

# Accutrack<sup>®</sup>

## Business Control Software

A Fully Integrated, Windows-Based Sign Estimating and Business Software

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## What's new in Accutrack<sup>®</sup> versions 3.8.1 and 5.4.6?

### Improved Customer Tracking / Customer Cards

This major improvement to the Accutrack<sup>®</sup> Job Tracking module allows the user to create an electronic "Pending" customer card file when a proposal is written, or when an order is written. The customer card will track the customer's estimate, proposal, billing address, job-site address, and the dates associated with the proposal. These cards can be searched by company name and sub-sorted by installation address.

### Attach all associated items to the Pending Customer Tracking Card

You can "paperclip" all correspondence with your customer regarding a specific job or proposal to the customer card.

Attach site-surveys, JPG photo files of the site, artwork & designs, permit applications, technical drawings, engineering results, etc. to this central place where system users can find all information about this pending quote. When the proposal is accepted, the pending customer card is updated to reference the correct order number.

When the job is completed and job-costing is complete, the completed job report is attached, and the list of materials used on the job is automatically written into the card. The card is then automatically converted to a Closed Manufacturing Order Card, or a Closed Job-Order Card to store all of these items in a permanent historical record which can be referenced by Accutrack users in the future.

### Maintenance Department Added

With this release, the estimator can use miscellaneous item entry screens to build estimates for servicing or repairing signs in a distinct department for "Maintenance" (service work).

A separate truck rate can be established for this department and used for quoting a second truck on any Job Site for any job.

### Open Architecture for estimating materials

With prior Accutrack functionality, users could type in "Miscellaneous Items" added into any estimate to add non-standard items.

With the latest Accutrack update, the user can now create additional items in any department, to facilitate special items that are used repeatedly by your company. The system will store whatever cost per unit you define for the item.

At the "Miscellaneous Items" screen the user can now press the TAB key and view/select all standard or special user-added items in the materials database to include in your estimate. The markup for that department is automatically entered into the screen. The user then defines quantities and labor parameters for the item.

For these "User-added" items, the system will allow users to delete these items, but if the user attempts to delete a default Accutrack material item, the system will prevent them from doing so, and display an error message accordingly.

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### Job Description Addendum page:

This improvement is targeted for those jobs or projects that have extremely long job descriptions or multiple sections created on one estimate.

This new feature will give the user the option to create a Word Document which details the exact specifications. It can be saved in any folder, or attached to the appropriate customer card. The Word document addendum facilitates long, custom-formatted project descriptions in outline form, or in separate numbered sections. Indentations, multiple font sizes, colors, etc. are allowed in the Word Document addendum. The addendum can be used in conjunction with proposals, work-orders, or customer correspondence.

### Polycarbonate materials added for Channel Letters

Another improvement to the estimating module allows users to create estimates for reverse channel letters with clear polycarbonate backs. This will make it easier to create quotes for those jobs with pegged-out letters with "halo lighting".

### Improved Architecture for face materials and edging options for Channel Letters

This feature has been improved to assist Accutrack users with dissimilar back & edging material thicknesses or material types. If reverse channel letters require a thicker material for the face than is used on the edging, the system now accommodates those combinations when creating the estimate.

### Auto-Numbering for Proposals

It is a breeze to create proposals from the estimate file using Accutrack Proposal Writer Module. This module has been improved to automatically increment proposal numbers. The proposal template can be customized by the user to include their company's logo, and change wording that appears on proposal forms.

### Most Recently Used Estimates List

When creating or modifying estimates, the user can now select from a list of the 9 most recently created estimates.

### Export/Import Inventory items to & from Excel

To enter or update your material costs into Accutrack's estimating database, you can now export our default inventory items and their costs into Excel. Update the materials you use the most with your company's most recent cost information and simply import the information back into Accutrack. This makes system updates and cost updating quick and simple.

### Other Improvements and Fixes:

Additional improvements include an expanded list of routable materials at the appropriate screens, USB dongle protocol improvements for network applications, zip codes, ship dates, and customer ID's on Work Orders, and improvements to the awning estimating screens & functionality. The many improvements in this version make Accutrack more flexible, powerful, and user-friendly than ever before.