Client Service Department

CurrentTrack.com

Welcome to Current**Track**®! We're glad you've joined our community. Over the next few days, you'll begin using Current**Track** and will quickly realize what an integral role it'll play in your day-to-day routine.

To help familiarize yourself with the system, we've outlined a few features we think will be important to your role in the Client Service Department.

www.CurrentTrack.net

Agency: _____

User: _____

Password: _____

Enter Personal Information

Admin — Edit Employee Information

Change Password

Admin — System Administration — Change My Password

Messages

To view system-generated Messages:
Dashboard — (Unread/Read) Messages OR 1

To Delete system-generated Messages:
Dashboard — (Unread/Read) Message

To receive Messages at an outside e-mail address:
Admin — Edit Employee Information — Preferences [Notifications]

Special Permission

If you've been given Permission by your System Administrator:

To open a new Job:
Clients & Jobs — Client — I Want To: Add Job for This Client OR + *— Job*

To assign Tasks:
Clients & Jobs — Client — Job One Sheet — I Want To: Manage Workback Schedule + *— Task*

© 2019 by Current**Track** and may not be reproduced or distributed without written permission.

CurrentTrack.com

Tasks and Events

To add your Task list to your Dashboard:
Dashboard — Edit Tracklets — Task List [current Tracklets] — Submit

To view your Assigned Task List (and Personal To-Do List):
Status Reports OR *Dashboard — Task List*

To mark a Personal To-Do List item Complete (or to delete):
Status Reports — I Want To: Edit Personal To-Do List

To view Working Tasks by Client:
Status Reports — I Want To: View Working Tasks List

To view Tasks in Calendar format (Daily Calendar default view):
Calendar — I Want To: View [Weekly, Monthly] Calendar

To add an Event to your Calendar:
Calendar — View Monthly Calendar — Add OR *Calendar — I Want To: Add an Event*

To edit an Event:
Calendar — [click on] Event OR *I Want To: View Monthly Calendar — [click on] Event*

To view another Employee's Calendar:
Calendar — I Want To: View Employee(s) Calendar

Client Contact Report

To Create:
Clients & Jobs — Client — I Want to: Create Client Contact Report

To Edit/Move/View (once filed by your System Administrator):
Clients & Jobs — Client — Job One Sheet — I Want To: Open Documents Folder
To delete, *Edit — Delete*

Production Estimate

To Create:
Clients & Jobs — Client — Job One Sheet — I Want To: Create Production Estimate

To Edit/Move/View:
Clients & Jobs — Client — Job One Sheet — I Want To: Open Documents Folder
To delete, Edit — Delete.

Client Interface

To view posted files (as Employee):
Clients & Jobs — Client — Job One Sheet — I Want To: Open Attachments Folder

To View (as Client):
Go to www.CurrentTrack.net, type in Agency, User Name, Password
Job One Sheet — View

© 2019 by Current**Track** and may not be reproduced or distributed without written permission.

To View (as Vendor):
Go to www.CurrentTrack.net, type in Agency, User Name, Password
Job One Sheet — View

Progress Report, Purchase Order, other forms

To Create:
Clients & Jobs — Client — Job One Sheet — I Want To: Create [document]

To Edit/Move/View:
Clients & Jobs — Client — Job One Sheet — I Want To: Open Documents Folder — Edit/Move/View [document]
To delete (other than P.O.), Edit and then click Delete

Financial Report

Clients & Jobs — Client — Job One Sheet — I Want To: View Financial Report

Alerting Accounting of Billout

Clients & Jobs — Client — Job One Sheet — I Want To: Create Progress Report
Be sure to cc: the Accounting Manager before submitting, unless (s)he is auto-notified.

Time Sheet and Expense Reporting

To record your time: *Time & Expenses — [select date] — Submit OR* +
Time is calculated in decimals, not minutes (e.g. 15 minutes = .25 Hours)

To View your Completed Time Sheet:
Time & Expenses — View Completed Time Sheet —Date — Submit

To Submit your Expenses:
Time & Expenses — I Want To: Submit my Expenses

To View your Expense Report:
Time & Expenses — I Want To: View my Expenses

We encourage you to explore the many features of Current**Track** and to better familiarize yourself with the system as a whole. If, at any point, you have a question, would like to make a comment or submit a suggestion, simply click atop all Current**Track** pages. There's also a detailed Help section containing FAQ, a full-length Reference Manual, Quick Reference, and several other tools, available within the system.

Sincerely,

The Current**Track team**
help@currenttrack.com
1.877.280.2392

© 2019 by Current**Track** and may not be reproduced or distributed without written permission.