



SignTracker Quick Start Guide

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Introduction to SignTracker

What is SignTracker?

SignTracker is a powerful project management platform designed specifically for the signage industry. It helps businesses streamline their operations, improve team collaboration, and manage jobs efficiently from start to finish. With its user-friendly interface and specialized features, SignTracker simplifies complex workflows, making it easier to track projects, communicate with clients, and stay on top of deadlines.

Whether you're running a small sign shop or managing a large-scale operation, SignTracker provides the tools needed to save time, reduce errors, and boost profitability.

Video: [Managing your sign shop shouldn't be stressful](#)

Webinar: [Introduction to SignTracker](#)

Key Features and Functions

1. **Dashboard Overview**
 - A central hub that provides a snapshot of all your ongoing jobs, tasks, and calendar events.
 - Helps you monitor project progress, identify bottlenecks, and stay on top of priorities.
2. **Account Setup and User Management**
 - Manage team members by creating user accounts and assigning roles.
 - Ensures data security and accountability while promoting team collaboration.
3. **Contact Management**
 - Organize client information, including companies and individual contacts.
 - Keep detailed records of customer interactions to improve follow-ups and retention.
4. **Job Flow Board**
 - Visualize the lifecycle of each job with a customizable board that tracks progress through stages like quoting, production, and installation.
 - Ensures smooth transitions between stages and highlights where jobs may be delayed.
5. **Job Creation and Management**
 - Create detailed job records with descriptions, deadlines, and assignments.
 - Centralizes all job-related files and notes to keep your team aligned.
6. **Task Management and Templates**
 - Break jobs into manageable tasks and assign them to team members.
 - Use templates for recurring workflows to save time and standardize processes.

7. Quoting and Contract Management

- Generate professional quotes and contracts tailored to your branding.
- Automate calculations for materials, labor, and taxes, ensuring accuracy.

8. Calendar and Scheduling

- Plan and track deadlines, team meetings, and client appointments.
- Keep everyone aligned with automated reminders and shared schedules.

9. File and Document Management

- Attach and organize files, such as proofs, permits, and client approvals, for each job.
- Use tags and filters to quickly retrieve important documents.

10. QuickBooks Integration

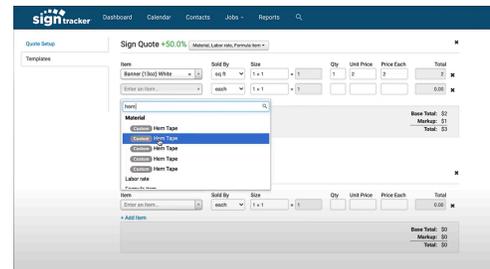
- Sync invoices, payments, and customer data seamlessly with QuickBooks.
- Simplifies financial tracking and reduces manual data entry.

11. Customizing Forms

- Design and customize forms, including quotes and contracts, to match your branding.
- Use dynamic fields to automate content population, saving time and ensuring consistency.

12. Resources and Support

- Access a wealth of training materials, including videos and webinars, to learn at your own pace.
- Get help via live chat or support tickets for any issues you encounter.



Why Choose SignTracker?

SignTracker is more than just software—it's a complete solution tailored for the unique needs of sign businesses. By integrating critical functions into a single platform, it allows you to focus on what matters most: delivering exceptional signage to your clients while maximizing efficiency and profitability.

Helpful Resources

Help Center: [SignTracker Help Center](#)

YouTube: [SignTracker YouTube Channel](#)

Sign Up for Weekly Webinars: [Sign in to Your Account to Register](#)

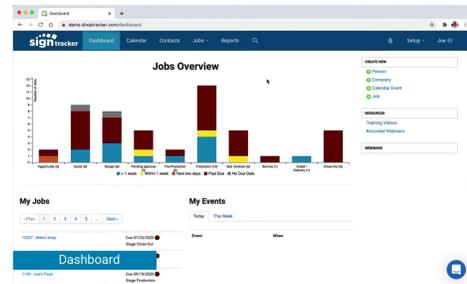
1. Dashboard Overview

What It Does

The dashboard is the primary control panel for Sign Tracker. It provides an at-a-glance view of your job flow, tasks, calendar events, and key metrics. It also gives you quick access to training resources and support.

Video: [Your SignTracker Dashboard](#)

Webinar: [SignTracker Intro](#)



Why It's Important

- **Centralized Control:** Offers an organized view of all ongoing and upcoming activities.
- **Immediate Insights:** Helps identify bottlenecks and overdue tasks.
- **Convenient Navigation:** Acts as a springboard to access all other features.

How It Helps

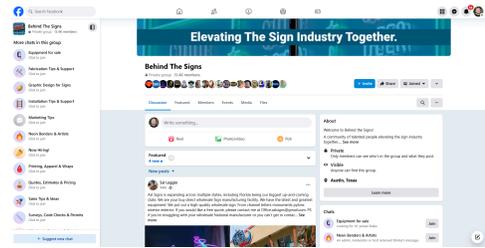
- **Increases Awareness:** Keeps everyone on the same page by displaying job progress.
- **Reduces Delays:** Highlights overdue items for quicker resolution.
- **Improves Workflow:** Enables direct navigation to key areas like tasks, jobs, and calendar events.

Step-by-Step Instructions

1. **Log In:**
 - Navigate to Sign Tracker's login page.
 - Enter your credentials and click **Log In**.
2. **Review Job Flow Snapshot:**
 - Find the **Job Flow Summary** widget.
 - Hover over each column to view the number of jobs in each stage (e.g., Quoting, Production).
 - Click on a stage to drill down and view specific jobs.
3. **Check Tasks and Deadlines:**
 - Click a task to open its details and see linked jobs.
4. **View Calendar Events:**
 - Find the **Calendar Section**.
 - Hover over events to preview details; click to edit or view full event information.

Access Training and Support:

- Use the **Quick Links** section for:
 - Training videos on YouTube.
 - SignTracker Quick Start Guide (this document)
 - [Behind the Signs Facebook Community](#)
 - Live webinar schedules.
 - Chat support for technical issues.



Pro Tips

- Refresh the dashboard mid-day to catch updates from team members.
- Bookmark training videos for specific features you use frequently.

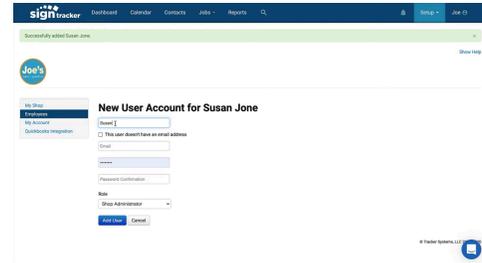
2. Setting Up and Managing Employees

What It Does

The **Employee Management** feature in SignTracker allows administrators to add, manage, and control user access. It ensures secure and efficient use of the platform's tools and resources by assigning roles and permissions tailored to team members' responsibilities.

Video: [Employee Setup](#)

Help Center Article: [Employee Set Up & Permissions](#)



Why It's Important

- **Team Collaboration:** Provides access to the tools necessary for each team member to perform their roles efficiently.
- **Data Security:** Protects sensitive features like billing, reporting, and integrations by restricting access to authorized personnel.
- **Accountability:** Tracks user actions, improving operational oversight and ensuring clarity in task ownership.

How It Helps

- **Streamlines Onboarding:** Simplifies adding new team members and setting up their access.
- **Enhances Workflow:** Role-based access ensures employees can focus on relevant tools and resources.
- **Improves Security:** Limits access to sensitive data and features, reducing the risk of unauthorized actions.

Step-by-Step Instructions

Login and Navigate to Admin Settings

1. Open the SignTracker application and log in with your credentials.
2. Navigate to the **Setup** tab.
3. Click on **Admin** and select **Employees** from the menu.

Adding a New Employee

1. Click **Add Employee**.
2. Enter the required fields:
 - **First Name** and **Last Name**

- **Job Title** (e.g., Project Manager)
- 3. Optionally, include additional contact information:
 - **Cell Phone Number**
 - **Personal Email Address**
 - **Address**
- 4. Click **Submit** to save the employee information.

Setting Up User Accounts

1. Assign the employee a **Username** (e.g., first name, last name, or email address).
2. Enter their **Email Address**.
3. Create a **Password** and share it with the employee.
 - Employees will be prompted to change their password upon first login.
4. The employee will receive a confirmation email.
 - **Tip:** Ask them to check their spam folder if the email doesn't appear.

Assigning Roles and Permissions

1. Select the role:
 - **Shop Admin:** Full permissions, including access to quotes, contracts, reports, and QuickBooks integration.
 - **Staff Person:** Limited permissions tailored to their responsibilities.
2. For **Staff Person**, toggle permissions for specific features like:
 - **Reports**
 - **Quotes**
 - **Admin Settings**
3. Save the settings to apply the permissions.

Editing and Managing Employees

1. From the **Employees** section, you can:
 - Resend confirmation instructions.
 - Confirm users who have not yet verified their accounts.
 - Update user details (e.g., name, role, or contact information).
 - Deactivate or reactivate user accounts as needed.
 - Remove employees who are no longer with the company.
2. **Note:** Removed employees will not appear in dropdown menus but will remain in the records for reference.

Understanding Permissions

- **Shop Admin:** Full access to all features, including quotes, contracts, reports, QuickBooks integration, and account billing.
- **Staff Person:** Restricted access based on assigned permissions, ensuring they only see tools relevant to their role.

Pro Tips:

- Use the employee's **email address** as their username for simplicity.
- Assign **admin roles sparingly** to prevent accidental system changes.
- Regularly review roles and permissions to ensure they align with current job responsibilities.
- Deactivate accounts promptly for employees who leave the organization to maintain security.

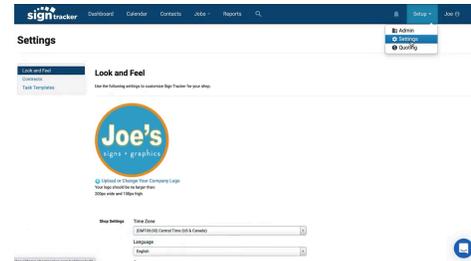
3. Configuring Shop Settings

What It Is

Shop settings in SignTracker allow you to customize critical preferences such as time zones, language, currency, and measurement units to align with your business's operational standards. These settings ensure consistency across all tools and functions within the application.

Video: [Shop settings](#)

Help Center Article: [Shop Settings](#)



Why It's Important

- **Localized Experience:** Ensures the platform reflects your geographical and operational context.
- **Improved Accuracy:** Correct time zones and currencies eliminate miscommunication or errors in scheduling and pricing.
- **Professionalism:** Configuring settings like language and currency enhances client interactions, particularly in diverse or international markets.

How It Helps

- **Streamlines Workflow:** By standardizing measurements, time zones, and currency, your team can work more efficiently without needing manual adjustments.
- **Enhances Client Communication:** Customizing language and currency ensures a professional and tailored client experience.
- **Reduces Errors:** Predefined settings help prevent inconsistencies in pricing, scheduling, and task management.

Step-by-Step Instructions

1. Login and Navigate to Settings

- Open the SignTracker application and log in with your credentials.
- Navigate to the **Setups** tab.
- Click on **Settings**.

2. Access Look and Feel

- Within the Settings menu, locate and open the **Look and Feel** section.

3. Set Up Time Zone

- Locate the **Time Zone** option.
- Select the appropriate time zone for your location from the dropdown menu.

4. Set Up Language

- Locate the **Language** option.
- Choose your preferred language for the application interface from the dropdown menu.

5. Set Up Currency

- Locate the **Currency** option.
- Select your desired currency, such as **US Dollar (USD)** or another applicable currency.
- **Note:** In the U.S., you can choose between **US Dollars** or **US Fractional Cents**, which is beneficial for sign shops or print shops that quote prices in fractions.

6. Set Up Units

- Locate the **Unit** option.
- Choose between **Imperial** or **Metric** units based on your preference.

7. Save Your Settings

- Once all preferences are configured, click on **Save**.
- Your settings will now be updated.
- **Review Preferences Regularly:** Periodically review your settings to ensure they align with current business needs or regional changes.
- **Custom Configurations:** Use the **Look and Feel** settings to customize branding elements like colors or logo for enhanced client interaction.

Pro Tips

- When setting up time zones, currency, and measurement units, confirm they match your geographical location and operational standards to avoid later adjustments.
- If your shop quotes prices in small increments (e.g., for custom materials or bulk orders), selecting **US Fractional Cents** can improve quoting accuracy.
- Customize the **Look and Feel** section by uploading your logo and adjusting platform colors to match your brand. This ensures a cohesive experience for clients when viewing documents like quotes or contracts.

4. Managing Contacts

What It Does

The Contacts feature organizes client and company details in one centralized location.

Video: [Contacts](#)

Help Center Article: [Uploading Your Contacts](#)

Why It's Important

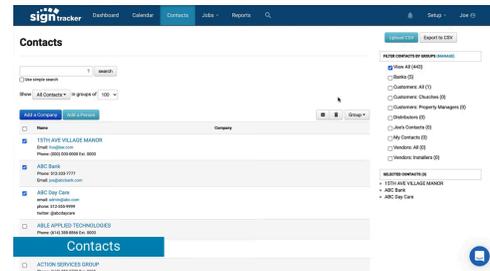
- **Efficient Management:** Simplifies tracking of multiple contacts under a single company.
- **Improved Communication:** Ensures client information is up to date for seamless interactions.

How It Helps

- Saves time by reducing redundant data entry.
- Improves client retention with detailed interaction histories.

Step-by-Step Instructions

1. **Add a New Company:**
 - Go to **Contacts > Add Company**.
 - Fill out:
 - Company Name
 - Address
 - Phone Number.
 - Click **Save**.
2. **Add Contacts:**
 - Open the company profile.
 - Click **Add Contact**.
 - Enter the contact's:
 - Name, Job Title, Email, Phone Number.
 - Click **Save**.
3. **Export Contacts:**
 - Click **Export CSV** to back up contact information or use it in other software.



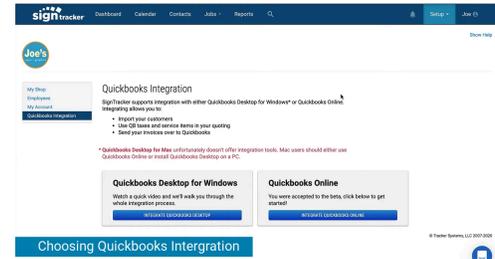
4. Importing Contacts

Option 1: Integrate with QuickBooks

If you are integrating your SignTracker account with QuickBooks, your customer data will automatically sync during the integration.

To set up the integration:

1. Go to **Setup > Admin > QuickBooks Integration**.
2. Follow the prompts to connect your QuickBooks account.



Option 2: Import Contacts via CSV

If you are not using QuickBooks, you can manually import your contacts by uploading a CSV file. Follow these steps:

1. Go to **Contacts** in your SignTracker account.
2. Click on **Upload CSV**.
3. **Select your file** or click **Download It** to use the provided template.
4. Ensure your file follows the required column format:
 - **Company Name**
 - **Contact Name**
 - **Email**
 - **Phone**
5. *Note: Not all fields need to be filled, but additional or mismatched columns may need to be removed.*
6. Match the columns in your file to SignTracker's fields when prompted.
7. Click **Upload** to complete the import process.

Pro Tips

- Group multiple contacts under a single company for complex clients (e.g., school districts).
- Regularly update contact details to maintain accurate records.

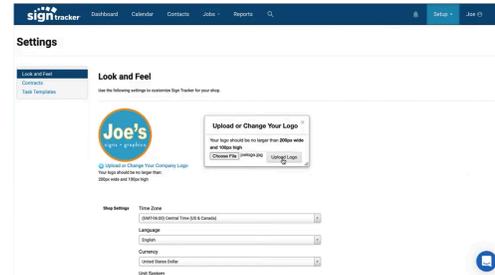
5. Uploading Your Shop Logo

What It Does

Uploading your shop's logo ensures your brand identity is reflected in all customer-facing documents, including quotes, contracts, and order forms.

Video: [Upload your logo](#)

Help Center Article: [Getting Started with SignTracker](#)



Why It's Important

- **Professional Branding:** Reinforces your company's image in client communications.
- **Consistency:** Ensures all documents feature your logo, creating a cohesive presentation.

How It Helps

- Builds trust with clients by presenting a professional and recognizable brand.
- Saves time by embedding your logo in document templates automatically.

Step-by-Step Instructions

Step 1: Access Branding Settings

1. Navigate to **Settings** from the top navigation menu.
2. Select **Company Profile** or **Branding** (depending on your version of Sign Tracker).

Step 2: Upload the Logo

1. Locate the **Upload Logo** or **Company Logo** section.
2. Click **Choose File** or **Upload Image**.
3. Select your logo file from your computer.
 - Supported formats: JPG, PNG, or SVG.
 - Recommended dimensions: 300x300 pixels or larger for best quality.
4. Click **Upload** to save the logo.

Step 3: Preview the Logo

1. Once uploaded, the logo will appear in the preview window.
2. Ensure the logo displays correctly and is not pixelated or distorted.
3. If needed, adjust the size or upload a higher-resolution version.

Step 4: Apply the Logo to Documents

1. Go to **Templates and Forms** under the **Settings** menu.
2. Open a template (e.g., quote, contract) and confirm that the logo is visible in the header.
3. Save the updated templates.

Pro Tips

- Use a transparent background (PNG format) for a cleaner appearance on forms.
- Test the logo's appearance on multiple templates to ensure it fits within the header.
- Maintain consistent branding by using the same logo file across all platforms and marketing materials.

Common Troubleshooting Tips

1. **Logo Does Not Display:**
 - **Cause:** File format not supported or upload error.
 - **Solution:** Recheck file type and size, and re-upload.
2. **Logo Is Pixelated:**
 - **Cause:** Low-resolution image.
 - **Solution:** Use a higher-quality version (minimum 300 DPI).

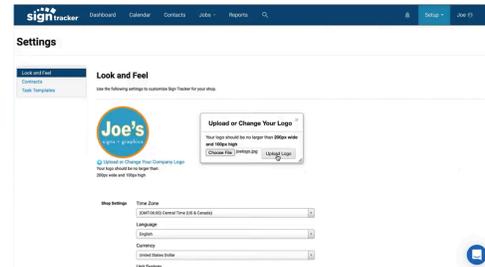
6. QuickBooks Integration Setup

What It Does

QuickBooks integration connects SignTracker with QuickBooks (Online or Desktop) to streamline financial processes, including invoicing, payment tracking, and reporting.

Video: [QuickBooks Options](#)

Help Center Articles: [QuickBooks Integration](#)



Why It's Important

- **Simplified Accounting:** Automatically sync job data with your accounting software, reducing manual entry.
- **Accurate Financial Records:** Ensures real-time updates to invoices, payments, and client records.
- **Time Savings:** Eliminates duplicate workflows by linking two essential systems.

How It Helps

- Enhances accuracy by minimizing human errors during manual entry.
- Improves cash flow management with up-to-date invoicing and payment tracking.
- Provides better financial insights through unified reporting.

Step-by-Step Instructions

Step 1: QuickBooks Online Integration

1. **Log In to Sign Tracker:**
 - Go to **Settings > Integrations > QuickBooks Online**.
2. **Connect to QuickBooks Online:**
 - Click **Connect to QuickBooks**.
 - Sign in with your QuickBooks Online credentials.
 - Authorize the connection by granting Sign Tracker access to your QuickBooks data.
3. **Sync Data:**
 - After connecting, configure your sync preferences:
 - **Customer Sync:** Choose whether to import customer data from QuickBooks into SignTracker.
 - **Invoice Sync:** Enable automatic creation of invoices in QuickBooks when jobs are closed in Sign Tracker.
 - Click **Save Settings**.

Step 2: QuickBooks Desktop Integration

1. Prepare Your System:

- Ensure QuickBooks Desktop is installed and the **Web Connector** tool is enabled.

2. Set Up Integration in SignTracker :

- Go to **Settings > Integrations > QuickBooks Desktop**.
- Download the configuration file provided (usually a **.qwc** file).

3. Configure Web Connector:

- Open QuickBooks Desktop and the Web Connector tool.
- Add the **.qwc** file to the Web Connector by clicking **Add an Application**.
- Enter your SignTracker credentials when prompted.

4. Sync Data:

- Define sync preferences (e.g., customers, invoices, payment status).
- Run the Web Connector to manually trigger the sync.

Pro Tips

- **Sync Frequency:** For QuickBooks Desktop, schedule regular syncs via the Web Connector to keep data current.
- **Data Cleanup:** Ensure customer names and job IDs are consistent in both systems to avoid duplicates.
- **User Access:** Restrict QuickBooks access to admins to maintain financial data security.
- **Test the Connection:** After setup, run a test sync with a sample job to verify that data flows correctly between systems.

Common Troubleshooting Tips

1. Error: Data Mismatch

- **Cause:** Customer names or IDs differ between SignTracker and QuickBooks.
- **Solution:** Update names in both systems to match exactly.

2. Error: Connection Failed

- **Cause:** Network or login issues.
- **Solution:** Reconnect to QuickBooks and verify your credentials.

3. Invoices Not Syncing

- **Cause:** Missing invoice settings in integration preferences.
- **Solution:** Revisit sync settings and enable invoice syncing.

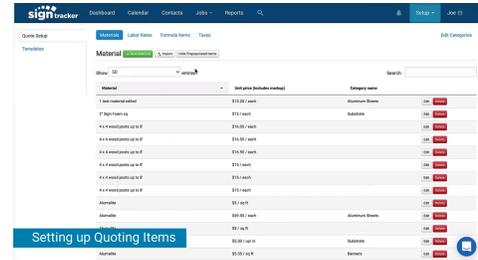
7. Quoting Item Setup

What It Does

The **Quoting Item Setup** feature in SignTracker allows users to configure materials, labor rates, and formula items. These components form the backbone of the quoting system, feeding into templates that streamline the creation of accurate, professional customer quotes.

Video: [Quoting Items Setup](#)

Help Center Article: [Setting Up Items for Quoting](#)



Why It's Important

- **Efficiency:** Automates calculations for quotes, saving time and reducing errors.
- **Accuracy:** Ensures material, labor, and pricing data are up to date and consistent across all quotes.
- **Customization:** Enables businesses to tailor quotes to their specific services and costs.

How It Helps

- **Simplifies Workflow:** Organizes and updates quoting components, ensuring seamless integration with templates.
- **Improves Profitability:** Allows precise markups for waste, handling, and labor, optimizing cost recovery.
- **Enhances Professionalism:** Produces accurate and consistent quotes, fostering client trust and satisfaction.

Materials Setup

What It Does

The **Materials Setup** feature allows users to input and organize material costs, categories, and markups, which feed into quoting templates for accurate pricing.

Why It's Important

- **Cost Management:** Tracks and updates material costs efficiently.
- **Customization:** Allows businesses to adapt pricing to their specific needs and supplier costs.
- **Time Savings:** Supports bulk imports, minimizing manual entry.

How It Helps

- **Streamlines Pricing:** Centralizes material data, ensuring uniformity in quotes.

- **Reduces Waste Costs:** Enables markups for waste and handling, protecting profitability.
- **Simplifies Updates:** Automatically syncs material cost changes with all relevant templates.

Step-by-Step Instructions

1. Navigate to the Quoting section under the Setup tab and select "Materials."
2. Review the pre-loaded materials. Click "Hide Pre-populated Items" to remove default options.
3. Import materials via a CSV file, or copy and paste directly from Excel for faster setup.
4. Assign categories (e.g., substrate, vinyl) and set unit prices.
5. Adjust markups to cover waste, handling, or additional profit.

Pro Tip: Request a CSV export of material pricing from suppliers for faster setup and accuracy.

Labor Rates Setup

What It Does

The **Labor Rates Setup** feature organizes and customizes labor costs to ensure accurate quoting based on shop-specific rates and burdens.

Why It's Important

- **Precision:** Accurately reflects labor costs, including overhead and profit margins.
- **Customization:** Tailors rates to specific job roles and tasks.
- **Scalability:** Easily imports and updates rates as your business grows.

How It Helps

- **Enhances Accuracy:** Provides consistent labor pricing across quotes.
- **Saves Time:** Allows bulk imports or quick adjustments via an intuitive interface.
- **Optimizes Pricing:** Accounts for labor burden and shop-specific costs.

Step-by-Step Instructions

1. Go to the Labor Rates section within the Quoting tab.
2. Delete pre-populated labor rates that are irrelevant to your business.
3. Adjust rates to reflect shop costs or import them via CSV for efficiency.
4. Email Sign Tracker for a "Labor Calculator" tool to determine optimal rates.

Pro Tip: Regularly review labor rates to ensure they align with current costs and market trends.

Formula Items Setup

What It Does

The **Formula Items Setup** feature defines pricing for products and services, including tiered pricing for volume discounts.

Why It's Important

- **Customization:** Enables pricing tailored to specific products and market demands.
- **Efficiency:** Reduces manual adjustments by pre-setting rates and discounts.
- **Scalability:** Supports a wide range of product types and pricing structures.

How It Helps

- **Streamlines Quotes:** Automatically applies pricing tiers based on quantities.
- **Reduces Errors:** Ensures consistent and accurate pricing across quotes.
- **Enhances Client Trust:** Presents professional and transparent pricing options.

Step-by-Step Instructions

1. Navigate to the Formula Items section under Quoting.
2. Review the list of pre-loaded formula items, deleting those that are irrelevant.
3. Add custom items, such as banners or vinyl wraps, and set appropriate pricing.
4. Define volume-based tiered pricing for automated discount adjustments.

Pro Tip: Use formula items to establish consistent pricing for commonly sold products, improving quoting speed and accuracy.

Updating and Maintaining Templates

What It Does

Updating templates ensures that changes to materials, labor, or formula items are automatically reflected in all relevant quotes.

Why It's Important

- **Consistency:** Keeps all quotes aligned with the latest cost data.
- **Accuracy:** Reduces the risk of outdated pricing errors.
- **Flexibility:** Allows businesses to adapt templates to new products or services.

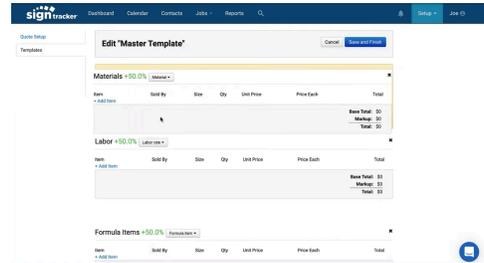
How It Helps

- **Saves Time:** Centralized updates eliminate the need to revise individual templates.
- **Improves Accuracy:** Ensures quotes reflect real-time costs.
- **Simplifies Management:** Provides a single source of truth for quoting data.

8. Quoting Templates Setup

What It Does

The Quoting Templates feature in SignTracker simplifies the process of creating detailed, accurate, and customizable quotes for various sign projects. By utilizing master templates and product-specific templates, users can streamline the quoting process, ensure consistency, and reduce manual errors.



Video: [Sign Tracker Quoting Templates](#)

Help Center Article: [Re-using Your Quote Worksheets](#)

Why It's Important

- **Efficiency:** Saves time by predefining categories, markup rates, and standard line items.
- **Accuracy:** Ensures consistent pricing and reduces the risk of errors in calculations.
- **Flexibility:** Allows for customization of quotes based on specific client needs or project requirements.

How It Helps

- **Streamlines Quoting:** Provides a structure for quickly generating quotes for common products like banners or custom signs.
- **Supports Customization:** Enables on-the-fly adjustments without impacting master templates or product-specific templates.
- **Improves Client Communication:** Offers clear, professional quotes that can be converted seamlessly into contracts.

Step-by-Step Instructions

1. **Set Up a Master Template:**
 - Navigate to **Setup > Settings > Quoting Templates**.
 -
 - Open the **Master Template** to configure foundational settings.
 - Define categories (e.g., Materials, Labor, Formula Items).
 - Set markup rates (e.g., 50% for materials, 0% for labor if entered at retail cost).
 - Include additional categories like **Special Order Items**, **Subcontracting**, or **Extras** for permits, site surveys, or engineering drawings.
 - Save changes to establish the base structure.

2. **Create Product-Specific Templates:**
 - Select **New Template** to create a product template (e.g., 4x8 Banner).
 - Add the following components:
 - **Materials:** Include items like banner material, grommets, or hem tape.
 - **Labor:** Estimate time for tasks like design, assembly, or installation.
 - **Extras:** Add line items for optional services, such as permits or rush fees.
 - Customize descriptions for each line item to provide clarity for clients.
 - Assign categories to help organize templates for future use.
 - Save the template under a descriptive name for easy identification.
3. **Using Templates in Jobs:**
 - Open a job and navigate to the **Quotes** tab.
 - Select a pre-existing template or create a custom quote by modifying a template on the fly.
 - Adjust line items, quantities, and markup rates as needed without affecting the original template.
 - Add job-specific details, such as dimensions or notes for special requirements.
4. **Generate a Quote:**
 - Review the completed quote for accuracy.
 - Save and preview the quote, then email it directly to the client or download it as a PDF for offline sharing.
 - Add taxes or discounts based on client-specific circumstances.
5. **Convert Quotes to Contracts:**
 - Once approved by the client, convert the quote into a contract within the job.
 - Add final terms or notes, and generate a PDF to send for client signature.

Pro Tips

- **Master Template Safety:** Changes to individual templates won't affect the master template, preserving its integrity.
- **Custom Categories:** Create categories tailored to your specific business needs, like subcontractor labor or rush fees.
- **Break Down Costs:** For transparency, itemize costs such as materials, labor, and extras. This helps clients understand the value of your services.
- **Flexibility with Discounts:** Apply discounts or commissions directly in templates for consistency across quotes.
- **Streamlined Approvals:** Mark approved quotes to trigger seamless integration with QuickBooks, automating the invoicing process.

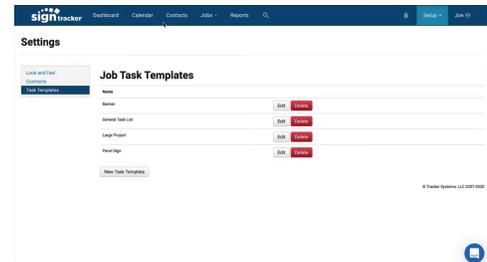
9. Task Template Setup

What It Does

The **Task Template Setup** feature in SignTracker allows users to create and manage templates for recurring tasks. These templates standardize workflows, ensuring consistency and efficiency across all jobs.

Video: [Task Template Setup](#)

Help Center Article: [Task Template Setup](#)



Why It's Important

- **Consistency:** Provides a standardized process for repetitive tasks, improving accuracy and reducing errors.
- **Time Savings:** Eliminates the need to manually create tasks for similar jobs.
- **Team Collaboration:** Pre-assigns tasks to team members, streamlining job management.

How It Helps

- **Streamlines Workflow:** Automates task creation, ensuring all necessary steps are included for every job type.
- **Improves Communication:** Assigns tasks with due dates and notes to keep team members aligned.
- **Enhances Flexibility:** Allows on-the-fly adjustments to task templates within individual jobs without affecting the original template.

Step-by-Step Instructions It

Login and Navigate to Settings

1. Open the Sign Tracker application and log in with your credentials.
2. Go to the **Setup** tab.
3. Click on **Settings**.

Access Task Templates

1. In the **Settings** menu, locate and select the **Task Templates** section.
2. You also have the option of setting up a task template in a new job.
3. Review existing templates or start creating a new one.

Creating a Task Template

1. Click **New Task Template**.
2. Enter a **Template Name** (e.g., "Panel Sign Tasks").
3. Add tasks one at a time:
 - Specify the task name (e.g., "Meet with Customer").
 - Assign it to a team member (optional).
 - You can also pre-assign tasks and save as a new template.
 - Add a description to provide details or context (optional).
4. Save the template.
5. Add additional tasks as needed, rearranging them by dragging and dropping if required.

Editing an Existing Template

1. Open a task template from the list.
2. Modify tasks, descriptions, or assignees.
3. Drag and drop tasks to reorder them.
4. Save changes to update the template.

Using Task Templates in Jobs

Applying a Template

1. Open an existing job in the **Jobs** tab.
2. Navigate to the **Tasks** section.
3. Select a template from the list to apply it to the job.
4. Assign team members and set due dates for each task.
5. Add notes if necessary (e.g., "Waiting for customer logo").

Adding or Deleting Tasks

1. Add additional tasks directly to the job if required (e.g., "Order Materials").
2. Delete tasks that are no longer relevant without affecting the original template.

Saving Updated Templates

1. If you make changes to a task list within a job, save it as a new or updated template:
 - Click **Save Task Template** within the job.
 - Choose to update an existing template or create a new one.

Pro Tips

- Use templates for both simple projects (e.g., banners) and complex ones (e.g., electric signs with 25+ tasks).
- Assign default team members to streamline task delegation for recurring roles.

10. Understanding and Customizing the Job Flow Board

What It Does

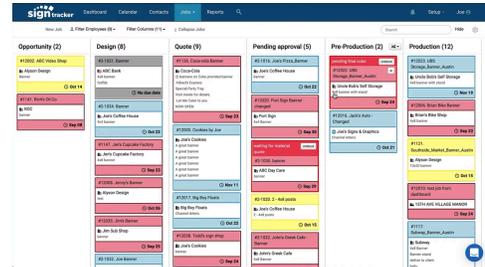
The Job Flow Board visualizes job progress through customizable stages of production.

Video: [SignTracker Job Flow](#)

Video: [Job Flow Column Setup](#)

Video: [Job Flow Board](#)

Webinar: [Job Management](#)



Why It's Important

- **Improved Visibility:** Tracks job statuses in real time.
- **Customizable Workflows:** Adapts to the specific needs of your business.

How It Helps

- Increases efficiency by highlighting priority jobs.
- Reduces delays by identifying bottlenecks.

Step-by-Step Instructions

1. **Access the Job Flow Board:**
 - Click **Jobs > Job Flow Board**.
 -
2. **Understand Columns:**
 - Each column represents a production stage (e.g., Quoting, Pre-Production, Production).
3. **Customize Columns:**
 - Double-click a column title to rename it.
 - Click the dropdown to add, delete, or reorder columns.
4. **Move Jobs Between Stages:**
 - Drag and drop jobs to update their stage.
 - Confirm changes to update system-wide records.
5. **Filter Jobs:**
 - Use the filter options to view jobs by:
 - Assignee
 - Due Date
 - Stage of Production.

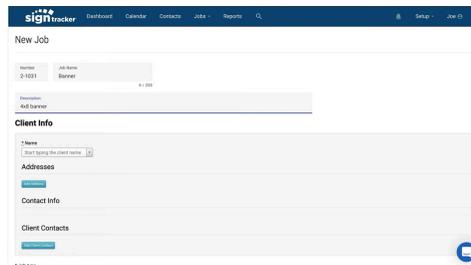
Pro Tips

- Use clear, descriptive column names to improve team communication.
- Regularly review and update stages to reflect workflow changes.

11. Job Creation and Management

What It Does

The Job Creation and Management feature in Sign Tracker allows users to initiate, track, and oversee individual jobs through their lifecycle. From initial customer interactions to task management and completion, this feature serves as a centralized hub for organizing all job-related activities, files, and communications.



Video: [Setting Up a New Job](#)

Video: [Inside Your Job](#)

Video: [SignTracker Job Management](#)

Webinar: [Job Management](#)

Why It's Important

- **Centralized Information:** Keeps all job details, files, updates, and communications in one place for easy access.
- **Streamlined Workflow:** Ensures that all steps, from quotes to completion, are documented and accessible.
- **Customer Retention:** Archived jobs retain valuable client information, making follow-ups seamless if clients return in the future.

How It Helps

- **Enhances Collaboration:** Provides a single source of truth for sales, production, and project management teams.
- **Reduces Errors:** Tracks all job-related activities to minimize oversight or miscommunication.
- **Improves Efficiency:** Enables tracking of all tasks, quotes, and communications within one job folder.

Step-by-Step Instructions

1. **Starting a New Job:**
 - Navigate to the **Job Flow Board**, **Job List**, or use the **New Job** dropdown menu.
 - Enter the following details:
 - **Job Name:** Use clear identifiers (e.g., "ABC Bank – Multi-Sign Project").
 - **Customer:** Start typing the client's name to auto-populate or add new contact information.
 - **Description:** Include details like project scope or special requirements.
 - **Contact:** Link the job to one or multiple contacts at the client's company.

- **Job Type:** Specify whether it's a product or service.
 - **Assign Team Members:** Add project managers or sales reps (optional for smaller shops).
 - **Due Date:** Add a deadline if known; this can be updated later.
 - **Location:** Input a delivery, install, or pickup location.
- 2. **Managing Jobs:**
 - **Track Progress:**
 - Jobs automatically appear in the first column of the Job Flow Board.
 - Move jobs across stages by dragging them to the next column.
 - **Edit Job Details:**
 - Open the job card to update information like due dates, descriptions, or assigned personnel.
 - **Attach Files:**
 - Upload proofs, surveys, or client approvals directly to the job using drag-and-drop or by navigating to your computer's files.
 - Use the browser on your smartphone to upload photos or documents from the field.
- 3. **Task Management:**
 - Assign tasks using templates or create new tasks specific to the job.
 - Tasks automatically appear in the calendar and task list for tracking.
 - Update task progress as work is completed.
- 4. **Using Notes:**
 - Add time-stamped notes to record approvals, emails, or project updates.
 - Copy and paste customer communications directly into the notes for quick reference.
- 5. **Quoting and Contracts:**
 - Create quotes and convert them into contracts directly within the job.
 - Use templates for consistent pricing and branding.
 - Review detailed webinars for advanced quoting setup.
- 6. **Archiving and Cloning Jobs:**
 - Archive completed or unsuccessful jobs for future reference.
 - Clone existing jobs to create similar projects quickly.

Pro Tips

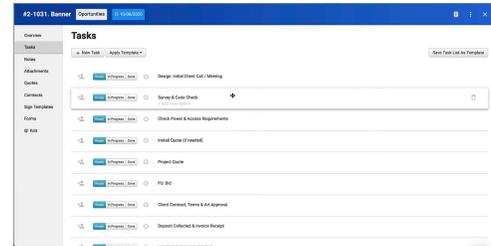
- **Consistent Naming:** Use a standardized format for job names to simplify searching (e.g., Client Name – Sign Type).
- **Utilize Attachments:** Immediately upload field photos and notes to avoid losing critical information.
- **Stay Organized:** Regularly review job statuses and move completed jobs to the Archived column.
- **Manage Holds:** Use the "Hold" feature to flag jobs pending permits, approvals, or other dependencies.
- **Explore Templates:** Take advantage of the built-in sign templates and forms for tasks like client surveys, change orders, or landlord approvals.

12. Task Management and Templates

What It Does

Tasks break jobs into actionable steps, while templates streamline repetitive task creation.

Video: [Job Tasks](#)



Why It's Important

- **Enhanced Organization:** Clearly defines responsibilities and deadlines for each team member.
- **Time Savings:** Reduces repetitive data entry with reusable templates.

How It Helps

- Prevents overlooked steps by standardizing task lists.
- Improves time management by assigning clear due dates and priorities.

Step-by-Step Instructions

1. **Create a Task Template:**
 - Navigate to **Settings > Task Templates**.
 - Click **New Template**.
 - Enter the template name (e.g., "Banner Production Tasks").
 - Add tasks sequentially:
 - **Task Name:** Describe the step (e.g., "Client Approval").
 - **Assigned Role:** Choose who typically performs this task.
 - **Estimated Duration:** Provide a timeframe (e.g., 2 days).
 - Save the template.
2. **Assign Tasks to a Job:**
 - Open a job and navigate to the **Tasks** tab.
 - Click **Apply Template** and select the appropriate task template.
 - Adjust individual task due dates and assignees if necessary.
3. **Track Task Progress:**
 - Open the **Tasks View** from the navigation menu.
 - Use filters to view tasks by:
 - Assignee
 - Status (e.g., Open, In Progress, Completed).
 - Update task status as work progresses.

Pro Tips

- Build templates for specific project types (e.g., "Channel Letters" or "Vehicle Wraps").
- Assign default roles for each task to speed up job setup.

13. Quoting and Contract Management

What It Does

The Quoting and Contract Management feature in Sign Tracker streamlines the creation, customization, and delivery of quotes and contracts to clients. It ensures that all pricing, terms, and branding are accurate and professional, while allowing flexibility to meet individual business needs.

Video: [SignTracker Quoting](#)

Video: [Contract Setup](#)

Webinar: [Quoting Jobs in SignTracker](#)

Item	Sold By	Size	Qty	Unit Price	Price Each	Total
Banner (3x6) White	sq ft	4 x 8	1	2.00	0.0025	0.0025
Hem Tape	in ft	1 x 1	24	1.00	1.00	24.00
Grommets	each	1 x 1	12	0.50	0.50	6.00

Item	Sold By	Size	Qty	Unit Price	Price Each	Total
Assembly	each	1	1	60.00	60.00	60.00

Summary	
Base Total:	\$30,000.00
Markup:	\$15,000.00
Total:	\$45,000.00

Why It's Important

- **Professional Presentation:** Enhances your brand image with consistent, polished documents.
- **Revenue Accuracy:** Automates precise calculations for materials, labor, and other costs.
- **Customization:** Allows for tailored terms, titles, and branding to match your business requirements.

How It Helps

- **Boosts Sales:** Quickly generates professional quotes, improving response times and client satisfaction.
- **Reduces Errors:** Ensures accurate pricing and terms, minimizing misunderstandings.
- **Saves Time:** Simplifies repetitive tasks with customizable templates.

Step-by-Step Instructions

1. **Set Up Contract Look and Feel:**
 - Navigate to **Setup > Settings > Contract Settings**.
 - Adjust the following:
 - **Title:** Customize the contract title (e.g., "Sign Quote" to "Sign Bid").
 - **Deposit Terms:** Change the default deposit requirement (e.g., 50% or 0%).
 - **Terms:** Replace the default terms with your preferred text by copying and pasting your custom content.
 - **Logo:** Upload and resize your logo to align with your branding.

2. **Create a Quote:**
 - Open a job and navigate to the **Quotes** tab.
 - Click **New Contract** and choose a template:
 - **Master Template:** Build a custom quote from scratch.
 - **Prebuilt Template:** Use a standard template for recurring services or products (e.g., banners).
 - Add line items:
 - **Materials**
 - **Labor**
 - **Formula Items** (predefined services or products).
3. **Customize the Quote:**
 - Adjust quantities, markup percentages, and descriptions for each line item.
 - Include detailed terms and conditions if not already preloaded.
4. **Send the Quote:**
 - Save and preview the completed quote.
 - Send it to the client via email using the **Email Quote** option.
 - Alternatively, download the quote as a PDF for offline sharing.
5. **Converting Quotes to Contracts:**
 - After client approval, convert the quote into a contract within the same job.
 - Edit or add any additional terms before finalizing and sending the contract for signature.

Pro Tips

- **Regular Updates:** Periodically review and update material and labor rates to reflect current costs.
- **Detailed Descriptions:** Use clear and concise language to minimize client misunderstandings.
- **Consistent Branding:** Ensure your logo and terms are aligned with your business identity for all documents.
- **Flexible Terms:** Customize deposit requirements and terms to match your standard business practices.
- **Streamline Revisions:** Save commonly used templates for quick access to frequently quoted items or services.

14. Calendar and Scheduling

What It Does

Manages job schedules, team meetings, and deadlines through a built-in calendar.

Video: [Calendar](#)

Why It's Important

- **Enhanced Planning:** Keeps everyone on the same schedule.
- **Deadline Management:** Reduces missed deadlines by setting automated reminders.



How It Helps

- Improves coordination between departments.
- Helps avoid overlapping deadlines or meetings.

Step-by-Step Instructions

1. **Add Calendar Events:**
 - Open the **Calendar View**.
 - Click a date to create a new event.
 - Enter:
 - Event Name
 - Date and Time
 - Participants (team members or clients).
 - Save to send email reminders to participants.
2. **Reschedule Tasks:**
 - Drag and drop tasks or jobs to new dates in the calendar view.
 - Confirm changes to update all linked records.
3. **Filter Calendar Views:**
 - Use the dropdown to view:
 - Personal Events
 - Team Events
 - Job Deadlines.

Pro Tips

- Color-code event categories (e.g., "Client Meetings" in blue, "Production Deadlines" in red).
- Print weekly views for team briefings.

15. File and Document Management

What It Does

Allows users to attach, tag, and manage files related to specific jobs.

Video: [Uploading your job attachments](#)

Video: [Job Attachments and Organization](#)

Why It's Important

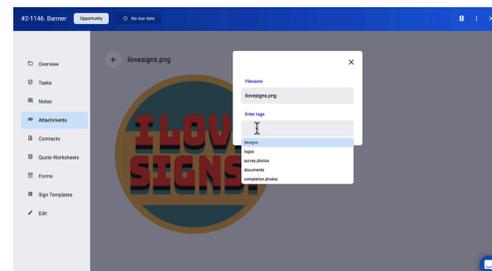
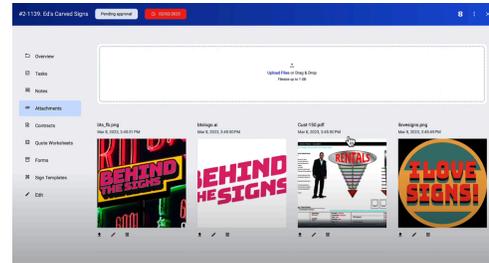
- **Centralized Documentation:** Keeps all project files in one accessible location.
- **Organized Workflow:** Allows tagging and filtering for quick retrieval.

How It Helps

- Saves time by making files easily searchable.
- Enhances collaboration by ensuring everyone uses the correct versions.

Step-by-Step Instructions

1. **Upload Files to a Job:**
 - Open a job and click the **Attachments** tab.
 - Drag and drop files or use the **Upload File** button.
 - Name the file and add relevant tags (e.g., "Design Proofs", "Permits").
2. **Organize Files:**
 - Use tags to categorize files by type or purpose.
 - Search files by tag to quickly locate what you need.
3. **Download or Share Files:**
 - Click on a file to download or share it via email.



Supported File Formats for Uploads

Image Files

- **JPG/JPEG:** Commonly used for high-quality images.
- **PNG:** Supports transparency, ideal for logos or design elements.
- **GIF:** Limited animation or static images.
- **SVG:** Scalable vector graphics for design files.

Document Files

- **PDF:** Standard for contracts, permits, or proofs.
- **DOC/DOCX:** Microsoft Word files for editable documents.
- **TXT:** Plain text files.

Spreadsheet Files

- **XLS/XLSX:** Microsoft Excel files for data and pricing sheets.
- **CSV:** Used for importing/exporting bulk data like contacts.

Design Files

- **AI:** Adobe Illustrator files (check for optional support or required plugin).
- **EPS:** Vector format often used in signage design.
- **PSD:** Adobe Photoshop files for raster images (limited functionality).

Other Formats

- **ZIP/RAR:** Compressed folders for multiple file uploads.
- **MP4/MOV:** Video files for customer presentations or project references (if applicable).
- **DXF/DWG:** CAD files for technical drawings (optional, based on system features).

Pro Tips

- Tag files consistently for efficient searching.
- Regularly review and delete outdated files to maintain organization.

16. Working with Forms and Work Orders

What It Does

The Forms Management feature in SignTracker provides a comprehensive library of templates for work orders, surveys, change orders, and more. These templates streamline documentation and communication processes, allowing users to quickly generate, complete, and manage forms directly within a job.

Video: [Forms and Work Orders](#)

Why It's Important

- **Efficiency:** Reduces the time required to create and manage various forms by providing pre-designed templates.
- **Accuracy:** Ensures all required information is captured and saved securely within a job.
- **Organization:** Centralizes form management, keeping all related documentation easily accessible.

How It Helps

- **Streamlines Workflow:** Templates cover a wide range of needs, from work orders to subcontractor agreements, ensuring every step is documented.
- **Improves Accuracy:** Pre-defined fields and templates minimize the risk of missing critical information.
- **Supports Flexibility:** Forms can be completed on different devices, including desktops, tablets, or even printed for manual completion.

Step-by-Step Instructions

1. **Accessing Templates:**
 - Navigate to the Forms section within a job.
 - Browse the available templates in the form bank. These templates act as a base for creating new forms.
2. **Using a Template:**
 - Select a template from the list (e.g., Commercial Sign Work Order).
 - Open the template and fill out the required fields in your browser.
3. **Saving Forms:**
 - If filling out the form in your browser, download it to your computer before clicking "Submit."
 - **Note:** Submitting directly from the browser may not save the data to the job due to browser compatibility issues with Adobe Acrobat.
 - Save the completed form to your job under "Completed Forms" for future reference.

4. **Editing and Managing Forms:**
 - Open any form from the "Completed Forms" section.
 - Make changes as needed, then re-save or submit the updated form.
 - Delete forms from your local device after uploading to avoid duplication or confusion.
5. **Exporting and Printing Forms:**
 - Download forms in their original or filled-out state.
 - Print forms for manual use or offline completion if needed.

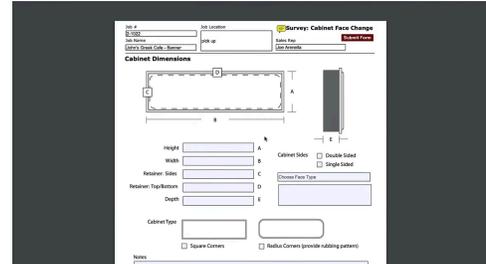
Pro Tips

- **Browser Compatibility:** For best results, use a PDF reader to fill out forms downloaded to your device. Submit the completed form after saving to avoid data loss.
- **Attach Supporting Documents:** For fieldwork, take photos of handwritten notes or measurements and upload them directly to the job.
- **Use Descriptions:** Each template includes a description to clarify its purpose. Review these descriptions before selecting a template to ensure you're using the correct form.
- **Field Usage:** Use forms like Survey Sheets for on-site work and attach them immediately to jobs to avoid losing critical information.
- **Stay Organized:** Regularly review the form library to familiarize yourself with all available templates, such as engineering requests, subcontractor agreements, and change orders.

17. Customizing Forms

What It Does

The **Customizing Forms** feature allows you to create or modify templates for quotes, contracts, and other customer-facing documents. You can incorporate branding elements, adjust layouts, and automate content fields to ensure professional and consistent presentation.



Video: [Forms and Work Orders](#)

Why It's Important

- **Brand Consistency:** Ensures all customer-facing documents reflect your business branding.
- **Efficiency:** Automates commonly used fields, reducing repetitive work.
- **Professionalism:** Improves client trust and perception with polished, tailored forms.

How It Helps

- Saves time by using prebuilt templates for recurring tasks.
- Reduces errors by automating calculations and standardizing document layouts.
- Improves communication by clearly outlining terms, pricing, and details in well-organized formats.

Step-by-Step Instructions

Step 1: Access the Forms Section

1. Navigate to **Settings > Templates and Forms**.
2. Select the type of form you want to customize:
 - **Quote Templates**
 - **Contract Templates**
 - **Order Forms**
 - **Production Checklists**

Step 2: Customize an Existing Template

1. Click on the template you want to edit.
2. Adjust the following:
 - **Header:** Add your company logo, business name, and contact details.
 - **Footer:** Include disclaimers, terms, or a thank-you message.
 - **Fields:** Modify or add fields such as customer name, job description, and pricing details.
3. Use drag-and-drop functionality (if available) to rearrange sections for clarity.

Step 3: Create a New Template

1. Click **New Template**.
2. Choose a base template or start from scratch.
3. Add the following elements:
 - **Logo and Branding:** Upload your logo and set color themes.
 - **Dynamic Fields:** Use placeholders (e.g., {{CustomerName}}, {{JobTotal}}) for automated data entry.
 - **Sections:** Create areas for descriptions, line items, totals, and notes.
4. Save the template and name it for easy identification.

Step 4: Apply the Template

1. Open a job or quote.
2. Click **Use Template** and select the desired form.
3. Review and edit any placeholders or additional notes.
4. Save or send the form directly to the client.

Pro Tips

- **Test Before Use:** Generate a test quote or contract using the template to ensure all placeholders populate correctly.
- **Update Regularly:** Review templates quarterly to ensure pricing, branding, and terms are up to date.
- **Standardize Layouts:** Use consistent formats across all templates to make them easily recognizable by clients.

Advanced Features

1. **Add Dynamic Calculations:** Automate pricing by including formulas for line items, discounts, and taxes.
2. **Multi-Language Support:** Create templates in different languages if serving a diverse client base.
3. **Custom Fields:** Add unique fields specific to your business, such as permit numbers or production specifications.

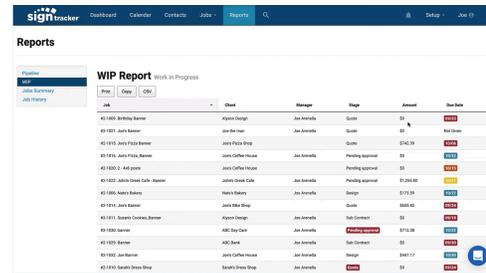
Common Troubleshooting Tips

1. **Fields Not Populating:**
 - **Cause:** Incorrect placeholder names.
 - **Solution:** Double-check placeholder formatting (e.g., {{FieldName}}) against Sign Tracker's field list.
2. **Formatting Issues:**
 - **Cause:** Template not optimized for print or PDF export.
 - **Solution:** Preview forms before finalizing to ensure layout consistency.

18. Reports Overview

What It Does

The Reports feature in SignTracker provides detailed insights into various aspects of your business operations. It includes four primary reports: Pipeline, Work in Progress, Job Summary, and Job History. These reports are essential for tracking job statuses, managing timelines, and making data-driven decisions.



The screenshot shows the SignTracker Reports interface. The top navigation bar includes Dashboard, Calendar, Contacts, Jobs, Reports, and a search icon. The Reports section is active, displaying a 'WIP Report' for 'Work in Progress'. The table below lists various jobs with columns for Job ID, Client, Manager, Stage, Amount, and Due Date. The jobs are color-coded by status: green for 'Quote', yellow for 'Pending Approval', and red for 'Design'.

Job	Client	Manager	Stage	Amount	Due Date
41-1000 - Shipping Boxes	Philly Design	Jan Anzalone	Quote	\$0	2024-01-15
41-1001 - Jan's Boxes	Joe The Mail	Jan Anzalone	Quote	\$0	Not Given
41-1010 - Jan's Pizza Boxes	Jan's Pizza Shop	Jan Anzalone	Quote	\$742.00	2024-01-15
41-1011 - Jan's Pizza Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1020 - J. Jan Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1021 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1022 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1023 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1024 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1025 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1026 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1027 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1028 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1029 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1030 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1031 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1032 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1033 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1034 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1035 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1036 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1037 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1038 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1039 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1040 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1041 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1042 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1043 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1044 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1045 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1046 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1047 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1048 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1049 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1050 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1051 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1052 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1053 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1054 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1055 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1056 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1057 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1058 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1059 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1060 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1061 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
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41-1063 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1064 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1065 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1066 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1067 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1068 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1069 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1070 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1071 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1072 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1073 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
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41-1075 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1076 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1077 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1078 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1079 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1080 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1081 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1082 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1083 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1084 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1085 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
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41-1091 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1092 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1093 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1094 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1095 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1096 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1097 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1098 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1099 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15
41-1100 - Jan's Boxes - Boxes	Jan's Coffee House	Jan Anzalone	Pending Approval	\$0	2024-01-15

Video: [Reports](#)

Why It's Important

- **Visibility:** Offers a clear view of job progress and historical data.
- **Efficiency:** Identifies bottlenecks and streamlines workflow management.
- **Accountability:** Tracks sales and production performance metrics.

How It Helps

- **Pipeline Management:** Monitors jobs in the early stages of the Job Flow Board to ensure nothing is overlooked.
- **Progress Tracking:** Keeps teams aligned by providing real-time updates on active jobs.
- **Historical Insights:** Allows for performance reviews and identification of recurring issues.

Step-by-Step Instructions

1. **Access the Reports Tab:**
 - Navigate to the Reports tab in the top navigation menu.
 - If you don't see this option, check with your administrator to enable access.
2. **View Pipeline Report:**
 - Lists all jobs in the first stage of the Job Flow Board (e.g., Opportunity, Open Job).
 - Details include company name, client, sales rep, quoted amount, and quote status.
3. **Review Work in Progress:**
 - Tracks jobs actively moving through production stages.
 - Provides details such as job name, client, project manager, stage of production, dollar amount, and due date.
4. **Explore Job Summary:**
 - Displays job descriptions, client details, project manager, sales rep, creation date, and due date.

- Offers a quick overview of job specifics for better planning.
- 5. **Analyze Job History:**
 - Records the timeline of a job's progression through production stages.
 - Useful for identifying delays or inefficiencies in the workflow.
- 6. **Export Data:**
 - Print reports or export them as CSV files for further analysis in Excel or Google Sheets.
 - Manipulate the data to create custom insights for your team.

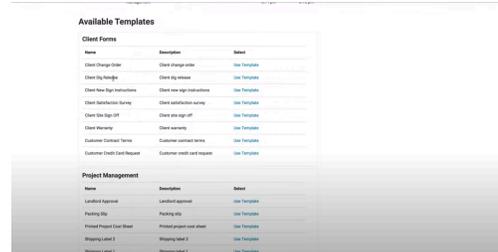
Pro Tips

- **Customize Columns:** Adjust column titles in the Job Flow Board to align with your terminology for better clarity in reports.
- **Track Trends:** Use historical data from Job History to forecast future workloads or identify peak periods.
- **Leverage Exported Data:** Import CSV files into other tools for advanced reporting or sharing with stakeholders.

19. Sign Design Templates

What It Does

Sign Design Templates in SignTracker are a collection of pre-made, vectorized sign schematics that serve as a foundation for creating professional and customizable sign designs. These templates can be edited in popular design software like Adobe Illustrator or FlexiSign, enabling users to tailor them to specific client needs.



Video: [Work Orders, Forms & Sign Design Templates](#)

Why It's Important

- **Efficiency:** Saves time by providing ready-to-use designs that reduce the need for creating layouts from scratch.
- **Customization:** Allows users to edit live text and vector elements to meet specific project requirements.
- **Versatility:** Includes a wide range of templates suitable for various sign types and projects.

How It Helps

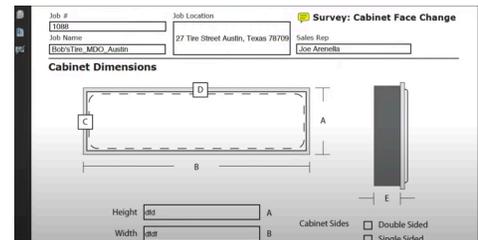
- **Boosts Productivity:** Provides a starting point for sign designs, helping designers focus on client-specific modifications rather than creating schematics.
- **Ensures Professional Results:** Templates are created with professional layouts, enhancing the quality of final designs.
- **Supports Diverse Needs:** Offers templates for banners, cabinet signs, channel letters, vehicle magnets, and more.

Step-by-Step Instructions

1. **Accessing Sign Templates:**
 - Open a job in SignTracker.
 - Navigate to the **Resources** section on the left-hand menu.
 - Click on **Sign Templates** to browse the available collection.

2. Choosing a Template:

- Review the templates organized by type:
 - **Banners:** Different sizes and layouts.
 - **Cabinet Signs:** Wall-mounted and freestanding options.
 - **Channel Letters:** Schematics for electric channel letter signs.
 - **Monuments:** Designs for monument signs, including MDO and post panels.
 - **Vehicle Magnets:** Templates for customizable vehicle signs.
- Select a template that aligns with your project needs.



3. Downloading and Editing:

- Click to download the desired template.
- Open the file in your design software (e.g., Adobe Illustrator, FlexiSign, or CorelDRAW).
- Customize text, colors, and schematics to suit the specific job requirements.

4. Uploading the Edited Template:

- Once edited, save the file locally.
- Upload the updated design back to the job's **Attachments** section for team access.

Pro Tips

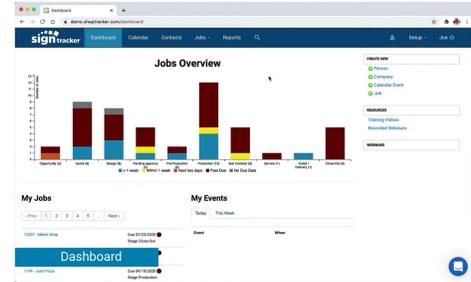
- **Explore the Collection:** Take time to familiarize yourself with the available templates to identify ones that fit your typical projects.
- **Utilize Vector Elements:** All templates are vectorized, enabling easy resizing and modification without quality loss.
- **Combine Templates:** For complex projects, mix elements from multiple templates to create a cohesive design package.
- **Integrate with Workflow:** Use templates in conjunction with job-specific tasks, ensuring the design process aligns seamlessly with production.

20. Top 10 SignTracker Tips for Maximum Efficiency

This section provides actionable tips to help you get the most out of SignTracker. These strategies are designed to optimize your workflows, save time, and improve your team's productivity.

1. Start Every Day with the Dashboard

- **Why:** The dashboard provides a snapshot of your entire operation, including job progress, tasks, and deadlines.
- **Step-by-Step Instructions:**
 1. Log in to SignTracker and review the **Job Flow Board Summary**.
 2. Prioritize overdue tasks and upcoming deadlines.
 3. Use the **Tasks Panel** to assign or reassign items based on daily priorities.
- **Pro Tip:** Bookmark the dashboard in your browser for one-click access.



2. Use Consistent Naming Conventions

- **Why:** Standardized names make it easier to search for jobs, clients, and files.
- **Step-by-Step Instructions:**
 - Format job titles like: **Client Name – Project Type – Date** (e.g., ABC Signs – Channel Letters – 01/15/25).
 - Apply consistent labels to files and tags.
- **Pro Tip:** Train your team on naming conventions to ensure consistency across the organization.

3. Leverage Task Templates

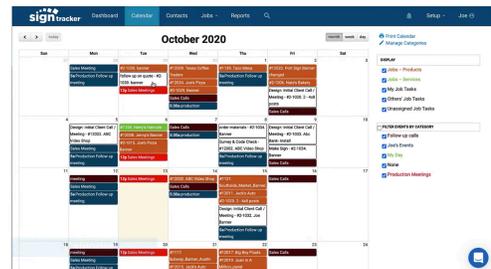
- **Why:** Task templates save time and ensure no step is missed in recurring workflows.
- **Step-by-Step Instructions:**
 1. Navigate to **Settings > Task Templates**.
 2. Create templates for common projects (e.g., "Vinyl Wrap Workflow").
 3. Apply templates to new jobs and adjust deadlines as needed.
- **Pro Tip:** Review task templates quarterly to reflect any process changes.

4. Regularly Update Contact Records

- **Why:** Accurate client information ensures smooth communication and repeat business.
- **Step-by-Step Instructions:**
 - Open the **Contacts** section and update client details after every interaction.
 - Use tags like **VIP** or **High Priority** for key clients.
- **Pro Tip:** Import a fresh list of contacts quarterly to sync with marketing or invoicing systems.

5. Color-Code Calendar Events

- **Why:** Color coding makes it easy to differentiate between types of events.
- **Step-by-Step Instructions:**
 1. Go to the **Calendar View**.
 2. Assign colors to categories:
 - Red for deadlines.
 - Blue for client meetings.
 - Green for internal check-ins.
 3. Apply these colors when creating events.
- **Pro Tip:** Print a weekly view of the calendar.



6. Automate Job and Quote Creation

- **Why:** Automating repetitive tasks saves time and reduces errors.
- **Step-by-Step Instructions:**
 1. Use job templates with pre-filled fields like job stages, tasks, and deadlines.
 2. Set default pricing structures for quotes in **Templates and Forms**.
- **Pro Tip:** Create formulas for common pricing scenarios (e.g., vinyl banners).

7. Sync Frequently with QuickBooks

- **Why:** Frequent syncing ensures financial data is accurate and up to date.
- **Step-by-Step Instructions:**
 - For **QuickBooks Online**: Enable auto-sync in **Settings > Integrations**.
 - For **QuickBooks Desktop**: Run the Web Connector daily.
- **Pro Tip:** Schedule a regular time for syncing, such as at the end of each workday.

8. Attach Files Immediately

- **Why:** Attaching files to jobs ensures the team has access to critical documents.
- **Step-by-Step Instructions:**
 1. Open the job in SignTracker.
 2. Click the **Attachments** tab and upload files like proofs, permits, or approvals.
 3. Use descriptive tags (e.g., "Design Proof").
- **Pro Tip:** Upload updated files as separate versions to keep a clear history.

9. Conduct Weekly Production Meetings

- **Why:** Regular meetings align the team and address bottlenecks.
- **Step-by-Step Instructions:**
 1. Use the **Job Flow Board** as a visual aid during meetings.
 2. Review each column to identify delayed or high-priority jobs.
 3. Assign action items directly from the board.
- **Pro Tip:** Schedule meetings early in the week to set priorities and midweek for follow-ups.

10. Utilize Training Resources

- **Why:** Staying up to date on features improves your efficiency and ensures you're maximizing the tool's potential.
- **Step-by-Step Instructions:**
 1. Access training videos from the **Dashboard** or **Help Center**.
 2. Attend live webinars for feature updates or best practices.
 3. Encourage team members to complete the available tutorials.
- **Pro Tip:** Assign a "SignTracker Champion" in your team to lead training sessions.

