



Welcome to Traffic



Developer of the Year (2004)



5 out of 5 mice



5 out of 5 stars



THE QUEEN'S AWARDS
FOR ENTERPRISE:
INNOVATION
2008

Welcome to Traffic

The system has been built for you, your layouts set up and the system checked before dispatch.

We have completed basic system configuration, and included some default / sample data to make setting up your system as simple and easy as possible.

This guide takes you through the main things that you should review / amend before going live with Traffic.

Before your training starts your trainer will review your system settings with you and assist you as required.

This document reviews the main system settings in the “administrator” tab. You will need “Managing Director” or “Administrator” access to the system to complete most of the steps detailed below.

Your Traffic system is already set up in the correct currency, has details of your staff members, your e-mail settings, year end, VAT number ... and your name and address.

This guide takes you through the main settings of the system that you are likely to want to change. These are:

- Your e-mail settings (if not provided at the time of initial setup).
- The terms and conditions under which you do business.
- Additional details about your people, including their cost so Traffic can accurately work out profit on jobs
- A review of how Traffic quotes, together with how much you charge for each



of your services

- Reviewing your expense types and the suggested margin we have applied
- Providing your bank account details so they can be included in remittance advices
- Setting up document management (if this option has been purchased)
- Nominal codes, especially if you have purchased of an accounting integration.

Your trainer can cover with you any settings that are not covered in this guide.

Log In

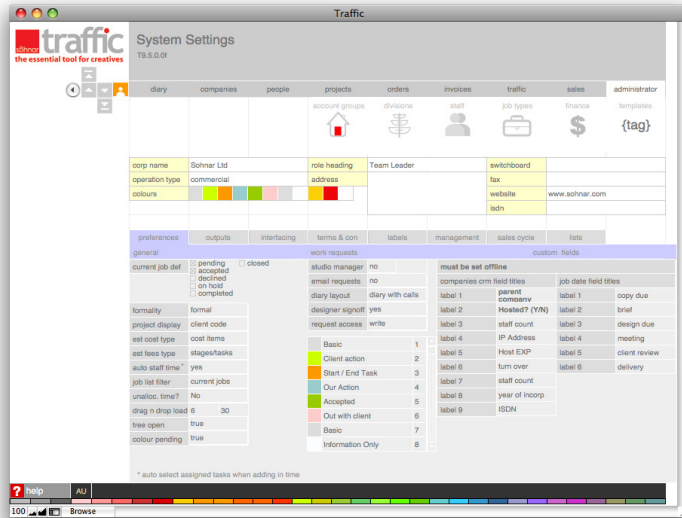
Firstly log into Traffic.

Your user name will be your “firstname lastname initials”. Hence John Smith would be John Smith JS



Your initial login will be “traffic”, please note that passwords are case sensitive. You will be asked to change this to something more secure once you log in. You must change the password to proceed.

Click on “administrator”



You will see the administration screens. As above the aim of this guide is not to go through each setting in detail. All settings are at typical defaults and these can be reviewed with your trainer if needed.

Your E-Mail settings

You should have provided us with e-mail settings when your system was configured, You can check these details as described below. If as you start working through Traffic you find e-mail is not working then please follow the steps below.

There are two main ways that your e-mail system can be set up:

1. One username and password to send
2. Unique usernames and passwords for each user

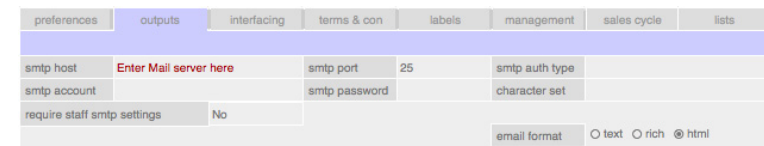
The first option is more usual.

Before continuing please contact your IT person to determine how your email system is set up, and also the respective user names and passwords for it.

Most, but not all, e-mail setups do not require a password to send – only one to receive. You should also confirm this with your IT provider / person.

If you use one username and password to send then please follow these instructions.

Click on “administrator” and then “outputs” and towards the top of the lower panel you will see the e-mail settings you provided us with.



If these are incorrect then please amend them.

If you have put in a password, but the system is still not working, please try removing the SMTP account and password and see if that makes the e-mail functionality work. If not please contact Sohнар Support.

We will do our best to assist you, but we are reliant upon your IT provider giving us the correct settings.

If you use individual usernames and passwords to send mail then

- confirm the SMTP host and SMTP port (usually 25) are correct
- click "staff" on the upper menu, followed by "management"
- select yourself by clicking on your name on the left hand panel. If you do not see it type "all" in the search panel and press "tab"

In the upper panel you will see fields for

- e-mail address
- smtp username
- smtp password

Complete these for one user – you! – and check to see that mail is working. If so, then enter details for each user. If you are still experiencing problems please contact Sohнар Support. We will do our best to assist you, but we are reliant upon your IT provider giving us the correct settings.

The terms and conditions under which you do business

If required you can place your terms and conditions into Traffic.

Click "administrator", "terms and con", "terms of business".



Here you can paste or type in your terms and conditions. In this section you can also edit the default e-mail footers, fax footers, purchase terms and so on.

Additional details about your people, including their cost so Traffic can accurately work out profit on jobs

To enter the staff area click "administrator", "staff".

On the left hand side you will see a list of all your staff members. If this list is blank type "all" followed by enter and all your staff will be listed. Click on any staff name to see the full record.

They should already be set up with their e-mail address (middle of the screen) and their permission level (click on "account", the permission level will be shown on the left hand bottom of the screen).

Permissions will have been set during the build of your system. You are able to set permissions to a fine level of detail, hence controlling what your team can and cannot access. The standard permission settings suit most businesses. If you would like them changed, please either call Sohнар Support or discuss requirements with your Trainer.



You can enter a range of additional information about your people, date of birth, home address and so on.

The only fields that need to be set up in Traffic to ensure its job profit reporting are correct is the cost of your people.

You can enter this as either their annual salary or their hourly rate. Traffic will then calculate the appropriate day rate. The fields for this are on the top left of the “staff” “management” tab.

Traffic allows for overheads. It calculates this by using a ratio between your staff and non staff costs. For a typical design business this ratio is 1.8 which has been set by default. Hence if you enter an hourly rate of £/\$20 the system will show this as £/\$36 to allow for the overall cost of employing that person, including overheads.

If 1.8 is not appropriate to your business you can change it using the “added costs” field which will be found in “administrator”, “management”.

A review of how Traffic quotes

Traffic quotes using estimating profiles found in “administrator”, “job types”, “profiles”

How these profiles work will be covered in your training, and once you and your team become familiar with them you can customise them as you choose.

We have included a set of sample quoting profiles which cover a wide range of creative disciplines. If any headings do not seem relevant to your business then you can edit or simply delete them using the red cross next to the profile. Deleted profiles cannot be recovered.



Profiles work by taking a job and breaking it down into stages and tasks. Each stage / task can have its own chargeband (see below) together with a number of hours against it. The hours can either be fixed or related to the quantity field of the profile – we call this xscale. As an example for a brochure certain aspects will take a relatively fixed amount of time; maybe research; but page layouts will take longer if there are more pages.

Have a click around this section. Our intention here is to introduce the topic and to allow you to delete profiles that do not fit your business rather than to fully tutor you.

How much do you charge for each of your services?

Traffic allows you to charge differing rates for differing activities. We call these Chargebands. All chargebands are hourly rates excluding taxes.

Chargebands are set in “administrator”, “job types”, “chargebands”

Here you will see a list of sample chargebands we have set, together with a default charge out rate for each one. These rates will need amending to match your business.

Please review this list, deleting or amending the activity types and rates as appropriate.



It is important that each rate has a currency set against it or the amount will quote as nil!

Reviewing your expense types and the suggested margin we have applied

Similarly to chargebands, Traffic stores the price and markup of common expense items.

Expenses are set in “administrator”, “finance”, “expenses”.

You will see a range of sample expense categories and types together with a default cost and markup.

The sample values are typical values for the type of services listed. They may or may not be suitable for your business. These can be edited or added to as required. Please note that the default mark-up on smaller items is greater than that on bigger items.

Setting up document management (option)

If the Document Management option in Traffic has been purchased, you and your team will have access to all documents sent by the system, and also be able to attach briefs, artwork and so on which can be viewed by everyone.

For document management to work each user's PC / MAC must be able to “see” the server.

Firstly you should set up a folder on your server, make sure this has sharing enabled and sharing is turned on. If you do not know how to set up a shared folder you should consult the documentation that came with your equipment or your IT provider. We can give general guidance, but are not experts on every potential hardware / software combination.



Next, you need to determine a “path” to your server from your user's PC / MAC. The path for a Mac will differ to that of a PC.

We strongly recommend that for a PC you use the IP address or server name of the server as opposed to mapping it to a drive.

The “folder path” is set in “administrator”, “outputs”. Paste in the relevant filepaths.

If you are using a Mac you will need to “mount” the shared drive. This makes sure the filepath can still be seen after the system has been rebooted.

To accomplish this press “APPLE K” and click through until you find the relevant shared server. Your desktop will then show a file mount icon and the process is complete.

Mac folders are separated by :
PC folders are separated by \

Providing your bank account details so they can be included in remittance advices

Traffic stores details of your bank account (s).



Bank accounts are set in “administrator”, “finance”, “accounts”.

You can enter your banking details in the fields provided, including account type and sort code, etc.

The key field you should update is the “remittance txt” field. This is the text that will appear on your invoices informing clients how to make payment to you. You can put any wording in here – for example “Please make cheques payable to Sohna Ltd” or more likely a request for an electronic remittance for example “Please remit payment to Sohna Ltd, Sorting Code xx-xx-xx Account Number xxxxxxxx. A remittance advise to xxx@xxx.com would be appreciated”.

Troubleshooting

Most installations proceed smoothly. Sometimes things may not work first time. Below are the most common problems and suggested solutions. Sohna support are here to assist you.

I have installed Filemaker on a new machine and it is not working

You have probably forgotten to run the Traffic setup file.
This can be found at [http://sohna.com/\\$client/TrafficSetUp.fp7.zip](http://sohna.com/$client/TrafficSetUp.fp7.zip)

E-mail is not working

E-mail configuration is covered above and is solely reliant upon the correct mail settings being provided.

If mail is still not working Sohna support will assist you, but will need to liaise with someone who understands how your mail and IT network is configured. In rare cases mail is blocked by Firewall settings. This is outside the scope of Sohna Support. We



will assist in every way we can, but the work on configuring your email system must be undertaken by the person or company who set it up.

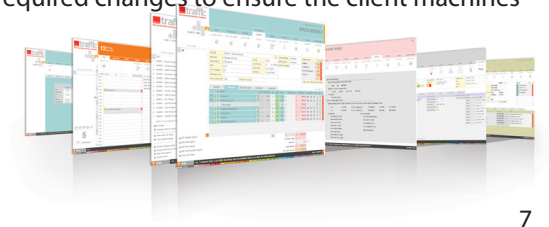
Document Management is not working

If you have purchased the Document Management module for Traffic will store all documents produced by the system, together with any additional client documents you specify, these will be saved to your server.

For this to work the machine running Traffic must be able to “see” the server and hold read / write privileges. If you are working in a remote location, or in the office but not connected to the server you will get a warning when logging on. You may also get a “disk full” message when using certain functions in Traffic.

The path of your server is stored in Traffic “administrator” “outputs”. The system stores a path for a Mac and a PC. The first thing to check is that the machine you are using can see the server path specified. If not you / your IT provider will need to change your server permissions so that this machine has full read / write access to that path.

If the function is still not working then please call Sohna support. We will do our best to assist you. We will need to liaise with the person responsible for setting up your IT system and they will need to make the required changes to ensure the client machines



can correctly access the server.

My layouts (invoice, estimate and so on) look strange!

If layouts look different on a Mac or a PC, firstly, were layouts specified to run on a Mac and PC at the time of purchase? The two layouts are constructed differently. Given that the two render graphics differently, there will always be small variations!

The most common cause of “odd” layouts are problems with the font.

If your layouts look different on different machines, or different on a Mac / PC then it is highly likely that the machine not displaying correctly does not have the font loaded. If you selected the Custom Layouts option you will have supplied Sohнар with fonts for Mac / PC at the time. Please ensure that these fonts are loaded on each machine. Dont forget to import/refresh the template afterwards.

If Sohнар modified your font please ensure that this modified font is installed on each machine.

If this does not correct the issue please call Sohнар Support who will assist you.

Traffic Opener Not Working

The Traffic Opener sits on your desktop and opens Traffic.

In most cases this sets itself up automatically and works without problem. If you have a split network with two or more IP addresses, problems are likely to occur as the system may not be able to find the Traffic Server.

The system can be opened manually without problem.



Sohнар support will provide guidance and seek to fix your issue with a custom opener. If this is a complex process a quotation may be required.

I get the message “You do no have permission to access this area”

The permissions in Traffic have been set to control what people can see and do. If your permissions are incorrect they can be amended by anyone with Managing Director Access.

I have forgotten my password!

Anyone with Managing Director privileges can reset passwords.

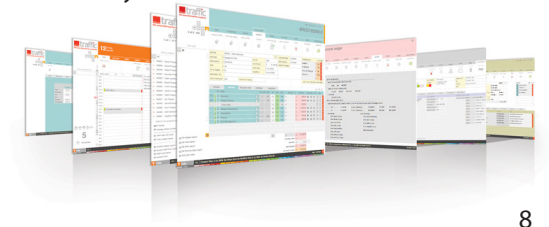
In “administrator” “staff” “account” select the member of staff and click “reset password”.

The users password will be reset to “traffic”.

If you are the MD contact Sohнар support and they will reset it for you.

In Conclusion

As mentioned at the beginning of this document, the aim of this short guide was to complete the essential set up steps of your Traffic system.



You are now ready to go! You will have been sent some quick reference guides to help get you going before your training commences.

Feel free to play on the system. The objective now is for you and your team to read the guides and start to understand what Traffic is doing and how it works, and make sure that you are happy with how the system is working. This will make sure that your training is effective.

Your trainer or Sohнар Support will remove any data you request and so on before you actually go live.

If you need any assistance between now and your training session, please call Sohнар on 020 8600 7530.

The Sohнар Team

