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Chapter 1: Getting Started with PermaTrak™

I. Overview of PermaTrak™
PermaTrak™ is a web-based software application that allows distributors to order, track, and manage permanent POS such as neon signs, coolers, racks, and other non-temporary or asset type signage and items. PermaTrak™ records all data associated with ordering, stocking, placing and maintaining permanent POS. PermaTrak™ is used alone or with its sister application for semi-permanent and temporary POS SIGNTRAK®. PermaTrak™ provides key indicators to track consumer trends, employee productivity, customer behavior, cash management for POS, and to create accurate POS activity reports for suppliers.

   A. Accessing PermaTrak™
PermaTrak™ is organized into dashboards and pages. Dashboards display pages targeted to a specific group of users:
   • Sales reps order POS and manage timely distribution to customer accounts.
   • Asset managers receive POS orders and maintain order status for the sales reps.
   • Managers track activity and budgets and create reports.
   • Administrators configure and maintain PermaTrak™.

   🚫 Depending on your organization’s options, you may be able to access one or more dashboards and applications.

To access PermaTrak™, your Administrator must first add you as a user. Authorized users are each assigned a username and password. Passwords must be at least five characters in length, may contain any combination of letters, numbers, or symbols. To change a password, see your Administrator.

   B. Signing in to PermaTrak™
To access PermaTrak™, log-on to your unique SIGNTRAK® website URL using your user ID and password.

Use a Windows Internet Explorer browser (IE6, IE7 or IE8) running on a Windows enabled computer.

   🚫 For ease of use, bookmark your unique SIGNTRAK® URL in your browser.

To use the Sign In screen:
On the login screen (Figure 1-1), type your user ID and password. Click Sign In or press Enter. If you click the “Remember me” box SIGNTRAK® will remember your user ID and password.
The default page for all users is the Bulletin Board (Figure 1-2).

**C. Accessing the PermaTrak™ Main Menu**

PermaTrak™ is accessed from the User Menu located to the left of the Bulletin Board view (Figure 1-2).

**D. SIGNTRAK®/PermaTrak™ Security**

SIGNTRAK®/PermaTrak™ is a secure server environment. SIGNTRAK®/PermaTrak™ uses the same Internet security protocols used for Web-based credit card transactions (https). Your secure website address is unique, it is not shared.
E. Adjusting the SIGNTRAK®/PermaTrak™ time out feature
The period of time before the web application times out is set at the time of installation by SignTrak support. To adjust the time out feature, contact Technical Support or log a request on the Support tab of the SignTrak website http://www.trackmysigns.com.

II. Performing Common Tasks in PermaTrak™
This section provides general guidelines to perform common tasks in PermaTrak™. Detailed guidelines can be found throughout this Guide.

A. Navigating and entering data
Navigate and enter data in PermaTrak™ in the same way you would enter information on any web page.

1. General layout of menus, buttons and data entry fields
- The Main Menu navigation is located on the left side of the page.
- User Menu navigation is determined by type of User.
- POS Order navigation buttons are located on the right side of the page.
- Use the Main Menu or click the Exit button to return to the main menu.

💡 Using the Back button in PermaTrak™ may cause a slow browser response or return an error. Improperly using the back button during order input can result in lost data.

- Exit: returns the user to the previous view and any entered data is not saved.
- Save: saves data entered and returns to the same view as when using Exit.
- Refresh: clears data that has been entered and returns the user to the previous screen.
- Print: prints a copy of the order to a connected printer.

B. Printing from PermaTrak™
PermaTrak™ POS orders are printer-friendly versions that do not contain any extraneous links or other hypertext items. You can print using HTML or Adobe PDF (Portable Document Format). Adobe Reader 6.0 or later is required to print using Adobe PDF.

C. Working with inquiries and reports
Inquiries are first displayed on screen for viewing. The user then has the option to Print (on a locally attached printer) or Export the data to Excel for further formatting and manipulation of the data.

D. Entering Data
There are two ways to enter data.
- Drop down menus allow you to choose from a list of values or attributes. To see the list, place the pointer on the down arrow positioned on the right side of the drop down box.
- Text fields and message windows allow you to enter text using your computer’s keyboard.

E. Entering Dates
To enter a date, choose a date from the calendar that opens, or manually enter a date.
- To use the calendar format, click a year, month and day.
  - To change the calendar month, click the single arrows.
  - To change the calendar year, click the double arrows.
- To manually enter a date, edit the current date or type in a new date use the same format that appears in the date box (e.g. 01/15/2008, not 1/15/08). Invalid date formats will return an error message.
F. Using the Bulletin Board Page
The Bulletin Board page contains news, announcements and information about your company. Navigate the bulletin board like you would any web page. To submit ideas or information for the Bulletin Board, contact your manager or PermaTrak™ administrator.

G. Editing Items (Sign Attributes) and Configurable Data Tables
Administrators can maintain and edit the underlying data used by PermaTrak™. Users without Administrator credentials are denied access to ensure consistent accurate data.

💡 Report incorrect or inaccurate permanent POS item descriptions to the PermaTrak™ administrator.

H.Exiting from PermaTrak™
Do not close the browser window to exit from PermaTrak™. Incomplete data input will not be saved.

To exit from PermaTrak™:
- From within any function screen, click Exit or CLOSE to return to the PermaTrak™ User Menu then click Logout located under Other Options.
- From the Main Menu, click Logout.

To exit from PermaTrak™ and return to the SIGNTRAK® Bulletin Board:
- From within any function screen, click Exit or CLOSE to return to the PermaTrak™ User Menu then click Return to Bulletin Board located under Other Options.
- From the PermaTrak™ Main Menu, click Return to Bulletin Board located under Other Options.
Chapter 2. Getting Started with PermaTrak™

When you access PermaTrak™ from the main menu, the Pending Orders view is displayed (Figure 2-1).

1. Initial Data Setup

Initial data setup must be in the following sequence to ensure accurate results:

1. Configurable Fields are primarily tables used to create drop-down boxes.
   a. Class of Signs
   b. Sign Types
   c. The other tables in Configurable Fields can be addressed later, but before you start entering orders for signs:
      i. Reason Codes for Cancelling orders
      ii. Reason Codes for Suspending Orders
      iii. Price Markup Percentage
      iv. Competitive Brands – for tracking competitive signs at customers
      v. Complete Order Text
      vi. Work Order Disclosure Statement

2. Items – master record for each specific sign carried in your inventory or at a customer location

3. Inventory – a record for each individual sign to be tracked by serial number and location

Other data used by PermaTrak™ includes Customer and Brand information. These databases are maintained from the SIGNTRAK® database and accessed by PermaTrak™. Customer and Brand/Package
data is normally extracted nightly from your back office route accounting system and transmitted to your SIGNTRAK® servers. New customer, item or brand data is normally available the day following any route accounting system update.

To access Configurable Fields, click the Configurable Fields menu option. A list of configurable field tables and their current data elements is displayed to the right of the menu (Figure 2-2).

![Figure 2-2 – Configurable Fields tables]

### A. Configurable Fields – Class of Sign
To access the Class of Sign table, click Class of Sign from the tables list. The Class of Signs table maintenance view is displayed to allow add/change/delete functions against the table (Figure 2-3).

The Class of Sign field is used for the following purposes:
- As an optional method of filtering the list of signs available in the warehouse for installation in a customer location when entering an order for a sign
- As a primary or secondary sort field in the various inquiries/reports to sequence and groups signs by class:
  - Inventory by Item & Status
  - Inventory Allocations by Item

To add an entry to the Class of Signs list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen.

To delete an entry, click Delete on your keyboard. **Do not leave blank lines in the list.**

To save changes, click Save. To exit without saving the changes, click Close.
B. Configurable Fields – Sign Types

To access the Sign Types table, click the **Sign Types** link in the list of tables. The Sign Types table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-4).

The Class of Sign field is used for the following purposes:

- As an optional method of filtering the list of signs available in the warehouse for installation in a customer location when entering an order for a sign
- As a primary or secondary sort field in the various inquiries/reports to sequence and groups signs by class:
  - Inventory by Item & Status
  - Inventory Allocations by Item
  - POS Ratio Inquiry

To add an entry to the Class of Signs list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen. To delete an entry you can delete it in any of the same ways you would do it in a word processor. However, do NOT leave a blank line in the list.

When finished making changes to the table, click **Save** to save the changes else click **Close** to exit without saving the changes.
C. Configurable Fields – Reason Codes for Cancelling Orders

To access the Reason Codes for Cancelling Orders table, click the **Reason Codes for Cancelling Orders** link in the list of tables. The Reason Codes for Cancelling Orders table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-5).

When cancelling an order, you are required to select a reason for cancellation from the drop-down box.

To add an entry to the list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen. To delete an entry, click Delete on your keyboard. Do not leave a blank line in the list.

When you are finished making changes to the table, click **Save** or choose **Close** to exit without saving the changes.

![Figure 2-5 – Reason Codes for Cancellation details](image)

D. Configurable Fields – Reason Codes for Suspending Orders

To access the Reason Codes for Suspending Orders table, click the **Reason Codes for Suspending Orders** link in the list of tables. The Reason Codes for Suspending Orders table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-6).

*Suspended orders require a reason for suspension from the drop-down menu.*

To add an entry to the list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen. To delete an entry, click Delete on your keyboard. Do not leave a blank line in the list.

When finished making changes to the table, click **Save** to save the changes or click **Close** to exit without saving the changes.
E. Configurable Fields – Price Markup Percentage

To access the Price Markup Percentage table, click the Price Markup Percentage link in the list of tables. The Price Markup Percentage table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-7).

The Items master table in PermaTrak™ contains both cost and retail price fields for each type of sign. When creating a new sign entry in the Items table, or changing the cost for a particular sign type, the Item maintenance function uses the single percentage entry in this table to calculate a retail price based upon applying the specified markup percentage to the cost price. The user is allowed to then override the retail price if needed. The two prices allow reps to indicate to customers if they wish the value of the sign being placed and for PermaTrak™ to report placements at cost.

Note: Only ONE record should exist in this table. Do NOT leave a blank line in the list.
To make both the cost and retail price the same price, place 0 in the record.

When finished making changes to the table, click Save to save the changes or click Close to exit without saving the changes.
F. Configurable Fields – Competitive Brands
PermaTrak™ allow you to capture and report on competitive signage in customer locations. When a competitive sign placement is entered, the system requires you to select the competing brand from a drop-down list. This table allows for the definition of competitive brands.

To access the Competitive Brands table, click the Competitive Brands link in the list of tables. The Competitive Brands table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-8).

To add an entry to the list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen. To delete an entry, click Delete on your keyboard. Do not leave a blank line in the list.

When finished making changes to the table, click Save to save the changes or click Close to exit without saving the changes.

![Figure 2-8 – Competitive Brands details](image)

G. Configurable Fields – Complete Order Text
The Complete Order Text record is not used in the existing version of PermaTrak™. This record will be included in future enhancement. When the new version upgrade is available, a text field will enable the user to add order delivery documentation to an order.

To access the Complete Order Text table, click the Complete Order Text link in the list of tables. The Complete Order Text table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-9).

To add an entry to the list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen. To delete an entry, click Delete on your keyboard. Do not leave a blank line in the list.

When finished making changes to the table, click Save to save the changes or click Close to exit without saving the changes.
H. Configurable Fields – Work Order Disclosure Text

PermaTrak™ can be configured to print a work order for placement of signs. This disclosure statement is printed on the work order.

To access the Work Order Disclosure Text table, click the Work Order Disclosure Text link in the list of tables. The Work Order Disclosure Text table maintenance view is now displayed to allow add/change/delete functions against the table (Figure 2-10).

To add an entry to the list, add the record at the end of the list. The records within the list will be displayed in an alphabetical sequence whenever you first enter the maintenance screen. To delete an entry, click Delete on your keyboard. Do not leave a blank line in the list.

When finished making changes to the table, click Save to save the changes or click Close to exit without saving the changes.

I. Setting Up Items/Item Maintenance

The Items master table defines each sign type to the system. If you currently have the inventory of permanent signs stored electronically, SignTrak may load this table for you at the time of installation. Otherwise, enter the records manually.

To access the Items Maintenance function, click on the Items link from the PermaTrak™ main menu. A list of all item records is displayed as depicted in Figure 2-12 below. From this screen you can perform any of the following tasks:
- Change the Primary or Secondary sort field selection to re-sequence the list as desired. The available sort fields for the Primary and Secondary sorts are shown in Figure 2-11. To change a sort selection, click on the drop-down box for either Primary or Secondary sort and select the desired sort field. You should always select the Primary sort field before selecting a Secondary sort field. After making a sort selection, the display shows the new sequence.

![Figure 2-11 – Primary & Secondary Sort selections](image)

- Receive inventory into stock. This function is covered later in the Receiving Signs into Stock topic and is triggered by clicking a Receive Inventory link in the Action column of the Items List (Figure 2-12).

- Add/Change or Delete an item. To change or delete an item, click on the underlined Item description. The Item details view for the selected item is then displayed for editing, as shown in Figure 2-13. To add an item, click on the New Item button. An empty Item details view is then displayed for entry of the items data, as shown in Figure 2-14.
An important set of fields in the Items table is the description of each sign type. This field is used by the sales rep when entering an a sign order for installation at a customer location. See Figure 2-13 for an example of a thumbnail image of a sign being ordered. If thumbnails are not available an image will not display.

Sign images are important as visual confirmation that the sign chosen is correct. To create sign image thumbnails, capture a digital photo of a sign and save as a 72 dpi JPG thumbnail sized 200 x 200 pixels or smaller. Figure 2-14 shows the Browse and Add Image buttons used to upload images.

IMPORTANT: In the absence of thumbnails, the Item Description is even more important. Keep in mind that the Item Description along with Sign Type, Sign Class and Brand must adequately describe each sign to ensure 100% accuracy in the sign ordering process.

The entry for “Scrubbable Piece?” controls whether a sign is to be included on the Scrub Brush Hot List.

The Status box on the lower left of the screen shows the number signs with these exact item descriptions that are available for customer installations.

The buttons at the bottom of the screen perform the following functions:

- **Save & Close**: saves changes to this record and returns back to the Items List view.
- **Save & Add Qty**: saves changes to this record and calls the Inventory Receipt function to allow entering a receipt for this item.
- **Close**: Closes this view without saving any changes and returns to the Items List view.
- **Delete**: Deletes this record and returns to the Items List view.
- **Receive Inv**: calls the Inventory Receipt function, to allow entering a receipt for his item, without saving any changes to this item.
II. Loading Beginning Inventory and Entering Daily Receipts

Loading inventory is used to record new signs and other permanent POS into inventory. It is also the final set-up step during PermaTrak™ installation.

In the initial set-up process, SignTrak support will load your electronically provided inventory. Otherwise, it is loaded manually using the Inventory Receipt entry function.

The Inventory Receipt function can be accessed in several ways:

- From the Items List view by clicking on the Receive Inventory link in the Action column for the item to be received.
- By clicking the Save & Add Qty button while entering a new Item.
- By clicking the Save & Add Qty or Receive Inv buttons when viewing or changing the details for an item.

Figure 2-14 below depicts the view for entering a receipt for an item. Enter the quantity of the sign being received, select the branch of record for that item, then click the Confirm Receipt button. The page returns to Inventory Receipts view.
Chapter 3. The PermaTrak™ Order Process

Sales representatives use PermaTrak™ to request new POS and stay informed about their POS order status for customers or territory. Sales reps view the bulletin board for POS-related news and announcements.

I. Off-Line Services (STOLS)
Sales reps with mobile PCs can install the optional Off-Line Services. With SIGNTRAK® Off-Line Services (STOLS), users can use their mobile PC to order POS without being connected to the Internet. Orders are automatically submitted when next connected. SIGNTRAK® and PermaTrak™ are fully functional off-line. All administrator updates appear and e-mail communication is delivered and received when the mobile device is next connected to the Internet.

**Note:** A mobile Windows PC with Internet Explorer 6.0 or higher is required for off-line services.

💡 See guidelines for Using Offline Services in Chapter 3, of the SIGNTRAK® User Guide.

II. Performing common tasks in PermaTrak™
This section explains how to perform common tasks in PermaTrak™ as a sales representative. It covers the following topics:

- Entering a new POS order
- Viewing and sorting your POS orders
- Printing orders or pending order activity
- Using off-line services
- Communicating with the sign shop

A. To access PermaTrak™ as a sales rep:

- Type your company’s SIGNTRAK® URL into the address field on your browser.

![Figure 3-1 – Accessing SIGNTRAK®/PermaTrak™ – Go to Log-in screen](image)

- The login screen appears (Figure 3-2)
Figure 3-2 – Sign-in screen

- Type your user ID and password.
- Click **Sign In** or press **Enter**. The Bulletin Board and main user menu is now displayed (Figure 3-3).

Figure 3-3 – SIGNTRAK® Main Menu with Bulletin Board

- Click **PERMATRAK™** in the main menu to go to the PermaTrak™ menu (shown in Figure 3-4).
B. Viewing the Bulletin Board

The online Bulletin Board (Figure 3-3) is the default jump page for all SIGNTRAK® and PermaTrak™ users. Company news, announcements and POS information can be posted. Check the bulletin board on every Sign In for recent updates.

💡 See Using the Bulletin Board in Chapter 2 of the SIGNTRAK® User Manual for information about submitting news and ideas for the bulletin board.

C. Using the POS Order Form

Ordering POS in PermaTrak™ is as easy as using a typical Web store. Advantages include:

- Faster than using paper forms
- Eliminates errors or misinterpretation of information
- No more lost or incomplete orders
- Order status is viewable on demand 24/7
- Provides cradle to grave tracking of permanent signs

1. Entering a New Order

The process to enter a new sign order is quick and simple:

1. From the PermaTrak™ menu, click Request New Sign. The POS Order Form is displayed with the Order Status as ‘New’ and your name appears as a Front Line Salesperson (Figure 3-5).
2. Choose a Customer Number from the drop down menu (Figure 3-6). Customer names will appear in alphabetical order. The same customer database is used for both PermaTrak™ and SIGNTRAK® applications.

3. A separate order is required for each customer and can contain multiple signs.

4. The Request Completion By date defaults to 6 calendar days into the future. To override and change the date either:
   a. Enter or edit the date displayed, using a mm/dd/yyyy format, or
   b. Click on the Calendar icon next to the date entry field and select the date from the pop-up window displayed (Figure 3-7).
5. To send a message to the sign shop, type in the Message window (Figure 3-8).

6. Click the **Get Sign(s)** button to the right of the message entry field to select the sign to be ordered. A pop-up window displays for sign selection (Figure 3-9).

7. A single sign criteria, or both criteria (Figures 3-10 & 3-11) may be used to filter the list of available signs for selection. When the first criteria selection is made, the system will build and display the request. Depending on the size of the selection and Internet speed, this may take a few minutes. You may then make a selection from the other criteria drop-down or proceed with selecting one or more signs from the resultant list of signs (Figure 3-12).
8. Sign Selection (Figure 3-12) allows one or more signs to be ordered at the same time. To order a sign enter the quantity in the entry box.

9. After entering quantity, click **Save & Close** to add the sign(s) to the order.
10. When the POS Order Form is redisplayed with the sign(s) selected, text may be entered into the **Install Location** field as installation instructions, as shown in Figure 3-14.

![POS Order Form](image)

**Figure 3-14 – Items on order with installation notes**

11. To delete a sign entered on an order, click the **X Delete** link for the sign.
12. To add another sign to the order, click **Get Sign(s)** again.
13. To submit the finished order, click **Submit Order**. The order is saved and the user is returned to the main PermaTrak™ menu.

**2. Actions Against an Order**

An order can be amended anytime before it is completed or cancelled.

1. To access an existing order, use or go to Pending Orders (Figure 3-15).

![Pending Orders](image)

**Figure 3-15 – Pending Orders view**
2. Click on the order number for the order to be accessed. The order details are then displayed, Figure 3-16.

Figure 3-16 – Order details

3. From the Order details, the following actions can be taken:
   a. Amend the order by adding or editing the message text. Be sure to click the Save button to save changes.
   b. Adding or editing the Location text. Be sure to click the Save button to save changes.
   c. Deleting a sign from the order by clicking the X Delete link. The order is automatically updated and saved on deletion.
   d. Print the order by clicking the Print button.
   e. Suspend the order for further review by doing the following:
      i. Select a Reason for Suspending the order from the drop-down box at the top of the view, Figure 3-17.

   Figure 3-17 – Suspending an order

   ii. After selecting a reason, click the Suspend button next to the Reason code box.
   iii. Note: Suspending an order updates the order’s status to ‘Suspended’ without having to click the Save button.
   f. Cancel the order by doing the following:
      i. Select a Reason Code for Cancellation from the drop-down box, upper right side of view (Figure 3-18).
ii. Click the **Cancel** button to then cancel the order. The Pending view is then displayed, without the cancelled order being included.

iii. **Note:** Cancelling an order updates the order’s status to ‘Cancelled’ without having to click the **Save** button.

**g.** To exit the order view without saving changes, click **Exit**.

**3. Completing an Order**

Completing an order consists of assigning a specific serial number of the ordered sign(s) to the order and clicking a **Complete Order** button. Thus, there must be available inventory for an ordered sign to complete the order.

Orders are completed from the **Pending Orders** view. To complete an order:

1. In the Pending Orders view, click on the Order Number to be completed. The order details are displayed,(Figure 3-19).

2. As shown in the order details (Figure 3-19), when the details are built for display, the system assigns the lowest serial number in stock for each sign on the order. You can either accept each assigned serial number of override each sign’s assigned serial number to any other serial number in stock by clicking the serial number drop-down box for the sign and selecting another number, as shown in Figure 3-20.
3. After ensuring that the correct serial numbers are assigned to the order, to complete the order, click **Complete Order**. The order status is updated to completed and the selected sign serial numbers are updated to **Installed** at the customer on the order.

4. The display returns to the Pending Orders view after performing the updates for the completed order. The order now appears in the **Complete Orders** view.
Chapter 4. Inventory Management

I. Entering Inventory Receipts
When new signs are received at the warehouse an Inventory Receipt must be entered into PermaTrak™ to enable inventory tracking. The Inventory Receipt function can be accessed in several ways:

- From the Items view by clicking on Items in the Maintenance sub-menu and then clicking on the Receive Inventory link in the Action column for the item to be received.
- By clicking the Save & Add Qty button while entering a new Item while in the Items view.
- By clicking the Save & Add Qty or Receive Inv buttons when viewing or changing the details for an item while maintaining an item from the Items view.

Figure 4-1 below depicts the form for entering a receipt for an item. The user only enters the quantity of the sign being received, selects the branch involved and then clicks the Confirm Receipt button to process the entry. The view is then returned to the Inventory Receipts List view.

![Inventory Receipt form](image)

Figure 4-1 – Inventory Receipt view

II. Create Inventory Activities
Inventory activities are transactions that can affect inventory balances and also change the status of inventory items. Inventory activities supported by the system and their affect on inventory status of a serialized item are:

1. **Clean**: Records act of cleaning a sign. The sign is still in the same status (Installed or Awaiting Installation). An Inventory Activity record is written to Activity Transaction file.
2. **Install**: The sign is transferred from Awaiting Installation status in the warehouse to the customer on the transaction record with a status of Installed. This is a way to install a sign without using an order. An Inventory Activity record is written to the Activity Transaction file.
3. **Remove**: The sign is transferred from the customer site back to the warehouse, with a status of Awaiting Installation. An Inventory Activity record is written to the Activity Transaction file.
4. **Repair**: The sign’s status is changed to In Repair and is left at its current site.
5. **Repair Complete**: This activity changes the status of a sign from status In Repair to Repair Complete and is left at its present site.
6. **Transfer**: This activity moves the sign from its current location and Branch to another location and/or Branch.
7. **Write-Off:** Removes sign from its last recorded location and sets its status to *Written Off*.

To Create an Activity, click **Create Inv Activity** link in Maintenance sub-menu. The Create Inventory Activity view in Figure 4-2 is displayed, enabling the user to filter the listed inventory items to either those items *Not Installed* or to those signs at a specific *Customer site*. Figure 4-3 shows the drop-down list for selecting a location. The default location when the screen is first displayed is *Not Installed*.

![Create Inventory Activity Sign Selection screen](image)

**Figure 4-2** Create an Inventory Activity Sign Selection screen

Figure 4-4 shows some of the signs installed at 17th Street Market. Also shown in Figure 4-4 is the selection of a sign for which to create an activity by clicking on the check box to the left of the desired sign. After selecting the sign or signs (more than one sign can be selected for the SAME activity creation), click **Create Activity**. The system will then display the Inventory Activity Input form (Figure 4-5).

See Figure 4-4 to **Print Barcodes** for one or more selected signs using Create Inventory Activity.
### Figure 4-3  Selecting an Install Location (Not Installed signs are in inventory)

**Create Inventory Activity**

<table>
<thead>
<tr>
<th>Select</th>
<th>Description</th>
<th>Item #</th>
<th>Class</th>
<th>Type</th>
<th>Brand</th>
<th>Branch</th>
<th>Customer</th>
<th>Ser #</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logo Backlit Sign</td>
<td>1027480</td>
<td>Beer</td>
<td>Backlit</td>
<td>BUD</td>
<td>17TH STREET MARKET (15045)</td>
<td>1001201</td>
<td>Installed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logo Backlit Sign</td>
<td>1027480</td>
<td>Beer</td>
<td>Backlit</td>
<td>BUD</td>
<td>17TH STREET MARKET (15045)</td>
<td>1001201</td>
<td>Installed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Logo Backlit Sign</td>
<td>1027480</td>
<td>Beer</td>
<td>Backlit</td>
<td>BUD</td>
<td>17TH STREET MARKET (15045)</td>
<td>1001201</td>
<td>Installed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Figure 4-4  Selecting a Sign

**Create Inventory Activity**

<table>
<thead>
<tr>
<th>Select</th>
<th>Description</th>
<th>Item #</th>
<th>Class</th>
<th>Type</th>
<th>Brand</th>
<th>Branch</th>
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<td></td>
<td></td>
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<tr>
<td>Logo Backlit Sign</td>
<td>1027480</td>
<td>Beer</td>
<td>Backlit</td>
<td>BUD</td>
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<td>1001201</td>
<td>Installed</td>
<td></td>
<td></td>
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<td>1027480</td>
<td>Beer</td>
<td>Backlit</td>
<td>BUD</td>
<td>17TH STREET MARKET (15045)</td>
<td>1001201</td>
<td>Installed</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Figure 4-5  Inventory Activity Input Form
To create the activity for the sign(s) listed in the yellow highlighted section, select the type of activity from the Activity drop-down list (Figure 4-6). Note that some activities may also require the selection of a Branch from a Branch drop-down list, as shown in Figure 4-10.

In addition to changing the status of a sign, activities also generate transaction records in an Activity file. Figure 4-7 shows the activity record, as shown in the Activity inquiry (Maintenance sub-menu, link Inventory Activity) for the Remove activity represented in Figure 4-6.

Within the Inventory Activity inquiry function (Figure 4-7), clicking on a Tracking Number causes the details for the selected activity to display as shown in Figure 4-8.

Figure 4-9 shows the status (back in the warehouse) of the sign in Figure 4-5 through 4-8 after being removed from the customer site.
III. Competitor Tracking

Competitor Tracking records the latest count for a customer/brand. Future functionality will enable selection of an existing count of a brand and updates when counts change.

To access this function, click the Competitor Tracking link in the Maintenance sub-menu.

The screen shown in Figure 4-11 is displayed all existing records in the Competitive Brands Inventory.

To add data to this database, click the Update Data button. The Competitor Tracking entry form is displayed (Figure 4-12). The form contains the following entry fields:
- Customer drop-down for selecting the customer being reported.
- Competitive Brand drop-down for selecting the brand. Competitive brands are contained within a Configurable Fields table.

If a desired brand is not in the drop-down list, contact your PermaTrak™ administrator and ask them to add the brand to the Competitive Brands list.

- Sign Type drop-down box to identify the sign by your Sign Types for reporting purposes.
- Quantity of the Brand/Sign Type counted.

Figure 4-12 Competitor Tracking input form

After entry of required data, click Update Data. To exit without saving the data, click Close. The system then returns to the previous screen (Competitor Tracking list).
Chapter 5. Inquiries & Reports

Most inquiries/reports are accessed from the Inquiries sub-menu (Figure 5-1). Inventory Receipts and Inventory Activity inquiries are found in the Maintenance menu.

![PermaTrak™ main menu](image)

I. Inventory Receipts Inquiry

This inquiry shows all inventory receipts in descending sequence by date and time. The latest receipts are listed first. Each item’s description field is a link which displays the details for the selected receipt transaction (Figure 5-3).
II. Inventory Activities Inquiry

Inventory activities are transactions which affect the status, and in some instances, the location for a sign. This inquiry lists all Inventory Activity transactions in descending order by Tracking Number (transaction number) with date and time. Inventory Activities consist of the following types of transactions for a sign:

- Clean
- Install
- Remove
- Repair
- Repair complete
- Transfer
- Write-off

Figure 5-4 shows the inquiry results. Click the Tracking Number to display details for a specific activity (Figure 5-5).
Figure 5-4  Inventory Activities list (in descending order by tracking number, date/time)

III. Inventory By Item And Status
This inquiry provides a means to ‘slice and dice’ the inventory data in various ways by using one or more of the selection drop-down boxes (Figure 5-6) to filter results.

Figure 5-5  Inventory Activity details

Figure 5-6  Inventory by Item and Status Selection fields
Figure 5-7 shows the drop-down box for Status with *Installed* being selected. This results in a full listing of all installed signs for all customers. Further selections can be made if needed.

![Inventory by Item and Status](image)

Figure 5-7 Inventory by Item and Status results display

The results of the inquiry are viewed or printed. To print, click **Print** or **Export** to Excel.

**IV. Inventory Allocation by Item**

This inquiry lists all installed and awaiting installation signs for a selected sign type. Figure 5-8 shows the drop-down list for all sign types. Figure 5-9 shows the results for an Arizona Cardinals Stadium Mirror. The inquiry displays a complete list of all specific sign type locations.

![Inventory Allocation by Item](image)

Figure 5-8 Inventory Allocation by Item drop-down list
V. POS By Customer Inquiry

This inquiry is used to review Inventory Activities transaction records. Figure 5-10 shows available filter selections. Inquires can be flexible, for instance, report all installs for a date range as shown in Figure 5-11.

Figure 5-10 POS by Customer selection fields

Figure 5-11 POS by Customer inquiry results – Installs for period of 7/01/09 to 7/06/09
VI. POS Ratio Inquiry
This inquiry is for PermaTrak™ users who want to track competitive permanent sign placements in customer locations. It matches the company’s sign placements with those of competitors and reports the number of each and the percentage of each to the total signs by type of sign.

Figure 5-12 shows such an inquiry for customer 4-Star Liquors.

![POS Ratio Inquiry](image)

Figure 5-12 POS Ratio results for a customer

VII. Scrub Brush Hot List
This inquiry helps maintain signs in the trade and report competitive sign placements through the use of multiple filters.

![Scrub Brush Hot List](image)

Figure 5-13 Selecting a customer sign for creating an Inventory Activity
This function acts as a report and also can be used to create activities to record actions for signs. Use this inquiry to create a turn-around document that records field activities or as a competitive tracking checklist (lower portion of Figure 5-13).

Activities are created by clicking on one or more check boxes in the left-hand column (Figure 5-13) and then clicking Create Activity. The Inventory Activity input form is displayed (Figure 5-14).

![Inventory Activity form](image)

Figure 5-14 Inventory Activity creation from Scrub Brush Hot List
Chapter 6. System Parameters

System parameters are used to turn on and off functionality within an application and sometimes to provide default or specific installation data values to effectively customize the application without changing program code.

Note: The current version of PermaTrak™ provides a single system parameter. Additional parameters will be included in future versions.

![System Parameters](image)

Figure 6-1 PermaTrak™ System Parameters

The **Barcode Print Option** is provided to enable the printing of barcode labels at the time of sign receipt. Barcode labels are attached to signs before installation. Labeling requires a small barcode label printer. Barcode labels include an inventory serial number for a specific sign.