# BM
## businessmicros
### World Class Software Solutions for the Window & Door Industry

# BM Track - IT

## Retail Management Software

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Version 1.1

# Track - IT

Track - IT links exclusively to EvoSatellite providing up to the minute information on all aspects of quote management from any location.

## Order Book

Full order traceability:

- Frames Required/Ordered/Received

- Glass Required/Ordered/Received

- Panels Required/Ordered/Received

- Fitting Required/Scheduled

| MAIN MENU |
|---|
| ORDERS |
| SCHEDULES |
| CUSTOMER RELATIONS |
| CUSTOMER LIST |
| STAFF ADMINISTRATION |
| MANAGEMENT REPORTS |
| USER REPORTS |
| SETUP |
| EXIT |

| FRAMES RECEIVED | |
|---|---|
| QTY FRAMES | 2 |

| GLASS ORDERED | |
|---|---|
| DUE DATE | |

| NO MOULDED PANELS | |
|---|---|
| DUE DATE | |

| NOT INVOICED | |
|---|---|
| NUMBER | |
| DATE INVOICED | |
| VALUE (EXC) | £936.92 |
| TAX (17.50%) | £163.96 |
| VALUE (INC) | £1,100.88 |

| FITTING SCHEDULED | |
|---|---|
| DATE | 22/11/2013 |
| DELIVERY | Dallam Court |
| | Dallam Lane |
| | Warrington |
| | Cheshire |
| | WA2 7LT |

### APPOINTMENTS

| TYPE | DATE | TIME | NOTES |
|---|---|---|---|
| Fitting | 22/11/2013 | 10am | |

### STATUS

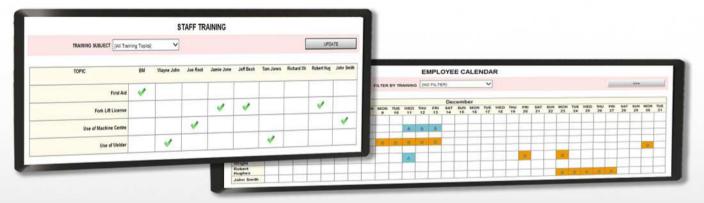| DATE | STATUS | STAFF | NOTES |
|---|---|---|---|
| 18/11/2013 | Order Checked | bm | |
| 18/11/2013 | Glass Ordered | bm | |
| 18/11/2013 | Frames Ordered | bm | Ordered With Supplier - Job 1234 |
| 18/11/2013 | Frames Received | bm | |
| 20/11/2013 | Fitting Scheduled | bm | 22/11/2013 - 10am |

## Scan your documents

Track-IT document imaging allows you to scan in paperwork and assign to :-

- Orders        • Quotes        • Leads
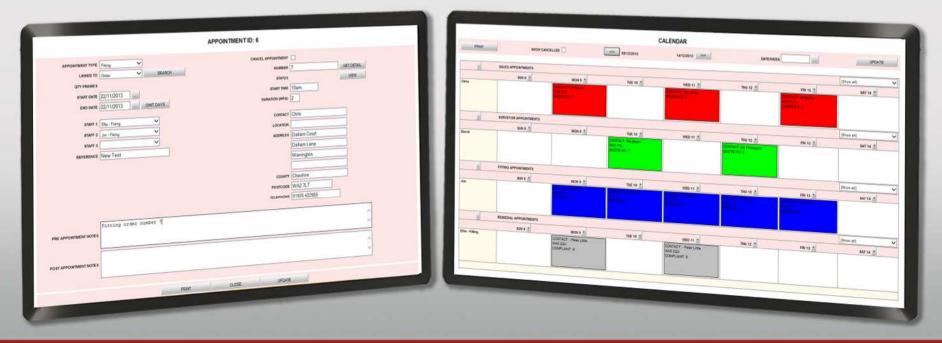
# Staff Administration

Staff administrator is a skills matrix identifying people available for different roles. Store records, holidays, absences and create options for training on a range of duties.



# Scheduling

Scheduling allows all staff members to be collectively organised under one calendar for ease of access, providing the facility for users to book appointments for Leads, Surveys, Fitting and Remedials.

# Customer Relations 📞

After sales can be logged from initial customer enquiry through to satisfactory closure.
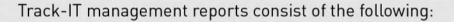
- Link query to the order.

- Book appointments.

- Track query status.

- Arrange replacement items.

- Record supplier faults.

Track-IT leads database records:
- How leads are generated  • Lead tracking  • Salesman Report
- Order values  • Performance figures  • Analysis by area or post code.

# Management Reports 📋

Track-IT management reports consist of the following:

| | | |
|---|---|---|
| • Cumulative Day Order Book | • Lead Analysis | • Processor Analysis |
| • Weekly/Monthly Customer Sales | • Profitability Analysis | • Order Value Analysis |
| • Complaints Cost Summary | • Complaint List | • Training Matrix |

Customised management reports are available subject to specification and are priced on application.

## EvoSatellite PC Specification

| | |
|---|---|
| Processor: | 2.4GHz (Dual/Quad Core) |
| Memory: | 4GB of Ram |
| Hard Drive: | 80GB Hard Drive |
| Operating System: | Microsoft Windows Vista / Windows 7/8/10 |
| Drive: | Disk Drive |
| Network: | Gigabit Network Card |

**All PCs/workstations must have the same operating system.**

## Disaster Recovery

It is vital that you take all necessary precautions to allow your business to continue to function in the event of a critical hardware failure. Your hardware supplier/support provider should be able to draw up a suitable disaster recovery plan for your business and we advise that offsite backups are taken in addition to any onsite backups in case of fire, flood or theft. You should aim to provide yourself with the ability to reconstruct your entire system on new hardware with minimal disruption to your business.

**It is vital that you arrange for your systems be protected with a reputable anti-virus solution**

*businessmicros*
*Hardware Specification*

## EvoSatellite/ Track-IT Server Specification

| | |
|---|---|
| Processor : | Intel Xeon multi-core processor (Minimum 2.4GHz) |
| Memory : | 16GB |
| Hard Drive : | 500Gb configured for RAID 5 |
| Operating System : | Microsoft Windows Server 2008/2012/2016 Standard Edition |

**Notes :**

1. If using Microsoft Terminal Services to centralise deployment and improve performance then additional memory may be required depending upon the quantity of simultaneous users. There are also additional licensing considerations where Microsoft Remote Desktop CALs will need to be purchased for each user.

2. Microsoft Small Business Server may be adequate in some circumstances. Please consult us prior to purchase.

3. For optimal performance gigabit networking should be employed not only in each network card but with suitable cabling and switches throughout your network

4. We do not recommend the use of off-site servers for a production environment

5. We do not recommend the use of NAS drives

**Each user's requirements differ so we would welcome the opportunity to review any proposed hardware specifications prior to purchase to evaluate their suitability.**

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