



# 3.0 Demonstration Disk Guide

This TransAct™ 3.0 for Windows® demonstration program contains a fully functional copy of TransAct 3.0. We've added some special features which makes it easy to evaluate TransAct 3.0 without a scale, indicator, or printer:

- **You can access everything.** You will automatically enter the program (without the usual security password) at the highest security level—Administrator—which allows you to read and update all items.
- **You do not need to manually enter customers, trucks, etc.** TransAct 3.0 contains a complete sample database with fictitious company's customers, trucks, tares, rates, and accounting information.
- **You do not need a scale.** We've replaced the serial port connection to the scale with a built-in simulator that allows you to quickly adjust weights (in multiples of 3000 lbs) on the program's Weigh form.
- **You do not need a printer.** You will always have a choice when printing to simply view the ticket, invoice, or report on your screen rather than sending it to a printer. Always choose **View** rather than **Print**.
- **Note:** Regarding data on Reports and Statements, the weights charges and credit totals are randomly modified.

The actual version of TransAct 3.0 (security key needed), allows you to add categories and different ticket formats using the attached transact.ini files .

## Minimum System Requirements

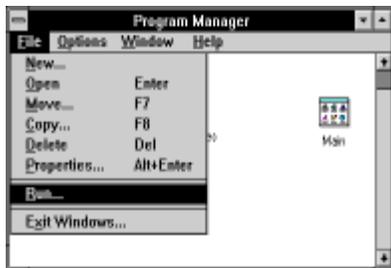
- IBM-compatible 486 75 mHz (Pentium preferred)
- At least 8 MB of RAM (16 MB preferred)
- DOS version 3.3 or higher (5.0 preferred)
- Windows 3.1 or later running in enhanced mode
- VGA, SVGA, or higher resolution monitor
- A fixed hard drive w/minimum of 4 MB available disk space

## Installing the TransAct 3.0 Demo

Insert the disk labeled **Disk 1 of 3** into your PC disk drive slot (drive A or B).

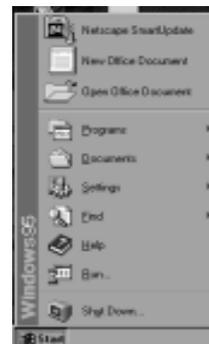
### For Windows 3.1:

Click File from the Program Manager. Then click **Run**.



### For Windows 95:

Click Start from the Taskbar. Then click **Run**.



You will be prompted to enter a run type in the command box. Type in *a:\setup*, and enter **OK**.

When prompted, choose the type of industry which most closely relates to your business.

- **Solid Waste** names tables **Hauler** and **Refuse** used in landfills, recycling centers, etc.
- **General** names tables **Hauler** and **Material** used for aggregate, redi-mix, highway scales, etc.

Click **OK** to install the program in your C:\TRANSACT drive and directory.

When called for, insert **Disk 2 and then 3**. **Note: Demo's obtained from the Internet will not prompt for disks.** When asked to reboot your system, remove Disk 3 and click **YES**. Installation is now complete.

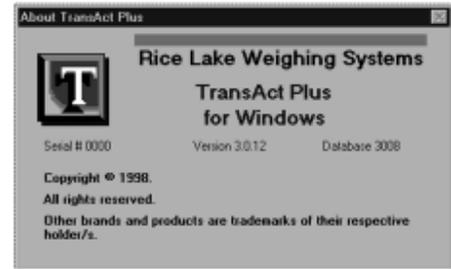
## Starting TransAct

After your computer restarts, open the Program Manager. Double-click the TransAct icon. You will be advised: "No software key has been found on your system. This program will automatically revert to a demonstration copy of TransAct."



If you have any questions about installing the TransAct software please call our technical support line at (715) 234-9171.

The program bypasses the usual Log In screen and takes you directly to the TransAct 3.0 Demo screen shown at right. You are now running the program. Click any menu icon to start using TransAct 3.0.



## Program Menu Overview

### Login...(Administrator level only)

Assign login names, access privileges, and passwords for four levels of users. Once the administrator sets the logins, only the administrator can view or change them. In this demonstration version, this menu is inactive.

### Admin...

You will be able to set the following features: create customer accounts, enter job/order table information, create permits, and build category tables. Backup and archiving utilities are also in this menu, as well as options for importing and exporting transaction data. Set your preferences for scale and printer communication, ticket format, and transaction notes.

### Weigh...

This menu has two main parts:

- Select Transaction window where you actually begin weigh transactions.
- Weight form where you complete and print transaction tickets.

### Accounting...

Set rates, discounts, and tax charges for your operation. In TransAct 3.0, you can also generate statements and record payments to better organize your billing system.

### Reporting...

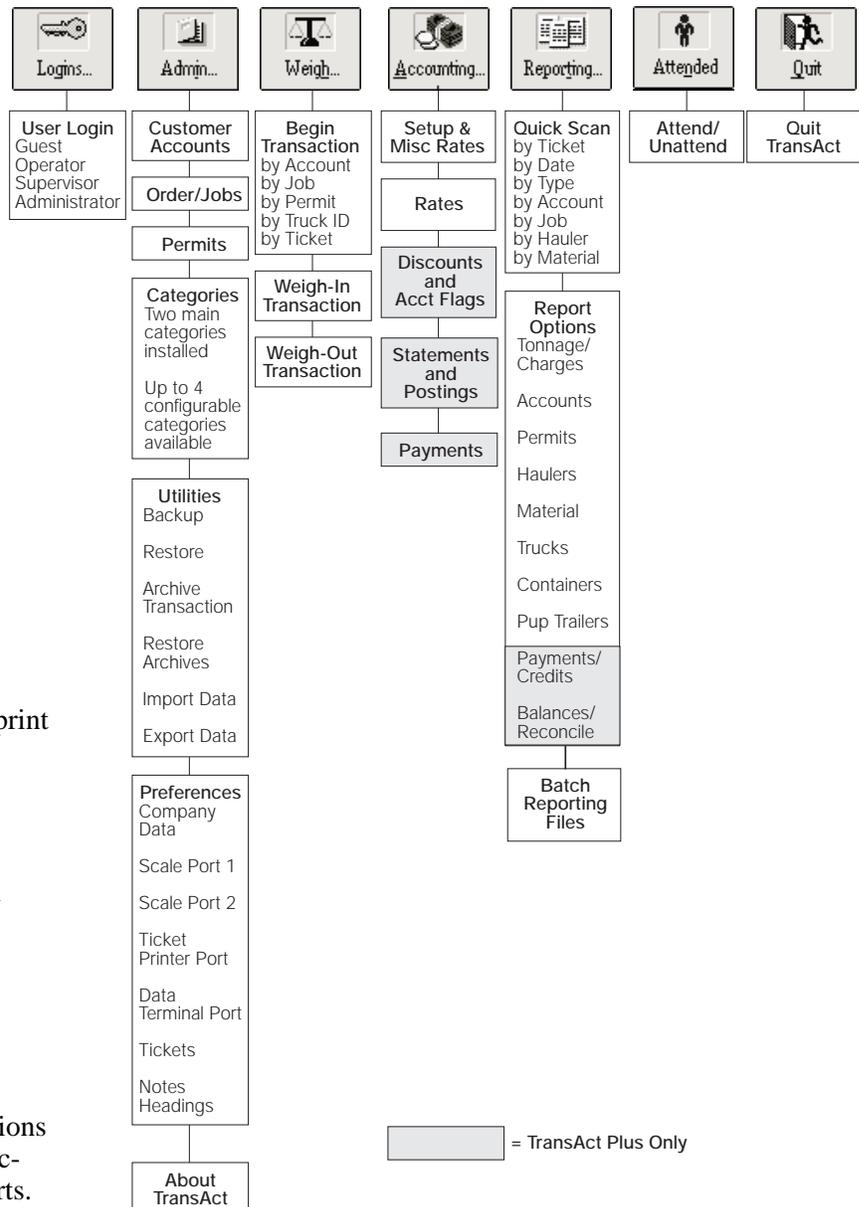
The Quick Scan function allows you to quickly search and locate stored transactions in several ways. The Report Options function selects the data for a variety of reports.

### Attended/Unattended...

Although disabled in the demo. version, TransAct 3.0 can run in attended or unattended mode. The unattended version of TransAct 3.0 is sold separately.

### Quit...

Press to quit the program.



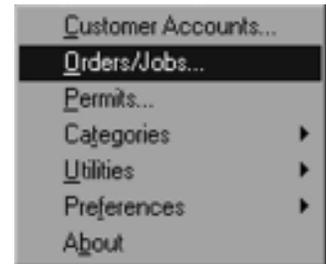
## Navigating in the Program and Setting Up Accounts

To open any Main Menu item, click on the associated icon in the Main Menu toolbar at the top of the window (shown below). The only active buttons in this demo are Admin., Weigh, Accounting, Reporting, and Quit.



### Admin...

Several attached menu items appear in a drop-down list shown on the right. Menu items with attached sub-menus have triangles next to them. When you select one of these items, the associated sub-menu appears as another drop-down list. Click on the desired sub-menu item to open.



Click **Customer Accounts**, to open the first Customer Account Table. The account information can be entered or edited by clicking inside the desired box. Any box followed by a single down-arrow has a list of choice items under it. Click on the arrow to display the choices, then click on your choice.



Click on the **Accounting Info...** hotlink button (shown above right), to jump to the Customer Account Table for this customer. You can edit this screen (except for manually altering the reconciled account balance), or move to other customer's account tables by using the function buttons at the bottom of this table. Save any changes in the table, then click the blue **General Info...** button to return back to the Customer Account Table.

Click **Truck...**, **Container...**, or **Pup Trailer...** hotlink buttons to jump to those tables (if assigned) for this customer. Any of these tables can also be edited and saved. Click the **General Info...** hotlink button to return.

Notice that if you make any changes to any table, the **Save** button at the bottom of the screen becomes active. You must press **Save** to enter changes before moving to the next customer account. If you forget, you'll be reminded.

The **Save** button is one of nine Function buttons at the bottom of all TransAct 3.0 tables. These Function buttons help you move around easily in tables and perform various common operations. Click the buttons to see their effect. Remember that **Save** is only active when you have changed something in a table. **Find** will show a list of all tables established in that menu. Click **Undo** to cancel changes made before they're saved. Click **Delete** to cancel saved items for the displayed table.



Click on any of the other Main Menu icons in the toolbar to close the current window and move to another portion of the program.

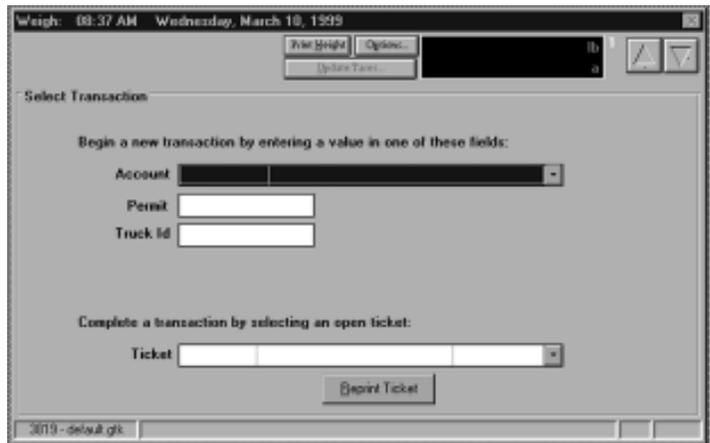
## Starting a Weigh Transaction



Assume a truck has just come onto your scale. Click **Weigh...** from the main menu toolbar to bring up the Select Transaction screen shown at right.

If you know that the truck's tare stored in your system is incorrect or out-of-date, press **Update Tares...** now. You can update that tare from the scale (if the truck is empty) or key in a manual tare weight. To simulate scale weight and see a reading, click the up simulator key several times. Each click adds 1,000.

Press **Options...** to see if you'd like any changes in those items. If you only want to generate a numerical weight ticket without assigning an account, press **Print Weigh...**



To assign the truck to one of your registered accounts, use the down arrow to select one from the Account list. Or enter a Permit number, License Number, or Truck Id and TransAct 3.0 will find the correct account for you. This opens the Transaction Details screen shown below.

## Completing a Weigh Transaction

Choose the truck number, and any container or trailer attached. You may also change Hauler or Refuse items, units, Incoming/Outgoing Material Direction, add notes, or record cash payments.

Time and Date

Established in previous screen. Non-editable here

If different than Customer Account

Inactive: none specified in table for this truck

Gross weight

Consecutive ticket no.

Ticket format

Total of Truck and Container tares

Rate information

Status bar

Simulated weight display

Simulator buttons (Demo disk only)

Click to add Notes to ticket

Click to change Units

Click to Print Ticket

Click to record cash payment

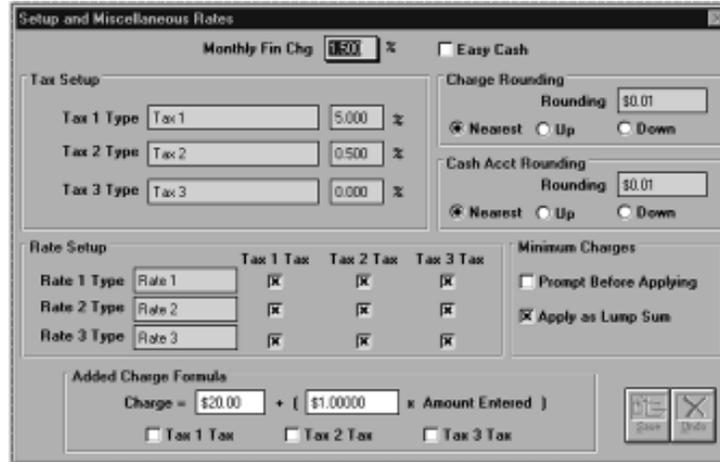
When all desired changes are made, click **Print Ticket** to complete the transaction and print and store the ticket.

## Accounting...



Click on the **Accounting** button to access a pull down menu which allows you to define rates and taxes, setup rate tables, customer discounts, print statements and record customer payments and credits. The information can be added or edited by clicking inside the desired box.

Discounts and Account Flags, Statements and Postings, and Payments are available only in TransAct Plus.



The dialog box is titled "Setup and Miscellaneous Rates". It contains several sections:

- Monthly Fin Chg:** A text box with "0.500" and a percentage sign.
- Easy Cash:** An unchecked checkbox.
- Tax Setup:** Three rows for Tax 1, Tax 2, and Tax 3. Each row has a text box for the tax type and a text box for the rate (5.000%, 0.500%, and 0.000% respectively).
- Charge Rounding:** A text box for "Rounding" with "\$0.01" and three radio buttons: "Nearest" (selected), "Up", and "Down".
- Cash Acct Rounding:** A text box for "Rounding" with "\$0.01" and three radio buttons: "Nearest" (selected), "Up", and "Down".
- Rate Setup:** A table with columns for "Rate 1 Type", "Rate 2 Type", "Rate 3 Type", "Tax 1 Tax", "Tax 2 Tax", and "Tax 3 Tax". Each cell contains a text box for the rate type and a checked checkbox for the tax type.
- Minimum Charges:** Two checkboxes: "Prompt Before Applying" (unchecked) and "Apply as Lump Sum" (checked).
- Added Charge Formula:** A text box containing the formula: "Charge = \$20.00 + ( \$1.00000 x Amount Entered )". Below it are three checkboxes for "Tax 1 Tax", "Tax 2 Tax", and "Tax 3 Tax", all of which are unchecked.

## Generating Reports

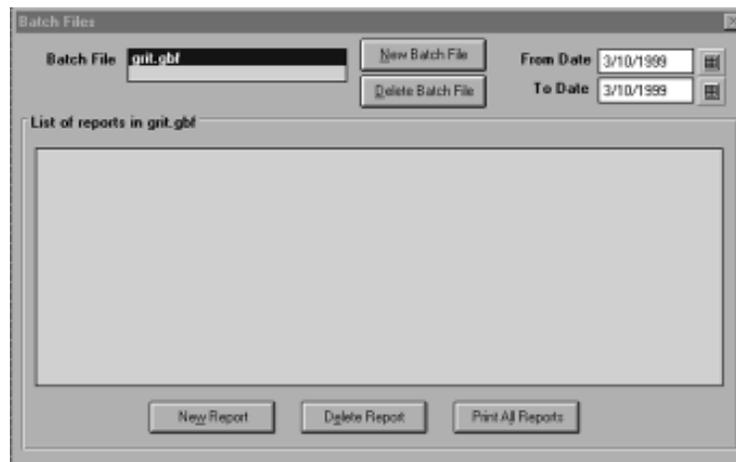


Use the **Reporting...** section to scan stored transactions based on selected criteria, reprint or edit stored transaction tickets and create daily, weekly and monthly reports based on the selected criteria.

**Quick Scan** lets you search, retrieve, and view stored data.

**Reports** lets you view the selected report first.

**Batch Reporting Files** lets you print a list of frequently used reports such as daily, monthly, or quarterly reports. You can click on the New Batch File button to create a new batch file. Enter the name (ie: daily, weekly, monthly) for the batch file.



The dialog box is titled "Batch Files". It contains the following elements:

- Batch File:** A text box containing "gnt.gbl".
- New Batch File:** A button.
- Delete Batch File:** A button.
- From Date:** A text box containing "3/10/1999".
- To Date:** A text box containing "3/10/1999".
- List of reports in gnt.gbl:** A large empty rectangular area.
- Buttons at the bottom:** "New Report", "Delete Report", and "Print All Reports".