

## PROGRAM TRACKING

Program tracking is a module designed to handle programs where participants accumulate points or dollars that can then be used to order merchandise. There may be many participants in the program but they do not have to be set up as customers in Lakeshore.

There are two primary types of situations where this module works well:

- **Safety programs** - Participants are workers in a factory or plant that earn points when there are no accidents. They can use the points to purchase program merchandise such as shirts or ice chests.
- **Departmental budgets** - Departments are assigned a specific amount to be used to purchase advertising specialties. That budget is entered as a positive dollar amount. As orders are placed a negative entry is entered against the total.

You and/or the participant/department head can monitor the amount of points accumulated or the amount of money left in the budget. You may issue points "checks" and send statements showing activity in the program to the individual participants. There also activity reports for management.

To set up a program, follow these steps:

- 1) Assign a program number and enter program information.
- 2) You may have multiple levels in the participant structure to give you better reporting options. In the sample shown on the next few pages for a safety program at a chemical company, two levels are set up----plants and individuals. Each level must be set up individually.
- 3) Points/Dollars can be posted individually or from a spreadsheet-type file supplied by the company.
- 4) Orders for merchandise can be entered from this module. An entry will be made to subtract points or dollars from the participants total. You can also enter the order into the system directly and make a manual entry to deduct the points/dollars and note the order number.
- 5) At any point, the participants details can be displayed or shown on a points statement.

Screen shots illustrating a safety program are shown on the next few pages.

If you want to use the program to track budgets, you would make an entry at the beginning of the reporting period for the amount of budget allowed for each department. Then, as orders are entered, dollars would be deducted from that amount. The amount remaining is the amount the department would have left to spend on additional products.

# Setting up the initial program

## Set up tracking program



Program tracking number:

Description:

Description of sublevels:

1:

2:

3:

4:

5:

### Mailing Address:

Attention:

Company Name:

Street Line 1:

Street Line 2:

City:

State / Province:  Postal Code:

Country:

### Shipping Address:

Copy Mailing address to shipping address?

Attention:

Company Name:

Street Line 1:

Street Line 2:

City:

State / Province:  Postal Code:

Country:

### Contact Information:

Contact Name:  First Name:  Last Name:

Title/Position:

Telephone Number: (  )  -  Ext.

FAX: (  )  -  Ext.  LD

### Other Information:

Tracking:  Qualified Flag?  Track Points?  Track Dollars?

Clear points:  At end of period?  At end of year?

Save

Reset

Exit

# Establishing the first level

## Update ID information



Program tracking number:

Plant:

Participant:

Name:

**Mailing Address:**  Copy Addresses from previous level?

Attention:

Company Name:

Street Line 1:

Street Line 2:

City:

State / Province:

Country:

**Shipping Address:**  Copy Mailing address to Shipping address?

Attention:

Company Name:

Street Line 1:

Street Line 2:

City:

State / Province:

Country:

**Contact Information:**

Contact Name:  First Name:  Last Name:

Title/Position:

Telephone Number: (  )  -  Ext.

FAX: (  )  -  Ext.  LD

E-mail address:

**Other Information:**

Tax ID:

Comments:

# Entering the actual participant

## Update ID information



Program tracking number:

Plant:

Participant:

Name:

**Mailing Address:**  Copy Addresses from previous level?

Attention:

Company Name:

Street Line 1:

Street Line 2:

City:

State / Province:

Country:

**Shipping Address:**  Copy Mailing address to Shipping address?

Attention:

Company Name:

Street Line 1:

Street Line 2:

City:

State / Province:

Country:

**Contact Information:**

Contact Name:  First Name:  Last Name:

Title/Position:

Telephone Number: (  )  -  Ext.

FAX: (  )  -  Ext.  LD

E-mail address:




**Other Information:**


Tax ID:


Comments:


## Entering points detail


*Update program tracking detail*

MENU   

Program tracking number:  

Plant  

Participant  


Date:   *To update an existing entry, click on the look up icon and select the entry from the list.*

Description:

Points:




Reference fields:


Check/Certificate Number:


Order number:  


## Entering an order and using points accumulated


*Enter order from program tracking*

MENU   

Program tracking number:  

Plant  

Participant  

Date:  

Description:

Points:

Reference fields:

Check/Certificate Number:

## Displaying accumulated points

*Program tracking detail*

Program number: 100                      Cajun Chemical  
 Plant : A                                      Plant A  
 Participant : 1234                          Tom Black

Date	Description	Points
1/31/10	No accidents, January 2010	1000
2/28/10	No accidents, February 2010	1000
3/31/10	No accidents, March 2010	1000
3/31/10	Bonus-Accident free 1st quarter, 2010	500
4/30/10	No accidents, April 2010	1000
5/31/10	No accidents, May, 2010	1000
6/30/10	Bonus - Accident free 2nd quarter, 2010	500
7/31/10	No accidents, July, 2010	1000
9/30/10	No accidents, September, 2010	1000
10/31/10	No accidents, October, 2010	1000
11/30/10	No accidents, November, 2010	1000
12/31/10	No accidents, December 2010	1000
12/31/10	Bonus - Accident free 4th quarter, 2010	500
1/15/11	Jacket Reference: Jacket Order # <u>711013</u> (Open)	-10000
1/31/11	No accidents, January 2011	1000
<b>Ending balance</b>		<b>2,500</b>

**\*\*\*\* POINTS STATEMENT \*\*\*\***

To: Tom Black  
Cajun Chemical  
5234 Plank Road  
Plant A  
Baton Rouge, LA 70805
Statement date: February 24, 2011

Date	Description	Earned	Redeemed	Balance
	Balance forward			0
1/31/10	No accidents, January 2010	1,000		1,000
2/28/10	No accidents, February 2010	1,000		2,000
3/31/10	No accidents, March 2010	1,000		3,000
3/31/10	Bonus-Accident free 1st quarter, 2010	500		3,500
4/30/10	No accidents, April 2010	1,000		4,500
5/31/10	No accidents, May, 2010	1,000		5,500
6/30/10	Bonus - Accident free 2nd quarter, 2010	500		6,000
7/31/10	No accidents, July, 2010	1,000		7,000
9/30/10	No accidents, September, 2010	1,000		8,000
10/31/10	No accidents, October, 2010	1,000		9,000
11/30/10	No accidents, November, 2010	1,000		10,000
12/31/10	No accidents, December 2010	1,000		11,000
12/31/10	Bonus - Accident free 4th quarter, 2010	500		11,500
1/15/11	Jacket		10,000	1,500
1/31/11	No accidents, January 2011	1,000		2,500
<b>Total points available</b>				<b>2,500</b>