

Total Activity Control Work Book

“Training For Success”

Getting Started

Updated 3/5/2007

Learning to Use TAC

A carpenter needs to know what he is building before picking up a hammer, and you need to know how you run your business before using any business software!

Part one of our *training-for-success* program requires that you answer some basic questions about your business.

We will guide you through learning Total Activity Control using

- Self-Guided Steps
- Video Tutorials
- Help Guide
- Phone Support

When you have completed this workbook, you will be able to:

- Invoice your customers
- Print service routes
- Post receivables
- Print a deposit report
- Print a sales report

Your First Step

Collect the Data Needed in Parts A and B.

- Company Worksheet
- Sample Customers

Track your progress on the *Progress Checklist Page* at the back of the workbook.

Let's Get Started!

Part A - Company Worksheet

This first part requires that you answer some basic questions about your business. (A good carpenter begins a job with a blueprint!)

Required! Fill out the answers to the questions on the **Company Profile Worksheet** before you begin. Our training support staff will ask you to fax this information to our office when you call.

Part 1 - General Company Information

Name of Company _____

Address _____

City _____ State/Province _____ Code _____

Phone _____ Fax _____

How do you group your customers (market types)?

Examples: COM (Commercial) RES (Residential) FARM (Farm)

Who are the employees in your company?

Name	3 Letter Initials	Email address	Check if driver
<i>Examples:</i> Bob Jones	BPJ	bob@mycompany.com	<input checked="" type="checkbox"/>
Mary Beth Evans	MBE	marybeth@yahoo.com	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>
_____	_____	_____	<input type="checkbox"/>

What are the trucks/vehicle codes?

Description	Code	Driver	License Plate	Weight Capacity	Volume Capacity	Odometer
<i>Examples:</i> Pump Truck 123	P123	Steve	COM51234	7000 lbs	1,000 gal	27,300
_____	_____	_____	_____	_____	_____	_____
_____	_____	_____	_____	_____	_____	_____

Company Profile Worksheet

Part 2 – Services Provided

Note: Use a separate worksheet for each service provided by your company.

Service Provided	Taxed?	Tax Rate	Second Tax Rate
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Examples:

Pump Tank

No

-

-

Excavation

Yes

5%

3%

_____	_____	_____	_____
_____	_____	_____	_____

What is the list of things you charge for?

Code	Description	Charge Amount
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Examples:

P100

Pump 100 Fixed Rate

100/pump

PICK

Pickup

50/each

_____	_____	_____
_____	_____	_____

How do you bill your customers for this service?

Choose one:

- Pro-rated
- Pro-rated whole month
- Pro-rated 28 day
- Anniversary 28 day
- Anniversary whole month

What do you put on your work orders?

Check all that apply:

- Site Directions
- Driver Note
- Invoice Note
- Site Equipment Note
- Site Equipment Tank Information
- Company Name and Logo
- Operational Service Message
- Item, Quantity, Rate Code and Description
- Service Stop and Units
- C.O.D.
- Driver Note
- Other _____

Company Profile Worksheet

➔ If you are a rental company, continue to Part 3. If not, please skip to Part 4 below.

Part 3 – For Rental Companies Only

What kinds of units do you rent?

Code	Type / Description	Quantity in Inventory	Starting /Ending Serial No.'s
<i>Examples:</i>			
R	Regular Unit	500	R1001 - R1500
RO20	20' Roll Off	50	RO2001 - RO2050
_____	_____	_____	_____ - _____
_____	_____	_____	_____ - _____

For each of the items you rent, please indicate at least 2 charge rates (e.g., daily /weekly/monthly rate)

Code	Charge Rate 1	Charge Rate 2	Other(s)
<i>Examples:</i>			
R	50/day	250/week	Damage, Disposal charges
RO20	120/week	400/month	
_____	_____	_____	_____
_____	_____	_____	_____

What do you charge for in addition to monthly rental?

Code	Description	Charge Rate
<i>Examples:</i>		
CLN	Extra Cleaning	25/unit
WE	Weekend Rental	100/unit
WAIT	Waiting Time	25/hr
_____	_____	_____
_____	_____	_____

Part 4 – Check Your Progress!

☺ I have completed the Company Profile Worksheets. (A)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Part B - Sample Customers

Gather Ten Customers Information

You will need ten sample customers to learn TAC. You will be guided through a series of steps that give you practice using the TAC software. Have no fear, all information you enter can be removed and/or saved for your actual company's operation, your choice.

For each customer, you will need the following:

- Billing name, address, phone number, fax number and contact name, i.e., accounts payable
- Service name, address, phone number, fax and contact name, i.e., superintendent
- 1-2 old invoices for each customer
- List of rate codes you use to charge your customers
- List of vehicles
- **Portable Toilet Company**
 - Types of units you rent
 - Approximate number of units
 - Two prices for each type of unit, e.g., once a week service and twice a week service
 - Service route number and day for each customer
 - For each customers' units: the delivery date, bill-through date and rates
- **Septic Company**
 - The rate codes that will advance a reminder date for next pump
 - Disposal locations you utilize
- **Roll-off Company**
 - Disposal locations
- **Residential and Commercial Trash**
 - Types of services and rates for each site
 - Approximate number of services, i.e., customers
 - Service route, day for each customer
- **Grease**
 - Service interval for each grease account
 - Information on the equipment at each customer location

☺ I have gathered my ten sample customers.

(B)

Congratulations! Keep track of your progress on the **Progress Checklist** page.


Now, call our technical support at 732-747-0113. Our trainers will review your information, and give you a work order number for your training.

Part C - Getting Started

Please be sure you've completed the Company Profile Worksheet and gathered your ten customers before you begin this section.

Step 1 Using Help

Find answers using the index

1. Start TAC by double-clicking on TAC icon 
2. Press **F1** key
3. Click on the **Index** tab
4. Type in "**Add a Customer**"
5. See that instructions on Adding Your Customers opened up.

☺ I know how to find a topic in the index

(1.1)

Watching a video tutorial

1. Click on the link [*A video of this tutorial is available here.*](#)
2. Watch the video "How to Add a Customer"

☺ I know how to watch a video

(1.2)

3. Here are nine more topics to look up in the index so you can see how to find information in the Help Guide.
 - a. Adding A Site
 - b. Notes (In the box that pops up with all the Note topics, select the topic "Notes")
 - c. Adding Units and Price List
 - d. Reference File Management
 - e. Work Order Creation
 - f. Delivering Units
 - g. Invoicing A Line Item
 - h. Payments (In the box that pops up, select the topic "Applying a Payment to a Site")
 - i. User Name


☺ I can use the Help Guide index to find information

(1.3)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

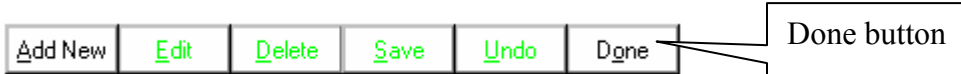
Step 2 Opening Forms

Opening and Closing a Form

1. Use the mouse to click on the picture of the customer  on the tool bar under the menu. This opens the Customer Master.


☺ I know how to open a form from the tool bar. (2.1)

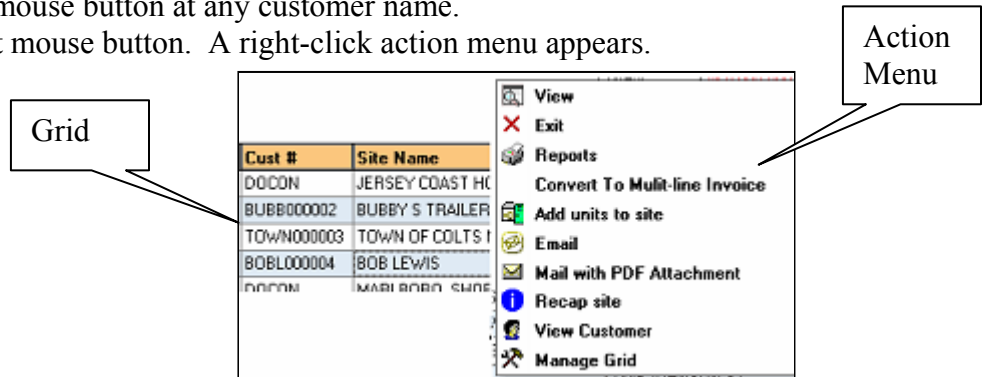
2. Use the mouse to click the **Done** command button at the bottom of the form.



☺ I know how to close a form using the Done button. (2.2)

Selecting an Item from a Grid

3. Click on the picture of the service site  on the toolbar and open the Site Master.
4. Click the **Search** button on the Search tab.
5. See the list of sites that appears in the **grid**.
6. Point with the left mouse button at any customer name.
7. Click with the right mouse button. A right-click action menu appears.



8. Click on the first entry in the list, **View**.
9. The selected site is now in the Site Master screen.

☺ I know how to use the grid to select an item to view. (2.3)


10. Use the mouse to click the **Done** command button at the bottom of the form.

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 3: Searching for Customer Information

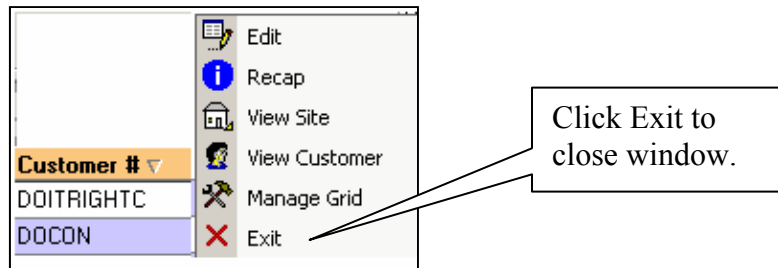
TAC gives you many ways to search for information in the system.

F7 Customer Search

1. Start TAC by double-clicking on TAC icon 
2. Use the **F7** function key on your keyboard.
3. This opens up the F7 Customer Search
4. Type the word **RIGHT** in the **Name** field.
5. See the list of customers and sites in the grid that contain the word “RIGHT” in the name.
6. Clear out the name and try out some other fields to see the list of matching customers and sites.

☺ I know how to search for customers and sites using **F7** function key. (3.1)

7. Point with the left mouse button at any customer in the list.
8. Click with the right mouse button. A right-click action menu appears.
9. Click on the last item in the list, **Exit**.



☺ I know how to use the grid to select **Exit** and close the window. (3.2)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 4: Watch the Training Videos

The TAC system has an Education Center which appears when the system is first opened and can be found on the Main Menu across the top, under Help. There are 16 training videos (look for the icons with a black movie camera) in the Education Center. Watch them all like a TV show, take no notes, the idea is that you will learn the basic navigational tools and where information is stored in the TAC system. At each step we will ask you to re-watch specific videos, e.g., Video Number 7 - Add a Customer.

The Education Center videos also come with written instructions (icons with a piece of paper and a big yellow question mark), which you can print and use as a guide while you use the system. You can also start a video and minimize it, and follow the verbal directions to enter information as the video plays.

☺ I have watched the training videos. (4.1)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 5: Add Ten Customers

Watch video number 7 Add a Customer. This video is located on the Education Center in the section **Customer and Billing**, third button from the bottom. Add ten customers into the system.

☺ I have entered ten customers. (5.1)

Print a list of customers you have entered. This report is found on the **Main Menu** by selecting **Reports / Customer / Customer tab**. Click **Search** in center of form and double-click on **Report Number 12 – Customer Name, Contact Phone and Email**.

Check to make sure you entered your customers correctly.

☺ I ran the customer list report. (5.2)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 6: Add Zip Codes

Watch Video 21 – Add Zip Codes. You can speed the entry of names and addresses by having the computer populate the city, and state based upon the zip code. Watch video 21 – Add Zip Codes. Add a single zip code from your state and then use the **right-click on the mouse** to bring up the action menu and select the option to **add remaining zip codes for your state**.

☺ I have added zip codes to the system. (6.1)

Step 7: Add a Service Location/ Site for Each Customer

Watch Video 1 – Add a Service Location. Now add a single service location for each of the 10 customers. When done, print a list of site/service locations you have entered. This report is found on the **Main Menu** by selecting **Reports / Sites /Sites tab**. Click **Search** in center of form and double-click on **Report Number 11 – Contact list**.

Check to make sure you have entered the service locations correctly.

☺ I have printed the contact list with the new sites. (7.1)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 8: Update Reference Files for Your Company

Reference files are where you keep the codes you use to define your charge types, unit types, etc. This is how each company customizes the system for their own business.

Watch Video 20 – Add your Rate Codes. This video shows you how to edit all reference files. Reference files are added or edited from the **Main Menu** by selecting **Admin / Reference Files**.

Edit **Reference File 06 – Market types.** These codes are used to report sales by type of customers. Add your codes and delete those you do not plan to use.

☺ I have added market types to Reference File 06. (8.1)

Other reference files you should edit are:

Reference File 01 – Type of Work Orders (code used on work orders)

Reference File 07 – Type of unit (portables, and trash companies)

Reference File 15 – Rate codes (codes used for charges)

☺ I have edited additional reference files. (8.2)

When done, print a list of each reference file you have modified. These reports are found on the **Main Menu** by selecting **Reports / Admin / Reference File tab**. Click left/right on the reference file you want to print, e.g., **Number 1 01 – Type of Work Order**. Check to make sure you have changed the reference file correctly.

☺ I have printed reference file reports. (8.3)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 9: Add Rental Units (Portable Toilet, Residential, Commercial, Roll-offs)

On the printed list of rental units types (Reference File 07), write down the number of each type of unit your company manages (round up to nearest 10 or 100, or 1000). Then write down a serial number range for each type. Keep serial number ranges at least 500 apart to allow for growth, and use the same number range on all units i.e., 1000 or 10000.

Examples of unit counts and serial number ranges

- 500 20 yard roll offs: Enter 1000 – 1500
- 2000 Regular portable toilets: Enter 3000 – 5000
- 10 Wheelchair-accessible portable toilets: Enter 1000 – 1010
- 200 Sinks: Enter 2000 - 2200

To bulk add units, you go to **Main Menu** selection **Admin / Database Utilities / General / Bulk Unit Add tab**.

1. **Watch Video 16 – Add Units and Create a Price Book**
2. Use pull down to pick a type of unit.
3. Enter starting and ending serial number range, and when you tab off of the upper number, the “**Add Rental Units**” button will activate.
4. Click to add serial numbers.

Repeat for each type of unit you are managing.

☺ I have added units to the system. (9.1)

When done, print a list of unit counts. This report is found on the **Main Menu** by selecting **Reports / Inventory / Rental unit tab**. Check the radio option **Both** for in the **Status box** on top of report form, then click **Search**.

Click left/right on report **Number 13 – Utilization Snap Shot** to make sure you have entered the correct number of rental units.

☺ I have printed the Rental Unit Utilization report. (9.2)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 10: Add Price Books

Watch Video 16 – Add Units and Create a Price Book.

Now add at least two price book entries for each type of unit you manage. If you manage:

- **Portable toilets:** Enter one entry for once-a-week service and another for twice-a-week service for each type of unit.
- **Trailer rental, storage rental or residential trash:** Enter a price book for monthly, quarterly and yearly billing.

If you have customer-specific prices, you can always add an abbreviation after the unit type for the customer, or you can use the site or customer **assign price** option when assigning units to a site (see **Video 14 – Deliver a Unit**).

☺ I have printed the added price books to the system. (10.1)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 11: Deliver Units to a Site

Watch Video 14 – Deliver a Unit

This section is for

- Portable toilet
- Space or trailer rental
- Residential, commercial and roll-off solid waste

Select a single site and assign a unit. If you do not know the delivery date, use January 1st of the current year.

☺ I have assigned a unit to a site. (11.1)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 12: Generate an Invoice

You can generate and delete an invoice as many times as you want. We suggest you work with one site until the invoice looks the way you want it to. Stick to one service to bill for each site, and as you get more familiar with the features, you can expand to as many services as your company provides.

Assign units and generate an invoice for all 10 service locations. This will help you remember.

Watch Video 15 – Invoice a Unit if your business is

- Portable toilet
- Space or trailer rental
- Residential, commercial and roll-off solid waste

Watch Video 3 – Add a Charge and Video 4 – Print an Invoice if your business is

- Septic
- Grease

☺ I have assigned units and generated invoices for 10 sites. (12.1)

Please check the Help Guide for billing method alternatives. Review the following sections on invoicing:

- **Sales Tax**
 - **Help Guide “Sales Tax”**
 - **Help Guide “Sales Tax Rates”**
 - **Help Guide “Setting Up the System for Your Company”**
 - **Help Guide “Canadian GST and PST Taxes”**
- **Service Descriptions**
 - **Education Center Video 20 – Add Your Rate Codes**
- **Company name, address, phone numbers**
 - **Education Center Video 18 - Set Up Your Company Information**
 - **Help Guide “Setting Up the System for Your Company”**
- **Company Logo**
 - **Help “Logo”**
- **Billing Methods**
 - **Help Guide “Creating an Invoice”**

☺ I have reviewed billing method and tax information in Help. (12.2)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 13: Run Sales Report

Read **Education Center Item 9 Run Sales Report** printed instructions

☺ I ran a sales report. (13.1)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 14: Posting Receivables

Watch **Education Center Video 5 – Apply a Payment**

Select an invoice to pay and post the payment. Run the deposit report to see that the payment was posted. This report is on the **Main Menu**, on the **Reports / Financial /Receivables tab**. Enter the **Post Date** and click **Search**. Print **Report 10 – Deposit Report** and **Report 20 – Date Time Order of Entry**, so you can check your payment entries.

Continue to pay off **all** the sample invoices you generated.

☺ I paid off all my sample invoices. (14.1)

Now run the deposit report again to make sure you entered the payments correctly.

☺ I ran the deposit reports. (14.2)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

Step 15: Assigning a Service Stop

Watch Video 12- Find a Site's Map Location

Watch Video 11 – Assign a Site to a Service Route

Assign each of the 10 sample sites to a service stop.

☺ I assigned 10 sample sites to service stops. (15.1)

Print the service stops to validate your entries. Go to **Main Menu** selection **Report/ Dispatch/Service Stops tab**. Check the radio option **Route** in the “**Search By**” box on search form, and check the route you have added and then click **Search**. Then left right click **Report 11- Route Sheet List** and **Report 12- Route Sheet List With Units First**.

There are several route sheet formats to choose from. Print all, and see which is the best match for your company.

☺ I printed service route sheets. (15.2)

Congratulations! Keep track of your progress on the **Progress Checklist** page.

This completes the Learning to Use TAC Work Book.

Call Clear Computing and let us know you've successfully completed all steps for your **free certificate**.

Part D - Progress Checklist

Keep track of your progress and receive a free gift certificate when complete.

☺ I have completed filling out my Company Profile Worksheet	<input type="checkbox"/> (A)
☺ I have gathered my ten sample customers.	<input type="checkbox"/> (B)
☺ I know how to find a topic in the index	<input type="checkbox"/> (1.1)
☺ I know how to watch a video	<input type="checkbox"/> (1.2)
☺ I can use the Help Guide index to find information	<input type="checkbox"/> (1.3)
☺ I know how to open a form from the tool bar.	<input type="checkbox"/> (2.1)
☺ I know how to close a form using the Done button.	<input type="checkbox"/> (2.2)
☺ I know how to use the grid to select an item to view.	<input type="checkbox"/> (2.3)
☺ I know how to search for customers and sites using F7 function key	<input type="checkbox"/> (3.1)
☺ I know how to use the grid to select Exit and close the window	<input type="checkbox"/> (3.2)
☺ I have watched the training videos.	<input type="checkbox"/> (4.1)
☺ I have entered ten customers.	<input type="checkbox"/> (5.1)
☺ I ran the customer list report.	<input type="checkbox"/> (5.2)
☺ I have added zip codes to the system.	<input type="checkbox"/> (6.1)
☺ I have printed the contact list with the new sites.	<input type="checkbox"/> (7.1)
☺ I have added market types to Reference File 06.	<input type="checkbox"/> (8.1)
☺ I have edited additional reference files.	<input type="checkbox"/> (8.2)
☺ I have printed reference file reports.	<input type="checkbox"/> (8.3)
☺ I have added units to the system.	<input type="checkbox"/> (9.1)
☺ I have printed the Rental Unit Utilization report.	<input type="checkbox"/> (9.2)
☺ I have printed the added price books to the system.	<input type="checkbox"/> (10.1)
☺ I have assigned a unit to a site.	<input type="checkbox"/> (11.1)
☺ I have assigned units and generated invoices for 10 sites.	<input type="checkbox"/> (12.1)
☺ I have reviewed billing method and tax information in Help.	<input type="checkbox"/> (12.2)
☺ I ran a sales report.	<input type="checkbox"/> (13.1)
☺ I paid off all my sample invoices.	<input type="checkbox"/> (14.1)
☺ I ran the deposit reports.	<input type="checkbox"/> (14.2)
☺ I assigned 10 sample sites to service stops.	<input type="checkbox"/> (15.2)
☺ I printed service route sheets.	<input type="checkbox"/> (15.2)

Appendix A Training Class Agendas

The following appendices are the classroom topics that are covered in the hands-on training classes offered throughout the year.

Introductory - Getting Started “How to Use TAC”

Intermediate - Customizing TAC for Your Company

Advanced - Business Operations Guide