TracManager Module and Function Summary

"We provide cabinet shops with software to track job costs and improve productivity."

Modular Functions

Modules & Functions

Conventional systems require your business to 'fit' the software. Tractivity provides a modular system that 'fits' your business.

Prepackaged Systems combine modules to provide a desired functional solution.

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Time & Payroll Module

Time & Payroll Module - Foundation

The Time & Payroll Module provides a foundation for all other modules. This module includes the customer, job, employee, labor activity and business rule management.

Customer

Maintain a centralized database of customer contact information with multiple contacts including phone and email. Record notes and create reminders as needed. Customer Center view provides a view of all related customer activity including jobs, purchase orders, estimates, orders and documents when applicable. Customer may be imported from a spreadsheet to avoid manual data entry. Additionally, customers may be integrated with QuickBooks.

Job Management

Track and manage multiple job types including Unpaid, Production, Overhead, Presale, Work orders and Batch. Attach related documents, create job labor and material take-off budgets. Capture notes from data capture users and pictures from Android iTrac users. Track actual material charges and purchase orders to the job. Capture and view actual labor transactions to the job. View job progress as percentage of complete and projection. Import jobs with labor and material requirements from Cabinet Vision. Jobs may be sent directly to QuickBooks.

Time & Payroll Module

TIME TRACKING & DATA CAPTURE

QUICKBOOKS INTEGRATION

HR & PAYROLL PREPERATION

Employees

Maintain a HR records for employees including contact information. Assign custom configured payroll rules, set burden and workers' compensation rates, accrue paid time off benefits, manage and report planned absences. May import employees via spreadsheet to avoid data entry. May share employee records with QuickBooks.

Labor Activities

Manage labor activities including setup, rework, overhead, production and billable types. Set labor class overhead rates to augment general overhead rate when a specified type of labor is performed. Report labor by activity distribution to assist process analysis. May import from Excel and share with QuickBooks as service items.

Payroll

Calculate payable hours by cost code and rates base upon user defined payroll rules. Calculate daily and/or weekly overtime, prevailing wage, shift differential, night shift premium or activity-based compensation. Track workers' compensation hours by risk category. Support paid time off (PTO) based on accruals. Create paid holiday timesheets for qualified employees. Supports ability to redistribute overtime to jobs outside of chronological occurrence. Export payroll hours to Excel or CSV files. May send timesheets to QuickBooks.

Cost Analysis Module

Cost Analysis Module - Summary

The Cost Analysis Module builds on the Time & Payroll module and adds job labor budgets, cost metrics, job center, job cost reporting. Access to module functions are controlled by individual user rights established by the Administrator.

Cost Analysis

Analyze job cost and cost drivers by process. Includes net profit with summary or detail of labor and material charges including overhead, burden and workers' compensation costs, WIP, budget variance, activity distribution, and material usage. Flash metrics provide labor performance and include user defined metric definitions. Metrics may be populated when jobs are imported from Cabinet Vision. Analysis includes centralized job records where all job-related costs may be viewed in a single location including budget, job progress, material charges, labor charges, purchase orders and related notes.

Materials Module

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Materials Module - Summary

The Materials & Inventory Module expands the system to include material management and material cost reporting. Access to module functions are controlled by individual user rights established by the Administrator.

Materials

Manage inventory and non-inventory material items. Manage multiple units of measure and conversions. Supports multiple supplier part numbers, pricing and UOM per material item. Maintain purchase history with prices, UOM and supplier. Material Requirements Planning (MRP). A Purchase Manager functions provides the user with a list of items to be purchased based upon user set criteria such as a job, date, supplier and more. Create purchase orders with or without job references. Receive against purchase orders with support for location and bin, back order and splits. Import materials from Cabinet Vision, Excel or QuickBooks. Export materials to Excel and may integrate materials, purchase orders and receivers with QuickBooks.

Scheduling Module

Scheduling Module - Summary

The Scheduling Module automates production scheduling with integrated feedback. Work assignments are automatically created for all jobs in the company based upon when jobs are due, the hours required for each process, the order and sequence of the manufacturing flow, the availability of required equipment and employees, employee skills and qualifications, and job priorities.

Scheduling

Modified finite scheduler utilizes job labor budget take-off hours to automatically assign work to jobs. The scheduler simulates the production process and produces a work schedule for all released jobs from the starting date into the future until all jobs are finished. The scheduler considers factors such as employee skill qualifications, process routing, equipment availability, job due dates, priority, company work days, material availability, outside and milestone requirements to assign a qualified resource to the process. Schedules may be viewed from the touchTrac and pcTrac data capture software to allow employees to see and clock into their scheduled tasks.

W.I.P. to Ship Module

W.I.P. to Ship Module - Summary

The WIP (work in process) to Ship module allows the tracking of the physical products as they are moved from stage to stage. This module also supports component and part tracking particularly parts coming off the CNC machine. Know where every product is in real-time. Products may be moved to new stages using a barcode scanner connected to the TracManager software or an Android device.

W.I.P. to Ship

Move, track and report components and products from one stage to another using a barcode reader or a mouse click. Import jobs with cabinet list from Cabinet Vision or Excel. Supports Cabinet Vision Label-IT for component and product level items. Create unlimited "stages" or locations. Integrates with touchTrac data capture station for extended barcode features that automate the time capture along with product movement. Status is updated in real-time and viewable graphically.

Estimating Module

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Estimating Module - Summary

The Estimating Module is a fully integrated catalog based estimator ideal for highly custom products, which utilizes an easy to use drag-n-drop interface with associated features and options to create one-of-a-kind custom product estimates.

Estimating

Tractivity Estimating provides a consistent accurate estimating method for custom wood working and cabinetry. The software provides drag-n-drop or quick-key product entry from a product catalog. Integration with Vero Cabinet Vision enables the system to import the Cabinet Vision catalog and schedules for estimating and then export estimates back to Cabinet Vision for S2M processing. Order may also be sent to QuickBooks as sales orders in a variety of configurations.

Data Capture
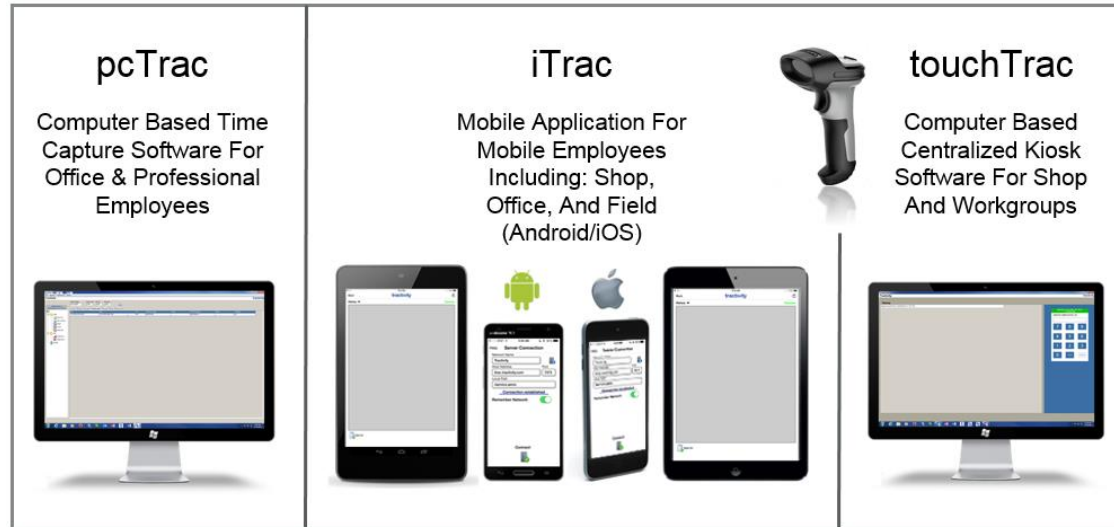
Data Capture

Data capture methods include on premise and off premise technologies. The technologies may be mixed as desired. Capture from mobile devices including cell phones and tablets using Android and iOS devices. Capture office-based personnel using PC based pcTrac for individual timesheet capture. touchTrac provides a kiosk type interface supporting multiple users on a PC platform. Windows data capture methods may also be used over the Internet with a 50MB or faster connection is available.
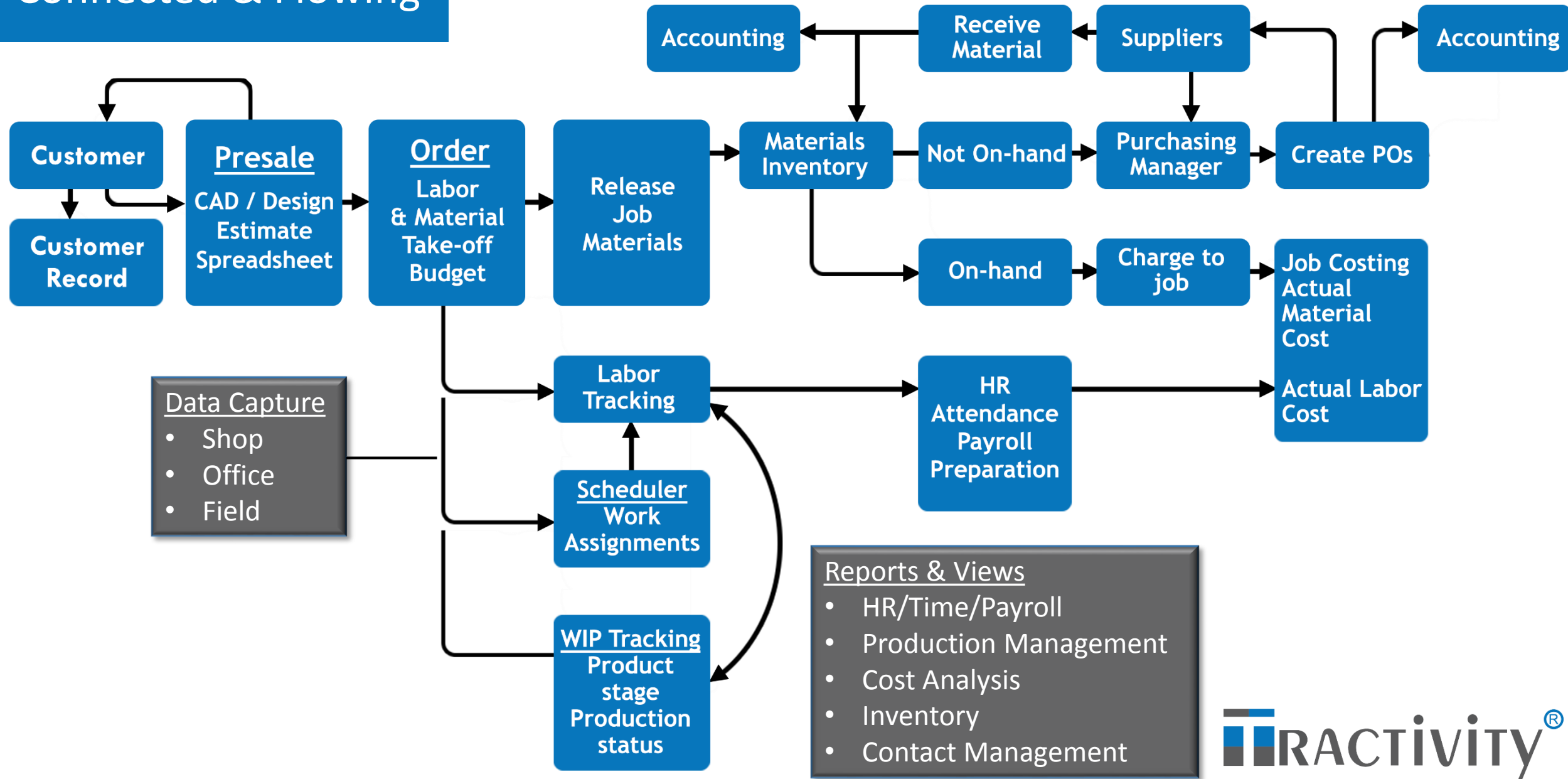
Feature	Express	Plus	Essential	Essential + SCH	Essential + WIP	Ultimate
Customer Management						
Customer Contact Notes and Reminders	x	x	x	x	x	x
Import from Excel	x	x	x	x	x	x
QuickBooks Integration	x	x	x	x	x	x
Job Management						
Job related documents	x	x	x	x	x	x
Job phases	x	x	x	x	x	x
Job Labor Takeoff budget	x	x	x	x	x	x
Job Material take-off budget	o	o	x	x	x	x
Job Progress	x	x	x	x	x	x
Job Labor tracking	x	x	x	x	x	x
Job Material tracking	o	o	x	x	x	x
Job Purchase orders	o	o	x	x	x	x
Job Notes and Pictures	o	o	x	x	x	x
QuickBooks Integration	x	x	x	x	x	x
Cabinet Vision Integration	o	o	x	x	x	x
Import from Excel	x	x	x	x	x	x
Employees						
Employee Notes & Reminders	x	x	x	x	x	x
Payroll burden	x	x	x	x	x	x
Custom fields	x	x	x	x	x	x
Benefits accrual	x	x	x	x	x	x
Planned absences	x	x	x	x	x	x
QuickBooks Integration	x	x	x	x	x	x
Import from Excel	x	x	x	x	x	x

Legend
X – Included
O - Excluded

Feature	Express	Plus	Essential	Essential + SCH	Essential + WIP	Ultimate
Labor Activities						
Setup	x	x	x	x	x	x
Rework	x	x	x	x	x	x
Overhead	x	x	x	x	x	x
Production	x	x	x	x	x	x
Billable	x	x	x	x	x	x
Activity class overhead rates	x	x	x	x	x	x
QuickBooks Integration	x	x	x	x	x	x
Import from Excel	x	x	x	x	x	x
Payroll						
Weekly overtime	x	x	x	x	x	x
Daily overtime	x	x	x	x	x	x
Activity-based compensation	x	x	x	x	x	x
Prevailing wage	x	x	x	x	x	x
Workers' Compensation Tracking	x	x	x	x	x	x
Holiday	x	x	x	x	x	x
PTO	x	x	x	x	x	x
Timesheets	x	x	x	x	x	x
Automatic timesheet approval	x	x	x	x	x	x
Overtime Redistribution	x	x	x	x	x	x
QuickBooks Integration	x	x	x	x	x	x
Export to Excel	x	x	x	x	x	x

Legend
X – Included
O - Excluded

Feature	Express	Plus	Essential	Essential + SCH	Essential + WIP	Ultimate
Materials						
Inventory management	o	o	x	x	x	x
Multiple UOM	o	o	x	x	x	x
Multiple Supplier price and SKU per Item	o	o	x	x	x	x
Inventory Adjustments	o	o	x	x	x	x
Material Kitting	o	o	x	x	x	x
Automatic reorder	o	o	x	x	x	x
Purchase and use history	o	o	x	x	x	x
lead time management	o	o	x	x	x	x
Purchase Manager - MRP	o	o	x	x	x	x
Purchase Orders	o	o	x	x	x	x
Receivers	o	o	x	x	x	x
Multiple PO Formats	o	o	x	x	x	x
QuickBooks Integration	o	o	x	x	x	x
Export to Excel	o	o	x	x	x	x
Import from Excel	o	o	x	x	x	x
WIP to Ship						
Cabinet labels	o	o	o	o	x	x
Integration with touchTrac	o	o	o	o	x	x
Barcode scan to stage	o	o	o	o	x	x
Real-time reporting	o	o	o	o	x	x
Transact from shop or field using Android	o	o	o	o	x	x

TRACTIVITY®

Legend
X – Included
O - Excluded

Feature	Express	Plus	Essential	Essential + SCH	Essential + WIP	Ultimate
Cost Analysis						
Custom FLASH metrics	o	x	x	x	x	x
Net profit	o	o	x	x	x	x
Budget Variance	o	x	x	x	x	x
Labor Activity Distribution	o	x	x	x	x	x
Scheduling						
Automated work assignments	o	o	o	x	o	x
Job Schedule Views	o	o	o	x	o	x
Integrated with data capture	o	o	o	x	o	x
Equipment resources	o	o	o	x	o	x
Skill Labor qualifications	o	o	o	x	o	x
Estimating						
Custom product catalog	o	o	o	o	o	x
Global feature settings	o	o	o	o	o	x
Multiple version	o	o	o	o	o	x
Change orders	o	o	o	o	o	x
Data Capture						
mobile Android APP	x	x	x	x	x	x
mobile iOS APP	x	x	x	x	x	x
pcTrac - for office professionals	x	x	x	x	x	x
touchTrac - shop floor kiosk	x	x	x	x	x	x
Barcode support	o	o	o	o	x	x

Legend
X – Included
O - Excluded