

The logo for Round Tracker v4 PRO is displayed within a rectangular frame. The frame has a blue top bar, a green middle bar, and a black bottom section. The text 'Round Tracker v4' is in white, 'PRO' is in red, and 'Round Management System' is in yellow.

# Round Tracker v4 *PRO*

Round Management System

## Round Tracker v4 *PRO* – Users Guide

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**Thank you for choosing to use Round Tracker v4 *PRO*!**

Although Round Tracker v4 *PRO* is very simple to use we want you to get the most from the program so please read the following instructions carefully.

As well as these simple, clear instructions you can also find further online help and support through video tutorials and a dedicated support forum at [www.roundtracker.info](http://www.roundtracker.info)

We are very confident that if you follow these instructions you will be impressed at the simplicity, speed and flexibility with which you can manage the scheduling, invoicing and accounts of your business.

If you haven't already done so then please join our support forum and feel free to ask any questions you may have regarding RTv4 *PRO* and tell us how you get on!

**You will need Microsoft Excel 2003 or a more recent version to use RTv4 *PRO*.**  
**If you do not have Excel then you can download a 60 day free trial here:**  
<http://us20.trymicrosoftoffice.com/default.aspx?culture=en-US>

(Screenshots shown in this manual are from Microsoft Excel 2007. Functions and appearance may vary according to the version of Excel used.)

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# Chapter 1

## FIRST THINGS FIRST

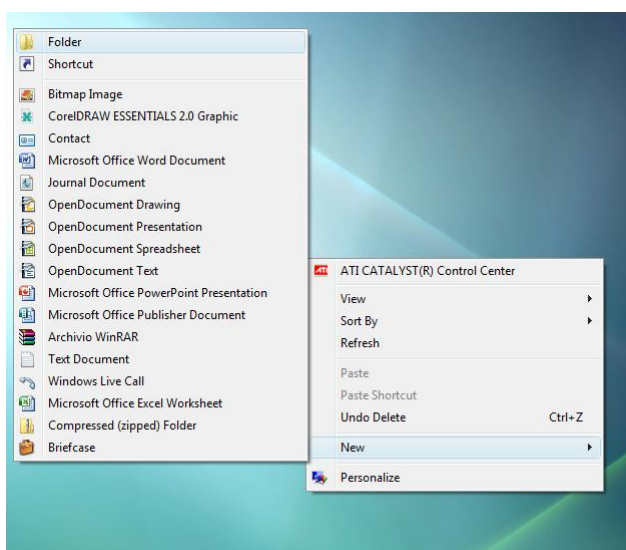
Let's start off by backing up and then personalising your RTv4PRO file.

Personalising your file is done on the **Settings** page.

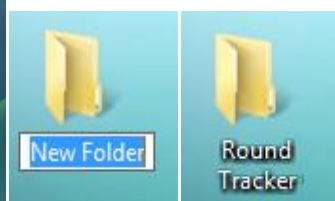
**To get the most from RTv4 PRO it's very important to personalise the file - so please don't skip this bit!**

### Backup your file

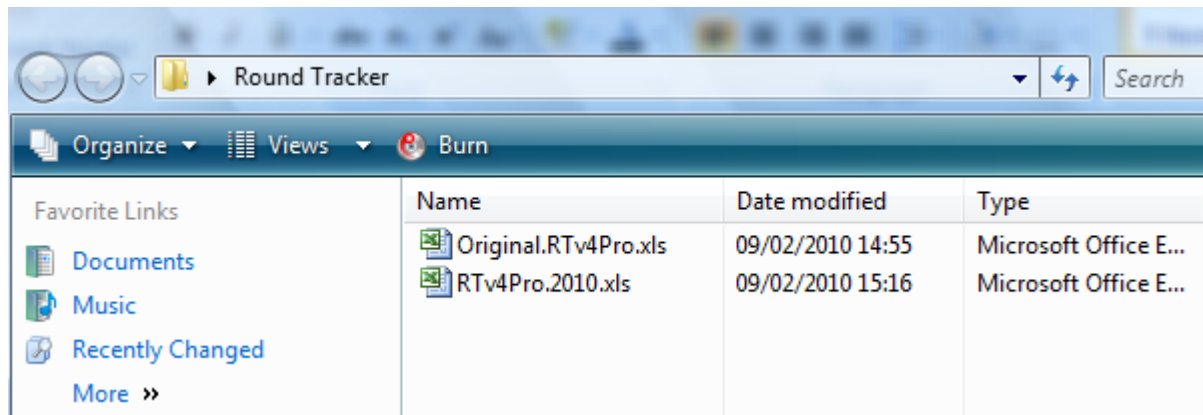
The first thing we'll do is to create a backup copy of the original file. Right click on the computer desktop and select **New** – and then **Folder**



A new folder will appear which you can rename whatever you like. This is where you will keep your Round Tracker files.



Save your original file in this folder as well and create another copy of it, renaming the file as you wish. (Open the file, Save AS, select folder destination)



**As a security measure we strongly recommend that you make regular backup copies of your file.**

You can make a back up your file by copying it onto an external storage device such as an external hard drive, a USB key or SD memory card.

Another recommended system of backing up files which has the advantage of being able to access your file from any computer on the internet is creating online backups. This can be done for free by using a service like [www.dropbox.com](http://www.dropbox.com) (This free service also allows file sharing).

(We recommend that you still keep an original file on your desktop folder and use your dropbox folder for back up copies).

So now let's open the file and you will see that it opens at the **Home** page.

Take some time to look over the examples shown to get the general idea and then delete the contents of these cells by selecting the cells and pressing the **Delete** or **Backspace** button. (How to deleting entire rows is explained later).

**Before using RTv4 *PRO* for the first time it is important to personalise the file.**

To do this we select the **Settings** page using the header tabs at the top of the page.

Client ID	Late	Days Late	Re-Schedule	Owe	Mark / Order	Last Done	Premises Name
10							
9							
8							
7							
6							

## Personalise your RTv4 *PRO* file

**Invoice Settings**

Invoice Header Details	
<b>Business Name:</b>	Your Business Name
<b>Slogan / Other Text:</b>	Your slogan or other text
<b>Address / Text Line 1:</b>	1 Your Street, Anytown, Any County, Postcode
<b>Address / Line 2:</b>	Secondary address line or leave blank
<b>VAT number / Other:</b>	VAT no. / Company Registration no.
<b>Telephone / Fax:</b>	Tel: 01234 567890 Mob: 07771 2345678
<b>Website and Email Address:</b>	Web site and email address. Use spaces to align as desired.

Payment Details	
<b>Cheques Payable to:</b>	Your Business Name
<b>Send to (Full address):</b>	1 Your Street, Anytown, Any County, Postcode
<b>Bank Account Name:</b>	Your Bank Account Name
<b>Bank Account Number:</b>	12345678
<b>Bank Sort Code:</b>	xx-xx-xx

**Payment Terms (Days):** 28

**VAT Settings**  
If your VAT rate changes during the year enter the new Rate 2 below and the date from which it becomes effective

VAT Rate 1	VAT Rate 2	Effective Date

**Invoice Settings:**  
The details which you wish to appear on your invoices can be entered here.

**IMPORTANT:**  
Before using Round Tracker be sure to enter the correct VAT rate. If you are not VAT registered then leave it blank.

Invoices will show up as LATE on the INCOME HISTORY page if they still remain unpaid once the Payment Terms (Days) has expired.

**a.) VAT Rate 1**

Enter the correct VAT Rate as a whole number. This will automatically make sure that VAT is added to your invoices and totals where applicable. (If you are not VAT registered then leave this cell blank.)

**b.) VAT Rate 2**

In the rare instance that your VAT status changes or if your VAT rate changes then you can use the second VAT rate. As the note explains, simply enter the new rate and the date from which it becomes effective.

**c.) Invoice Header Details**

This section allows you to enter your invoice details as you wish them to appear on your invoices.

To check how the details appear click on the invoice template click on the **INVOICE VIEW** tab. (See *Chapter 6, Invoice View*)

**d.) Payment Details**

In this section enter your payment details as you wish them to appear at the bottom of your invoices.

**e.) Payment Terms (Days)**

This setting tells Round Tracker how many days are allowed to pass from the invoice date before an invoice is displayed as being **Late** on the **Income History** page.

Invoice ID	Client ID	Date	Price	VAT	Total inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account	Outstanding	Late
442	184	07 Jan 10	50.00		50.00	07 Jan 10			Direct Debit	Business Account		
441	183	07 Jan 10	50.00		50.00				Cash	Money Handled	50.00	LATE
440	182	07 Jan 10	50.00		50.00				Cash	Money Handled	50.00	LATE
439	176	07 Jan 10	30.00		30.00	07 Jan 10			Cash	Money Handled		
438	162	07 Jan 10	12.00		12.00	07 Jan 10			PayPal	Money Handled		
437	117	07 Jan 10	30.00		30.00	07 Jan 10			Cash	Money Handled		

The payment terms also are displayed on the invoice. If you wish to hide this section on your invoices then use the formatting tool to set the text colour to white in **Invoice View**.

<i>Please send a cheque to:</i> Your Bank Account Name 1 Your Street, Anytown, Any County, Postcode  <i>Or pay by bank transfer to:</i> <b>Beneficiary:</b> Your Bank Account Name <b>Account No:</b> 12345678 <b>Sort Code:</b> xx-xx-xx	<b>Sub Total:</b>	10.00
	<b>VAT:</b>	
	<b>Total:</b>	<b>10.00</b>
	Payment Strictly 28 Days	

If you scroll down on the **Settings** page you'll notice that there are other things that you can modify on Round Tracker to suit your business such as a list of your suppliers, names of bank accounts, payment methods, transaction codes used for your accounts and advertising methods employed.



## Chapter 2

# A QUICK LOOK AT THE VARIOUS PAGES



**Settings:** We've already had a quick look at the **Settings** page which is where you can tailor RTv4 PRO to your business.

**Overview:** Here you can see a breakdown of how your business is doing. You can view a detailed display of *how many* customers you have, *what kind* of customers and *how you got them*. Advertising campaigns can be monitored. A helpful breakdown of your accounts gives a good overview of where your money goes and you will no doubt find the charts helpful.

Rota Frequency: 4 weekly		Average Rota Values (select Rota Frequency)							
Priority	Level	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Misc.	Total
Cream work	A	603.50	1,113.33	1,319.27	591.00	935.00			4,562.10
Good	B	191.00	389.67	219.00	200.00	199.50			1,199.17
OK	C	91.83	128.67	169.00	180.00	32.00			601.50
Poor	D	171.00	45.33	159.80	367.81	198.74			942.68
Very Poor	E								
Totals		1,057.33	1,677.00	1,867.07	1,338.81	1,365.24			7,305.44
								Total A,B,C Priority Work	6,362.76

**Home:** This is at the heart of RTv4 PRO, and where you will enter your customer details, update your round , do your scheduling and organising and create the short lists of work to be printed as job lists.

**Job List:** Short lists of work to be done can be sent here. This page is a black and white, printer friendly page where you can then sort the list, hide prices from employees if you wish and include a brief note or instructions.

**Income History:** When jobs have been done you can send them to this page to mark *if*, *when* and *how* the job was paid for. Invoices can be tracked and detailed debt lists printed. From here, invoices and matching envelopes can be created and jobs which have paid can then be sent from here to your accounts records.

**Invoice View:** We had a quick look at this page already. Here is where the invoice layout can be arranged and formatted to your taste. You don't usually need to come to this page once the invoice settings have been established though you can edit the body of the invoice if you wish to add more information on individual invoices.

**Accounts:** This is where you will record your money movements. Income can be sent here automatically from the **Income History** page and then marked as *Sales*. Expenses can be entered as well as other transactions such as deposits and transfers. There are 5 accounts you can track and use. Four of these can be names on the **Settings** page.

**Quote Calculator:** This handy tool allows you to quote for jobs based on the variables of target hourly rate, estimated time per section or window and the number of windows. Further expenses can be added such as materials or travel costs etc. It is particularly helpful for large jobs such as schools which may have many sections to the job. The job can be broken down into sections, estimating the time to clean one kind of window and multiplying up etc.

**Help:** The help page is a condensed version of this manual. It's a kind of quick start guide, but we recommend that you also read this manual carefully. Before reading on it would be worth just quickly having a look over the **Help** page if you haven't already done so. It will give you a good idea of what the icons at the top of the various headers are for and a general idea of how to use the program. We also strongly recommend that you register and join the dedicated Round Tracker support forum at [www.roundtracker.info](http://www.roundtracker.info)

Members receive free updates and tips and the answers to frequently asked questions can be found here.

## Chapter 3

# GENERAL USEFUL INFORMATION

### View Settings

Since the **Home** page is quite large, there are two modes for viewing it depending on what you are doing.

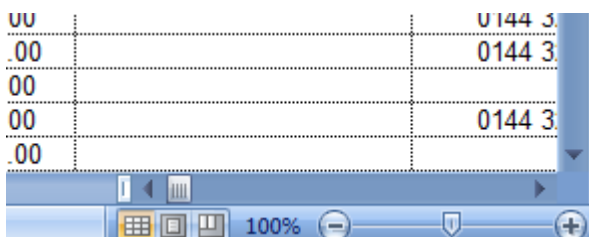


When entering new customer details then you may prefer to view the page in **Customer Mode**. For day to day use the default **Round Scheduling Mode** is used.

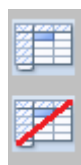
These can be selected by clicking on one of the **Viewing Mode** icons.

The zoom view can also be adjusted at the bottom of the page or by selecting **View, Zoom** and the level of zoom required.

(Press **Escape** key to show Excel taskbar and select **Full Screen** to return to full screen mode.)



To view all of the information on the **Home** page you will need to scroll up and down, left and right using the scroll bars shown here or by selecting a cell and navigating the page with the cursor keys.



Use the Freeze Panes on/off buttons as a netbook.

if you are using a small screen such

## Performing Filters

Filtering your work list is a fundamental part of using RTv4 PRO correctly. Some filters have been automated by clicking on the icons such as these below:

Filter for jobs which are marked as **LATE**



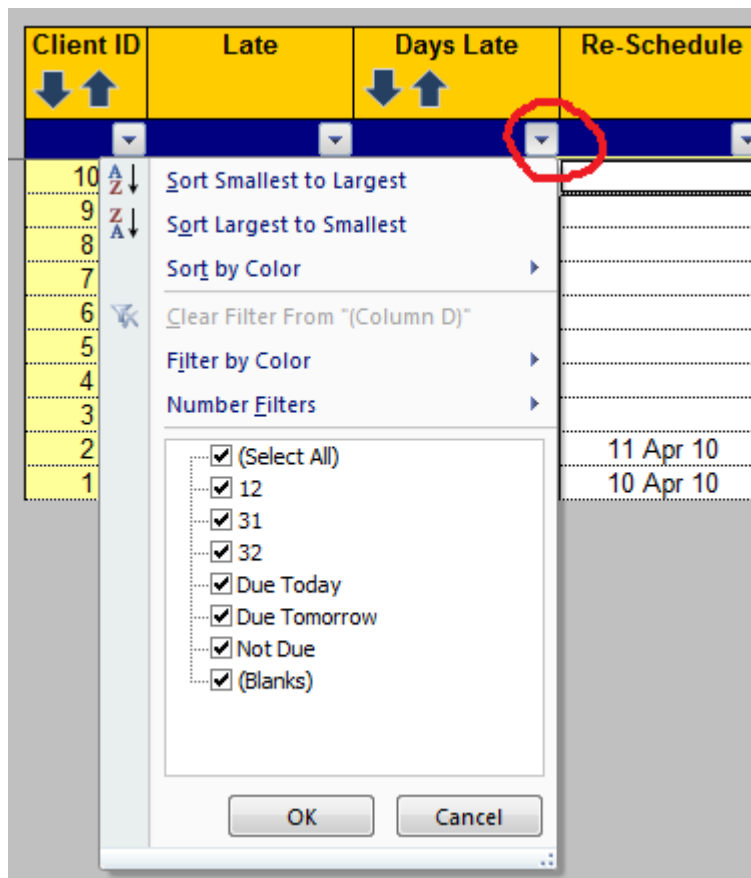
Perform a filter to see which customers owe you money



Click on this icon to see a list of customers you need to call



You can perform many different combinations of filters using the grey filter arrows.



Pressing the filter arrow will bring up a box like this.

(The box shown is the MS Excel 2007 version which allows multiple filters to be active on one column. Previous versions of Excel allow only one filter at a time per column.)

You can easily create shortlists to view or print by selecting or deselecting the information you want to be visible in the list.



Clicking the **Restore** button at the top of the screen undoes any active filters, displays the default **Round Scheduling Mode** and brings the cursor back to the first cell in the **Last Done** column.

## Shortcut keys

**NOTE:** Do not use the **Cut (Ctrl+X)** shortcut when using RTv4 PRO

Some shortcut keys which you may find useful are:

<b>Copy</b>	= Ctrl + C
<b>Paste</b>	= Ctrl + V
<b>Undo</b>	= Ctrl + Z
<b>Redo</b>	= Ctrl + Y
<b>Save</b>	= Ctrl + S
<b>Print</b>	= Ctrl + P
<b>Navigate Pages</b>	= Ctrl + Page Up/Page Down
<b>Scroll Right</b>	= Alt + Page Up/Page Down
<b>Move to next cell right</b>	= Tab Key
<b>Move to next cell left</b>	= Shift + Tab Key
<b>Edit cell contents</b>	= F2
<b>Select multiple cells</b>	= Shift + Cursor keys
<b>Excel Help</b>	= F1

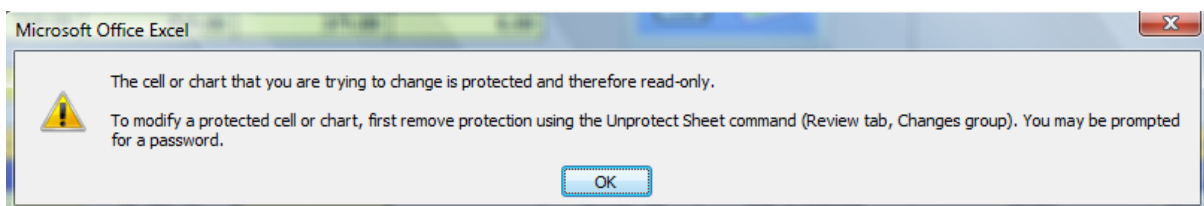
For more Excel training and help with Excel visit:

<http://office.microsoft.com/en-gb/excel/FX100646951033.aspx>

## Password Protection

You will notice that **you can only enter information in cells which have a white background.** (Except for the **Job List** page which has protected white cells)

Attempting to enter information into other cells will likely result in a message like this being displayed:



This is normal and **you do not need a password.**

The above message is shown because the cell you are trying to enter information into is protected and likely contains formulas integral to the workings of RTv4 *PRO*. If these cells were left unprotected these formulas could be easily deleted or over written which would obviously cause problems!

**For this reason please don't ask us for a password to unlock the sheets.**

## Chapter 4

# THE HOME PAGE

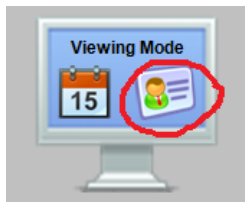
### Things you can do on the Home page:

- Add new customers
- Update customer status
- Sort the order of your work
- Schedule and forecast work
- Re-schedule work
- View work overdue
- Prioritise work
- Change customer status
- View total outstanding payments
- Create and print job lists
- Print various lists or full round details
- Assign work to teams or individuals
- Track advertising and marketing efforts
- Notify customers of cleans
- View various list totals and averages

## Entering and Updating of Customer Details

To enter your customer details is a simple matter of entering the relevant information in the various columns.

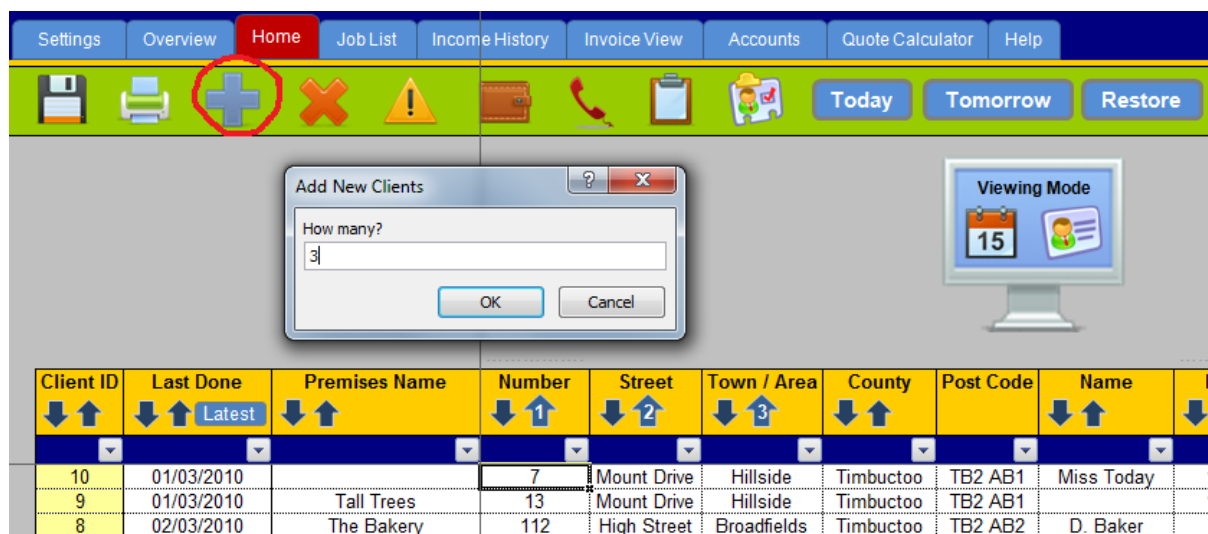
First click the **Customer Details** view mode here.



This hides the round scheduling information and makes it easier to enter the relevant customer details.

Then click the **Add New Customer** icon and you will then be prompted to enter how many customers you wish to add.

*(Please note that this process may take several minutes the first time if you add a large number of customers in one go).*



As you add new customer rows the column widths will auto adjust to be wide enough for the text entered.

The **Client ID** is automatically generated in numerical order.

Eg. Let's say you have 3 new customers in the same street to enter. We would enter 3 in the **Add New Clients** box shown above and 3 new rows will appear.



First enter the details which the jobs have in common such as the **Street**, **Town/Area**, **County**, **Post Code**, **Interval** and **Status** (New Customer) in the first row.

We can then copy the contents of the entire row by selecting the selecting the cells as shown below and pressing **CTRL+C**. (Use the **Shift** and Cursor **Keys** together to select the cells you wish to highlight and copy).

Street	Town / Area	County	Post Code	Name	Price	Equipment / Notes	Contact Info	Interval	Preferred Day	Status
↓ ↑ 2	↓ ↑ 3	↓ ↑		↓ ↑	↓ ↑	↓ ↑		↓ ↑	↓ ↑	↓ ↑
The Green	Newtown	Timbuctoo	TB2 AB4					28	Wednesday	New Customer
								28		
								28		
Mount Drive	Hillside	Timbuctoo	TB2 AB1	Miss Today	10.00			84	Monday	Irregular

Then select the two cells below the starting point of the selection...

Street	Town / Area	County	Post Code	Name	Price	Equipment / Notes	Contact Info	Interval	Preferred Day	Status
↓ ↑ 2	↓ ↑ 3	↓ ↑		↓ ↑	↓ ↑	↓ ↑		↓ ↑	↓ ↑	↓ ↑
The Green	Newtown	Timbuctoo	TB2 AB4					28	Wednesday	New Customer
								28		
								28		
Mount Drive	Hillside	Timbuctoo	TB2 AB1	Miss Today	10.00			84	Monday	Irregular

And press **CTRL+V** to paste the selection in the two rows below.

Street	Town / Area	County	Post Code	Name	Price	Equipment / Notes	Contact Info	Interval	Preferred Day	Status
↓ ↑ 2	↓ ↑ 3	↓ ↑		↓ ↑	↓ ↑	↓ ↑		↓ ↑	↓ ↑	↓ ↑
The Green	Newtown	Timbuctoo	TB2 AB4					28	Wednesday	New Customer
The Green	Newtown	Timbuctoo	TB2 AB4					28	Wednesday	New Customer
The Green	Newtown	Timbuctoo	TB2 AB4					28	Wednesday	New Customer
Mount Drive	Hillside	Timbuctoo	TB2 AB1	Miss Today	10.00			84	Monday	Irregular

It is then just a case of adding the various details particular to each job in the relevant columns.

Number	Street	Town / Area	County	Post Code	Name	Price	Equipment / Notes	Contact Info	Interval	Preferred Day	Status
↓ ↑ 1	↓ ↑ 2	↓ ↑ 3	↓ ↑		↓ ↑	↓ ↑	↓ ↑		↓ ↑	↓ ↑	↓ ↑
12	The Green	Newtown	Timbuctoo	TB2 AB4	John Smith	12.00			28	Wednesday	New Customer
13	The Green	Newtown	Timbuctoo	TB2 AB4	Mrs. Jones	10.00	Porch not to do		28	Wednesday	New Customer
17	The Green	Newtown	Timbuctoo	TB2 AB4	Tom Harrison	12.00			28	Wednesday	New Customer
7	Mount Drive	Hillside	Timbuctoo	TB2 AB1	Miss Today	10.00			84	Monday	Irregular

This method speeds things up considerably when entering multiple customers.

Note: Some cells (such as **Preferred Day**, **Status** and **Priority** ) have drop down boxes which provide you a choice of what to enter in the cell. In some cases you can only enter data from the choice provided. In other cases such as **Status** you can enter other information (eg. 'one off') but this customer will not be counted on the **Overview** page.

## Sort the Order of Your Work

After entering your customer details you likely wish to put the list in some kind of logical order.

The most frequent order is in order of **Town/Area**, **Street** and **Number** so that work in the same town is grouped together, then street in alphabetical order and the numbers in sequential order.

To put the list in this order click the arrows labelled **1, 2, 3** in that order.

Premises Name	Number	Street	Town / Area	County	Post Code	Name	Price
↓ ↑	↓ ↑ 1	↓ ↑ 2	↓ ↑ 3	↓ ↑		↓ ↑	↓ ↑
▼	▼	▼	▼	▼	▼	▼	▼
	2	Clear View	Barnsley	Timbuctoo	TB2 AB2		8.00
The Bakery	112	High Street	Broadfields	Timbuctoo	TB2 AB2	D. Baker	7.00
The Butchers	114	High Street	Broadfields	Timbuctoo	TB2 AB2	A. Butcher	8.00
Shoe Shop	118	High Street	Broadfields	Timbuctoo	TB2 AB2		7.00
Newsagents	120	High Street	Broadfields	Timbuctoo	TB2 AB2		5.00
Post Office	124	High Street	Broadfields	Timbuctoo	TB2 AB2		7.00
	7	Mount Drive	Hillside	Timbuctoo	TB2 AB1	Miss Today	10.00
Tall Trees	13	Mount Drive	Hillside	Timbuctoo	TB2 AB1		10.00
The Three Taverns	28	Appius Way	Market Place	Chestertown	AC1 TS5	Paul	15.00
	12	The Green	Newtown	Timbuctoo	TB2 AB4	John Smith	12.00
	13	The Green	Newtown	Timbuctoo	TB2 AB4	Mrs. Jones	10.00
	17	The Green	Newtown	Timbuctoo	TB2 AB4	Tom Harrison	12.00
The Grand Hotel	1	The Parade	Newtown	Timbuctoo	TB3 AB3	Accounts Dept	150.00

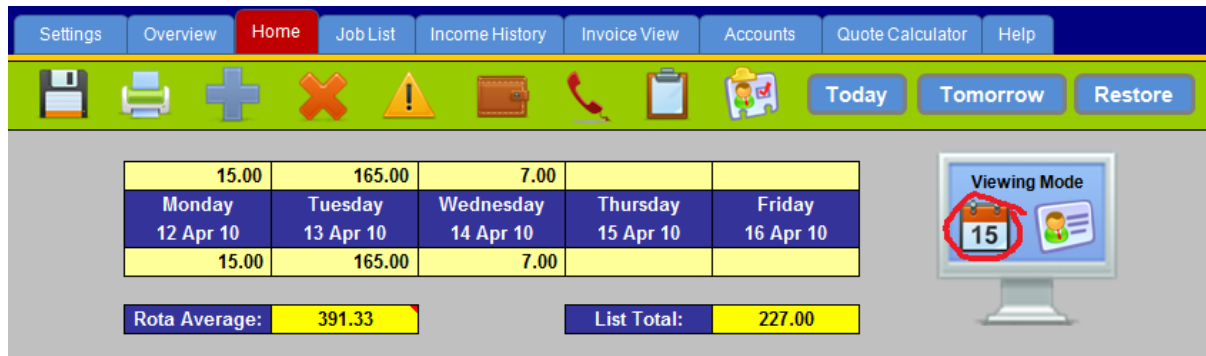
The list now appears in ascending order first by **Town/Area**, then **Street** name, then **Number**.

There are many other sorting arrows shown for ascending or descending order as you see fit and by entering numbers in the Mark/Order column you can create your own sequence as to how you wish the round to appear.

(The **Equipment/Notes**, **Round Name** or **Van No.** column can also be used for this purpose if not in use, depending on which column you find most useful.)

## Scheduling and Forecasting Work

First we need to revert to **Scheduling Mode** to reveal the calendar and schedule related columns.



For RTv4 *PRO* to automatically schedule your work you need to enter the date in the **Last Done** column after each time you complete a job.

You can do this by selecting the date from the drop down list or by typing the date in the format 12/4/10 and Excel will automatically convert this to the format 12 Apr 10. (If entering a date of this year you only need to enter the day and the month and Excel will add the year automatically).

RTv4 *PRO* then calculates the **Next Due** date by adding the number of days stated in the **Interval** column to the **Last Done** date.

We recommend that you enter a multiple of 7 as the interval so that the day on which you cover a particular round is usually the same (as entered in **Preferred Day**)

eg. 14 for fortnightly, 28 for four weekly, 35 for 5 weekly etc.

We find this system helps you to organise your work days better, helping you to prioritise your work and see best where more or better work is needed. (The **Average Rota Values** chart on the **Overview** page is helpful with this.)

When the **Last Done** date has been entered the work will also show on the calendar. The calendar automatically forecasts what work is due according to the date the job was **Last Done** and the amount of days **Interval** between cleans.

Default Start	12 Apr 10									
Override										
197.00	236.00	660.00	158.00	277.00			380.00	508.00	488.00	258.00
Monday 12 Apr 10	Tuesday 13 Apr 10	Wednesday 14 Apr 10	Thursday 15 Apr 10	Friday 16 Apr 10	Saturday 17 Apr 10	Sunday 18 Apr 10	Monday 19 Apr 10	Tuesday 20 Apr 10	Wednesday 21 Apr 10	Thursday 22 Apr 10
		25.00	20.00						40.00	15.00
▼	▼	▼	▼	▼	▼	▼	▼	▼	▼	▼
		5.00								
		7.00								
		5.00							5.00	
									7.00	
									7.00	
									6.00	
									8.00	
			5.00							
		8.00								
			15.00							15.00
									7.00	

You will notice that a 5 day forecast of work coming up is also shown at the top of the screen.

596.00	324.00	430.00	371.00	6.00
Tuesday 09 Feb 10	Wednesday 10 Feb 10	Thursday 11 Feb 10	Friday 12 Feb 10	Saturday 13 Feb 10
539.00	314.00	396.00	335.00	6.00

If the date falls on a day of the week different to that of the **Preferred Day** stated then the work will show in red on the calendar.

Jobs which are marked as **On Hold**, or **Inactive** in the **Status** column do not appear on the calendar and do not show as being **Late** in the **Late** column.

The start date of the calendar is defaulted to start on Today's date. This can be changed by entering a different date in the **Override** cell.

The top row of the calendar shows the total amount of work that is due on this particular day according to the present forecast.

596.00	324.00	430.00	371.00	6.00
Tuesday 09 Feb 10	Wednesday 10 Feb 10	Thursday 11 Feb 10	Friday 12 Feb 10	Saturday 13 Feb 10
539.00	314.00	396.00	335.00	6.00

The bottom row of figures shows a subtotal of work due when a filter is applied. (eg. **Priority A**)

## Re-scheduling Work

From time to time due to bad weather or unforeseen events it is inevitable that work falls out of schedule. If you use intervals which are a multiple of 7 and also enter a preferred day then it is easy to identify work which has fallen out of schedule by referring to the calendar.

The jobs shown in red on the calendar are those which fall on a day different to that stipulated in the **Preferred Day** column.

Another, perhaps easier way of quickly identifying work which has fallen behind is to click the **Late** icon.

Settings

Overview

Home

Job List

Income History

Invoice View

197.00	236.00	635.00	158.00
Monday 12 Apr 10	Tuesday 13 Apr 10	Wednesday 14 Apr 10	Thursday 15 Apr 10
			20.00

Rota Average: 200.00

List Total:

Client ID	Late	Days Late	Re-Schedule	Owe
<div> <div>↓</div> <div>↑</div> </div>		<div> <div>↓</div> <div>↑</div> </div>		
88	Late	4		
341	Late	4		
79	Late	11		
234	Late	4		
335	Late	4		
231	Late	4		
327	Late	4		
328	Late	4		
226	Late	4		
322	Late	11		
72	Late	4		

This performs an automatic filter for all work which is overdue.

**The Days Late** column shows the amount of days that the work is overdue.

To re-schedule this work is simply a matter of entering the desired date in the **Re-Schedule** column.\*

As in the case of the **Last Done** date you can do this by selecting a date from the drop down list or by typing the date in the format 12/4/10 and Excel will automatically covert this to the format 12 Apr 10.

Re-scheduling is helpful in balancing out your work days.

Window cleaning rounds often change as you expand, refine, develop your business. Perhaps after an influx of new work you notice on the calendar totals that you now have too much work to do on the Monday and not enough work on Tuesday.

Using an 'x' in the **Mark/Order** column and then filtering for 'x', you can identify a batch of jobs you wish to re-schedule and then use the **CTRL+C** and **CTRL+V** shortcut to **Copy** and **Paste** the same date in the **Re-Schedule** column for the whole batch of jobs.

*\*Note: The **Re-Schedule** column can also be used to enter dates of appointments. However, for the appointment to show on the calendar and in the **Due Today, Due Tomorrow** list, you must also enter a date in the **Last Done** column. If it is a new job just enter 1/1/1 for the purpose of entering a date.*

## Prioritising Work

If you have more work due in your schedule than you can possibly do then it is a good idea to prioritise your work.

In the column on the **Home** page marked **Priority** you are able to grade your work from **A** , **B**, **C**, **D** or **E**. (**A** being the best, cream work and **E** being the most poor work).

When you wish to narrow down a work list to a manageable size, using this grading system can help.

This system of grading your work is also helpful in refining your round.

By referring to the **Average Rota Values** chart shown above on the **Overview** page you can see where best to concentrate your efforts in replacing poor work with good work, thus refining your round so that your schedule is full of cream work.

## Customer Status

The **Customer Status** column can also be used to weed out **Irregular** customers from your work lists if you wish to concentrate your efforts on jobs which you are sure are definitely to do. (**Irregular** customers are those which often decide to skip the clean upon your arrival. We recommend that you mark these customers as **D** or **E** in the priority column.)

The choice of **Customer Status** is **New Customer**, **Active**, **Irregular**, **One Off**, **On Hold** and **Inactive**.

For the purpose of keeping canvassing records you can also enter **View and Quote**, **Send Written Quote**, **Follow Up Call** and **To Chase**. (By entering **To Do** in the **Mark/Order** column corresponding to the canvassing record status you can then perform a filter for **To Do** to quickly view a list of things you need to do regarding your canvassing campaigns.

You can also enter your own choice of status description but only customers with the status **New Customer**, **Active** or **Irregular** will show up on your calendar as to do or as being **Late** in the Days Late column.

A breakdown of your existing customer base is shown on the **Overview** page.

Customer Base Report			
Status	Customers	4 weekly	Weekly Value
New Customer	33	937.83	234.46
Active	241	5,426.93	1,356.73
Irregular	39	940.68	235.17
<b>Total Value</b>	<b>313</b>	<b>7,305.44</b>	<b>1,826.36</b>
On Hold	56	1,037.45	259.36
Inactive	4	50.00	12.50

## View Debt Lists

To view a list of customers with outstanding debts simply click the  icon.

This debt list shows only the total amounts of debts owing for each customer. To see a more detailed debt list with the various dates of cleans, invoice numbers and individual amounts click the same icon on the **Income History** page.

Rota Average:		478.00		List Total:		340.00	
Client ID	Late	Days Late	Re-Schedule	Owe	Mark / Order	Last Done	
↓↑		↓↑			↓↑	↓↑ Latest	
▼	▼	▼	▼	▼	▼	▼	
82		Not Due	10 Feb 10	7.00	1	14 Apr 10	
161		Not Due	03 Feb 10	30.00	2	07 Apr 10	
332		Not Due	25 Nov 09	120.00	Extra	31 Mar 10	
60		Not Due	25 Jan 10	40.00	1	22 Mar 10	
140		Not Due	25 Jan 10	60.00	2	22 Mar 10	
43		Due Today	12 Feb 10	40.00	1	02 Apr 10	
42		Not Due	15 Jan 10	160.00	1	02 Apr 10	
122		Due Today	12 Feb 10	30.00	2	09 Apr 10	
24	Late	3	23 Mar 10	5.00	1	06 Apr 10	
23		Not Due	13 Apr 10	18.00	1	13 Apr 10	
93		Not Due	16 Feb 10	4.00	2	13 Apr 10	
97	Late	3	16 Mar 10	5.00	2	06 Apr 10	
1		Due Today	12 Feb 10	30.00	1	02 Apr 10	


Figures in the **Owe** column which are red are negative integers which denote that the customer is in credit.



## Create and Print Job Lists

Job lists or work sheets can either be printed directly from the **Home** page (in colour) or from the **Job List** page (in black and white).



In either case simply press the  icon to print the list or press **CTRL+P** to bring up the print options before printing.

A list is created by using filters to narrow down the full list of work to a short list of jobs you wish to print. (See notes on *Performing Filters* in chapter 3)

Some of these filters are automated although you can use the filters in any of the columns which allows incredible flexibility when creating the lists, particularly if you use Microsoft Excel 2007 which allows for multiple filter choices per individual column.

There are various ways to create a list of jobs which you can print as a **Job List**.

### a) Using the calendar

Filter out the non blanks on any given day on the calendar to produce a list of work due that day.

The screenshot shows the 'Filter by Text' dialog box in Microsoft Excel. The dialog is open over a spreadsheet. The 'Filter by Text' tab is selected. The 'Text to filter by' list contains the following values: 5.00, 6.00, 8.00, 10.00, 12.00, 15.00, 20.00, 25.00, 30.00, and Blanks. The 'OK' button is highlighted. The background spreadsheet shows a table with columns for dates (Thursday 15 Apr 10, Friday 16 Apr 10, Saturday 17 Apr 10) and values (158.00, 202.00). The 'Filter by Text' dialog is also showing the 'Filter by Color' and 'Filter by Text' tabs.

	158.00	202.00	
	Thursday 15 Apr 10	Friday 16 Apr 10	Saturday 17 Apr 10
Next Due		202.00	
▼	▼	▼	▼
16 Apr 10		20.00	
16 Apr 10		6.00	
16 Apr 10		8.00	
16 Apr 10		10.00	
16 Apr 10		15.00	
16 Apr 10		12.00	
16 Apr 10		25.00	
16 Apr 10		6.00	
16 Apr 10		10.00	
16 Apr 10		5.00	
02 Apr 10		6.00	
26 Mar 10		6.00	
16 Apr 10		5.00	
16 Apr 10		5.00	
11 Dec 09		10.00	
16 Apr 10		15.00	
16 Apr 10		8.00	
16 Apr 10		30.00	

This method is especially useful if you want to prepare and print the job lists for the whole week or month in advance.


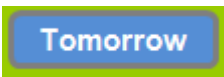
The calendar includes also jobs which are marked **Late**.

Where the price appears in red it means that the **Preferred Day** is different to the day it falls on.

#### **b) Using the Next Due date column.**

Similar to using the calendar, you can filter for any next due date from the list in this column. However, to use this method you should first re-schedule any work marked as **Late** since the next due date for these jobs will show as the original date the job was due.

#### **c). Using the Today and Tomorrow buttons.**

Using the  or  buttons works well if you prepare a job list the evening before using the **Due Tomorrow** feature or on the morning of the work day by using the **Due Today** feature.

This automatic filter performs a non-blank filter on the calendar and temporarily changes the view settings so that the calendar is easily in view together with the customer details.

By changing the date in the **Override** cell you can view the jobs and calendar together for any given future date.


The **Today** and **Tomorrow** filters also include jobs which are marked **Late** which fall on this day.

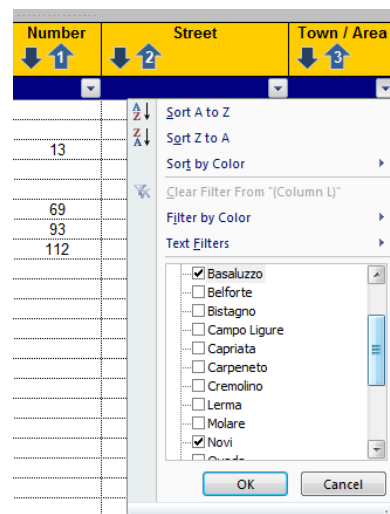
### d) Manual Selection

You can manually select any combination of jobs using the filter tools on any of the columns. (MS Excel 2007 users can perform multiple filters in one column.)

Here is a useful method of manually filtering to produce a work list for today (or tomorrow). Follow the suggested sequence:

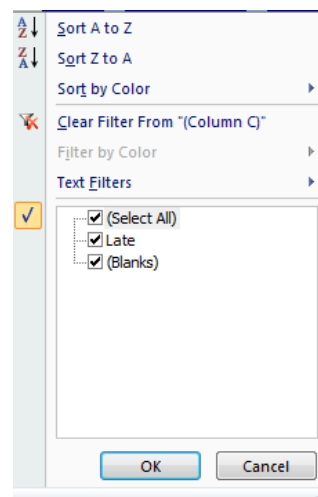
- 1.) Activate a filter to select the area(s) or round you plan to visit.

- 2.) Click the  icon to bring up a list of jobs in these areas which are overdue.



- 3.) Enter today (or tomorrow's) date in the **Re-Schedule** column of the jobs you wish to do in that area. Using the **Copy** and **Paste** function can speed things up here.

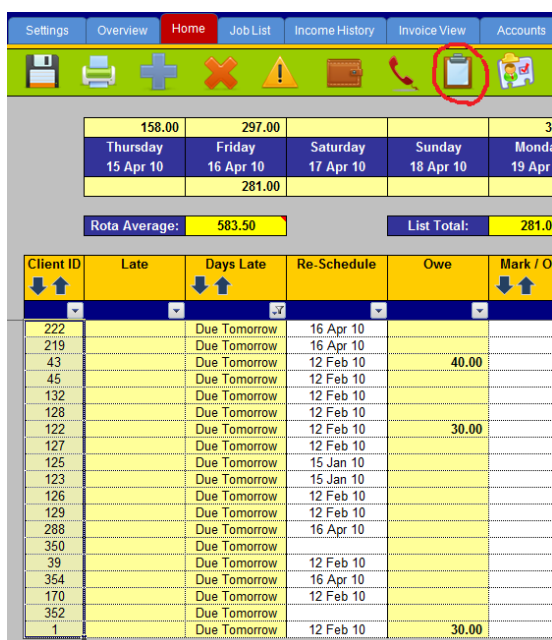
- 4.) Deactivate the filter on the **Late** column by choosing **Select All** in the filter.



- 5.) In the **Days Late** column activate a filter to select **Due Today** (or **Due Tomorrow**).

6.) At this point we now have a list of jobs which are due in the area(s) which we intend to go to. If the list contains more work than it is possible to do in one day then we can narrow the list down further by filtering the **Street** column for work only in certain streets or by using the **Priority** column to select only the best, most reliable work.

7. ) Now we are ready to print the list. There are two styles you can choose from to print a job list. You can either print directly from the **HOME** page or you can send the jobs selected to the **JOB LIST** page and print from there. To select the jobs you would like to send to the **JOB LIST** page you need to highlight the relevant cells in the **CLIENT ID** column as shown below.



Client ID	Late	Days Late	Re-Schedule	Owe	Mark / O
222		Due Tomorrow	16 Apr 10		
219		Due Tomorrow	16 Apr 10		
43		Due Tomorrow	12 Feb 10	40.00	
45		Due Tomorrow	12 Feb 10		
132		Due Tomorrow	12 Feb 10		
128		Due Tomorrow	12 Feb 10		
122		Due Tomorrow	12 Feb 10	30.00	
127		Due Tomorrow	12 Feb 10		
125		Due Tomorrow	15 Jan 10		
123		Due Tomorrow	15 Jan 10		
126		Due Tomorrow	12 Feb 10		
129		Due Tomorrow	12 Feb 10		
288		Due Tomorrow	16 Apr 10		
350		Due Tomorrow			
39		Due Tomorrow	12 Feb 10		
354		Due Tomorrow	16 Apr 10		
170		Due Tomorrow	12 Feb 10		
352		Due Tomorrow			
1		Due Tomorrow	12 Feb 10	30.00	

To highlight the Client ID cells simply drag the mouse over the cells you wish to highlight whilst keeping the left mouse button pressed.

Alternatively, select one cell and then use the shift and cursor keys together to highlight the cells.

Once you have selected the Client ID's you wish to send to the **Job List** page

click the  icon at the top of the screen.

On the **Job List** page, you can assign an order to the jobs and then sort the list, hide or show prices and include a brief notes or instructions on the work list.

If you wish to take the list with you on a smart phone or other portable device and update as you go then you can either copy the job list and paste it directly into an email....

Rota Average: 583.50		List Total: 281.00														
Client ID	Date	Days Late	Re-Schedule	Ours	Mark / Order	Last Done	Promises Name	Number	Street	Town / Area	County	Post Code	Name	Price	Equipment / Notes	Contact Info
222	Due Tomorrow	16 Apr 10				12 Feb 10	E...	21	V.le Unione Europea	Basiglio				60.00		
219	Due Tomorrow	16 Apr 10				09 Oct 09	L...		Via Novi	Basiglio				25.00		
43	Due Tomorrow	12 Feb 10		40.00		02 Apr 10	A...	71	Corso Marengo	Novi				20.00		
45	Due Tomorrow	12 Feb 10				09 Apr 10	N...		Corso Marengo	Novi				6.00		
132	Due Tomorrow	12 Feb 10				09 Apr 10		15	Via Girardengo	Novi				8.00		
128	Due Tomorrow	12 Feb 10				09 Apr 10		36	Via Girardengo	Novi				10.00		
122	Due Tomorrow	12 Feb 10		30.00		09 Apr 10		38	Via Girardengo	Novi				15.00		
127	Due Tomorrow	12 Feb 10				09 Apr 10	C...	44	Via Girardengo	Novi				12.00		
126	Due Tomorrow	15 Jan 10				19 Mar 10		65	Via Girardengo	Novi				25.00		
123	Due Tomorrow	15 Jan 10				02 Apr 10		80	Via Girardengo	Novi				6.00		
126	Due Tomorrow	12 Feb 10				09 Apr 10			Via Girardengo	Novi				10.00		
129	Due Tomorrow	12 Feb 10				09 Apr 10			Via Girardengo	Novi				5.00		
288	Due Tomorrow	16 Apr 10				05 Mar 10			Via Girardengo	Novi				5.00		
350	Due Tomorrow					02 Apr 10			Via Girardengo	Novi				5.00		
39	Due Tomorrow	12 Feb 10				09 Apr 10	L...		Via P. Giacomelli	Novi				5.00		
354	Due Tomorrow	16 Apr 10				12 Mar 10		12	Via Paolo da Novi	Novi				10.00		
170	Due Tomorrow	12 Feb 10				09 Apr 10	U...		Silvano D'Orba	Silvano D'Orba				15.00		
352	Due Tomorrow					09 Apr 10			Silvano D'Orba	Silvano D'Orba				8.00		
1	Due Tomorrow	12 Feb 10		30.00		02 Apr 10	A...	54	Via Onda	Silvano D'Orba				30.00		

or paste the list into a blank Excel worksheet to edit as you go.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1		12 Feb 10	E	71	V.le Unione Europea	Basiglio				60.00							
2		09 Oct 09	L		Via Novi	Basiglio				25.00							
3	40.00	02 Apr 10	A	71	Corso Marengo	Novi				20.00							
4		09 Apr 10	N		Corso Marengo	Novi				6.00							
5		09 Apr 10		15	Via Girardengo	Novi				8.00							
6		09 Apr 10		36	Via Girardengo	Novi				10.00							
7	30.00	09 Apr 10		38	Via Girardengo	Novi				15.00							
8		09 Apr 10		44	Via Girardengo	Novi				12.00							
9		19 Mar 10		65	Via Girardengo	Novi				25.00							
10		02 Apr 10		80	Via Girardengo	Novi				6.00							
11		09 Apr 10			Via Girardengo	Novi				10.00							
12		09 Apr 10			Via Girardengo	Novi				5.00							
13		05 Mar 10			Via Girardengo	Novi				5.00							
14		02 Apr 10			Via Girardengo	Novi				5.00							
15		09 Apr 10	L		Via P. Giacomelli	Novi				5.00							
16		12 Mar 10		12	Via Paolo da Novi	Novi				10.00							
17		09 Apr 10	U		Silvano D'Orba	Silvano D'Orba				15.00							
18		09 Apr 10			Silvano D'Orba	Silvano D'Orba				8.00							
19	30.00	02 Apr 10	A	54	Via Onda	Silvano D'Orba				30.00							
20																	
21																	
22																	
23																	

If your phone uses the Windows Mobile platform then you likely have Pocket Excel installed with which you can use this method.

You may also find these links useful:

Documents to Go, <http://www.dataviz.com/>

Google Docs, <http://www.docs.google.com/>

*Note: Macros are not supported with these programs at this present time so you cannot use the full RTv4 PRO program via the above programs.*

(Visit the dedicated RTv4 PRO support forum for more details.

[www.roundtracker.info](http://www.roundtracker.info) )

## Assign Work to Teams or Individuals

If you have employees then you may wish to assign certain jobs or rounds to individuals, a team or a particular van.

To do this use the **Van** column to label each job assigned and activate this filter when producing **Job Lists** to print or email to your employees.

## Track Advertising and Marketing Efforts

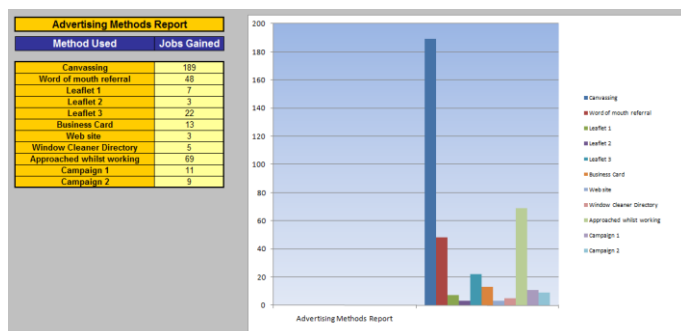
By entering the **Advertising Method Used**, RTv4 *PRO* lets you see at a glance what form of marketing and advertising works best for you.

The **Advertising Method Used** column can be found to the right of the calendar. You may find it easier to activate the **Customer View** mode to enter this information.

Interval	Preferred Day	Status	Priority	Call First	Van No.	Advertising Method Used
14	Wednesday	Active	A			Leaflet 1
14	Wednesday	Active	A			Leaflet 1
14	Wednesday	Active	A			Leaflet 2
7	Wednesday	Active	A			Leaflet 3
365	Wednesday	On Hold	E			Business Card
14	Wednesday	Active	A			Web site
14	Wednesday	Active	A			Window Cleaner Directory
84	Wednesday	On Hold	D			Approached whilst working
14	Wednesday	Active	A			Campaign 1
14	Wednesday	Active	A			Web site
28	Wednesday	Active	A			Web site
56	Wednesday	Irregular	D			Web site
28	Wednesday	Active	A			Leaflet 2
28	Wednesday	Active	A			Leaflet 2
14	Wednesday	Active	B			Leaflet 2
						Canvassing

The **Advertising Method Used** column uses a drop down box for you to select from a list of descriptions which you can preset by using the **Advertising Methods** box on the **Settings** page.


On the **Overview** page a chart is shown with a breakdown of how each advertising method, marketing technique or campaign is performing.



This feature is very helpful in testing your marketing efforts and can help you to fine tune what works best for you.

## Notify Customers of Cleans

Some customers prefer to be contacted beforehand to make an appointment or it may be necessary to remind some customers of your forthcoming visit for arranging access to the property.

By clicking the  icon after creating a job list for a specific day, you can bring up a shortlist of jobs that you need to call. To do this you will need to mark these customers in the **Call First** column by selecting **Yes**.

You may wish to mark certain leads with yes in your canvassing records, such as jobs with the **Status** marked **Follow Up Call** or **To Chase**.

Another method of contacting customers is by email. If you have your customers email address then you can enter the email address in the **Contact Info** column which will automatically become a link when you press enter. Clicking this hyperlink will then automatically open your email client.

You can share information between Microsoft Office products. For more info regarding Mail Merging see *Chapter 8, The More Advanced Stuff*.

## View Various List Totals and Averages

Using the filters you can quickly view the total amounts of various queries.

Rota Average: 478.00			List Total: 340.00			
Client ID	Late	Days Late	Re-Schedule	Owe	Mark / Order	Last Done
82		Not Due	10 Feb 10	7.00	1	14 Apr 10
161		Not Due	03 Feb 10	30.00	2	07 Apr 10
332		Not Due	25 Nov 09	120.00	Extra	31 Mar 10
60		Not Due	25 Jan 10	40.00	1	22 Mar 10
140		Not Due	25 Jan 10	60.00	2	22 Mar 10
43		Due Today	12 Feb 10	40.00	1	02 Apr 10
42		Not Due	15 Jan 10	160.00	1	02 Apr 10
122		Due Today	12 Feb 10	30.00	2	09 Apr 10
24	Late	3	23 Mar 10	5.00	1	06 Apr 10
23		Not Due	13 Apr 10	18.00	1	13 Apr 10
93		Not Due	16 Feb 10	4.00	2	13 Apr 10
97	Late	3	16 Mar 10	5.00	2	06 Apr 10
1		Due Today	12 Feb 10	30.00	1	02 Apr 10

For example when you filter a debt list such as shown earlier, you will notice that at the top of the list there is a **List Total** shown as well as **Rota Average**

This feature is useful for many queries such as the total amount and average amount in any given area, street or how much has been assigned to a particular team or individual in the **Van** column. This is obviously helpful when dividing the total round into days, areas or smaller rounds.

The **Rota Average** figure varies according to the rota frequency you set on the **Overview** page.


Settings	Overview	Home	Job List	Income History	Invoice View	Accounts	Quote Calculator	Help
Today's Date: 16 Apr 10								
Rota Frequency:	4 weekly	Average Rota Values (select Rota Frequency)						
Priority	Weekly Fortnightly 4 weekly Monthly 5 weekly 6 weekly	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Misc. Total
Cream work		603.50	1,113.33	1,319.27	591.00	935.00		4,562.10
Good		191.00	389.67	219.00	200.00	199.50		1,199.17
OK	C	91.83	128.67	169.00	180.00	32.00		601.50
Poor	D	171.00	45.33	159.80	367.81	198.74		942.68
Very Poor	E							
Totals		1,057.33	1,677.00	1,867.07	1,338.81	1,365.24		7,305.44
Total A,B,C Priority Work								6,362.76

You can set the **Rota Frequency** to **Weekly**, **Fortnightly**, **4 Weekly**, **Monthly**, **5 Weekly** or **6 Weekly**.



## Send Work Completed to Income History

Once you have updated all the jobs done for the day, click the



button to clear any active filters and then click the **Latest** button in the **Last Done** column header.



This will automatically produce a short list of jobs done on the most recent date in the list.

At this point we can send the list of work done automatically to **Income History** and record whether the customer paid or not - and if so - the **Payment Method** and the **Account Paid Into**.

The sending of this list of jobs done to **Income History** is similar to the method used above for sending a list to the **Job List** page.

As before, you need to highlight the **Client ID** cells in the list.....

Client ID	Late	Days Late	Re-Schedule	Owe	Mark / Order	Last Done	Premises Name	Number	Street	Town / Area
82		Not Due	10 Feb 10	7.00	1	14 Apr 10	Corso Bagni	93	Corso Bagni	Acqui Terme
77		Not Due	10 Feb 10		1	14 Apr 10	Corso Bagni		Corso Bagni	Acqui Terme
87		Not Due	10 Feb 10		1	14 Apr 10	Corso Bagni		Corso Bagni	Acqui Terme
88		Not Due	14 Apr 10		1	14 Apr 10	Corso Bagni		Corso Bagni	Acqui Terme
89		Not Due	10 Feb 10		1	14 Apr 10	Corso Bagni		Corso Bagni	Acqui Terme
78		Not Due	14 Apr 10		1	14 Apr 10	Corso Bagni		Corso Bagni	Acqui Terme
79		Not Due	14 Apr 10		1	14 Apr 10	Corso Bagni		Corso Bagni	Acqui Terme
238		Not Due	24 Mar 10		3	14 Apr 10	Corso Italia		Corso Italia	Acqui Terme
232		Not Due	10 Feb 10		3	14 Apr 10	Corso Italia		Corso Italia	Acqui Terme
235		Not Due	10 Feb 10		3	14 Apr 10	Corso Italia		Corso Italia	Acqui Terme
237		Not Due	10 Feb 10	35.00	3	14 Apr 10	Corso Italia		Corso Italia	Acqui Terme
231		Not Due	14 Apr 10		3	14 Apr 10	Corso Italia		Corso Italia	Acqui Terme
239		Not Due	24 Mar 10		3	14 Apr 10	Corso Italia		Corso Italia	Acqui Terme



and then this time click the icon.

This will then open automatically the **Income History** page which we will talk about now.....

## Chapter 5

# INCOME HISTORY

### **Things you can do on the Income History page:**

- See which jobs have paid or are owing
- Mark outstanding amounts as paid or partly paid.
- Enter a pre-paid amount
- Show payment method
- Enter job history notes
- Change service description
- View overdue invoices
- Create and print multiple invoices and envelopes
- Create single invoices in PDF format
- Create and print a debt list
- Send paid invoices to accounts page
- View income total over a given period

## Mark Jobs as Paid or Partly Paid

Once you have sent the list of work done across to the **Income History** page you can then mark which of these jobs have paid, how they paid and into which account you have put the payment.

To show that a customer has paid you simply enter the date into the **Date Paid** column. Leaving the **Date Paid** column blank will display the job as **Outstanding**.

You can select a date from the drop down list or enter the date manually. The **Ctrl+C** and **Ctrl+V** short cuts can help speed things up by copying the date entered in the first cell and then pasting it into the other relevant cells.

The amount paid may be different to the standard amount shown on the **Home** page in which case you can change the amount of the invoice generated on the **Income History** page by changing the figure in the **Price** column.

If only part of the full outstanding amount has been paid then leave the **Date Paid** column blank and enter the amount paid in the **Part Paid** column. The outstanding amount will then show as the difference between the amount paid and the full invoice amount. Use the **Job History** notes to indicate the date this amount was paid. When the full amount had been paid enter the **Date Paid** as normal and delete the **Part Paid** amount.

Total Income 7,417.00 7,417.00 Latest												
Invoice ID	Client ID	Date	Price	VAT	Total inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account	Outstanding	Late
495	138	19 Apr 10	45.00		45.00	19 Apr 10			Cash	Money Handled		
494	66	19 Apr 10	20.00		20.00				Cash	Money Handled	20.00	
493	65	19 Apr 10	7.00		7.00	19 Apr 10			Cash	Money Handled		
492	64	19 Apr 10	15.00		15.00	19 Apr 10			Cash	Money Handled		
491	63	19 Apr 10	10.00		10.00	19 Apr 10			Cash	Money Handled		
490	61	19 Apr 10	20.00		20.00	19 Apr 10			Cash	Money Handled		
489	60	19 Apr 10	20.00		20.00	19 Apr 10			Cash	Money Handled		
488	318	19 Apr 10	100.00		100.00		80.00	£80 paid 19/04/10	Cash	Money Handled	20.00	
487	393	19 Apr 10	30.00		30.00	19 Apr 10			Cash	Money Handled		
486	394	19 Apr 10	15.00		15.00	19 Apr 10			Cash	Money Handled		
485	1	16 Apr 10	15.00		15.00	16 Apr 10			Cash	Money Handled		

Pre-paid amounts would be entered in the **Part Paid** column *but the Date Paid column must be left blank* until this amount has been cleared as each corresponding job is completed. (If a date is entered, the pre-paid amount will not show on the Home Page.)

Total Income		7,417.00	7,417.00		Latest							
Invoice ID	Client ID	Date	Price	VAT	Total inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account	Outstanding	Late
500	62	19 Apr 10	5.00		5.00	19 Apr 10			Cash	Money Handled		
499	67	19 Apr 10	10.00		10.00		40.00		Cash	Money Handled	- 30.00	
498	141	19 Apr 10	45.00		45.00	19 Apr 10			Cash	Money Handled		
497	140	19 Apr 10	20.00		20.00				Cash	Money Handled	20.00	
496	139	19 Apr 10	45.00		45.00	19 Apr 10			Cash	Money Handled		

The example above shows that on the 19<sup>th</sup> April a customer paid £40 which covers one clean at £10 and pre-pays for 3 further cleans. The figure outstanding is therefore minus £30.00 which shows on the **Home** page as a in red.

Rota Average:		322.50		List Total:		390.00	
Client ID	Late	Days Late	Re-Schedule	Owe	Mark / Order	Last Done	
↓↑		↓↑			↓↑	↓↑ Latest	
▼	▼	▼	▼	▼	▼	▼	
138		Not Due	25 Jan 10			19 Apr 10	
139		Not Due	25 Jan 10			19 Apr 10	
140		Not Due	25 Jan 10	80.00		19 Apr 10	
141		Not Due	25 Jan 10			19 Apr 10	
67		Not Due	25 Jan 10	- 30.00		19 Apr 10	
62		Not Due	25 Jan 10			19 Apr 10	

To update future cleans in credit you should continue to leave the **Date Paid** blank so that each visit in credit off-sets the amount shown in the **Owe** column on the **Home** page.

Once the credit balance is cleared the **Date Paid** can be entered in each invoice record as the date the original credit amount was paid.

## Show Payment Method

In the **Payment Method** column you can enter how the job was paid for, whether it was by **BACS**, **Cash**, **Cheque**, **Direct Debit**, **PayPal**, **Postal Order**, **Standing Order**, **Transfer** or by **Other** means. You can select one of these methods from the drop down box or enter your own manually. The default method is cash. (You can personalise these methods on the **Settings** page).

You can also show which account the money is paid into by selecting an account from the drop down list in the column **Into Account**. The accounts can be named on the **Settings** page (apart from the **Money Handled** account which is the money which literally passes through your hands). These accounts also are shown on the **Accounts** page.

**Cash** and **Cheque** payments should be shown as being paid into the **Money Handled** column.

A **BACS** payment, a **Standing Order** or **Direct Debit** payment would be shown as being paid into the relevant bank account.

## Enter Job History Notes

Further notes regarding the payment can be made in the **Job History Notes** column. (eg. First clean, Including Fascias, etc.) The columns will automatically adjust in width as more invoices are added.

## Change the Service Description

You can also change the **Service Description** shown on the invoice to describe the services rendered on each invoice. (Eg. *Window Cleaning Services* or *Gutter Cleaning Services*.) These can be changed on the **Settings** page.

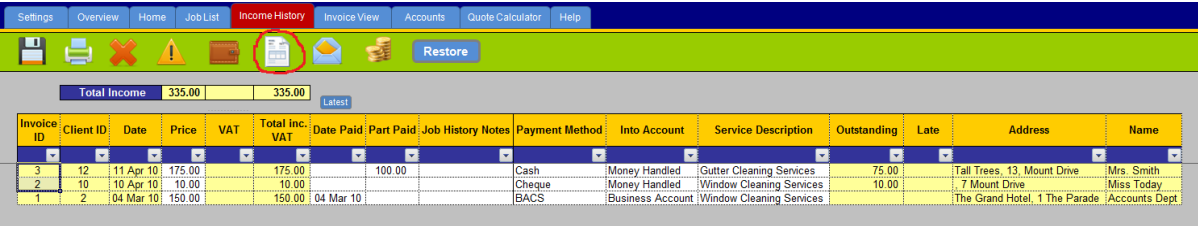
## Create and Print Invoices and Envelopes

Invoice numbers are generated automatically as you transfer the work done across to the **Income History** page from the **Home** page. The **Price** column will show the standard amount per clean so change this if necessary before printing the invoice.

You can print batches of invoices together if printing hard (paper) copies.

If you need to add other details particular to one job then you will need to print the invoice individually. Be sure to delete the details from the invoice template before printing other invoices.

To select the invoice(s) you wish to print select the relevant **Invoice ID** number(s) and click the **Create Invoice** button.



Invoice ID	Client ID	Date	Price	VAT	Total Inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account	Service Description	Outstanding	Late	Address	Name
3	12	11 Apr 10	175.00		175.00		100.00		Cash	Money Handled	Gutter Cleaning Services	75.00		Tall Trees, 13, Mount Drive	Mrs. Smith
2	10	10 Apr 10	10.00		10.00				Cheque	Money Handled	Window Cleaning Services	10.00		7 Mount Drive	Miss Today
1	2	04 Mar 10	150.00		150.00	04 Mar 10			BACS	Business Account	Window Cleaning Services			The Grand Hotel, 1 The Parade	Accounts Dept

Whilst the same range of cells is selected click the envelope icon to print the matching envelopes.

## Create Invoices in PDF format

You may wish to send an invoice as an email attachment. Or perhaps you would like to keep a copy of each invoice as a file on your computer. In either of these cases then publishing the invoice as a PDF file is the answer\*.

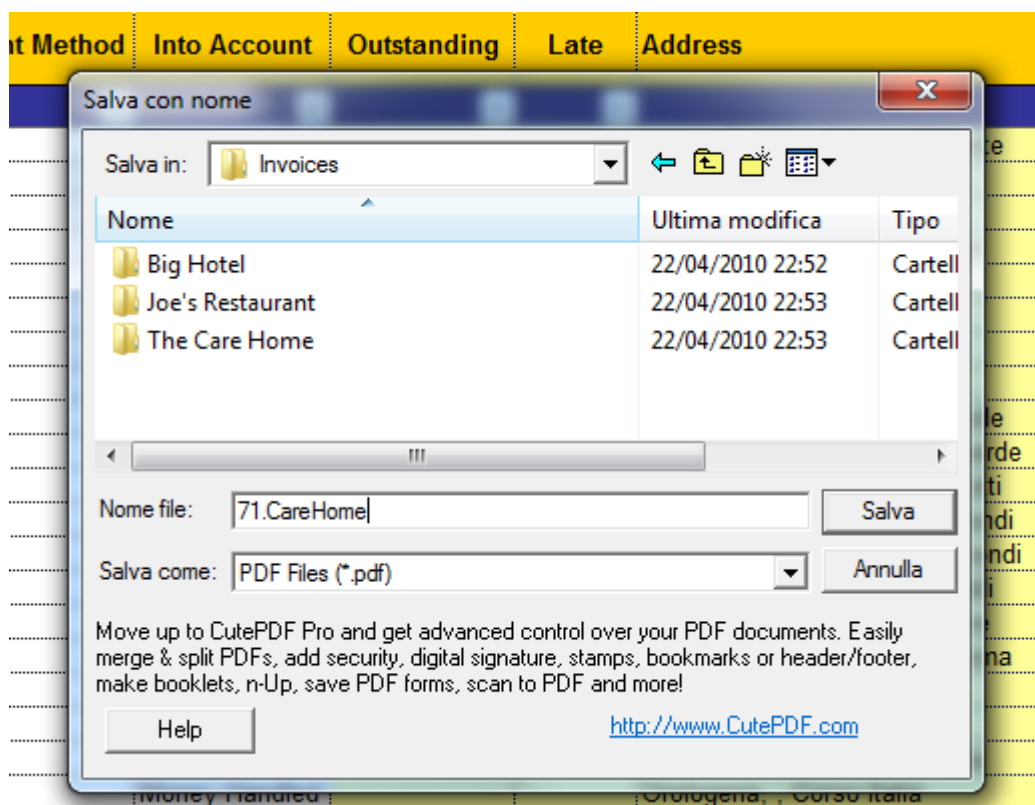
To do this you install a PDF writer. We recommend **CutePDF** which is a free PDF writer which you can download here:

<http://www.cutepdf.com/products/cutepdf/Writer.asp>

and if you don't already have a PDF reader then you will also need:

<http://get.adobe.com/uk/reader/> (which is also free).

CutePDF will install itself as a printer so when you want to print an invoice as a PDF file you need to first go to your printer settings in control panel. Set CutePDF as the default printer. When you print using CutePDF, you will be prompted to save the file with a dialog box like this:



Select the folder you wish to save the invoice to and name the file.

The invoice file can then be attached to an email to send to your customer.

*\*Note: You need to produce invoices individually as PDF files.*









## View Overdue Invoices

Where an invoice is recorded as being unpaid and the **Payment Terms** period has expired, the invoice will show as being **Late**.

The amount of days for the invoice **Payment Terms** can be pre-set on the **Settings** page.

Click the **Late** icon to display a short list of invoices overdue.

SettingsOverviewHomeJob ListIncome HistoryInvoice ViewAccountsQuote CalculatorHelp



Restore

Total Income205.00205.00Latest

Invoice ID	Client ID	Date	Price	VAT	Total inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account	Outstanding	Late	Ad
199	97	23 Mar 10	5.00		5.00				Cash	Money Handled	5.00	LATE	Pa
186	140	22 Mar 10	60.00		60.00				Cash	Money Handled	60.00	LATE	Piz
69	43	12 Mar 10	20.00		20.00				Cash	Money Handled	20.00	LATE	Ab
3	42	15 Jan 10	120.00		120.00				Cash	Money Handled	120.00	LATE	Ag



## Create and Print a Debt List

A full list of outstanding payments can be quickly created by clicking the **Debts** icon.

Invoice ID	Client ID	Date	Price	VAT	Total Inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account	Outstanding	Late	A
429	23	13 Apr 10	18.00		18.00				Cash	Money Handled	18.00		G
372	24	06 Apr 10	5.00		5.00				Cash	Money Handled	5.00		In
317	42	02 Apr 10	40.00		40.00				Cash	Money Handled	40.00		A
3	42	15 Jan 10	120.00		120.00				Cash	Money Handled	120.00	LATE	A
474	43	16 Apr 10	20.00		20.00				Cash	Money Handled	20.00		A
315	43	02 Apr 10	20.00		20.00				Cash	Money Handled	20.00		A
69	43	12 Mar 10	20.00		20.00				Cash	Money Handled	20.00	LATE	A
334	82	07 Apr 10	7.00		7.00				Cash	Money Handled	7.00		Ti
439	93	13 Apr 10	4.00		4.00				Cash	Money Handled	4.00		II
199	97	23 Mar 10	5.00		5.00				Cash	Money Handled	5.00	LATE	P
478	122	16 Apr 10	15.00		15.00				Cash	Money Handled	15.00		G
394	122	09 Apr 10	15.00		15.00				Cash	Money Handled	15.00		G
322	122	02 Apr 10	15.00		15.00				Cash	Money Handled	15.00		G
497	140	19 Apr 10	20.00		20.00				Cash	Money Handled	20.00		P
186	140	22 Mar 10	60.00		60.00				Cash	Money Handled	60.00	LATE	P
345	161	07 Apr 10	30.00		30.00				Cash	Money Handled	30.00		C
455	237	14 Apr 10	35.00		35.00				Cash	Money Handled	35.00		B
302	332	31 Mar 10	120.00		120.00				Cash	Money Handled	120.00		B

If you are going out collecting then we recommend you print a debt list from the **Income History** page rather than from the **Home** page. The **Home** page displays the full outstanding amount whereas the **Income History** debt list groups individual outstanding payments together from the same customers so that you can see the dates of each visit outstanding.

In either case click the **Print** icon or press **Ctrl+P** to print.

## Mark a Previously Outstanding Debt as Paid

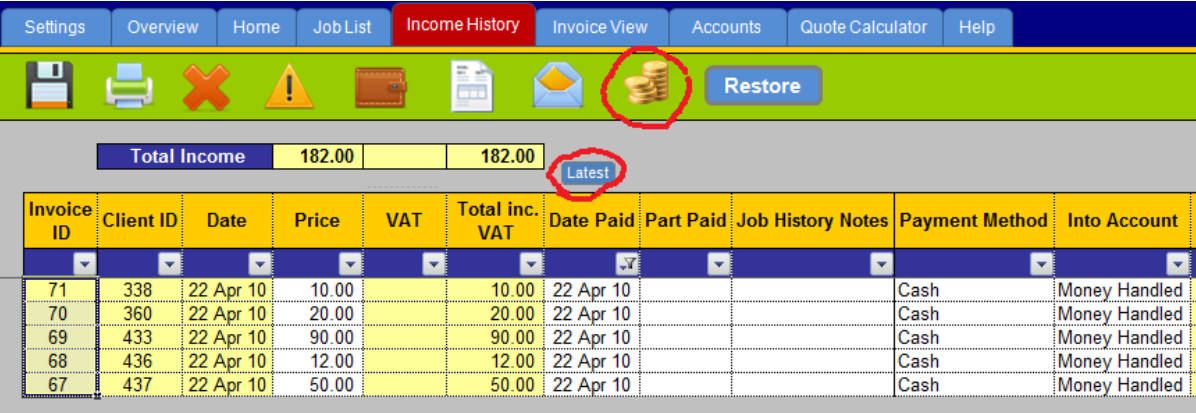
Let's say you don't receive payment from a customer for one clean but on the following clean you receive payment for both cleans. To mark the previous outstanding payment as clean you need to locate it in your **Income History**. To do this click on the **Debts** icon which looks like a wallet as shown above. If your list of outstanding payments is quite long then you can use the filter tool to filter for the **Client ID**.

The debt can be marked as paid by entering the date the payment was received.

## Send Paid Invoices to Accounts Page

Whereas the **Income History** page is helpful to see how much work you complete per day, month or year etc, the **Accounts** page is a good way of recording your income as you actually receive the money.

To send records of your takings automatically to the **Accounts** page first enter the date received and other relevant information as already described above. Then click the **Latest** button to bring up a shortlist of payments received on the most recent date.



The screenshot shows the 'Income History' page with the following data:

Invoice ID	Client ID	Date	Price	VAT	Total inc. VAT	Date Paid	Part Paid	Job History Notes	Payment Method	Into Account
71	338	22 Apr 10	10.00		10.00	22 Apr 10			Cash	Money Handled
70	360	22 Apr 10	20.00		20.00	22 Apr 10			Cash	Money Handled
69	433	22 Apr 10	90.00		90.00	22 Apr 10			Cash	Money Handled
68	436	22 Apr 10	12.00		12.00	22 Apr 10			Cash	Money Handled
67	437	22 Apr 10	50.00		50.00	22 Apr 10			Cash	Money Handled

The relevant **Invoice ID** numbers are then selected before clicking on the **Send to Accounts** icon.

## View Income Total Over a Given Period

You can easily view your income total (whether money received or total work completed) over any given period.

Invoice ID	Client ID	Date	Price	VAT	Total inc. VAT	Date Paid	Part P
500	62	19 Apr 10					
499	67	19 Apr 10					
498	141	19 Apr 10					
497	140	19 Apr 10					
496	139	19 Apr 10					
495	138	19 Apr 10					
494	66	19 Apr 10					
493	65	19 Apr 10					
492	64	19 Apr 10					
491	63	19 Apr 10					
490	61	19 Apr 10					
489	60	19 Apr 10					
488	318	19 Apr 10					
487	393	19 Apr 10					
486	394	19 Apr 10					
485	1	16 Apr 10					
484	354	16 Apr 10					
483	39	16 Apr 10					
482	129	16 Apr 10					
481	126	16 Apr 10					
480	123	16 Apr 10					
479	127	16 Apr 10	12.00		12.00	16 Apr 10	
478	122	16 Apr 10	15.00		15.00	16 Apr 10	
477	128	16 Apr 10	10.00		10.00	16 Apr 10	

Depending on which version of Excel you use, you can either filter for the dates as shown here. (Be it by day, month or year).

Once filtered the **Total Income** amount is shown at the top of the screen.

(Version shown is Excel 2007)

Alternatively, you can exit **Full Screen** mode (Click **View, Full Screen** in Excel 2003) and then select the range of cells in the **Price** column for the period you are interested in.

You will then see that the total amount in the range of cells is shown at the bottom of the screen.

487	393	19 Apr 10	30.00		30.00	19 Apr 10
486	394	19 Apr 10	15.00		15.00	19 Apr 10
485	1	16 Apr 10	15.00		15.00	16 Apr 10
484	354	16 Apr 10	10.00		10.00	16 Apr 10
483	39	16 Apr 10	5.00		5.00	16 Apr 10
482	129	16 Apr 10	5.00		5.00	16 Apr 10
481	126	16 Apr 10	10.00		10.00	16 Apr 10
480	123	16 Apr 10	6.00		6.00	16 Apr 10
479	127	16 Apr 10	12.00		12.00	16 Apr 10
478	122	16 Apr 10	15.00		15.00	16 Apr 10
477	128	16 Apr 10	10.00		10.00	16 Apr 10
476	132	16 Apr 10	8.00		8.00	16 Apr 10
475	45	16 Apr 10	6.00		6.00	16 Apr 10
474	43	16 Apr 10	20.00		20.00	16 Apr 10
473	252	15 Apr 10	60.00		60.00	15 Apr 10
472	51	15 Apr 10	6.00		6.00	15 Apr 10

Average: 10.17 Count: 12 Sum: 122.00

## Chapter 6

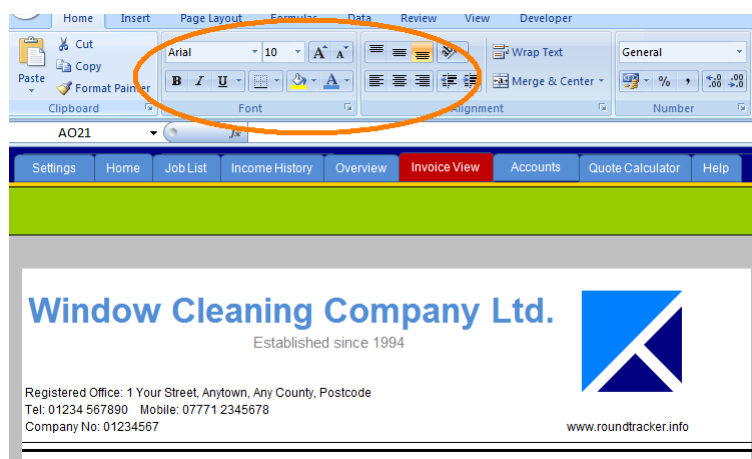
# INVOICE VIEW

### Things you can do on the Invoice View page

- Format the text and layout of the invoice header
- Add your own logos or invoice header
- Change currency format

## Format the Text and Layout of the Invoice Header

As we have seen in the first chapter, you can use the **Settings** page to enter your business details. On the **Invoice View** page you can then change the formatting of the invoice header text.



Pressing the **Escape** key allows you to leave full screen mode\*. A range of formatting tools will appear. You can use these to format the text colour, size and style etc. You can also add your own logo (covering the whole header section if you wish) or add one of the logos included.

\*In Excel 2003, click **View** and then **Full Screen**

Return to Full View mode by selecting **View** then **Full Screen** from the Excel toolbar at the top of the page.

## Add Your Own Logos or Invoice Header

A few copyright free logos are included on the **Invoice Page** for you to use as in the image above. Simply drag the image to the desired position on the invoice header.

However, to really make Round Tracker v4 *PRO* your own you can personalise the invoice header with your own logo. You could even create an image which covers the header and sets out your details as you wish.

This service requires the unlocking of the protection of the Invoice View file and hence is part of the '*Tweak my Round Tracker*' service. (To access this service you must first join the dedicated support forum at [www.roundtracker.info](http://www.roundtracker.info) )

To add your own logo(s) costs **£5.00**.

You will need to send a copy of your file to us along with your logo or header files in gif, jpeg or bitmap format and we will add then to the logo selection for you to use. You will receive your file back with the logos within 48 hours.

**Step 1.**

Pay for the service by following this link:

[https://www.paypal.com/cgi-bin/webscr?cmd=\\_s-xclick&hosted\\_button\\_id=FEZHR99A75DAA](https://www.paypal.com/cgi-bin/webscr?cmd=_s-xclick&hosted_button_id=FEZHR99A75DAA)

**Step 2.**

Send us your Round Tracker file (or request a new file) along with your logo files to [roundtracker@windowcleaningresources.co.uk](mailto:roundtracker@windowcleaningresources.co.uk) using the same email address as your PayPal email or the transaction ID provided by PayPal.

## **Change Currency Format etc.**

Some parts of the invoice layout are unprotected allowing you to change the description titles and currency format.

## Chapter 7

# ACCOUNTS

### Things you can do on the Accounts page (and Settings page)

- Name your accounts
- Create transaction descriptions
- Add expenses
- Delete accounts entry
- Enter invoices paid from **Income History**
- Make a deposit
- Transfer money between accounts
- Sort accounts by date
- Reconcile accounts with your bank statement
- Print your accounts
- Archiving your accounts

## Before Using the Accounts Page

Before using the **Accounts** page you should first set up the **Settings** page correctly to suit your business needs.

### Name Your Accounts

There are 5 accounts on the **Accounts** page. You can name 4 of these on the **Settings** page. **Money Handled** as mentioned earlier cannot be changed. This refers to the money which literally passes through your hands before it is deposited or spent. This would include cash and cheques.

	Account Name
Account 1	Money Handled
Account 2	Abbey Business
Account 3	Business Savings
Account 4	PayPal account
Account 5	Personal Account

(Left: Settings page)

(Below: Accounts page)

Starting Balances			500.00								
Ending Balances			475.00								
Total	150.00	150.00	150.00	175.00							
Subtotal	150.00	150.00	150.00	175.00							
	Account 1		Account 2		Account 3		Account 4		Account 5		
	Money Handled		Abbey Business		Business Savings		PayPal account		Personal Account		
Transaction Description	In	Out	In	Out	In	Out	In	Out	In	Out	
Deposit			150.00								
Deposit		150.00									
Accountant				175.00							
Sales	150.00										

Before first use, enter the **Starting Balance** for each account in the top row.



## Create Transaction Descriptions

The **Transaction Descriptions** identify the various transactions which appear on your accounts. As well as speeding things up when using the **Accounts** page, these descriptions allow you to quickly find transactions using the filters. A breakdown of values relating to each **Transaction Description** is shown on the **Overview** page.

**Note:** Changing these descriptions once used will obviously effect the accuracy and reliability of this chart. Once you have used a transaction description do not change them.

We have already entered a list of suggested **Transaction Descriptions** for you. (The first three in yellow cannot be changed).

Transaction Descriptions	
INCOME	Transfer
	Deposit
	Sales
	Interest Received
	Tips
	Other income
EXPENDITURE	Accountant
	Advertising
	Access Hire
	Bank Charges
	Parking Fees
	Equipment
	Gross Interest
	Goodwill
	Insurance
	Fuel
	Legal Fees
	Materials
	Motor Maintenance
	Net Interest
	National Insurance
	Rent of Office
	Subcontractor
	Stationery
	Sundries
	Tax
	Telephone/Internet
	Training
	Employee Wages
	Other


## Suppliers and Beneficiaries

Your regular suppliers and beneficiaries can also be described on the **Settings** page for quick selection using the drop box in the **Supplier** column of the **Accounts** page.

				Sales	Expenses		
Date	Invoice ID	Invoice Date	Notes	Client	Supplier / Beneficiary	Payment Method	Transaction Description
05 Mar 10					eg. My Accountant Name		Please select description
05 Mar 10					Supplier name 1		Deposit
04 Mar 10			Inv. 5301		Supplier name 2		Deposit
04 Mar 10	1	04 Mar 10		The Grand Hotel, 1 The Parade	Supplier name 3	BACS	Accountant
					Supplier name 4		Sales
					Employee name 1		
					Employee name 2		

## Add Expenses



To add an expense click the  icon on the **Accounts** page and enter the number of rows you wish to add.

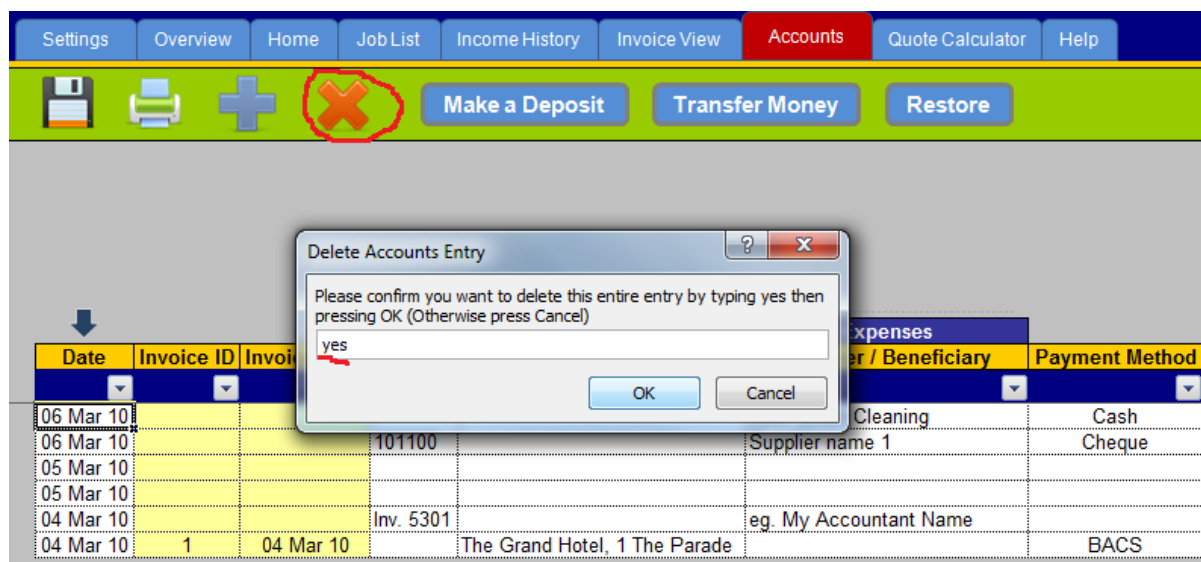
Then you can enter the date of the expense, in the date column and use the **Supplier/Beneficiary** drop down box to select a beneficiary or write a different one if you wish. You may also wish to add Notes and Payment Method (eg. perhaps **Cheque** and the cheque number in the **Notes** column.)

The expense amount would then be entered manually in the relevant **Account Out** column. (eg. if paying by cheque from your Business Account you would enter the figure in the **Business Account Out** column. If using cash it would be entered in the **Money Handled Out** column. See fig. below:)

				Sales	Expenses			Account 1		Account 2	
Date	Invoice ID	Invoice Date	Notes	Client	Supplier / Beneficiary	Payment Method	Transaction Description	Money Handled In	Money Handled Out	Abbey Business In	Abbey Business Out
06 Mar 10					John Smith Cleaning	Cash	Subcontractor		80.00		
06 Mar 10			101100		Supplier name 1	Cheque	Materials				25.00

## Delete Accounts Entry

To delete an accounts entry select an individual cell in the **Date** column of the row you wish to delete, click the delete icon and confirm the deletion by writing 'yes' in the dialog box.



## Enter Invoices Paid from Income History

Your income is sent to the **Accounts** page from the **Income History** page. Usually this would only include the jobs that have paid. (See Chapter 5, page 41)

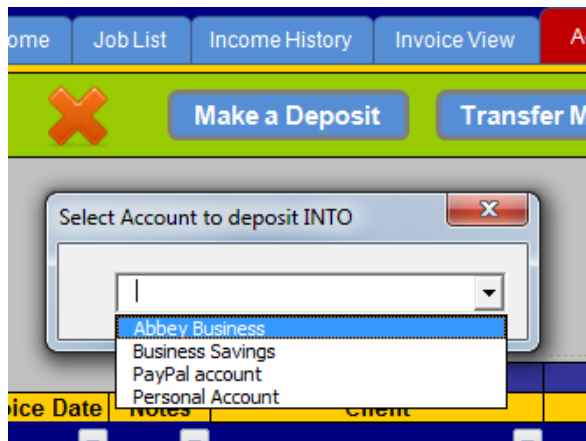
**Once transferred you should mark these as Sales in the Transaction Description column.**

							Account 1	
				Sales	Expenses	Payment Method	Money Handled	
Date	Invoice ID	Invoice Date	Notes	Client	Supplier / Beneficiary		In	Out
	5	02 Mar 10		The Bakery, 112 High Street		Cash	Please select description	7.00
	6	02 Mar 10		The Butchers, 114 High Street		Cash	Please select description	8.00
	7	02 Mar 10		Shoe Shop, 118 High Street		Cash	Transfer	7.00
	8	03 Mar 10		Newsagents, 120 High Street		Cash	Deposit	5.00
	9	03 Mar 10		Post Office, 124 High Street		Cash	Sales	7.00
							Interest Received	

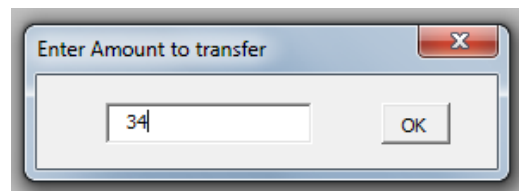
Use **Copy** and **Paste** to change multiple transaction descriptions to 'Sales'.

## Make a Deposit

Cash and cheques would be shown as entering the **Money Handled** account. To show this money being deposited into another account click the **Make a a Deposit** icon and select the account you wish to deposit into from the drop down list in the dialog box.



Then enter the amount you wish to deposit.



## Transfer Money Between Accounts

Transferring money between accounts follows exactly the same procedure as a deposit. The difference being that you will be asked to state which account the money is coming from whereas a deposit is always from the **Money Handled** account.

## Sort your Accounts by Date

Let's say you may wish to enter all your expenses in one go at the end of the week. Each day you have sent the information of who has paid from **Income History** to **Accounts**. The dates of the expenses would therefore not appear in chronological order. Or perhaps there are transactions which appear on your bank statement which you will enter manually when your statement arrives.

In both these cases it is useful to sort the accounts into order using the sort

arrow above the **Date** column.



## Reconcile Accounts with your Bank Statement

If used correctly the **Accounts** page can be compared with your bank statements and any discrepancies can be spotted.

To be able to do this you need to enter or account for all transactions entries that appear on your bank statement in your **Accounts**.

(Obviously the individual jobs which show in your accounting records will appear on your statement as just one deposit. )

You must enter a correct **Starting Balance** in each account as it appears on your statement.

The ending balance figure then allows you to compare your bank statement for the same period to spot anything which you may have forgotten to include.

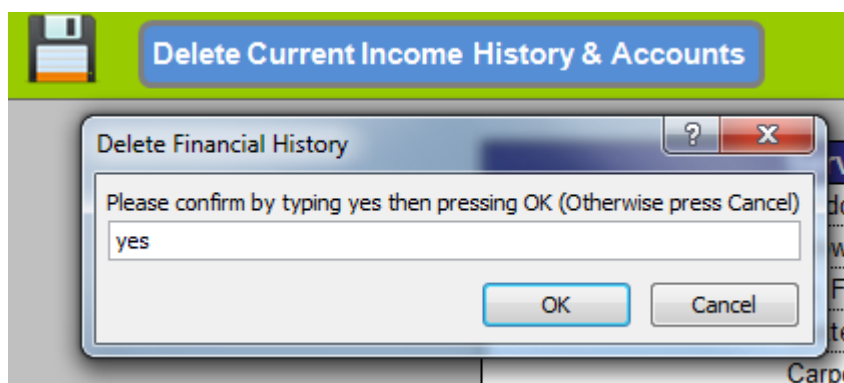
## Print your Accounts

To print your accounts simply press the **Print** icon. Remember that you can print the accounts as a PDF file using Cute PDF or similar.

## Archiving your Accounts

At the end of your financial year you may wish to start a new file and archive your last file. (This also prevents the file size from growing ever larger!)

1. First click **Escape** (or **View, Full Screen**) then **File, Save As** and then name the file and select the destination folder.
2. Close this file and re-open the same file you have just saved to check that the back up worked correctly and your work is saved.
3. Now close this file again and open the file that you were currently using.
4. On the **Settings** page click the **Delete Current Income History & Accounts**. You will need to confirm this twice by typing yes in confirmation that you have created the backup file.



The file will keep all your customer info but delete all of your **Accounts** and **Income History** page info.

It would be a good idea to print a debt list from your original file and filter for these customers. Enter these debts into the new file by selecting the **Client ID** from the Home page after entering the corresponding **Last Done** date. You can then change the amount owing in the **Price** column on **Income History** if necessary. You will need to update both files until these debts are cleared, so it may be worth noting this in the **Notes** column of **Income History**.

## Chapter 8

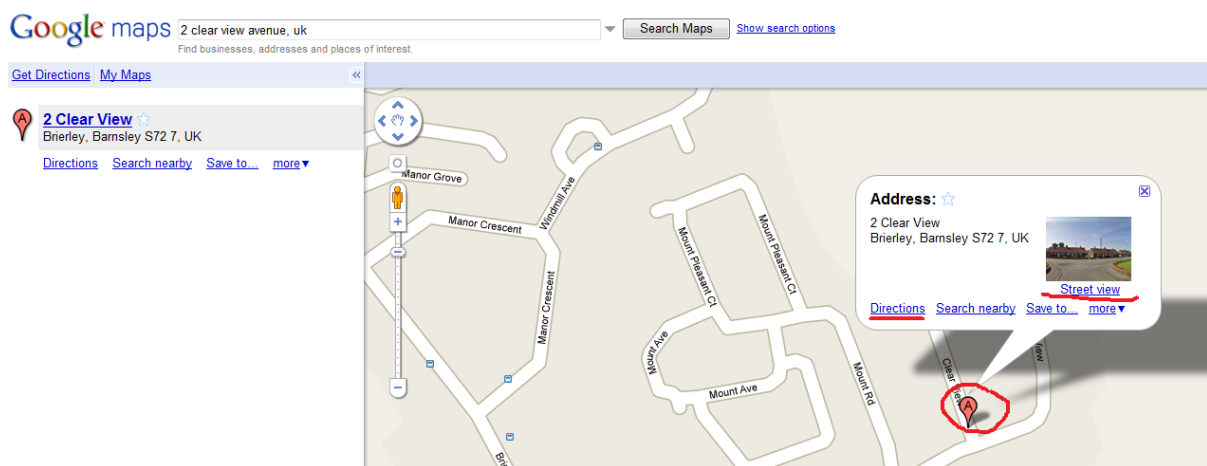
# THE MORE ADVANCED STUFF

### Hyperlink to Maps or Street View

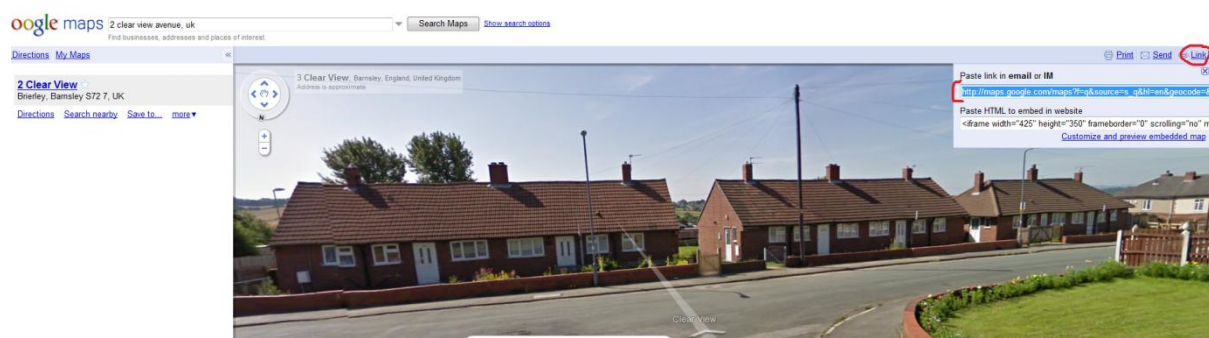
From Excel you can also use hyperlinks to enter a link to online maps such as [Google Maps](#) to a page with directions or even to Street View. Click here to see example:

[http://maps.google.com/maps?f=q&source=s\\_q&hl=en&geocode=&q=2+clear+view+avenue,+uk&sl=53.876821,-2.882538&sspn=0.584524,2.108002&ie=UTF8&hq=&hnear=2+Clear+View,+Brierley,+Barnsley+S72+7,+United+Kingdom&ll=53.586837,-1.375694&spn=0,359.967062&z=16&iwloc=](http://maps.google.com/maps?f=q&source=s_q&hl=en&geocode=&q=2+clear+view+avenue,+uk&sl=53.876821,-2.882538&sspn=0.584524,2.108002&ie=UTF8&hq=&hnear=2+Clear+View,+Brierley,+Barnsley+S72+7,+United+Kingdom&ll=53.586837,-1.375694&spn=0,359.967062&z=16&iwloc=)

A page like this will open. Click on the red flag shown and you will be provided with further options such as Directions or Street View.



At the top left of the screen click on **Link** and copy the URL.



As you can see though the link is very long and it is not practical to paste the actual link directly into the customer column.

Select the text you wish to use as a Hyperlink and use the Hyperlink feature to create the link from the customer's street name for example.

## Mail Merging

It is possible to use the customer data in Round Tracker to mail merge with other Office programs such as Microsoft Outlook or Word.

For information on how to use Mail Merges see:

<http://office.microsoft.com/training/training.aspx?AssetID=RC102778121033>

A list of Mail Merge field ranges are already preset in Round Tracker.

We recommend you use the Mail Merge wizard to use this feature as described in the link above.

Why not join our dedicated support and network forum at

[www.roundtracker.info](http://www.roundtracker.info) for more tips and tricks!