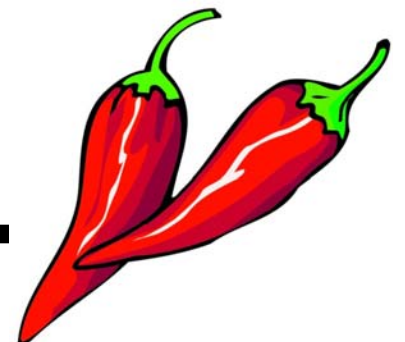


System Startup Checklist

- Set up POS Equipment. Test it!
- Create your school in School Maintenance.
- Customize options in School Settings.
- Set up or Import your GL accounts.
- Import/Set up your Customers.



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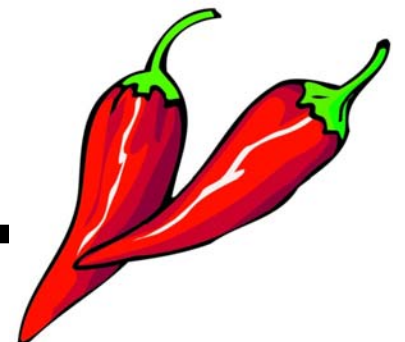


System Startup Checklist

- Set up your Items.
- Set up security for your system.
- Start selling!
- Whenever you make a deposit at the bank, do a Closeout in Tracks.
- For a more detailed checklist, see Chapter 1 in Tracks Help.

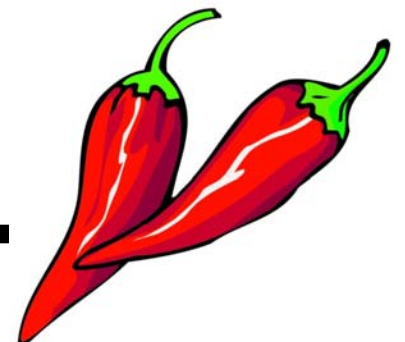


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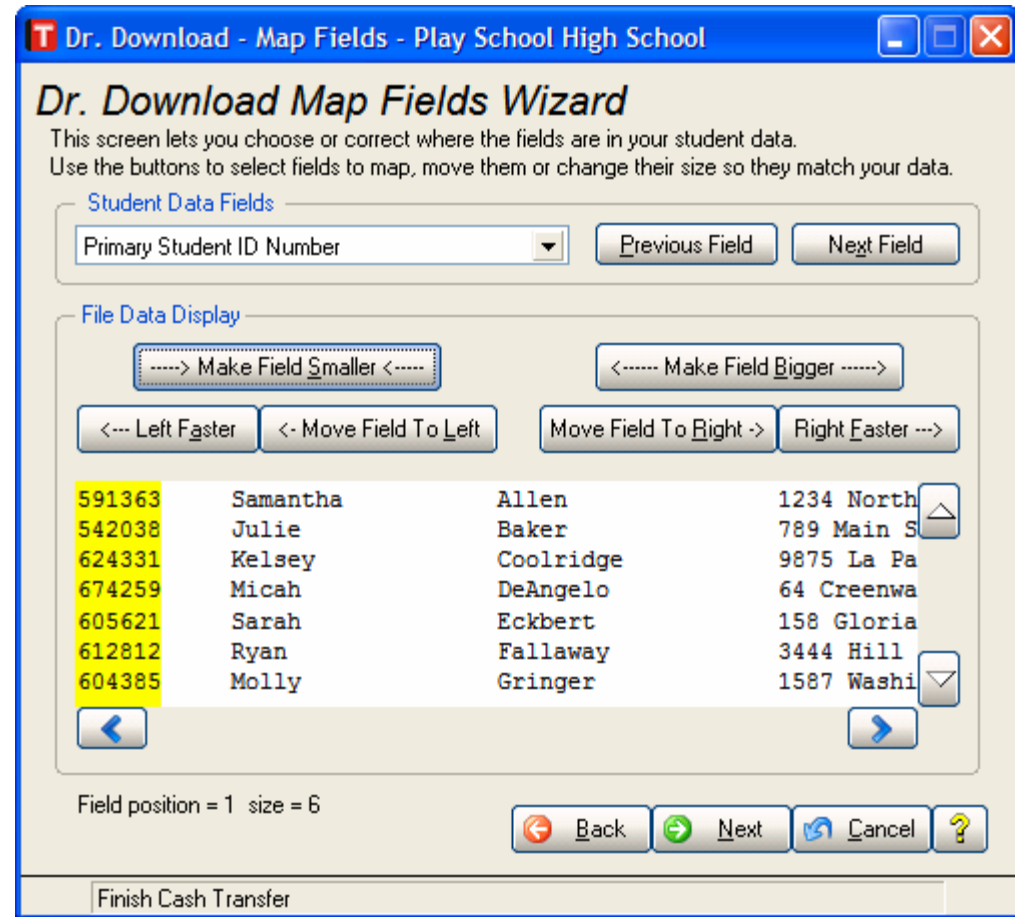
Importing Student Data

- Get the Student Data file in the correct formation (see Tech Tip #116 on our website).
- Use Dr. Download only one time a year.
- Throughout the year, use Student Update Utility.

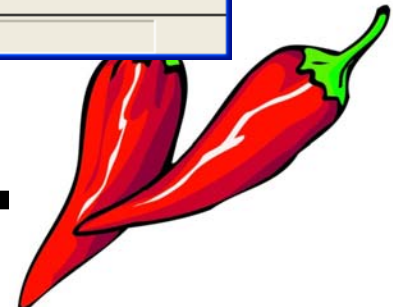


Importing Student Data

- Map the fields for your student data.



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Customer Maintenance

- View or edit customer data in Customer Maintenance.

Customer Maintenance - Play School High School

Customer No. 901253

First Name Bella Last Name Banu Middle

1. Main | 2. Parents | 3. Contacts | 4. History | 5. Additional | 6. Schedule | 7. Charges

Address 222 Hummingbird Lane

City San Diego

State CA Zip Code 92568

Telephone (858) 555-4650

Birthday Ethnicity

Year/Class 12 Gender

Type Student

Notes No dances!

Emergency

Emg Phone

No Checks? Status Active

Date of Last Status Change

GL Account

Price Level A Locker No.

Balance .00

Driver Lic.

GPA .0000

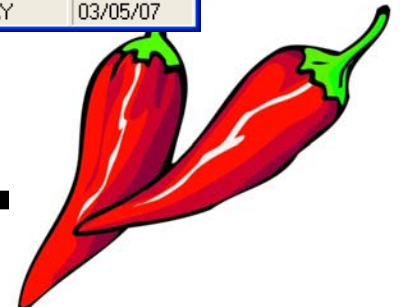
Demerits .00

Soc Sec No.

Hold on Textbooks

Navigation: Show Student, Accept, Cancel, Delete

Status: ZPLAY 03/05/07



Creating Items

- In Item Maintenance
- Required:
 - Item Number
 - Description
 - Type

Item Maintenance - Play School High School

Item No. YRBK Type Service

Description YEARBOOK Last Activity 10/05/06

1. Main | 2. Levels | 3. Additional

Cust Reqd Cash Only

Sundry

Taxable

Grade Limits

Department SB

Grouping

Save History

Checks OK with No Cust

Print extra receipt with no price

Include in Physical Count

Special Functionality

Prompt for Price

Price 60.00

Cost 0.00

Last Cost 0.00

Prompt for Quantity

Quantity Limit 0

Reorder Level 0

Normal Stock 0

Qty On Hand 0

Prompt for Category

Category

Prompt GL ?

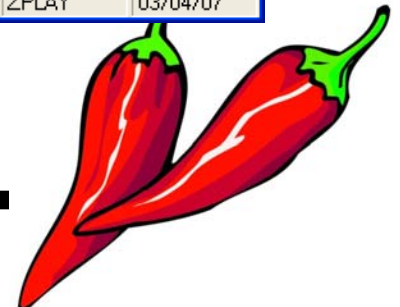
GL Account

4105-40-00

Yearbook ~ Sales

Accept Cancel Delete ?

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Creating Items

- Enter pricing on the Levels tab.

Item Maintenance - Play School High School

Item No. YRBK Type Service

Description YEARBOOK Last Activity 10/05/06

1. Main | 2. Levels | 3. Additional

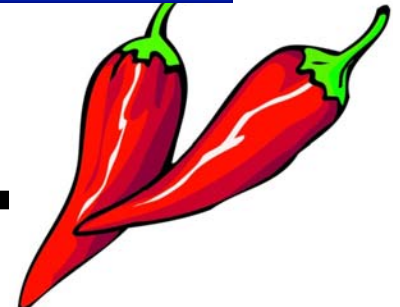
Level	Type	Price	Starting Date	Ending Date
A	Regular	60.00		

Level Type Price Starting Date Ending Date

A	Promotion	50.00	07/01/06	10/31/06
A	Regular	60.00		
B	Promotion	45.00	07/01/06	10/31/06
B	Regular	50.00		

Accept Cancel Delete ?

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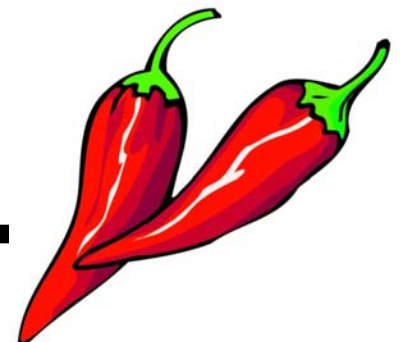


Making a Sale

- Make sales on the Work Screen
- Simple sale:
 - Bring up a customer
 - Bring up an item
 - F9 to print a receipt and complete the sale



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Making a Sale

T Work Screen - Play School High School

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

Name: Banu, Bella ID: 901253
 Address: 222 Hummingbird Lane Other ID: 12444
 City, State Zip: San Diego, CA, 92568 Balance:
 Phone: (858) 555-4650 Class: 12 Status: Active
 Notes: No dances! **YRBK**
 Books Out: 0

Command Line Description Quantity Price
 _____ 0 0.00

Item Number	Description	Dept	Quantity	Price	Ext Price
YRBK	YEARBOOK		1	60.00	60.00

F9 PRINT CH HIST LC LAST NOTE R RET ?

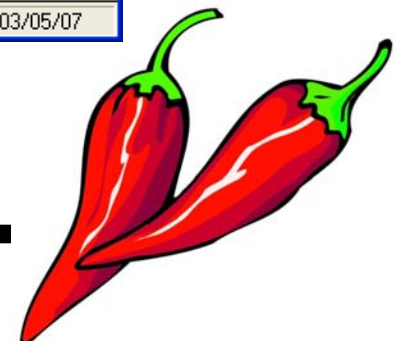
Sub-Total: 60.00
 Sales Tax: 0.00
 Total: 60.00

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

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Closeout

T Closeout Wizard Summary Screen - Play School High School

Sales Summary	
Taxable sales	0.00
Non-taxable sales	5,605.00
Total sales before tax	5,605.00
Sales tax	0.00
Total sales with tax	5,605.00

Expected Payments Summary	
Cash	3,000.00
Checks	2,605.00
Credit cards	0.00
Total payments	5,605.00

Actual Payments Summary	
Cash	3,000.00
Checks	2,605.00
Credit Cards	0.00
Total Payments	5,605.00

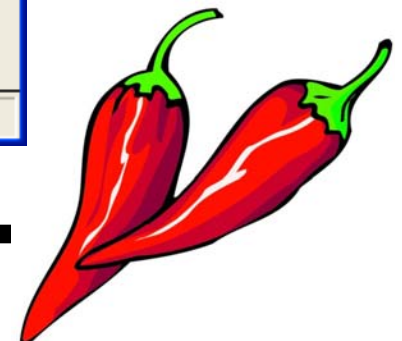
Closeout Comments

Back Next Cancel ?

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Let's Walk Through It! And Questions & Answers



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