

Welcome to...

Excelisys Business Tracker

3.1go!

Read Me Doc for v3.1go (5/2/12)

Introduction

This is a proof-of-concept demonstration of a typical conversion/modification of an existing solution, in this case the Excelisys Business Tracker 3.0, and integrating an interface compatible with iOS, specifically using FileMakerGo on the iPad. This is not intended as a complete, working solution although it is mostly functional. We provide it merely to show an example of how an interface designed for desktop can be adapted to the iPad platform.

Some of the FMgo-exclusive functionality includes a "Delivery Schedule" and "Daily Activities" which serve as examples of task-oriented processes that are provided for in the iOS interface. For example, when delivering an order, you can lookup the address on a map, take pictures of the delivered goods to prove their good condition, and capture the signature of the receiving party. These are just a few examples of the unique capabilities FMgo offers.

About the eXBT 3.0

Excelisys Business Tracker 3.0 (eXBT) is a fully functional business tracking system showcasing some of the many new features introduced in the last several versions since FileMaker Pro 7 was released, up to and including FileMaker Pro 11*. The system can be shared over a network serving multiple users, each logging in with a secure account. It tracks companies and contacts, with multiple locations and phone numbers. It stores an inventory of products and provides an easy method for creating and tracking sales, printing and emailing invoices, plus sales reports and mailing lists. The demonstration data can be cleared out, and you can start putting eXBT to use running a small retail or wholesale business. It is literally ready to use "right out of the box". But that's just the start...

eXBT can be completely modified and customized exactly the way you like to precisely meet your needs. This is the same eXBT that Excelisys uses for many of our customers' customization projects. The eXBT is easily expandable, and saves them lots of time and money.

eXBT can also be used for training purposes as it features many advanced development techniques and well-established "best practices".

This software is provided FREE OF CHARGE for your own personal use. As such, it is provided as-is with no warranties or guarantees of any kind. By registering and activating your copy of eXBT, you'll have the option of being kept informed of eXBT news and future updates. Excelisys does not provide any free technical support. If you require any assistance, please feel free to either purchase an hour of our time or visit FMforums and seek some guidance there.

To obtain an unlocked version of the eXBT 3.0 that you can customize, please visit our web site at www.excelisys.com. This proof-of-concept eXBT 3.1go is not available in its unlocked form. The unlocked version of the eXBT 3.0 is not for sale on its own, but is available with

purchase of one of three sizes of time blocks at special introductory discounted rates.

If you would like any assistance customizing eXBT for your project(s), or if you'd like us to customize it for you, you can retain our services by contacting us at 866-592-9235 or <sales@excelisys.com>. One of our dedicated account managers will be happy to talk with you, without all the "geek speak".

Opening eXBT

Double-click the **eX-BizTracker_31go.fp7** file icon.

This will open eXBT with "Admin" access privileges as a default. Alternatively, you can re-login as a different user using one of the three predefined user accounts, but your access will be limited for the moment (more on this later).

Activation

Activation is a simple, two-step process.

First, you register your copy of the eXBT by filling in the required fields in the initial registration form that appears upon first startup. This information is retained locally, and also used to create your unique registration code that will be emailed to the valid email address you provided.

Then, once you enter your registration code, the system will automatically re-log you back in with full admin privileges. If you ever move the activated file to another computer, you'll be required to reactive but don't worry!... your registration information will have been saved. If you don't want to activate your copy right away, that's ok. You can open the eXBT up to 10 times before activation is required.

After a successful login, the *Home* screen will appear.

*Windows Users: For best viewing, it is recommended that you turn off FileMaker Pro's **Status Bar**, which may be found in the **View** menu, before opening the eX-BizTracker.fp7 file.*

The NavBar

Running along the length of the top of the screen at all times is the Navigation Bar, or NavBar, which lets you move around the system between *Home*, *Companies*, *Contacts*, *Vendors*, *Products*, *Invoices*, *Reports*, and *Preferences*. The area contains 11 buttons which are all handled by a single script. Each button passes a different parameter, which the script uses to determine what it's supposed to do.

Points of Interest

As you work your way through the system, there are a few areas you'll want to notice. Here's a quick tour:

- * **Back and Fwd:** These buttons work just like their counterparts found in a web browser. They are active when they turn from gray to blue.
- * **Home Screen:** If you're ever lost, just click the [Home] icon in the NavBar
- * **Dynamic Interface:** If you want to resize the window or just like to "maximize" everything, you'll find the objects within the layouts will stretch to make use of the additional screen space.

- * **Tooltips:** Hover the mouse over just about any button and icon, and the eXBT will reveal a tooltip instructing you on the object's use. We've even made it conditional based on things like which record you are on.
- * **Quick Find:** Type any keywords in any combination into the **Quick Find** field in the *Home* screen and click any of the five adjacent buttons to search within any of the main five data sources (Companies, Contacts, Vendors, Products or Invoices).
- * **Quick Tasks:** Click any of these five buttons to quickly enter a new record into any of the five main data sources.
- * **Scheduled Activities:** List of activities, such as meetings, follow-ups, emails, etc., that fall within a custom specified date range. Use the two date fields to specify the range, using FileMaker's built-in calendar navigator, or choose a predefined date range from the pop-up menu. Click on an activity in the list to view it; click the [+] to create a new activity. Use the [←][↑][→][↓] buttons on your keyboard to select and adjust the month, day or year of any date field.
- * **Invoices at a Glance:** List of invoices that fall within a custom specified date range. Use the two date fields to specify the range, using FileMaker's built-in calendar navigator, or choose a predefined date range from the pop-up menu. Click on an invoice in the list to view it in the Invoices module.
- * **Products to Reorder:** Quick list of products where the current inventory has fallen below their minimums. Click on an item in the list to call up its record in the Products module.
- * **Companies:** Store customer information, including multiple locations, phone numbers and employees.
- * **Contacts:** Track contact information, including locations, phone numbers and email.
- * **Vendors:** Store all your vendors, with multiple locations and contacts, and link them to their products.
- * **Products:** Track products including details, price, cost and weight and taxable status.
- * **Invoices:** Enter and track sales, post payments, print or email invoices, and manage tracking numbers
- * **Reports:** Print customer lists, price lists, invoices, and sales reports; Print charts and graphs using the new charting functions introduced in v11 of FMP.
- * **Preferences:** Create user accounts and prefs, access global settings (such as SMTP settings, company info and logo), and manage the system interface, including the icons and labels in the NavBar.

Accepting Invoices

In most companies, there are specific processes in place that move an order through it's life cycle: starting as a pending order, becoming an order that allocates inventory, then a fulfilled order that has shipped, and lastly, a paid order. The eXBT doesn't attempt to be all things to all people, but more an example of a starting point from which you can shape it to properly support the correct process already in place. Therefore, the process of accepting invoices that we've implemented in eXBT is a fairly straightforward one.

When a new invoice is entered and then the [Accept] button is clicked:

- 1) the status of the invoice is changed from **Open** to **Shipped**;
- 2) the listed items are removed from inventory by subtracting the quantity of each being shipped from their respective product record's current inventory value; and,
- 3) the invoice becomes locked and neither it nor its line items can be modified nor deleted. You will, however, be allowed to enter payments for a locked invoice,t.

Advanced Sorting

In the list views and portals, you can click on any column header button and sort the records in the current found set by the values in that field, and of course clicking a second time will reverse the sort direct. But here's the *really cool* part: you can also hold [shift] and continue to click column headers to perform additional sorts (secondary, tertiary, etc.). Hash marks will appear in each column header to indicate the current sort order.

Phone Number Formatting

From the *Detail* screen in either *Companies*, *Contacts*, and *Vendors*, click **+** in the **Phone and Email** section to add a new point of contact entry in the portal. In the **Number** field, enter a phone number without any delimiters (i.e. dashes, parentheses or periods). The default country should appear in the **Country** field for the selected Location, but you can select any country from its pop-up list. The country you select will determine how the phone number will be formatted. This feature makes use of of a recursive custom function, written in FileMaker Pro 9 Advanced, but which can be used with any version of FileMaker Pro 9.

Product Details and the Web Viewer

From the *Products Detail* screen, click the **Web** tab to call up FileMaker 9's Web Viewer and view the web page for the selected product. This view is fully interactive and will let you navigate beyond the current page. Alternatively, you can click the little "globe" icon next to the URL field, and your default web browser will open to the product's web page.

File Sharing

It is recommended that FileMaker Server 9 or later be used if you are planning to share these files over a network. Although FileMaker Pro has excellent peer-to-peer networking capabilities and could be thought of as a worthy short-term low-capacity multi-user solution, only FileMaker Server provides superior performance hosting your files for multiple guests with automated unattended backups of your important data.

To share the eXBT file over a network via peer-to-peer networking:

- 1a) MAC OS X: From the **FileMaker** menu select **Sharing>FileMaker Network...**
- 1b) WINDOWS: From the **Edit** menu select **Sharing>FileMaker Network...**
 - 2) Set **Network Sharing** to **ON**.
 - 3) Make sure the **eX-BizTracker_31go.fp7** is selected in the list on the left.
 - 4) Set **Network access to file** to **All users** or **Specify users by privilege set** and specify the privilege set.

To open the eXBT as a guest over a network:

- 1) Launch FileMaker Pro.
- 2) From the **File** menu, select **Open Remote...**
- 3) In the window that appears, you should see the shared file **eX-BizTracker_31go.fp7**
*You may need to enter the host computer's IP address by first clicking **Specify host** and*

then entering the address in the fields that appears.

- 4) Double-click on the **eX-BizTracker_31go.fp7** file in the list.
- 5) Login with an authorized username and password.

Managing Accounts

There are three accounts created for you already. These are: *Admin*, *Manager* and *User*. *Admin* has full access privileges. *Manager* has limited access privileges, but can pretty much do anything they want within the solution. The *User* account is specified as "Data Entry" (can create and edit, but can't delete).

To re-login as a different user:

- 1) From the *Home* screen, click **Re-Login**
- 2) Enter any valid username/password, such as:

Username: user

Password: (none)

- 3) Click **OK**. You will now be logged in as a different user.

All three accounts require no password. It is recommended that all accounts have passwords, and that users change their account passwords regularly.

From the *Home* screen, click **Preferences**. The account list will appear. This list contains records which act as placeholders for storing user preferences and represent the actual accounts which are defined elsewhere. The **Salesperson** checkbox is meant to specify which accounts should be included in the value list that appears in the Salesperson pop-up menu in the *Invoices Detail* screen.

Sending Mail via SMTP

Send Mail via SMTP is a feature added since v10 of FileMaker Pro, that enables sending email directly without requiring a user's email client application. The Send via SMTP option is also available to the Send Mail script step. This adds the ability to automate sending via server-side scripts, whereas prior versions required a FileMaker Pro client to send email.

As usual, with power comes responsibility. In this case, it means knowing your SMTP configuration details and correctly formatting email elements. Failure here is easy, often resulting in the general (and least informative) error, 1506: "Email(s) could not be sent successfully". (See below for a common but unexpected reason that triggers this error.)

A common cause of the 1506 error is related to the format of the email address carried by the To: parameter. While the Send via E-mail Client option lets you include the recipient's name with the email address, only the address should be used with the Send via SMTP option. Thus, Full Name <account@domain.com> =BAD. The angle brackets will be rejected by most SMTP servers. Hopefully this single tip will resolve your persistent error 1506 troubles.

Managing the Interface

From the *Preferences/Settings* screen, click the **Manage Interface** button to call up a window that lets you re-arrange the order of the modules, rename their labels, and replace their icons.

Credits and Contact Info

Excelisys Business Tracker was designed and developed by
Andrew Persons and Geoff Ryle of...

Excelisys, Inc.

toll-free: (866) 592-9235

direct: (574) 273-5805

email: sales@excelisys.com

url: www.excelisys.com

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* It is required that you use FileMaker Pro 11 to run the eXBT, as some functions that rely on features exclusive
to 11 may not operate as expected.