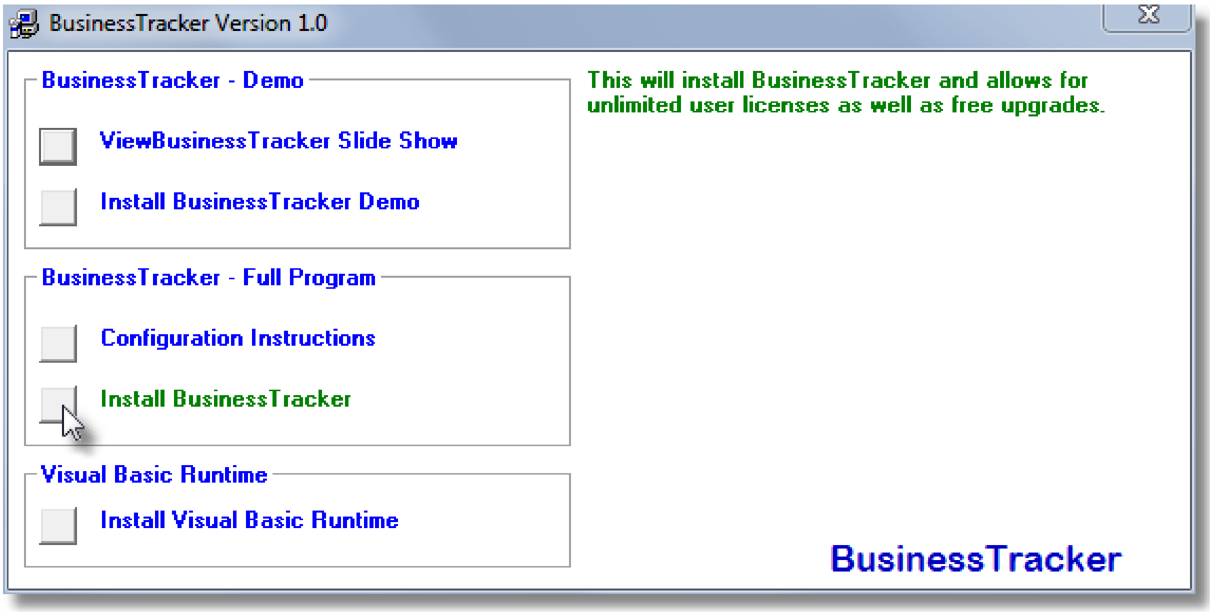
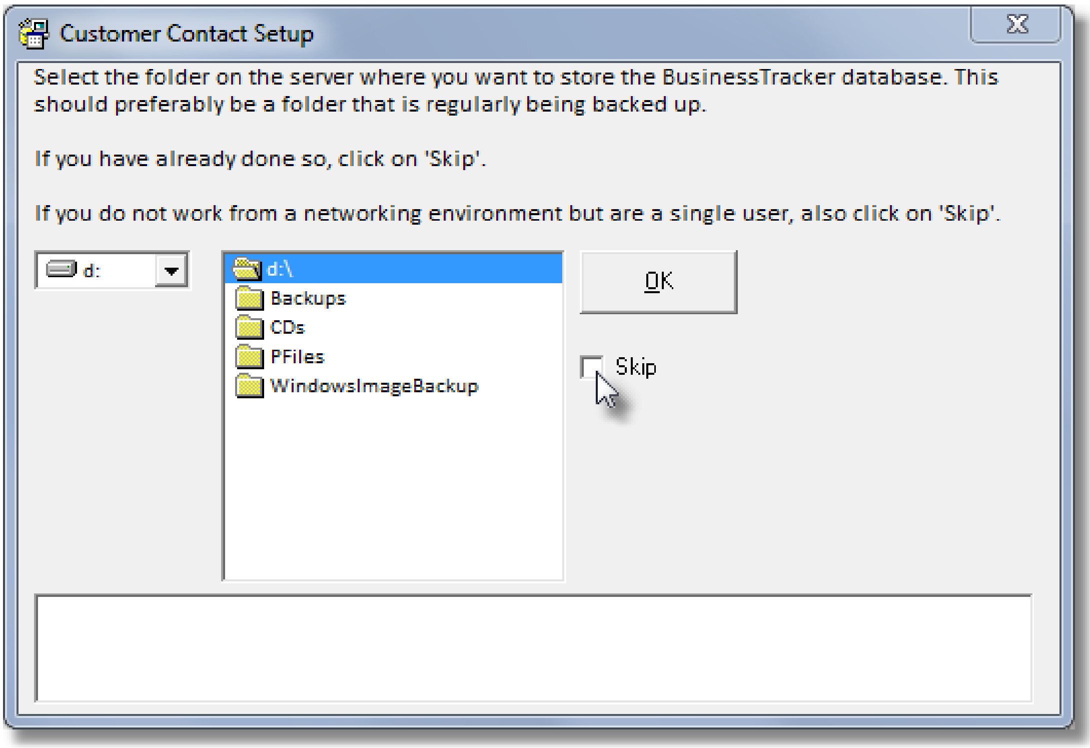
1. Installation

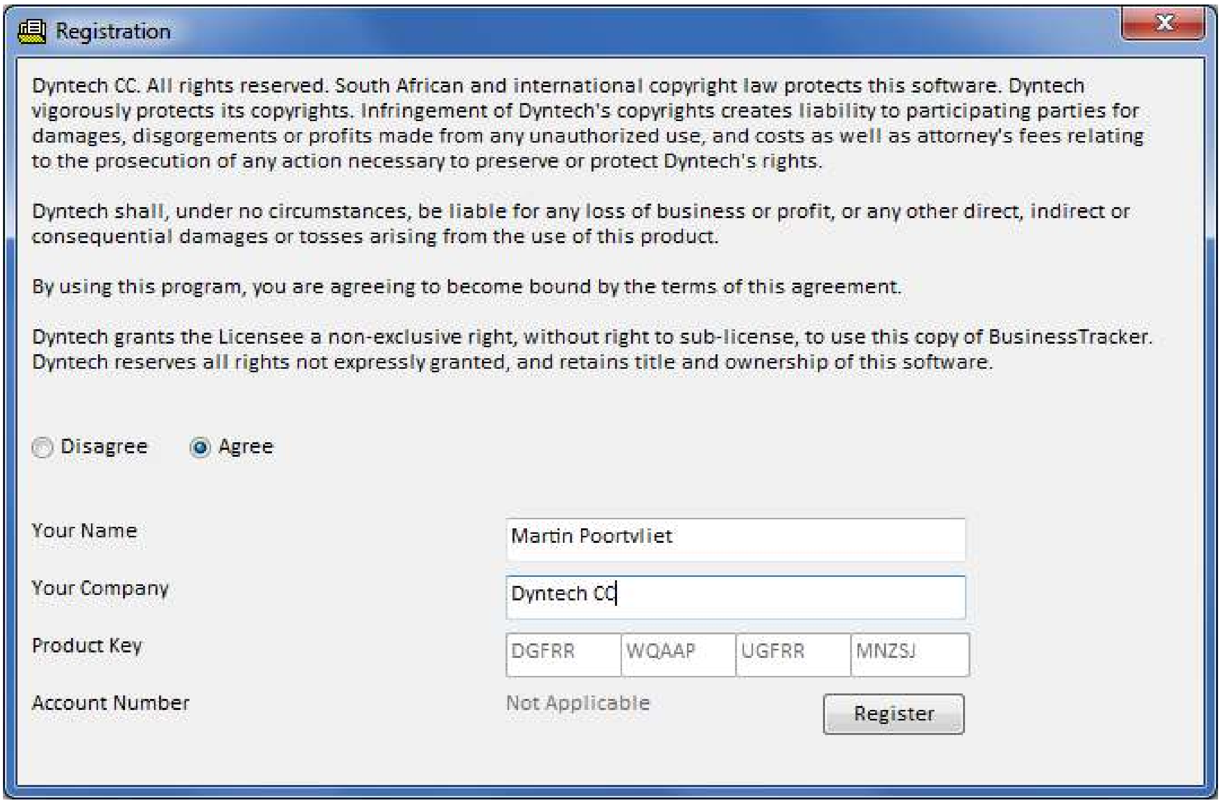
Unzip the file 'BusinessTracker.zip' and click on 'Setup.exe'. Once the program starts, click on 'Install BusinessTracker'.



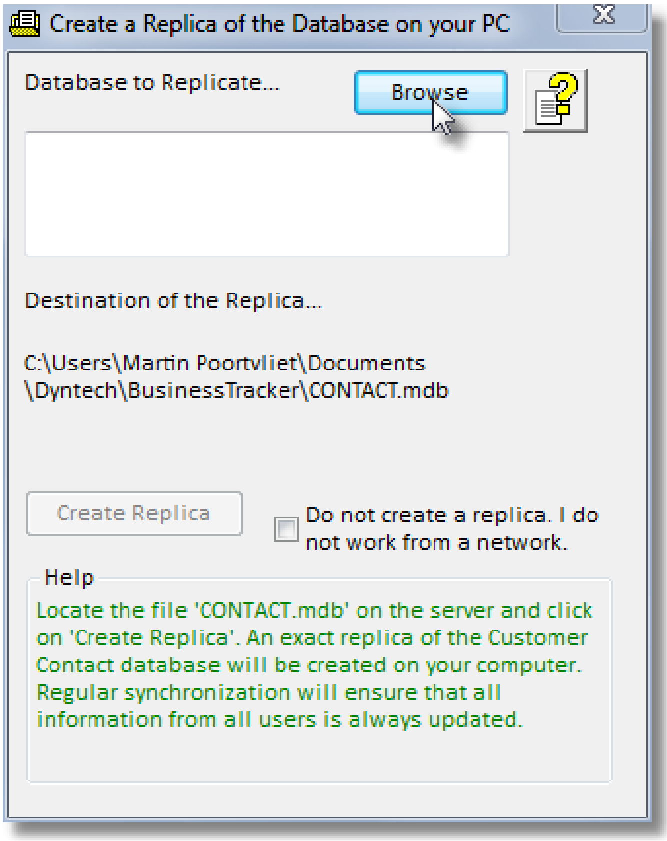


Install the database ‘CONTACT.mdb’ on the server. This should only be done ONCE. For subsequent installations, click on ‘Skip’. If you do not work from network but use a stand-alone computer, also click on ‘Skip’.

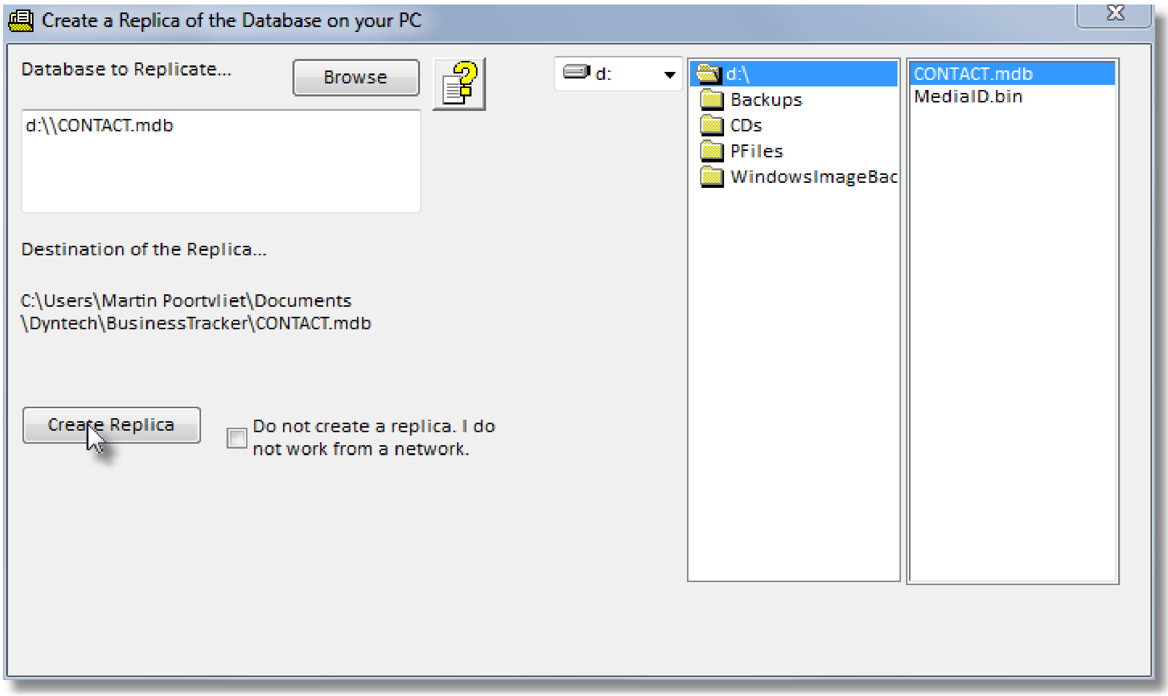
Start BusinessTracker™ and enter all relevant information.



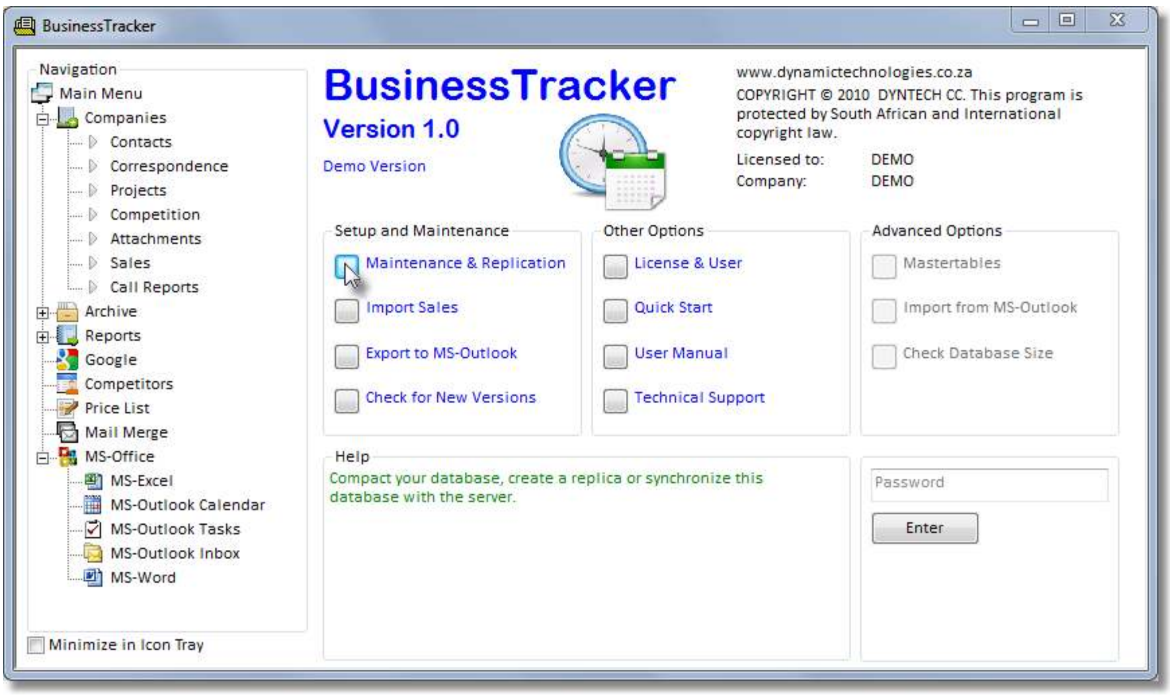
Click on ‘Register’.

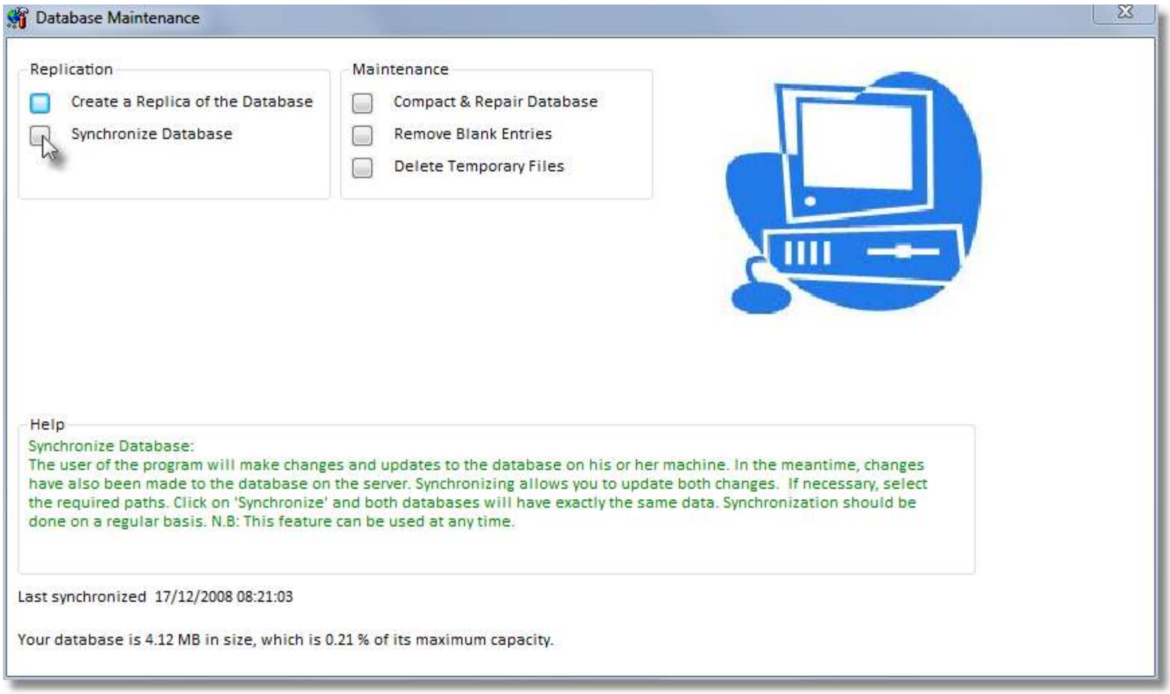


Click on ‘Browse’ and select the path to the database ‘CONTACT.mdb’, which you should have copied to the server. If do not work from a network, click the box ‘Do not create a replica. I do not work from a network’. Otherwise, click on ‘Create Replica’.



A replica of the database has been created on the user's computer. All he or she has to do now is to regularly synchronize with the database on the server, which is done from the Main Menu.





Your letterhead template is used for all correspondence (letters, faxes etc.) in the program. Your letterhead must have a header and footer with no text between the header and footer as in the following illustration:


Document1 [Compatibility Mode] - Microsoft Wo...
Header & ...
Menus
Home
Insert
Page Layout
References
Mailings
Review
View
Add-Ins
Design
Header
Footer
Page Number
Header & Footer
Date & Time
Quick Parts
Picture
Clip Art
Insert
Go to Header
Go to Footer
Navigation
Options
2.01 cm
2.01 cm
Position
Close Header and Footer
Close
Dyntech CC
PostNet Suite 192
Private Bag X2600
Houghton
2041
Tel (011) 484-0296
Fax (086) 695-6821
Dyn
Tech
2000/012511/23
DYNAMIC TECHNOLOGIES
First Page Header
First Page Footer
Dyntech CC Reg. No. 2000/012511/23. Members: M.S. Poortvliet
Running virus scan...
75%

You can edit the default letterhead, located in the folder where BusinessTracker is located or you could overwrite it with your own. Do not change the file name, which should always be 'Letterhead.dot'.

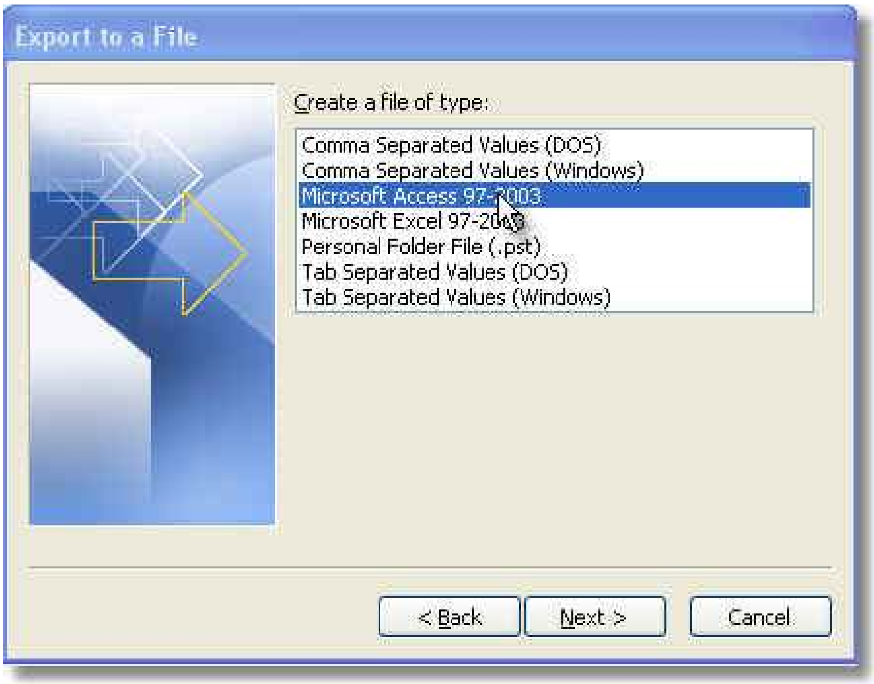
2. Importing Companies

If you have information about companies stored in MS-Outlook, you can import some of this information into BusinessTracker. The following information will be imported:
- Company name
- City
- Telephone number
- Fax number
- Website

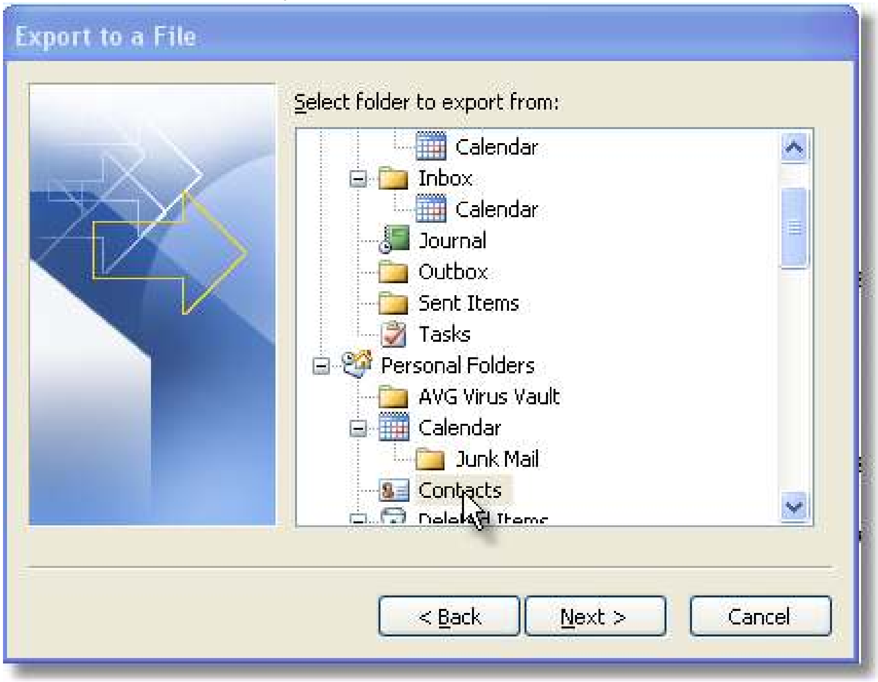
In order to import this information, you would first have to export it from MS-Outlook.

Open MS-Outlook and go to 'Contacts'.
Select File, Import and Export...
Select 'Export to a file' and click on Next.

Select 'Microsoft Access' or 'Microsoft Access 97-2003' if you have the 2007 version of MS-Office and click on Next.

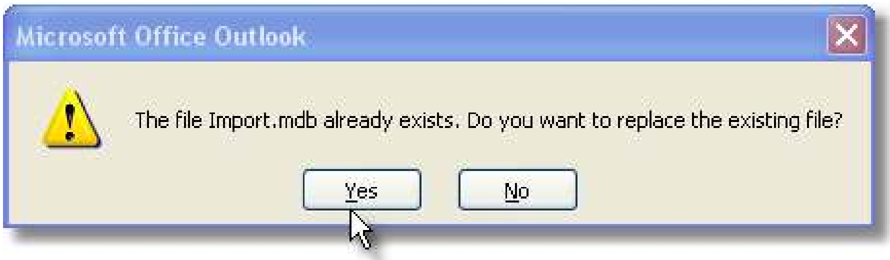


Select the folder to export from as 'Contacts' and click on Next.

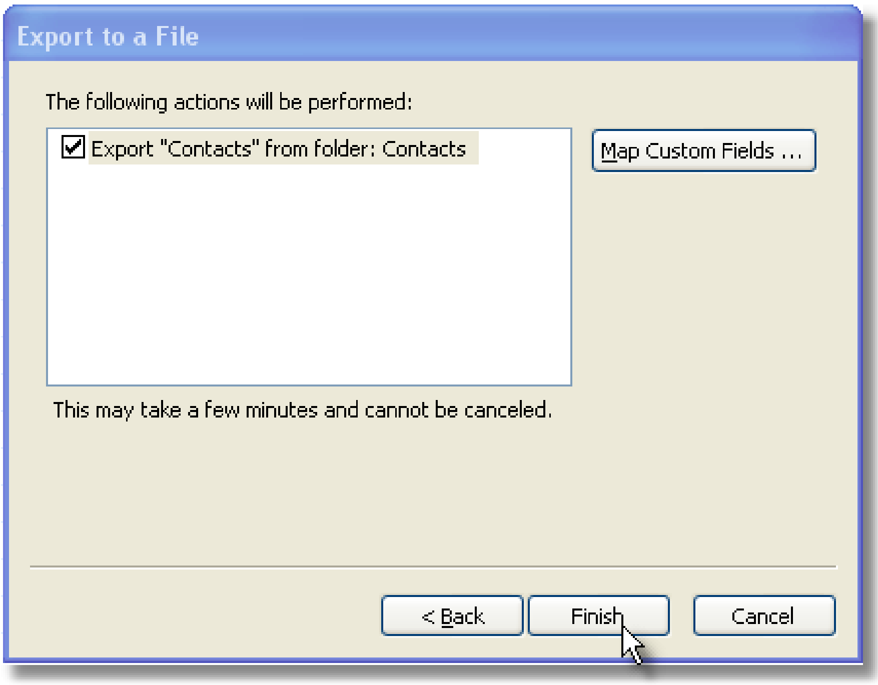


Click on 'Next' and click on 'Browse...'. Locate the database CONTACT.mdb, which is located in the folder where you installed BusinessTracker (C:\ BusinessTracker by default).

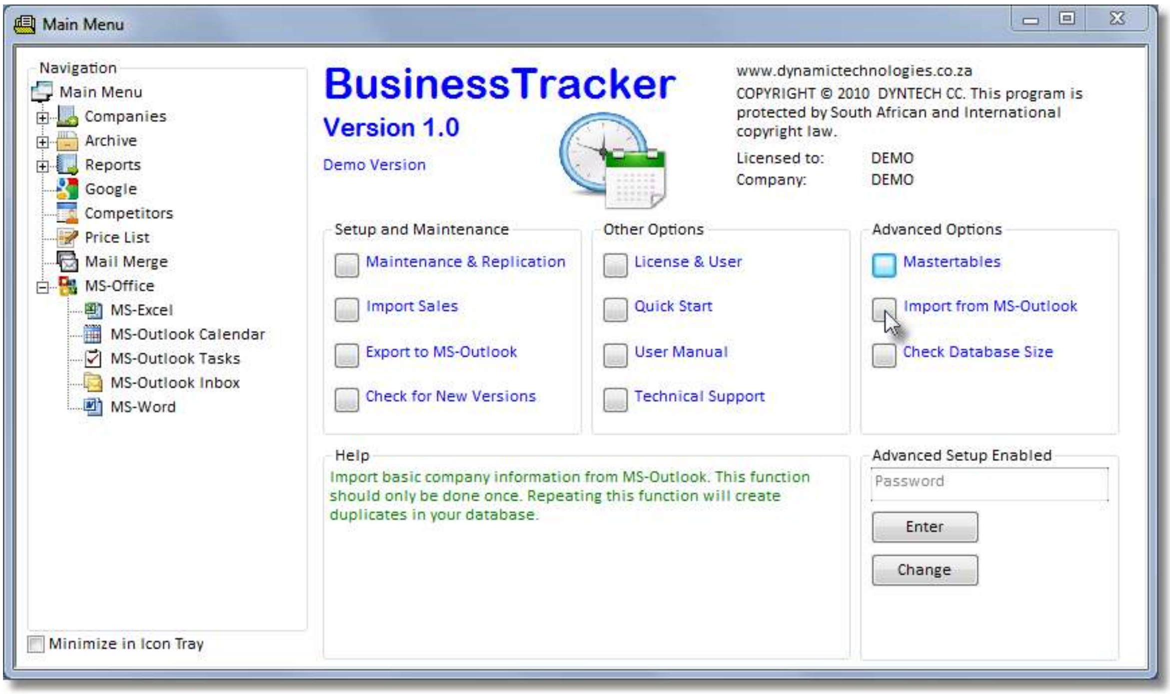
Ignore a possible warning and click on 'Yes' to proceed.



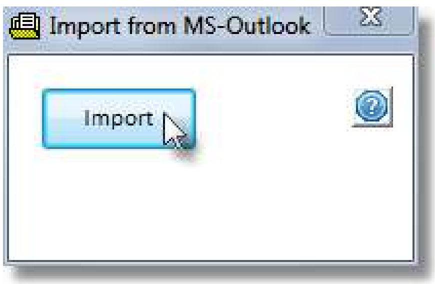
Click on ‘Finish’.



Now that the data has been exported, as a final step, you have to import it into BusinessTracker™. From the Main Menu click on ‘Import from MS-Outlook’.



Click on ‘Import’



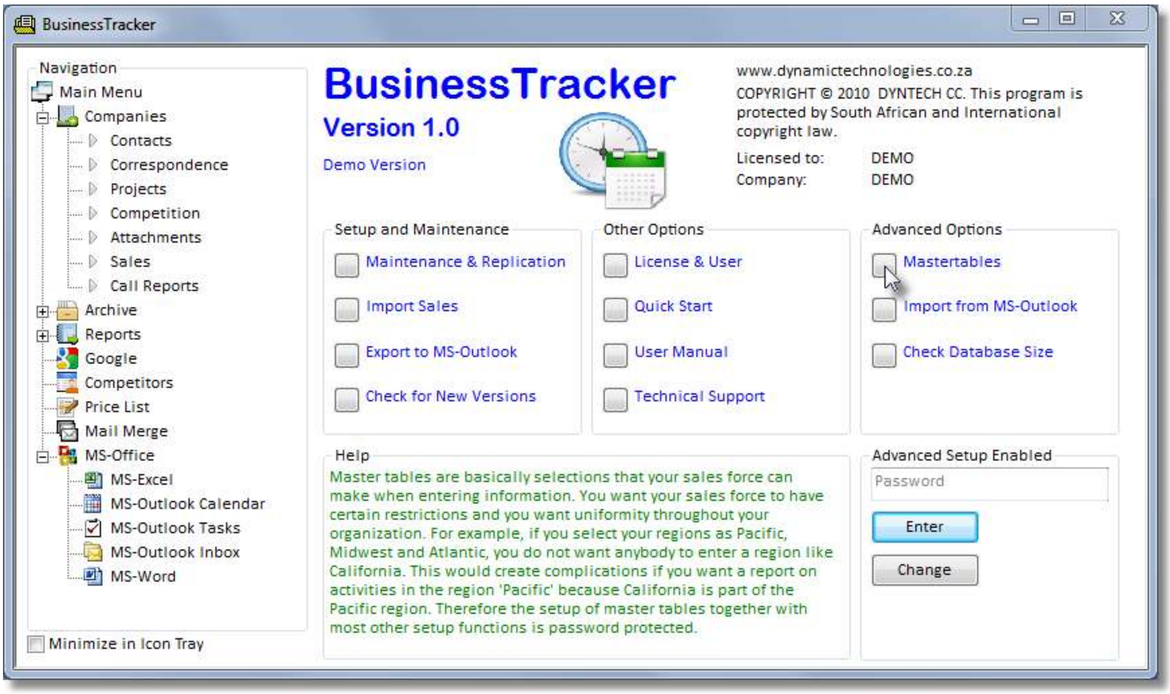
3. Mastertables

Mastertables are basically selections that your sales force can make when entering information. You want your sales force to have certain restrictions and you want uniformity throughout your organization. For example, if you select your regions as all 50 states in the USA, you do not want anybody to enter a region as ‘Southern California’. This would create a problem if you want a report on activities in the state ‘California’ because ‘Southern California’ would be treated as a separate region. Therefore the setup of master tables together with most other setup functions can be password protected and only management should have access to it. It is therefore advisable to change the password.

On the Main Menu, click on ‘Enter’. Since you haven’t changed the password yet you won’t be prompted for a password. In fact the default password, which is ‘Password’ is visible.

When you do change the password, remember that passwords are case-sensitive. If you forget your new password, it would almost be impossible to retrieve it.

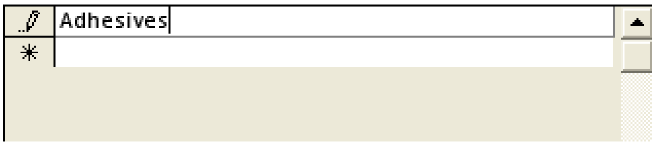
Now click on 'Mastertables'.



Mastertables have been allocated for:

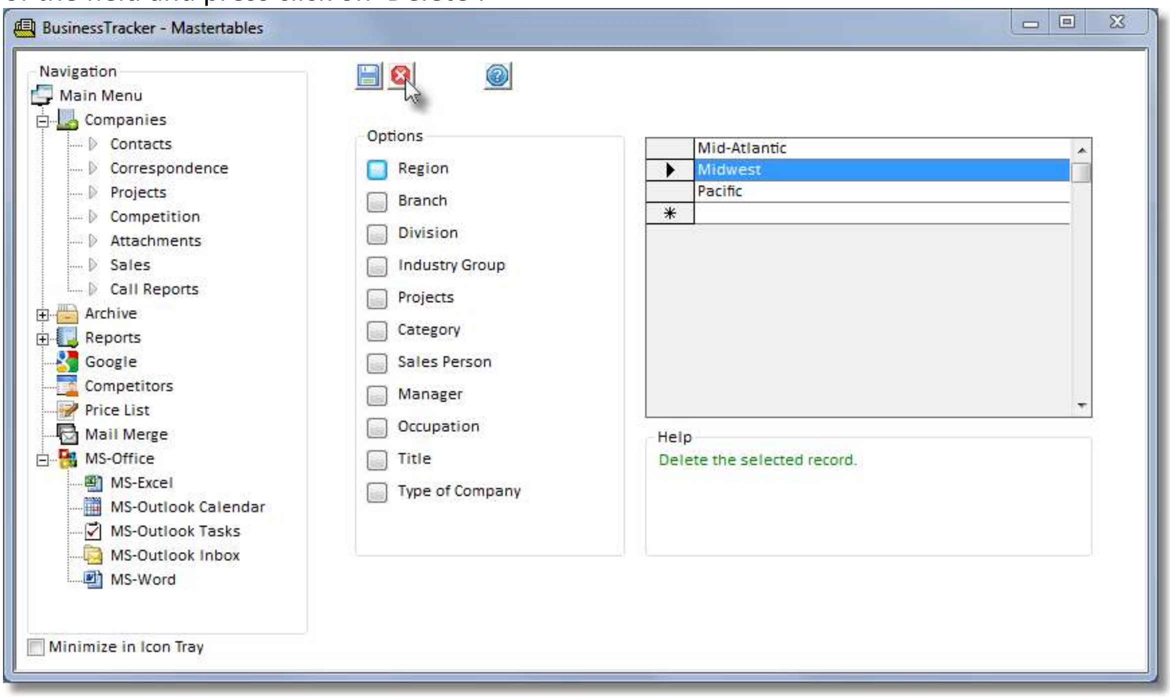
- Regions
- Branch *(only applicable if your company has different branches)*
- Division *(only applicable if your company has different divisions)*
- Industry Group *(unless your company only sells one product or one range of products, you would have different industry groups. These industry groups are used when generating projects)*
- Projects *(the name given to a particular project. This would normally be the generic name of you product)*
- Category *(you might want to categorize your customers according to importance, e.g. A, B and C)*
- Sales Person *(all sales people within your organization)*
- Sales Manager *(if applicable, all sales managers within your organization)*
- Occupation *(refers to the generic name of the function or occupation of your contacts, e.g. purchasing, technical, accounting)*
- Title *(the title of your contacts, e.g. Mr. Mrs. Dr.)*
- Type of Company *(the program is not only used for customers but also for suppliers, prospects etc.)*

To enter information into Mastertables, click on ‘Edit’, and enter the required information you want into the first empty field.



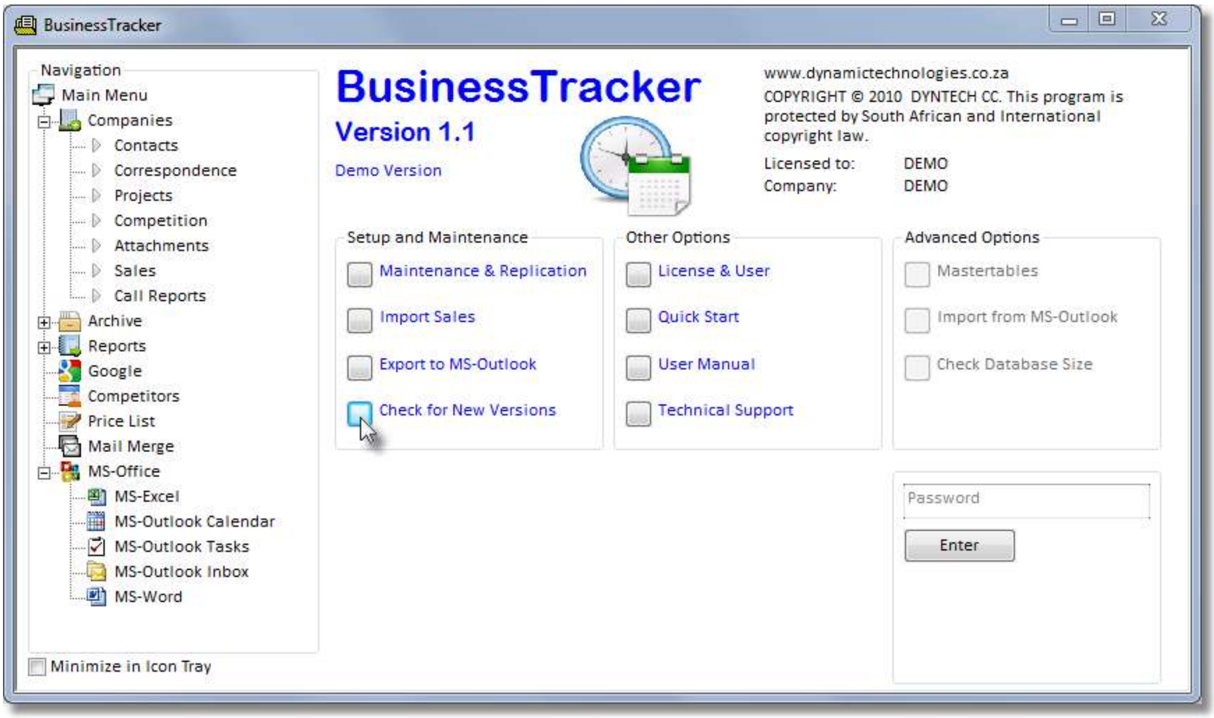
Continue entering information in the empty field below etc.

To delete information, click on ‘Edit’, select the field to be deleted, click the header on the left of the field and press click on ‘Delete’.



4. New Versions

As a last step, check whether any new versions have been released. Upgrading is quick and does not require any configuration.


BusinessTracker
Navigation
Main Menu
Companies
Contacts
Correspondence
Projects
Competition
Attachments
Sales
Call Reports
Archive
Reports
Google
Competitors
Price List
Mail Merge
MS-Office
MS-Excel
MS-Outlook Calendar
MS-Outlook Tasks
MS-Outlook Inbox
MS-Word
Minimize in Icon Tray
BusinessTracker
Version 1.1
Demo Version
www.dynamictechnologies.co.za
COPYRIGHT © 2010 DYNTECH CC. This program is protected by South African and International copyright law.
Licensed to: DEMO
Company: DEMO
Setup and Maintenance
Maintenance & Replication
Import Sales
Export to MS-Outlook
Check for New Versions
Other Options
License & User
Quick Start
User Manual
Technical Support
Advanced Options
Mastertables
Import from MS-Outlook
Check Database Size
Password
Enter