



Technical Tuesday

REAL LIFE TECHNICAL SUPPORT QUESTIONS

Our Customer Said

“I want to create and add new templates to Job Tracker please can you tell me how to do this?”



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REAL LIFE TECHNICAL SUPPORT ANSWERS

We Said

“Job Tracker Professional uses MS Word and MS Excel Templates. For full details of how to use Word and Excel Templates please refer to the Microsoft Word and Excel documentation.”

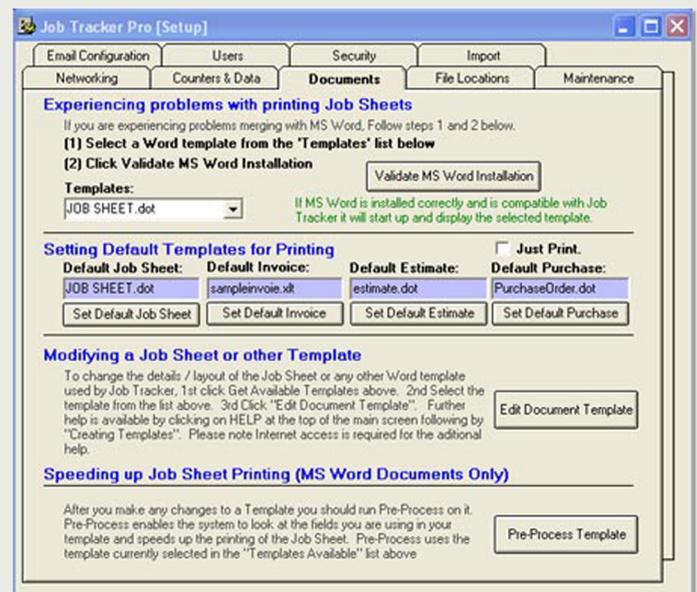
To modify a template within Job Tracker click on Control Panel then click on the Documents tab. Clicking on the Templates box button will display a list of the currently available templates.

To set a Default Template select the template from the Templates list then click the appropriate Set Default button.

To edit a template, first select the desired template from the Templates list then click the Edit Document Template button. MS Word or MS Excel will start up and display the template for editing.

A list of field names for use with templates is available in the Downloads section of our website.

Pre-Process:- After making adding or removing any fields to a MS Word Template it is essential to run Pre-Process Template. Make sure the template is selected in the Templates list before clicking on Pre-Process Templates.



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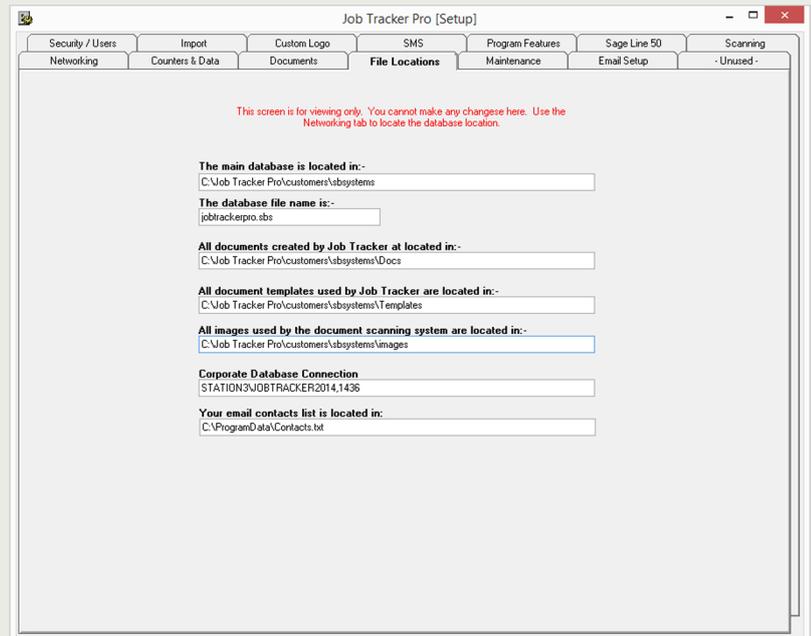
REAL LIFE TECHNICAL SUPPORT ANSWERS

We Said

“Adding a new template to Job Tracker Pro

To add a new template to Job Tracker Professional simply copy the created template into the Templates folder of Job Tracker Pro. The default location of this folder is \Job Tracker Pro\Templates however, this location may change if you have configured the system for network use.

Clicking on the File Locations in Control Panel will display the various paths Job Tracker Professional uses.



Template Field Names

All template field names need to be separated from other words, numbers, characters etc. i.e. If a fieldname such as [CLIENTFIELDS1] appears in line with other text, it must have a space before and after it. MS Word and MS Excel will search through the template and replace any field names with the appropriate data from the database. e.g. If you wanted to start a letter with Dear Mrs Jones where Mrs Jones was the name of a customer your template would be set as follows.

Dear [CLIENTCONTACT0]

When you print a Job Sheet the system would automatically replace [CLIENTCONTACT0] with the name Mrs Jones.

All normal formatting and features available in MS Word and MS Excel can be used in templates.

Within the Downloads section of our website you can find a selection of template documents to help get you started.

