



CUSTRACK

BUSINESS MANAGEMENT SYSTEM

Welcome to the Custrack Business Management System - Responding to a growing need in the direct marketing industry, Custrack was designed to assist a company in all aspects of database manipulation, marketing exercises and sales forecasting and control.

This program will allow the user to:

- build up a relationship with an existing customer
- prospect for new business
- monitor a sales process from first contact to deal concluded
- exercise sales pipeline control
- keeping track of installed products with serial numbers etc.
- keeping track of all contacts made with a company and it's employees
- scheduling follow up calls
- organizing an event from inviting delegates to marking them as having attended
- logging and keeping track of support calls up to finding a solution
- keeping track of employee's whereabouts through the electronic in-out board

What you need to run Custrack

Hardware requirements Client:

The following is the minimum hardware that is required to run the Custrack_System:

- Pentium, Recommended 600 MHz or higher
- 128 MB RAM
- Super VGA screen and card capable of resolution of 1024 by 768.
- 150 MB free disk space

Software requirements Client:

The following is the minimum software that is required to run the Custrack_System:

- Microsoft Windows ME/2000/XP or NT with Microsoft Office 2000/XP, with ODBC and drivers for Microsoft Access and SQL Server Installed.
- Microsoft Outlook with Messaging installed.
- Microsoft SQL Server version 2000 upwards with Microsoft SQL Client Licenses to run the database and client access
- TCP/IP Protocol Installed and Configured.

Hardware Requirements Server:

The following is the minimum hardware that is required to run the Custrack_Server:

- Pentium, Recommended 1000 MHz or higher with dual processor in larger sites
- 512 MB RAM
- 14 inch Super VGA screen and card capable of resolution of 1024 by 768
- 500 MB free disk space

Software requirements Server:

The following is the software that is required to run the Custrack_Server:

- Microsoft Windows NT/2000/XP with Microsoft SQL Server or MSDE (Microsoft Desktop database) for small sites less than 5 users.
- TCP/IP Protocol Installed and Configured.

Internet / Mobile Server

The following is the minimum software that is required to run the Custrack_Internet Server or Custrack_Mobile:

- NT/2000 Server, with latest service packs applied
- Internet Information Server and .NET Framework 1.1
- Internet Connectivity and/or Remote Access

Please ensure that all applicable server packs are installed.

Wide Area Network requirements

- Microsoft NT/2000 Server– all latest service packs applied
- SQL Server Version 2000
- Minimum 128 KB Bandwidth available and not shared
- TCP/IP Protocol Installed and Configured.

Please ensure that all applicable server packs are installed.

Microsoft TCP/IP with Windows name resolution MUST be installed and configured.

SMS Server and Client Requirements

SMS Modem – contact us for supplier details

Sim Card

1 Custrack Client

Contract with Service Provider – preferably SMS contract

Registration of Custrack

The Custrack multi user starter pack contains the set-up CD for the Custrack software and an empty Microsoft Access database into which you can load your information. It is supplied with a license key that entitles you to run the system with 1 registered user on a local area network. Each license key is serialized and will be registered in your company name. These license keys are not transferable to any party or person without the prior written consent of Custrack.

The number of users can be increased in groups of 5. This is a license upgrade only and does not involve any software or documentation. A new license key for the increased number of users will be issued.

Getting Started

Chapter 1 - Setting up Custrack

In order to install Custrack, you need the Custrack Set-up CD –Server as well as Client - as well as an empty database provided by Custrack, or the database provided by your database provider – This database MUST be in the Custrack_Format. You also need the license key, provided by Ko-All Consultants

NB – Remember to uninstall any previous versions of Custrack first !

Custrack Server:

NT/2000/XP Server: Close the Custrack Server – stop the service
Open the DOS Command
Change directory to C:\CUSTRACK
Type in: Protoserv –uninstall
Go to Settings, Control Panel, Add/Remove Programs
Uninstall Custrack Server

Windows9X: Close the Custrack Server

Workstation Go to Settings, Control Panel, Add/Remove Programs
Uninstall Custrack Server

Custrack Client:

Windows: Close the Custrack Management System
Workstation Go to Settings, Control Panel, Add/Remove Programs
Uninstall Custrack Client

NB – Should you encounter any problems or error messages on an XP/NT/Windows 2000 server, then remember to look in the Event Log for the description of those errors!!!!

Installing Custrack Server on Windows NT/2000 Workstation or NT /2000 Server

NB – This procedure might require shutdown/reboot of the NT-Server !!

Insert the Custrack CD into the CD-ROM Drive

From within Windows, please make sure that all applications are closed - use Task Manager to close all open applications - Very important!

CD Drive: From Windows Start , Select File and Run and then use Browse to select the D:\ Custrack 2005\Custrack 8\ directory on the CD, then locate the SETUP.exe and then select OK

On older versions of Windows, the Installshield application might ask you up to 3 times to re-boot your machine. Please do so, the setup will just continue each time, not necessary to activate it again!

Follow all the instructions to install – the Wizard will guide you: After agreeing to the license agreement, click on the Choose Components to Install Option.

This window will allow you to choose all the elements to install. Make sure that only the Custrack Server NT/2000 is selected.

Click Next, Then Install to Finish.

Restart NT if requested – NB!!!!!!

To Install the Custrack Server as an NT Service type, from the DOS Prompt in the directory where you installed the Server: type in (Use Start, Run, CMD, OK to get to DOS, the CD\Custrack)

C:\Custrack\Protserv –install then press ENTER

You will be requested to supply the correct authorisation string, supplied to you by Ko-All Consultants – please type in UPPER CASE

NB: The authorisation string can be found in your CD Case.

You will then be prompted for various options as follows:

If you use Invoicing:

The Pastel Path
The Pastel Tax Type Code to use

If you choose to use SMS:

The comm. Port on which the GSM Modem has been installed.
The Message you want to use when sending Birthday SMS's

Choose your InOut Database Format:

Access is the default
Choose if you want to escalate support calls:

Supply the User Profile name for sending mail from the server.
Supply the password for that user profile.
Supply the period in seconds to check for escalations – e.g. 3600

Using Start. Programs, Administrative Tools, Services, make sure that the Custrack Server is started as a service

Obtaining IP Address for Windows XP/ NT/2000 Server

Start, Programs, MS-DOS, IPCONFIG enter

Obtaining IP Address for Windows 95/98/Millennium Host

Start, Run , WINIPCFG OK

Installing the Access Database

From Windows Explorer, create a specific directory where the database needs to reside - either on the local drive, or on an approved network drive - preferably not in the C:\CUSTRACK directory

From the CD, copy the file PROSDATA.MDB from the DATABASE directory into this new directory.

Use Windows Explorer to go into the properties of this new database and take the READ ONLY flag off.

Installing the SQL Server Database

From the Custrack CD, copy the Prosdata.Bak file from the \SQL_Database directory.

Restore the database in SQL Server 7.0 to your Data Server.

On the Client – Create an SQL ODBC Data Source to the SQL Database

On the Client - From the Custrack CD, copy the Local_Proadata.MDB file from the \Custrack_Database directory into your c:\CUSTRACK directory

Remember to unflag the Read-Only Property on this database

Open the Local_Proadata.MDB, and link tables to the SQL Data Source – Remember to click on 'Remember Password' when linking the Tables

To get rid of the 'dbo_' prefix on the tables, run the Module1 module

Remember to use this Local_Database.MDB as the database for Custrack.

Installing Custrack as a Client

Insert the Custrack CD into the CD-ROM Drive

From within Windows, please make sure that all applications are closed - use Task Manager to close all open applications - Very important!

From Windows Start , Select File and Run

and then use Browse to select the General Setup directory on the CD, then locate the SETUP.exe on the D:\Custrack 2005\Custrack 8\ directory on the CD and then select OK

Follow all the instructions to install – the Wizard will guide you: After agreeing to the license agreement, click on the

Choose the 'Client and Documentation Only' Option – this will install the Custrack Client, as well as the Custrack Manual

Should you choose to install other options, then choose the 'Choose Components to Install' Option, and make sure that only the required options are clicked.

Click Next, Then Install to Finish.

Restart Windows if so requested.

Once the installation is complete, please make sure that Microsoft Outlook is set-up properly - either connected to an existing network post office, or as a standalone post office.

When you start Custrack for the first time you will be asked to complete setup information. See Executing Custrack for the first time.

Please check the date format on the client PC – using Settings, Control Panel, regional settings, ensure that the language is English (South Africa), that the short date is dd/MM/yyyy, and that the long date is dd MMM yyyy

Executing Custrack for the first time

Please make sure that you know beforehand the IP addresses, or the host names of both the PC that the Custrack Client resides on, as well as the Server where the Custrack Server is installed.

If both Custrack Server and Custrack Client are installed on the same machine, then you could use localhost for both instances.

On executing Custrack from Program Manager, you will be prompted for:

The local database name: PROSLOC.MDB, preceded by the full path where you installed Custrack into:, e.g.

C: \CUSTRACK\PROSLOC.MDB

Should you keep on getting an error that says this database is invalid, please check in Windows Explorer that the READ ONLY flag is off!

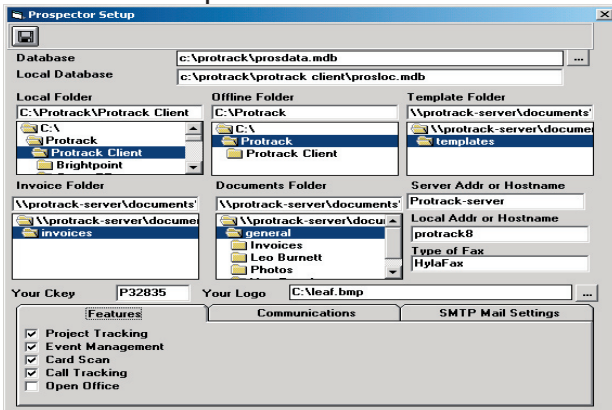
You will get three 'error messages'

- 'invalid path',
- invalid document path',
- invalid database path' –

please click OK on each of these messages.

The following window will appear only once, to establish the location of the database: - In this Window, you have to specify three locations:

Custrack Setup Window



- The location of the database - click on browse (the square button with three dots (...)), and then point to the location of the database (called PROSDATA.MDB), either on the local C: drive (especially when it is the ODBC linked database to the SQL database), or on the appropriate network drive
- The local database name, e.g., C:\Custrack\prosloc.mdb
- Local Folder – normally C:\CUSTRACK – the location of the installed Custrack Client – This directory contains all the report and picture files.
- Offline Folder – The folder where the offline/mobile export Database is stored – only if you are licensed to use this facility - normally C:\Export if licensed, otherwise C:\Custrack
- Template Folder – mapped directory on server where document templates are stored – NB when using Mapped drives, then ALL users must have the SAME map drive for this director!
- Invoice Folder – Folder to contain invoices - If you are using Custrack to generate Pastel Maintenance, Events or Support Call Invoices
- Documents Folder – Default Documents Directory
- Your Ckey – the company key of your own company record on this database
- Your logo – the path to your company logo (this and the Your Ckey will be used to print your details on envelopes)
- This logo must be small enough to print on the left top corner of a DL envelope, together with your company information, eg:



Ko-All Consultants
P O Box 922
2153 Jukskei Park

Company ABCDEF
Mr Joe Soap
P O Box 7897654
Johannesburg
20000

Communication Settings: - only to be filled in when used for Faxing or Dialing

- Dialing Prefix – e.g 0 when outside line is requested, otherwise None
- Fax Server Code – Dialing code of area where Fax Server resides
- Comm Port – Comm Port of attached modem
- Pulse Tone
- Baud rate
- Local Code
- Type of Fax

Addresses: These are compulsory

The normal IP address can be specified but not when DHCP is used.

The alternative is to use host names, but then WINS or DNS must be in use

- Server Address or Host Name
- Local Address or Host Name

The Type of fax: Choose the correct one or just type in any one if you do not have a Fax Package installed yet, e.g. WinFax

Features: - These are compulsory –

Each individual Custrack User needs to set the correct flags for the features that he/she is licensed for – The Custrack Server will control access to these features.

SMTP: - These are compulsory IF YOU WANT TO SEND E-MAILS VIA YOUR SMTP SERVER

The normal IP address of the SMTP server must be specified, as well as the e-mail address that will appear on the sent e-mail

Once this Window is filled in correctly, click on the Update Icon (the diskette) -This will result in returning to Windows. After a successful sign-on procedure, you will be presented with the Custrack Desktop Window.

Signing on to Custrack:

The following Sign-On Window will now appear:

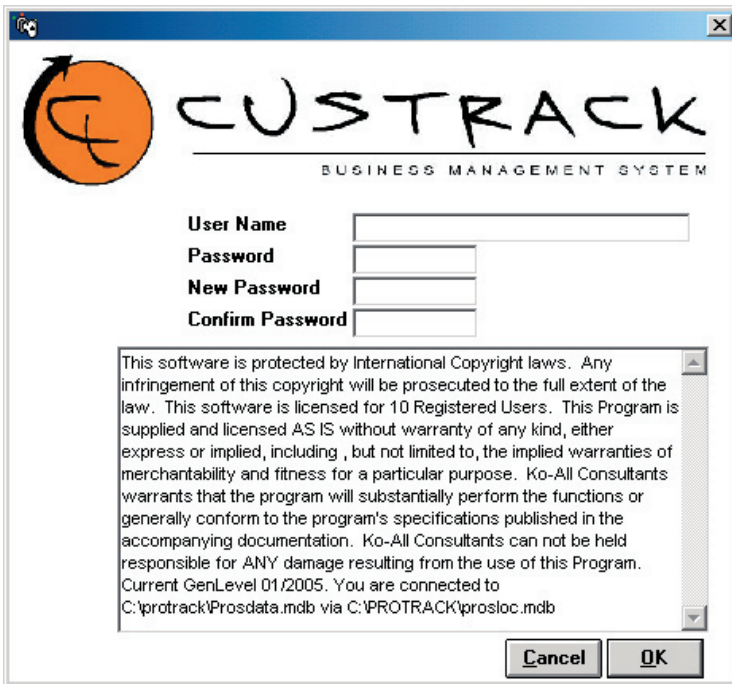
NB: If you cannot see the number of licensed users in the Copyright box, then you ARE NOT LINKED TO THE Custrack SERVER.

Attempting to sign in will result in the following message:

'Server not found – do you wish to work in your offline folder?'

If you are not licensed to work in an offline mode, then answer NO, and contact your Custrack Administrator – your PC is not acknowledging the Custrack Server via the IP network.

Should you want to check your settings, you could click on Setup. (extend the window if this button is not available)



If all is OK, then:

Please type in 'Administrator' the first time (password = admin) (afterwards the Administrator of the system will allocate the correct sign-on names for authorised users.)

Type a new and confirmed password for administrator, and then click on OK

A confirmation of the password window will appear - press OK

To change the license key, the name of the local database, or the IP settings, the Windows registry Editor can be used:

From Windows Start

Choose RUN

Open REGEDIT, OK

Choose :

HKEY_CURRENT_USER\Software\VB and VBA Program Settings\InOut\Global

Or

HKEY_CURRENT_USER\Software\VB and VBA Program Settings\Custrack\Globals

Or Windows 98

HKEY_CURRENT_USER\Software\VB and VBA Program Settings\Custrack\Licence

Window XP, NT, 2000

HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\ProtServer\Parameters

To edit any of the settings, right click on the parameter, and MODIFY

Installing the Internet Version

1. Run the Setup program from the Custrack CD (on the NT server)
2. Copy the images directory from the setup to the new installed directory
3. Create an ODBC datasource in System DSN's with the name of Custrack and point it to your Custrack database
4. In Internet Services Manager under Default Web Site, create a new Virtual Directory and give it the alias Custrack, and point the site content directory to the newly installed directory.
5. Test using Internet Explorer with address localhost/Custrack/Custrack.ASP. You should see the login screen and must be able to log on.
6. From the rest of the network the site is accessed as: <http://hostname/Custrack/Custrack.ASP>

Installing Hylafax on the Client

1. Install Python 1.5
2. Install Python Win32 Extensions
3. Install Ghostview
4. Install W2HFAX
5. Install Ghostscript
6. Register Hylafax by Running: C:\PROGRAM FILES\W2HFAX\HFAXCOM.PY
7. Add a Printer with driver 'Applelaser Writer Postscript', name = CustrackFax
8. Add to the Registry:
HKEY_CURRENT_USER\Software\VB and VBA Program Settings\Custrack\HylaFax
Add entry SERVER with the Hylafax Server Address

Setting up users on Hylafax Server

1. Hylafax server must be installed
2. POP3 (imap2000 or other) must be installed
3. Linux Hostname must be configured (eg. Faxserver.domain.com)
4. A Linux user must be created for every Custrack Fax Client
5. Faxadduser must be run for every Custrack Fax Client
6. On Custrack Admin Functions Employees – Login user must match Linux User and domain must match domain name of Linux.