



# Setting Office Controls in Track

Use Track's Setup features to configure Office Controls to conform to an office's setup.

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## Office Controls

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Track can auto-number orders, calculate the due date on new orders, and define header and footer information on printed statements.

## Automatic File Numbering

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1. Click **Setup > Office Controls**.
2. Enter the *File Number Prefix* (optional). The prefix may contain letters, numbers, and hyphens, and is included at the beginning of every file number. Enter the starting number for auto-numbering in *Starting File Number*.

The screenshot shows the 'Office Controls' dialog box. The 'File Number Prefix' is set to '588' and the 'Starting File Number' is set to '1'. The 'Stationery Heading and Footing Text' section includes fields for Firm Name, Firm Type, Firm Addr1, Firm Addr2, Firm CSZ, Firm Phone, Fax, and Firm E-Mail. The 'Office Information' section includes Turnaround Days, Surcharge, and a checkbox for 'Display Time Fields'. The 'Days in Work Week' section includes checkboxes for Sun, Mon, Tue, Wed, Thu, Fri, and Sat. The 'EDI' section includes fields for Type, Code, and Group. The dialog has 'OK' and 'Cancel' buttons at the bottom.

3. Click **OK**. Automatic numbering begins with the next order created.

**NOTE:** The minimum length of the automatically generated file number, including prefix, is eight characters. Track inserts zeros if the number of characters in the prefix plus the starting file number is less than eight. For example, if the prefix is 598 and the starting file number is 1, the first file number is 59800001.

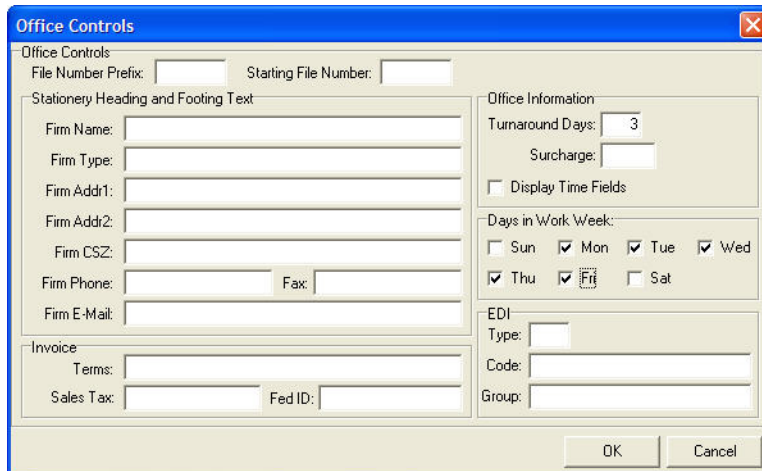
**TIP:** Automatic file numbering applies to all computers sharing the same database.

## Calculating Due Date

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Once configured, Track calculates the due date based upon the computer's current date, days in the work week, and turnaround days, and enters this date in the *Due Date* field on the Order form. Calculated due dates may be manually overridden.

1. Click **Setup > Office Controls**.
2. Enter the estimated turnaround time, in days, in *Turnaround Days*.



**TIP:** Check the *Display Time Fields* box if additional fields are required for recording time entries. The additional fields appear to the right of the date fields on the Order form.

3. Check working days in *Days in Work Week*, uncheck non-working days, and click **OK**.

## Configuring Heading and Footing Text

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1. Click **Setup > Office Controls**.
2. Enter the firm information in *Stationery Heading and Footing Text*, enter the applicable invoice information in *Invoice*, and click **OK**.

**Office Controls**

Office Controls  
 File Number Prefix: 598 Starting File Number: 1

Stationery Heading and Footing Text  
 Firm Name: Algood Appraisals  
 Firm Type:  
 Firm Addr1: 24 Old Kings Road North  
 Firm Addr2: Suite 2  
 Firm CSZ: Palm Coast, FL 32137  
 Firm Phone: 386-123-1234 Fax: 386-123-1235  
 Firm E-Mail: info@algoodappraisals.com

Office Information  
 Turnaround Days: 3  
 Surcharge:  
 Display Time Fields

Days in Work Week:  
 Sun  Mon  Tue  Wed  
 Thu  Fri  Sat

EDI  
 Type:  
 Code:  
 Group:

Invoice  
 Terms:  
 Sales Tax:  
 Fed ID:

OK Cancel

**NOTE:** *Stationery Heading and Footing Text* prints at either the top or the bottom of management reports. *Invoice* information applies to invoices printed from Track.

## Invoice Defaults

1. Click **Setup > Office Controls**.
2. Enter the applicable invoice information used for client billing and click **OK**.

**Office Controls**

Office Controls  
 File Number Prefix: Starting File Number:

Stationery Heading and Footing Text  
 Firm Name:  
 Firm Type:  
 Firm Addr1:  
 Firm Addr2:  
 Firm CSZ:  
 Firm Phone: Fax:  
 Firm E-Mail:

Office Information  
 Turnaround Days:  
 Surcharge:  
 Display Time Fields

Days in Work Week:  
 Sun  Mon  Tue  Wed  
 Thu  Fri  Sat

EDI  
 Type:  
 Code:  
 Group:

Invoice  
 Terms: Net 30 days  
 Sales Tax: 7 Fed ID: 22-1234567

OK Cancel

### **Terms**

The payment terms.

### **Sales Tax**

The tax charged expressed as a percentage.

### **Fed ID**

The firm's Federal Identification number.