

Operations Manager

- Make one person responsible for opening Job Numbers. This creates a better sense of order and enables you to more tightly control workflow.
- Use the hotlinks atop content boxes to navigate throughout the system.
- Get up and walk around your agency as much as possible.
- Remember, Current**Track** is a tool for evolution, not revolution.
- Use the Master Task List to carefully monitor workflow bottlenecks and effectively plan personnel time.
- Make www.CurrentTrack.net your browser home page.
- Use the Financial Report Summary to monitor budgeted vs. actual figures by Year, Client, Job Type, etc.
- Misfile a form in Current**Track**? Simply go to *Clients & Jobs – Client – Job One Sheet – I Want To: Open Documents Folder*. Click its Move link, enter the correct Job Number and click Move Document.
- Add the Budget vs. Actual Tracklet to your Dashboard.
- Use the Time Summary to monitor the amount of time being spent on a particular Client or Job Type.
- Visit www.CurrentTrack.com/blog for helpful posts on workflow, time-keeping and more.
- Place upcoming Events on your Calendar as soon as you're aware of them.
- Use the All Open Jobs List to monitor Job Numbers.
- Use the Manage Purchase Orders interface to sort by Vendor, Client, Date range, etc.
- Clean out your Unread and Read Message boxes often.
- Forget to copy someone on a document? Simply edit it, check the box beside (re)cc and Submit.
- Complete the E-mail (Work) field of Personal Information and check the Notify box to receive Messages outside of Current**Track**.
- Use the  menu, at the top of the screen, to quickly create a Purchase Order.
- Carefully record time spent working on Tasks throughout the course of your day.
- Use the Daily Time Report to monitor who has (and hasn't) entered their time.