



User Guide

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Setting up T-Works for the First Time

System Requirements

Single User

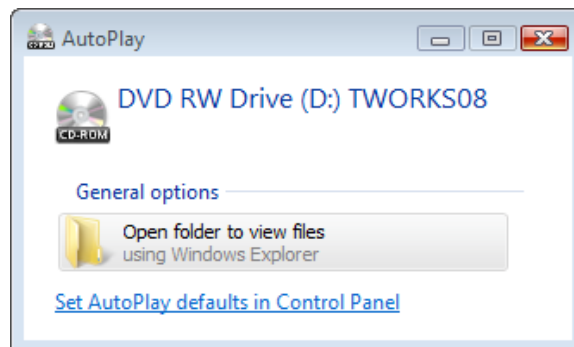
- Pentium III 500MHz or higher
- 256MB of RAM
- CD or DVD drive and hard disk drive
- SVGA (800 x 600) or higher resolution video adapter and display
- Windows XP (Service Pack 3), Windows Vista

Multi-User

- FileMaker Pro 10 (License for each user)
- Pentium III 500MHz or higher
- 256MB of RAM
- CD or DVD drive and hard disk drive
- SVGA (800 x 600) or higher resolution video adapter and display
- Windows XP (Service Pack 3), Windows Vista

Installing T-Works Manager Single User

1. Insert the T-Works Manager Installation CD into your CD-Rom Drive and choose "Open folder to view files", or download the latest version from the website:
<http://www.t-worksmanager.com>



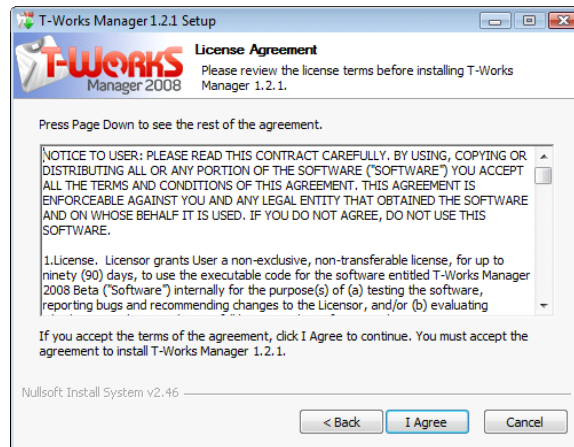
2. Double click the "Setup_T-Works_Manager_X.X.X.exe" (X.X.X represents the version number you are installing)



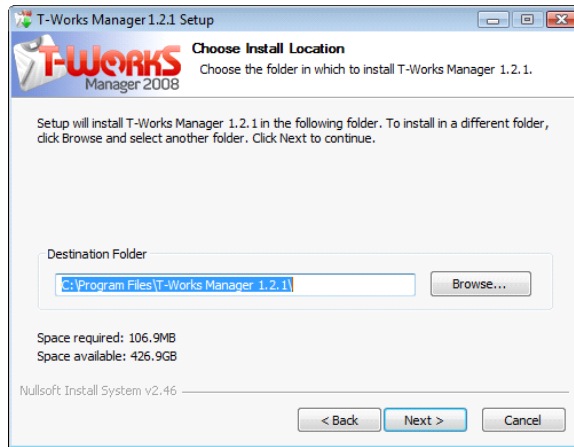
3. Click Next at the Setup Wizard to continue.



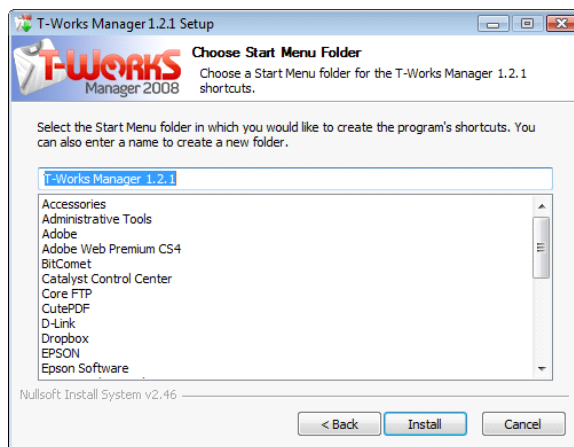
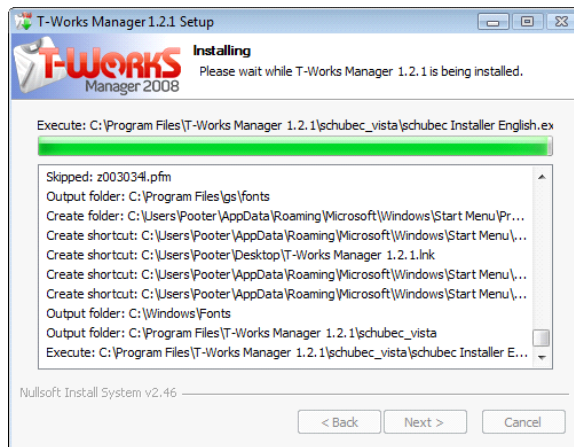
4. Review the License Agreement and click "I Agree" if you accept the terms of the agreement.



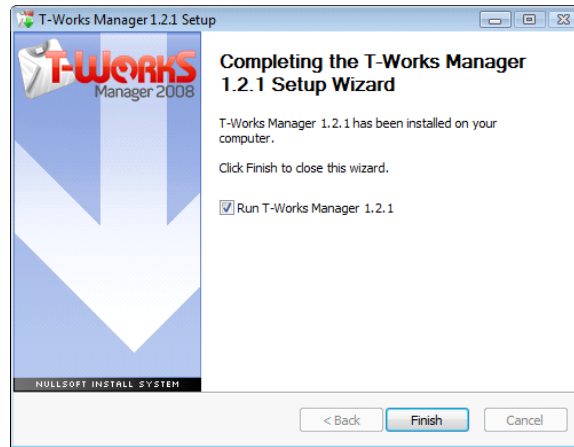
5. Click next to install T-Works Manager in the Program Files directory (or Program Files (X86) for 64-bit versions of Windows). If you want to install in a different location, click "Browse..." to choose a directory.



6. Click "Install" to begin installation with a default T-Works Manager start menu foldershortcut.



7. After installation is complete, click "Finish" to run T-Works Manager.



8. When running T-Works Manager for the first time, you'll be prompted to define a default username for logging in. Enter in "admin" The default password is: 1234

Installing T-Works Manager Multi-User

The Single and Multi-User versions have the same set of features with the exception of the Multi-User having the ability to share one database simultaneously with two or more machines. The Multi-User version is developed in Filemaker Pro 10 and is required to be installed on every machine that will access T-Works Manager.

Installation of a multi-user environment requires storing the database files on one machine (called the host machine, preferably a dedicated computer not running anything other than Filemaker Pro 10) with the client machines (the remaining workstations accessing T-Works over the network) requiring only a copy of Filemaker Pro with the following plug-ins, PDF drivers and interface font installed in the windows font folder.

Download the T-Works Manager multi-user files for (for host machine):

http://www.t-worksmanager.com/download/t-works_manager_1.2.0_multi-user.zip

Download the required Plug-ins (for each user):

http://www.t-worksmanager.com/download/t-works_plug-ins_windows.zip

Download the required Drivers (for each user):

http://www.t-worksmanager.com/download/PDF_Driver_Installers.exe

1. Install a copy of FileMaker Pro 10 on each computer for each user that will be using T-Works Manager, making sure all users are connected together over a local network.
2. Install the plug-ins & font for each machine. Place the plug-ins (.fmx files) inside the FileMaker extensions folder on each machine (located in your program files under C:/Program Files/FileMaker Pro 10/extensions). Then, install the font "TWSYM.ttf" into the Windows font

folder on each machine as well.

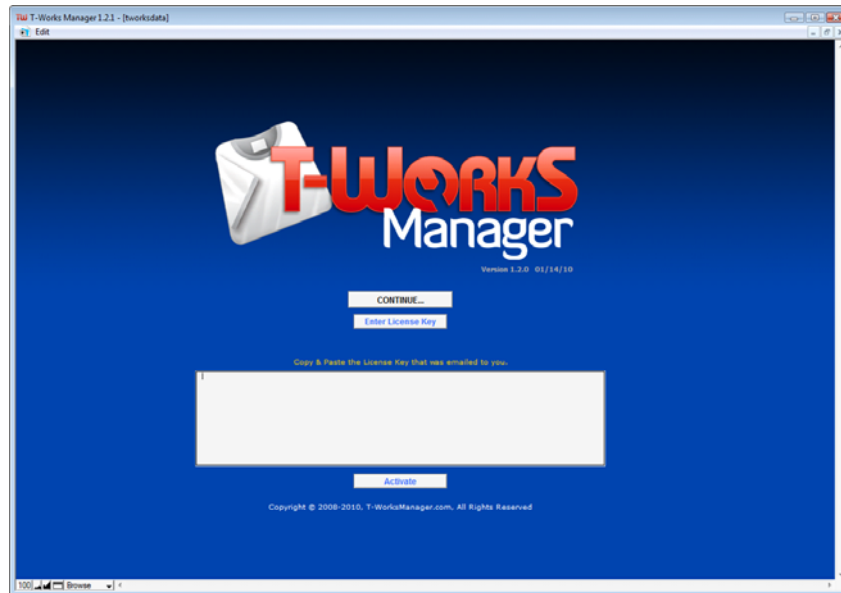
3. Install the PDF Drivers for each machine: the download is a self extracting archive, double click to extract the installers to somewhere on the machine. Once extracted, open and install both the PDF Printer Installer (XP or Vista) and Gpl_Ghostscript.
If you are having problems with the default set of PDF Drivers (also known as Schubec drivers) see the previous section on installing alternate drivers.
4. Save the T-Works files to the machine that will be hosting T-Works Manager.
5. Run FileMaker Pro 10, go to File menu under Sharing and select "FileMaker Network". Turn on File Sharing and write down the TCP/IP address of your computer that is displayed in the window.
6. Open the file: "tworksdata.fp7". T-Works will then prompt you to define your username, enter: username: admin (can be changed later in the Preferences screen).
7. T-Works will then prompt for a username & password, enter: username: admin (can be changed later in the Setting/Accounts screen) password: 1234 (can be changed later in the Settings/Accounts screen).
8. Click the "Enter License Code" button, then copy & paste the activation code that was emailed to you.
9. If you have a license for more than one user, T-Works will prompt you to close & re-open the file before other users can log-in.
10. For each client machine, Run FileMaker Pro 10.
11. In the File menu select "Open Remote...".
12. On the drop down menu that says "View" , select "Favorite Hosts" and the click "Add" to add a new favorite.
13. A new window will open allowing you to define your favorite hosts.
14. Enter the TCP/IP address that you wrote down into the "Host's Internet Address".
15. You can then optionally enter a nickname for that host as well, such as "T-Works Host".
16. Then below under file settings, select "Show Only these Files" and type in "tworksdata.fp7" into the box, then click "Save". You will return to the Open Remote window, then select your T-Works Host on in the list of Hosts and the file "tworksdata.fp7" should show up on the right in the list of available files.
17. If the tworksdata file is available, then select it and click "Open" and you're ready to go. Just

enter in the username and password provided by the administrator. If the file doesn't show up on the right then the firewall on the host machine is preventing access, try turning off the firewall on the host machine.

Activating T-Works

The T-Works Manager demo can be activated with a license key emailed to you after checkout. The license key is a long code that should be copied and pasted into the program. To activate:

1. Open the activation email, highlight the activation code, then copy.
2. Run T-Works Manager Single-User or Run Filemaker Pro 10 and open tworksdata.fp7
(Make sure the required plug-ins are installed in the Filemaker extensions folder before trying to activate the multi-user version or activation will not work).
3. On the opening splash screen click the "Enter License Key" button and paste the activation code into the activation window, then click the "Activate" button.



Defining Company Info

When running T-Works Manager for the first time, there are settings that need to be defined before attempting to create invoices or estimates. These settings include:

- Defining information about your company.
- Importing wholesale vendor pricing from your vendors.
- Defining print pricing for screen printing or embroidery services.
- Customizing color sets for inks and fabrics.

Company Info

Defining your company information in the Settings window will allow all printable forms to show your logo, address and phone number, as well as provide easy directions to your customers through Google maps in the customers screen. To define your Company info:

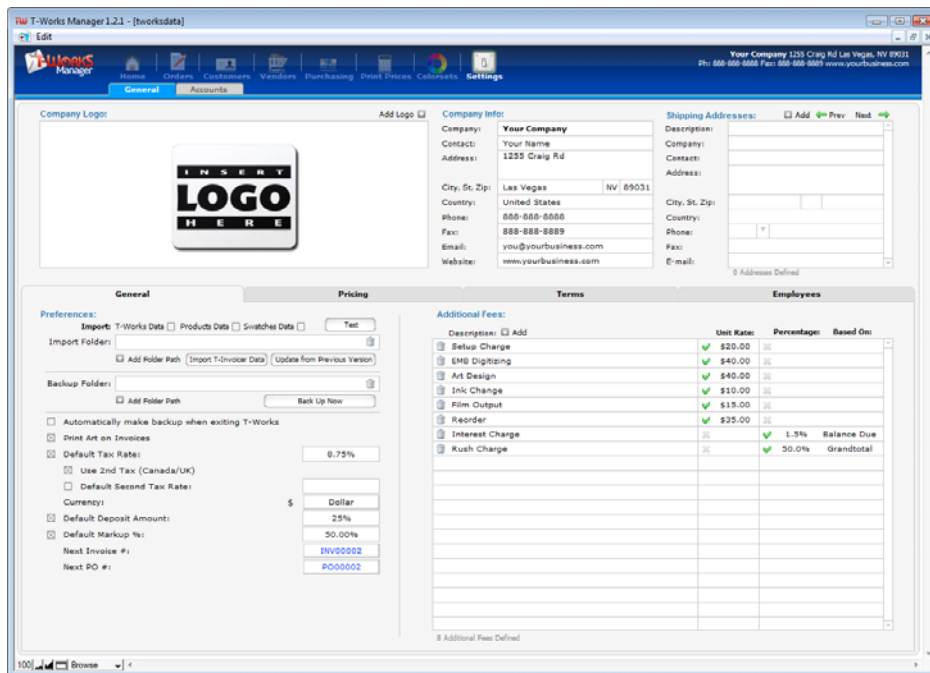
1. Go to the Settings screen by clicking the Settings button in the blue header.
2. Enter your company information in the fields for "Company Info:" located in the top center area of the window.

Company Info:

Company:	Your Company		
Contact:	Your Name		
Address:	1255 Craig Rd		
City, St, Zip:	Las Vegas	NV	89031
Country:	United States		
Phone:	888-888-8888		
Fax:	888-888-8889		
Email:	you@yourbusiness.com		
Website:	www.yourbusiness.com		

Adding a Logo

1. Go to the Settings screen by clicking the Settings button in the blue header.
2. Click the "Add Logo" button to select a graphic file from your computer. Compatible formats include .jpg, .png, .bmp, .wmf



Shipping Addresses

Entering in your company shipping address(es) in the Shipping Address fields allow you to display the shipping address, when ordering goods from a vendor or contractor, on a Purchase Order. It is possible to create multiple shipping addresses and choose them in a Purchase Order without having to type one in every time. To define shipping addresses for your business:

1. Go to the Settings screen by clicking the Settings button in the blue header.
2. Enter your first shipping address information in the fields for “Shipping Addresses:” located in the top right area of the window. Make sure to enter a description of that particular shipping address to easily differentiate the address from another when defining a Purchase Order.
3. To add additional shipping addresses, click the “+ Add” icon to create a new blank shipping address record, defining the address as described in step 2.

Settings Tabs

Below the Logo, Company Info and Shipping Address fields are four tabs with various settings that need to be defined. The tabs include:

- **General**
- **Pricing**
- **Terms**
- **Employees**

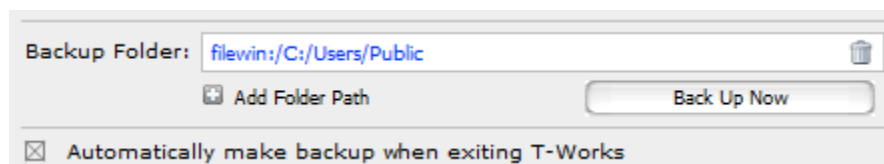
Settings > General Tab

General Preferences

At the top left of the General Preferences tab, there is a section for Importing from a previous version of T-Works or T-Invoicer. See the section for importing data from a previous version later in the chapter.

Backup

Just below the Import section there is an area to define a backup location to backup T-Works Manager. It is recommended to regularly backup T-Works in the event of power outages, data loss or data corruption. To define a backup directory:



The screenshot shows a dialog box for setting backup preferences. It features a text input field for the 'Backup Folder' containing the path 'filewin:/C:/Users/Public'. Below the input field is an 'Add Folder Path' button with a plus icon. To the right is a 'Back Up Now' button. At the bottom, there is a checked checkbox labeled 'Automatically make backup when exiting T-Works'.

1. Click the “Add Folder Path” button to bring up a dialog box where you can define a directory on your computer or network. After selecting a directory, the path will be displayed in the backup directory field.
2. Click “Back Up Now” to backup the database to the defined directory
3. If you want T-Works to automatically back up to this folder when exiting the program, check the “Automatically make backup when exiting T-Works” preference.

Print Art on Invoices

You can optionally show or not show the artwork placements (below and left of the line items) on the printable invoice form by checking or unchecking this preference.

Default Tax Rate

To automatically fill in the tax rate when creating a new order, check the box left of the “Default Tax Rate” and enter a rate in the **Default Tax Rate** field.

To automatically enter in a second tax rate when creating a new order, check the **Use 2nd Tax Rate** preference and enter in a rate in the field.

Currency

Define the currency symbol for your country by choosing a from the list of currencies in the **Currency** field drop down menu.

Default Deposit

To automatically enter in a deposit percentage that will display on an order and calculate and show your customer the deposit amount required to begin the order on the printable invoice or estimate form, check the **Default Deposit** box and enter a percentage value in the **Default Deposit** value field.

Default Markup

To automatically enter in a markup percentage for wholesale goods when creating a new invoice or estimate line item, check the **Default Markup Percentage** box and enter a percentage value in the **Default Markup Percentage** value field.

Next Invoice Number

To change the next invoice number when a new order record is created, click on the **Next Invoice Number** field and enter the value in the dialog box that pops up. Whatever number you define, T-Works will continue counting sequentially for each new order record created afterwards. To avoid duplicate invoice numbers, do not set the next invoice number below the highest number of any existing invoice record.

Next Customer Number

To change the next customer number when a new customer record is created, click on the **Next Customer Number** field and enter the value in the dialog box that pops up. Whatever number you define, T-Works will continue counting sequentially for each new customer record created afterwards. To avoid duplicate customer numbers, do not set the next customer number below the highest number of any existing customer record.

Additional Fees

The Additional Fees section of the Settings window is an area where you can define typical fees that you may charge a customer on an invoice or estimate. Examples would be:

- Setup Charges
- Art Charge
- Color Separation Charge
- Embroidery Digitizing Charge
- Rush Charge
- Ink Change Charge

After defining your additional fees, you can then add any of the fees to an invoice (in the additional fees section of the order window) without having to type in description, rate or percentage every time. To define an additional fee:

1. Click the "+Add" button below "Additional Fees" in the Settings window, in the General tab.
2. Enter a description of the fee in the **Description** field by choosing from the drop down list of default fees, or clicking in the field and entering a different description.
3. If the fee is based on a unit rate, enter the unit rate of the fee in the **Unit Rate** field making sure there is a green checkmark to the left of the value (otherwise click the gray "X" to toggle to a checkmark).
4. If the fee is based on a percentage, enter a percentage in the **Percentage** field making sure there is a green checkmark to the left of the value. Next, define what criteria the fee will be based on by choosing from the list in the **Based On** field. Choose either Subtotal, Grand Total or Balance Due.

Settings > Pricing Tab

Embroidery Stitch Count Ranges

When creating a price list record for embroidery in the Print Prices screen, you can modify the stitch count price break columns that T-Works will use when calculating pricing for an order. The first row represents the column number, the second row of numbers indicate the minimum and maximum stitch

counts for that particular pricing column.

Embroidery Pricing Stitch Count Ranges:

1	2	3	4	5	6	7	8	9	10	11	12												
1	5000	5001	5999	6000	6999	7000	7999	8000	8999	9000	9999	10000	10999	11000	11999	12000	13999	14000	15999	16000	17999	18000	20000

The Embroidery Stitch Count Ranges preference in the Settings Screen.

Price Matrix		EMBROIDERY Stitch Count Ranges													Round to nearest .10: <input type="checkbox"/>	
Qty	Range	Up to 5000K	5001 to 5999	6000 to 6999	7000 to 7999	8000 to 8999	9000 to 9999	10000 to 10999	11000 to 11999	12000 to 13999	14000 to 15999	16000 to 17999	18000 to 20000	+ Incrm	% Incrm	
1	11	5.57	5.90	6.26	6.63	7.03	7.45	7.90	8.38	8.88	9.41	9.98	10.57	+	6%	
12	23	4.29	4.59	4.91	5.26	5.62	6.02	6.44	6.89	7.37	7.89	8.44	9.03	+	7%	
24	47	3.07	3.35	3.65	3.98	4.33	4.72	5.15	5.61	6.12	6.67	7.27	7.92	+	9%	
48	71	2.64	2.89	3.17	3.47	3.80	4.16	4.55	4.98	5.46	5.97	6.54	7.16	+	9.5%	
72	95	2.43	2.67	2.94	3.23	3.56	3.91	4.30	4.74	5.21	5.73	6.30	6.93	+	10%	
96	287	2.29	2.53	2.80	3.09	3.41	3.77	4.17	4.61	5.09	5.62	6.22	6.87	+	10.5%	
288	499	2.07	2.30	2.55	2.83	3.14	3.49	3.87	4.30	4.77	5.30	5.88	6.52	+	11%	
500	999	2.00	2.22	2.46	2.74	3.04	3.37	3.74	4.15	4.61	5.12	5.68	6.30	+	11%	
1000	10000	1.93	2.14	2.38	2.64	2.93	3.25	3.61	4.01	4.45	4.94	5.48	6.08	+	11%	

An example embroidery price matrix in the Print Prices database.

Settings > Terms Tab

You can modify the example terms that come with T-Works Manager that display on the invoice, estimate, artwork and layout approval sheets, by modifying the Invoice Terms and Art Approval Terms fields. Note

Settings > Employees Tab

In the Employees tab of the setting screen, you can define and save information about your employees. The benefits include: assigning tasks to different employees on a tech sheet (showing what action was taken and time completed) and Storing emergency contact information for your employees. To define employees:

1. If there are no employee records created, Click on the **Last** name field and enter the employees last name to begin defining your first employee record.
2. Enter in the remaining employee information in the **First name, Home Address, Home Ph, Mobile Ph, Email, Dept, Position, Emergency Contact Name, Relation** and **Phone** fields.
3. To add another employee record, begin by entering the information in the blank line below the last employee record.

Settings > Accounts Tab

The Accounts tab of the setting screen is where you can create accounts and define privileges for all users logging into T-Works Manager. There are three levels of privileges:

- Manager (full access)
- Sales (order and customer database access only)
- Production (artwork, layout and tech sheet only access)

If you're a one man business or have no need for accounts and privileges, then check the "Allow Guest Account" checkbox to automatically log-in without a username/password.

To Create a New Account:

1. Go to the Accounts tab in the Settings screen (must be logged in as administrator).
2. Click the "New" button at the top left of the screen.
3. Enter an account name in the **Account** field.
4. Enter a password in the **Password** field. You can optionally click the Random Password button to generate a random password for you.
5. Select a Privilege from the **Privilege Set** field drop down list.
6. Click the Submit New Account button to finalize and submit the new account.

To Modify an existing account password, enter the new password into the **Password** field, then click the Reset Password button.

Defining Print or Embroidery Pricing

The Print Prices database is an area where you can define price matrices for how much you charge customers for screen printing or embroidery services separate from the cost of the garment. These price lists will be used for calculating pricing for invoices and estimates. You can create as many price lists (matrixes) as you need. By Default, T-Works comes pre-installed with sample Price Lists to use as reference for creating your own, or to modify. To create a new Price List:

1. Go to the Print Prices screen by clicking the Print Prices button in the blue header at the top of the screen.
2. Click the "+ New" button (top left of screen) to create a new Price List record.
3. Enter a description of the price list in the **Price List Name** field.
4. Click on the **service** field to select a price list type from the list of service types in the drop down menu, choosing either Screen Printing or Embroidery. When choosing Screen Printing, the column headings will display as number of ink colors/screens (1 color to 12 color). When choosing Embroidery, the column headings will show as thread count ranges (which can be modified in the Settings screen under the Pricing Tab).

5. Click the “+” icon button in the price matrix area to create a new price break. A price break is a set of prices (for each color or stitch count) for a given quantity range of garments. Enter the minimum quantity in the left side of the **Qty Range** field and the maximum quantity on the right.
6. Enter the price for each ink color or stitch count to be printed or embroidered in the 12 color/stiches fields. You can quickly create pricing across all colors/stiches for a given price break using the tools at the right of each price break line incrementing the price for each color by a dollar value or percentage. To do so, start by entering in the amount you would charge for a one color print (or mimum stitch count) in the first field. Then, determine how you would like to imcrement each color, either by a dollar value or percentage. If by a dollar value, enter the amount in the **+Incrm** field, then click the blue “+” icon button (You can optionally check “Round to the nearest .10” to round each price to the nearest multiple of \$.10 when calculating pricing). The price for columns 2 through 12 will be automatically populated with pricing incremented by the value you defined. If by percentage, enter the amount in the **%Incrm** field then click the blue “X” icon button. The price for columns 2 through 12 will be automatically populated with pricing incremented by the value you defined.
7. Continue adding price breaks for as many price breaks as you need.

Adding Vendor Pricing

You should add vendor pricing to T-Works before starting to create Invoices or Estimates. By default, T-Works comes pre-installed with Broder Bros wholesale pricing. You can import other vendor pricing by downloading them from the T-Works Manager website or you can create you own to import.

See the companion [custom_vendor_data_guide.pdf](http://www.t-worksmanager.com) at <http://www.t-worksmanager.com> for detailed instructions on customizing and importing vendor data.

Navigating T-Works Manager

When you're working with T-Works Manager for the first time, there are some fundamentals to be learned that are required to navigate through the software and finding what you're looking for.

The program is divided up into 8 sections:

- **Home**
- **Orders**
- **Customers**
- **Vendors**
- **Purchasing**
- **Print Prices**
- **Colorsets**
- **Settings**

Each section has an independent database of records (with the exception of Home and Orders which share the same database). When you click the icon of each respective section (in the blue header at the top of the screen) the screen will jump to the layout and show the records contained in that database. You can click the right or left arrows on either side of the screen (see Figure 1 below) to navigate through and view each record.

Found Sets of Records

The most important concept to understand is the found count. When you look at the found count in Figure 1 (in the blue header in between the left & right arrows) it shows "Record 1 of 1". The first number indicates what record you are viewing, the second number shows how many total records are being **viewed**. **The second number only shows how many are being viewed and does not indicate how many total records there are in that database.** If you want to view all the records in that database, then click the "Show All" button to view the entire set.

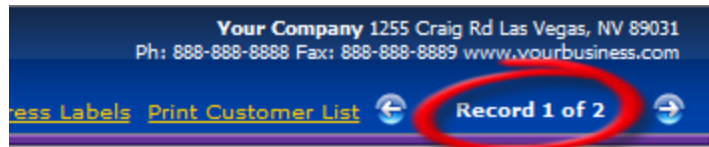
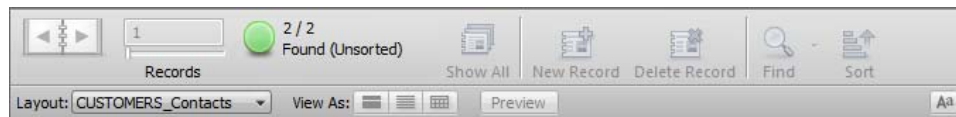
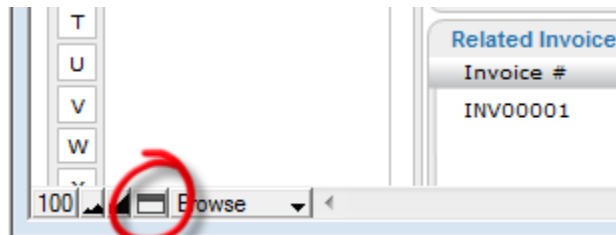


Figure 1

Status & Layout Toolbar

To show more detailed information about a found set of records when navigating or finding records, open the Status & Layout toolbar by clicking on the status bar icon in the bottom left corner of the screen.



Tabs

Within each section in T-Works Manager there are tabs (or subsections) to show different functions pertaining to that particular database. For example in the Orders screen, there are tabs for "Form", "Artwork", "Layout", and "Tech Sheet".



When you click on a tab within any section, the screen will jump to show you the respective function, and will show you data for the same record. Clicking on a tab will not go to a different record. For example, when you're looking at an invoice record in the "Orders" screen under "Form" and you click on the "Artwork" tab, you'll be looking at the Artwork data for that invoice, if you then click on the Layout tab, you'll be looking at the layout for the invoice, and so on.

Editing fields

Editing fields in T-Works Manager is as simple as entering the field (either by clicking on the field or by tabbing into the field) and entering data (or editing the data) for that field. However, there is more to understand when it comes to fields:

1. Some fields only make calculations (like the subtotal field) and are uneditable. You'll know a field is uneditable when you attempt to edit a field and the following message pops up: "This action cannot be preformed because this field is not modifiable"
2. When entering a field with a drop down menu, it not always necessary to select from the menu, you can click on the field again to bring up the cursor to enter/edit data (this works well on a line item description). However, some fields with drop downs should not contain data other than what's in the list, so modify at your own risk. (You can be sure entering data other than from the list is ok when there is "Edit.." at the bottom of the drop down list).
3. If a field is a percentage (like the **tax rate** field), when entering/editing the value, the percentage should be entered as a tenth or hundredth of whole number. For example 10% should be entered in as .10

Finding Records

1. Go to the layout of the database you want to search in, like the "Orders" screen. The correct layout will contain the field or fields to search on. For example, to find all customers in the city of "Denver," make sure the layout has the city field.
2. Change to Find mode. T-Works Manager has three ways to select modes, from the Find Button in the top left of the screen, from the pop-up menu on the lower left of the screen or by keyboard command (Control + F on the PC or Command + F on the Mac). T-Works Manager will then display a blank layout on the screen.
3. Place the cursor (click) in a field that contains the criteria on which the search will be performed. For example, to find a customer named "Smith", enter the main contact field and/or the contacts name field and type "Smith."
4. Use multiple find requests for more advanced searches. Enter the criteria for the first find. Go to "Requests" and select "Add New Request." A new, blank layout screen will appear. Enter the additional request criteria in the appropriate field of the second find layout. For example, to find records for the last names "Smith" and "Jones," enter Smith in the name field of the first find request and Jones in the name field of the second find request. The result will yield records in

which Smith or Jones appears in the name field.

5. Enter special symbols in find fields when needed. A list of these symbols appears on the Find mode status area. Popular symbols include a symbol to search a range, such as a range of date or values; a symbol for "less than" and "more than;" and a symbol for exact match, which helps to find empty fields.

< Less Than Finds all the records that are less than what you specified.
≤ Less Than Or Equal Finds all the records that are less or equal to a value that you specified.
> Greater Than Finds all the records that are greater than what you specified.
≥ Greater Than Or Equal Finds all the records that are greater than or equal to a value that you specified.
= Exact Match Searches for each full word match for each word specified. Without the operator, a search for Bob would return records of Bob Jones, Bob Williams and Billy Bobbett. If you did a search using the exact operator (= Bob) then your search would return Bob Jones and Bob Williams. Billy Bobbett would not be found when using the exact match search operator.
... Range This is used to find the matching records between two values in a particular field. This is most useful when dealing with numbers, date and time fields. If you were to go into Find Mode and type 10...20 as your find setting and execute the find, you would find the records with values between 10 and 20 (including 10 and 20). For example, you might get records with values of 11, 15 and 20.
! Duplicates This is used to find records that have exactly matching data within the search field. The found set will have all the duplicates (original and following matches). A common use is to find duplicate contact records in the customer database. This can happen via data entry errors. You want to make sure you don't do a find for duplicates and delete the found set. That would delete the original records as well.

// Today's Date

This is a quick and easy way to find records that have a date value that exactly matches today's date.

? Invalid Date or Time

By default, T-Works Manager does not allow a user to enter in invalid data into a date or time field and will let you know if you try. However, you can enter invalid information into a date or time field while importing. So, invalid data is possible in these fields. This invalid data can cause a variety of problems with your database solution. You can use the ? operator to find any invalid data you might have and work to correct the problem records.

@ One Character

This is used to put a wildcard character into one character space that makes up part of a search setting. For example, a search for Mo@ could return Mom, Moe or Mod. This means any character could take the place of the @ character. However, only one character is all that can be replaced. Records with moon, move or moot would not be found because of the one wild character limitation.

*** Zero Or More Character**

This is one of your more "taking a shot in the dark" type of search operators. This will find matches for the wildcard of zero or more characters. A search for Mo* would return matches such as Mo, Moe, Modern and Moon.

"" Literal Text

The Literal Text Match is a search operator used when you are searching for a literal string of text pieces. Say we have a name field and it contains the following data on four different records ...

- T-Works Manager
- T-Works Manager, Inc.
- Manager T-Works
- Inc. Manager T-Works

A standard search for T-Works would find all four records. A literal search for "T-Works Manager" would find the records of ...

- T-Works Manager
- T-Works Manager, Inc.

~ The Relaxed Search

A Japanese only feature.

== Field Content Match

This is used for finding exact matches to what you typed in your search settings. The match will only find the exact same words (no more or less) in the exact order you entered them.

Put a check in the Omit box when needed. The Omit box will omit from the found set all records that have the criteria in that field. For example, to find records for all states except Mississippi, enter Mississippi in the state field and click the Omit box.

6. Once ready to perform the "Find.", hit "Enter" on the keyboard. T-Works Manager brings up the records that match the request. This is the found set. The number of records found will be listed on the top right.

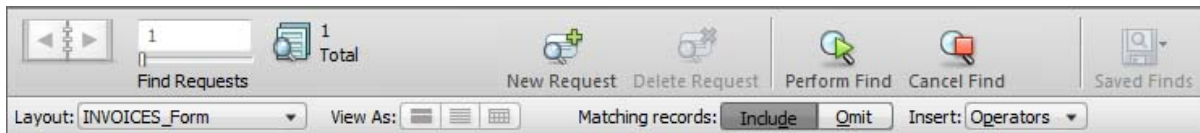
Omitting Records

You can omit records from a found set or while performing a find. In other words, you can find information in your database that "does not equal" your specified criteria. For example, you can find all invoices except those created in the past 30 days.

To omit a record from a found set, type Control + R while viewing the record (or while selected in a list view) to "hide" the record.

To find records that don't match criteria:

1. In Find mode, type criteria for the records to omit.
2. For example, to find all invoices except those in the city of London, type London in the City field.
3. Click Omit in the layout bar.



4. Click Perform Find in the status toolbar.

To find some records while omitting others:

1. In Find mode, type the criteria for the records to find.
2. For example, to find vendors in the state of New York, except those in the city of Albany, start by

typing New York in the State field.

3. Click New Request in the status toolbar.
4. Type criteria for the records to exclude, and click Omit.
5. To exclude Albany, you would type Albany in the City field and click Omit.
6. Click Perform Find.

Tips

You can have omit criteria in more than one request. T-Works Manager works through the requests in the order you create them. For example, in the Customers database with clients in the US and Canada:

If the first request finds all clients in Ontario and the second request omits all clients in the US, the found set contains all clients in Ontario, Canada but none in Ontario, California or anywhere else in the US.

If the order of the requests is reversed (the first request omits all clients in the US and the second request finds all clients in Ontario), the found set includes all clients in Ontario, Canada and in Ontario, California, but no records for clients elsewhere in the US.

Saving Records

T-Works Manager will automatically save a record when:

- After editing a field and hitting the Enter key (on the number pad, **not the return key**)
- After editing a field, then clicking to another field
- After editing a field and tabbing to another field
- Going to another record
- Going to another layout

Formatting Fields

In T-Works Manager, any field that is editable can be can also be formatted. Formatting options include:

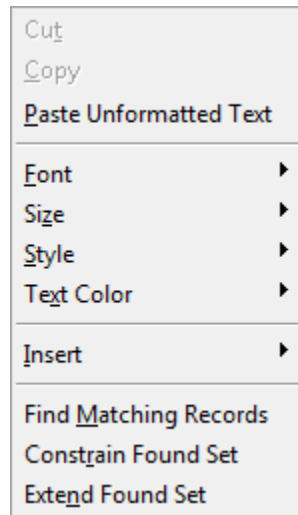
- Style (bold, italic, etc.)
- Font
- Text size
- Color
- Line Spacing

- Text Alignment

Note: Applying formatting to a field will not change formatting on printable forms as well.

To format text in a field:

1. Highlight the text to be formatted and right click, or go to the format menu.
2. A contextual menu will pop up with submenus for formatting.



3. Choose the formatting you want to apply to the field.

Using T-Works Manager

Adding Customers

When you're ready to create a new invoice or estimate for a customer, you need to create a new record in the customer database. First, go to the customers screen and click the "New" button to create a new customer record. A new blank record will be created with a sequential and unique customer number. Follow these steps to fill out the customer record:

1. Start by adding the company name in the company field.
2. Add a main contact by first adding the contact in the list of Contacts (the center section of the screen). Click the "+" icon to create a new contact for this customer and fill out the name, title, phone, email, etc.
3. Once the contact has been entered, you can select the main contact from a drop down menu by clicking in the main contact field & selecting that contact.

4. Fill out the rest of the customer information including city, state, zip, phones, fax email, website url, etc.
5. You can then add a shipping address to choose when making an invoice or estimate for that customer. You can define multiple shipping addresses for the same customer and give them a description to differentiate them.
6. To add a new shipping address, start by filling out the shipping address fields if they are blank. Start with entering a description of the shipping address, like "Owners Home" if the address is the owners home.
7. If the shipping address has been filled out and you want to add another shipping address, click the "+Add" button to create a new blank shipping address.

Defining a New Invoice or Estimate

When you're ready to create a new invoice or estimate, start by adding the customer information in as a new record in the customer database if you haven't created a record for that customer already.

1. Navigate to the Orders screen by clicking on the "Orders" button in the blue header. The screen will jump to show the database of order records (invoices and estimates).
2. Click the "New" button to create a new blank order record with a unique, sequential invoice number.
3. Fill out the **Job Name** field using a description of the job for easy reference.
4. Define the status of the order by clicking on the **Status** field, and choosing a status from the drop down menu, either Invoice or Estimate.
5. Define the order type by clicking on the **Order Type** field, and choosing from the drop down menu or click again to enter in a different value. Default choices include: New, Re-Print, New w/ Strike Off, New w/ Press Check, Re-Print w/ Changes and Prospective.
6. Define what of type service will be used for the order by clicking on the **Service** field and choosing from the drop down menu or clicking again to enter a different value. Default choices in the drop down include Screen Print, Embroidery, Promotional, Digital.
7. Define the order class by clicking on the **Class** field, and choosing from the drop down menu, Default values include: Custom (for in-house production) or Contract (for goods printed/sub-contracted with a contract printer).
8. **Order Date** is automatically generated with the current date when you first create the record, but can be modified.

9. Enter the due date by clicking on the **Due Date** field and selecting a date from the drop down calendar.
10. Define the **Bill To** for this order by clicking in the **Company** field and selecting a customer from the list of customers in the customer database. The contact name and address will be automatically entered in the **Contact, Address, City, State** and **Zip** fields.
11. Define the Ship To by clicking on the **Ship To** tab, clicking on the **Location** field and selecting a shipping address from the list of shipping addresses for that customer.
12. Add a purchase order number, if provided by your customer, in the **PO#** field.
13. Define the sales rep who is responsible for the order by clicking in the **Rep** field and choosing from the list of sales reps. To Add a sales reps to the list, click "Edit..." at the bottom of the drop down list.
14. Define the terms of the order by clicking on the **Terms** field and choosing from the drop down menu or clicking again to enter a different value. Default values include: COD (Cash on Delivery), Prepaid, Net 7, Net 14, Net 30.
15. Define the preferred shipping method by clicking in the **Ship** field and choosing from the drop down menu. Default values include: UPS, USPS, FedEx, DHL, Delivery, Will Call.

Tip: You can customize any list of values in the drop down menus that have "Edit..." at the bottom of the drop down list.

Defining Placements for an Order

When creating a new order it is required to enter in placement information for the order. A placement is any one area on a garment/item that will be printed or embellished, like a left chest, full back or sleeve print. It is important to enter in placement information because T-Works will base it's pricing on how many placements (including colors and/or stitches) will be used for the order.

1. To add your first placement, start by clicking just under where it says **Location** in the white area to define where the placement location is to pull up a drop down list of placement locations such as LCH (for left chest), RCH (for right chest), etc.
2. Click on the **Service** (to the right of **Location**) field to select what type of service will be used for that placement from the drop down list, such as Screen Printing, Embroidery etc.
3. If the placement is Screen Printed, enter the amount of screens (or colors) in the **Colors** field that will be printed.
4. If the placement is Embroidered, enter the stitch count in the **Stitch** field.

5. Continue creating up to four placements for the order by repeating step one but instead starting on the line below the last placement you defined.

Defining Artwork for an Order




After you've defined the placements for the order, you can add more detailed information about the artwork for each placement by adding thumbnails of the artwork to be used for better locating & referencing of the order, as well as creating art and layout approvals (to name a few benefits).

1. To define more detailed artwork information, click on the checkered area above the placement name you want to edit in the artwork section at the top right of the orders screen. The screen will jump to the artwork screen (artwork tab) for the order and show the appropriate vertical tab displaying the data for that artwork placement (out of the four possible placements you can define for the order).
2. Add a thumbnail (image) of the artwork by clicking on the + icon in the checkered artwork area. A dialog box will pop up asking you to choose a file from your computer. **It is highly recommended to save your artwork in your graphic program as 24-bit transparent PNG Files with no background to import into T-Works Manager as they work the best when using the Layout approval sheet.**
3. Define the artwork dimensions by entering them into the **Width** and **Height** fields.
4. Define a reference point for the artwork positioning on the garment in the **Reference Point** field. For example, 3" down from the bottom of the color or 8" from high point of shoulder.
5. Define the ink or thread colors for that placement by clicking in the **Colors** fields and selecting a color from the list of colors from the Colorset ink colors database (See defining Colorsets for more information on customizing ink or fabric color sets).
6. You can use the **Notes** field for keeping information about the artwork while it is being received and processed. This a good way to communicate and stay on the same page with Sales people, artists and production as each person on the network can view this field.

Tips:

Use the timestamp tool after adding to the notes to record date and time of your entry.

Use the formatting tools to add emphasis and make communication clearer and more organized.

Notes Timestamp   

Left Chest Art text:
OJAI BREW PUB (use vintage brewery style text)
RESTAURANT & BREWERY (drop in script tail)

Back Art text:
OJAI BREW PUB
(same as left chest, incorporate tower art & mountains into design)

11/4/2008 1:35:48 PM

7. The **Related Documents** section of the Artwork screen is an area to store references of the files on your computer related to the order. Referencing files allows a user to open the file in its native application from T-Works Manager. To add a document, click the “+” icon and select a file from your computer or network.
8. To print an art approval see “**Printing Forms & Creating PDF Documents**” later in this manual.
9. To edit other placements for the order click on the appropriate vertical tab in the artwork screen and repeat steps 2-5.

Defining Line Items for an Order

After you've defined the placements and artwork for the order, you can begin adding line items to your invoice or estimate.

1. Click on the Orders button in the blue header. In the middle of the screen there is the line items section separated into two tabs called **Sizes** and **Pricing**. Start in the Sizes screen to enter in quantities, then move on to more detailed pricing in the Pricing tab.
2. To add a line item, start by clicking on the **Item No-Description** field and selecting a product from the list of products from the Vendors Database. It is not necessary to choose from the list, you can click in the field again to type in your own item description (this will not be saved for use in another or future order).
3. Check or uncheck the **Tax** field to define if this line item is taxable or not.
4. Define a vendor by clicking in the **Vend** field and selecting a vendor from the list of vendors in the vendor database.
5. Define the garment color by clicking in the **Color** field and selecting a garment color from the list of garment colors in the Fabric colors colorset database.
6. Enter the quantity for each size for that item in the **XS, S, M, L, XL, 2X, 3X, 4X, 5X** fields. Modifying the values of any of these fields will update the total quantity in the **Qty** field. It is not necessary to enter quantities in the size fields, if a line item has no size (like a coffee mug for example) you can just enter the qty in the Qty field.
7. Click on the Pricing Tab to define pricing details.
8. Check **Case** pricing if you have case pricing and all quantities for each size for that line item have the same wholesale cost to you or not.
9. Define how much you want to markup the wholesale goods for that line item by clicking in the **M/U** field and selecting a markup percentage or clicking again to define a different percentage (**make sure you put the decimal character in the proper location when entering a percentage**,

for example 15% should be entered as .15). This markup percentage can be automatically entered in by checking and defining the default markup percentage in the Settings screen.

10. Choose the Price List you want for print/embroidery pricing for the line item by clicking in the **Price List** field and selecting a price list from the list of price lists in the Print Prices database. This price list will base the print costs for each placement on the amount of colors or stitches, quantity and line grouping defined for that line item.
11. Define the Line Group for the line item by clicking on the **Line Grp** field and choosing a group from the list of groups. Line Grouping is a way to group line items together so that they share the same print pricing based on the total quantities they have combined. For example if you have screen printing and embroidery on the same order you would want to group the screen printing line items with Group A, and the embroidery line items with Group B.
12. Define the placements that will print on the garment for that line item by checking or unchecking the placements. This allows you to have more accurate pricing when, for example, some shirts have only a front print and other shirts have printing on both front and back.
13. You can override the total unit cost by checking **O/R** and entering in the unit cost in the **Unit** field.

Defining Additional Fees for an Order

You can add any type of additional fees to an invoice or estimate including fees based on a percentage of the subtotal, grand total or balance due. Follow these steps to add additional fees to an order:

1. Click on the Orders button in the blue header. At the bottom middle of the screen go to the Additional Fees tab section. Click the + Add button to create a new fee.
2. In the **Code** field, select an additional fee from the list of additional fees from the Additional Fees Database. After you select the fee, the description, percentage (if applicable) and rate are automatically filled in. It is not necessary to choose from the list, you can create your own customized additional fee by defining the **Qty** (quantity), entering a description in the **Desc** field, entering a **Rate** in the rate field or defining a **%** percentage. If the fee is based on a percentage, it is necessary to choose either subtotal, grand total or balance due in the **Based On** field to specify a basis for the fee.
3. After you've completed defining a new fee, the total will be automatically added the order.

Entering Payments, Discounts and Required Deposits

To enter payments, discounts and required deposits (which shows on the invoice or estimate, how much of a deposit is required to be paid by your customer before any work is performed on their order), click on the Orders button in the blue header. At the bottom middle of the screen click on the Payments tab (next to Additional Fees) to go the Payments section.

To enter a Payment:

1. Click on the **Date** field to bring up a drop down calendar to select a payment date.
2. Click or tab into the **Payment Description** field to enter a description of the payment like payment method, check number, credit card number etc.
3. Enter the payment amount in the **Amount** field. This payment amount will be automatically deducted from the Balance Due.

To enter a Discount:

1. If you want to discount an order, you can either discount based on a percentage of the total order or a fixed amount. There are two fields that are not labeled to the right of **Discount**, the left one is the percentage field the right one is the fixed amount field.
2. To enter a discount based on a percentage, select a percentage amount from the drop down list of values in the percentage field. If you want to enter a different percentage, click on the percentage field again and enter in a value **(make sure you put the decimal character in the proper location when entering a percentage, for example 15% should be entered as .15)**. After defining, the dollar amount of the discount will be automatically entered in the fixed amount field and deducted from the Balance Due.
3. To enter a fixed dollar amount discount, simply enter the figure in to the fixed amount field.

Adding Tax to an Order

There are two tax fields for compatibility with U.S. , Canadian and UK tax requirements. To tax an invoice or estimate, you must check/uncheck the tax field on each line item that is taxable in order for the tax to calculate and be added to the grand total.

You can customize the description of the tax, by defining as state, province, or type (like VAT , GST etc.). To customize the description, edit the field (not visible) just to the right of the word "**Tax:**" at the bottom right of the orders screen (works for both tax fields).

To define/edit the tax rate for either tax field, click just left of the word "**Exempt**" in the **Tax Rate** field **(make sure you put the decimal character in the proper location when entering a percentage, for example 8.25% should be entered as .0825)**.

To make an order tax exempt (and bypass all taxable line items), check the Exempt check box.

Tip: Set T-Works to automatically fill in the tax rate when creating a new order by checking and defining the default tax rate in the Settings screen.

Marking Invoices as Paid

To Mark or UnMark an invoice as paid, click the “Mark Invoice as Paid” button at the top of the screen in the blue header. When marking as paid, the invoice will show “PAID” in bold red text. Marking invoices as paid is helpful to sort/omit out of current orders when running reports.

Record Lock

Record lock prevents records from being accidentally modified. To lock a record, click the lock icon in the upper right corner of the screen. The icon will show a locked lock. To unlock a record, click the icon again and the icon will show an unlocked icon.

Printing Forms & Creating PDF Documents

In T-Works Manager, there are many forms that can be printed or saved as PDF documents. These forms include:

Form:	Printable from Layout:
Sales Reports	Home
Invoice & Estimate Forms (with or without Artwork showing)	Orders > Form
Work Order Form	Orders > Form
Packing Slip	Orders > Form
Art Approval Form (1up, 2up & 4up)	Orders > Artwork
Layout Approval Form	Orders > Layout
Tech Sheet Form	Orders > Tech Sheet
Customer List	Customers > Contacts
Purchase Order Form	Purchasing > PO Builder
Print Price Matrix's	Print Prices > Prices

Printing most of these forms is as simple as selecting the Print button in the top left of the appropriate screen (see the table above for where to print out each form). The rest of the forms have their own print button, in the blue header of their respective screens.

Making PDF's of a form requires installing a PDF print driver and postscript interpreter. T-Works Manager comes with both of these in the “Schubec” virtual printer and GPL_Ghostscript, and are automatically installed when installing T-Works. **However, in the future, we are moving away from the Schubec driver because of reliability issues. Instead, for now, we recommend using CutePDF writer for**

creating PDF files. CutePDF writer is a freeware PDF printing utility that works on any version of windows, will make a PDF file of anything that can be printed, is easy to use and works and performs reliably. You can download CutePDF Writer for free at:

<http://www.cutepdf.com/products/cutepdf/Writer.asp>

To Install CutePDF Writer:

1. Download and install Cute PDF Writer from <http://www.cutepdf.com>. This is a free PDF printing utility that will allow you to "print" (or actually save) a PDF of anything that you can print.
2. After downloading, run the setup to install. During installation, the installer will check to see if a compatible postscript interpreter is installed in your machine. If not, it will ask if you want to download and install one. Say yes, as this is required.

Tip: If you choose to use the Cute PDF writer as the only driver for making PDF files in T-Works or you're getting annoying error messages from the Schubec printer, you can remove the Schubec.fmx plug-in from the extensions folder of the T-Works Manager folder inside your Program Files.

To Create a PDF:

1. Run T-Works. When you're ready to create a PDF of a form, click "Print" (or the respective button for the form you wish to print, do not use "PDF to Desktop").
2. When the Print Dialog box opens up, select the Cute PDF Writer from the list of available printers and click "Print".
3. A "Save as" box will pop up asking you what to name the document, and where you want to save the file. Name the document, Save, and you're ready to email the PDF to your client.

To Print to your Printer:

1. Click the Print button in the top left of the Orders>Form screen (or the appropriate print button for the form).
2. A preview of the invoice will display on the screen, and a Print dialog box will pop up. Choose the printer you want to print to. Note: some printers have a printable area that is too small to fit on one sheet and will print the form on one or more pages. In this case, you can increase the print margins in Print Setup (or scale the page down), but rather, it's easier to just create a PDF of the form first (instead of changing Print Setup every time), then print the PDF from Adobe Acrobat (Adobe Reader).

Creating Layout Approvals for an Order

Layout Approvals are a way of showing your customer's artwork mocked up on a t-shirt as it would be printed. They require that a placement record is defined (with location and artwork) for each placement you want to show on the Layout Approval. See "Defining Placements for an Order" and "Defining

Artwork for an Order” earlier in this manual for instructions on creating placements.

The optimal way of creating Layout Approvals are as follows:

1. Click on the Layout Tab for the order you want to create a Layout Approval for.
2. Click on the **Fabric Color** field and select the color of the t-shirt from the list of colors in the Fabric Colors database. See “Creating Colorsets” later in this manual for more information on creating/customizing your own set of colors. You can optionally define a custom color by entering a hex value in the Hex value field

Creating Tech Sheets for an Order

The Tech Sheet tab in the orders database is an area where employees can enter detailed information about production of each placement for an order. Completing a tech sheet for an order is invaluable for use in producing consistent re-orders, and sampling and sending production to an contract printer. The top of the tech sheet area is divided up into six sections: Digitizing, Seps, Screens, Ink, Sample, Production. You can assign each section (task) to an employee, record the date & time when the task was completed and record any notes related to the task. The bottom section of the tech sheet is an area to record detailed screen printing information for a placement.

Follow these steps to create a Tech Sheet:

1. Click on the Tech Sheet Tab in the Orders screen for the order you want to create a Tech Sheet for. Note: creating Tech Sheets requires defining placements (see “Defining Placements for an Order” earlier in this manual for more instructions on defining placements).
2. Click on the appropriate vertical tab for the placement you want to create a Tech Sheet for.
3. Define an employee for a each section (task) by selecting from the list of employees in the employees database.
4. When an employee completes the task, click the clock icon to automatically record the current date & time.
5. Enter any notes pertaining to the task in the **Notes** field.
6. Fill out the print sequence that is used for the placement by beginning with the first line of the sequence (No 1) and enter the film letter that is first in the print sequence.
7. Select an ink color from the **Ink Color** field's drop down list of colors from the Ink Colors Colorset database. Type “Flash” in this field to show the sequence as a flash cure.
8. Select a ink brand/manufacturer in the **Mfr** field's drop down list of ink manufacturers.

9. Select a Type or Series of ink in the **Type/Series** field's drop down list.
10. Enter details about the ink in the **Details/Formula** field like any additives used or formulas.
11. Enter the mesh count of the screen in the **Mesh** field.
12. Enter the Squeegee durometer used for the screen in the **Squeegee** field.
13. Enter how many squeegee passes were used for that screen in the **Pass** field.
14. Enter any additional notes for that screen in the **Additional Notes** field.

Creating Purchase Orders

The Purchasing screen in T-Works Manager is a database of purchase orders designed to be sent either to your wholesale vendors for ordering goods, or contract printer/embroiderer/artist for production.

To Create a New Purchase Order:

1. Go to the Purchasing screen.
2. Click the New button at the top left.
3. Select a Vendor from the drop down list of customers you've defined as vendors in the customers database in the **Vendor** field that you're sending the purchase order to.
4. Select a Ship to address for your company from the database of shipping addresses you've defined in the Settings screen.
5. Select the payment terms for the PO in the **Terms** field.
6. Select the preferred shipping method for the goods in the **Ship Via** field.
7. Enter a description of the Purchase Order in the **PO Description** field.
8. Next, create your line Items either by defining each line item individually or by selecting a line item from an order using the Sales Order Selector. To create a line item using the Sales Order Selector, click on the order to highlight, then click the "Add" button next to the line item you want to add to the purchase order. After selecting the line item, the line item will show a green check box indicating it has been added to the purchase order.
9. To create a line item without using the Sales Order Selector, enter the quantity of the

line item in the **Qty** field, the description of the line item in the **Item No-Description** field, color of the item in the **Color** field, size breakdown of the item in the **Sizes** field and unit cost in the **Unit Cost** field.

10. Enter the shipping cost in the **Shipping** field.

11. Enter a tax rate in the **Tax** field.

Creating Colorsets

The Colorsets screen is a database of colors that can be used when choosing ink or fabric colors within T-Works Manager. By default, T-Works Manager comes preloaded with Hanes and Gildan fabric colors, and Wilflex, Rutland and Union ink colors.

To create a new colorset:

1. Go to either the Ink Colors to create a new ink colorset or the Fabric Colors screen to create a new fabric colors set.
2. Click the New button in the top left of the screen.
3. Enter a name/description for the colorset in the description field.
4. To add a new color to a colorset, click the “+” icon and enter in a color name and either RGB or hexadecimal value.

Generating Reports

Follow these steps to create a report:

1. Go to the Home screen.
2. Do a find for the records you want to report on. For more detailed information on finding records, see “Finding Records” earlier in the manual.
3. Check the box next to “Summary 1:” and select a category from the list of summary types to summarize the records. If the box is already checked and a category already defined and the list of records is not summarized, then uncheck and check the box again to refresh.
4. Check the box next to “Summary 2:” and select a category from the list of summary types to sub-summarize the first summary. If the box is already checked and a category already defined and the list of records is not sub-summarized, then uncheck and check the box again to refresh.
5. Click the Sales Report button in the blue header to print or save the report as a PDF.