TeleTracker Quick Start Guide

The very first thing you must do after receiving the email from your sales rep is download TeleTracker to every computer that will be using TeleTracker. Download site:
https://www.teletracker.com/ttonline.htm

Your TeleTracker sales rep sent you an email with all the information you will need to set the internet connection settings in TeleTracker. The email will look like the picture below.

(1) Enter your internet connection settings from the email into TeleTracker.

(2) Change the Screen Timeout to 999

(3) Change the Report Timeout to 999

(4) Click on the Skip Ping at Startup box. Make sure it has the ✓ in the box after you click on the box.
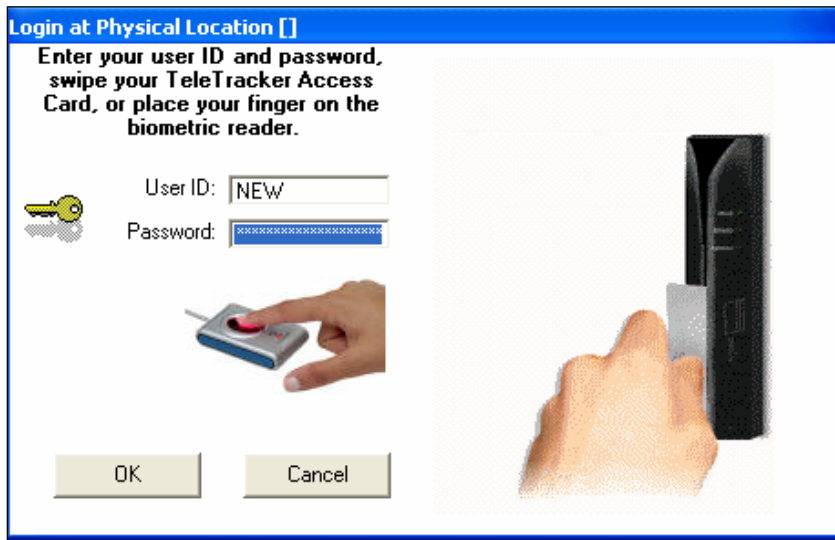
(5) Click Apply.

(6) Click OK.

Change both of these to 999

Leave this empty for now.

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After setting up the Internet Connection Settings you will log into TeleTracker using NEW for the User ID and NEW for the password. NOTE: You will never see the password. The password box will always appear as ************.

When you log in it will ask for you to set workstation settings. Set the Station #: to 1
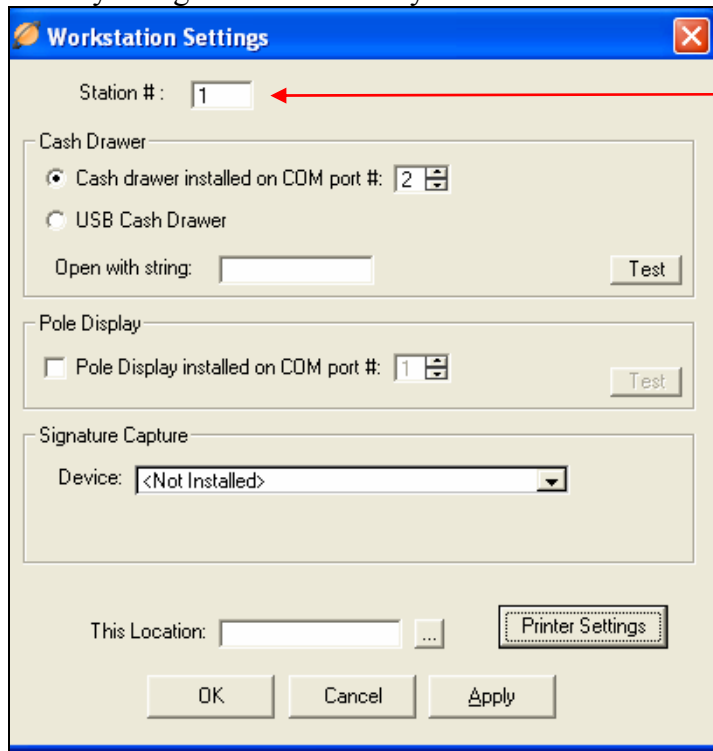
TeleTracker Quick Start Guide

Step 1: Master Files → Locations

Your TeleTracker database comes pre-loaded with most of the basic setup completed. However, there are a few areas that are unique to your business that you will have to complete. Follow this guide step-by-step and you should be done in minutes.

- **Locations**: I highly recommend that you view this video that shows you step-by-step how to setup locations. Click on this link. http://www.teletracker.com/movies/locations.htm

- **(1) Your database comes with 1 Store**. If you have purchased more than one license, **this is where you will add the additional stores/locations**. The training video shows you how to add locations and Inventory bins.

  o **(2) Inventory Bins.** Your database comes preloaded with 3 bins. To access the bins, click on the + sign next to your store location. You can rename these anything you like.

    - **Sales:** All the inventory you will be selling is stored in this bin.

    - **Returns:** If you allow returns, this bin can be used to store the returned inventory until you determine whether it can be sold again or needs to be removed from your inventory.

    - **RMA: Return Merchandise Authorization.** This is a defective phone or product you are sending back to the vendor for a credit.

  o **(3) Address and Contact Information:** Put in your company name and individual store information such as address and phone numbers. This information will print on your invoices.

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Step 2: Master Files → Users

- **Users**: I highly recommended you view this step-by-step video. Click on this link. http://www.teletracker.com/movies/Adding%20Users.htm

- Everyone that is going to be logging into TeleTracker has to be setup as a user. The User screen has 3 major sections that we will explain.

  - (1) General Information
  - (2) Location Restrictions
  - (3) Options

TeleTracker Quick Start Guide

Step 2: Master Files → Users (Continued)

General Information - Section 1:

Anything in Red in TeleTracker is Mandatory.

- **ID: This is Mandatory**. Create a login ID for this employee. Employees will need to type in their ID every time they log into TeleTracker. **It cannot have any spaces or special characters. Only numbers and/or letters or a combination of both.**
    - Examples for the most popular IDs' are.
        - First Name.
        - Last 4 digits of their social security number.
        - First initial and last name.
        - Last 4 digits of their phone number.

- **Name: This is Mandatory.** Type in the name of the employee**.** Yes, you can have spaces in the name field.

- **Password: This is Mandatory.** The Password can contain only numbers and letters with no spaces. A password is required every time you log into TeleTracker. You can change the password at anytime if your security level is a 99.
    - **Important Note.** Make sure your password is something you will remember. A few examples are:
        - First Name
        - Last 4 digits of the social.
        - Last 4 digits of phone number.

- **Security Level:** This controls what this user can and cannot do in TeleTracker. The higher the number the more a user can do. You will learn more about security in another section. Below are the security levels we recommend.
    - **99** ↔for Owners and others that need full access. This security level has no restrictions.
    - **80** ↔ for Managers.
   - **20** ↔ is for Salespeople.

Step 2: Master Files → Users (continued)

- **Salesperson Code:**
  - o If this user is going to be selling/creating invoices, they have to have a salesperson code attached to their user login so you can track their sales and commissions.
  - o You can add/create a new salesperson now by clicking on the magnifying glass. The magnifying glass icon 🔍 is used in TeleTracker to open another window.
  - o To add the new salesperson click on the New Icon on the top left corner of the window. After you click New this window will appear.
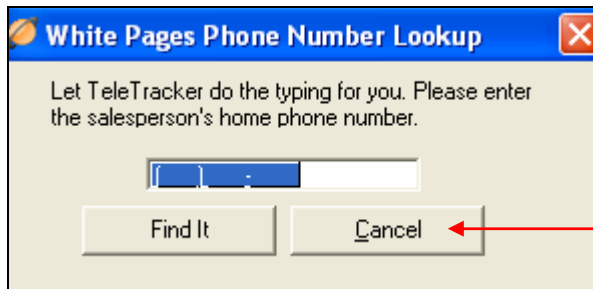
  - o
  - o You can click on the Cancel button and go to the next screen or
  - o You can enter the salespersons home phone number. If you enter the home phone number, it will search the white pages on the internet to see if it can find the salespersons full name and address.
  - o The Salesperson window will open.
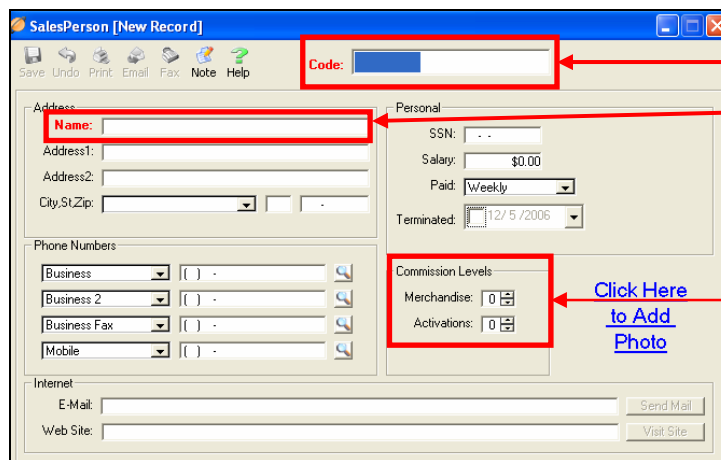
  - o
  - o Only two fields are Mandatory: Code and Name.
  - o Code: Examples for the most popular Codes are.
    - ▪ First Name.
    - ▪ First initial and last name.
  - o Name: This will appear on the invoice.
  - o Commission Levels: Change from 0 to 1 if you want TeleTracker to compute commissions on product sales and activations.

TeleTracker Quick Start Guide

Step 2: Master Files → Users (continued)

Location Restrictions – Section 2:

- **Home Location: This is Mandatory**.

  o You must assign a home location to every employee. It doesn't matter if you have 1 location or 50 locations, every person that logs into TeleTracker must be assigned a home location.

- **Allow login to**: This is a drop down box. This controls which store this employee can log into. When you click on the drop down box you will be presented with 6 options. **99.99% of our customers use the 3 options listed below.**

  o If you choose **Home location only** the employee will not be given the option to log into another store. They can only log into the store you selected in **Home Location**.

  o **Physical Location Only**: They can only log into TeleTracker if they are physically in the store that is listed in the Home Location.

  o **All Locations**: If you select this the employee has the option of selecting and logging into any store in your company.

    ▪ When this is necessary.

      • The employee works in various stores making sales and returns.

      • The employee needs to enter inventory/Purchase Orders for various stores.

- **Allow Inventory Checks**: Do you want this employee to be able to check the inventory in all your stores of just the home location you assigned to them.

- **Allow Reporting For**: Do you want this employee to be able to run reports for all your locations of just the home location you assigned to them.

- **Filter Transactions for**: Set this the same as Allow Reporting For.

Step 2: Master Files → Users (continued)

Options – Section 3: **None of these are Mandatory.**

- Force Clock-In at Login: This forces the employee to clock-in the first time they login to TeleTracker for the day.

- Hourly Employee: Just allows you to include or exclude hourly employees in the time clock report.

- Access Card Only: If you are using a swipe card to login.

- Biometric Only: If you want employees to use a fingerprint scanner to login. You must have biometric scanners or this will not function.

- Allow Time Clock: This allows your employee to clock in and out. If you using the Force Clock-In feature you must check this also. This allows the employee to clock out for lunch, clock back in, and clock out at the end of the day.

- Transfer Requests: If you want this employee to send an inventory request to another store.

Step 3: Master Files → Sales Tax → Items

- **Sales Tax → Sales Tax Items.**
    - o Open Sales Tax Items.
    - o In the Percentage Field type in your sales tax.

In this example the sales tax is 7%.

    - o
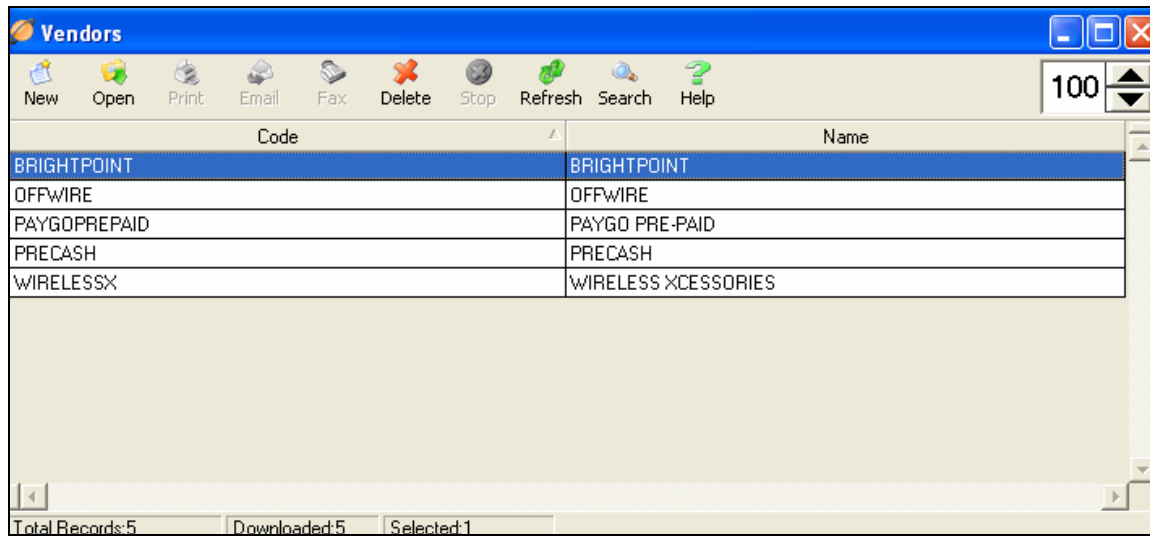
Step 4: Master Files → Vendors

- **Vendors**: Enter the vendors you order your products from.

Your basic TeleTracker Setup is now complete!

Here is a list of what needs to be completed:

(1) View > Preferences: If you added stores to your database.

(2) Service Provider Plans and Commissions.

(3) Products. Products can be imported into TeleTracker if you have them in an excel spreadsheet. Contact your salesperson for more information.

(4) Inventory. You cannot put in your inventory until you enter your products.

Call the TeleTracker training department to schedule training to help you complete these tasks and answer any questions you may have.

877-277-6810 ext 7

Recommended Training Schedules

Use this check list to track your progress through TeleTracker trainings.

Step 1

NOTES

#1: Basic Setup Training

☐ Master Files: New database setup.

      ☐ Locations

      ☐ Users and Salespersons

      ☐ Disclaimers

      ☐ Lead Sources

      ☐ Reasons

      ☐ Revenue Departments

      ☐ Coupons

      ☐ Sales Tax

      ☐ Vendors

      ☐ View > Preferences

Recommended Training Schedules

#2: Products and Inventory

☐ Products and Inventory Training

    ☐ Entering Products

    ☐ Entering Inventory

- Purchase Orders

- Inventory Adjustments

    ☐ Transfers (If Necessary)

    ☐ Inventory Reports

- Current Inventory

- Inventory Levels

- Inventory Values Summary & Detail

- Inventory Worksheet

- Inventory Reorder

- Inventory Aging

- Barcodes

Step 2

NOTES

Recommended Training Schedules

Step 3

NOTES

#3: Service Provider Training

☐ Service Providers

   ☐ Entering Commissions

   ☐ Entering Plans

   ☐ Entering Features

   ☐ Entering Spiffs

   ☐ Entering Rebates

   ☐ Service Provider Reports

   - Activation Commissions

   - Receivable Commissions

   - Activations Detail

   - Activations Summary

      o (Financial > Activities > Activations)

Recommended Training Schedules

Step 4

NOTES

#4: Salesperson Training

☐ Sales Training

    ☐ Sales

    ☐ Returns

    ☐ Exchanges

    ☐ Swaps

    ☐ Price Check

    ☐ Trace Through

    ☐ Reports

- Cash Drawer Reconciliation
- Salesperson Invoice Sales
- Salesperson Product Sales
- Daily Cash Sheet

Recommended Training Schedules

#5: Administration

☐ Security Levels

☐ Edit Time Clock Records

☐ Deactivations

☐ Marquee

☐ Management Reports

- Activations Summary & Detail
- Daily Cash Sheet
- Revenue Accrued
- Sales Tax Accrued
- Profit and Loss
- Deactivations
- Commissions

Customer Relationship Management

☐ Creating Tasks Automatically

☐ Creating Tasks Manually

   ☐ CRM Reports

      - Audit > Tasks

Step 5

NOTES