

CardMaster
Access and Control Systems

From



CARDLOCK VENDING



CM HOST
CM CardTransporter
Fuel Communication and
Management Software
10.10.06
Software version up to 3.1

CM Host Manual For CardMaster Fuel Control

www.cardlockvending.com customers call 888-487-5040

READ THIS MANUAL COMPLETELY BEFORE PROCEEDING

Many operations that occur while using CMHost involve downloading or uploading of data files. How you actually communicate to the CardMaster, RF, Direct serial, Direct USB, LAN, Telco or Cellular will affect the speed at which data is transferred. A visual Status window is provided at the bottom of the main screen. This will allow you to see if an operation you have asked to be performed is completed.

Failure to wait for an operation to complete before asking for another operation may result in an error message and the stopping of the program.

Although the CMHost has been tested extensively with Windows XP, Windows Vista, and Windows 7 there is no guarantee that there may be an issue arise that was not seen in the testing phase of this product.

If an issue does arise shut the program down and start over. If the issue continues please contact CardLock Vending at 425-487-8724 for technical assistance.

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GETTING STARTED

Welcome to the new Cardlock Vending Host Software.

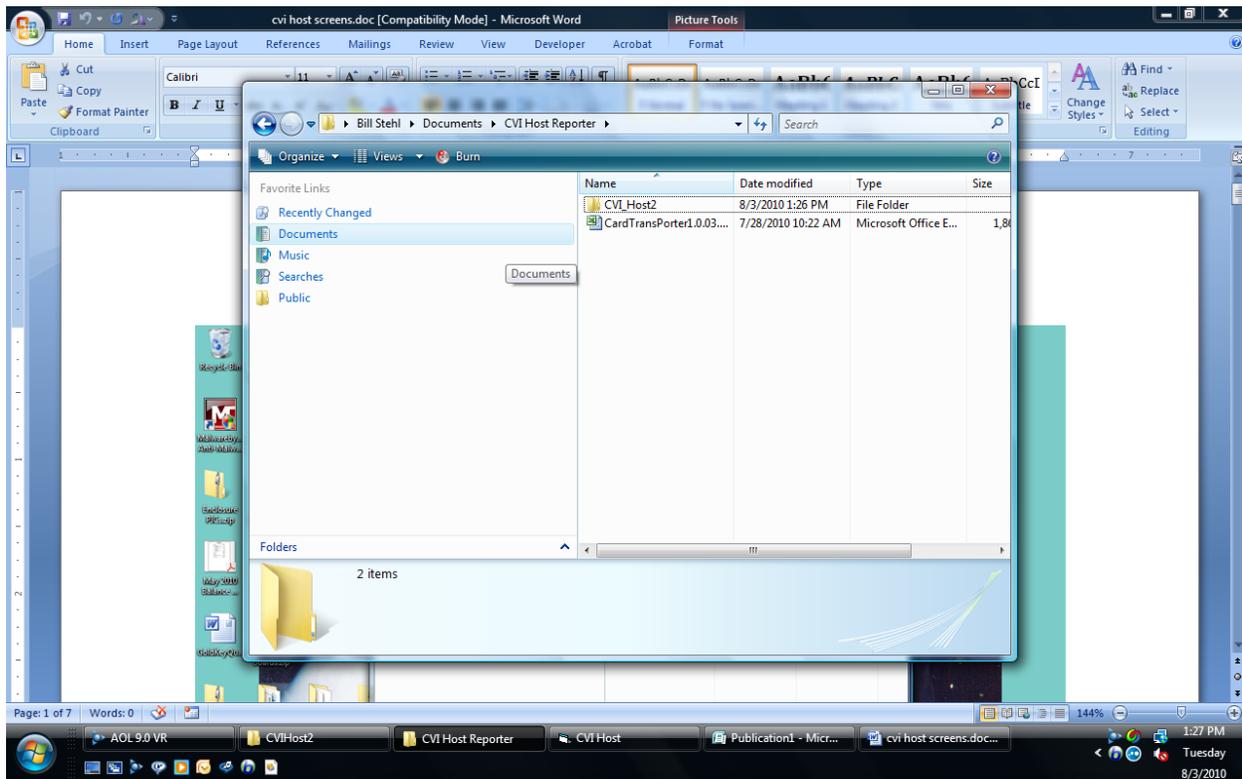
You have been supplied a CD with the following programs on it:

1. CM Host 3.1.0.0
2. CardTransporter Report Package
3. CM Host Manual

To begin insert the CD into your CD drive on your PC or Laptop.

Wait till the PC opens the file manager or go to My Computer and click on the CD drive to open.

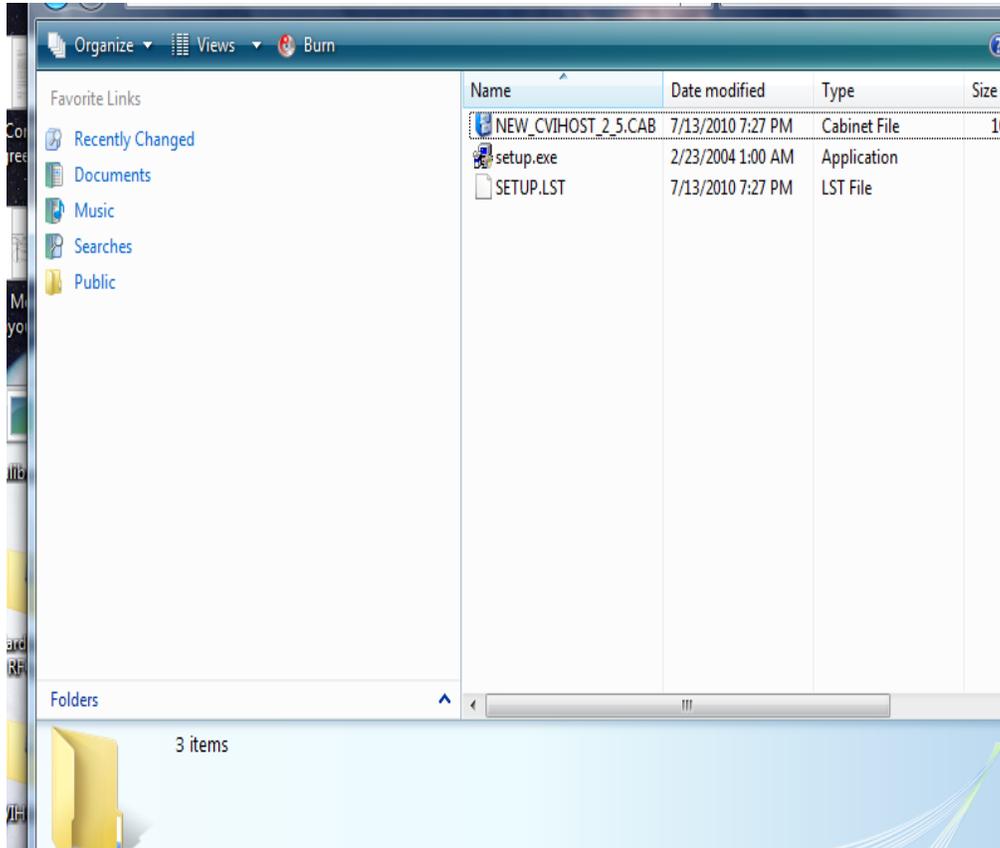
You will see the following files appear:



Click on the folder CM Host2 to open it.

The following screen will appear:

Click on the Setup.exe line

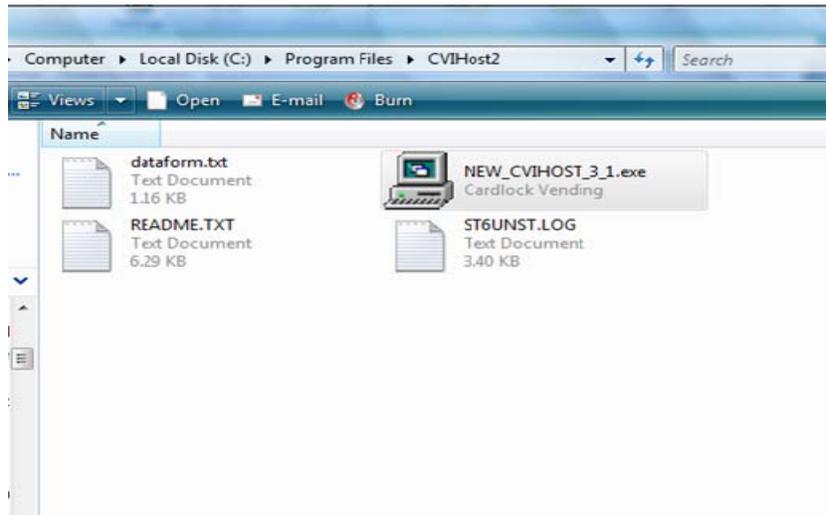


Follow the instruction as the program proceeds through the set up.
Windows Vista and Windows 7 will ask if you want to allow this program.
Press the Allow button.

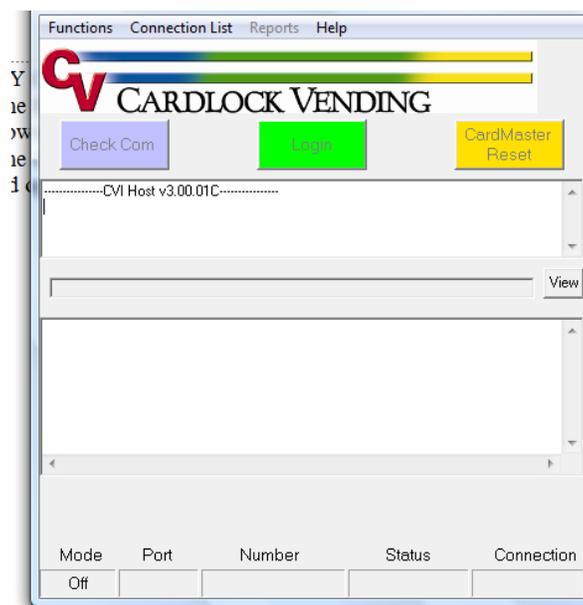
Then on the next box to appear click OK
Then click on the Icon with the computer in it.
Allow the program to complete its installation.

Once the installation is complete then to proceed you should have some understanding of Windows file structure to proceed. However, if you do not then the following pages will help. **ONCE YOU HAVE READ THIS MANUAL YOU MAY CALL CARDLOCK VENDING TECHNICAL SERVICES FOR HELP.**

Go to MY Computer and open your C drive.
Locate the folder called Program Files.
In Windows 7 it is the folder called Program Files (86x)
Locate the CM Host Folder and open. The following screen will appear.
Click and open the CM Host.exe file and let the program open.



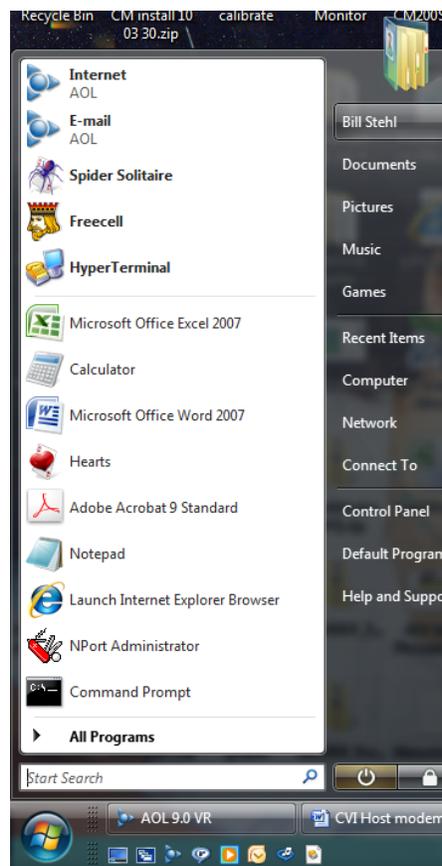
The following screen will appear. This is important to do because it loads the report folder into the file structure for future use. You can close the program now and you will come back to it later.



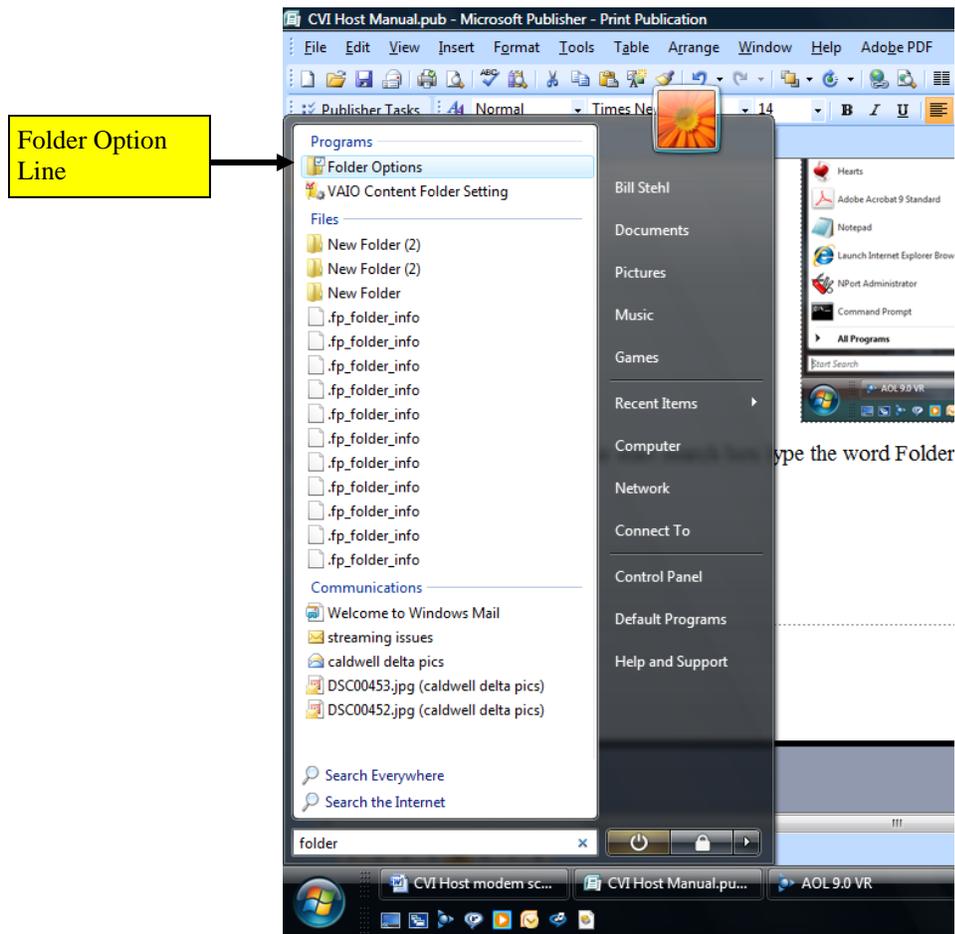
Windows Vista and Windows 7 requires data files to be transferred to specific locations in your computer. CM Host creates data files automatically in the file path C:\Users\name of user as defined on PC\AppData\Roaming\CM\Host.

You must be able to locate this AppData file on your PC. This is where the excel program CardTransporter must be copied to. Most Windows PC's are set up so that the AppData file is considered a Folder to be hidden. If this is the case on your PC you will have to access folder management.

To do this left click on the Windows start button. The following screen will appear. It may vary in appearance depending on how your computer is set up.

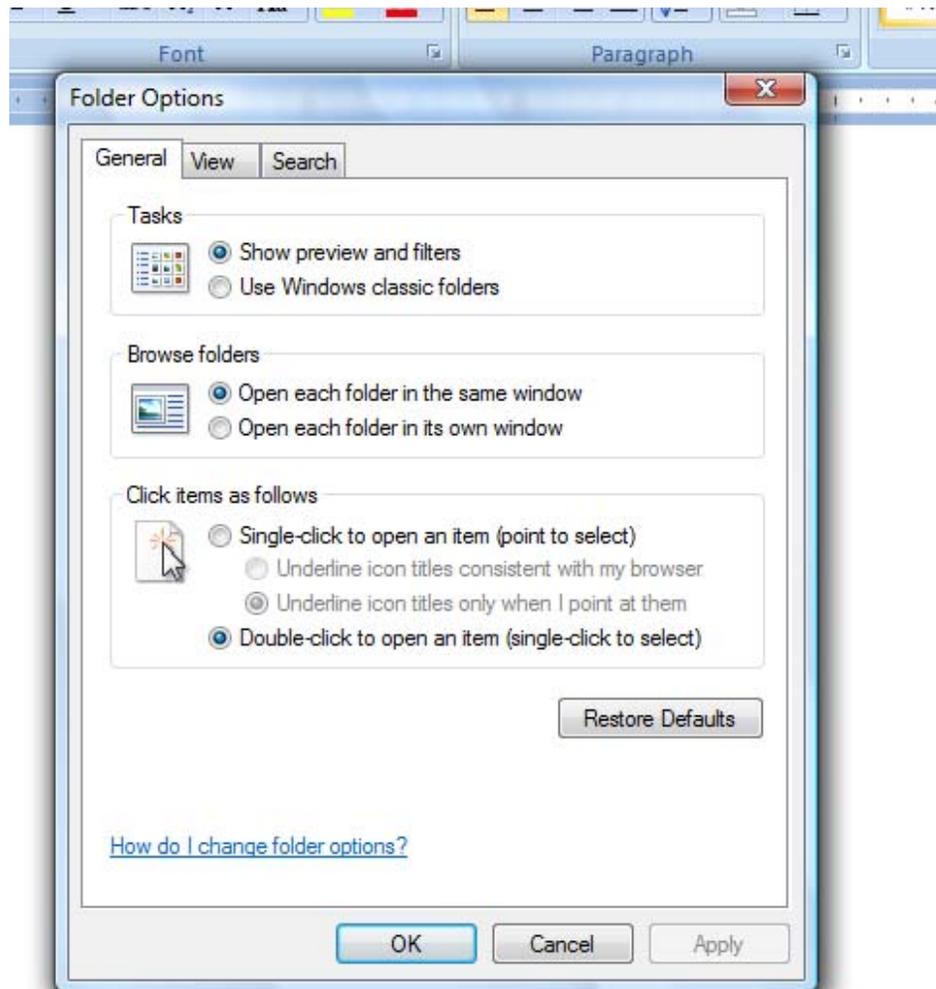


In the start search box type the word Folder: The following screen will appear.



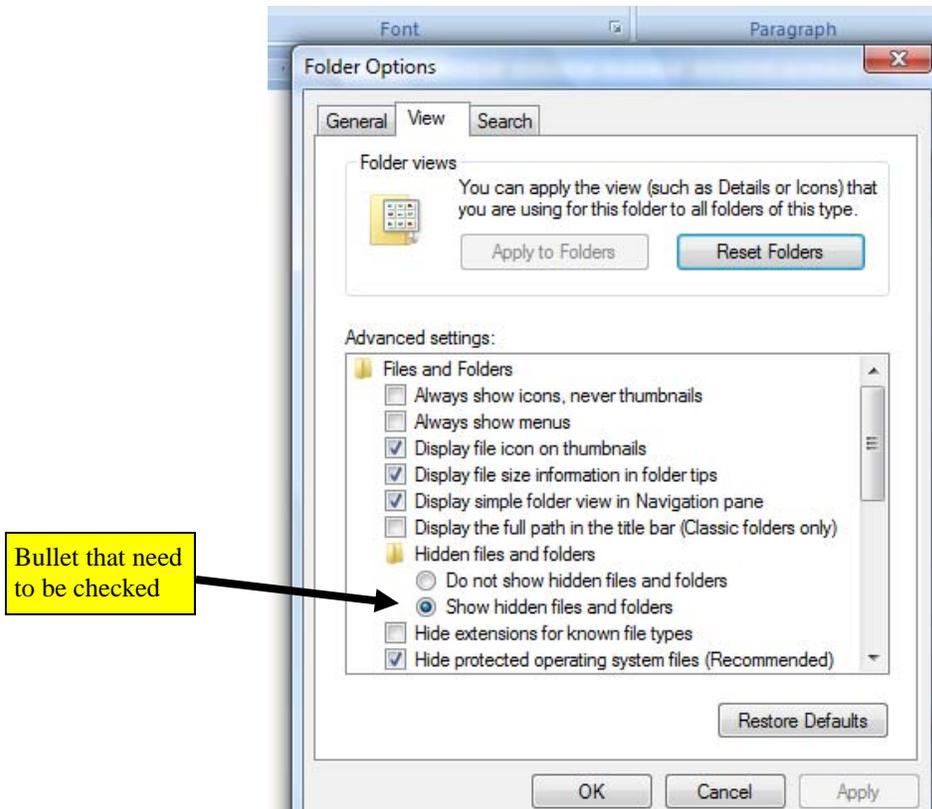
Click on the Folder Option line:

The following Window will appear:

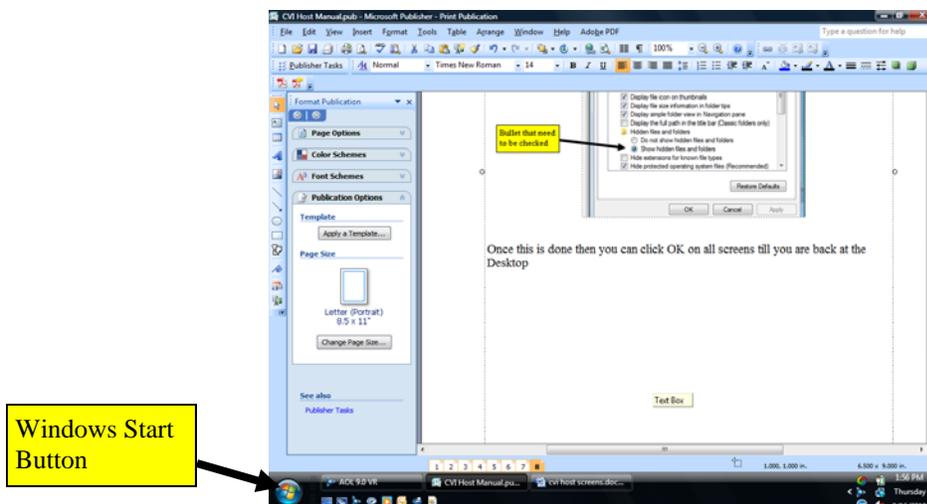


Click on the View tab

The following screen will appear: make sure the bullet is marked that says “ Show hidden files and folders”



Once this is done then you can click OK on all screens till you are back at the Desktop and then click on the Windows Start Button



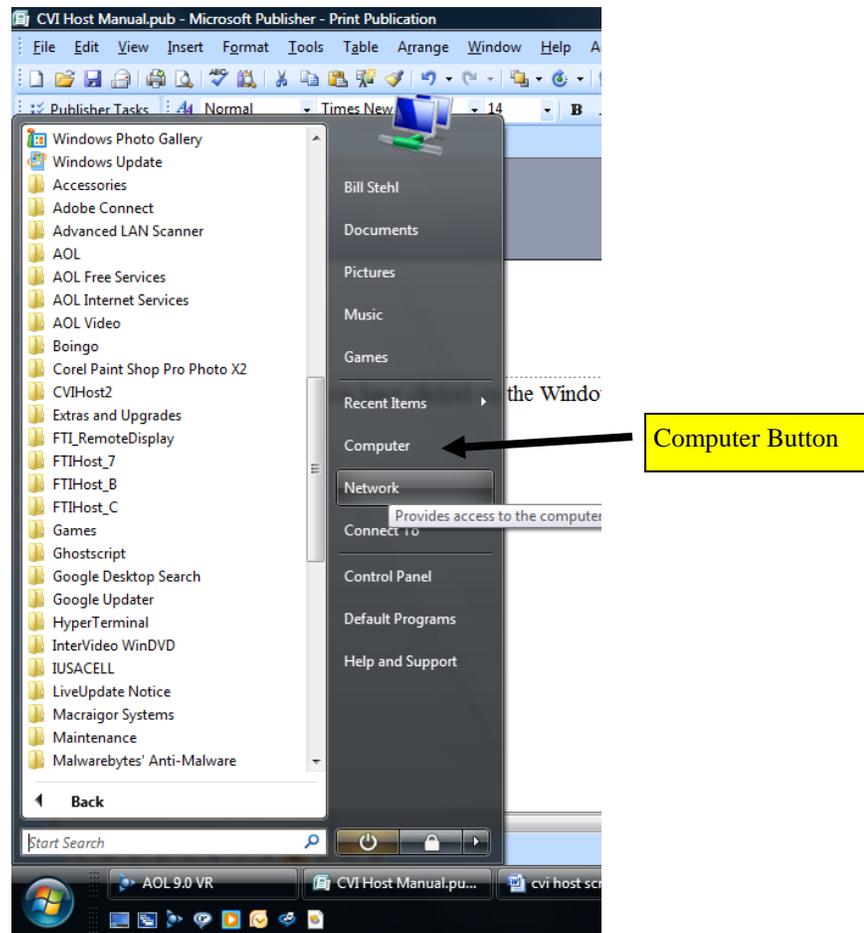
ATTENTION

IF YOU PERFORMED THIS FUNCTION AT THE BEGINNING THEN YOU MAY SKIP THIS AT THIS TIME.

BEFORE PROCEEDING WITH THE FOLDER ACCESS YOU SHOULD GO TO THE CM HOST PROGRAM AND OPEN THE PROGRAM THIS WILL SET UP THE CM FILES IN THE APPDATA FOLDER FOR FUTURE USE

REFER TO THE SECTION ON OPERATING CM HOST

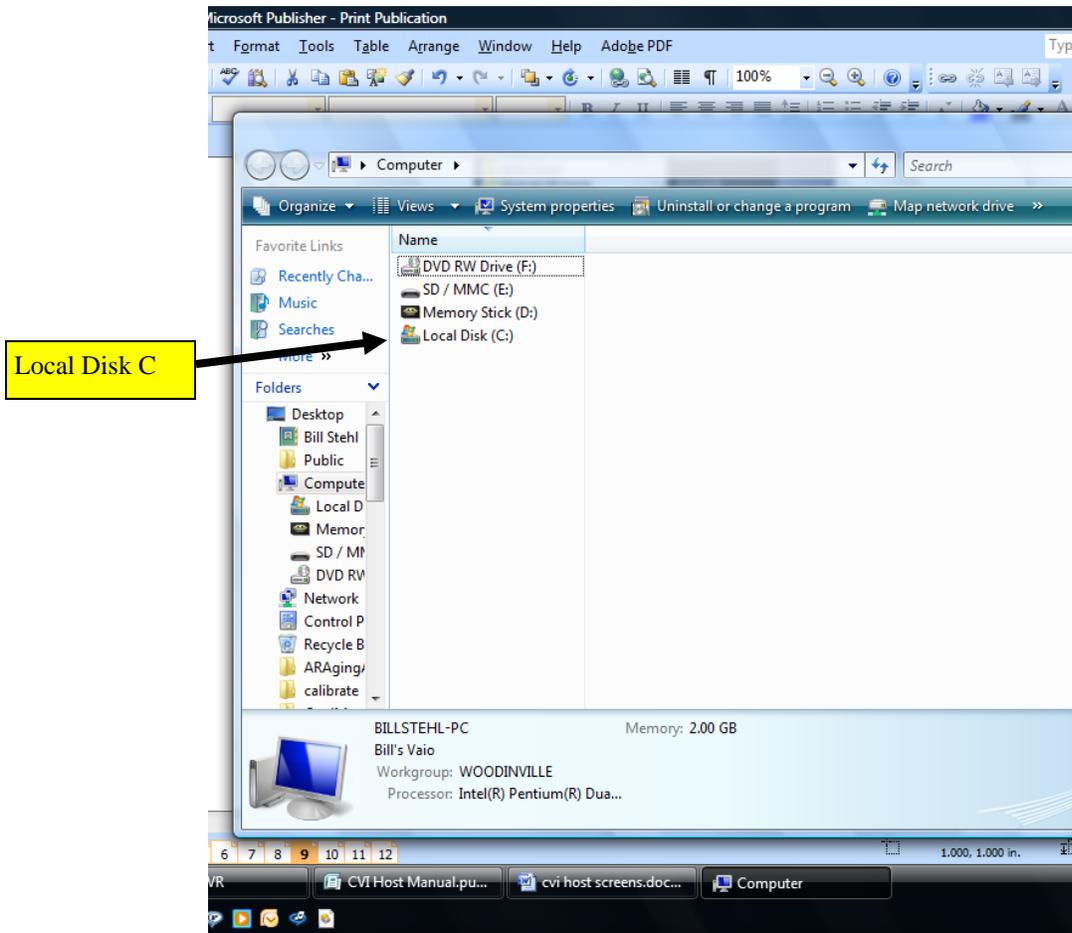
Once you have clicked on the Windows Start Button the following screen will appear. It may vary from Vista and Windows 7 in appearance.



Click on the computer button:

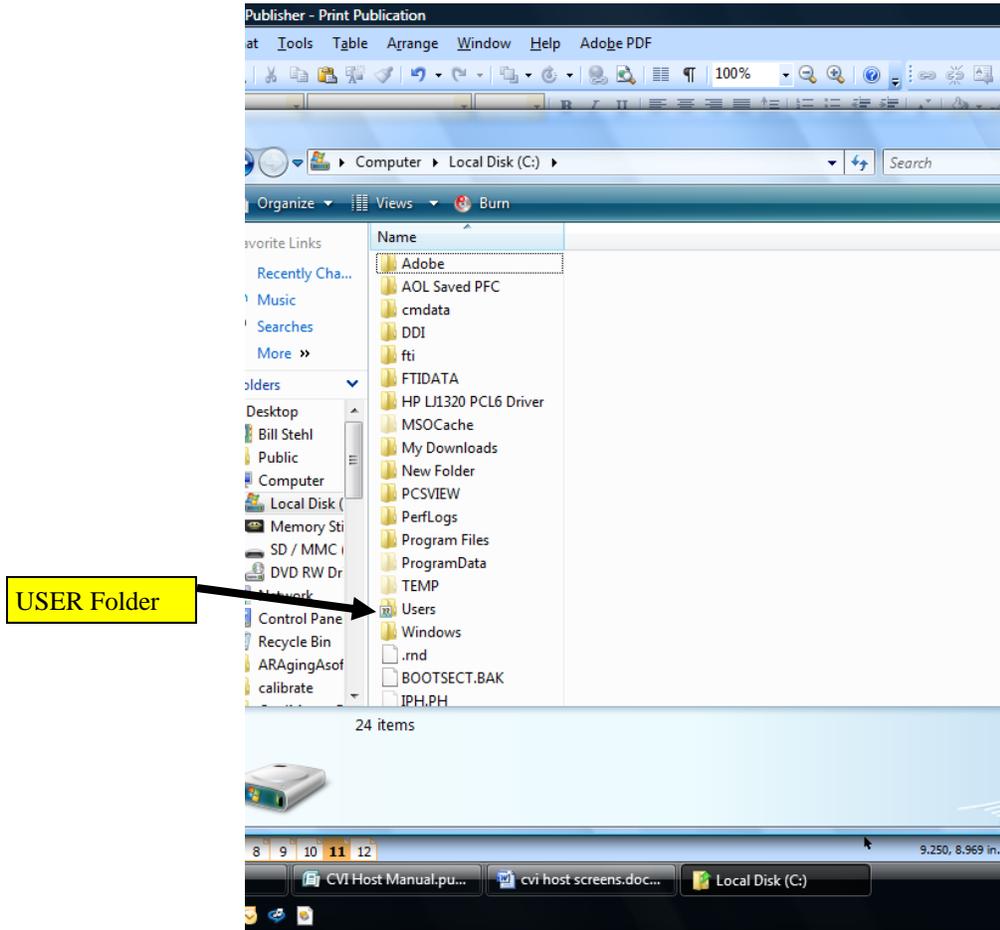
Once you have clicked on the computer button the following screen will appear. Again it may vary in appearance depending on the operating system and how your PC is set up.

Click on Local Disk (C:) and open the C drive



Once you have opened the C drive the following screen will appear. It may vary in appearance based on the operating system and your PC setup.

Click on the USER folder or in some instances Documents and Settings

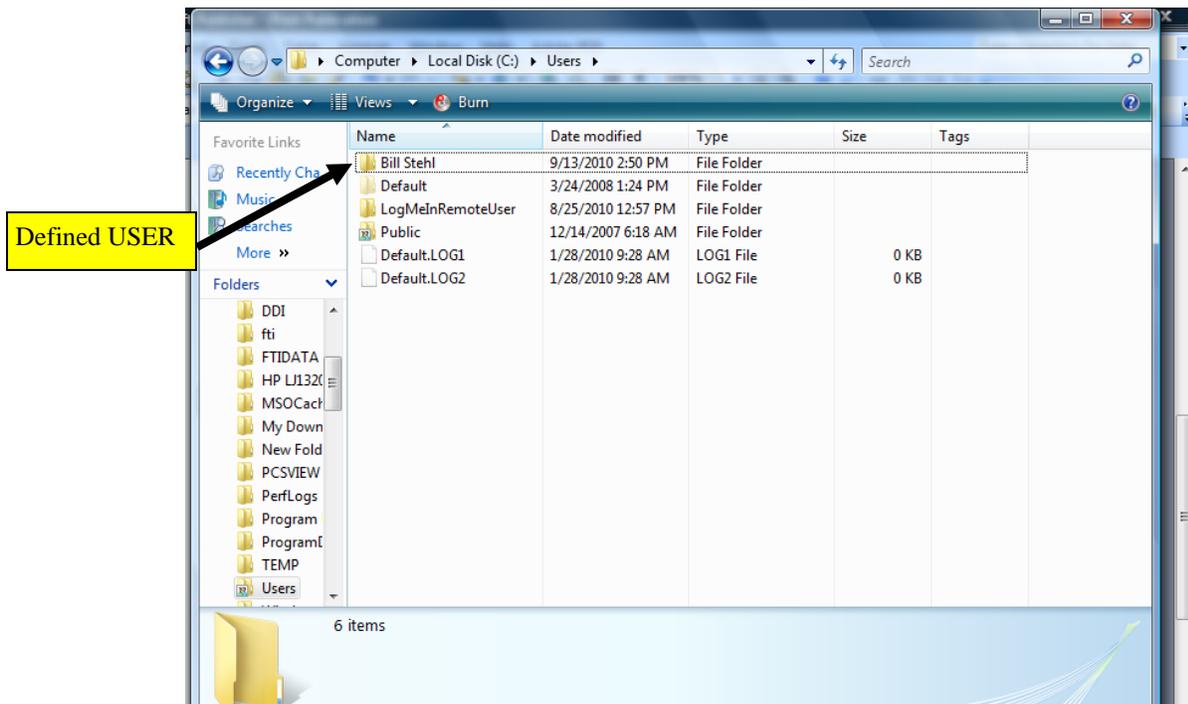


FOR XP USERS:

The ApplicationData folder is accessed by clicking on My Computer, then clicking on C drive, then on Documents and Settings, then on the user's name.

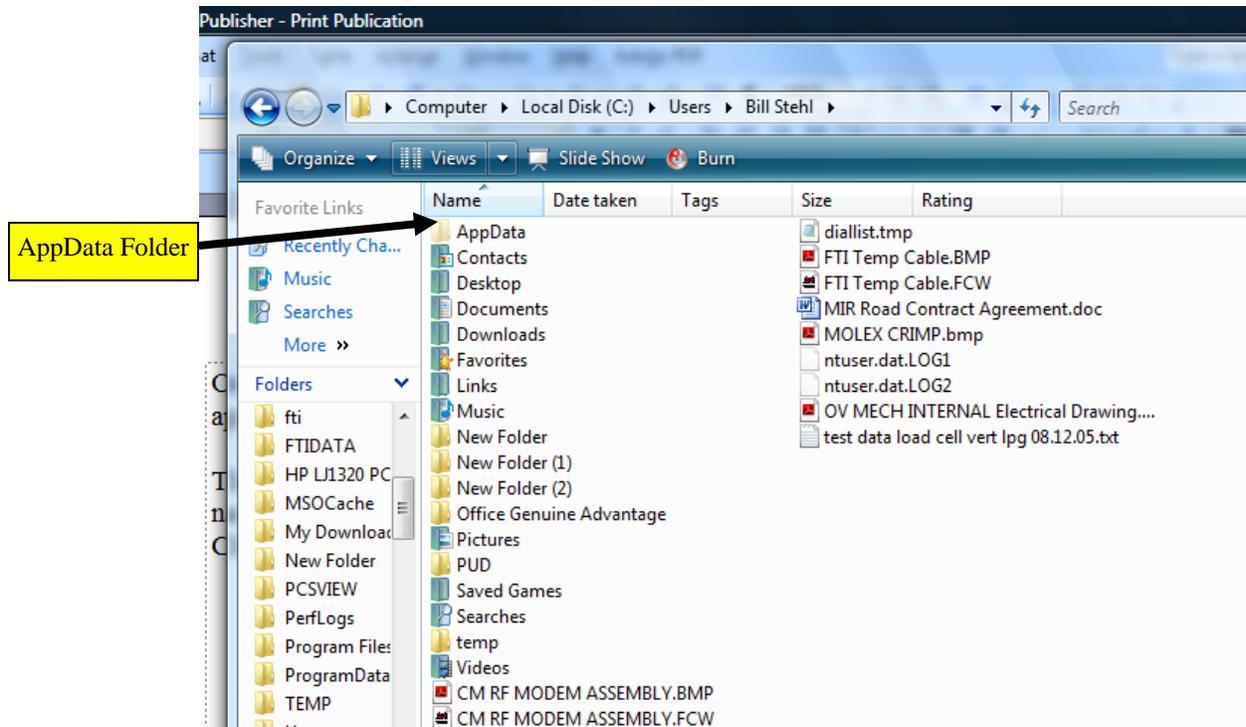
Once the USER Folder is opened the following screen will appear. It will vary in appearance depending on the operating system and your PC setup.

The named user of this PC will be what the PC was named at setup. It may be the name of the person authorized to operate the PC or the company name. Click on the USER of this PC:



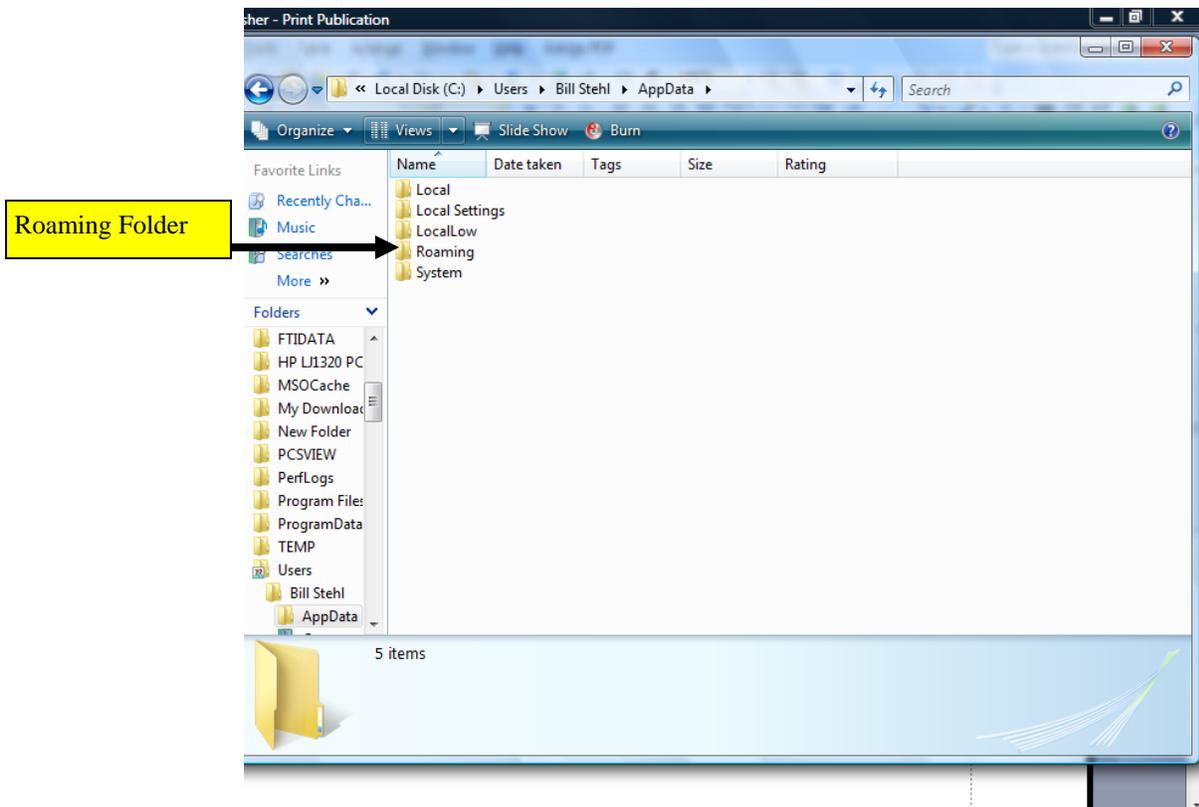
After the Defined USER is opened the following screen will appear. It may vary in appearance depending on operating system and PC setup.

Click on the AppData Folder. In XP and some versions of Vista it may be labeled Application Data.



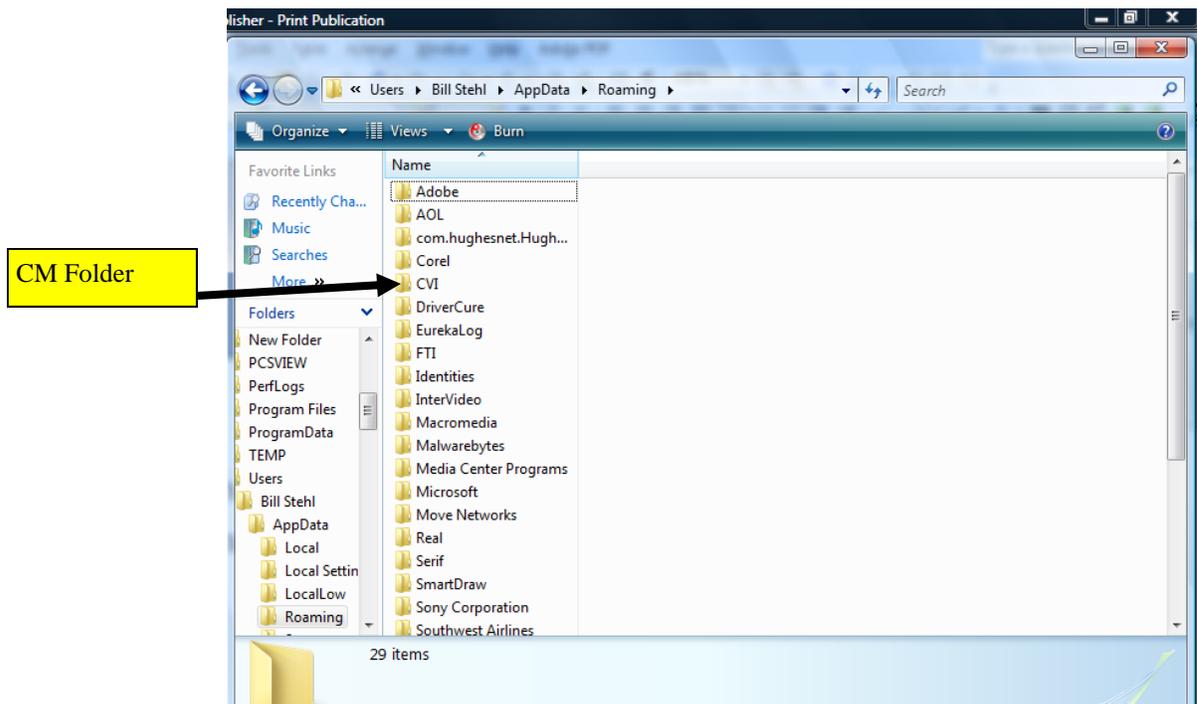
The following screen will appear after opening the AppData folder

Click on the Roaming Folder



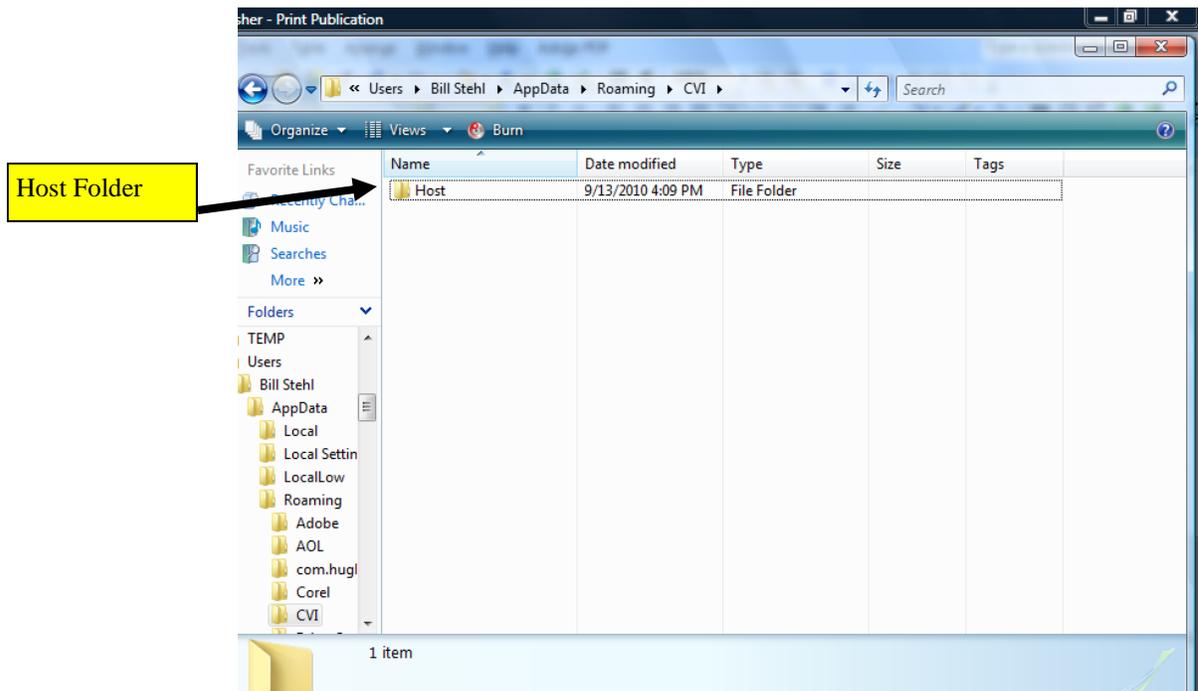
Once the Roaming Folder is open the following screen will appear. Appearance may vary based on operating system or PC setup

Click and open the CM Folder



The following screen will appear after opening the CM Folder

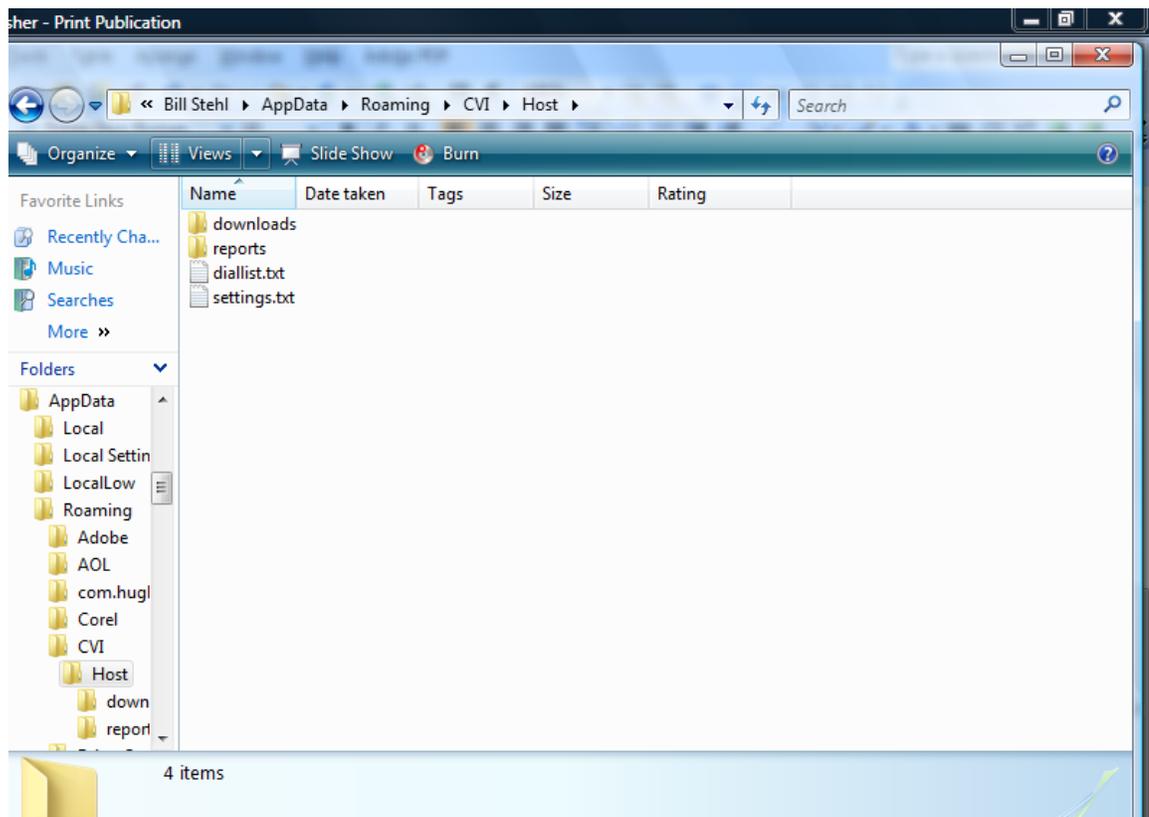
Click and open the Host Folder



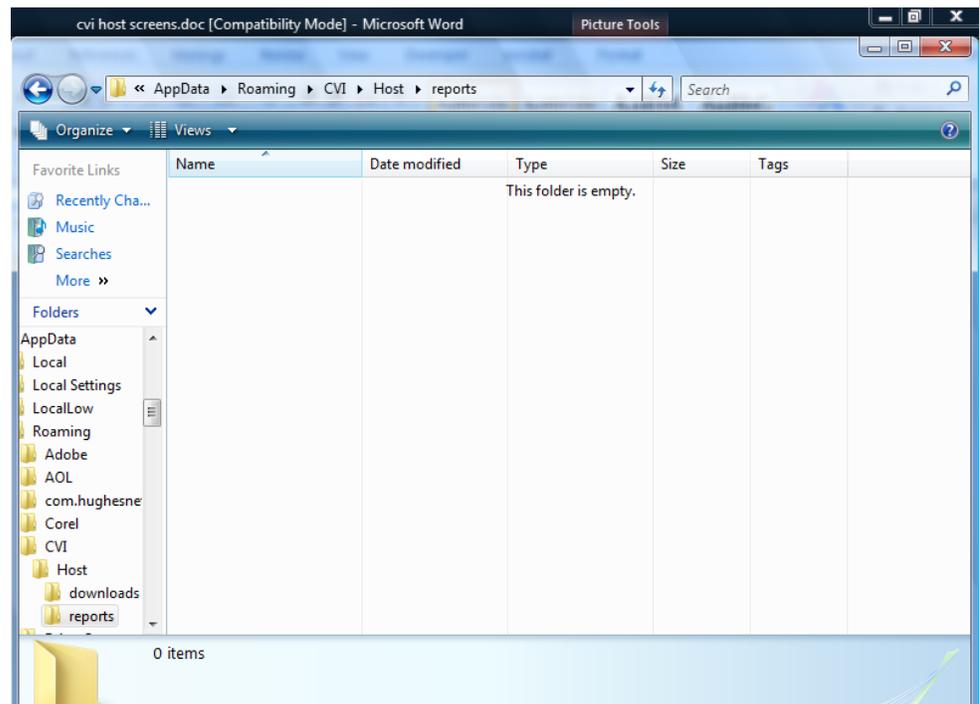
After opening the Host Folder the following screen will appear.

Right click on Reports and send to DeskTop. This will allow you to retrieve your Reports through a shortcut on your Desktop screen.

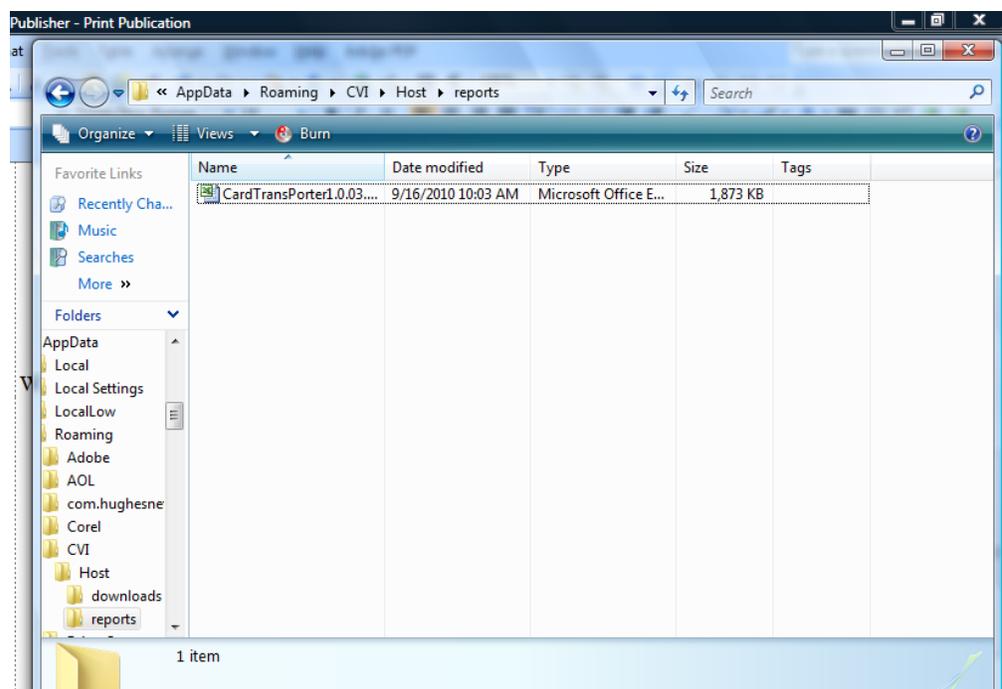
Click and open the Reports Folder



Once you have open the Report Folder the following screen will appear.



Leaving this screen open on your PC go back and open the CD drive. Right click on the file CardTransporter, and click Copy. Then return to the above screen and right click in the screen. Paste the CardTransporter file into this screen as shown below and then close everything down.

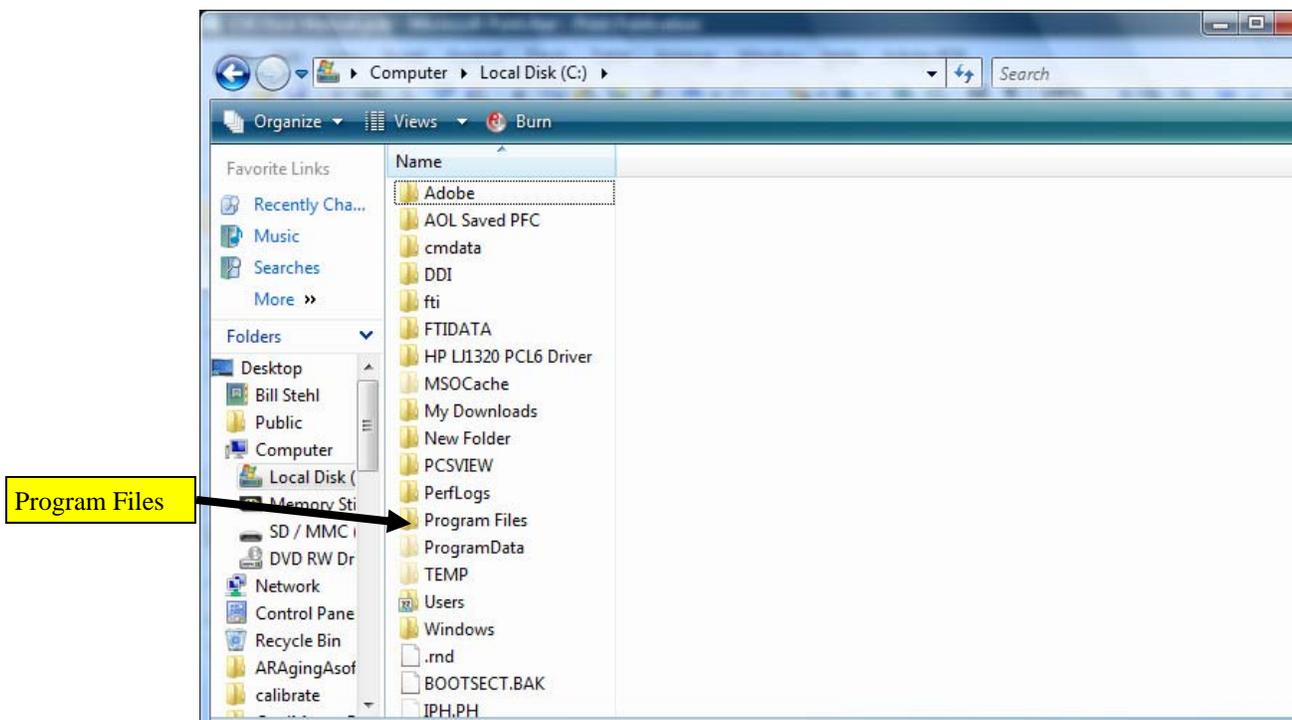


OPERATING CM HOST

Now that the Windows lesson is complete let us move on to the CM Host.

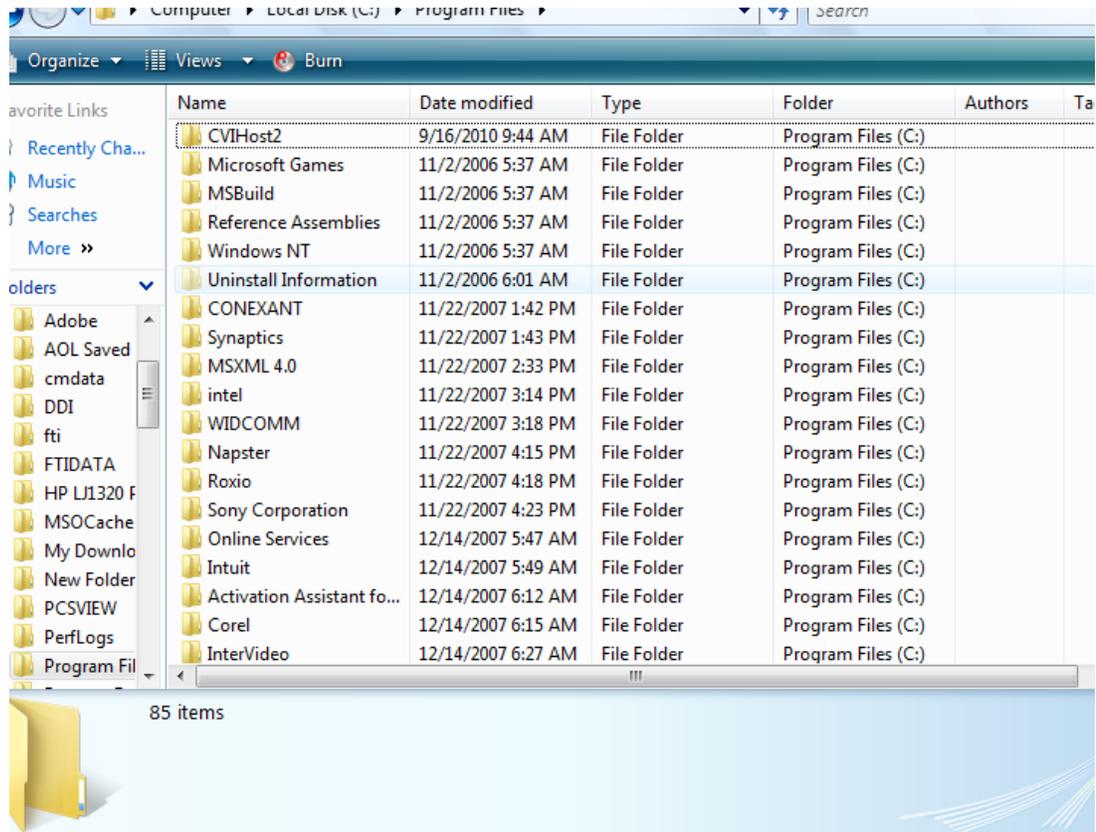
Remember the Windows start button? Well click on it again and then click on that computer button. Once you have done this click on the Local C drive again and the following screen will appear.

Click and open the Program Files Folder.
In Windows 7 click on Program Files (x86),

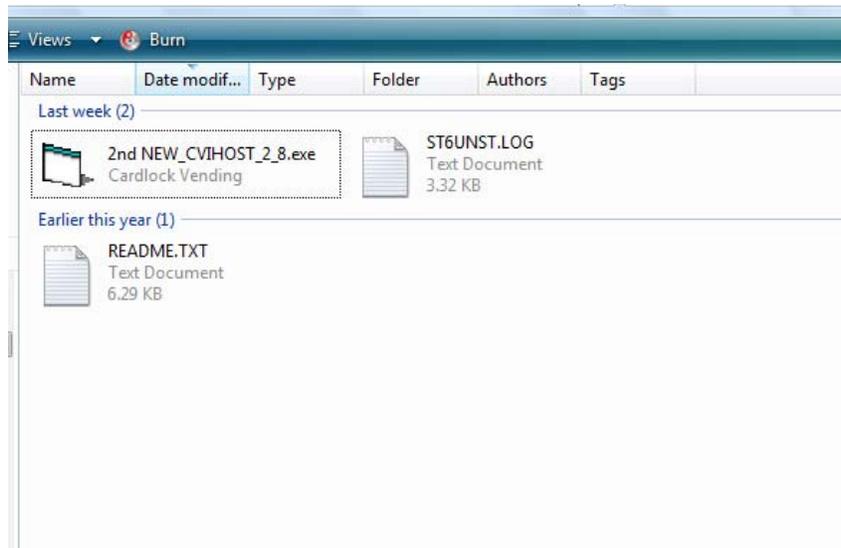


Once the Program Files folder is opened the following screen will appear

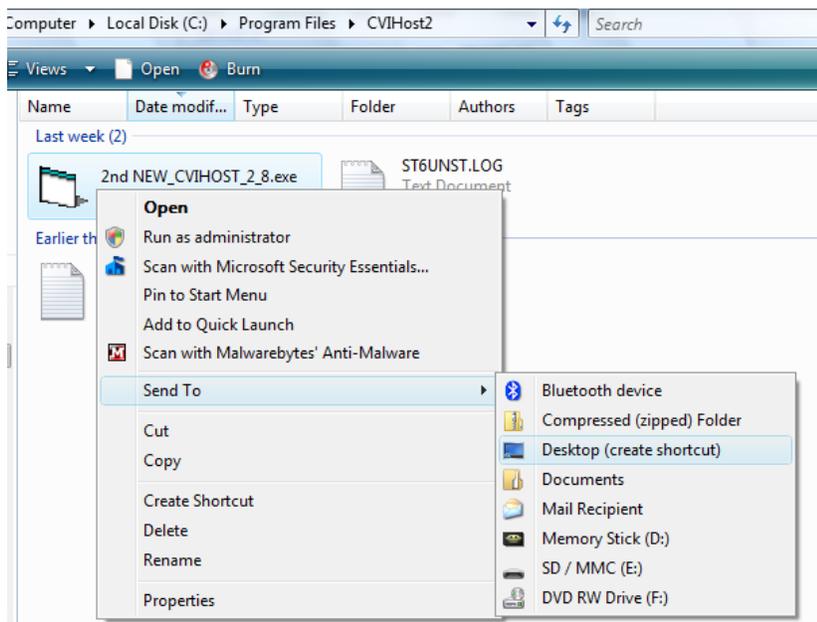
Click on the CM Host2 Folder and open



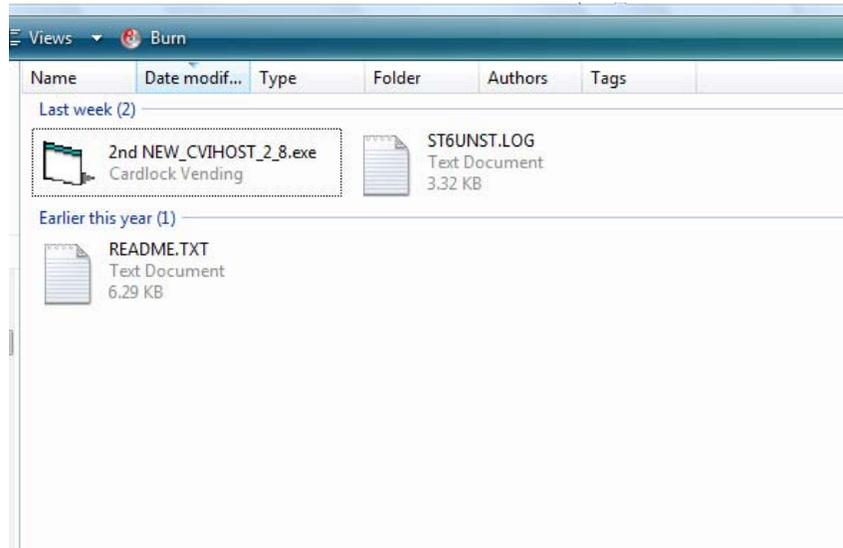
After opening the CM Host2 folder the following screen will appear. Right click on the CM Host .exe file.



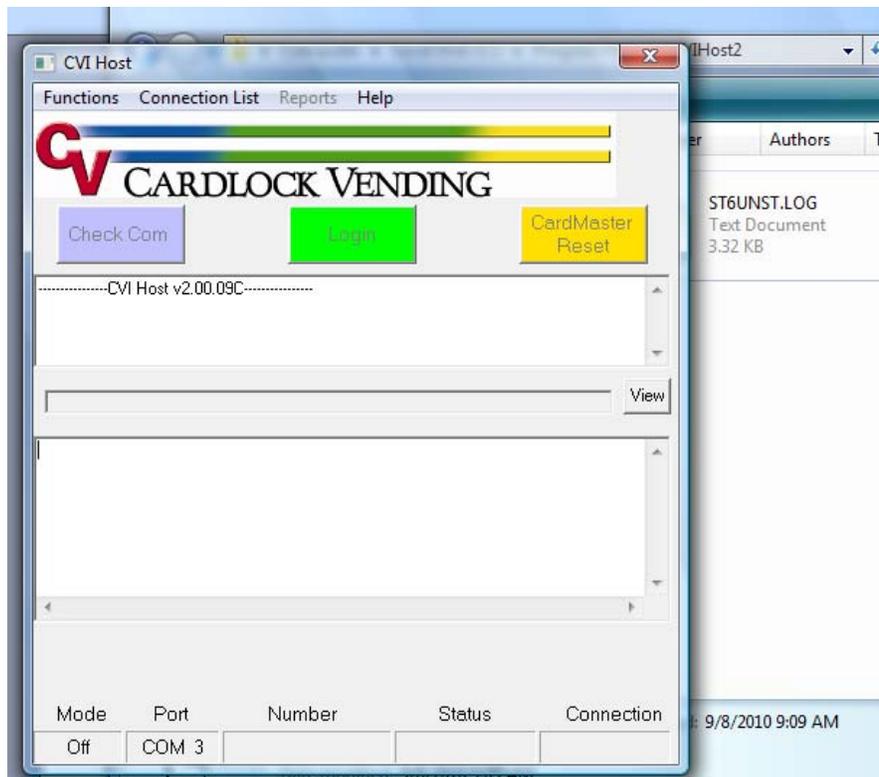
The second window below will appear. Move Your cursor to the send to tab and then to the Desktop tab. Then left click on the Desktop tab. You have just created an Icon shortcut on your Desktop screen to access the CM Host .exe file without having to go to the start button.



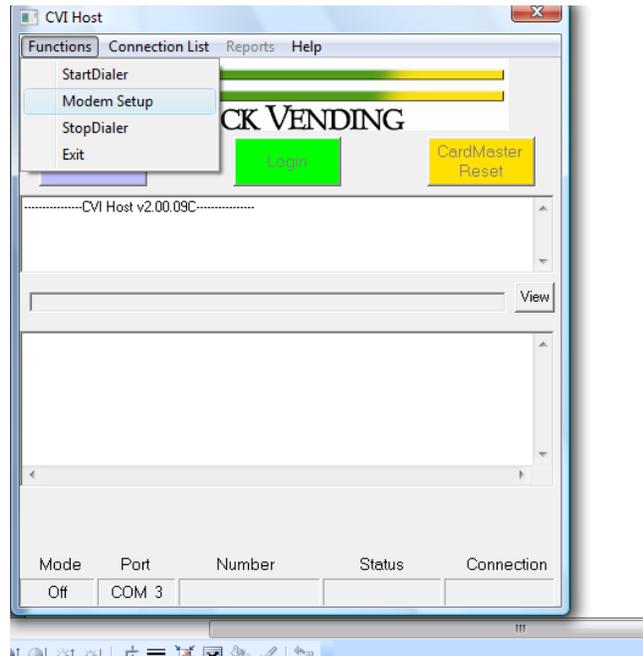
Now left click and open the CMHost.exe.



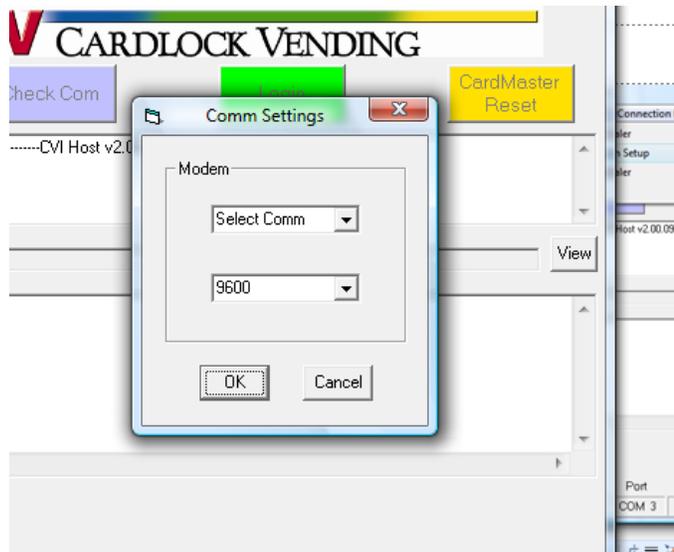
The screen below will appear.
Click on the Function Tab



Then click on Modem Setup:



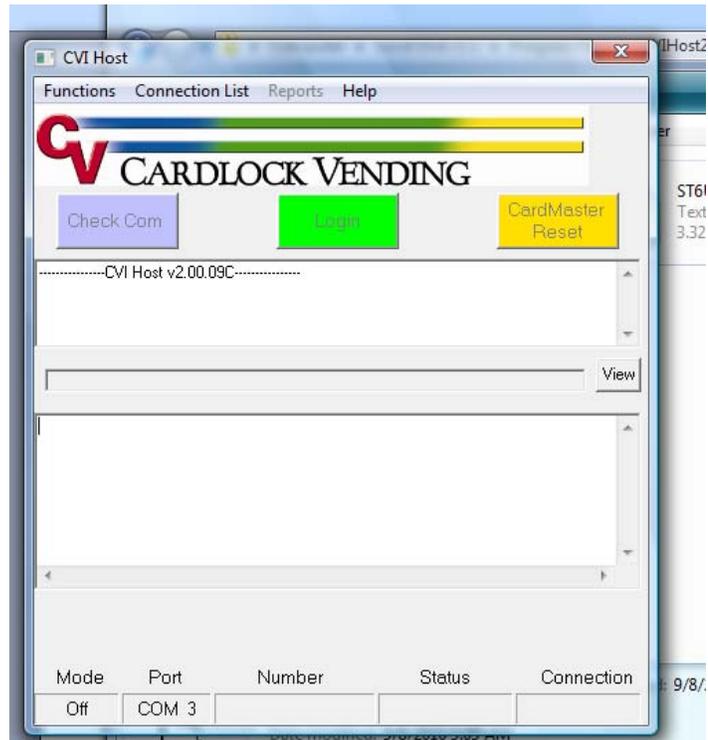
The screen right will appear and you must choose the comm. port your telephone modem is using if you are communicating to the CardMaster by phone modem. You must also choose the baud rate which is 9600. If you are not using a phone modem to communicate with the CardMaster then you must choose none. This is done by clicking on the drop down arrow in the select comm. window and choosing none. Then click OK to proceed.



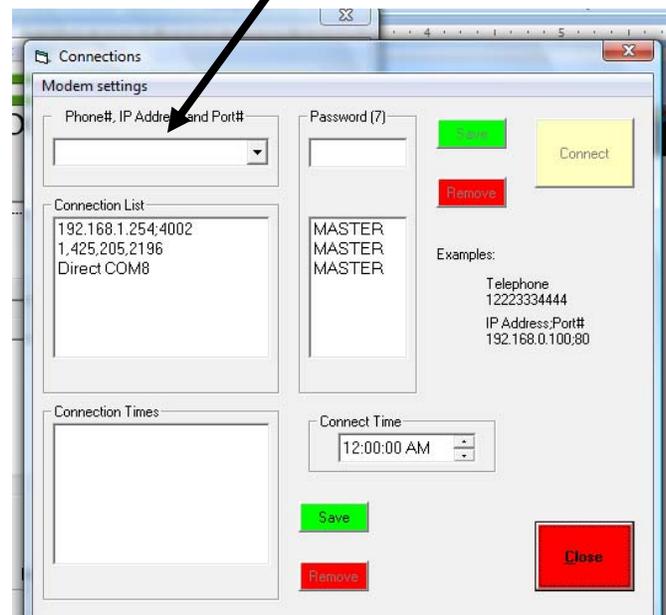
Now click on the Connection List Tab. This could take up to 20 seconds to open.

Once you have opened the connection list the screen below will appear. If you are communicating to the CardMaster by any type of serial connection a comm. port is being used. This would include direct serial 485, RF modem, and in some instances LAN interface. By clicking on the drop down arrow in the window labeled Phone#, IP Address and Port# the available comm. ports will be listed. Choose the correct comm. Port and then type in your Password in the Password Window if it is something other than MASTER. Then click on SAVE and the comm. Port will be moved to the Connection List box. If you are using a phone modem to communicate to the CardMaster then type the phone number and the access code if using a line share device in to the Phone# window. Then type your Password and click on SAVE. The phone number will be moved to the Connection List Box.

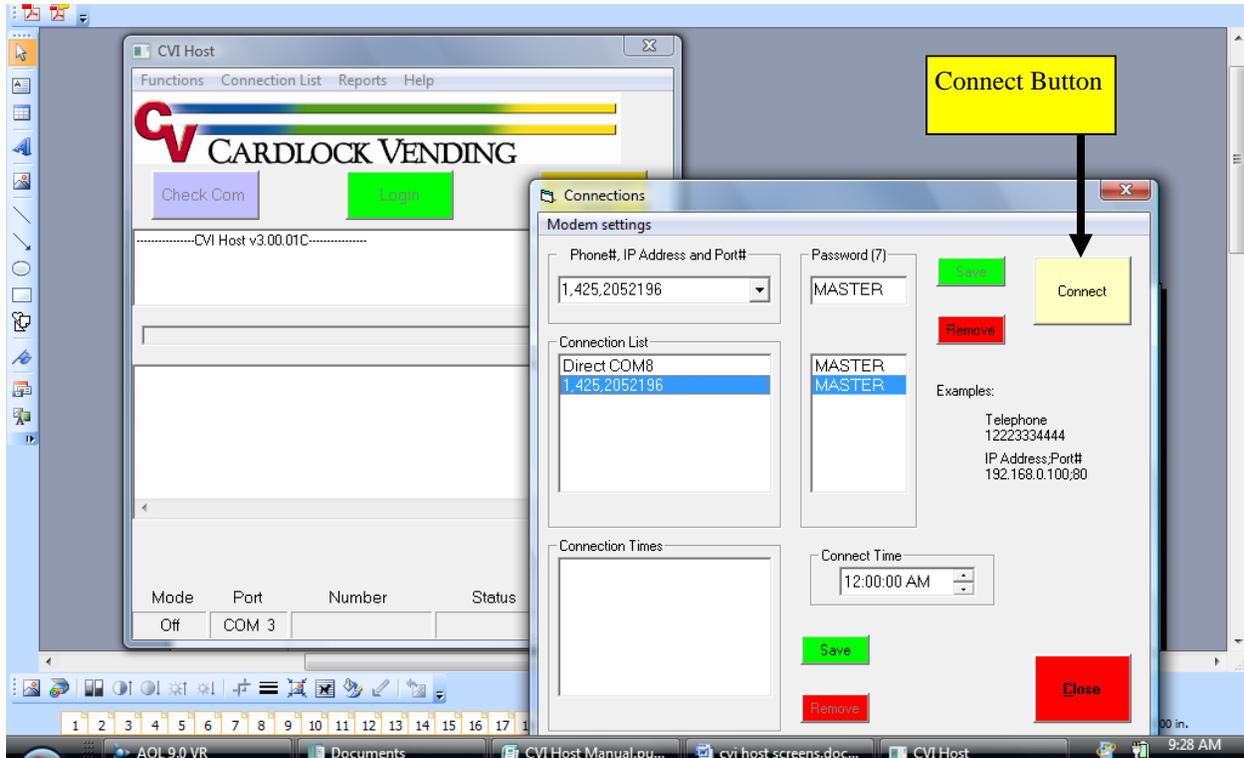
If your are using a TCP/IP Address to communicate to the CardMaster, this includes LAN devices and Cellular Modems, then you must type into the Phone# Window the IP address that is being used. You must also know the port that the LAN device is tied to on your Router. The IP address is formatted as follows 192.168.1.254;4002



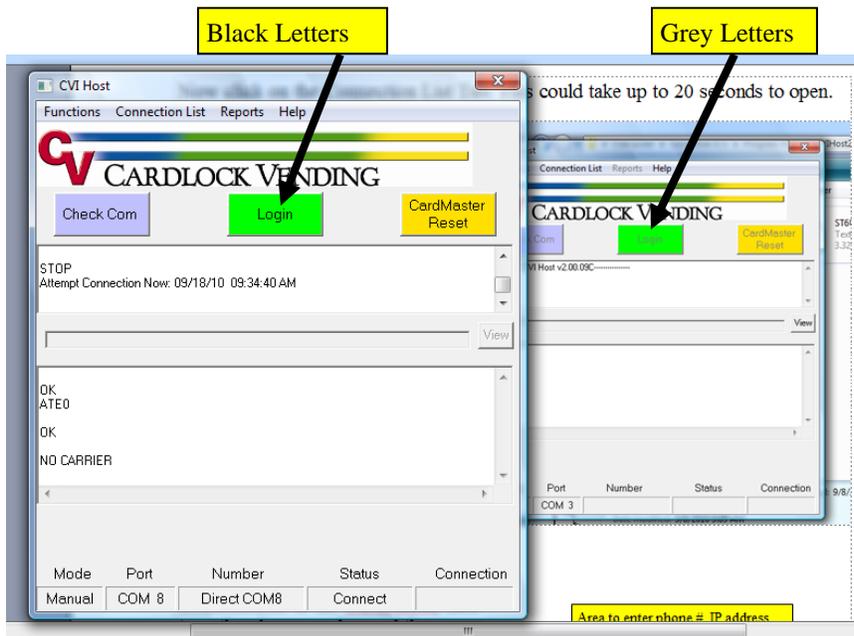
Area to enter phone # ,IP address, Or Drop down to choose Comm Port



Once a comm. Port ,IP Address or phone number has been saved then click on the number and it will move to the Phone”, IP Address and Port# box. Then click on the Connect Button.



Once the connection is made the three buttons labeled Check Com, Login, and CardMaster Reset will will go to a black font on the letters rather than the grey font.



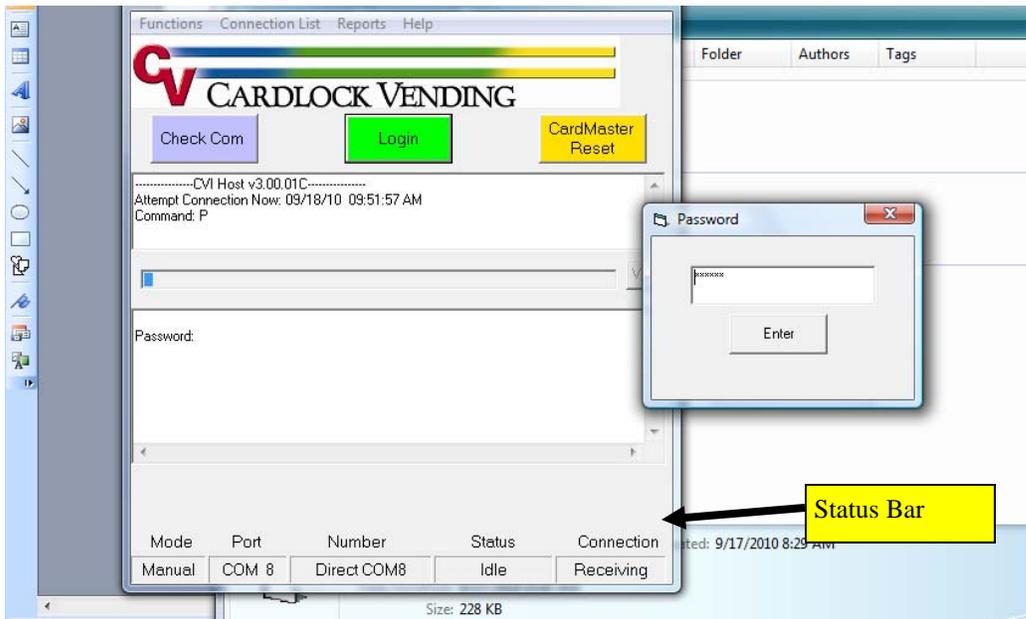
Once the button letters go black, the status bar at the bottom of the screen will fill in with the status of the items listed.

MODE tells you how you are communicating.

PORT tells what port you are using.

STATUS tells you what is being sent to the CardMaster.

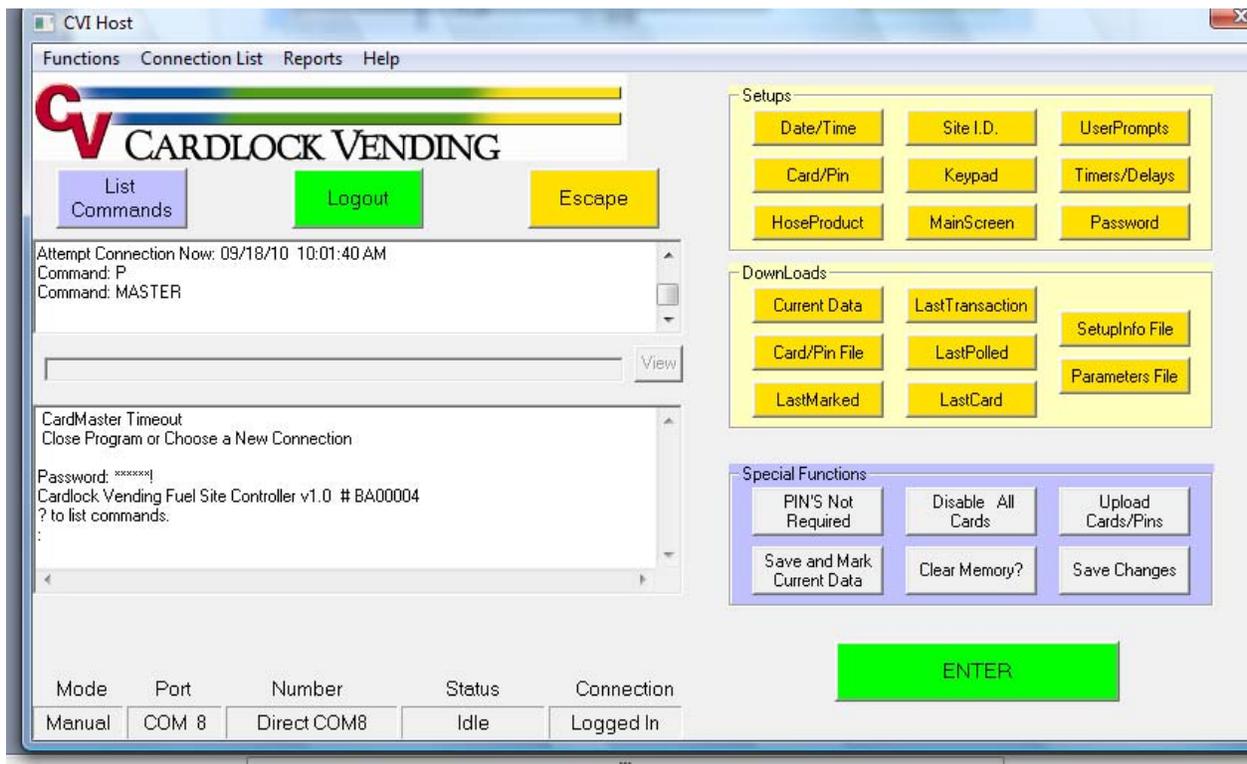
CONNECTION tells you that program is ready to receive data from the CardMaster.



Before pressing the Login Icon, if you need to Reset the CardMaster, you may do so at this time by clicking on the CardMaster Reset Icon.

Now click on the Login Button and the Password command is sent to the CardMaster and your Password is automatically brought up for you to enter. Click on the ENTER button and your pass word is sent to the CardMaster.

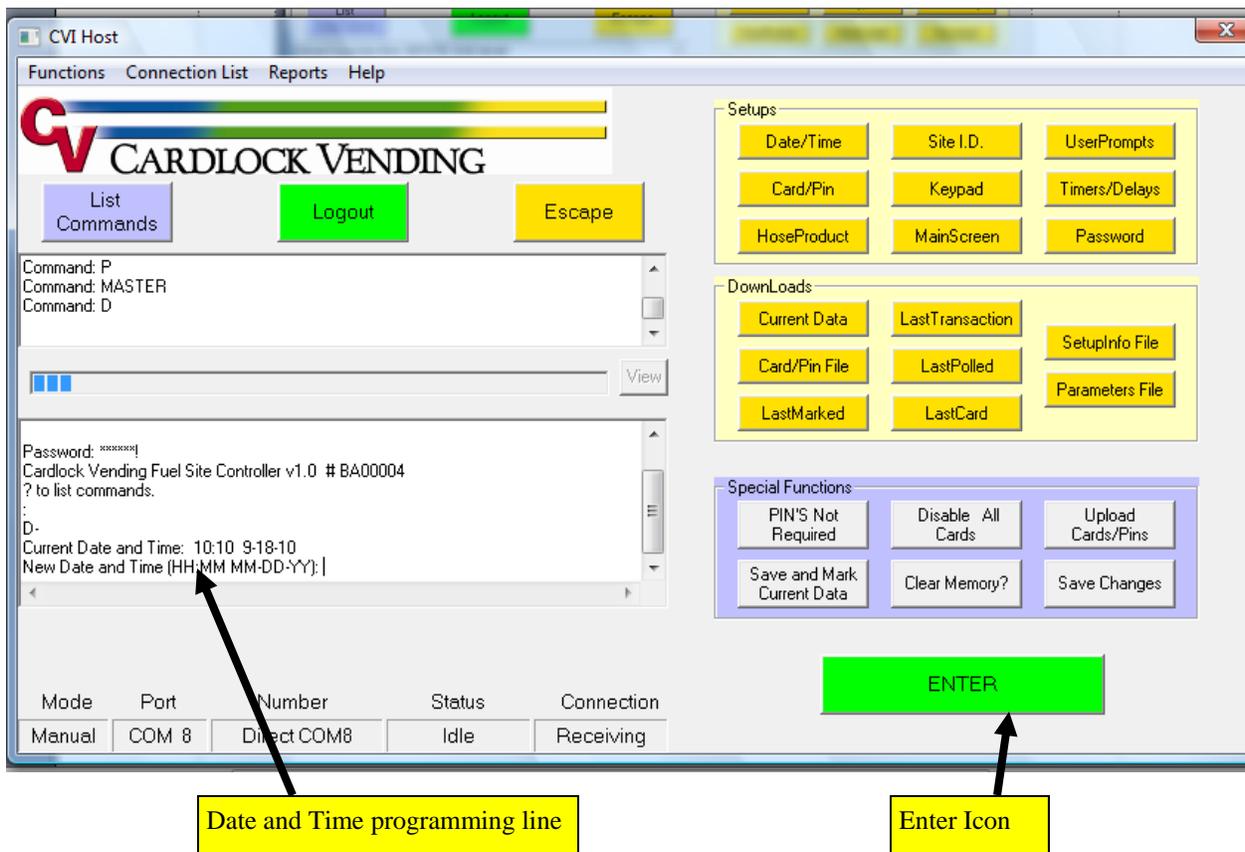
Once the Password is entered the CardMaster will respond with the Login response and the screen will expand to display the Function Icons. At this time you can perform all the Functions of programming, data acquisition, Card Pin file set, Save the Card Pin File to a file, and up load the PIN File to the CardMaster after it has been created.



PROGRAMMING FUNCTIONS

Date/Time:

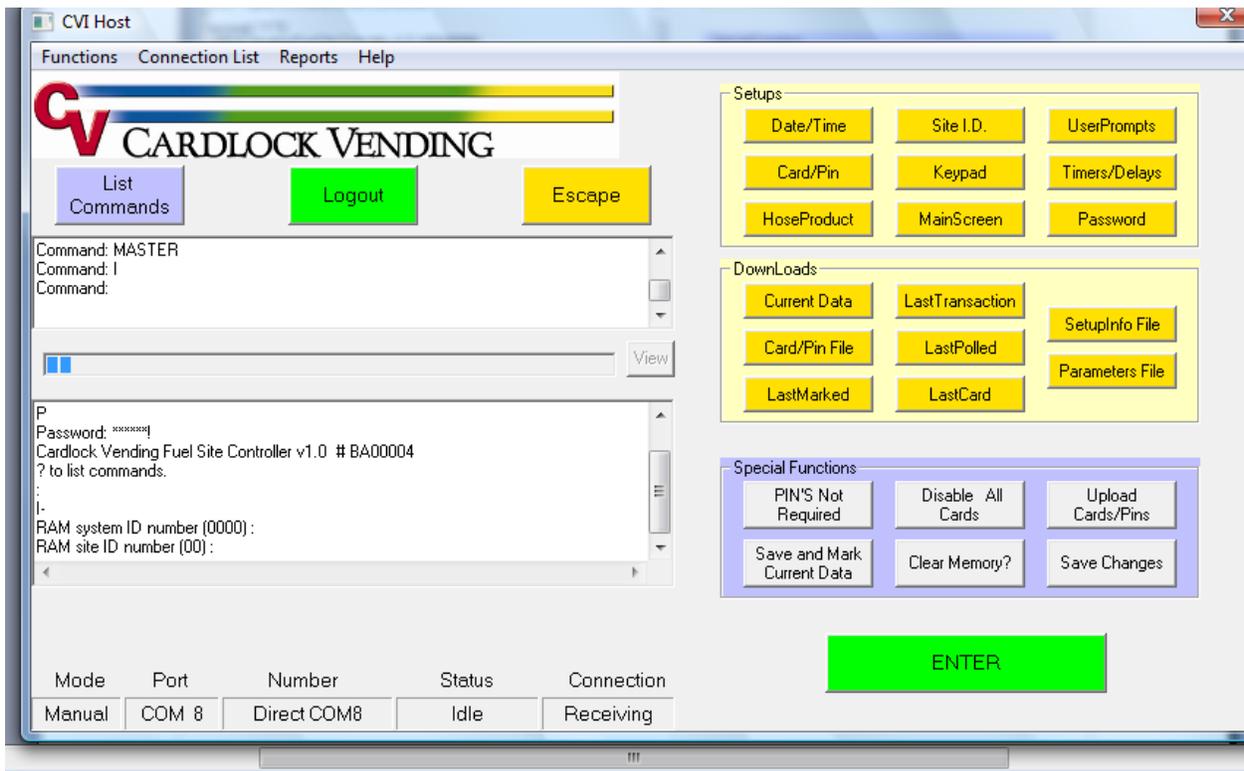
The main screen will display the operation once you have chosen a function. Example: Click on DATE/TIME The D command is sent to the CardMaster and it responds with the New Date and Time line waiting for you to enter the date and time. It is entered in the format displayed through your keyboard. Once you have Entered the date and time in the correct format click on the Enter Key and the new date and time is sent to the CardMaster. If it is correct the CardMaster will return the screen to the flashing cursor.



SITE ID

Clicking on the site ID Key will display the System ID number for your CardMaster. This is a number that cannot be changed in the field. It is important to know this number when ordering cards or parts from CardLock Vending.

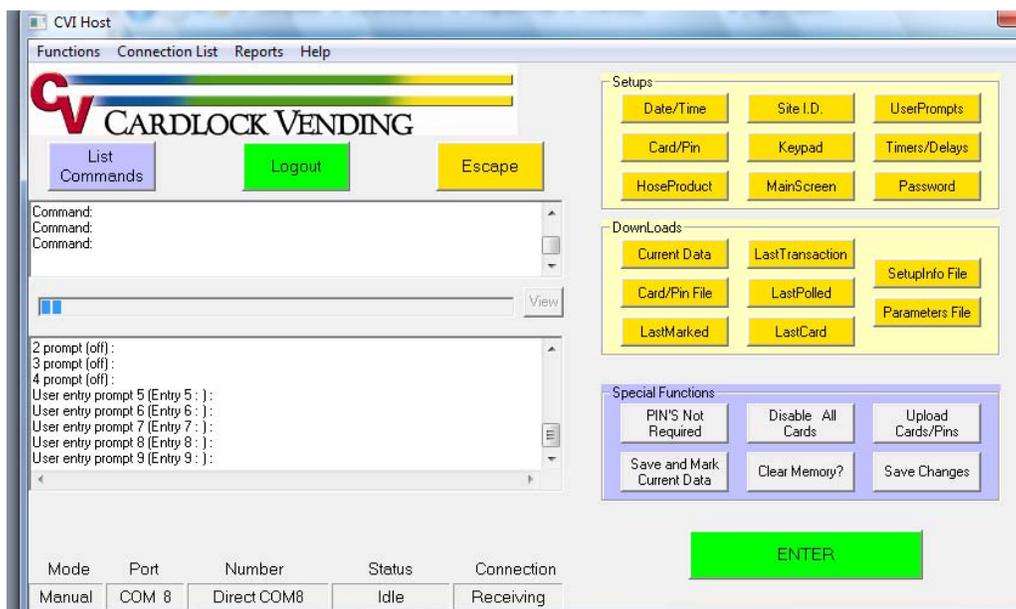
Clicking the Enter Icon will then display the site ID. This number is used for customers who have multiple CardMasters.



Clicking on the Enter Icon will then take you to the Cursor point and you are now ready to perform another function.

USER PROMPTS:

Clicking on the UserPrompts Key will display User Prompts 2 thru 4 available to you and the naming functions for prompts 5 thru 9. User Prompt 1 is available on programmed cards or thru the Key Pad Programming. Names for the prompts are defined by CardMaster for names 1 thru 4 and 5 thru 9 are defined by the user. To turn on Prompt 2 thru 4 you must assign them names by entering a number associated with the name you wish for that prompt. Example entering a 1 after user prompt 2 will turn on the prompt and display Odometer on the CardMaster screen at the 2nd prompt. After you have assigned the name you want for prompt 2 click on the Enter Key and it will display the next prompt. You can decide to Assign user defined name # 5 at this point and then actually enter the name when you get to prompt 5. See Table below for user defined names.



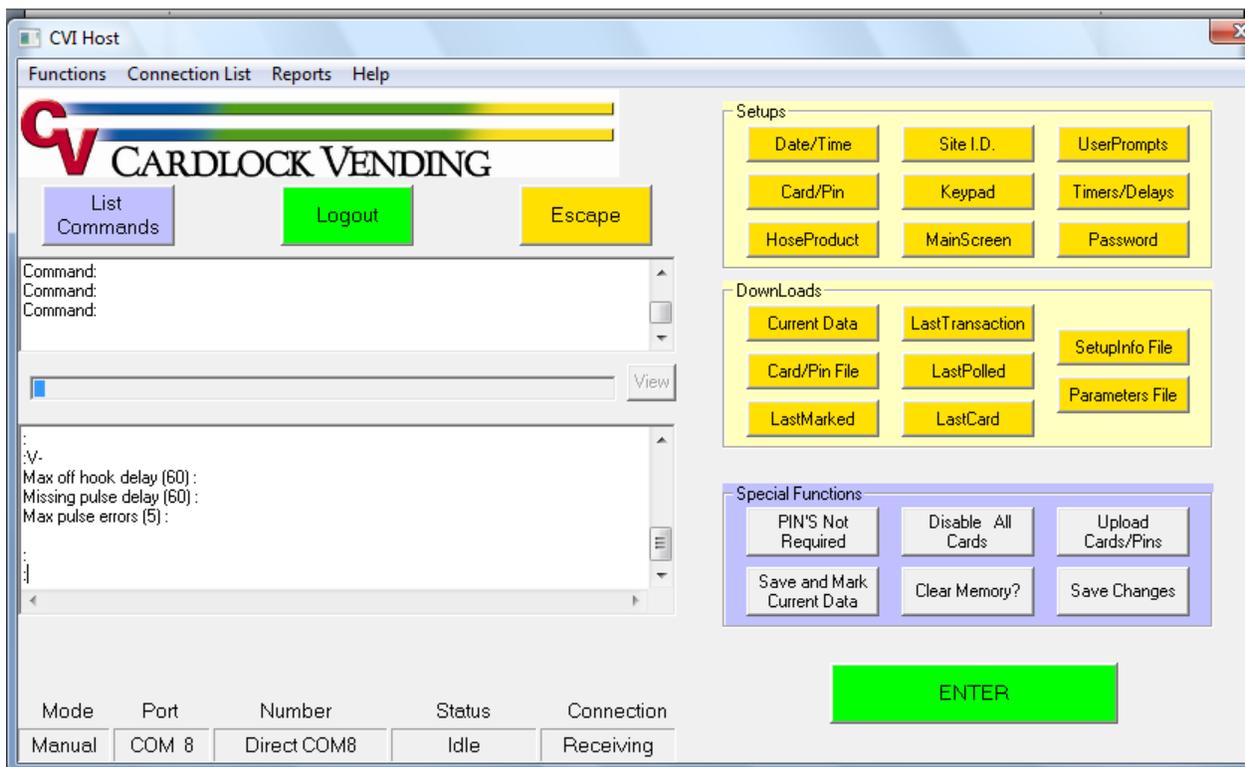
Code	Field Size	Field Descriptions – LCD displayed prompt topic
0	1 to 6 digits	By-passes the entry code , and prompts the next step “Enter Pump”
1	1 to 6 digits	Odometer reading
2	1 to 6 digits	Employee ID number
3	1 to 6 digits	Vehicle Number
4	1 to 6 digits	Misc. #
5	1 to 6 digits	* Job Number (user program, these are suggested entries)
6	1 to 6 digits	* Invoice Number
7	1 to 6 digits	* Facility Number
8	1 to 6 digits	* Group Number
9	1 to 6 digits	* Job Number

TIMERS/DELAYS

Clicking on the Timers/Delay key will display the settings for Max Off Hook delay(60) This is where you enter the maximum number of seconds (255) that the CardMaster can be approved before the handle of the pump is turned on. Entering a 0 will disable this function.

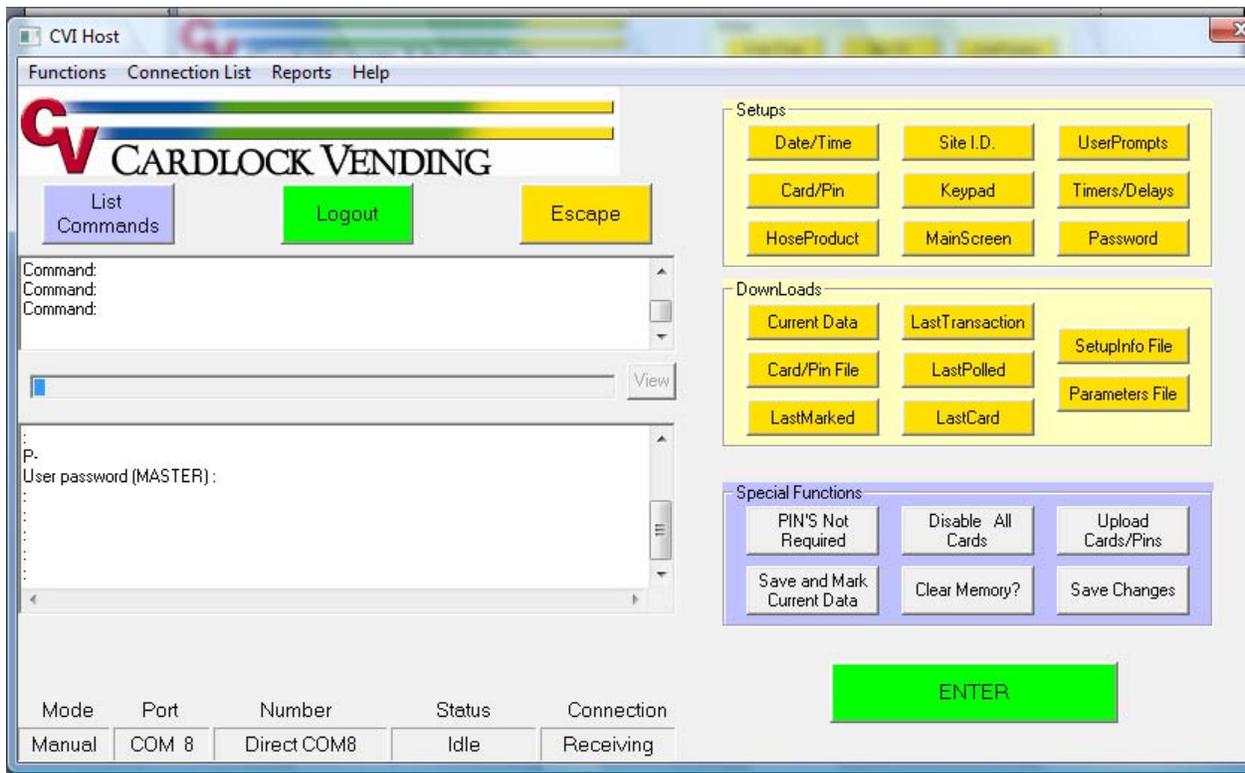
Clicking on the Enter Key will take you to the Missing Pulse delay(60) This is where you set the maximum number of seconds(255) that a sale in progress can be left with no pulses coming into the CardMaster. Entering a 0 will disable this function.

Clicking on the Enter Key will take you to Max Pulse errors This is the maximum number of missing pulse errors in a row allowed before a hose is disabled, or taken out of service. To return the unit to service after being repaired, go to the 'H' command and change the appropriate hose position from zero (0) to its proper dispenser number. In the example above, the last programmed value was 5 errors. The largest number of consecutive errors is 255. A value of zero (0) allows an infinite number of errors. To set a value, type in the maximum number of pulse errors in a row before the CardMaster disables the offending hose.



PASSWORD

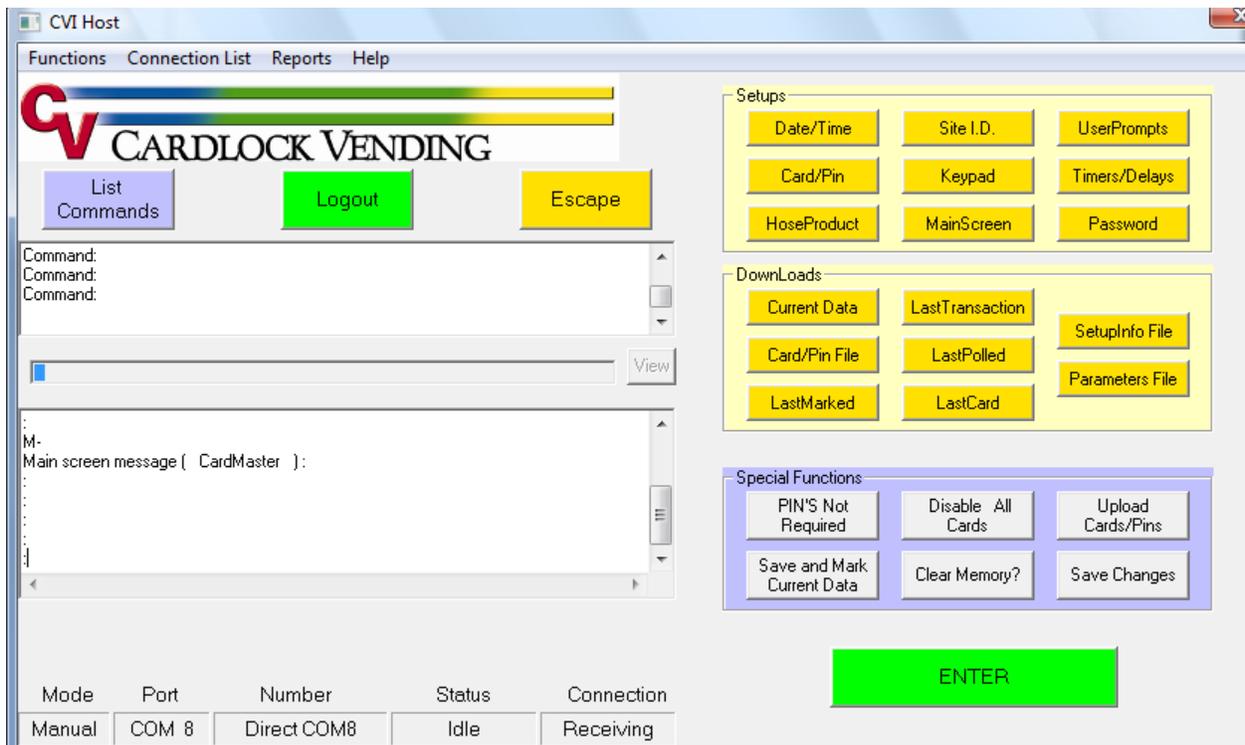
Clicking on the Password Key will bring up the function of programming your password that will be used to access the CardMaster. The default Password is MASTER. When the line appears you may type in a new Password if you wish. However, remember that if you forget your Password or enter it three (3) times incorrectly you lock yourself out of being able to access the CardMaster and you will have to contact CardLock Vending or your service advisor for help. Once you have entered your new password click on the Enter key and the cursor will appear below the programming line.



Main Screen

Clicking on the MainScreen Key will display the programming line where you will program the first message the operator will see on the CardMaster Screen. This is usually the name of the company that owns or is operating the CardMaster. This name is limited to 16 characters.

Once you have entered the name click on the Enter Key and the cursor will move below the line.

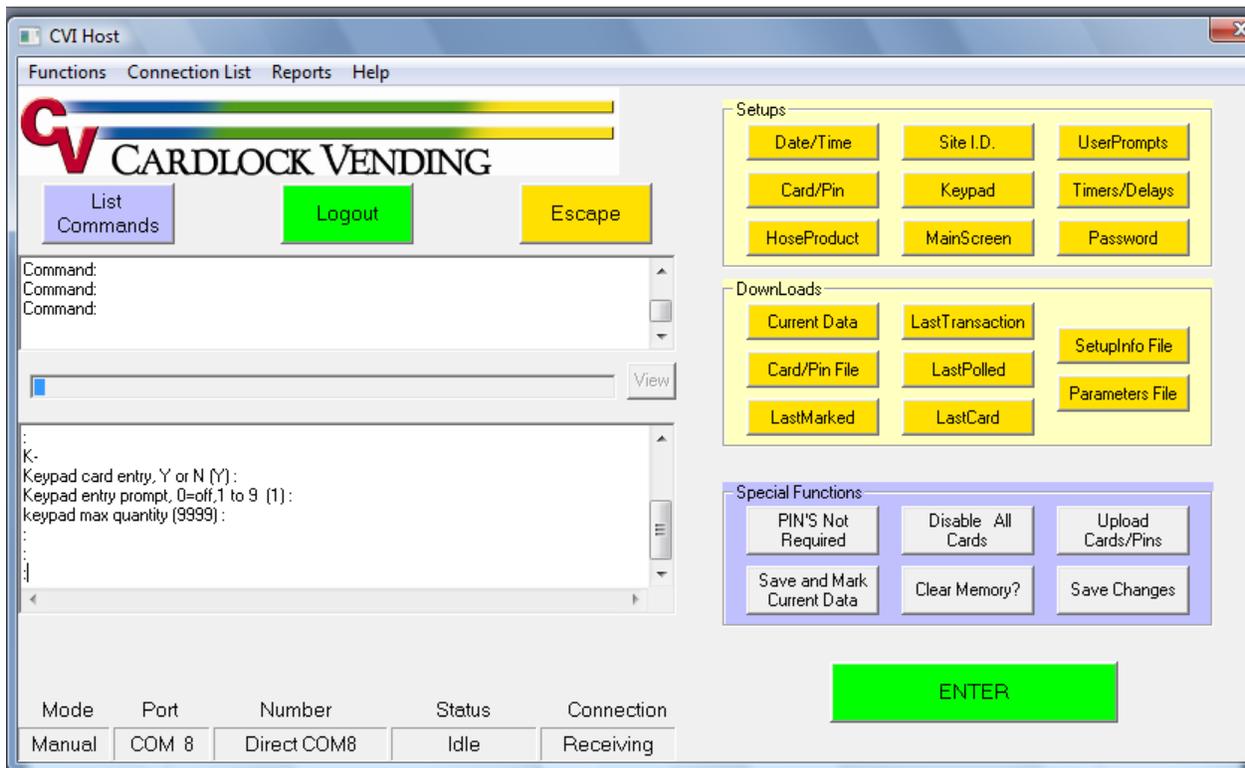


KEYPAD ENTRY

Clicking on the Keypad key will display the programming functions of Keypad operation.

The first line to appear is Keypad card entry, Y or N (Y). Entering a Y will allow access to hose functions at the CardMaster by entering the Card Number rather than swiping a card. Entering a N will allow access to Hose functions at the CardMaster by only using a card. Clicking on the Enter Key after entering a Y will display the Keypad entry prompt, 0=off, 1 to 9 (1). This is where you program the first user prompt if using the Keypad to enter Card numbers rather than using a card. Refer to the User Prompt Section for entry prompt definitions. Clicking on the Enter Key will display the key pad max quantity (9999). The factory default is 9999 units. You may decide on a lesser quantity if you wish. Enter the quantity and then click on the enter key.

ALL ITEMS PROGRAMMED IN THIS AREA WILL AFFECT ALL USERS.



HOSE PRODUCT

Clicking on the HoseProduct key will display the programming functions for your fuel positions. There are two positions available in CardMaster and they are defined as hoses.

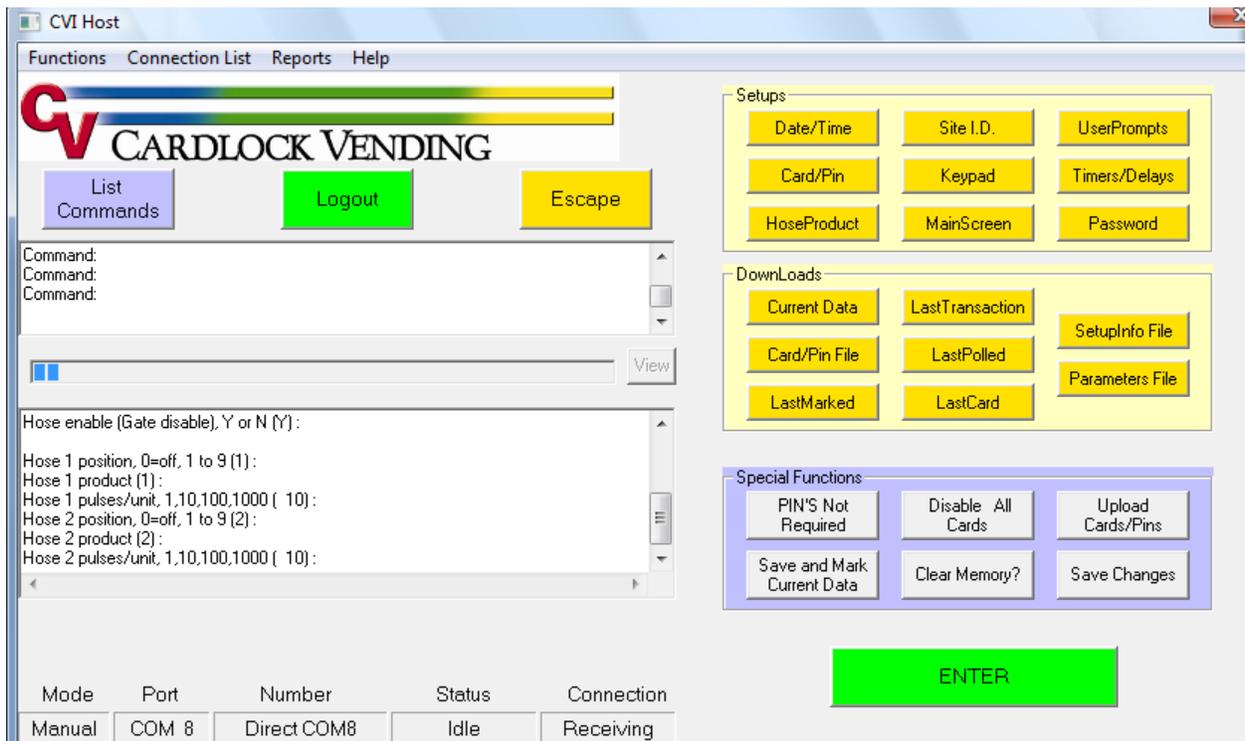
The line displayed is Hose enabled (Gate Disabled), Y or N, (Y). Entering Y at this point tells the CardMaster that you will be using the unit to control hoses rather than Gates, doors and other devices.

The next line to appear after clicking on the Enter Key will be

Hose 1 Position 0=off , 1 to 9 (1) Enter the number to be assigned to the first hose and click on the Enter Key.

Next line is Hose 1 product (1) Enter the number of the product to be dispensed from this hose. Click the Enter Key

Next line is Hose 1 pulses/unit, 1,10,100, 1000 (10) You must determine how many pulses your hose pulser is putting out per unit. Normally it is 10, but can be 1, or 100. Although 1000 pulse are displayed here the CardMaster can not take a 1000 pulse input. Click on Enter and Hose 2 appears. Follow the instructions above for Hose 1. Then click the Enter Key.



CARD/PIN

Clicking on the Card/Pin key will display the card pin programming function. You will have displayed the following lines:

E

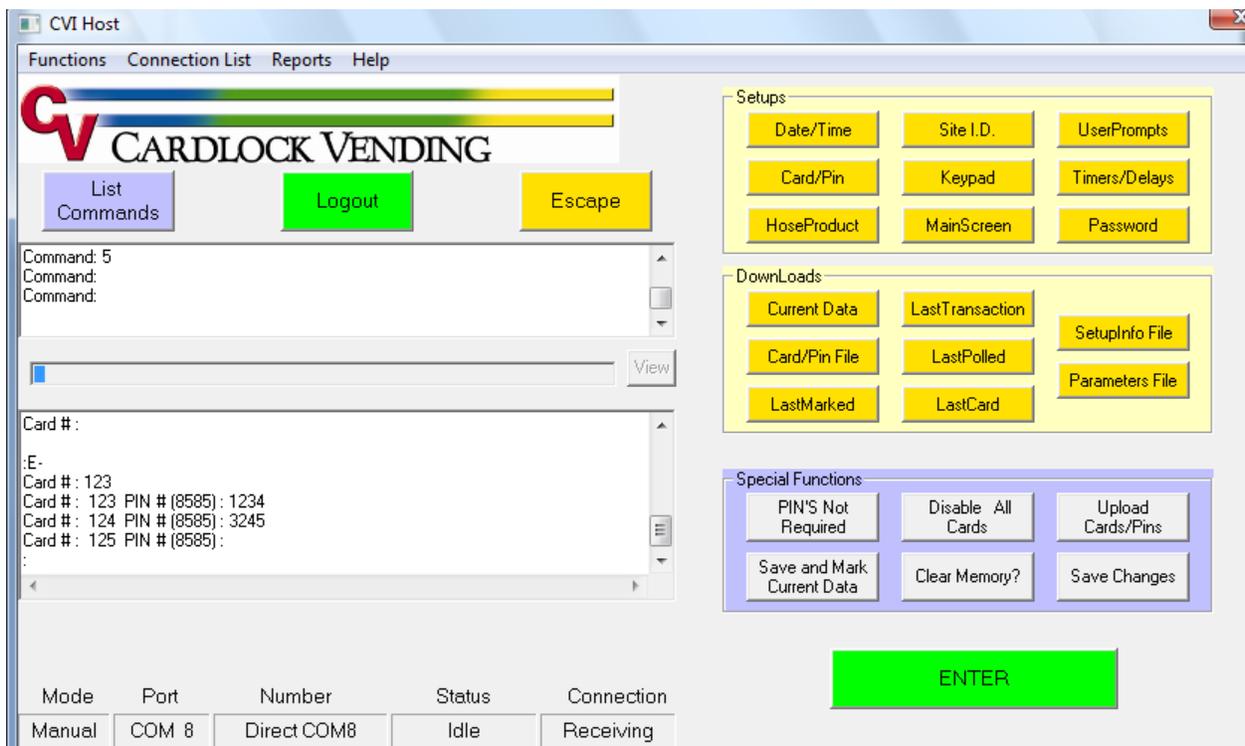
Card #: At this point enter the card you wish to program a PIN for and click the Enter key

Then you will be displayed the following line

Card # : card number xxx PIN # (xxxx): Enter the PIN you wish for this card number and then click the Enter Key

The next card in sequence will be displayed for it PIN programming. If you wish to stop here the just click on the Enter key or the Escape key.

All cards must be programmed at this function and in this manner for the first time. Once you have completed the card PIN file Programming you may download the file to a folder stored under the Reports TAB. You may edit a card PIN number in the file or through the function key.

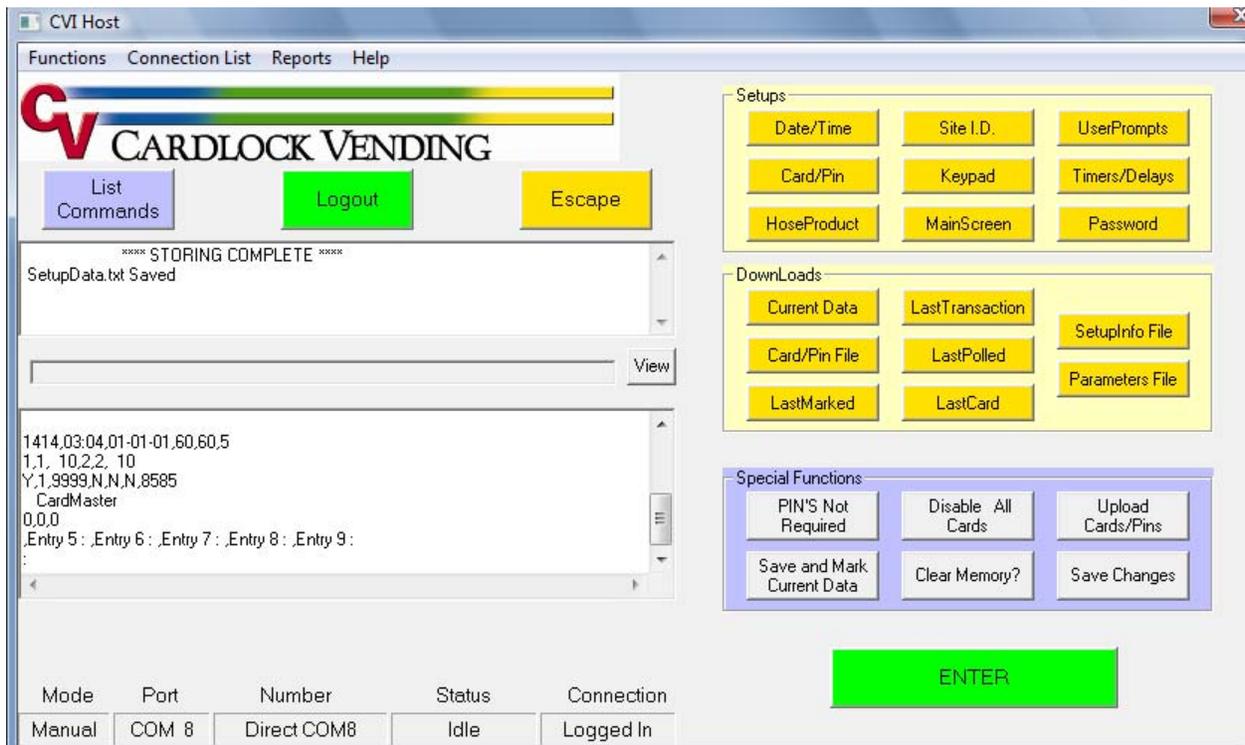


DOWNLOAD FUNCTIONS

THE SPEED AT WHICH THE DOWNLOADS TAKE WILL VARY
DEPENDING ON YOUR PC, YOUR OPERATING SYSTEM, AND YOUR
FORM OF COMMUNICATION

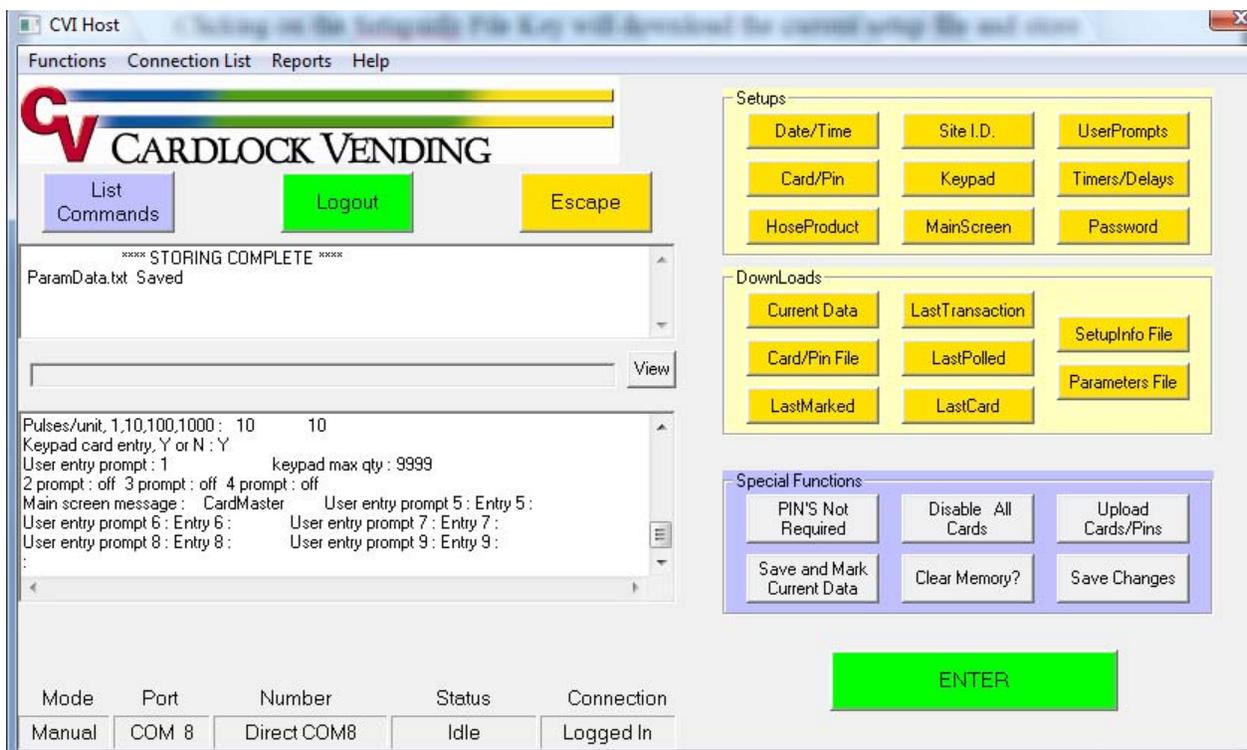
SETUP INFO FILE

Clicking on this key will download the current Setup file to a folder located under the Reports TAB. This is for reference only and would be used if the CardMaster would need to be reprogrammed.



PARAMETER FILE

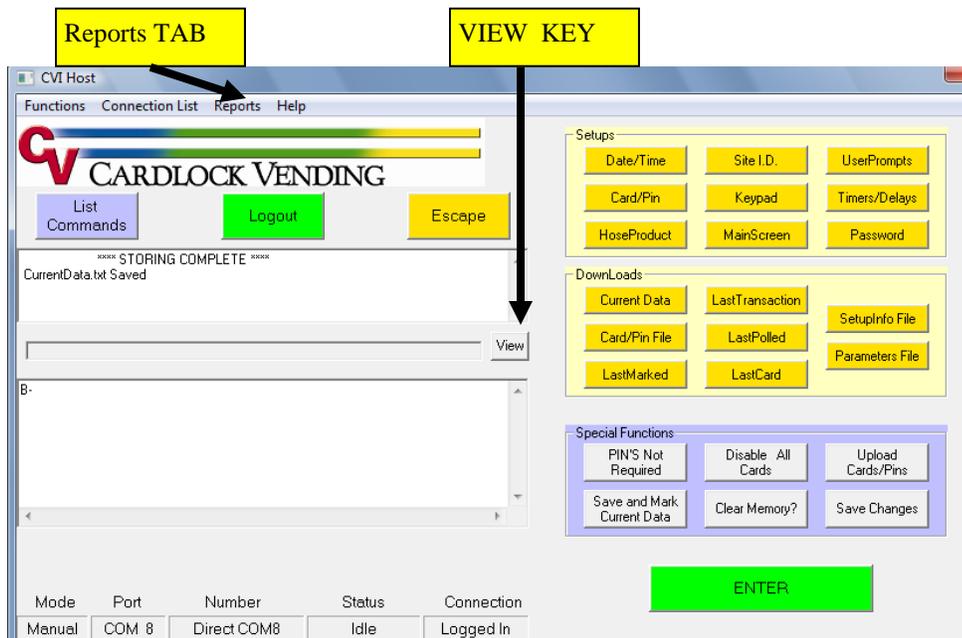
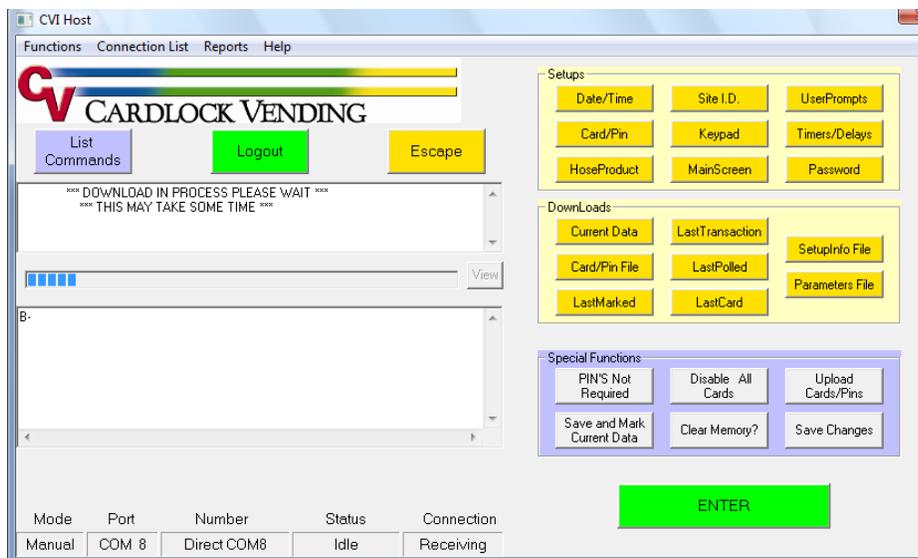
Clicking on this Parameter key will download the current programmed parameters to a folder located under the Reports TAB. This is for reference only and would be used if the CardMaster would need to be reprogrammed.



CURRENT DATA

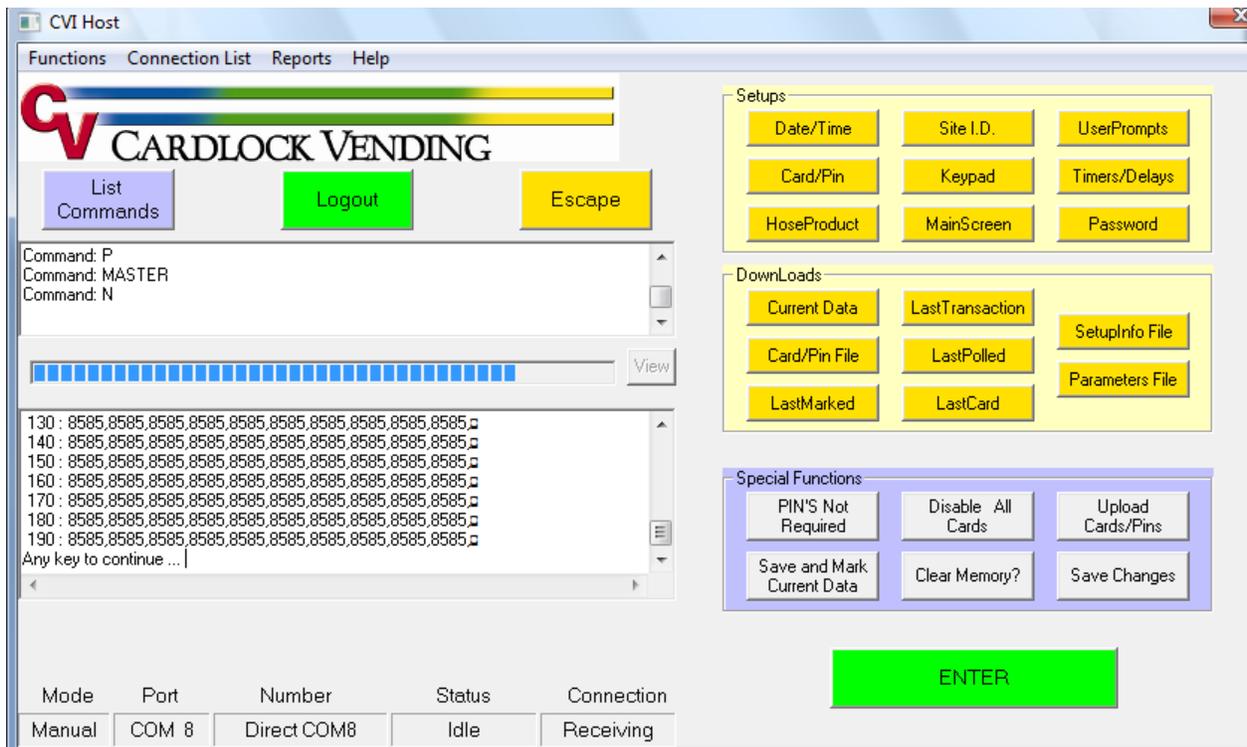
Clicking on the Current Data key will download the current transaction file to a folder under the Reports TAB named Current data. This can be viewed at the end of the download by clicking on the View key or by clicking on the Reports TAB.

CARE MUST BE TAKEN TO WATCH THE PROGRESS BAR OR THE STATUS BAR. TRYING TO PERFORM ANOTHER TRANSACTION WHILE A DOWNLOAD IS IN PRGRESS MAY CAUSE THE PROGRAM TO SHUTDOWN. IF THIS OCCURS THE DATA WILL NOT BE STORED AND YOU WILL HAVE TO RESTART THE CM HOST.



CARD/PIN FILE

Clicking on the Card/PIN File key will start the download of the current PIN file and the file will be stored for viewing or editing under the Reports TAB. The PINS are downloaded in 200 card increments. You must click on the Enter Key after each increment until the download is finished. Failure to finish the download will result in the PIN file not being stored.

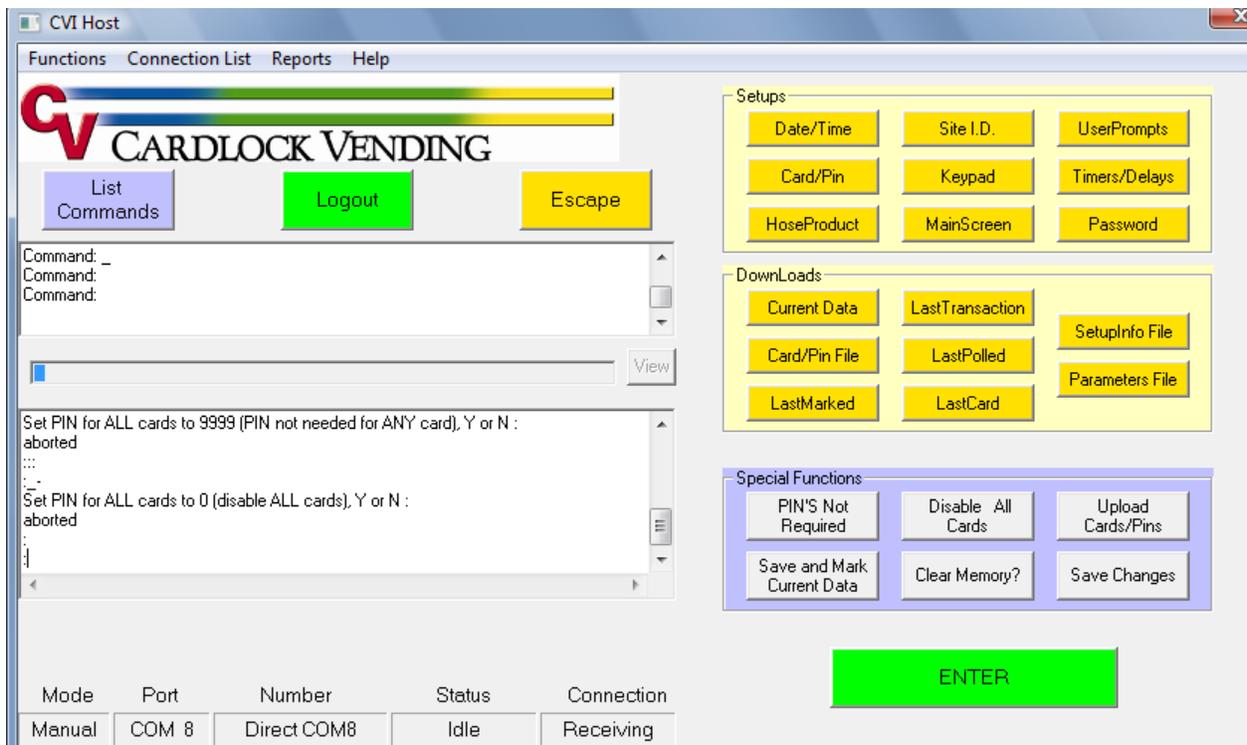


SPECIAL FUNCTIONS

THE SPEED AT WHICH THE UPOADS TAKE WILL VARY
DEPENDING ON YOUR PC, YOUR OPERATING SYSTEM, AND YOUR
FORM OF COMMUNICATION

PINS NOT REQUIRED DISABLE ALL CARDS

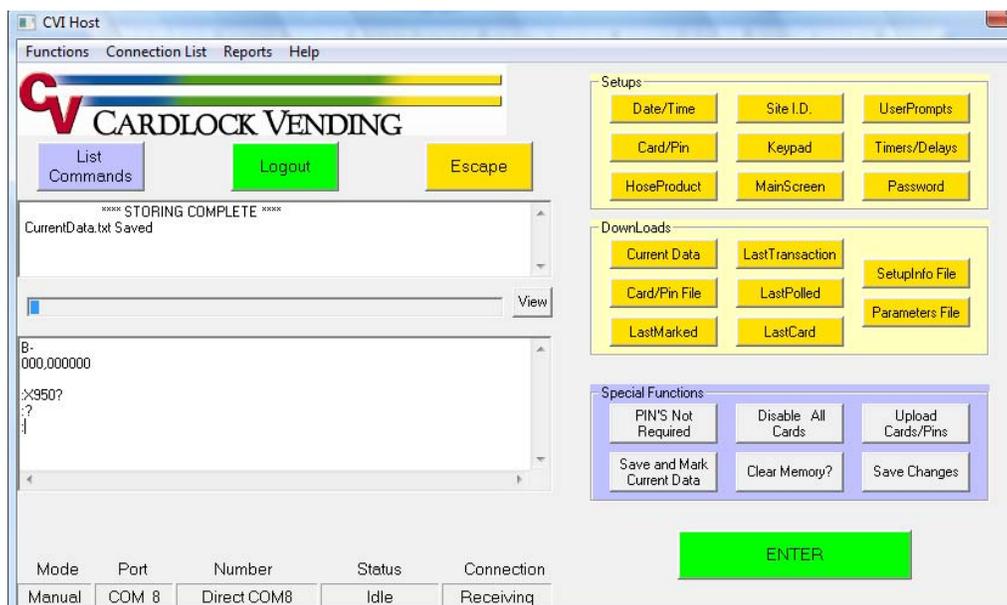
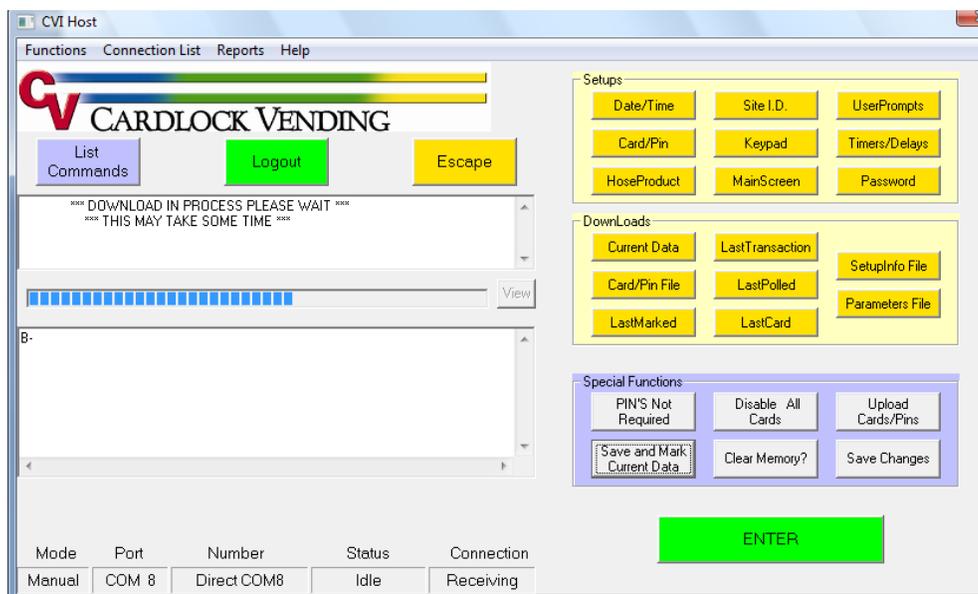
Clicking on the PINS Not Required key will display the following line:
Set PIN for ALL cards to 9999, Y or N Typing Y will set all the PINS to 9999 and all cards will have access to the CardMaster without the need for a PIN.
Clicking on the Disable All Cards will display the following line:
Set PIN for ALL cards to 0 Clicking on Y will cause the PIN for all cards to be set to 0000. No card will have access to the CardMaster.



SAVE AND MARK CURRENT DATA

Clicking on this key will start the download of the current file, save it in a file named Manual data under the Reports TAB and mark the file for the next transaction number and report period.

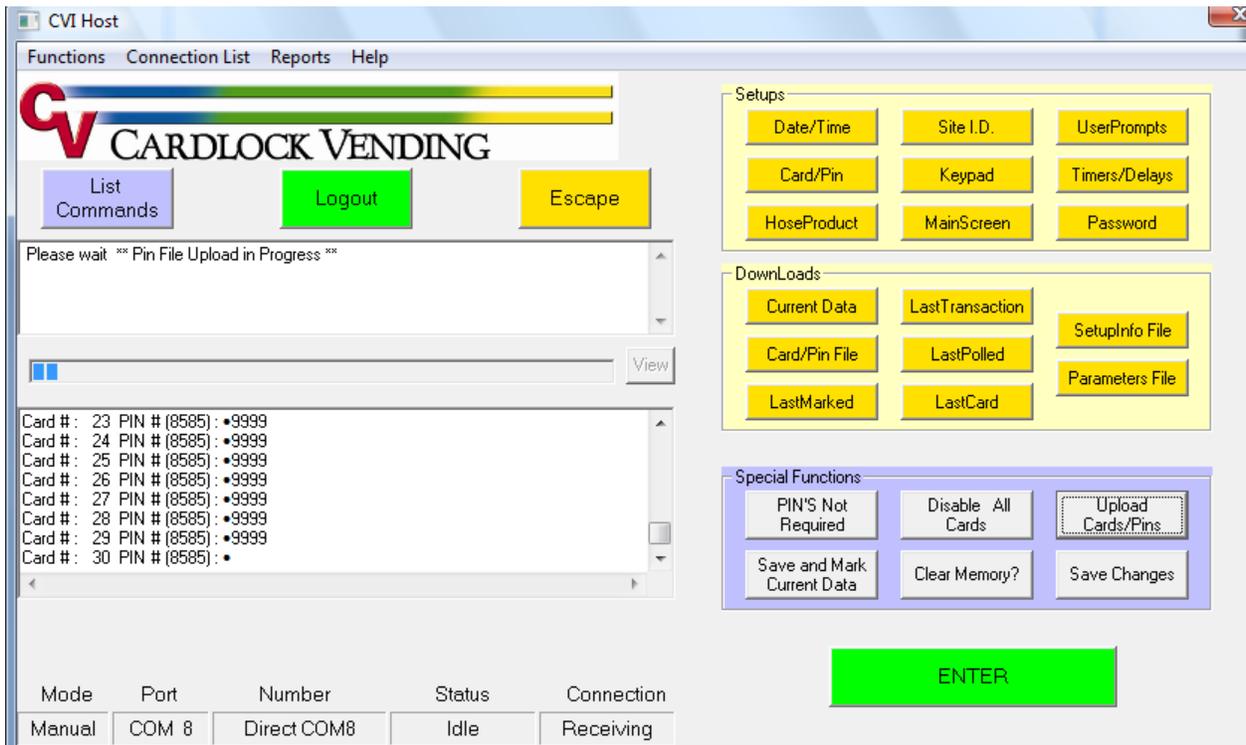
CAUTION SHOULD BE TAKEN NOT TO TRY AND INITIATE ANOTHER FUNCTION WHILE A DOWNLOAD IS IN PROGRESS. THIS COULD CAUSE THE PROGRAM TO SHUTDOWN AND NO DATA WILL BE STORED.



UPLOAD CARDS/PINS

Clicking on this key will start the upload of the PIN file stored from your previous download. If there is no PIN file downloaded the program will abort and tell you the file does not exist.

THE SPEED AT WHICH THE UPLOAD TAKES WILL VARY DEPENDING ON YOUR PC, YOUR OPERATING SYSTEM, AND YOUR FORM OF COMMUNICATION

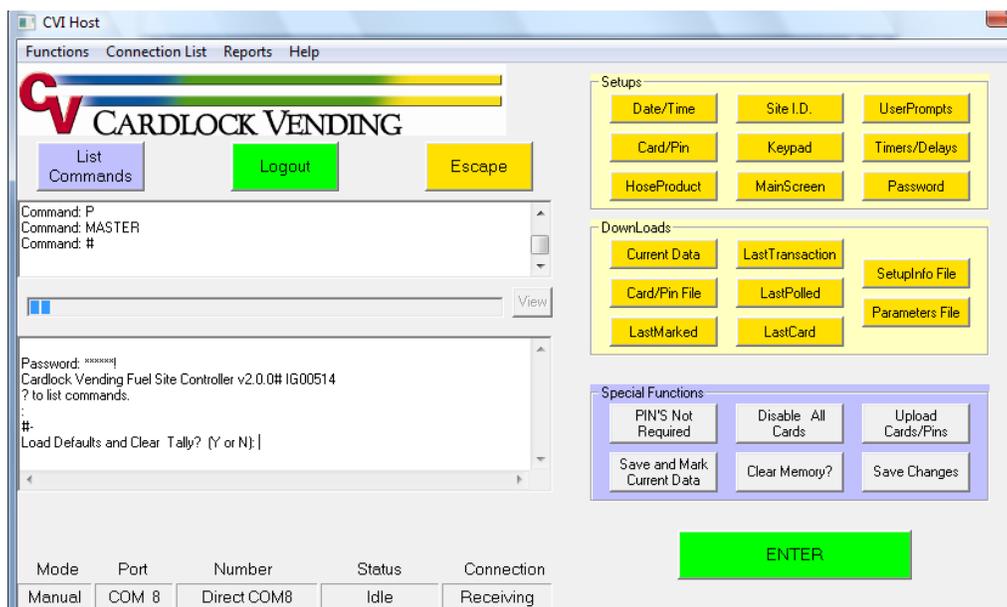
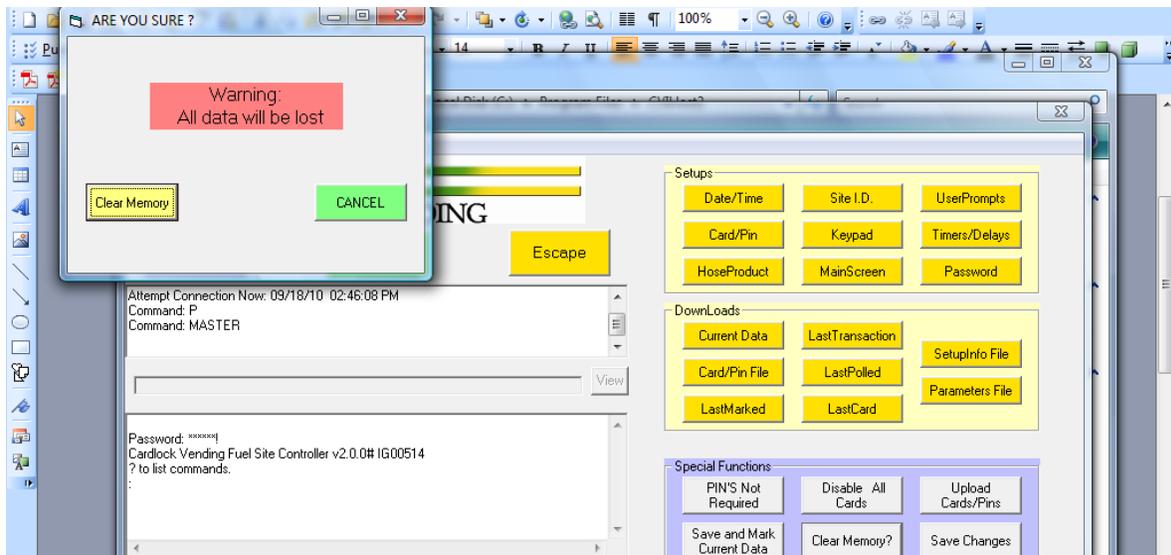


CLEAR MEMORY

Clicking on the Clear Memory key will display the screen below.
Clicking on the Clear Memory KEY in the screen will display the second screen below. Answering with a Y and the Enter key will load all the factory defaults and clear your transaction memory.

CAUTION

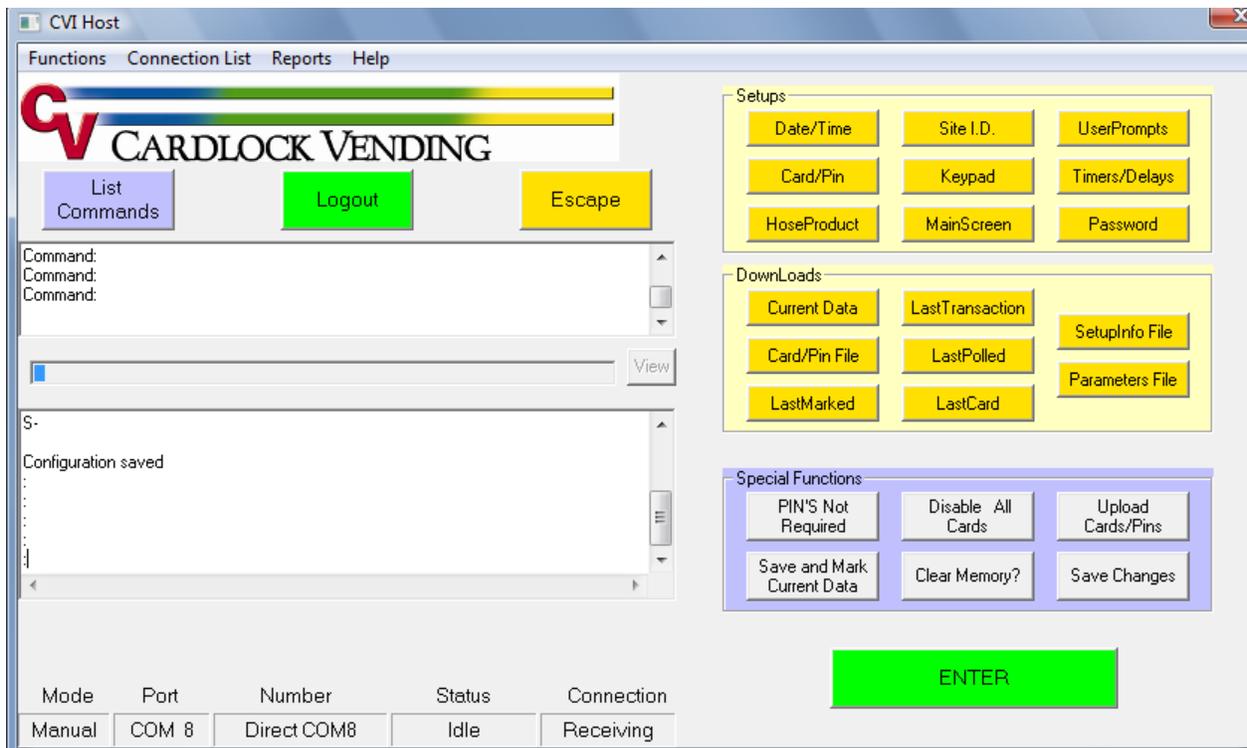
USE OF THIS SPECIAL FUNCTION SHOULD ONLY BE USED WHEN SETTING UP A CARDMASTER FOR THE FIRST TIME OR WHEN A CARDMASTER NEEDS TO BE REPROGRAMMED.



SAVE CHANGES

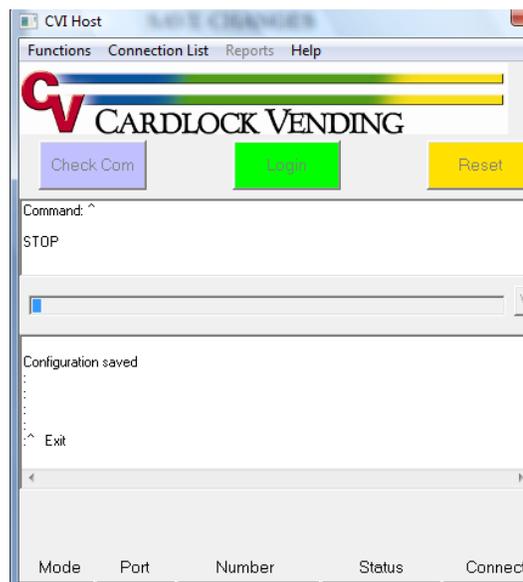
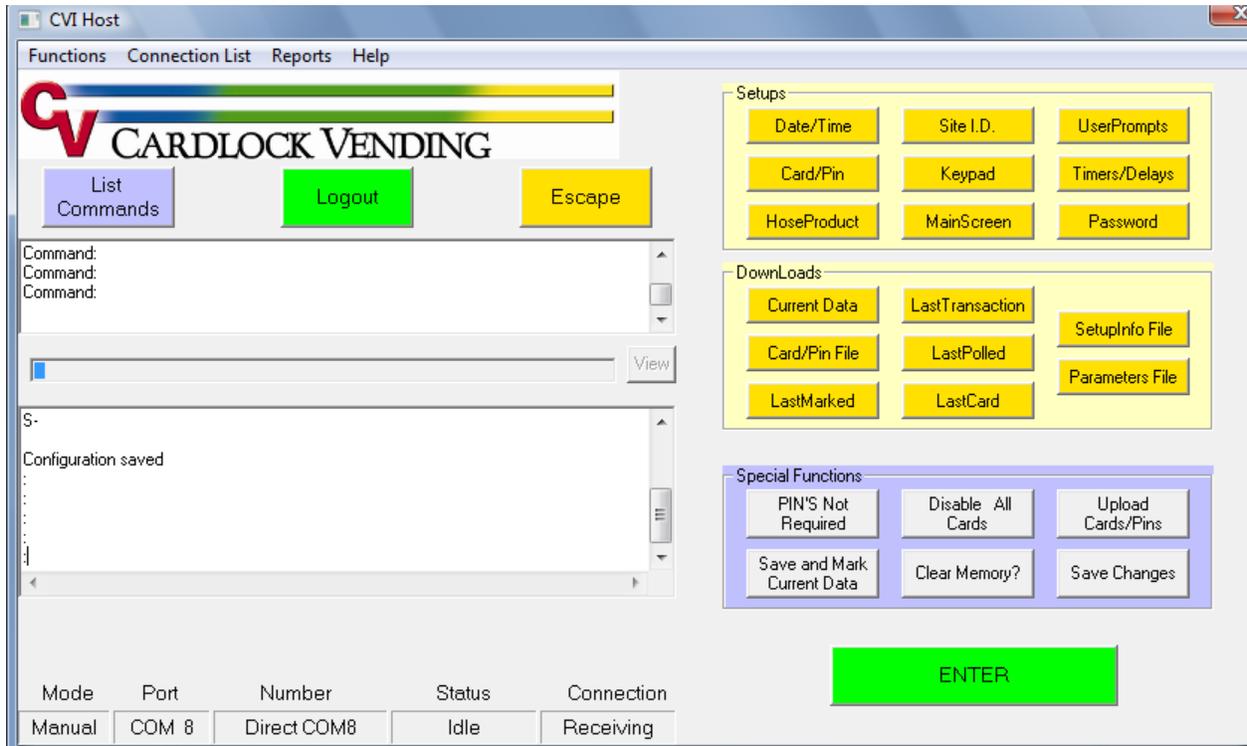
Clicking on this key will save any changes you have previously made to the CardMaster programming.

This key should be clicked anytime you make a change to the CardMaster.



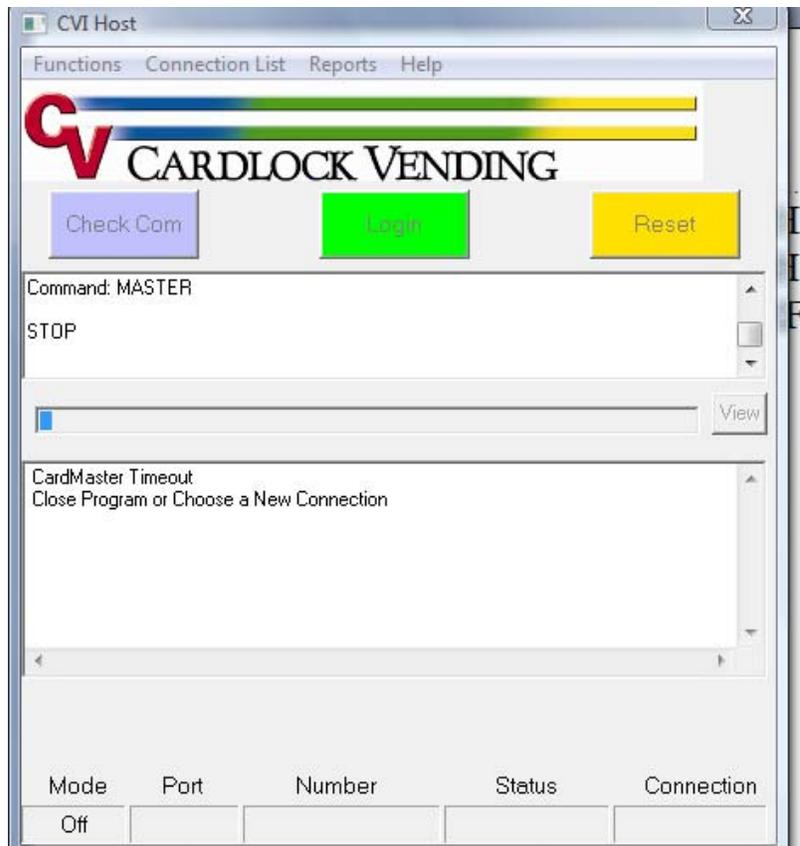
LOGOUT

Click on the Logout key when you are finished performing the functions you have accessed the CardMaster for. Once you have clicked on the Logout key the exit response will be displayed. You may shut down the CM Host at this time. This could take as much as 20 seconds as the Host is verifying that the ports are closed.



CARDMASTER TIMEOUT

If for any reason you leave the computer with the Host is Open and do not perform a task for a period of time the CardMaster will time out and you will receive the message displayed below. You will have to exit the program, reopen it, reconnect, and log back in to access the CardMaster in order to complete any task you were performing.



After leaving CM Host you may view your reports by opening the Reports shortcut on you desktop.

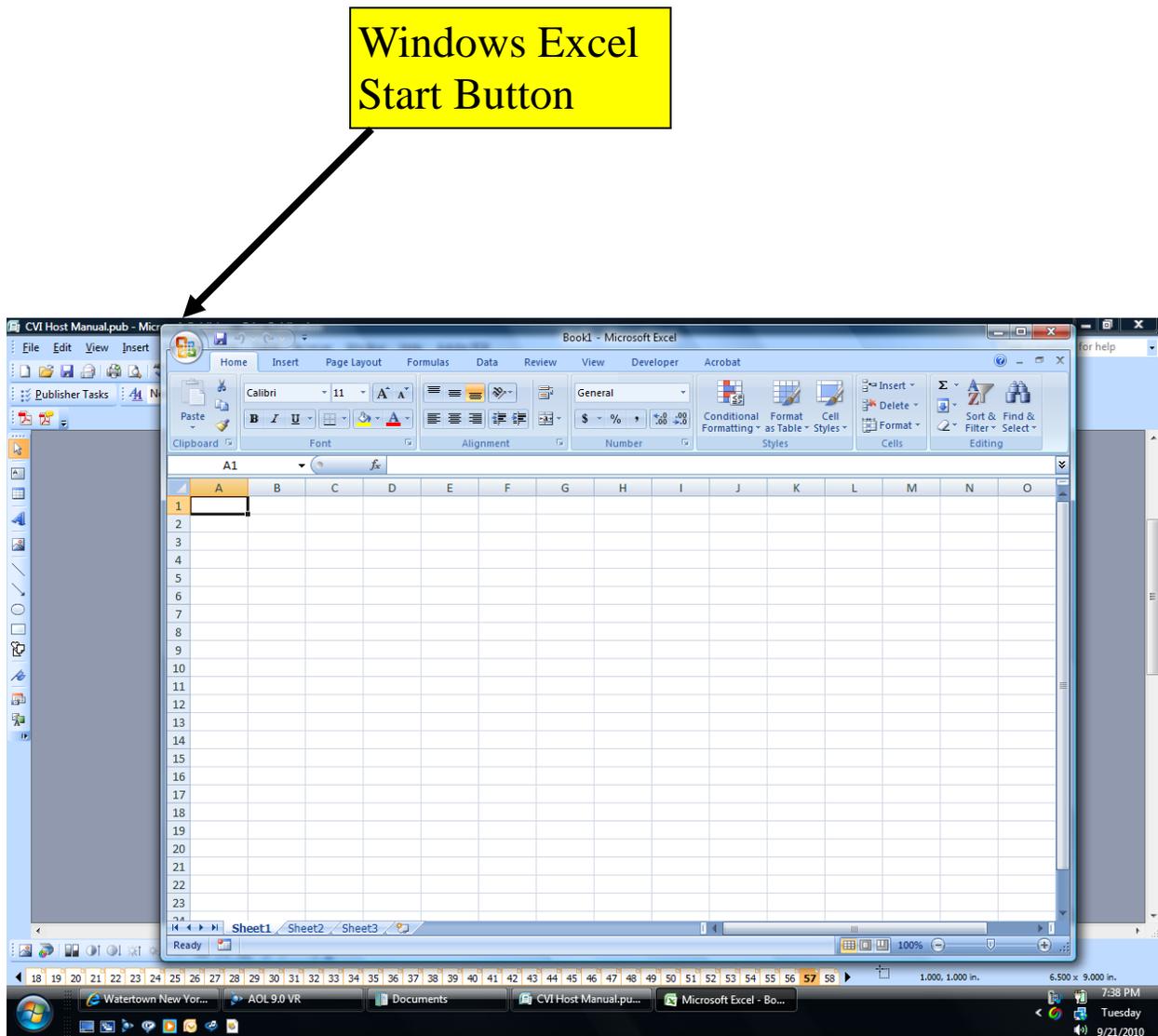
CARDTRANSPORTER

You must have Microsoft Office 2003, 2007 or 2010 to run CardTransporter,

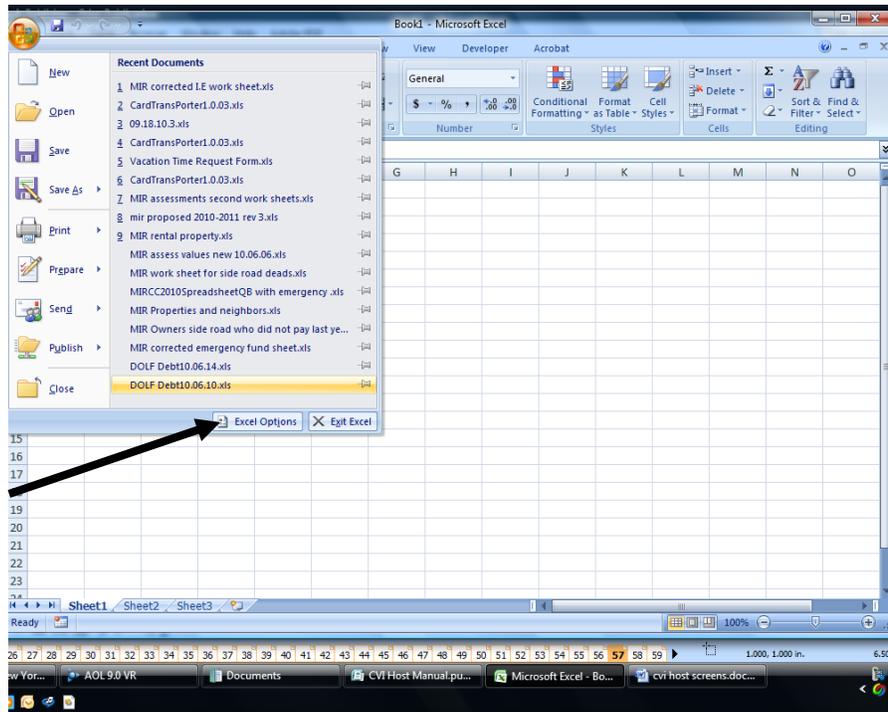
You must set the Macro Security Level in Excel 2003 to medium and in Excel 2007 and 2010 to allow macros.

To do this in 2007 and 2010 open you excel program.

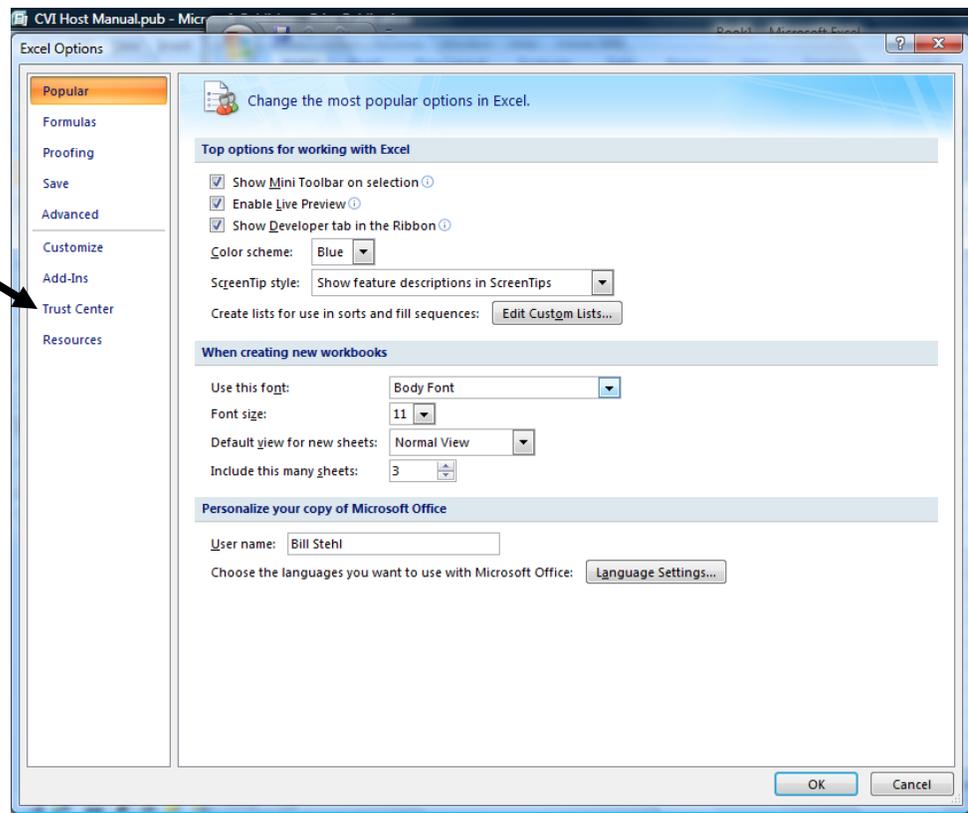
Click on the Windows Start Button



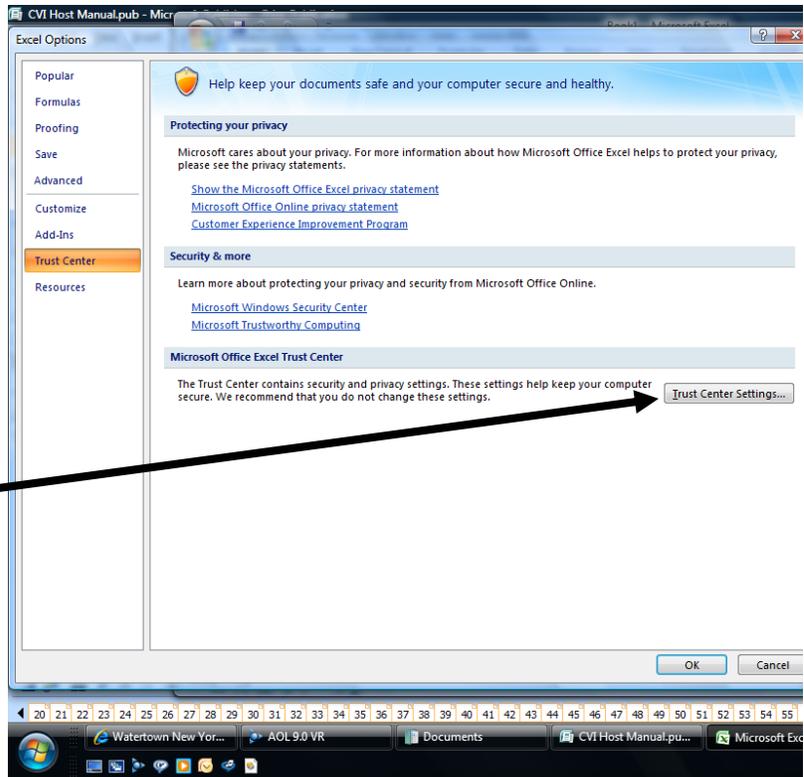
When the screen shown below appears Click on Excel Option Key



Click on the Trust Center Key



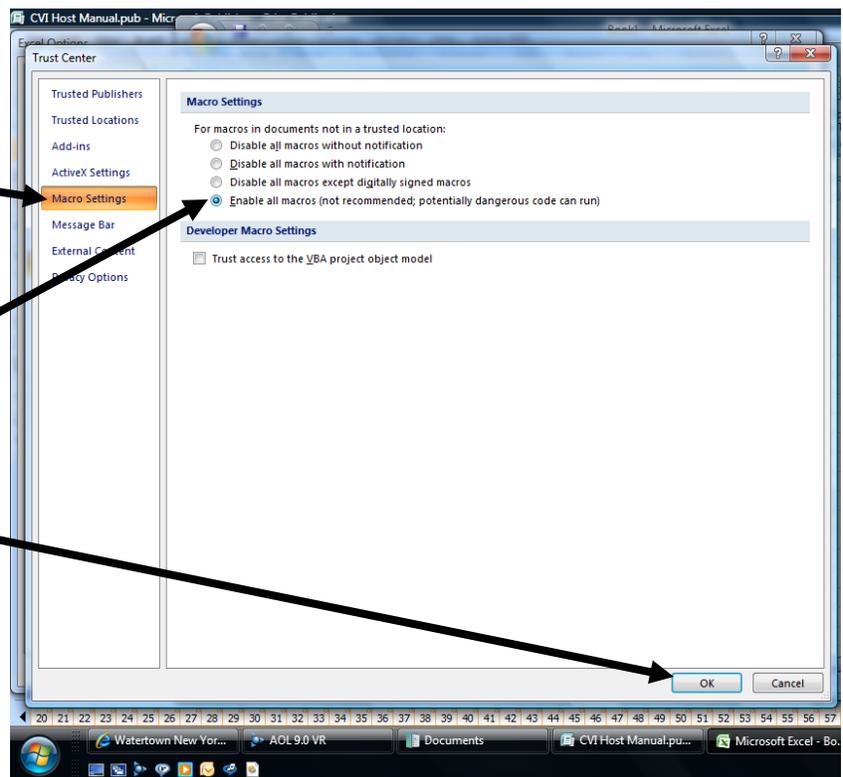
Click on the Trust Center Settings



Click on the Macro Settings

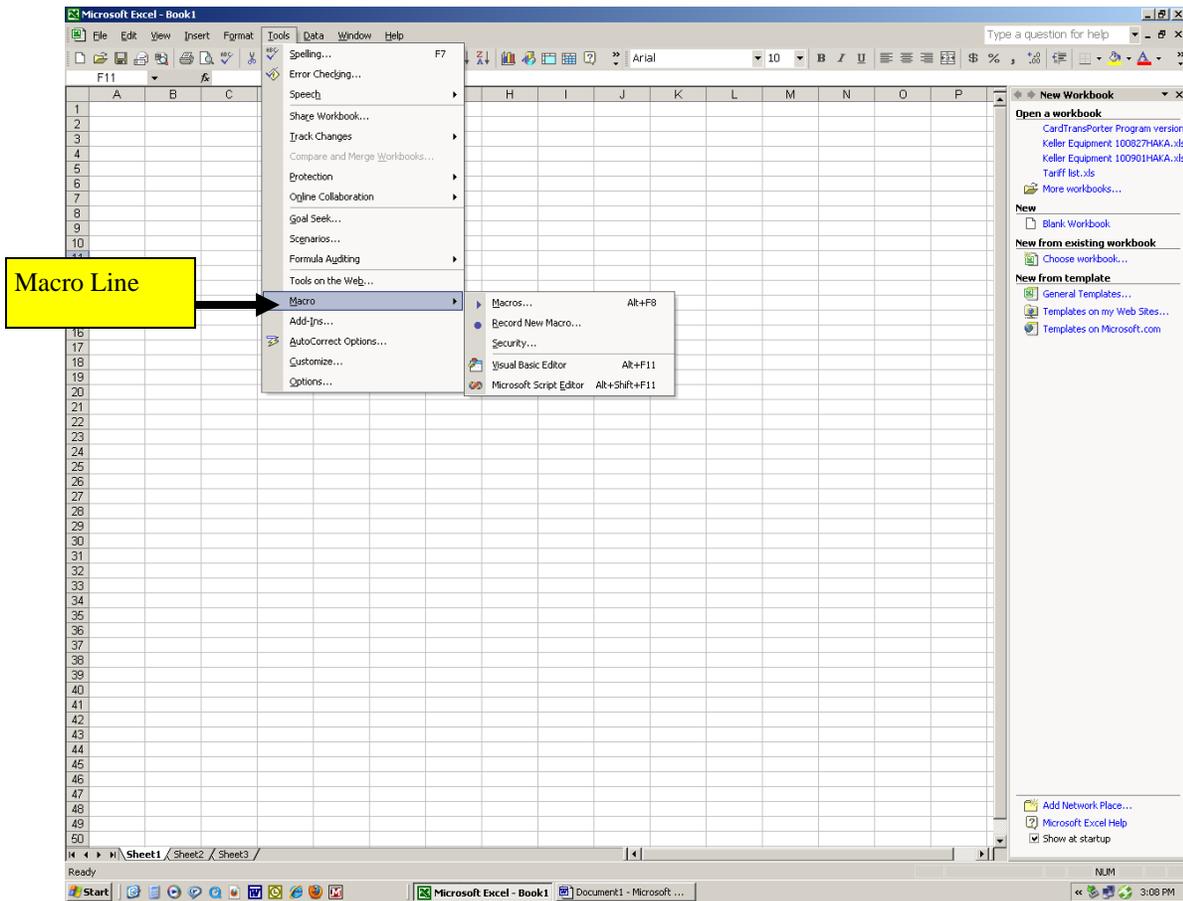
Click on Enable All Macros

Then Click OK and close Excel

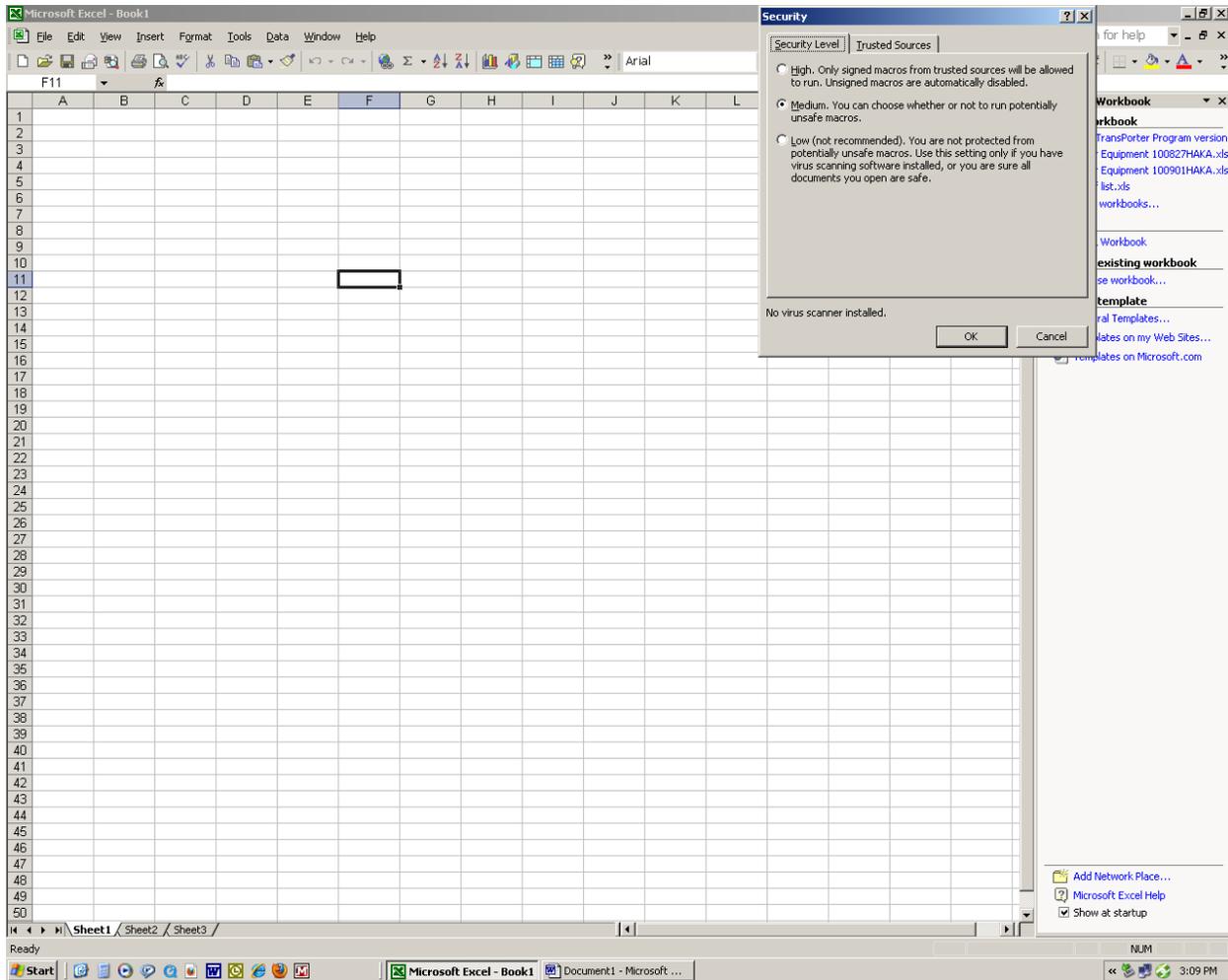


Excel 2003 Users:

Open Excel 2003 and click on the Tools Tab in the Tool Bar.
Then move the cursor to the Macro line. Then Click on the Security line.



Once you have clicked on Security the following screen will appear. Click on the button for Medium and then click OK. Close Excel 2003 down now.

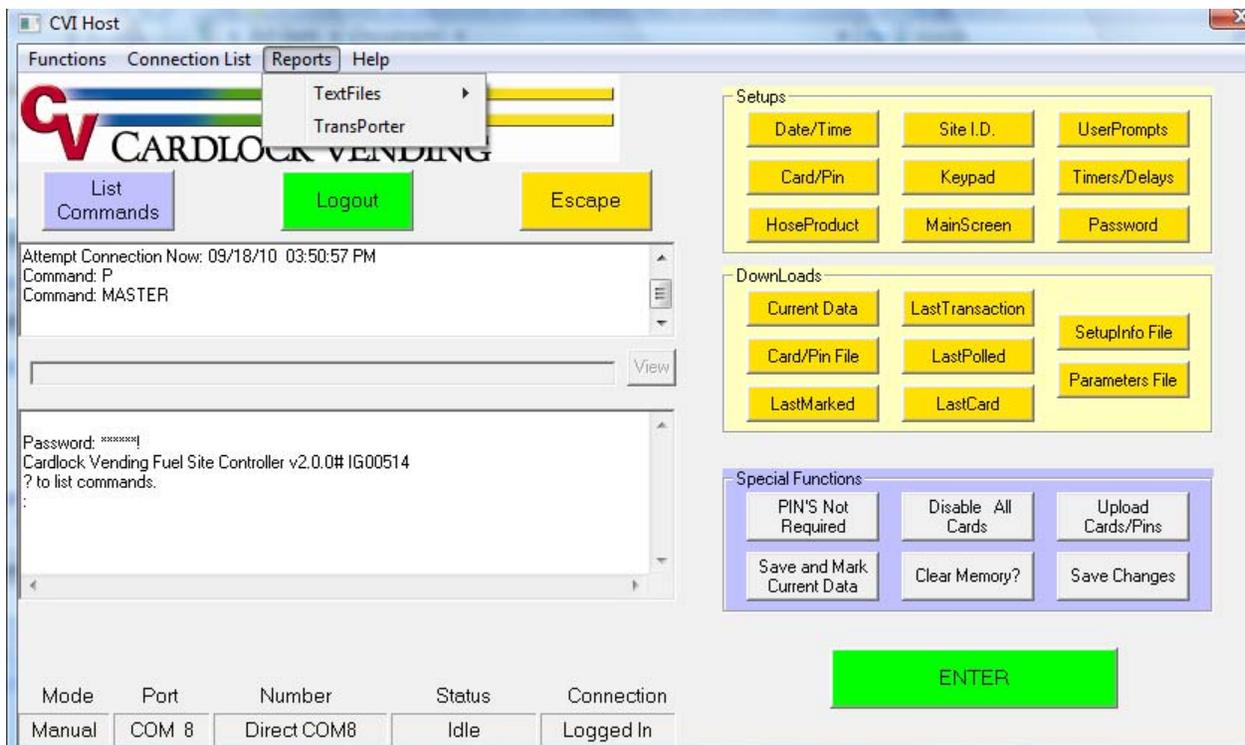


CARDTRANSPORTER

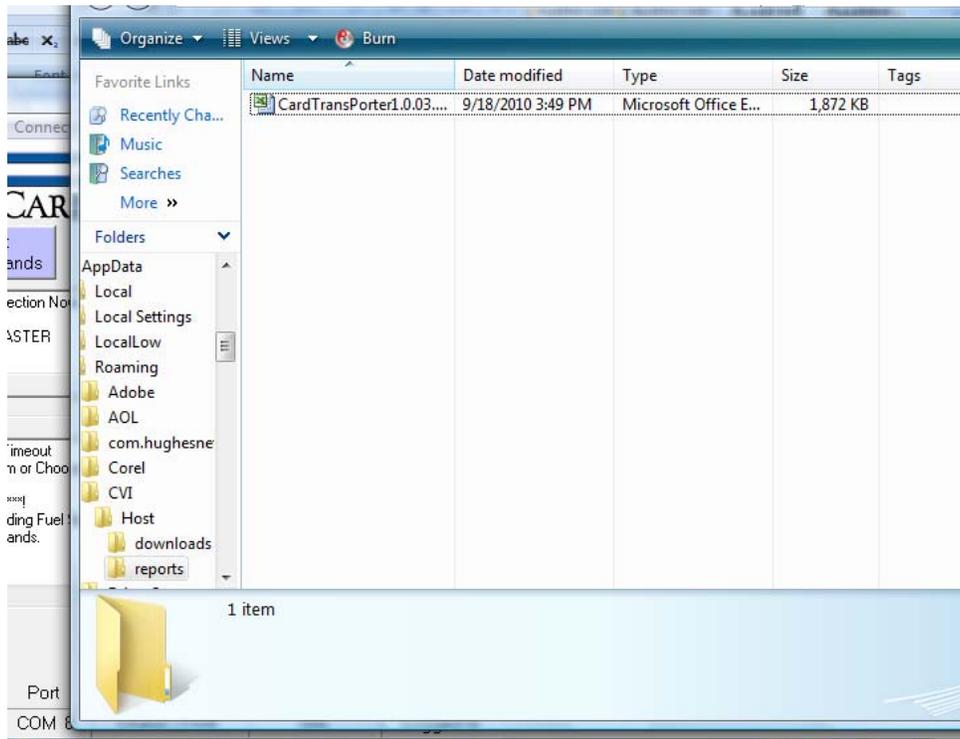
CardTransporter is an Excel based program that provides formatting and some sort functions for the raw Ascii formatted data that is stored in the CardMaster.

To access the CardTransporter program you must have CM Host open and connected to the CardMaster.

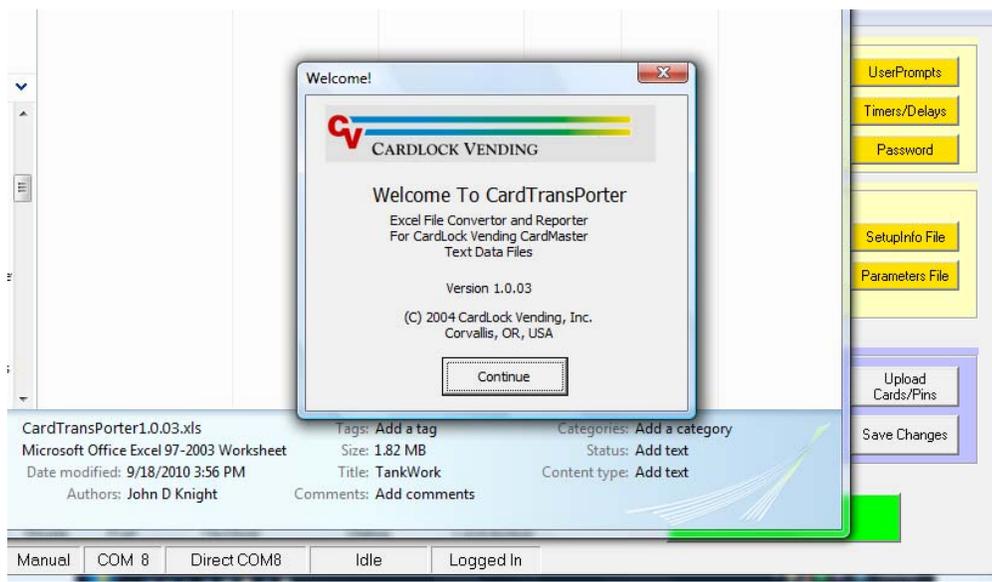
Click on the Reports TAB and the drop down window will appear. Click on CardTransporter



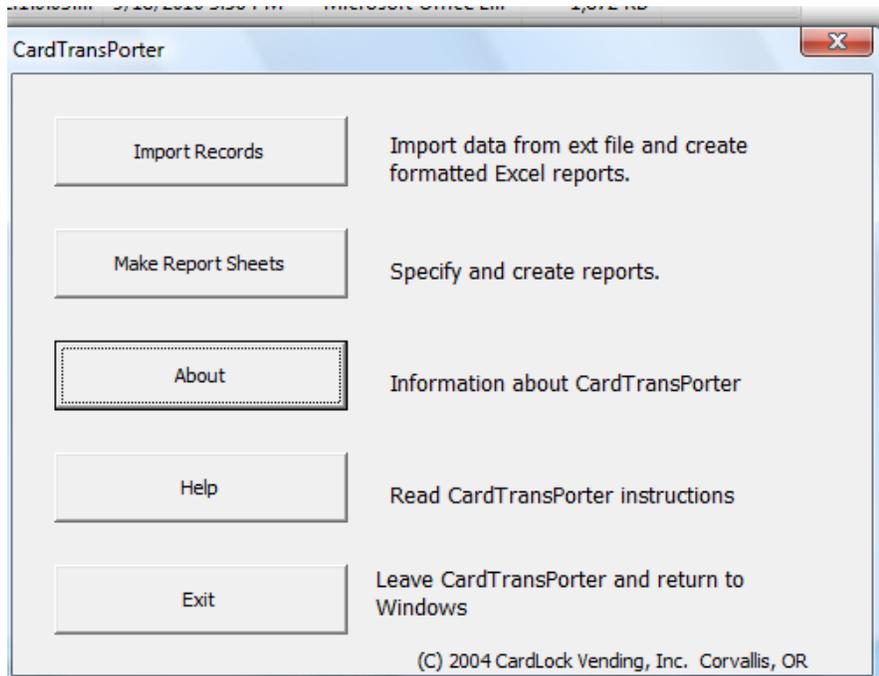
Once you have clicked on the CardTransporter TAB the you will see the following screen. Click on the Excel file and open it.



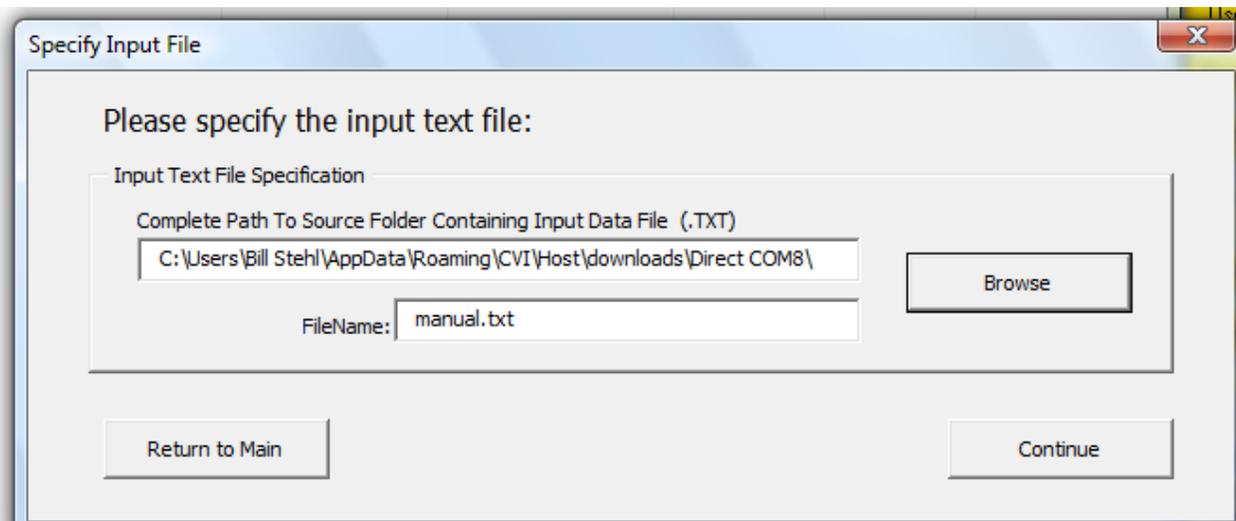
The following screen will appear and click on the Welcome Key



After clicking the Welcome key the following screen will appear.
Click on the Import Records key

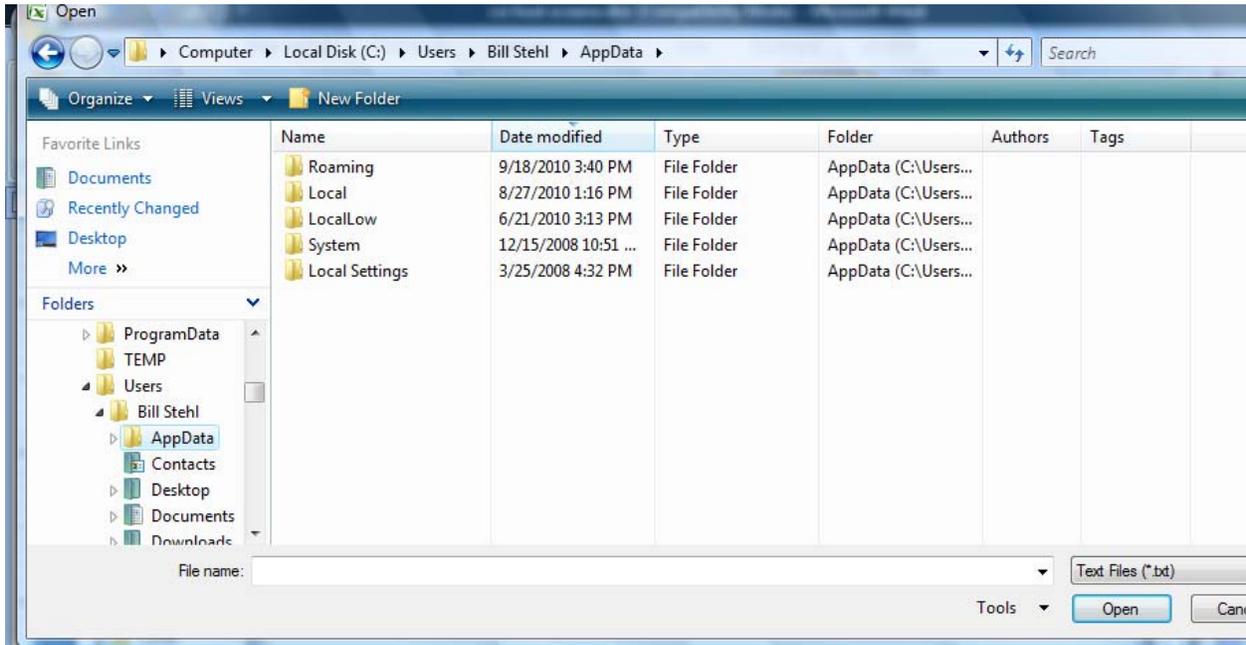


The screen below will appear. You must now create the file path to the downloaded current data that was done when connected to the CardMaster.
Click on Browse and follow the instructions on the coming pages/

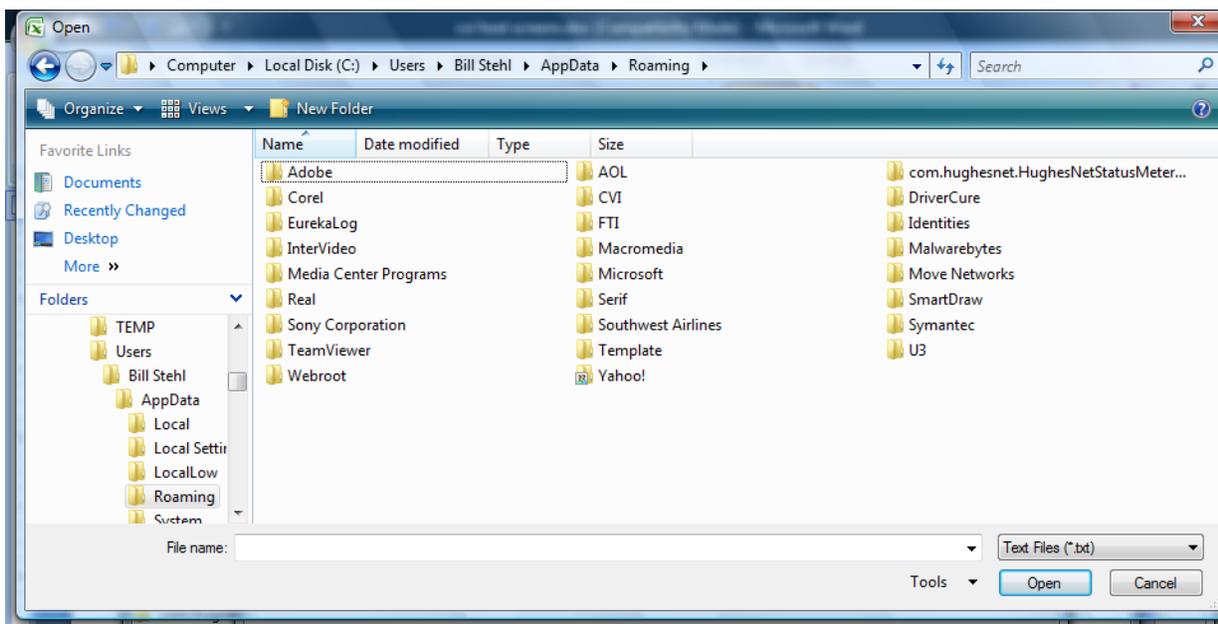


You need to access the AppData file referred to earlier in the manual. This will vary from operating system so refer the earlier part of the manual to know how to get to the AppData file.

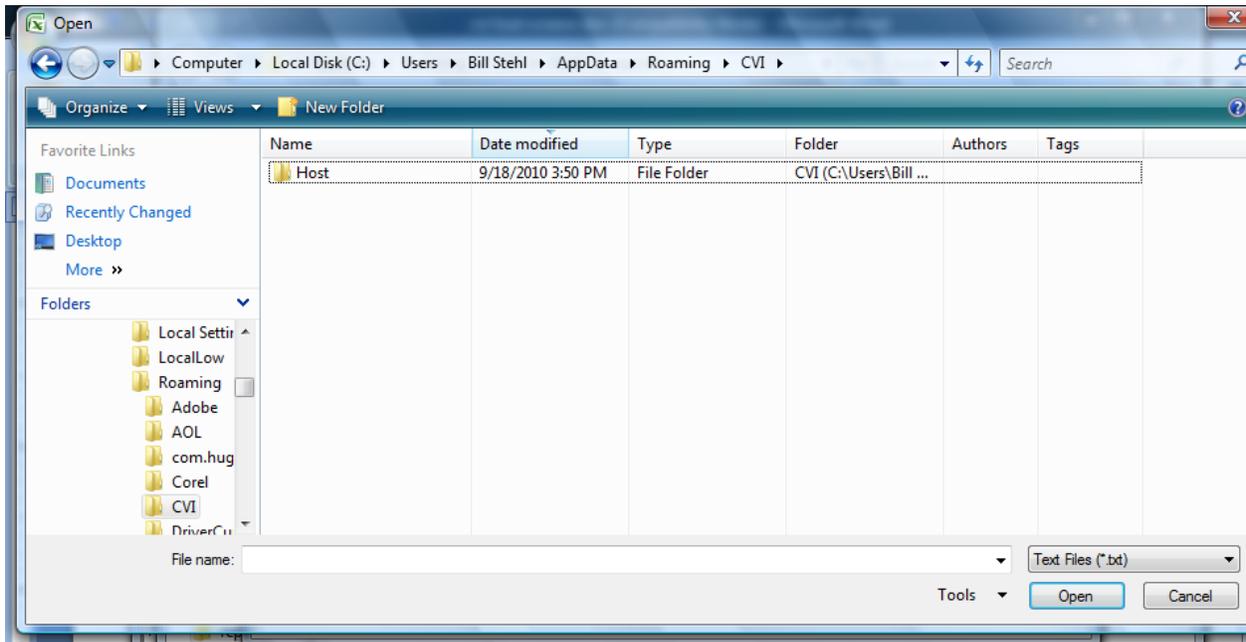
Once you have accessed the AppData file the following screen will appear. Click on and open the folder Roaming.



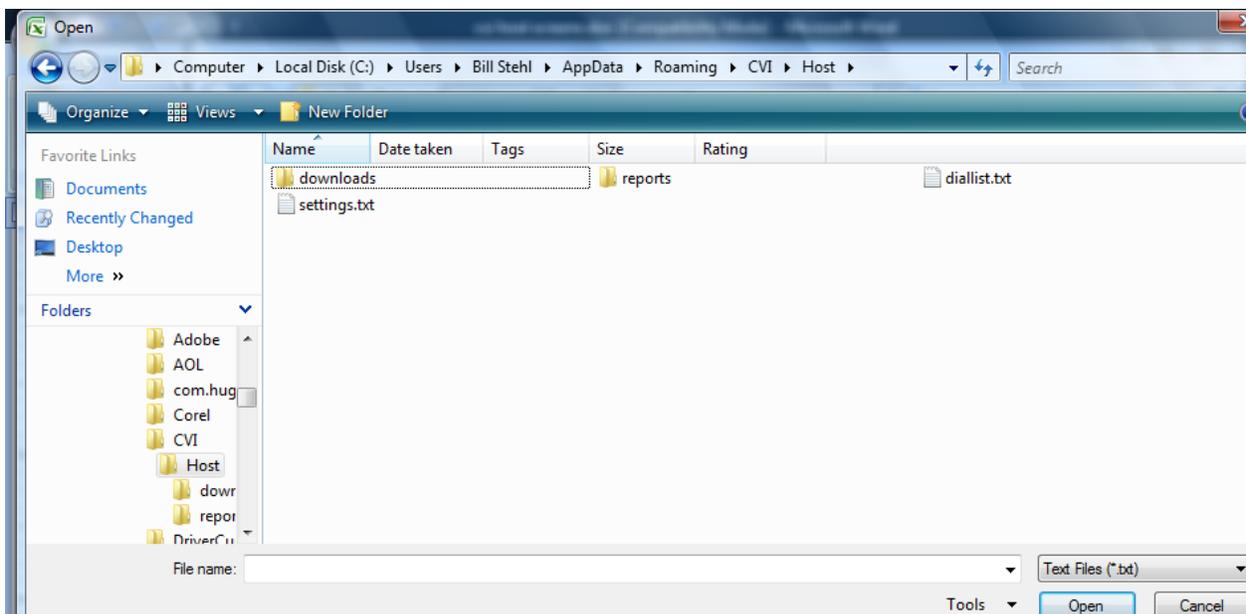
Click on and open the folder CM



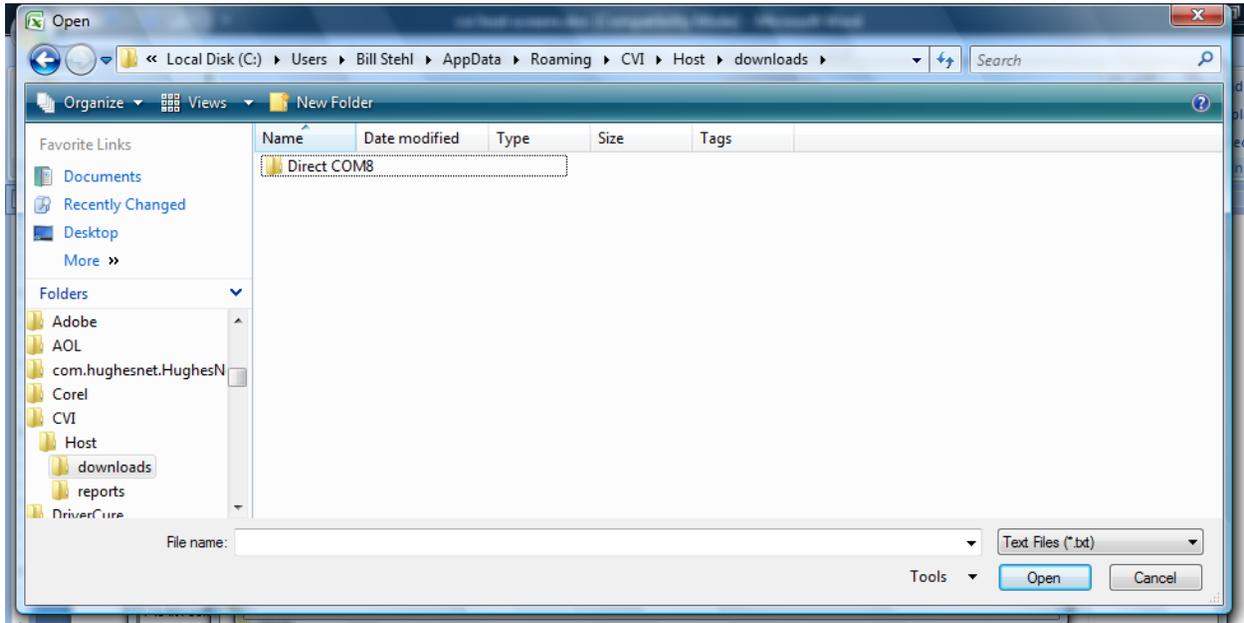
Click on and open the folder Host.



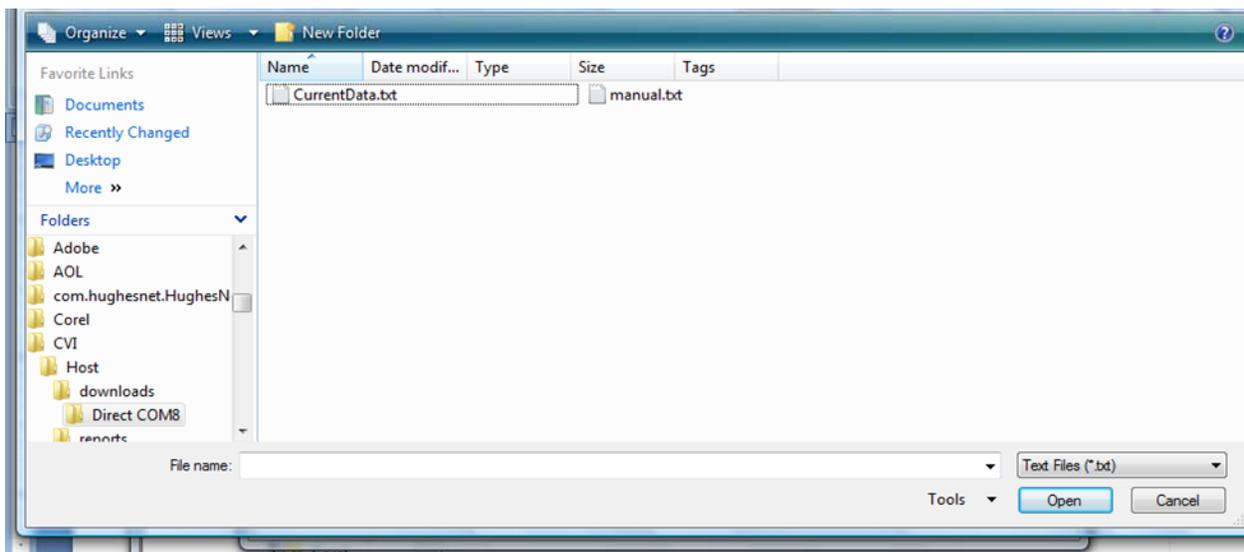
Click on and open the folder labeled Downloads



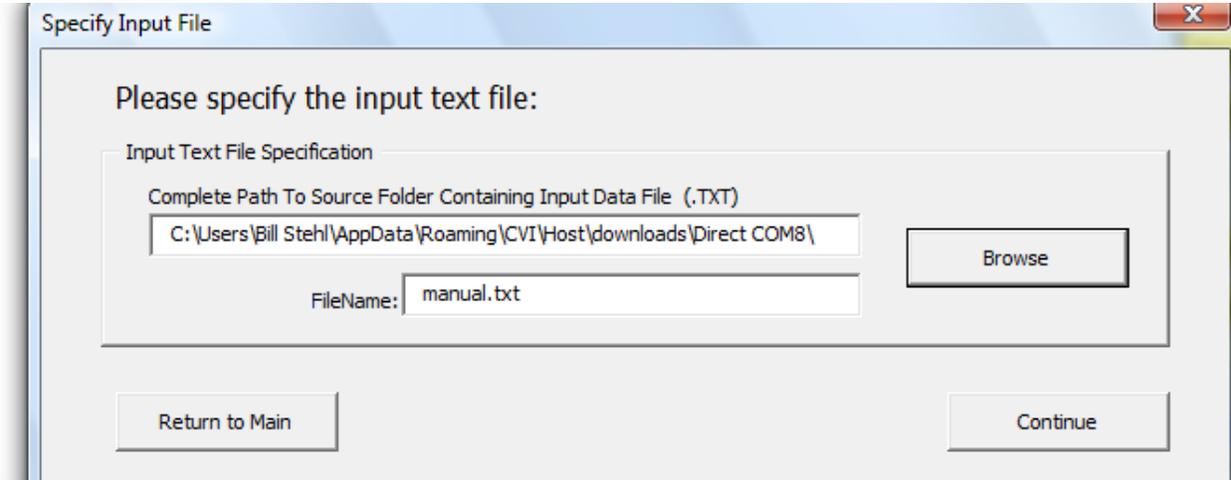
Click and open the folder corresponding to the communication port you are using.



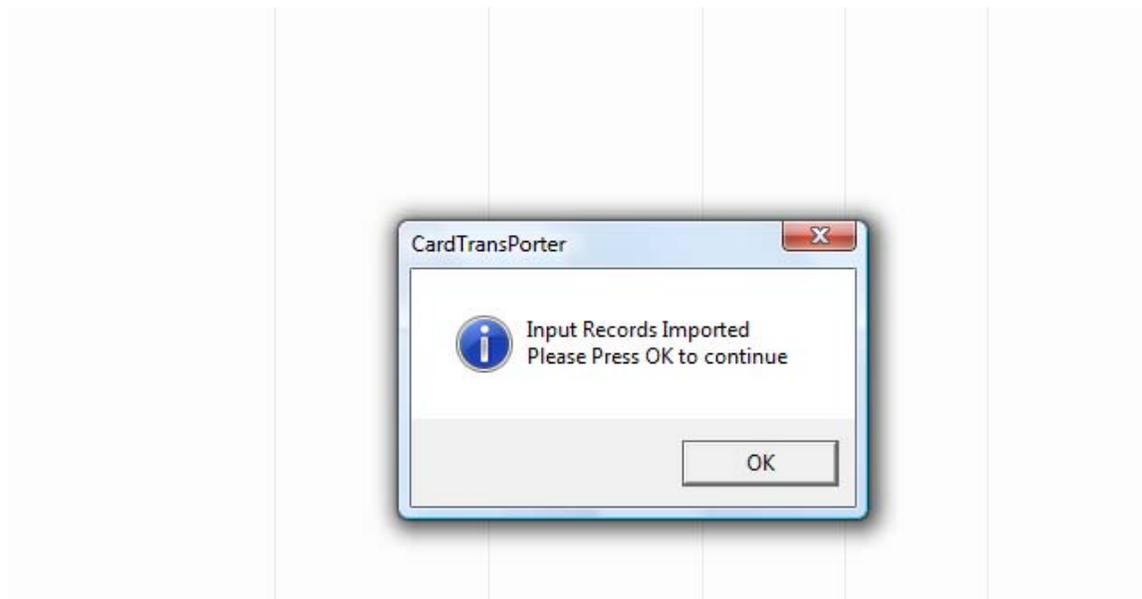
Click on the file manual.txt and then click on the Open key.



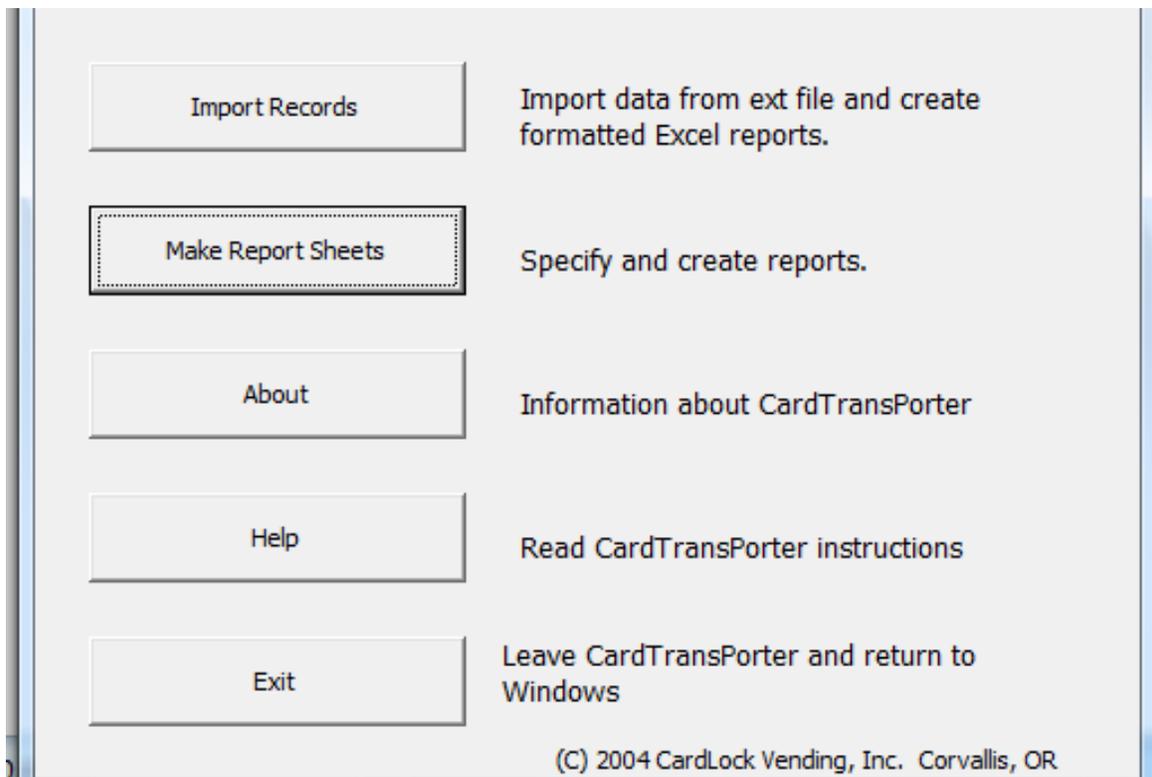
When you have created the correct path it will look like the one below except the name of the user will be different.
Click the Continue Key.



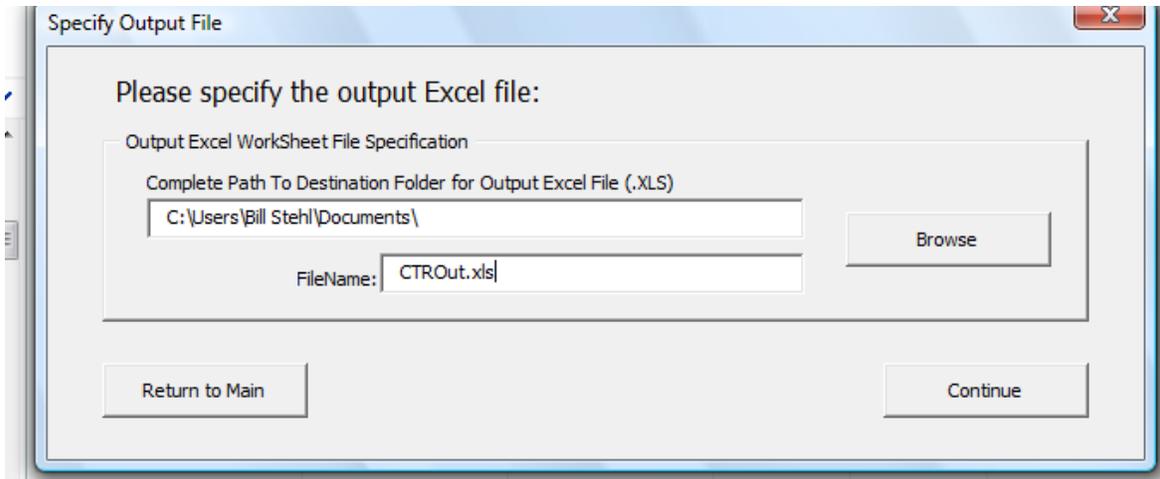
If you have created the file path correctly the following screen will appear when you input the records. Click OK



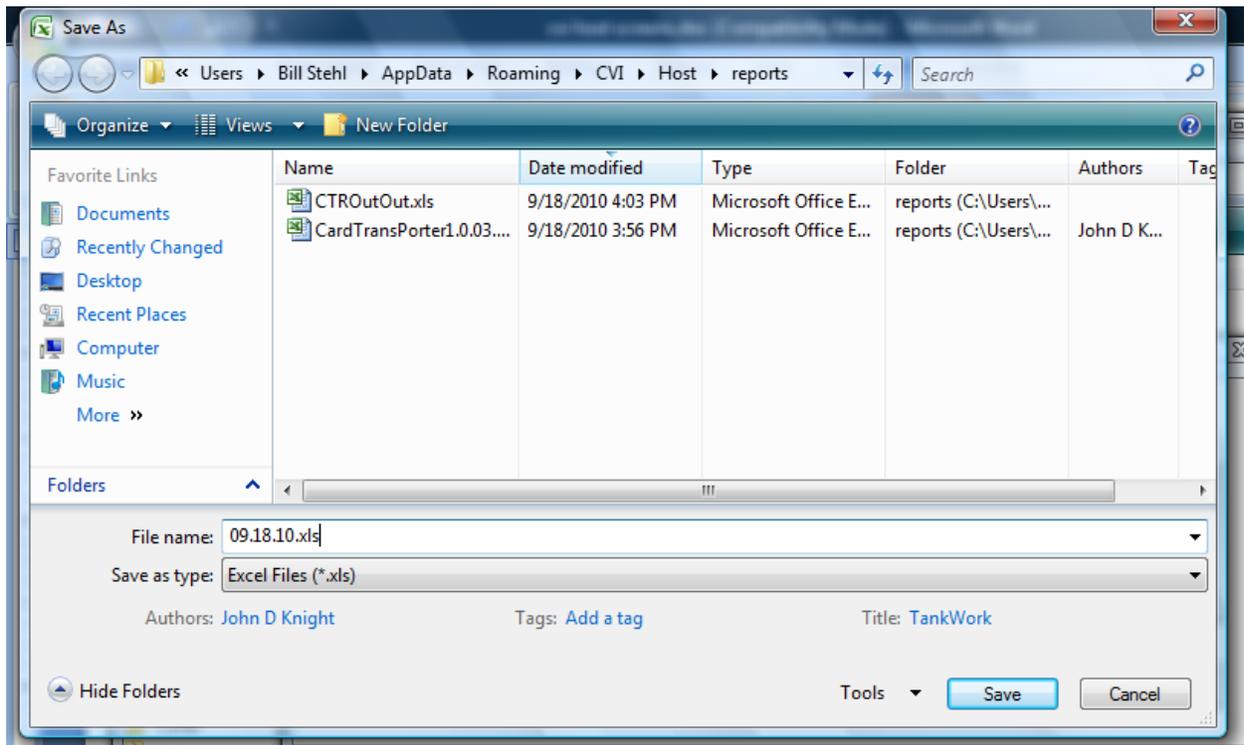
When you click OK you will be returned to the main menu screen. Click on the Make Report Sheets key.



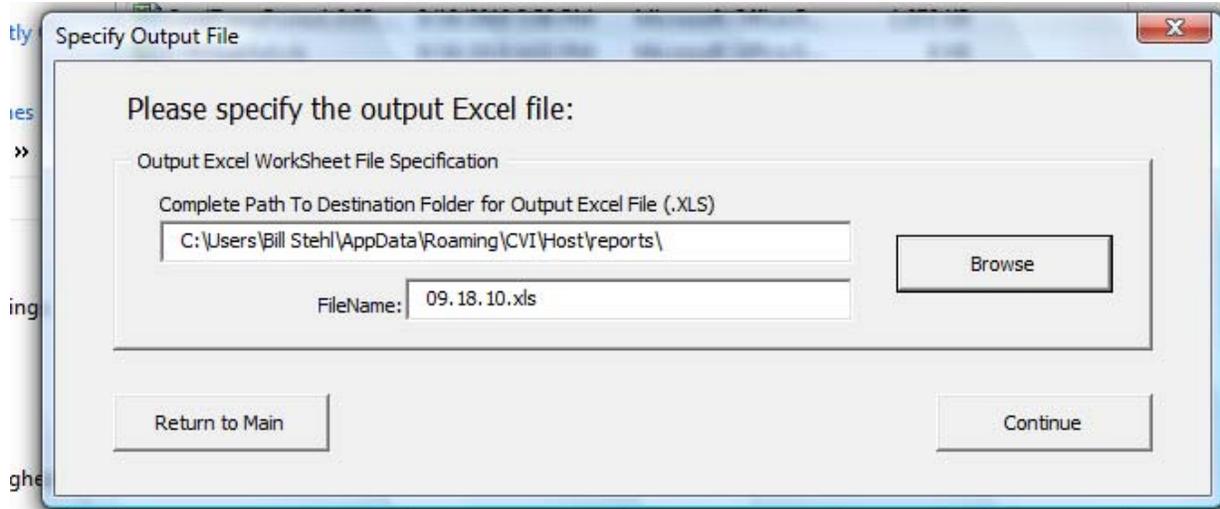
After you have clicked on the Make Reports key the following screen will appear. You must now choose where the finished excel report will be stored. Click on the Browse key



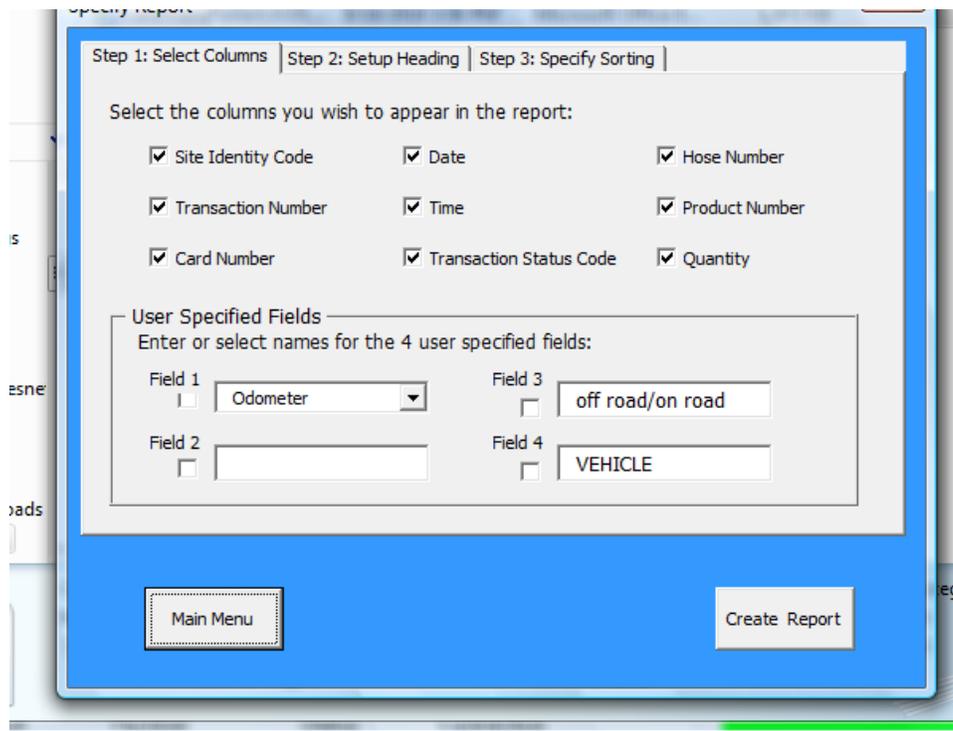
Once you click on Browse the screen below will appear. You can choose to store the finished report in the Reports Folder in CM Host or choose another path and place. No matter where you store the report change the File Name: to the date format shown and then click on Save.



Once you click on save in the previous screen the screen below will appear. Click on continue.



The following screen will appear. Choose the items you wish to appear on the report. The field specification is important to define. The fields appear in specific columns in the report, so be sure to name the User defined prompt in the proper field. Once you have selected what is to be in the report then click on the Setup Heading TAB.



REPORT HEADER

The heading will appear at the top of your report. You can have up to six lines appear on the top of the report. Once you have determined the heading then click on the Specify Sorting TAB.

Specify Report

Step 1: Select Columns | Step 2: Setup Heading | Step 3: Specify Sorting |

Enter lines of heading text which will appear at the top of the report:

Heading Line 1

Heading Line 2

Heading Line 3

Heading Line 4

Heading Line 5

Heading Line 6

Main Menu Create Report

SORTING

At the sorting screen you can choose how your report will be sorted. There are three levels of sort available. Deciding on the sort determines how your report will appear. If you wish to sort by card number as your primary sort the choose card number in level 1. If you want to sort by vehicle number as you primary sort then choose that as your level 1 sort. Then you can choose the have a sub total for each sort as well. Once you have determined the sorting for your report click on the Create Report KEY

Step 1: Select Columns | Step 2: Setup Heading | Step 3: Specify Sorting

Select columns to sort on. Checking "Subtotal" will produce a quantity subtotal each time the value in that column changes.

LEVEL 1

Sort On: Ascending Descending SubTotal

LEVEL 2

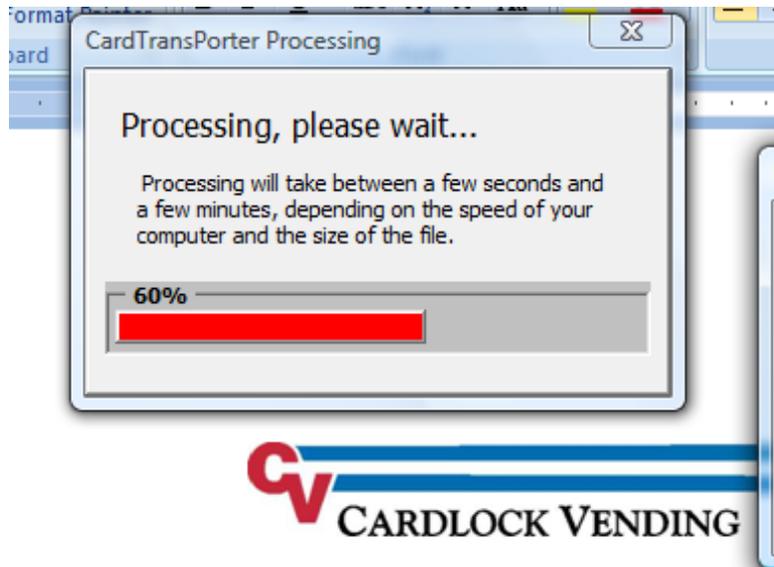
Sort On: Ascending Descending SubTotal

LEVEL 3

Sort On: Ascending Descending SubTotal

CREATING REPORT

After you have clicked on the Create Report key the following screen will appear showing the progress of the report creation process.



When the report has finished the following screen will appear. Click on the Exit TAB and the report will be ready for viewing or printing. The report is automatically saved in the folder you chose earlier.

Future reports will now have the paths stored for you. All that needs to be changed is the File Name on the output file which is normally the date.

