

# HOW TO: Use your QTRAK Customisations



QA software

This FAQ has been designed specifically for [CLIENT] and assumes that the QTRAK customisations supplied by QA Software have been installed. This FAQ is intended as an addendum to the QTRAK User Guide. This FAQ covers:

- (a) Summary of Mail Forms provided
- (b) How to complete the Mail forms
- (c) Reference Numbers
- (d) Other Customisations

## (A) Summary of Mail Forms

Below is a summary of the Mail Forms provided to [INSERT COMPANY NAME]

Mail Type Description	Mail Type Abbreviation
Architects Advice	AA
Consultant's Advice Notice	CAN
Defects Notice	DEFECTS
Design Instruction	DI
Design/Documentation Review	DR
Facsimile	FAX
Incoming Correspondence Record	IC
Letter	Letter
Memorandum	MEMO
Meeting Minutes	MM
Incoming Correspondence Record	IC
Non Conformance	NC
Memorandum	MEMO
Request for Information	RFI
Project Managers Instruction	PMI
Purchase Order	PO
Sample Approval	SA
Site Instruction	SI

**Note** that additional Mail types can be added at any time throughout your project's duration. Please contact [sales@qa-software.com](mailto:sales@qa-software.com) for more information on how to do this.

## (B) How to Complete your Mail Forms

The QTRAK User Guide provides instructions on how to create standard mail forms. For [CLIENT] this applies to [INSERT FORM TYPES I.E. LETTER, FAX, MEMO]

This FAQ is designed to explain custom forms not covered in the QTRAK User Guide. For [CLIENT] this applies to [INSERT FORM TYPES I.E. Meeting Minutes, Purchase Order, Site Instruction]

## B.1 Letter

The Letter template has been designed to be used with Letter Head paper and this is default setting. However [CLIENT] may choose to let QTRAK generate the Letter head design. To create a letter:

1. From within the Master Document Register, click on the New Button and select **Letter**
2. Complete the Distribution and Subject title.
3. Save the Mail item thereby generating the reference number.
4. Complete the relevant details on the lower part of the screen.
5. To generate a letter where QTRAK will create the Letter Head design deselect the Tick Box captioned; "Use Letter Head Paper"
6. To use the Letter Head Paper automatically select the "Use Letter Head Paper" Tick Box.

## B.2 (Mail types with Multiple Page frames) [INSERT MAIL TYPE]

7. From within the Master Document Register, click on the New Button and select [INSERT MAIL TYPE]
8. Complete the Distribution and Subject title.
9. Save the Mail item thereby generating the reference number.
10. Complete the relevant details on the lower part of the screen.

**Note** that the two arrows to the right of the Binders and Tasks drop downs on the right hand side of the screen are now black. When these arrows are black it denotes that they have been activated.

11. Click on the down pointing black arrow to reveal an additional page frame and complete the details on the lower part of the screen.
12. Continue clicking the down pointing black arrow to reveal additional page frames. When the arrow turns grey you have reached the last page frame.
13. Click on the up pointing black arrow to return to previous page frames. When the arrow turns grey you are back at the first screen.

## B.3 Incoming Correspondence (Mail types with drop downs) [INSERT MAIL TYPE]

The following drop down lists have been provided for use within the **Incoming Correspondence** [INSERT MAIL TYPE]:

- **Type of Mail** [INSERT DROP DOWN NAME]
- [INSERT DROP DOWN NAME]

Before the **Incoming Correspondence** [INSERT MAIL TYPE] can be created you must first put values into the above drop down tables. To do this:

1. From the View menu select Configuration tables.
2. From the files drop down in the top right hand corner select **Type of Mail** [INSERT DROP DOWN NAME]
3. Click on the New button (F4) complete the details and click OK.
4. Repeat step 3 above for all other values.
5. Repeat steps 2 – 4 above for [INSERT DROP DOWN NAME]
6. Click Close

To create the **Incoming Correspondence** [INSERT MAIL TYPE]:

7. From within the Master Document Register, click on the New Button and select [INSERT MAIL TYPE]
8. Complete the Distribution and Subject title.
9. Save the Mail item thereby generating the reference number.
10. Click on the drop down(s) and select the required values.

#### **B.4 Meeting Minutes (Mail types with parent/child fields) [INSERT MAIL TYPE]**

1. From within the Master Document Register, click on the New Button and select **Meeting Minutes** [INSERT MAIL TYPE]
2. Complete the Distribution and Subject title
3. Save the Mail item thereby generating the reference number.
4. Complete the text fields in the lower part of the screen.
5. Click on the drop down(s) and select the required values.

**Note** that these drop down(s) are populated via the Address Book.

**Note** that the two arrows to the right of the Binders and Tasks drop downs on the right hand side of the screen are now black. When these arrows are black it denotes that they have been activated.

6. Click on the down pointing black arrow to go to the next page frame.
7. At the **Meeting Items** page click on the New button which is located directly above the **Item No. field** and complete the Item Number and Item details.
8. Repeat step 7 for all other **Meeting Items**.
9. To delete an Item place the curser in the item row to be deleted and click on the Delete button.
10. Click on the down pointing arrow to go to the next page frame.
11. Click on the Address Book icon to select the Meeting Attendees. This icon is located directly above the Attendees field.
12. This icon will take you to the Address book where the Unselected Attendees will be positioned on the left hand side of the screen. To select the Attendees they must be moved to the right hand side of the screen. Move the Attendees by clicking on them and then clicking on the right facing mover arrow located in the middle of the screen.
13. Click OK to return to the **Meeting Attendees** screen.

**Note** that a short cut to selecting the attendees is to double click on the contact which will automatically move that contact to the other side of the screen.

14. Select whether a contact is an Attendee, Copy Only or Apology by selecting the appropriate radio button next to their name.

#### **B.5 (Mail types with calculation fields) [INSERT MAIL TYPE]**

1. From within the Master Document Register, click on the New Button and select [INSERT MAIL TYPE]
2. Complete the Distribution and Subject title
3. Save the Mail item thereby generating the reference number.
4. Complete the text fields in the lower part of the screen.
5. Click on the New button which is located directly above the **Item No. field** and complete the Item Number and Description.
6. Type in the Quantity of the item in the Qty field.
7. Type in the Unit Price of the Item in the Unit Price field.

**Note** that the Amount field will auto-calculate as the product of the Qty x Unit Price.

8. Repeat steps 5 - 7 for all other **Items**.

**Note** that the Subtotal field will auto-calculate as the sum of the Amount column.

9. To delete an Item place the cursor in the item row to be deleted and click on the Delete button.
10. If GST is applicable in the GST field type in the GST percentage i.e. 10

**Note** that the total field will auto-calculate as the sum of the Subtotal + the GST percentage calculation.

## **(C) Reference Numbering**

[CLIENT] has the following reference numbering systems for their Mail Types.

### **C.1 Stored Reference Number**

**Sequential per Mail Type:** The sequential reference number increments by one per each Mail Type. i.e.

LETTER-000001, LETTER-000002, LETTER-000003, FAX-000001, FAX-000002, MEMO-000001

**Sequential across Mail Types:** The reference number increments by one across **(one or all)** Mail Type [LIST THE MAIL TYPES THAT THIS APPLIES TO] i.e.

LETTER-000001, FAX-000002, MEMO-000003, FAX-000004, LETTER-000005, LETTER-000006

**Note** that this does (not) apply to the Incoming Correspondence Mail Type.

**Sequential per Company:** The reference number increments by one per mail sent to each company regardless of the type of mail sent. i.e.

QAS-000001, QAS-000002, QAS-000003, EPS-000001, EPS-000002, QAS-000004, EPS-000003

**Note** that the Company ID of the company is used in the stored reference number.

**Sequential per Company & Mail Type:** The reference number increments by one per mail type sent to each company. i.e.

QAS-FAX-000001, QAS-FAX-000002, QAS-LETTER-000001, EPS-FAX-000001, EPS-LETTER-000001

**Note** that the Company ID of the company is used in the stored reference number.

**Sequential per [other field]:** The reference number increments by one per [other field]

[EXAMPLE]

## C.2 Printed Reference Number

The printed reference number (the reference number that appears on the forms) for [CLIENT] is as follows:

PPPP-CCCC-TTTT-#####

Where:

PPPP = Project Number  
CCCC = Company ID  
TTTT = Mail Type  
##### = Sequential Reference Number

## (D) Other Customisations

### D.1 Mandatory Binders and Sections

Binder and Sections allocation is mandatory for [INSERT COMPANY NAME]. When a Mail Type is created, before it can be saved the user must file the Mail in a Binder + Section combination. QTRAK will automatically direct the user to the Binder /Section selection screen when trying to save the document.

Please refer to the QTRAK User Guide for more information on how to Create and Manage Binders and Sections.

### D.2 Mandatory Incoming Correspondence Types

Specifying the Incoming Correspondence types is mandatory for [INSERT COMPANY NAME]. QTRAK will not allow an incoming correspondence Mail item to be saved unless the Mail Type is selected first. Creating Incoming Correspondence types is covered in section B of this FAQ.

### D.3 Custom reports

[CLIENT] has a custom report for [INSERT REPORT TYPE]. To run this report:

1. From the File menu select Print Standard Reports.
2. Click on the Report on drop down and select **Custom**
3. Select the report number you require from the list.
4. Apply a filter if appropriate
5. Click OK to generate the report.