



February 9th, 2002

This file contains information on Customer Tracker 2.x by Kevin VanStrien. If you have questions about this software not covered in this pdf file, please send me an email at [kevin@kagi.com](mailto:kevin@kagi.com). Thanks for using Customer Tracker!

## About/History

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Customer Tracker originally began as "Work Tracker", but never made it to release under that name. Work Tracker was originally planned to keep track of jobs done for customers and print work logs for them. However I quickly realized the convenience of having the same program also do invoices and more.

Having started as a program for my own needs and never actually intended for release, version 1.x had some problems with things being too customized to the way I did things, and my particular setup. However, with 2.x, that has now changed. Just a few of the changes include Better print options, Job Timer, Credit/Debit system (instead of checking off paid entries, which didn't allow partial payments from customers then), a slightly revised interface, and basically an overhaul of the inner working and file system.

I hope you enjoy using Customer Tracker and as always I welcome your comments, and suggestions. You may also submit new feature suggestions from the Customer Tracker Web site at [www.10end.com/customertracker](http://www.10end.com/customertracker)

Thanks again,  
Kevin VanStrien

## Thanks

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My thanks goes to all of those who downloaded the beta test versions and help finish and iron out the bugs in version 2.0!

A special thanks to my brother, Greg VanStrien, for helping me do some debugging and beta testing on this program as I wrote it.

This program was compiled for PowerPC, 68k machines, and a FAT version for both. If you have the wrong version, you may get the right one from [www.10end.com/customertracker](http://www.10end.com/customertracker)

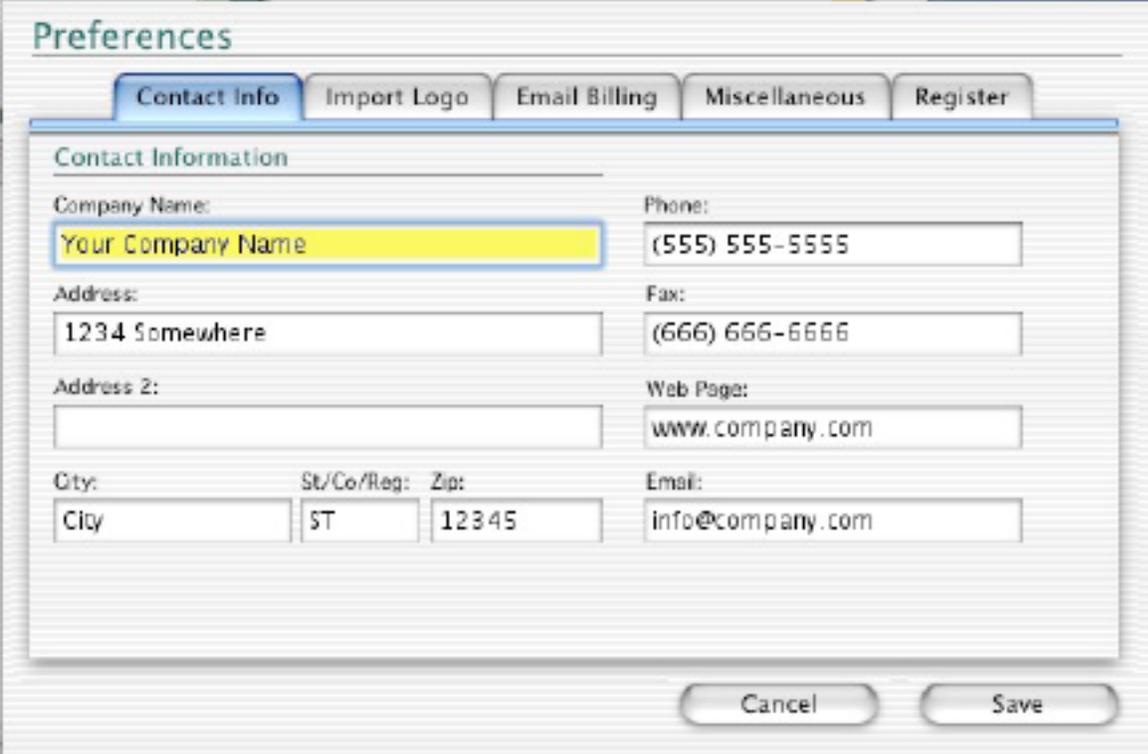
If you have a computer that Customer Tracker does not function on, please let me know by email with a description of the problem and I will see if I can correct it and send you a updated version.

## Using Customer Tracker

I tried to design Customer Tracker to be a straight forward and easy to understand as possible. But just in case you get stuck, or are just the type that would rather read it ahead of time other then fumbling around through it, here we go...

## Preferences

The first thing you'll want to do is set up your preferences. Some preference are saved automatically, like your window size and placement, some dates, and printer settings. But there are also some you'll want to set. Below is the preferences window which can be accessed through the EDIT menu:



The screenshot shows a 'Preferences' dialog box with a title bar and five tabs: 'Contact Info', 'Import Logo', 'Email Billing', 'Miscellaneous', and 'Register'. The 'Contact Info' tab is selected and active. Below the tabs is a section titled 'Contact Information' containing several input fields:

- Company Name:** A text box containing 'Your Company Name' (highlighted in yellow).
- Address:** A text box containing '1234 Somewhere'.
- Address 2:** An empty text box.
- City:** A text box containing 'City'.
- St/Co/Reg:** A text box containing 'ST'.
- Zip:** A text box containing '12345'.
- Phone:** A text box containing '(555) 555-5555'.
- Fax:** A text box containing '(666) 666-6666'.
- Web Page:** A text box containing 'www.company.com'.
- Email:** A text box containing 'info@company.com'.

At the bottom of the dialog box are two buttons: 'Cancel' and 'Save'.

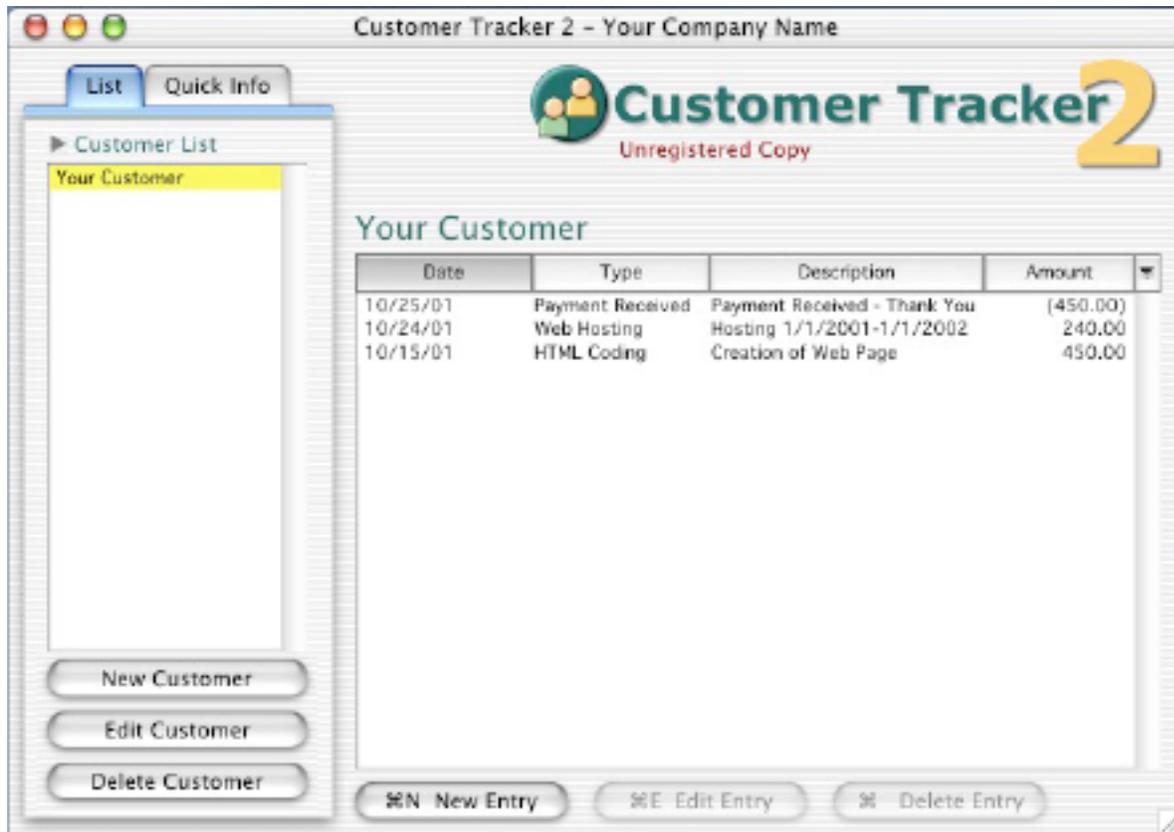
As you can see, you'll want to put your information in so it prints correctly on your documents. You can also set the late fee that is charged, a discount that can be applied, the time an item is due, your hourly rate, and a different currency sign, etc.

If you wish to have your logo print on your documents, use the preferences to import the logo. It will be imported automatically. (Recommended Size: 1 x 3 inches)

This is also where you enter your registration code you will receive when you purchase a license. After that is entered all restrictions are removed.

## The Main Screen

Now that we have our preferences set, let's move into the main screen you'll see when the program opens. Below is a sample screen shot of the main window:



Here you can scroll through customers, see their info, and what has been done for them in the past. Here's a quick overview of the options on the main screen:

- New Customer: Click this to create a new customer
- Delete Customer: Click to remove a customer forever
- Edit Customer: Double click a customer to make changes or click button
- New Entry: Click to make a new entry for the currently selected customer in the customer list
- Delete Entry: Removes the highlighted entry
- Edit Entry: Double click an entry to make changes or click button

You may also resort your entries list by any of the headings to find an item quicker. You may also reverse the sort by clicking the right "arrow" button. (Put newest entries on top instead of oldest)

There 2 tabs above your Customer List. One is the list, and the other will give you info on the selected customer. It is the same info you would see if you double clicked to edit instead,

## Making a New Customer

Here's something hopefully you'll be using often. To create a new customer and add them to your customer list, click the "New Customer" button in the main screen as was shown above. Doing so will bring up the window below.

This window has all of your basic fields, name, address, etc. Fill in all the fields you need and click "Save". This will create the new customer and allow you to begin creating entries for them.

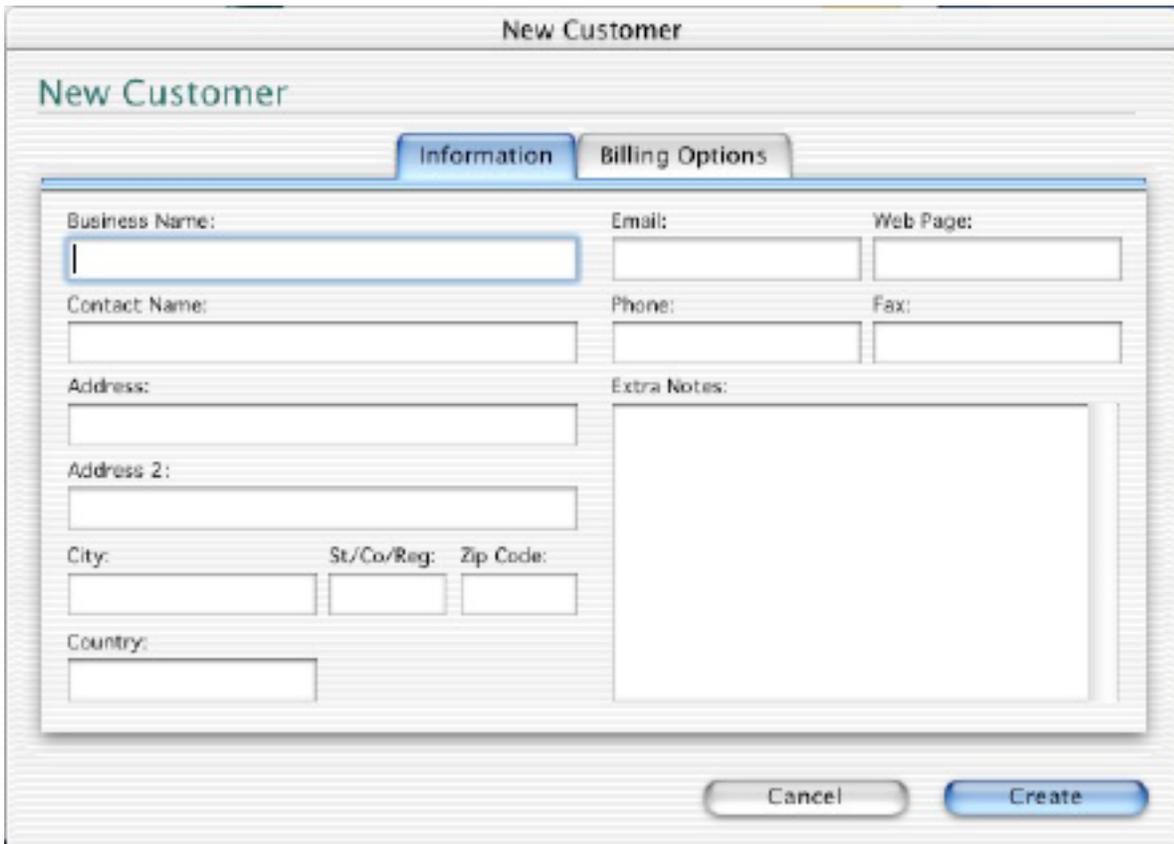
There is also a tab in this window with the 2 choices, Extra Notes, and Billing Info.

**Extra Notes:** Simply an area where you can type extra comments about this customer. Not used anywhere except for your information.

**Billing Info:** You may enter some billing info here such as their credit card number if you wish to keep it on file. You may also click Bill Customer by Paper or Email. If you choose email, when you print, an email invoice will be sent instead of a paper being printed.

And last you may give customers a discount on an individual basis as well.

See the screen shot below for a sample of how the New Customer Window looks:



The screenshot shows a window titled "New Customer" with two tabs: "Information" (selected) and "Billing Options". The "Information" tab contains the following fields:

- Business Name:
- Contact Name:
- Address:
- Address 2:
- City:  St./Co/Reg:  Zip Code:
- Country:
- Email:
- Phone:
- Web Page:
- Fax:
- Extra Notes:

At the bottom of the window are two buttons: "Cancel" and "Create".

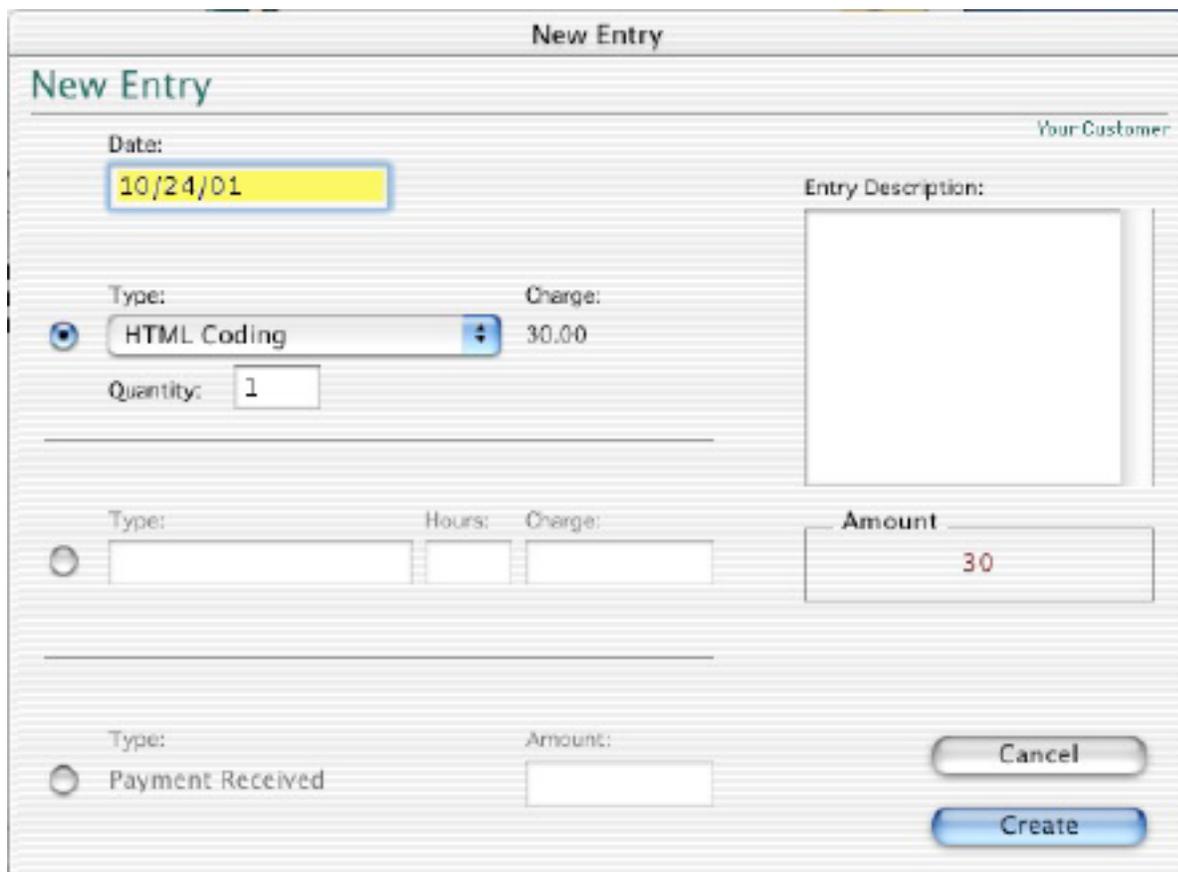
# New Entry

Since we now have customers, we'll have to enter jobs for them.

There are 3 areas in this window you will need to be familiar with.

- Common items: This is where you can quickly select a pre-entered job that you can set up under the EDIT menu, Frequent Jobs.
- Other: For those one of a kind/different jobs that you don't have a pre-entered job for.  
If you enter a hourly rate in the preferences, an area to calculate your fee will appear here as well.
- Payment Received: For entering when a customer pays you.

See Below for a screen shot of the new Entry Window:



The screenshot shows a software window titled "New Entry". The window has a header bar with the title "New Entry". Below the header, there are several sections:

- Date:** A text box containing "10/24/01".
- Your Customer:** A label on the right side of the window.
- Type:** A dropdown menu with "HTML Coding" selected.
- Charge:** A text box containing "30.00".
- Quantity:** A text box containing "1".
- Entry Description:** A large empty text area.
- Amount:** A text box containing "30".
- Type:** A radio button next to an empty text box.
- Hours:** A text box.
- Charge:** A text box.
- Type:** A radio button next to "Payment Received".
- Amount:** A text box.
- Buttons:** "Cancel" and "Create" buttons.

## Account Information

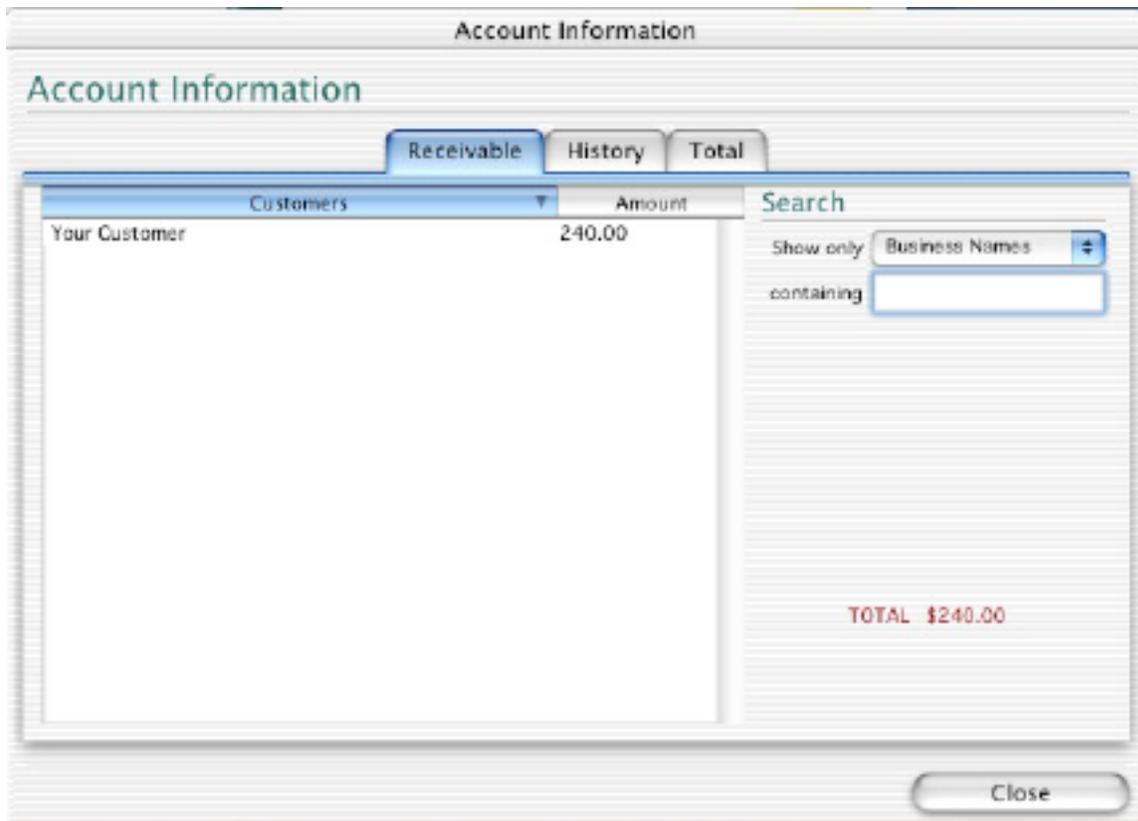
The next window you might want to get familiar with is the account information window. Here you will find three tabs to get information on all your customers and the jobs entered.

- Account Receivables: Use this to see how much each customer currently owes
- Account History: Use this to see how much you have made from each customer in the past
- Account Total: This is a combination of the above 2 choices to see how much you have made and how much you should be expecting to make together.

The three tabs should be easy enough to figure out, you can enter a date range on History and Total to narrow down the time frame if you wish.

There is also a search to narrow down to certain customers. Helpful if for example you want to see who owes you more than \$500.00, or who has a late fee over \$50, etc.

Below is an example of the Receivable Tab



The screenshot shows a software window titled "Account Information". Inside, there are three tabs: "Receivable", "History", and "Total". The "Receivable" tab is selected. Below the tabs is a table with two columns: "Customers" and "Amount". The table contains one row with the text "Your Customer" and the value "240.00". To the right of the table is a "Search" section with a dropdown menu set to "Business Names" and a text input field labeled "containing". At the bottom right of the search section, it displays "TOTAL \$240.00". A "Close" button is located at the bottom right of the window.

Customers	Amount
Your Customer	240.00

Search  
Show only: Business Names  
containing:   
TOTAL \$240.00

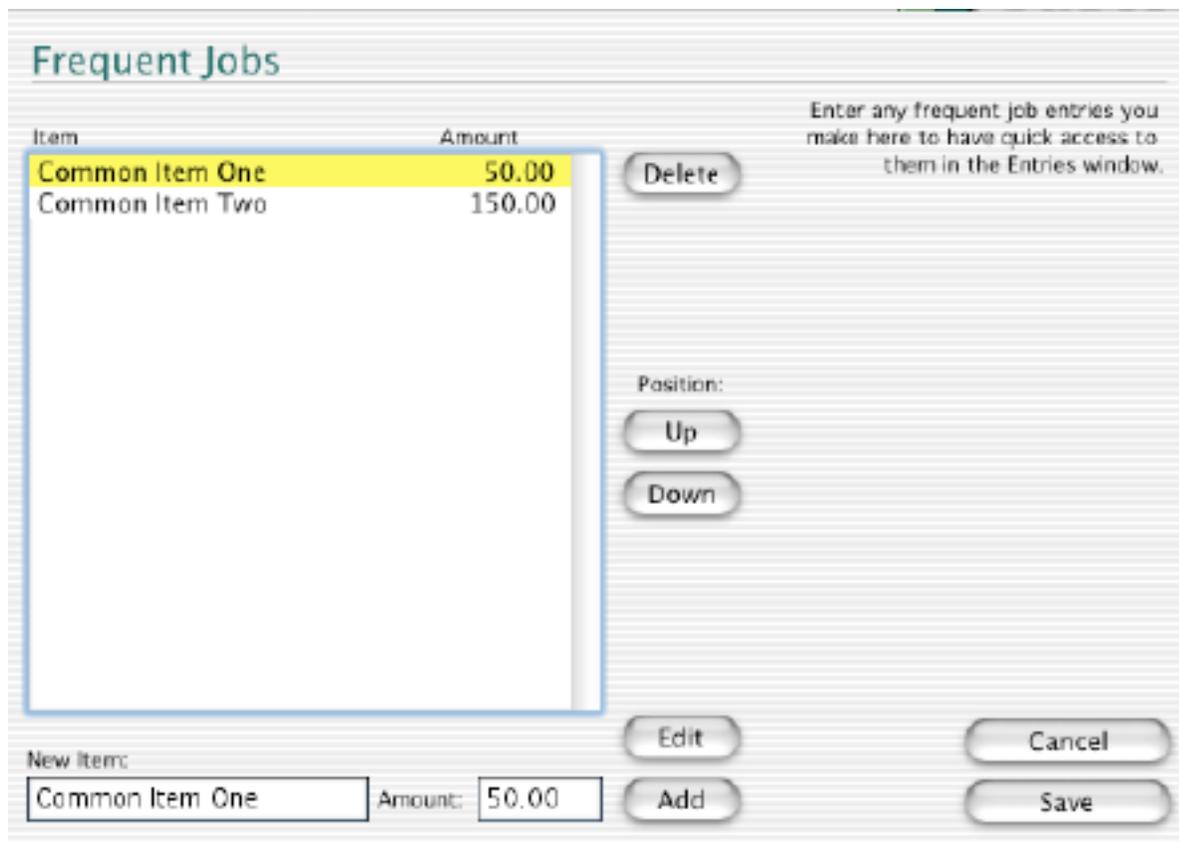
Close

## Password Protection

You may protect your files with password accounts. You may create as many accounts as you wish. As soon as one is created, a dialog will appear on launch requesting you to enter the user name and password. To remove password protection, simply delete all accounts. All accounts have equal access and may make changes to anything in the program including adding or deleting any account. **NOTE: This is meant to keep casual onlookers and unauthorized employees from making changes, it is not meant for powerful protection and could be broken by an experienced "Hacker".**

## Frequent Jobs

If you repeatedly have jobs you do for your customers at set prices (for example a web page designer's monthly update charge) you may enter them here and have quick and easy access to them in your "New Entry" and "Edit Entry" windows. You may add, edit and delete items, as well as adjust the order in which they appear in the menu using the UP and DOWN buttons. There is no limit to the number you can create.



**Frequent Jobs**

Enter any frequent job entries you make here to have quick access to them in the Entries window.

Item	Amount
Common Item One	50.00
Common Item Two	150.00

Position:

Up

Down

New Item: Common Item One Amount: 50.00

Edit Add Cancel Save

## Job Timer

There is also a job timer if you wish to track the time you work on a job, then record it as a new entry. (The transfer only shows up if you have an hourly rate in preferences setup)

You may shrink the timer by the triangle in the corner and also hide the main screen if you want it out of the way as you work.



## Printing

Next we come to the printing window. From here you can print invoices, work logs, and envelopes, estimates, labels, and reports. So here is a little bit about each one of those options and how to use them. then we'll get into the rest of the window.

- Invoices: This will print the customer information and any entries that are due. There are 3 invoice layout choices, one with a remittance slip, one with out, and a "traditional" invoice.  
Note about the Remittance slip: It is meant to be removed 3.5 inches up from the bottom. The remittance slip fits into a double window return envelope. (I use Columbian Brand No. CO165)
- Envelopes: Print No 10 Business Envelopes. Make sure you choose this in your page setup before printing. (You will have the option each time you print).
- Work Log: This prints out a list of everything ever done for a customer. Regardless of whether or not it's been paid for. It also does not print the remittance slip, and can be multiple pages. I use this for end of the year records mainly, then clear out all entries and file the print outs to free up entry space in the program. Customers may also like this sent to them occasionally.

You have 3 printing choices. Print Current Record, Print Selected, or Print all. Each is self explanatory by it's name I should think. You can also set the date printing range for the entries you wish to print. The program will automatically try and change to the correct date range each time you print according to your Preferred Days Due.

Choose whether you want to print the logo on your documents, or if you want to print the text version of your info. You may not print both, but you can print neither if you wish to print on a letterhead instead. (You can set the top margin for your letterhead)

You can also choose the font and size that the invoice will be printed in.

And last you can set the margins (maybe for your letterhead), or set it to the top margin of your printer if you have no letterhead or are printing a logo or the text version of you information.

On the next page you will find a screen shot of the print window.

## Printing Options

**Print Current Customer**  
 Currently Selected: Your Customer

**Print All Customers**  
 Only prints invoices that need printing

**Print Selected Customers**  
 (Command-Click to select multiple Customers)  
 Your Customer

**Date Printing Range**  
 1/1/01 to 10/24/01 Today

**Printing Font:** Geneva Size: 9

Top Margin: 0.5 Inches  
 Side Margin: 0.25 Inches

Print logo on documents

**Invoices** | Work Logs | Estimates | Envelopes | Labels | Reports

**Invoice Design 1**  
 Invoice with bottom remittance slip

**Invoice Design 2**  
 Invoice with no remittance slip

**Invoice Design 3**  
 "Traditional" service invoice

Print business info  
 Calculate Previous Balance  
 Print Message on Invoice

Put your custom invoice message here!

Preview Close Print

## Importing and Exporting

You may import your old information and entries from a previous version of Customer Tracker (version 1.x only, upgrading from a 2.x to a higher 2.x version will be done automatically)

You may also export your information into a text file to be opened by another program, or as another backup method. (Even though there is a backup built in, and you really can't import it again either) You can export either just your Customer Database, or both Customers and Entries together.

## Multiple Businesses

Customer Tracker can also support multiple businesses if you run more than one. A separate license and code is required for each business.

The selection menu will appear if more than one business exists, and to create another one go under file to "Multiple Businesses"

### Multiple Businesses

**Current Accounts:**  
 Test Company  
 Your Company Name

**Account Logo**  
 [Empty Logo Field]  
 Remove Add

Duplicate Delete New Cancel Switch