



Keystone NEWS

June 30, 2006

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GRADE YOUR OPERATION

Over the years, we have seen some businesses that just seem to be more successful than others, no matter what the current level of the economy. We continually look for ways that our software can help: better management reports and tools, better help screens, better security, and better flow of information through our software. There are many things you can do within your organization to ensure the success, profitability and continuation of your business. If you do not know how to use the available tools, or just ignore them, they cannot help you. Following are some areas to check in your operations. They are not really about our software or trucking or battery distribution, but just business sense to help protect and grow your business.

You should be able to check success or completion in all these topics. If you are not able to mark YES to any of these, you may want to review that area to get it up to standard.

All companies should be at this level, and many of our clients are. Please feel free to contact us if you are having trouble in any of these areas.

ACCOUNTING

- ___ You got a FINAL Income Statement and Balance Sheet for May 2006, by June 30, 2006.
- ___ Run an AR aging report as of May 31, 2006. Does it match what is on the balance sheet for May 31, 2006?
- ___ Is your AR aging clear of old unallocated credits?
- ___ You know the procedure for dealing with an NSF check.
- ___ Your bank reconciliation is current through your last statement from the bank.
- ___ Bonus: You make monthly depreciation entries and adjust at the end of the year.

SYSTEMS

- ___ Find your most recent backup. Is it under two days old?
- ___ Is it on a CD, DVD, or tape?
- ___ Does your backup procedure include always having a recent copy off your premises?
- ___ Restore your backup on to a different computer than your server. Did you get all the data files you have on the server? Are they a current date? (Last week we had a client who has been backing up every night to a zip drive, but the drive was broken for the last 8 months!)

- ___ You have installed a Keystone software update this year.

CONTROLS

- ___ The person getting the mail & doing the actual bank deposit is different than the person recording the deposit. (Prevent embezzlement!)
- ___ The person doing the accounting is different than the person doing the bank reconciliation. (Owners should do the bank reconciliation. It is not difficult.)
- ___ You make regular collection calls. This not only improves cash flow, but can turn up inconsistencies between your records and those of your customers.

USERS - EFFICIENT USE OF PROGRAMS

- ___ Users know what it means when a grid or field is shown in light yellow? (Double-click for more information!)
- ___ Users know the short cut to enter in today's date?
- ___ Users know where to use the right-click in our software?
- ___ Users exit out of our software when not in use.
- ___ Users know how to send an invoice via an attached PDF.
- ___ Users are cross trained so vacations and terminations are easy transitions.
- ___ You have looked at a help video.
- ___ Can make a collection call, enter in an invoice, and listen to a boss all at the same time.

HOW DID YOU DO?

As mentioned above, all these areas are important to some extent. Here is a yard stick to see where you stand.

15 or less: You are leaving your business exposed to risks, both internal and external. You would do well to work with both your accountant and Keystone to establish stronger controls and gain more efficiency in your daily operations.

16-21: You are well on your way to success. Each question you were unable to answer in the affirmative points out an area in which you can better protect the assets of your business or use your staff, software investment or management tools more effectively.

22: Great! Keep up the good work.

FEATURED OPTION

Are you looking for a way to keep your office staff and your drivers (and their spouses) happy? Have you looked at Keystone's Direct Deposit option?

Settlement day can be hectic, dealing with last-minute paper work, trying to get checks in the mail. Add to that a spouse hanging around the office, or calling every half hour to see if the checks are ready yet.

What if you could run the settlements a day early and just e-mail a file to your bank. They can deposit your employee payroll checks or your owner operator checks to their checking or savings account, even if they do not bank where you do! Plus, they do not have to wait for the mail delivery.

Call to learn more about this great driver benefit and time saver.
Keystone Systems Sales: 1-888-863-9833

WHERE DO YOU USE THE RIGHT CLICK?

In the Grade Your Operation article in this newsletter, we mentioned the right-click feature. Then we got into a discussion as to how we would be able to answer that question! Which inspired this article. The right-click (of your mouse) is a useful option to quickly access information or clear fields within your Keystone Software. We try to use Windows standards within our software, such as clicks, tabs, and drop-down menus. The right-click is not very tightly defined, so we use it for different things within our software. Since there is not a visual cue to remind you to take advantage of the right-click, we thought we would take this opportunity to point out some places where it can come in very handy.

Here are a few places where it is used in Keystone Systems' software:

Right-click Find button: You will notice that most FIND BUTTONS on a form have a little (r) after the word Find. This is a reminder that you can right-click the find button to do the same thing as find button, except you will be back in the lookup list where you last left it. So if, for example, you might be looking at invoices in invoice number order, and call up an invoice. When done with the invoice, right click the find button and you will be back at the find screen at that invoice number. Then you can down arrow one line to get to the next invoice number without having to type in the number again. This also will work if you are looking at invoices for a given company. Just find the first one, and the when you want to go to the next invoice for that company, right click the find button.

Right-click a drop-down list: Some fields are initially blank, but provide a drop-down list of possible answers. For example, in TR/AP, Lists, Company screen, AP Tab, you can select AP Group, or AP Terms. If you later change you mind, deciding not to have anything for the default, you will find that "blank" is not a choice. Just right-click and choose "Blank."

Right-click invoice on the AP/TR, List, Company, Balance tab: When making collection calls, do you ever have a question as to what invoices were paid by a customer's check. Or, which check(s) got applied to a given invoice? Call up the company record from anywhere in the trucking program, go to the AR Bal tab. You will see a list of every invoice charged to a customer and every check you have received. Just Right click on an invoice and you can either call up the original invoice (TR or BT-battery) or call up a list of all checks that have been applied to the invoice. Right-click on a check to see a list of invoices to which it was applied.

Right-click in on a load or trip in Dispatch Central: To move from the Dispatch Central screen to the details of a load or to dispatch the load, you probably know there are menu selections you can make. Did you know you can right click a load and choose between: Trip (to go to the associated trip), Order (to go to the details of the order), New Order (to start a new order - of course!), Dispatch (to assign this order to the truck that has been selected on the Resource section of Dispatch Central), or Find Closest Truck (to show which trucks are close by - as the crow files - and when they will be available).

So, if in doubt, try a right click. In the worst case, nothing will happen!

CHECK OUT SOME NEW FEATURES

TR 04/14/2006 DISPATCH COLUMNS CHANGES SAVED

The computer now saves the order of your grid columns when you use the button SAVE AS PROGRAM START SETTINGS (TR, Dispatch Central, Filters). If you are a dispatcher who likes to change the order of the columns, this will save you time when you start the dispatch screen. Note: You can also save column widths, or even hide columns you do not use.

TR 05/10/2006 PC*MILER INTERFACE CAN NOW USE 53'TRLR OPTION

The 53 foot trailer was a feature that PC*Miler added with version 16, so you must have version 16 or higher to use this feature. This will let you restrict the routing to roads for allowing 53 foot trailers. This can add more miles for a given route because it will not use any restricted roads. It will use the practical set of miles for the other roads.

To check out the latest features in Keystone's Software, click on the Latest Software Changes button on the log-in screen (where you type your name to start the Keystone software).

HOLIDAYS

Keystone will be closed:
Tuesday, July 4
Independence Day
Monday, September 4
Labor Day

