Getting Started with Optrax

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CHAPTER 1

Welcome to Optrax

Optrax is a diary and scheduling system. You can see the daily Activities for a group of Employees (a View) on a single Diary Screen.

An Activity is any event or occurrence that you can record in Optrax. Typical Activities that appear on the Diary Screen might be an appointment, a meeting, a quote or other item of work that you want to record. Exactly what you record depends upon the nature of your business. For example, a building company might have activities such as: lay foundation, plastering, electrical works and so on.

An Activity for an Employee can be linked to a Project which has a related Site and Customer.

Optrax uses a postcode database from Royal Mail to extract address information. When you need to add an address, you can simply type the postcode, and the address (apart from the street number) is automatically displayed.

There is a powerful Search routine that allows you to find answers to questions such as, “Which travelling sales representative is closest to customer Smith next Friday?”. Postcode data is utilised for this search. Therefore, ensure that as far as possible, for **all** addresses that you record, the postcode is used.

Extensive reporting facilities enable you to extract valuable information from the data that has been entered.

The next sections describe the Optrax system in a little more depth. The online help contains additional information about the tasks that you can perform.

Users

There are two types of user in the Optrax system:

- Optrax Users. Anyone who is permitted to use Optrax for routine work (not all functions are available).
- Optrax Administrators. Any Optrax User who has full access to the system and who additionally can add or remove other Optrax Users.

Where the difference is not important, we use the term “User”.

If you are an Optrax User, you will be given your user name and password before you use Optrax for the first time.

The Optrax Administrator who has overall responsibility should install the software and then perform the Administration Set-up Tasks.

Customers, Sites and Projects

A Customer can be an individual (Domestic Customer) or an organisation (Business Customer). Each customer must have at least one associated Site and one Project.

Projects are the key to updating Customer and Site records. Projects are like a folder of information that record all Activities that you assign to them. When you select a Project, Optrax automatically knows the associated Site and Customer.

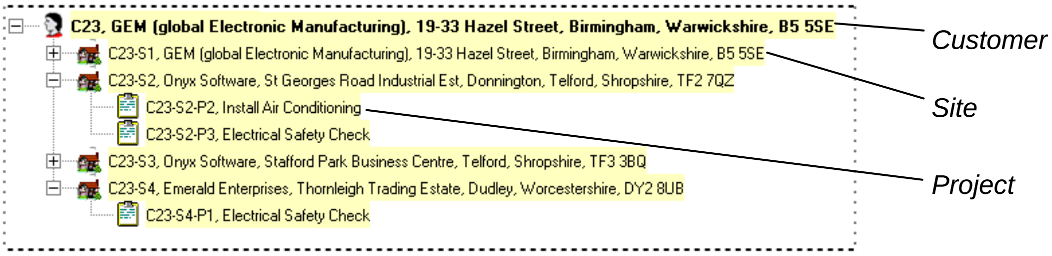
A Site is a location where work is taking place. A Site is normally owned or managed by the Customer. Often for domestic work the Customer and Site Details are exactly the same, but businesses may have a head office and many different Sites.

Optrax allows you to create multiple Sites for a Customer and also to have different Projects occurring at each Site. This provides a powerful way to control the workload and to ensure that the correct work is carried out for a particular quote or contract.

You cannot create a new Customer without also creating at least one Site and one Project. If you already have Customer data that you want to add to Optrax, and if there are no existing projects or if you do not want to add any historical project data, then you should create a Project with a Type called Unspecified. You can then modify this later to make it more specific.

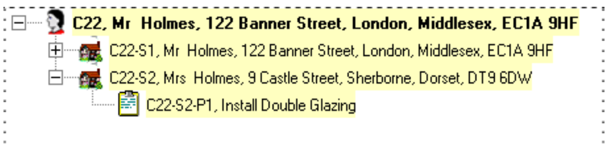
Commercial Customer with Multiple Sites

In this example, there are many subsidiaries for the Customer, and one of the Sites has got more than one Project.



Domestic Customer with Multiple Sites

In this example, Mr Holmes has got a main residence and a holiday home.



Types

Types are user-defined fields that describe the structure of your company.

Types are important as they add definition for the reports that you generate. The more Types there are, the finer the level of detail that can be usefully extracted from a report.

Typically, the Optrax Administrator would create several basic Types and Optrax Users would add to them and refine them later as required.

If a Type is edited, then in addition to affecting any future use of the Type, all previous instances of it are also changed. This is very useful if you need to rename an item.

Activity Types

These are used to name all the Activities that will be recorded. Typically, you would want to keep records of both on-site or customer-facing work, and internal administration.

For example, a building company might have Activity Types like these:
Install Kitchen, Lay Foundation, Plastering, Electrical, Meeting, Sick Leave, Incoming Phone, Sales Estimate, Sales Meeting, and so on.

Non-Diary Activities are Activities that appear in the Project History screen only and not on the Diary Screen. Typical Non-Diary Activity Types might be:
Project Note, Quotation Sent, Complaint Received, Phone Call and so on.

Each Activity Type has a default duration. Optrax Users can over-ride this if appropriate when they book Activities.

Job Titles

These are the Job Titles or roles for Employees. For example, there might be:
Salesman, Administrator, Technician, Director, Plumber (with qualification level), and so on.

Project Types

These are the types of project that you do for your customers. For example, a building company might have Project Types like these: Build House, Design House, etc.

After the Project is created, various activities are added over time. For example, with the “Design House for Mr Smith” project, there would be Activities to record meetings, discussions, phone calls and so on.

Supplier Types

Suppliers can be grouped according to Supplier Types. In addition to tangible supplies, there can be Types for services such as maintenance contracts and vehicle repair.

For example, a building company might have Supplier Types like these:
Ceramic Tiles, Concrete Products, Electrical Supplies, Fireplaces, Office Cleaning, etc.

Source of Enquiry Types

One option that is available when a Project is created (or modified) is to specify the source of the enquiry. Using this allows you to determine the effectiveness of various forms of advertising.

Some typical examples are: Trade Magazine Advertising, Van Advertising, Word of Mouth, Yellow Pages.

There are two Types which are automatically available. You do not need to define these: Unspecified and Repeat Business. Additionally there is Type called Now Inactive which is a failsafe for deleted Types.

CHAPTER 2

Tips to Maximise your Efficiency

This chapter shows you some useful techniques that apply to Optrax as well as most other Windows-based programs.

Please note that this is not a tutorial on how to use Windows. If you do not know the basics, please obtain training.

Moving between Fields using the Tab key

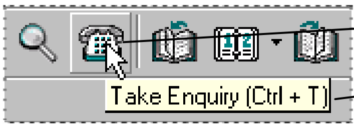
One way to move the pointer (cursor) from one field to another is to move the pointer to the new field and click the mouse button.

A much faster method is to use the TAB key on the keyboard. This key is usually located just to the left of the Q key.

Using Shortcut Keys

Rather than clicking menu items or icons, use keyboard shortcut keys. To use these efficiently, you must remember them!

To find a keyboard shortcut from an icon



1 Place the pointer over an icon

2 A small popup appears. It shows the shortcut (CTRL + T in this example).

To use a keyboard shortcut

1 Press the first key (CTRL in the example above) and hold it down.

2 Press the second key (T in the example above).

3 Release both keys. The appropriate screen opens.

Opening and Closing a Tree View

A tree view is a type of list which can be expanded. This example shows a partially opened tree view from the Customer Screen.

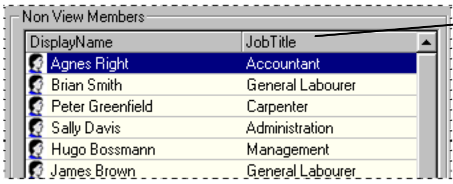
To see more

Click on ⊞.

To hide the sub-entry

Click on ⊟.

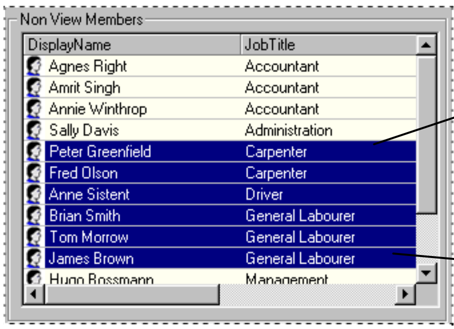
Sorting a List



1 Click on the grey area at the top of a column. The items will be sorted in ascending order (as shown in the picture below).

2 Click again to sort in descending order.

Selecting more than One Item in a List



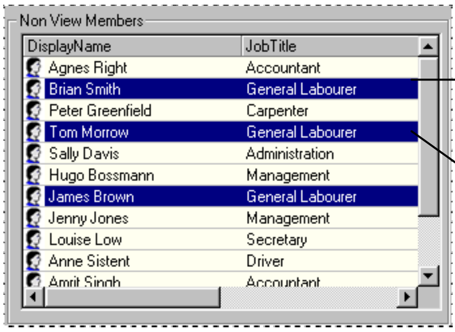
To make a continuous selection

1 Move the pointer over the first item and click the mouse key to select the item.

2 Press the SHIFT key on the keyboard and keep it pressed.

3 Select the last item. All items in the range will be selected.

4 Release the SHIFT key.



To make a non-continuous selection

1. Click an item using the mouse.
2. Press the Ctrl key on the keyboard and keep it pressed.
3. Click the next item, and repeat till done.
4. Release the CTRL key.

These two methods can be combined.

To de-select an item that is currently selected

1. Press the Ctrl key on the keyboard and keep it pressed.
2. Move the pointer over the item to de-select.
3. Click the mouse.

Using a Wheeled Mouse

If you use a wheeled mouse, then you can use it to scroll up and down lists and to select an item from a dropdown. This works on the Diary Screen and all other screens where a scroll bar is available.

Selecting an Item Quickly using Auto Complete

Rather than selecting an item from a dropdown list, you can use auto complete. This is a much faster method, but to use it, you must know the item that you want to enter.

1. Start to type the word here.
2. Once Optrax identifies the item, the entire name is automatically completed.

CHAPTER 3

Installation and Backup

These requirements apply to all machines on which Optrax is installed.

Operating system:	Windows 95/98/2000 or NT
Monitor:	SVGA 800 × 600 display
Processor:	Pentium P100 or above (P300) recommended
RAM:	32 MB (64 MB recommended)
Free hard disc space:	20 MB for Optrax program
Free hard disc space:	250 MB for postcode data

The multi-user version works on most PC networks including NT and Novell.

Optrax is supplied with a limited licence for evaluation purposes. To purchase a full licence, phone New Vision Software on 01604 644944.

To install or upgrade the software

Note Please be patient, some operations can take many minutes, and no apparent activity will take place.

1 Close all programs, then insert the Optrax CD. The installation program should automatically start.

2 Follow the on-screen instructions.

3 After the computer has shut down and re-started, you can use Optrax. If this is a new installation, the Optrax Administrator should set up the system (see next chapter).

To un-install Optrax

1 Open the Windows Control Panel. Select **Add/Remove Programs**.

2 Highlight the entry for Optrax. Click **Add/Remove**. Follow the on-screen instructions.

3 You may have to wait a few minutes after you choose the **Finish** button.

Backing up Optrax Data

The file Optrax.mdb contains all the Optrax data. This should be backed up every day. Optrax must not be running on any machine during the backup. The location of the files depends upon the folder that you specified when the software was installed.

Other files can be restored from the installation CD.

Postcode and related address information is contained in a third-party file (PAF.mdb) from Royal Mail. You cannot modify this information in any way. If you have a current maintenance agreement with New Vision Software we will automatically provide updates when they become available.

CHAPTER 4

Administration Set-up Tasks

The overall process for setting up Optrax is explained in this chapter. Optrax must be set up by an Administrator before it can be used for routine tasks. The first person who logs in to Optrax after it has been installed has administrator access to the entire system.

You can update the information at any time. Optrax users have access to most of the functions (depending upon their user level), so they too can make changes. However, you should implement a business strategy to prevent uncontrolled changes to the system.

Step 1. Design the System

You can add Types, Suppliers, Employees and other records to Optrax whenever they are needed. However, to avoid unnecessary changes, you should plan your system in advance (possibly together with other members of your organisation) and add the records before Optrax is used for daily work.

1. Define the Types that will be available.
2. Define the level of control that Optrax will have. For example, when creating an appointment, it could have a default duration or it could be initially undefined (that is, it could have a time of 00:00).
3. Decide which Employees will be Optrax Users and what user level will be assigned to them.
4. Optionally, if there is significant customer information to move from your existing system, contact New Vision Software to find out about our data migration service.
5. Obtain all the relevant information about your Own Company, Employees, Suppliers, Customers and their Sites.

Step 2. Start Optrax for the First Time

1. From the **Start** menu choose **Programs**, **New Vision Software**, **Optrax**. The Log On screen appears.
2. Select the User name: **`Supervisor`**
3. Type the password: **`Optrax`**
4. Choose **OK**.
5. Four columns appear on the screen, labelled Supervisor, Employee One, Employee Two and Employee Three. At the very top of the screen the user is shown as Supervisor and the View is New Install.

Step 3. Set Yourself up as the First Administrator

1. Choose **Records**, **Employees** from the Diary Screen. The Employee screen appears. The four pre-defined records are visible.

   Note 1. The Employee screen is described later. For now, just perform the following operation.

   Note 2. At some stage, you should edit the existing Employee records to correspond to people in your organisation. For now, this is not necessary.

2. Highlight the record for the Supervisor and choose **Edit**.

3. Enter your name in the fields.

4. Click the Optrax User tab.

5. Choose **Change Password** and confirm when asked.

6. Type your new password. Choose **Save**.

7. Retype your password in the dialogue box that appears. Choose **OK**.

8. Choose **Close** to exit the Employee screen.

Step 4. Log Off and Log On

1. Log off (**File**, **Log off**). The Log on screen appears.

2. Select your User name and type your password (you modified these in the previous step). Choose **OK**.

Step 5. Modify Own Company Information

This step is optional. You can do it later if you are in a hurry to get started.

1. Choose **Tools**, **Own Company**. The Own Company Maintenance screen appears.

2. The first line should be highlighted automatically.

3. Choose **Edit Company**. The Edit Company screen appears.

4. Enter your company details. **Tip**: use the TAB key to move between fields.

5. Enter the contact information.

6 Choose **Save**, then choose **Close**. The Own Company Maintenance screen re-appears.

7 Highlight the second line (Your Site) and choose **Edit Company Site**. The Edit Own Company Site screen appears. Enter the site and contact details.

8 Choose **Save**, then choose **Close**. The Own Company Maintenance screen re-appears. The company and site lines now show information for your own company.

9 Choose **Close**.

Step 6. Add Types

Add the most common Types you will require. As a minimum, add Activity Types and Job Titles.

If a Type is edited in the future, the changes will apply not only when the Type is used in the future, but also to existing instances. This means that you can easily rename the Type or correct any errors that are made.

Activity Types have more options that any of the other Types, so we show you how to add one of these. Use a similar process to add other Types, but remember that not all the Activity Type options will be available.

To add an Activity Type

1 Choose **Types**, **Activity Types** from the Diary Screen. The Activity Types Maintenance screen appears (see below).

2 Choose **Add**. Enter the details for the Activity Type.

Note For full details of each field, see the online help (press F1 key).

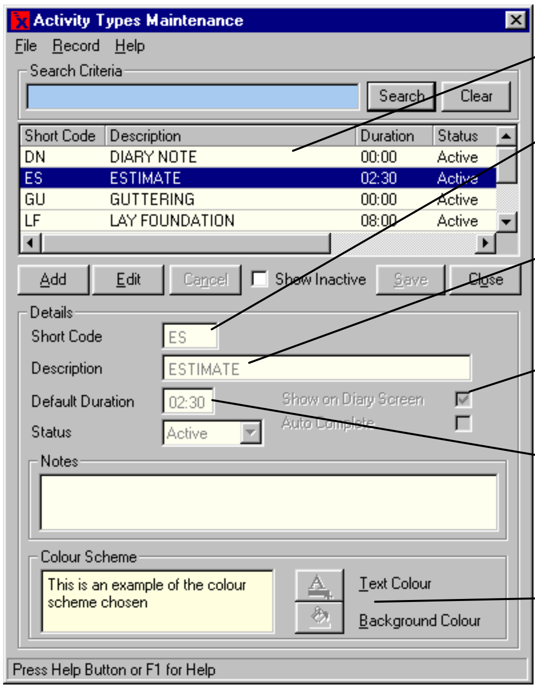
3 You can specify the text and background colours. Colours help you to identify easily Activity Types on the Diary Screen. Keep similar Activity Types similar colours.

Dark colours with white text work best on the Diary. Choose **Text Colour** or **Background Colour** to change those colours.

4 Choose **Save**.

5 Repeat the process until all the Activity Types have been added. Then choose **Close**.

Activity Types Maintenance screen



Any existing Activity Types appear here.

Short Code is a quick way to select Activity Types from the Activity Booking screen.

The Activity Type itself. This is what Optrax Users see in the dropdowns when they select an Activity Type.

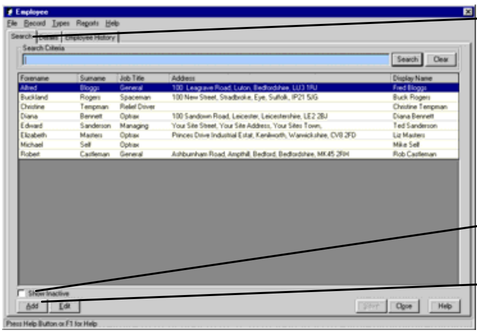
If Show on Diary Screen is not selected, Activities will be available only from the Project History screen (page 31).

Default length of time for the Activity. Optrax Users can change the value when they create the Activity.

Use the Colour Scheme to change the colour of Activities that will be created on the Diary Screen.

Step 7. Add Employees

1 Choose **Records**, **Employees** from the Diary Screen. The Employee screen appears (shown here with some data).

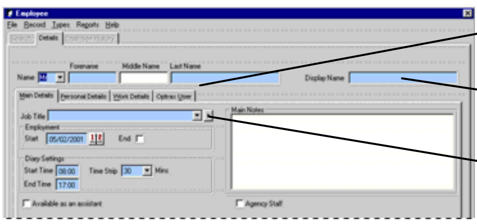


Details tab. Shows details for the highlighted Employee or the Employee who is being added.

Show Inactive. See end of this section.

***Add** button.*

2 Choose **Add**. The Details tab appears, and the Main Details sub-tab is automatically selected.



There are four tabs here. For full details of the fields, see the online help.

Display Name.

Click to create a new Job Title.

3 As a minimum, enter these details in the Main Details tab.

a Employee's Name information. The Display Name is the name that will appear on the screens. It is automatically entered when you type the Employee's Forename and Last Name, but you can overwrite this so that, for example, Robert Smith has a Display Name of Bob Smith.

b Job Title. Either:

- Select one of the Job Titles you defined in step 6.
- Create a new Job Title by clicking on the arrow.

c Start date is automatically set to the current date. Optionally, change it by either typing a new value or clicking the Calendar button.

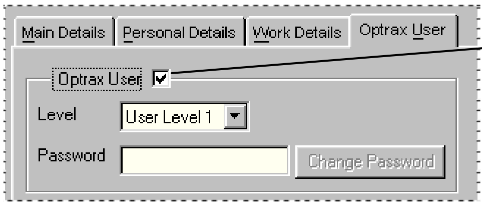
d Optionally, change the Diary Settings. Start Time is the Employee's normal starting time on the Diary Screen. End Time does not affect the Diary Screen, but it does appear in reports. Time Strip specifies the default duration of each Time Strip (the yellow area where an Activity is entered).

4 Choose the Personal Details tab and complete the fields (if the details are available).

Note In the Home Address section, type the postcode first, then press the TAB key. The address, apart from the street number, will be automatically entered.

5 Choose the Work Details tab and complete the fields (if the details are available).

6 If the Employee will be an Optrax User, then choose the Optrax User tab.



Initially, Optrax User is not selected, and Level and Password are not shown on the screen.

a Select Optrax User. The Level and Password fields appear.

b Select the Level (Level 1 = Optrax Administrator, all others = Optrax User). To see the privileges for a level, select that level. The restrictions and suitability are shown on the right of the screen.

c Type a password (you will be asked for confirmation later).

7 Choose **Save**. If you performed the previous step, then you will be asked to confirm the password.

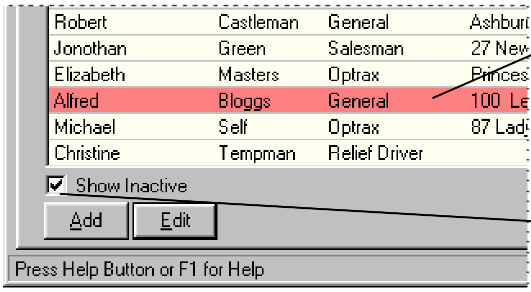
8 To add another Employee, choose **Add**, and repeat the process.

9 When all Employees have been added, choose **Close**.

Active and Inactive Employee Records

Employee records are available for use (Active) in the Diary Screen only after the Employee's start date and before the end date, if there is one. Outside these dates, the record is Inactive. This means that if you set the start date to be one month in the future, although the Employee might appear in a View, User's will not be able to assign Activities until that date.

By default, Inactive records are not shown in the Employee list. To see inactive records, select the Show Inactive option. The record appears with a pink background. You can edit it, if required.



This record is Inactive and cannot be selected for use in the Diary Screen. However, it can be edited from the Employee screen.

To see the Inactive record in the list, Show Inactive must be selected.

Step 8. Add Suppliers

This step is optional. You can do it later if you are in a hurry to get started. Ideally, before adding Suppliers, ensure that all the Supplier Types have been defined (**Types**, **Supplier Types**).

1 Choose **Records**, **Suppliers** from the Diary Screen. The Suppliers screen appears.

2 Choose **Add**. The Details tab appears.

3 Enter the supplier details. Remember to use the TAB key to move between fields.

Note For the Supplier Type field, if a suitable Supplier Type does not exist, create a new one by clicking on the arrow.

4 Choose **Save**.

5 Add another Supplier. When all the Suppliers have been added, chose **Close**.

Step 9. Create Views

A View is a way of grouping Employees so that they can all appear on the Diary Screen at the same time. You can put an Employee into more than one View. Some Views you could create are: Optrax Administrators, Sales Team, Trainees, General Labourers.

1 Choose **Views**, **View Manager** from the Diary Screen. The View Manager screen appears (see picture below).

2 Choose **Add New View**. Enter the following information in these fields:

a Name. This is the name that Optrax Users see when they select a View.

b Description. Optional additional description.

3 Add Employees to the View.

Note The more employees in a View the slower the display and search routines may operate. This will be totally dependant on the performance of your computer system.

a Highlight one or more Employees from the Non View Members list. **Tip**: see “Selecting more than One Item in a List” on page 5.

b Choose **<<Add** to copy the names to the View Members list.

c Optionally, change the order that Employees will appear on the Diary Screen. To do this, highlight one or more Employees in the View Members list and use the **Up** and **Down** buttons to move the Employee to the required position.

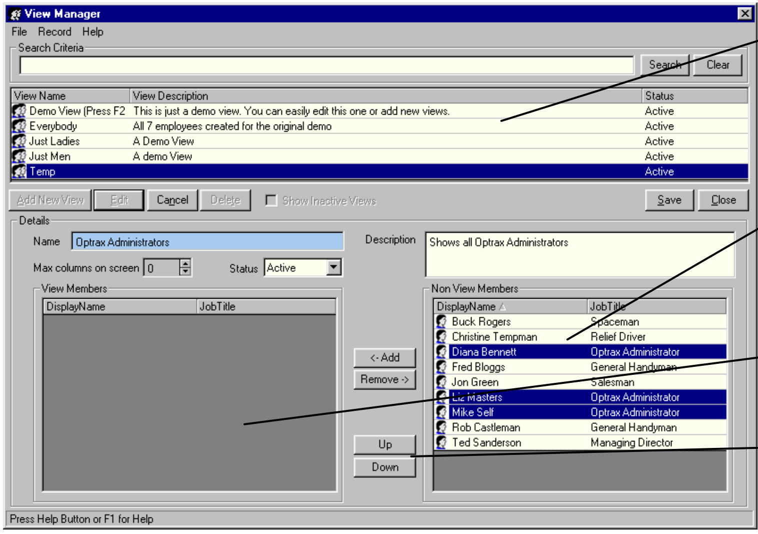
4 Choose **Save**.

5 To add another View, choose **Add New View**, and repeat the process.

6 When all Views have been added, choose **Close**.

View Manager screen

This shows the screen part way through adding a View.



Existing Views appear here.

Highlight Employees in the Non View Members list and ...

*use **<<Add** to copy them to the View Members list.*

Use to change the order of Employees in the View Members list.

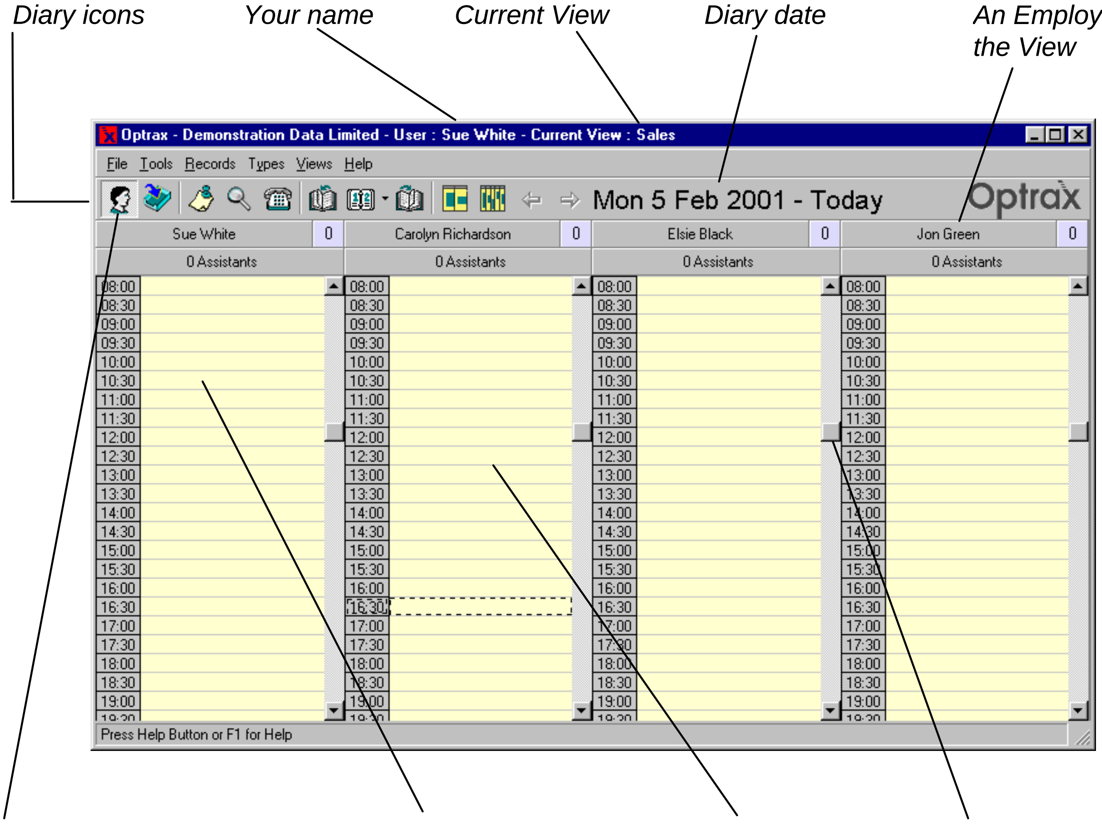
CHAPTER 5

Diary Screen Overview

To start Optrax and log on

1. From the **Start** menu choose **Programs**, **New Vision Software**, **Optrax**. The Log On screen appears.
2. Select your User name and type your password. Choose **OK**.
3. The very first time that you log on, the Diary Screen will be blank until you select a View. (Choose **Views**, **Other Views**, then select a View.)
4. You will then see a screen similar to the one below.

Diary icons *Your name* *Current View* *Diary date* *An Employee in the View*



If you are not in the View, click here to see your User Column.

User Column and Unallocated Column appear here if activated.

Right-click to obtain a menu.

Use the scroll bar to move up and down.

Note
If the User Column icon is red, this means that the column is not currently displayed and that there is at least one Activity for you. Click the icon to display the column and view your Activities. Similarly, if the Unallocated Column icon is red, there are unallocated Activities. Click the icon to view the column.

To log off and close Optrax

1. To close Optrax entirely, choose **File**, **Exit**.
2. To log off only and to leave Optrax available for another user to log on, choose **File**, **Log off**.

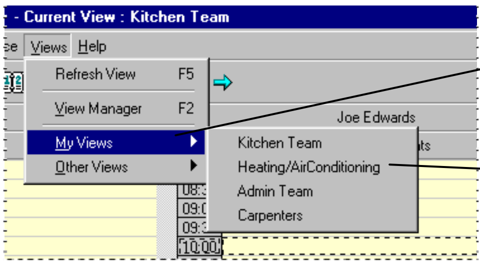
Selecting Views

A View is a way of grouping Employees so that they are all available on the Diary Screen at the same time.

To select a View

Choose **Views**, **Other Views** from the Diary Screen. Then select the View.

Note



*Optrax moves a View from **Other Views** to **My Views** after the first time that you select it.*

A sub-menu shows the Views.

Diary Controls

Most of the controls for the Diary are accessed using the icons, which are shown below. When an icon is grey, you cannot use it.

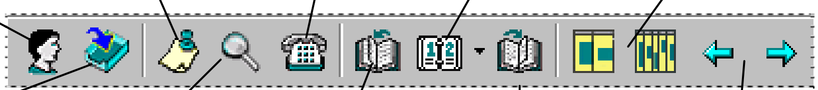
Click to show or hide your own User Column.

Book an Activity.

Take an enquiry.

Show the Calendar.

Increase and decrease the width of the columns.



Click to show or hide the Unallocated Column. Shows unallocated Activities.

Open the Search screen.

Move one day backward (forward) in the Diary Screen.

Scroll to see Users on the left or the right. If not available, there is nothing to see.

Tip: From the Diary Screen, to see what an icon does, place the mouse over it (see "Using Shortcut Keys" on page 4).

The Diary is automatically set to refresh every 60 seconds. This allows you to see updates on a network. Optionally, change the frequency with which the Diary is refreshed.

To set the Diary refresh rate

1 Choose **Tools**, **Preferences**. The Preferences screen appears.

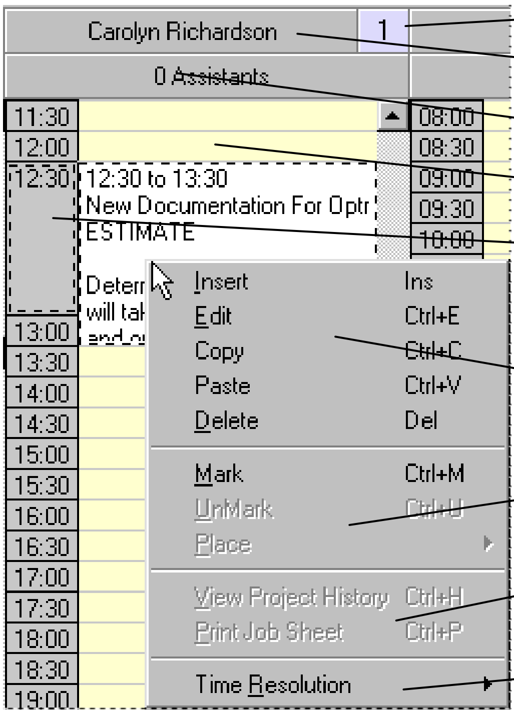
2 In the Display Refresh field select or type a new value. Choose **OK**.

CHAPTER 6

Activities in the Diary Screen

To activate most of the Diary Screen functions you need to right-click your mouse button to obtain a menu. The options available depend upon where on the Diary Screen you clicked.

Typical options available after you have created an Activity



Number of Activities for Employee.

Employee name.

Number of Assistants.

A Time Strip.

Status of the Activity is shown here (except if “Incomplete”).

Right-click menu showing basic editing options.

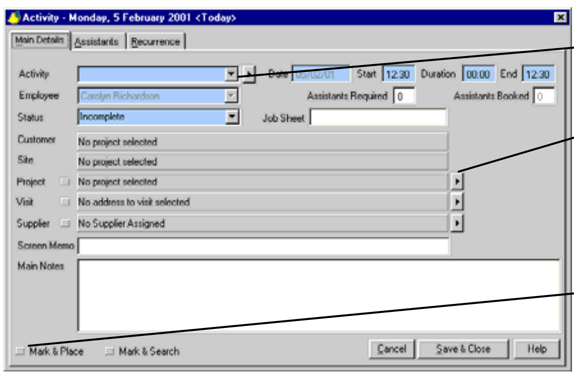
Mark, Unmark and Place are enhanced options for moving Activities.

If an Activity is assigned to a Project, then Project History and Job Sheets are available.

Temporarily change the length of time for Time Cells.

To book an Activity (simple example)

1 Right-click on a Time Strip for the Employee and choose Insert. The Activity Booking screen appears. **Tip**: remember to use the TAB key to move between fields.



Select an Activity Type.

Customer and Site are entered automatically if a Project is selected.

Optionally, click here to Mark the Activity so it can be Placed later (see next section).

2 Select the Activity Type.

Note If a suitable Activity Type is not available, click the ▸ arrow to obtain the Activity Types Maintenance screen (see “Step 6. Add Types” on page 10).

3 Optionally, modify the start time and ensure that the duration is not zero. The end time will be automatically adjusted.

4 Often, you would link the Activity to a Project. To do this, click the ▸ arrow on the right of the Project field. The Select Project screen appears. Search for the Customer and then select the Project. (The search and selection steps are similar to those of taking an enquiry. See “Step 1. Take Enquiry Screen” on page 22.)

5 Sometimes the person who will carry out the Activity may be required to go to an address that is different from the Site address. To add an alternative address to visit, click the ▸ arrow on the right of the Visit Address field. Choose **Add Visit Address**, and then select one of the sub-menus. A screen will appear from which you can select an address.

6 Type information about the Activity into the Main Notes field. This information will be displayed on Job sheets, in the Project History and on the Diary Screen.

7 Optionally, type any supplementary information about the Activity in the Screen Memo field. For example, “Don’t move this Activity”. The information will be displayed only on the Diary Screen.

8 Choose **Save & Close**.

Updating the Status of an Activity

By default, when you book an Activity, the Status field is set to “Incomplete”. You can change this to reflect the current status of a job. Some examples are given here:

- When an Employee calls you to confirm arrival at a Site, change the Status to “Arrival Time Confirmed”. Also, at this stage, you might enter a value in the Job Sheet field. This is for recording paperwork numbers such as Job Sheets that have been pre-printed.
- When the job is complete, change the Status to “Complete”.

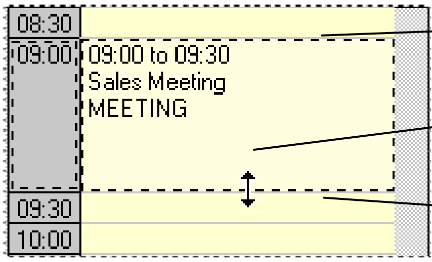
Always keep an accurate record of the status of jobs, to ensure that any reports that are generated are also accurate.

Moving and Deleting Activities

You can move or delete an Activity only if it has a status of Incomplete. There are three ways of doing this:

- Use standard editing options to copy, paste or delete the Activity. These are accessible from the right-click menu on the Diary.
- Left click on an Activity and hold the mouse button down. The pointer changes to a hand. Drag the Activity to a new location. You will be asked for confirmation.
- Mark and Place the Activity (see next section).

Additionally, you can move the start time and the end time of a meeting by dragging, as shown below:



Click the Activity so that it has a border.

Move the pointer over the start time or the end time. It changes to a double arrow.

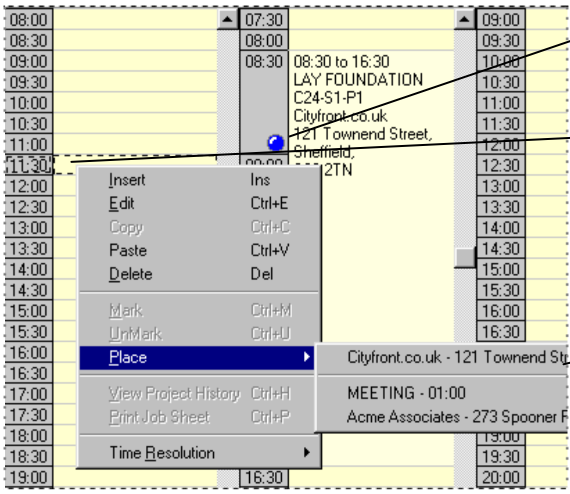
Drag the line to a new time.

Marking and Placing Activities

The **Mark** and **Place** sub-menu items represent a very powerful tool within Optrax. Marking an Activity will allow it to be moved between Employees, Views and Dates.

When you Mark an Activity, it becomes available on the **Place** menu. You can Mark multiple Activities. You can also Place Activities that have been Marked by other Users. A listing of the Marked Activities can be viewed (and Placed) from the **Place** menu.

Example of Marking and Placing



The blue dot indicates that this Activity has been Marked.

When you Place the Activity, it will be moved here (the Time Strip from which you obtained the right-click menu).

All Marked Activities are on this menu. The Activities you Marked are above the line, and those Marked by other Users are below the line.

To Mark an Activity

1 Right-click on the Activity.

2 A menu appears. Select the **Mark** option.

Note Until you Place the Activity, it will not move, but it will have a blue dot in the master time cell to indicate that it is available for Placing.

To Place an Activity

1 Select the View and the date you require.

2 Click on the start time of the Employee column on which you want to Place the Activity (you can Place the Activity with any Employee).

3 Right-click and choose the **Place** menu, then choose one of the Activities.

To Unmark Activities

Note Unmarking an Activity removes it from the **Place** menu and removes the blue dot from the Activity on the Diary Screen. The Activity itself remains in its original position on the Diary Screen.

There are four ways of Unmarking Activities:

- Right-click on an Activity and select the **UnMark** option.
- Choose **Tools**, **Clear My Marked Activities** to Unmark all your Activities.
- If you are an Optrax Administrator, choose **Tools**, **Clear All Marked Activities** to Unmark all Activities for all Employees in all Views.
- If any of your Marked Activities remain when you log off, you are asked whether or not you want to remove them.

CHAPTER 7

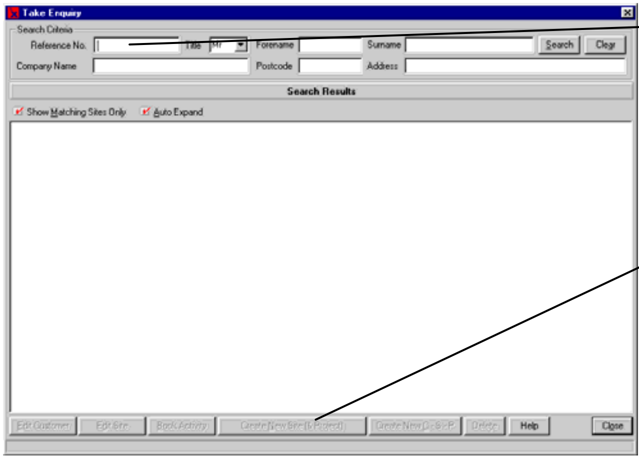
Taking Enquiries

This chapter explains how to take an enquiry from a (potential) Customer. An enquiry can be in many forms: a phone call, a fax, an email or even a letter.

When you take an enquiry, you enter information about a Customer, a Site and a Project. At the end of this process you would then usually go directly to the Activity Booking screen (see page 18) to book an Activity to the diary. A record of this information will then be stored in the Customer's Project History screen.

Step 1. Take Enquiry Screen

1 Choose the Take Enquiry icon. The Take Enquiry screen appears.



Reminder: use the TAB key to move between fields.

Initially, the screen is empty and the main buttons at the bottom of screen are not available.

2 Check to see if the Customer already exists. To do this type any of the following information into the appropriate field: Surname, Company Name or Postcode.

Note 1. The Reference No. field is for Customers that already exist. The Address field is for finding Customers using part of their address.

Note 2. For a simple search, any one of the fields is sufficient. However, you can enter all the information for a new Customer. The advantage of doing this is that if you then create a new Customer, Optrax will base the new record on the information that you entered.

Note 3. If a Company Name is entered, and if a new Customer is created later using this, the Customer will automatically become a Business Customer.

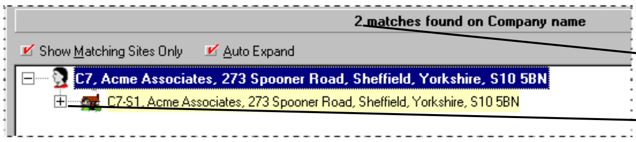
3 Choose **Search**.

4 What happens next depends upon whether or not the Customer record exists in Optrax.

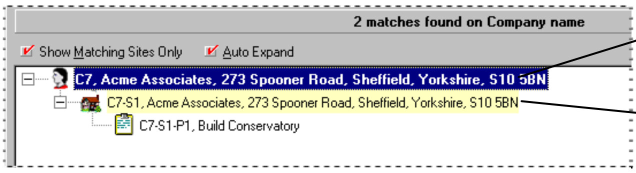
- If the Customer does not exist in Optrax, the screen remains empty. Choose **Create New C-S-P** (C-S-P is short for Customer-Supplier-Project). The Customer screen appears (see step 2).
- If the Customer already exists in Optrax, the record appears. See "Dealing with an Existing Customer".

Dealing with an Existing Customer

1 When you search for a Customer, if that Customer exists, the screen will look similar to this:



2 Click ⊞ on a Site to see the Projects for the Customer.

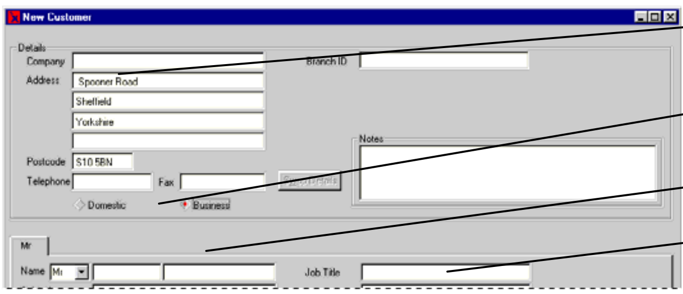


Note If no Sites are visible, then either click ⊞ on a Customer, or select the **Auto Expand** option.

3 Do one of these:

- Create a new Site and Project for the Customer by highlighting the Customer and then choosing **Create New Site (& Project)**. The Site screen appears (see Step 3).
- Create a new Project for the Customer by highlighting a Site and then choosing **Create New Project**. The Project screen appears (see Step 4).

Step 2. Take Enquiry – Customer Screen



1 If the address is not already entered, type the postcode. When you press the TAB key the postcode will automatically complete the main address details. You will then have to add in the house name or number.

Note If the postcode is not recognised, a warning message will appear. If Optrax prevents you from using a postcode, you must leave the postcode field empty and complete the address manually. The search facilities in the Diary will not operate with this address.

2 Select whether the Customer is Domestic or Business. This provides the correct fields, as there are differences between domestic and business records.

3 Enter the contact information.

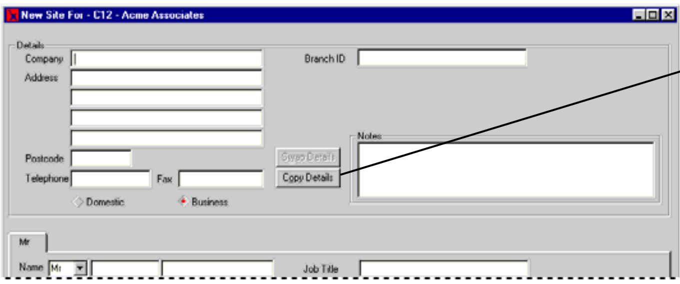
4 Optionally, add more contacts.

a Choose **Add Contact**. A new tab appears.

b Enter the contact information.

5 Choose **Next**. The Site screen appears (see next step).

Step 3. Take Enquiry – Site Screen



*Use the **Copy Details** button to copy the Customer address and Contact details to the Site address and Contacts.*

1 Enter the Site details.

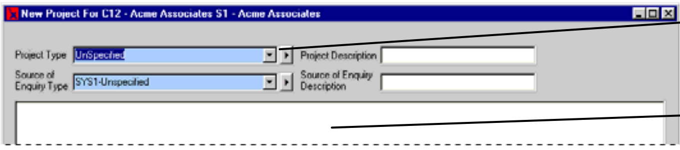
- If the Site address is the same as the Customer address, choose **Copy Details**.
- If the Site address is different from the Customer address, type the postcode and then complete the remaining fields.

2 Enter or modify the contact information. Optionally, add more contacts.

3 Optionally, to modify information in the previous screen, choose **Back**.

4 Choose **Next**. The Project screen appears (see next step).

Step 4. Take Enquiry – Project Screen



Select a Project Type or create a new one.

Type additional information here.

1 Select the Project Type. Do one of these:

- Accept the default value, which is "Unspecified".
- Select one of the pre-defined Project Types.
- Add a new Project Type. Click the arrow to obtain the Project Types Maintenance screen. See "Step 6. Add Types" on page 10 for general information about adding Types.

2 Optionally, add a description for the Project.

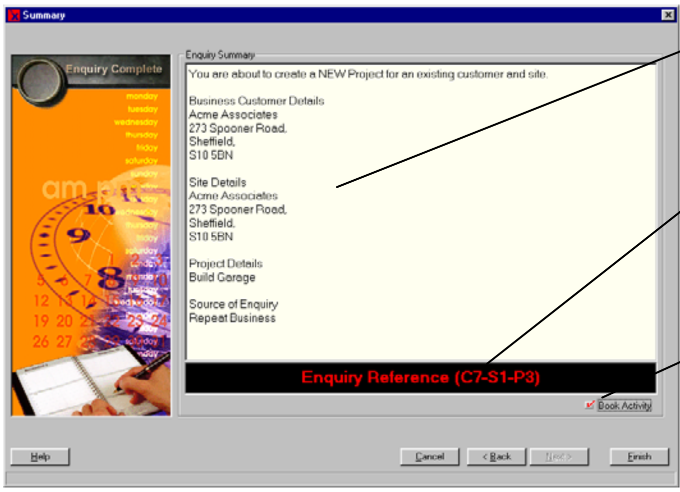
3 Select the Source of Enquiry Type (accept the default, select one or create one), and then optionally enter a description.

4 Type any additional information in the large notes field.

5 Optionally, to modify information in the previous screen, choose **Back**.

5 Choose **Next**. The Summary screen appears (see next step).

Step 5. Take Enquiry – Summary Screen



Summary of the Customer, Site, Project and Source of Enquiry.

Enquiry Reference (CSP) Numbers are automatically generated and cannot be changed.

*The **Book Activity** tick box is selected by default and automatically launches the Book Activity screen after you choose **Finish**.*

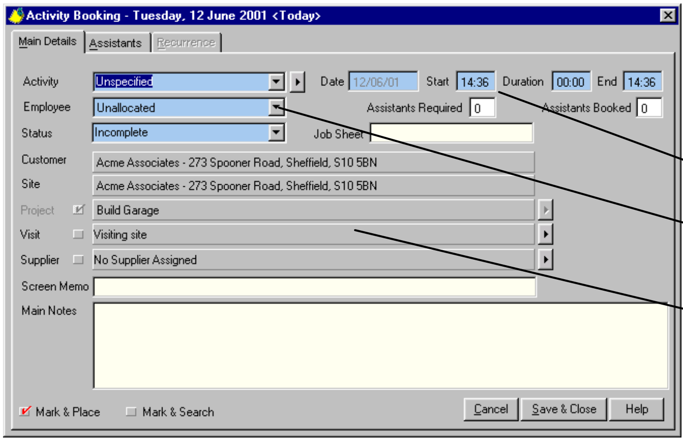
1 Check that the details displayed on the screen are correct. Optionally, to modify information in the previous screen, choose **Back**.

2 The Enquiry Reference (or CSP) number is unique to the Project. Give this number to your Customer, since it provides the quickest and most accurate way of finding a Project.

3 **Book Activity** is selected by default. We recommend that you do not de-select it. However, if you do not want to book an Activity for the Project immediately, de-select the option.

4 Choose **Finish**.

Step 6. Book an Activity



***Tip**: Use the TAB key to move between fields.*

***Do not** enter a Start time.*

***Do not** select an Employee.*

Customer, Site and Project details are automatically completed.

1 Select the Activity Type.

2 Modify the Duration if appropriate.

3 Select one of these:

- **Mark & Place** (default). If this is selected, then after you save the Activity, it will be Marked (and assigned to the Unallocated Column). You can then Place the Activity. See “Marking and Placing Activities” on page 20.

- **Mark & Search**. If this is selected, then after you save the Activity, it will be Marked and the Diary Search screen will be opened automatically using the last View that was used. You can then search for a suitable Employee to assign to the Activity. See the next chapter for help with the Diary Search screen.

  If you need to change the View, you must close the Diary Search screen, select a new View in the Diary and then re-open the Diary Search screen.

4 Choose **Save & Close** to return to the Diary Screen.

Maintaining Customer Records

The procedure described in this chapter can also be accomplished through Customer records (**Records**, **Customer** from the Diary Screen). When you do this, the Customer Selection screen appears. It is identical to the Take Enquiry screen.

Use Customer records when you want to add many Customers and Sites all at one time.

When you do this, there is no option to book an Activity on the final screen. When you choose Finish, you are returned to the Customer Selection screen, from where you can add another Customer.

CHAPTER 8

Diary Search

Use Diary Search to find Employees who are geographically nearest to the visit location of a Marked Activity or a postcode. Two examples are shown here:

- You may have just taken an enquiry for Mr. Smith and created an Activity, such as "Visit Prospect", but not yet assigned the Activity to an Employee. Therefore, that Activity would have been Marked for later Placing. Use the Diary Search to highlight Activities that are already booked in the Diary, in the order of locations closest to Mr Smith's house. You can then Place Mr Smith's Activity either before or after one of the Activities that have been found.
- You can search to find who is closest to a given postcode.

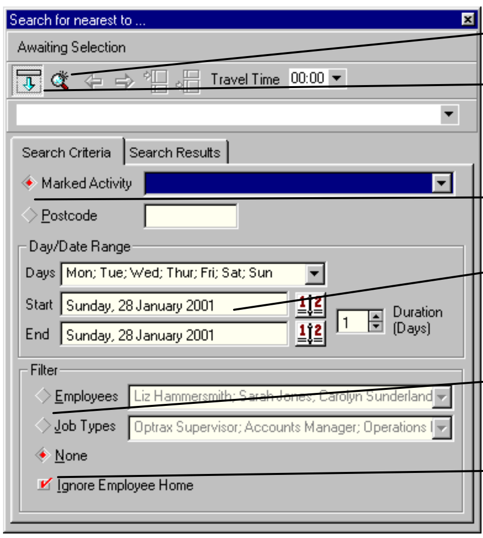
Diary Search uses the postcode to determine the search results. If an Activity does not have a postcode in the associated Site Address or Visit Address, then Optrax will not be able to find that Activity and it will not be displayed in the search results.

Diary Search works with members of the current View. It does not search for Activities in the User Column or the Unallocated Column.

Until a Marked Activity is Placed, you can open and close the Diary Search screen at any stage. You will be able to select the Marked Activity again, along with any of the values that you enter into the fields.

To search for Activities nearest to a Marked Activity or a postcode

1 Click the Search icon on the Diary Screen. The Search for nearest to … screen opens.



Search icon on Search screen.

Hide and show the lower part of screen.

Marked Activity or Postcode.

Date range specifies which Diary days will be searched.

Filters reduce the number of found Employees.

Search includes or excludes Employees' home addresses.

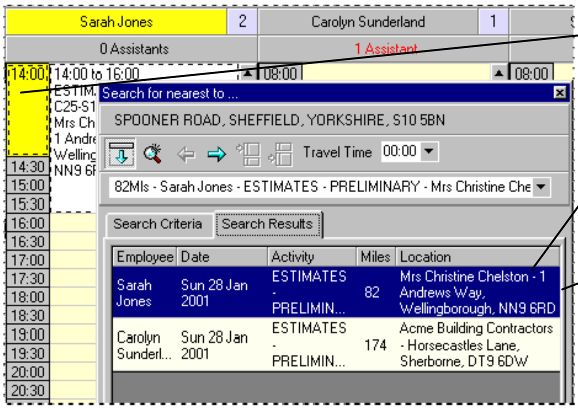
2 Do one of these:

- Select **Marked Activity**, then select the Activity from the dropdown list.
- Select **Postcode**, then type the postcode in the field.

3 Optionally, modify the date range and use the filters.

4 If **Ignore Employee Home** is selected, Employees' home addresses are not displayed in the results. Since the search is looking for actual booked Activities, it will not draw your attention to Employees' home addresses. Uncheck this to find the nearest Employee home address to a Marked Activity or postcode. This is useful for Employees who work from home.

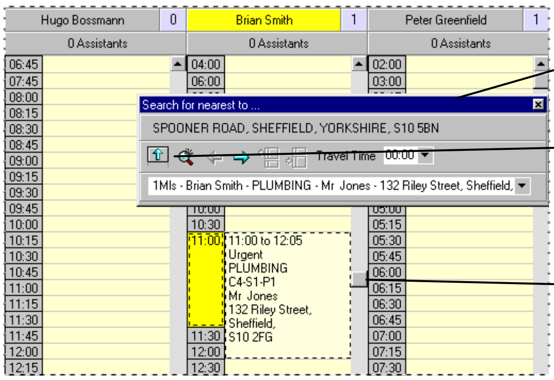
5 Click the Search icon on the screen. The Search Results tab opens and the found Activities are shown in the list. The next section explains the options.



Diary Screen automatically scrolls to selected Employee/Activity which is shown in yellow.

Results are ordered. Nearest Activity is at the top.

Tips for Viewing the Diary Screen



To move the Search screen, click on the title bar and drag to a new location.

Click here to hide the lower part of the screen. Click again to show it.

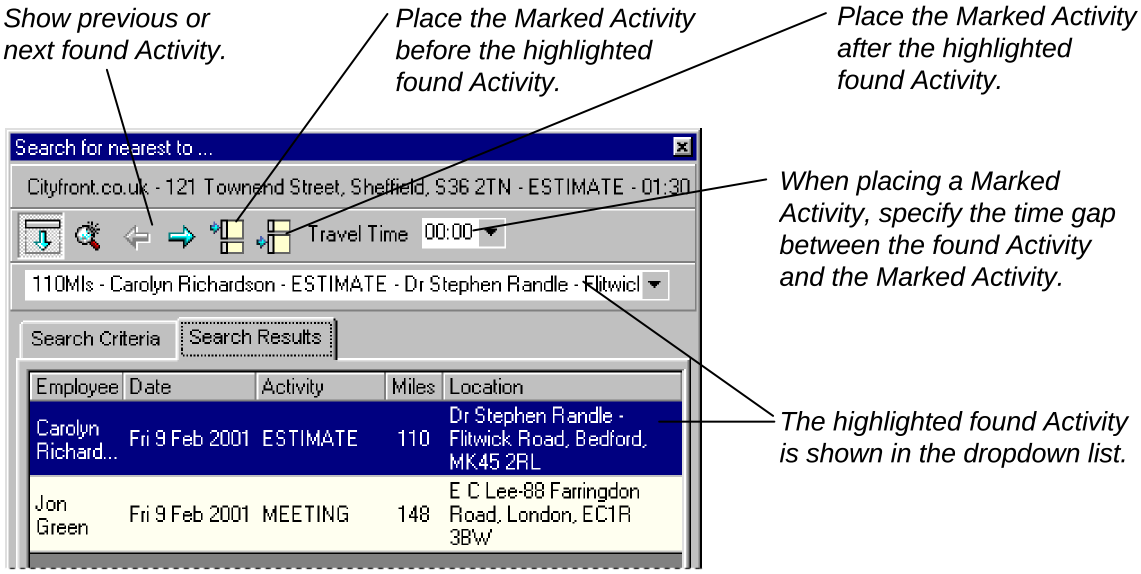
Use the scroll box to move an Activity in a column.

When the Search screen is open, you can still scroll in the Diary Screen (some other functions are not available). This is useful if you need to see what comes before an Activity that has been found in the search.

To see more of the Diary Screen when you are performing a search, minimise the Search screen by clicking on . Click again to show the lower part of the Search screen.

To move the Search screen, click on the blue title bar and drag the screen to another location.

Search Results



The distances are “as the crow flies”. Always check the expected routes, particularly with short distances — there may be a lake in the way!

If you searched for Activities closest to a Marked Activity, then the **Place Before** and **Place After** buttons are available, and you can use them to Place the Marked Activity before or after the highlighted found Activity.

To Place a Marked Activity during a Diary Search

1. Select the found Activity (from either the dropdown list or the display list, or use the scroll buttons). The Diary Screen changes to match your selection. You can scroll the Diary columns to see more information above and below the highlighted Activity.

2. Once you have decided that there is a suitable gap in which to undertake the new Activity, specify the **Travel Time** that the Employee will need for travelling between the found Activity and the Marked Activity that you are placing.

3. Place the Marked Activity by doing one of these:

   - Choose the **Place Before** button.
   - Choose the **Place After** button.
   - Close the Diary Search screen and manually Place the Marked Activity using the right-click Place menu.

   Note Until you Place a Marked Activity, you can open and close the Diary Search screen at any stage. You will be able to select the Marked Activity again and enter new values in the fields.

CHAPTER 9

Project History

The Project History screen contains a list of Activities that have been assigned to a Project. You can view, edit or delete Activities that have been assigned to a Project and you can add new Activities.

In addition to adding Activities that appear on the Diary Screen, you can add Non-Diary Activities. For example, there may be Non-Diary Activities to record project notes, phone calls, complaints and so on.

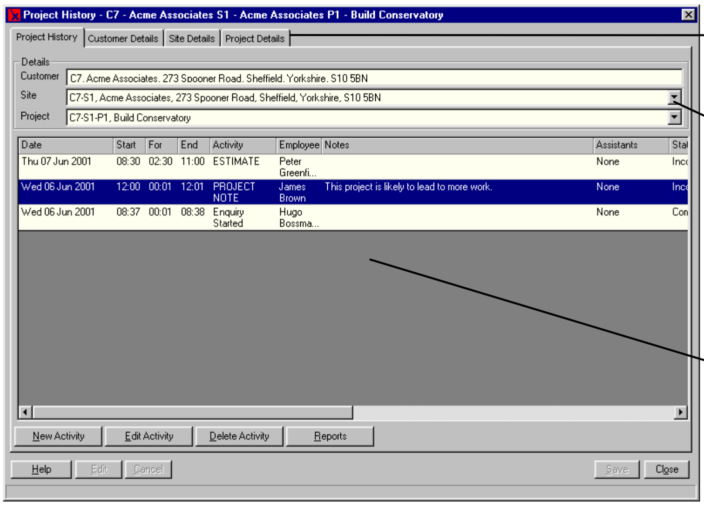
To obtain the Project History screen

1 Choose **Records**, **Customer** from the Diary Screen to obtain the Customer Search Screen.

2 Search for the Customer by typing the Surname, Company Name or Postcode and then choosing **Search**.

3 Expand the tree view and highlight the Project. (See “Opening and Closing a Tree View” on page 5.)

4 Choose **Review Project History**. The Project History screen appears.



Information on Customer, Site and Project tabs is read-only.

If there is more than one Site for a Customer, or more than one Project for a Site, you can select a different Site or Project using the dropdowns.

Activities for the selected Project appear here.

To add an Activity that will appear on the Diary Screen

1 Choose **New Activity**. The Activity Booking screen appears (see “Step 6. Book an Activity” on page 26).

2 Select the Activity Type.

3 Modify the Duration if appropriate.

Note 4. Do not enter a Start Time and do not select an Employee.

Note 5. The Customer, Site and Project information is already completed and cannot be changed.

4 If the Activity is one that can appear on the Diary Screen, the following options are available. Select one of them:

- **Mark & Place** (default). If this is selected, then after you save the Activity, it will be Marked (and assigned to the Unallocated Column) and you can Place it later.
- **Mark & Search**. If this is selected, then after you save the Activity, it will be Marked and after you close the Project History screen, the Diary Search screen will be opened automatically using the last View that was used. You can then search for a suitable Employee to assign to the Activity.

  If you need to change the View, you must close the Diary Search screen, select a new View in the Diary and then re-open the Diary Search screen.

5 Choose **Save & Close**. The Project History screen re-appears and the new Activity is shown in the list.

6 Choose **Close**.

- If you chose **Mark & Place** previously, Place the Activity (see "Marking and Placing Activities" on page 20).
- If you chose **Mark & Search** previously, the Diary Search screen appears. See the previous chapter for help with using this.

To add a Non-Diary Activity

1 Choose **New Activity**. The Activity Booking screen appears (see "Step 6. Book an Activity" on page 26).

2 Select the Activity Type. When you press the TAB key to move to the next field, the **Mark & Place** and **Mark & Search** options become unavailable.

3 Enter or select the information in the various fields for the Non-Diary Activity.

Note The Customer, Site and Project information is already completed and cannot be changed.

4 Choose **Save & Close**. The Project History screen re-appears and the new Non-Diary Activity is shown in the list.

5 Choose **Close**.

CHAPTER 10

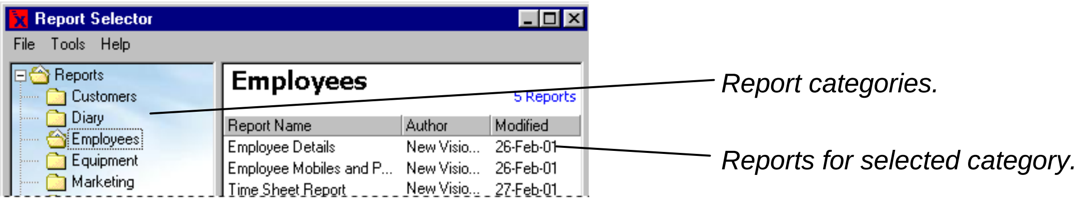
Reports

Optrax contains a set of pre-defined reports. These allow you to print information about Employees, Customers, Projects and so on.

To print a report

1 Obtain the Report Selector Screen from menu **Reports, Report Selector**. This menu option is available from most main screens including the Diary Screen.

2 The Report Selector is intuitive. If you have obtained it from the Employees Screen then the report folder called Employees will be opened for you as shown below.



3 Optionally click on the folder for any other category of report that you require. A list of reports appears.

4 Double-click a report name to obtain the Report Wizard. The screens that appear depend upon which report you selected. Typically, you would select the Employees and a date range which the report spans.

5 Follow the instructions in the Wizard. Detailed online help is available if you need it. Use the **Back** and **Next** buttons to move through the Wizard. Click **Finish** to print the report.

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