Check Sheet Template Setup Menu

- [Check Sheet Template Setup]
- [Pre Inspection Check Sheet - JC]

Check Sheet Template Setup

Job Costing >Configuration>Check Sheet Template Setup

Before setting up a Check Sheet Templates; answer the following questions:

- What do you want to call the check sheet?
- List all the items for the check sheet
- Categorize the items you have listed.
- Sort items in order of priority.
- Assign questions to items as required. These should be multiple choice type questions.

Note: If question only has one answer rather create a Service Item Question.

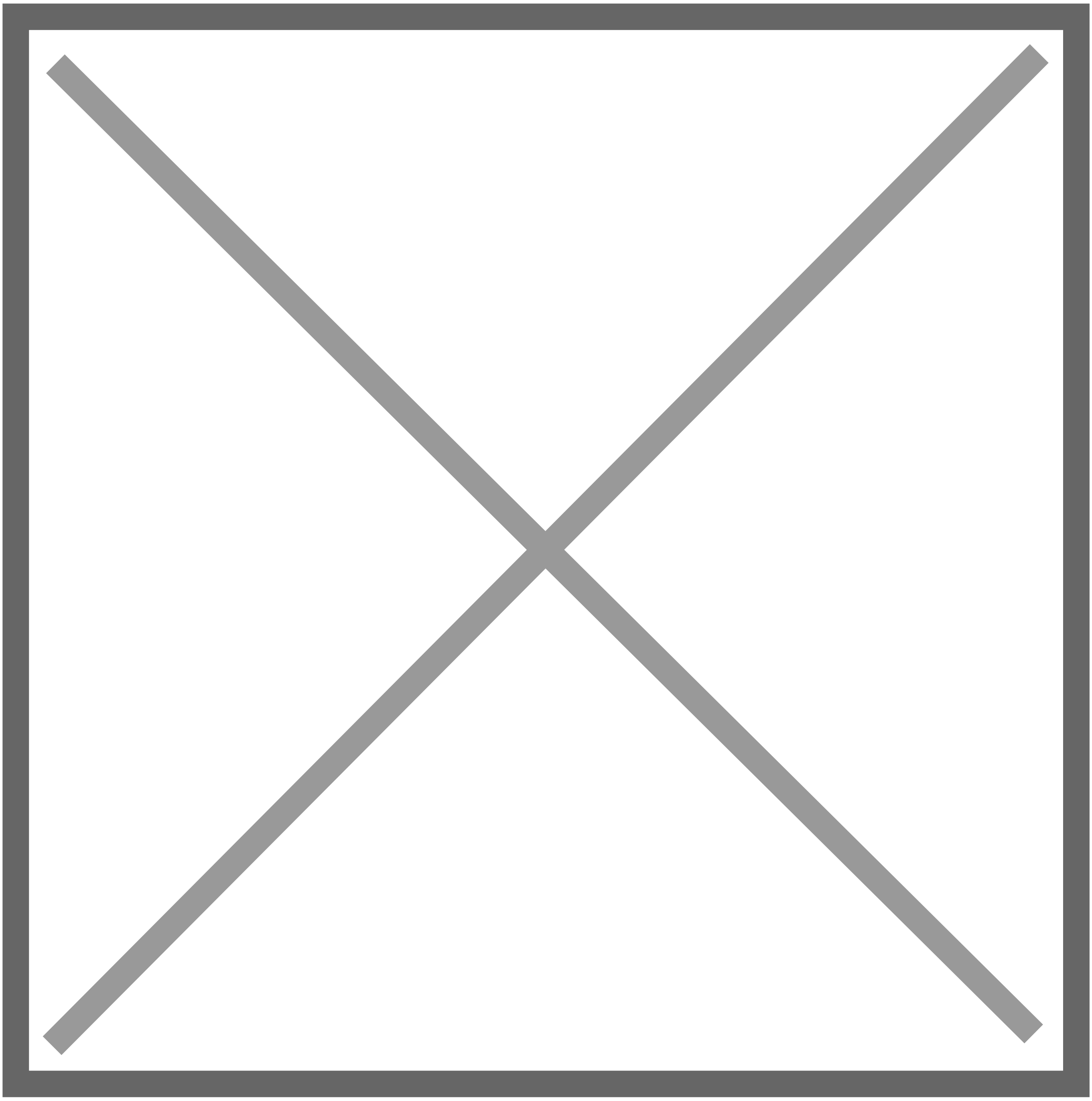
Search button: If the Check Sheet Template Code or the Check Sheet Template Description is

left blank, all Check Sheet Templates listed in the system will be displayed.

By inputting in ether the Check sheet Code or Check sheet Description or part there of you can press the search button and all matches will be displayed on the grid.

If the cursor is placed on Description at the column head, this will sort the Description A-Z or Z-A as preferred.

Navigation Ribbon



The Navigation Ribbon is used to action the following functions:

Search button: the search function will return Check Sheet Template records based on the search criteria entered

Add button: allows you to create a Check Sheet Template

Edit button: allows you to change an existing Check Sheet Template details

Delete button: allows you to delete an existing Check Sheet Template details

Clone button: allows you to copy and existing Check Sheet Template.

Print/Export Drop down:

Print: prints the Check Sheet Template search grid this can either be emailed or physically printed

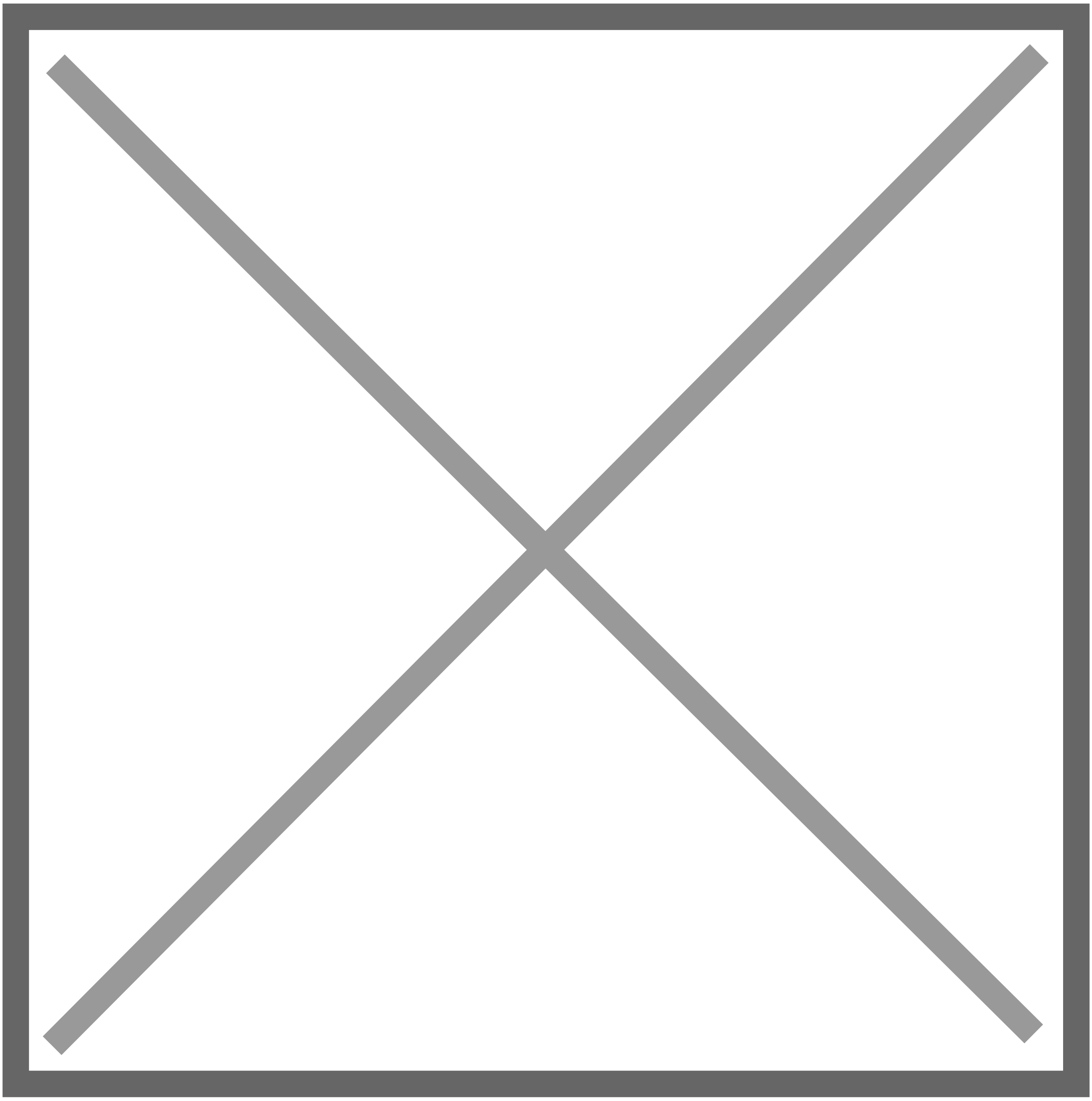
Refresh Grid Icon: refreshes the display grid

On Line Help Menu Icon: displays on-line

Check Sheet Template

New Check Sheet Templates can be created by:

- Add a new Check Sheet Template
- Clone a new Check Sheet Template from and existing Check Sheet Template

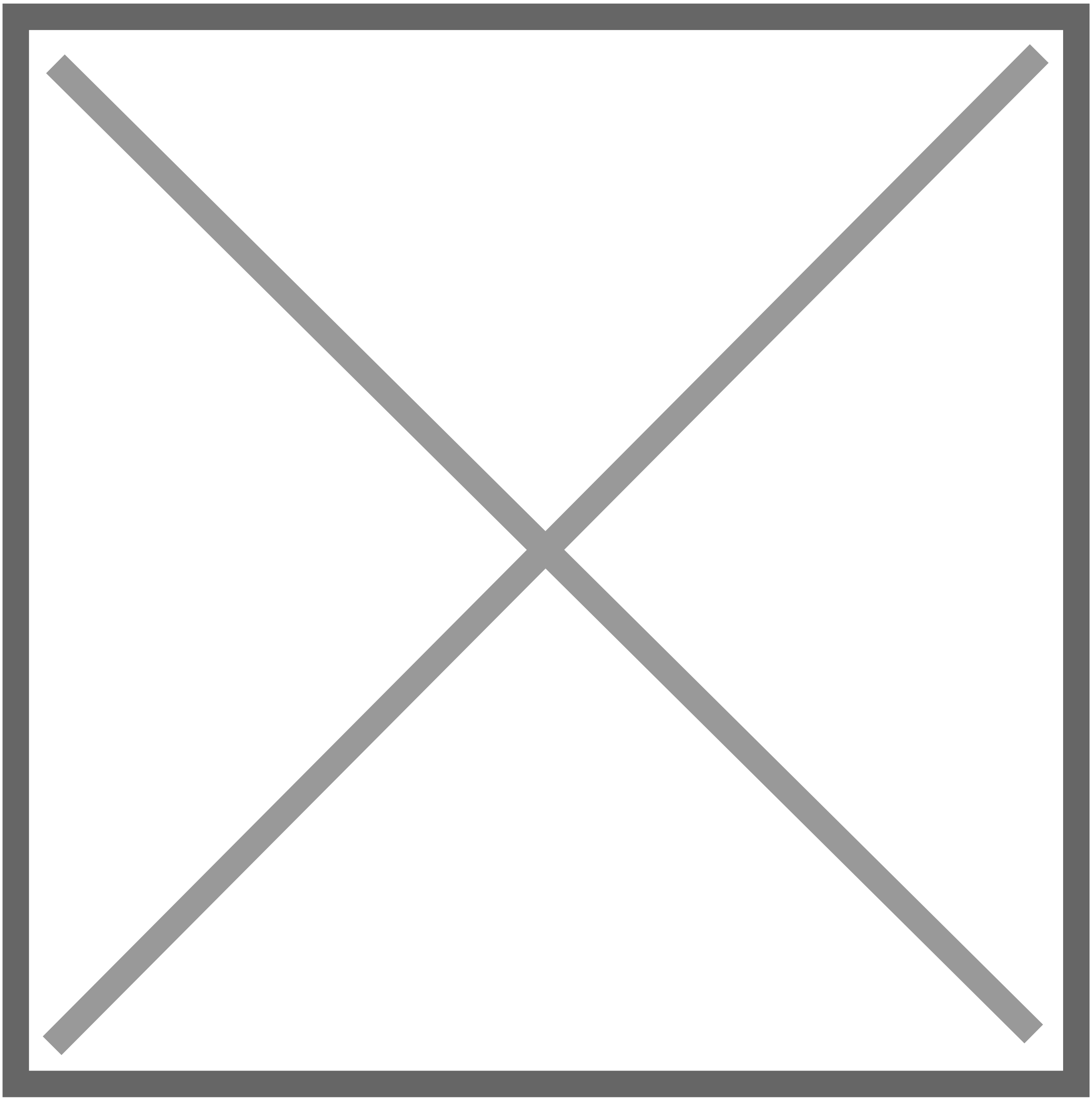


Search button: By inputting in ether the Check sheet Code or Check sheet Description or part there of you can press the search button and all matches will be displayed on the grid.

Active Tick Box: If this tick box is ticked then the search will return all Active Check Sheets. If not ticked then the search will return all inactive Check Sheets.

Note: To clone and existing Check Sheet Template you select the Check Sheet Template you wish to copy from the display grid and select the Clone Button. Input the new Check Sheet Template Code and Description and press the Clone button to create the copy Check Sheet Template

When you select a Check Sheet Template all the active Check Sheet Groups associated with the Check Sheet Template will be displayed on the display grid.



Two Tabs are available

Standard Tab: add the Check Sheet Groups to the Check Sheet Template

Question Tab: add Questions which are relevant to the Check Sheet Group

Add button: to insert a new Check Sheet Group.

Edit button: to view or edit an already added Check Sheet Group.

Delete button: to delete the currently selected Check Sheet Group.

Print/Export Dropdown button: prints the contents of the grid displayed this can either be emailed or physically printed

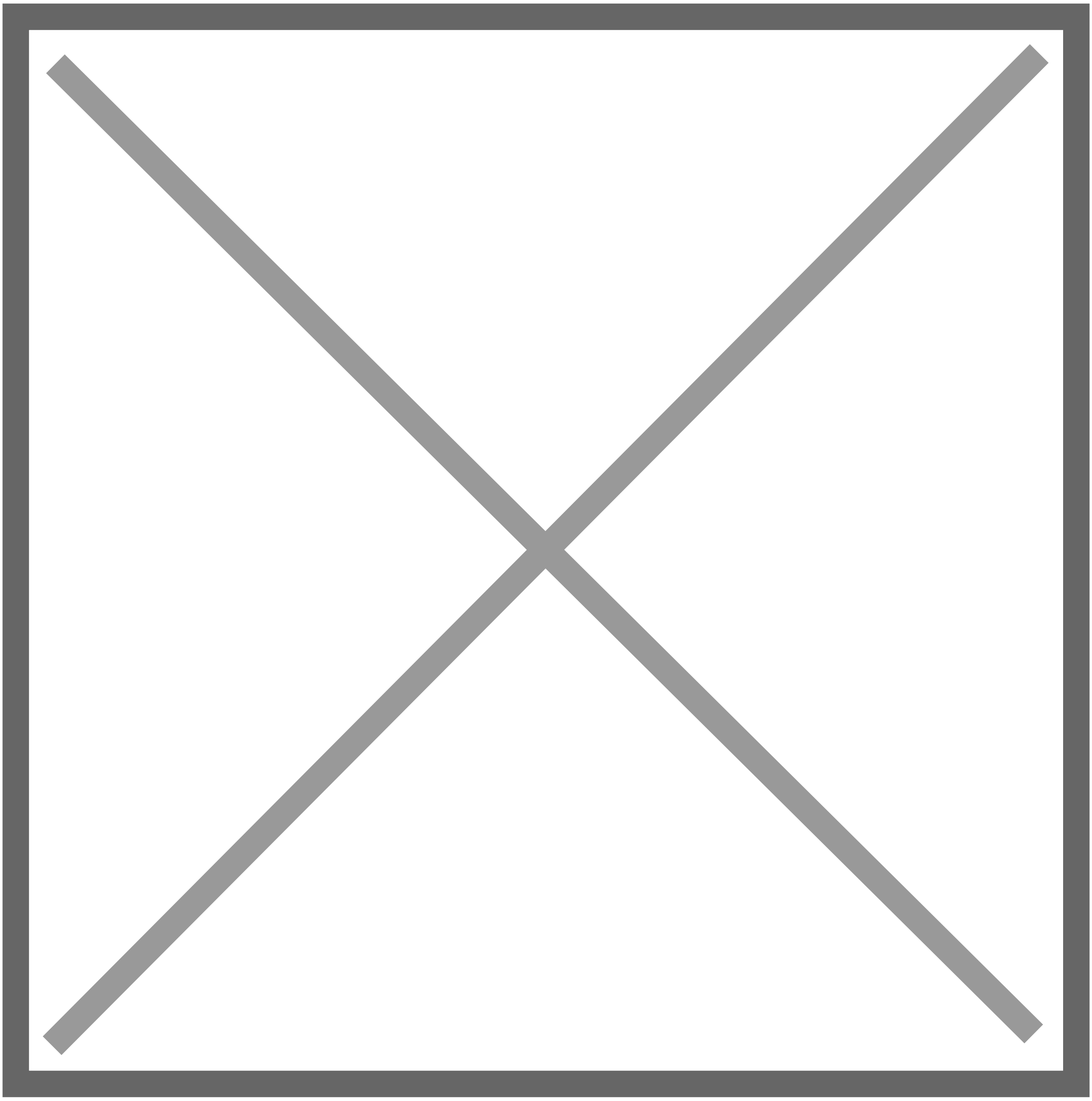
Save and New button: This will save the contents of the window and clear the window for new input.

Save and Close button: This will save the contents of the window and close the window.

Save button: This will save the contents of the window.

Close button: This will close the window and any changes made will not be saved.

Check Sheet Groups are the logical grouping of activities which are used in the Check Sheet Template to create a Check Sheet.



Add button: allows you to create a Check Sheet Template

Edit button: allows you to change an existing Check Sheet Template details

Delete button: allows you to delete an existing Check Sheet Template details

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Group Item

This window allows you to edit the Check Sheet Group Item

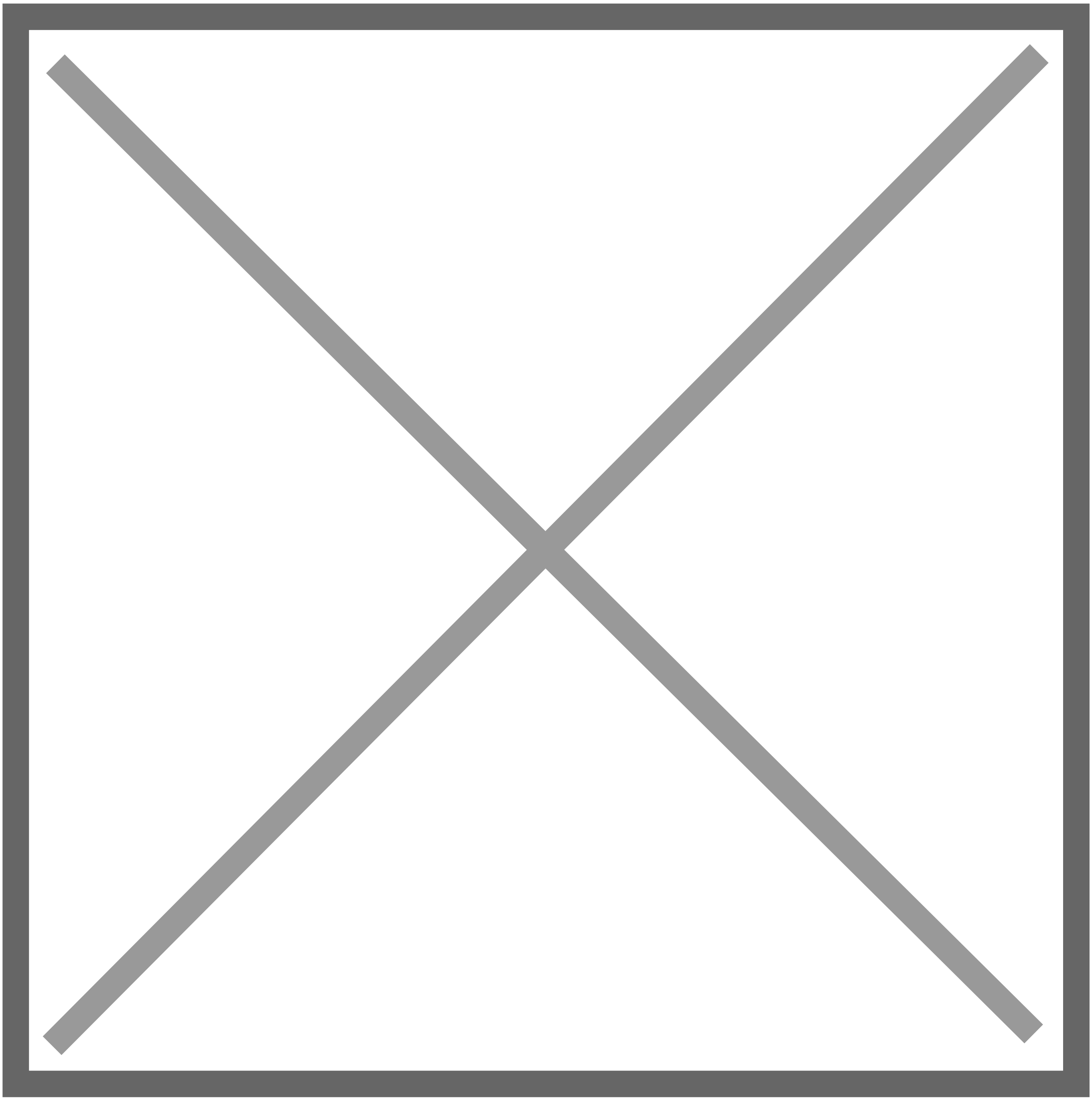
There are three tab options:

Basic: Input the Group Item details

Question Setup: Add, change or delete questions linked to the group item

Item Choices: Only applicable if you tick the “Use Item Choices Tick Box under the Basic tab

Basic Tab



Item Code: the Item Code is selected form the drop down menu

Description: enter the Description of the Item Code

Qty: enter unit of measure taken to complete the Group Item

Department: select the Department required from the drop down menu

Sequence No: enter the sequence number in which the Group item is to appear in the Check Sheet Group

Use Item Choices: If ticketed it will enable the Item Choice Tab form

Save: this will save the contents of the window

Close: this will close the window and any changes made will not be saved

Note: Allow sufficient gaps in your sequence number range so that if you have to add another check sheet item there is space available without having to renumber the whole check sheet

Question Setup Tab

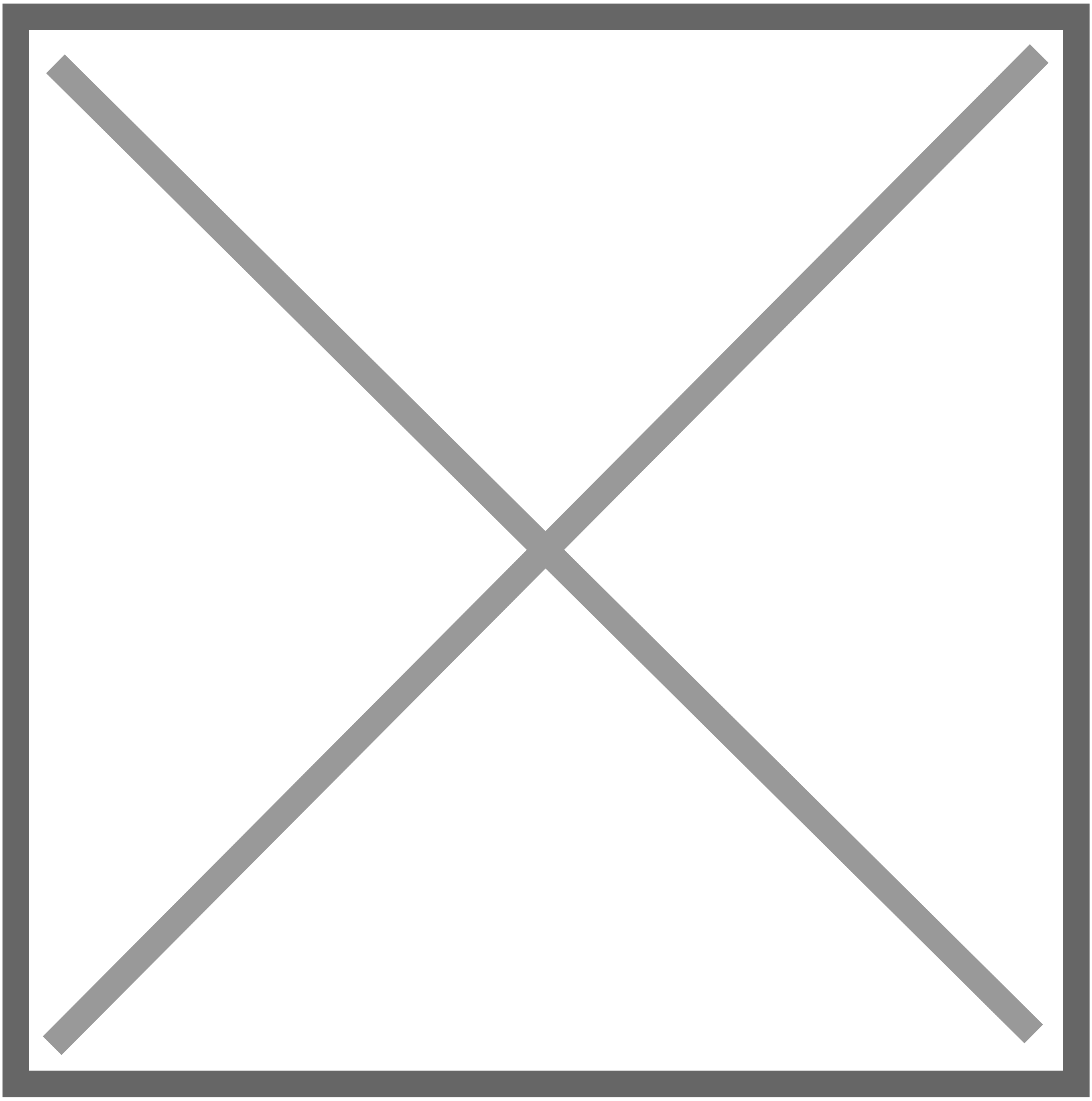
The function of this application is to enable a standard list of questions to be defined which will be used in the Check Sheet Templates where there are more than one selection options available. These options will be listed on the check sheet and the person using the check sheet can mark which option they used.

All Check Sheet Question linked to the Check Sheet Group Item will be displayed on display grid

Add button: to insert a new Check Sheet Question.

Edit button: to view or edit an already added Check Sheet Question.

Delete button: to delete the currently selected Check Sheet Question.



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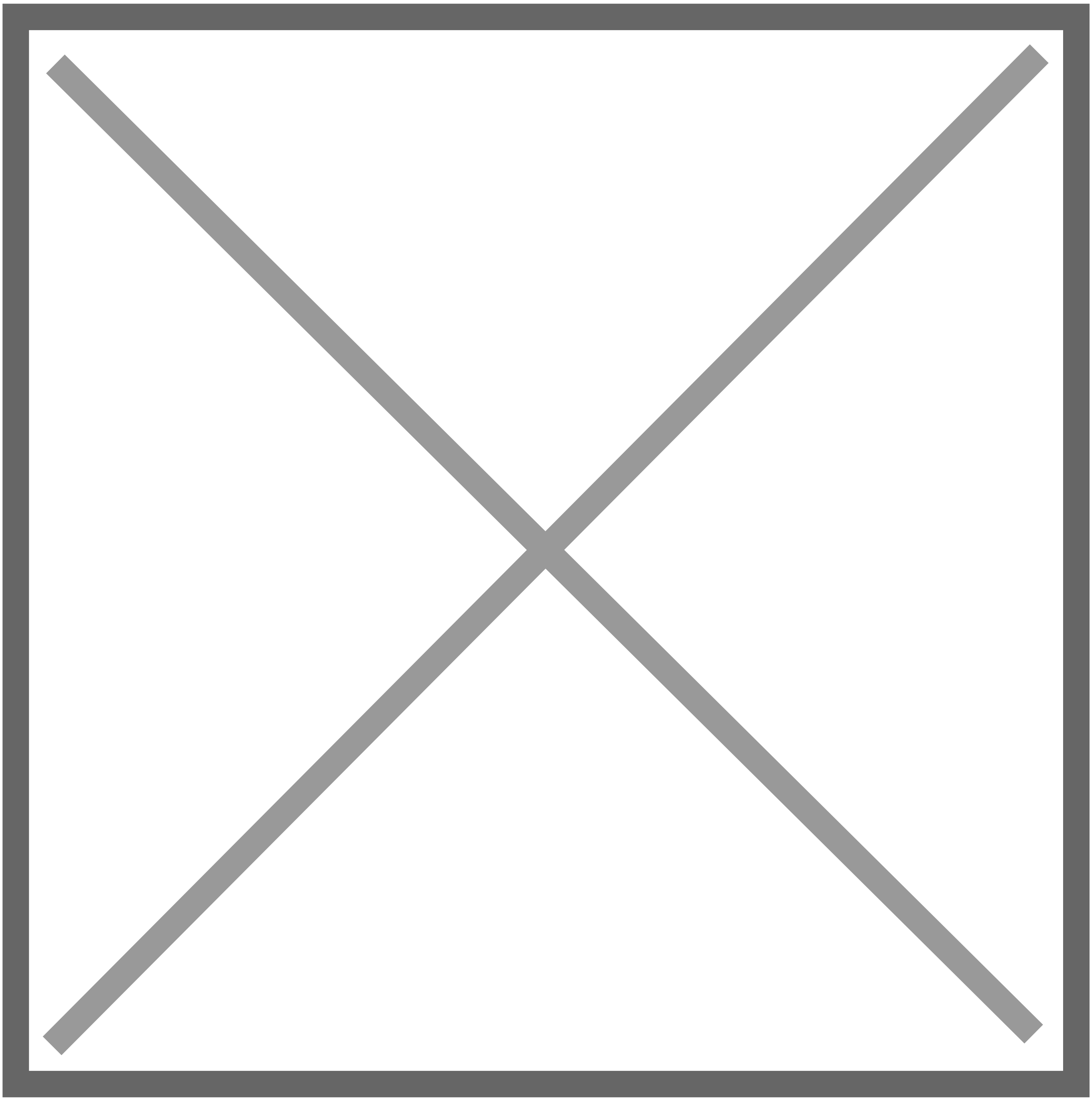
All Check Sheet Question linked to the Check Sheet Group Item will be displayed on display grid

Add button: to insert a new Check Sheet Question.

Edit button: to view or edit an already added Check Sheet Question.

Delete button: to delete the currently selected Check Sheet Question.

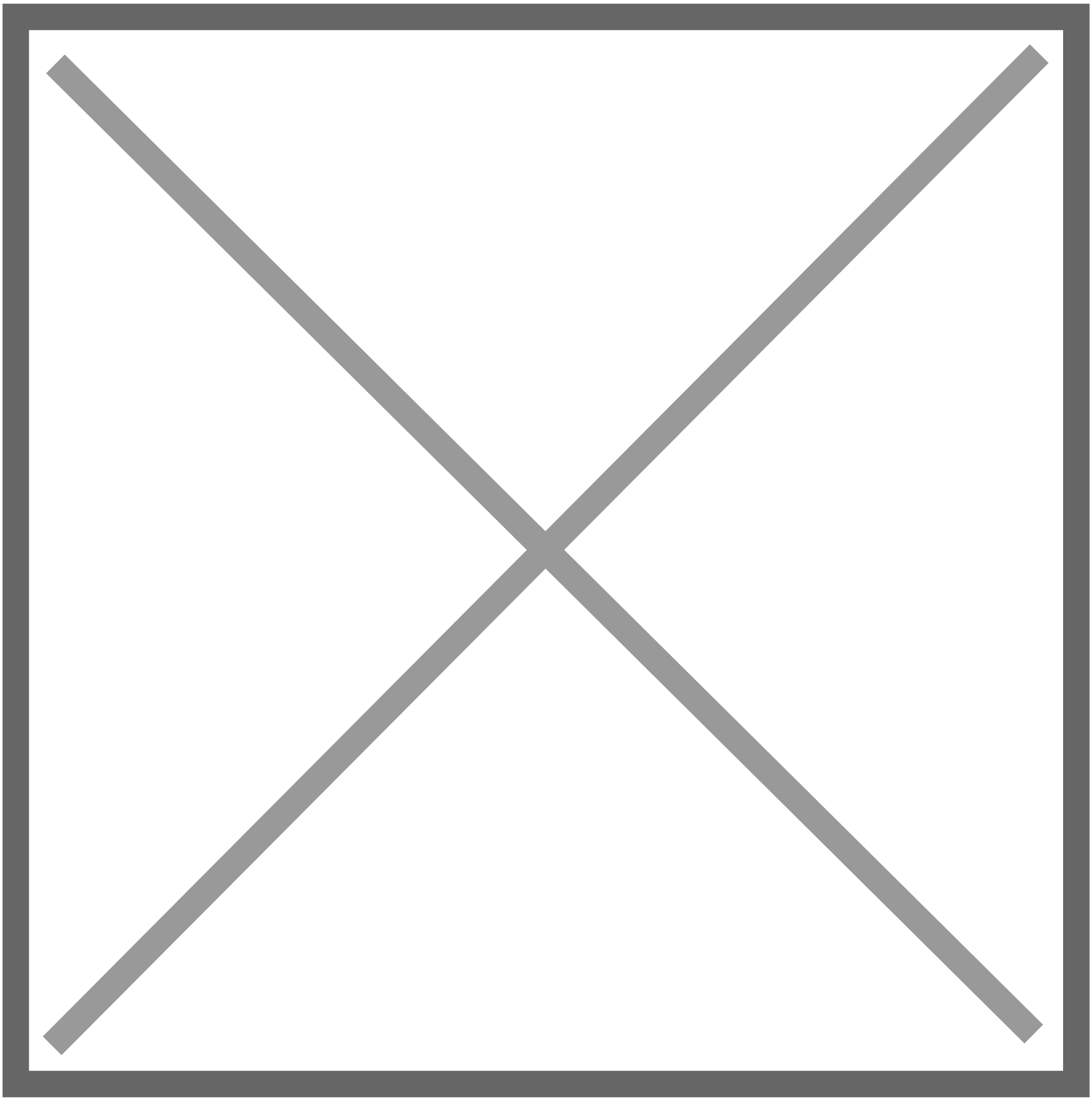


Save: This will save the contents of the window

Close: This will close the window and any changes made will not be saved

Check List Question Options

This window allows you to add, edit and delete Check Sheet Questions



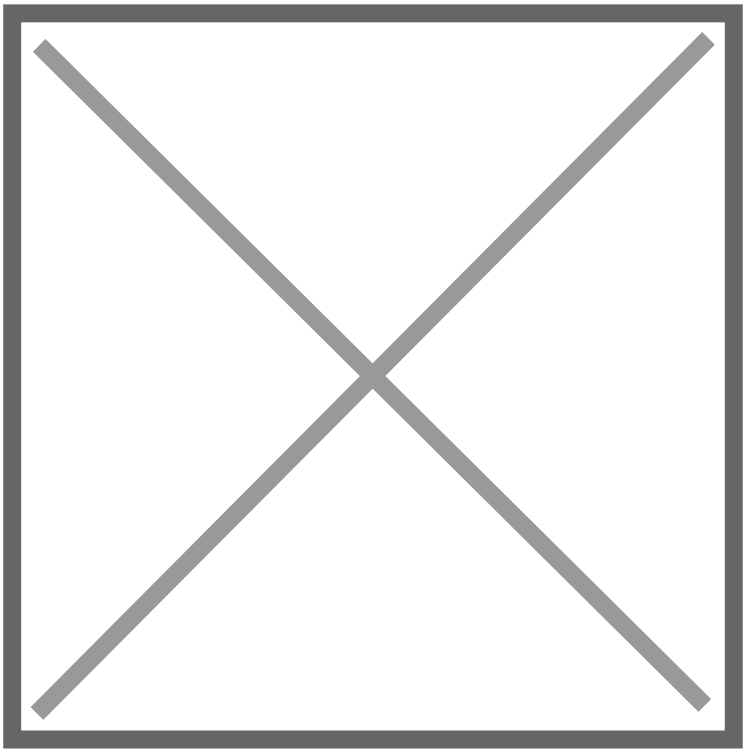
Add button: to insert a new Check Sheet Group.

Edit button: to view or edit an already added Check Sheet Group.

Delete button: to delete the currently selected Check Sheet Group.

Print/Export Dropdown button: option the Print Grid which prints the contents of the grid displayed

Window to describe the Check Sheet Question options



Code: input Question Code

Description: input Question condition

Sequence No: input sequence number of question option

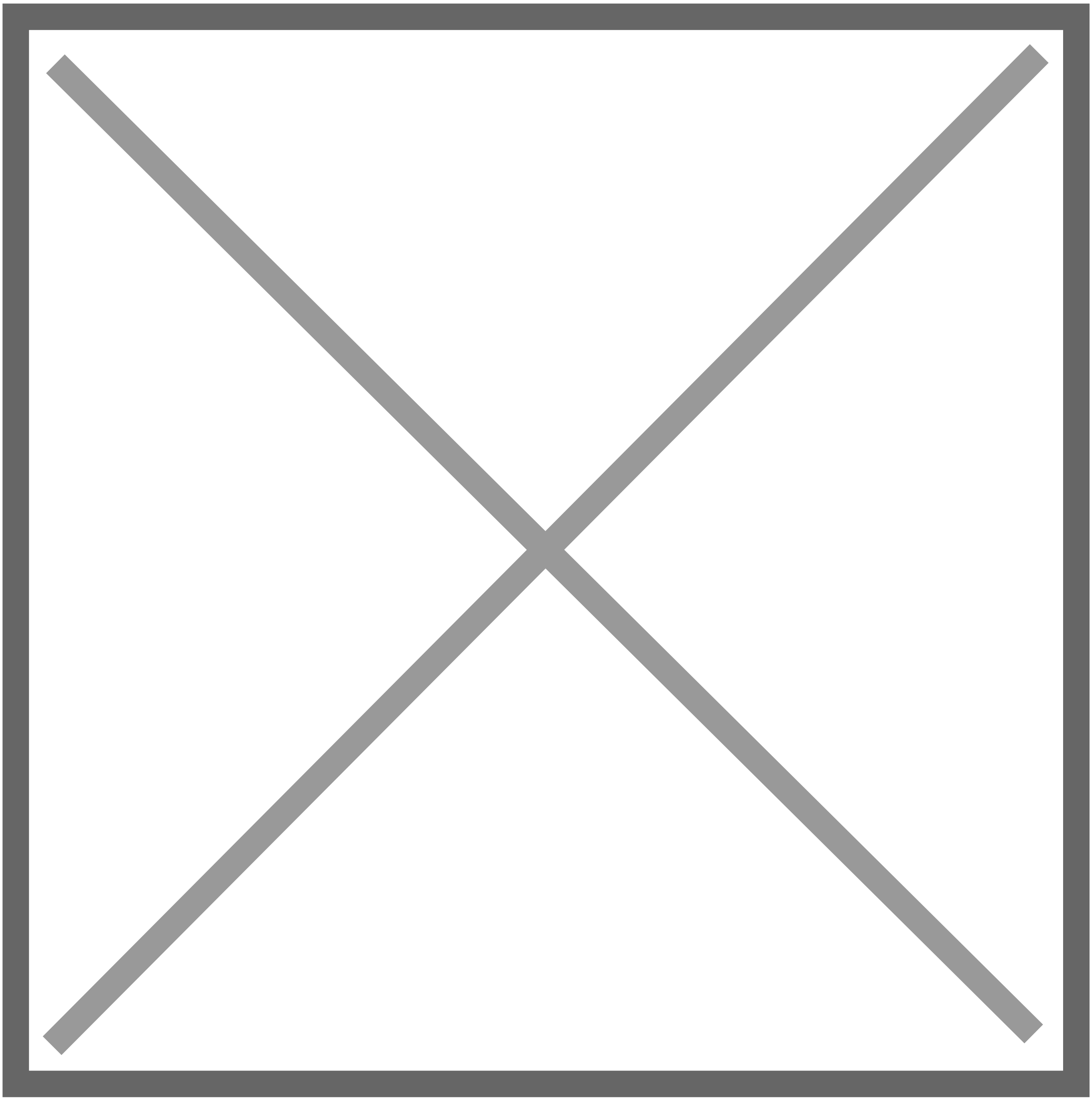
Active: tick the Active tick box is this question option is active

Save and New button: this will save the contents of the window and clear the window for new input.

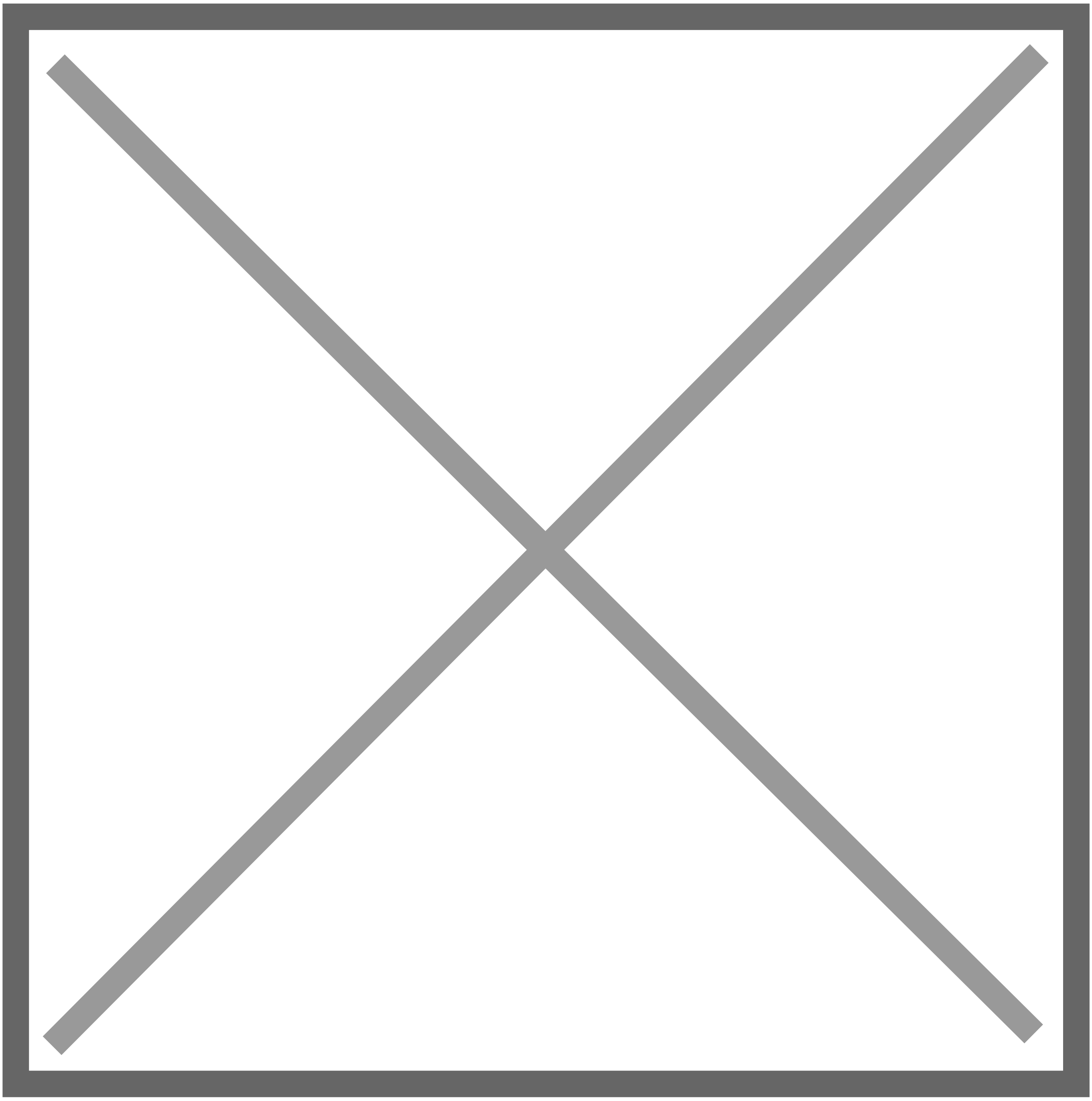
Save and Close button: this will save the contents of the window and close the window.

Save button: this will save the contents of the window.

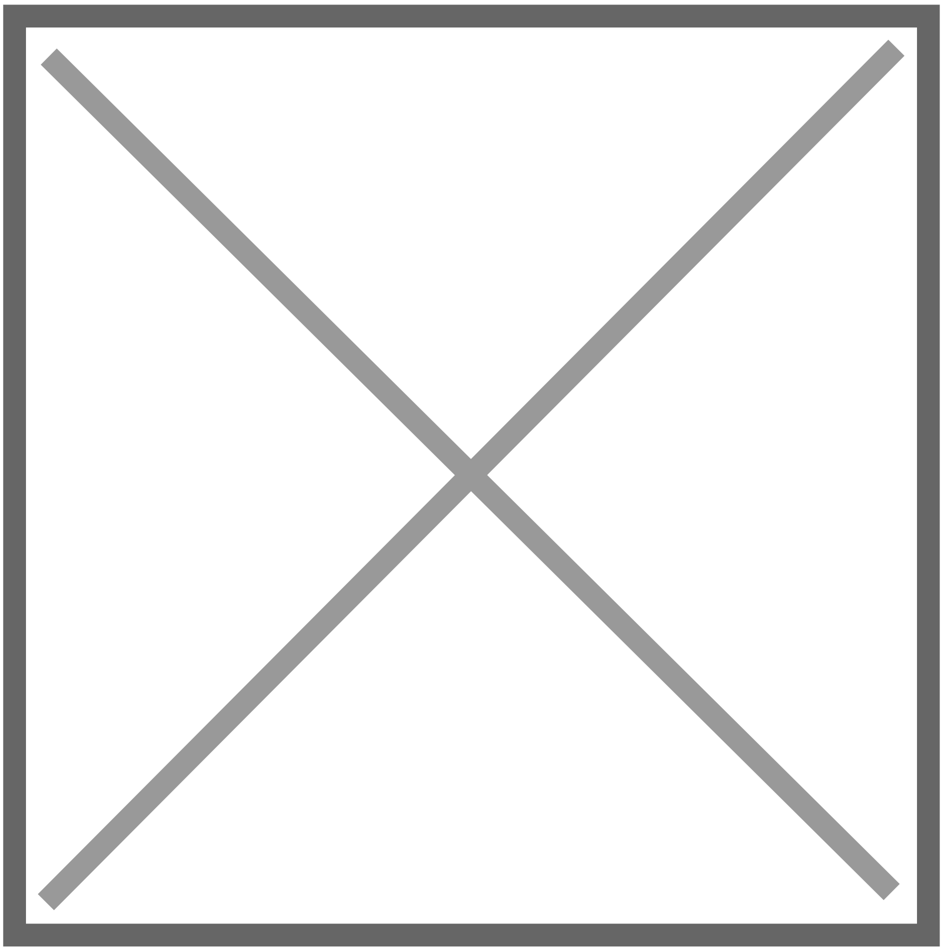
Close button: this will close the window and will not save changes



Item Choices Tab



Add edit or delete



Stock Code: select stock code from drop down menu options drawn from the Inventory Master

Description: description as per Inventory Master; you can change this description

Sequence No sequence number of the item choice

Save and Close button: this will save the contents of the window and close the window.

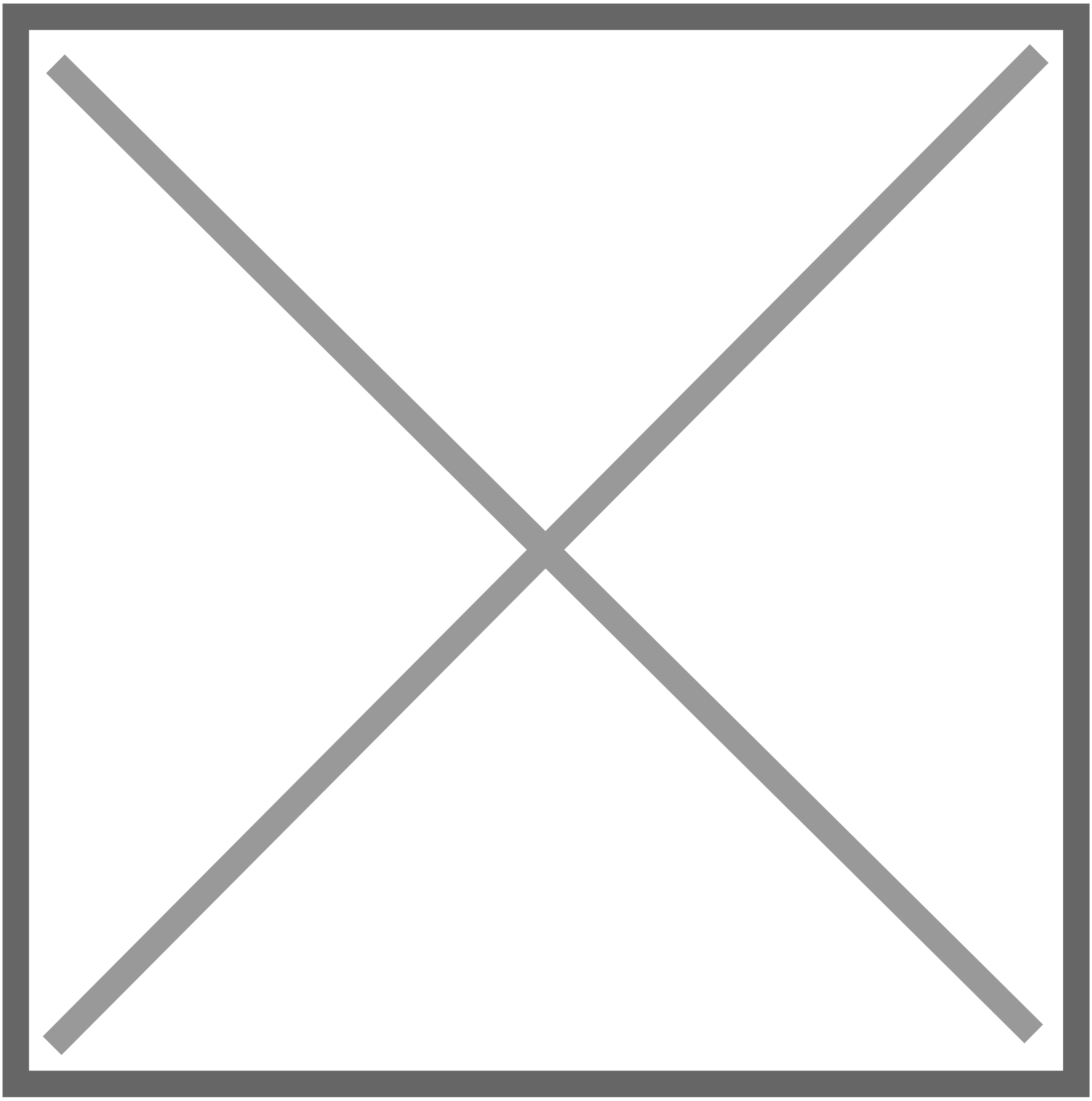
Save button: this will save the contents of the window.

Close button: this will close the window and will not save changes

Print/Export Drop down Menu

Print

Example of a Check Sheet Template Print

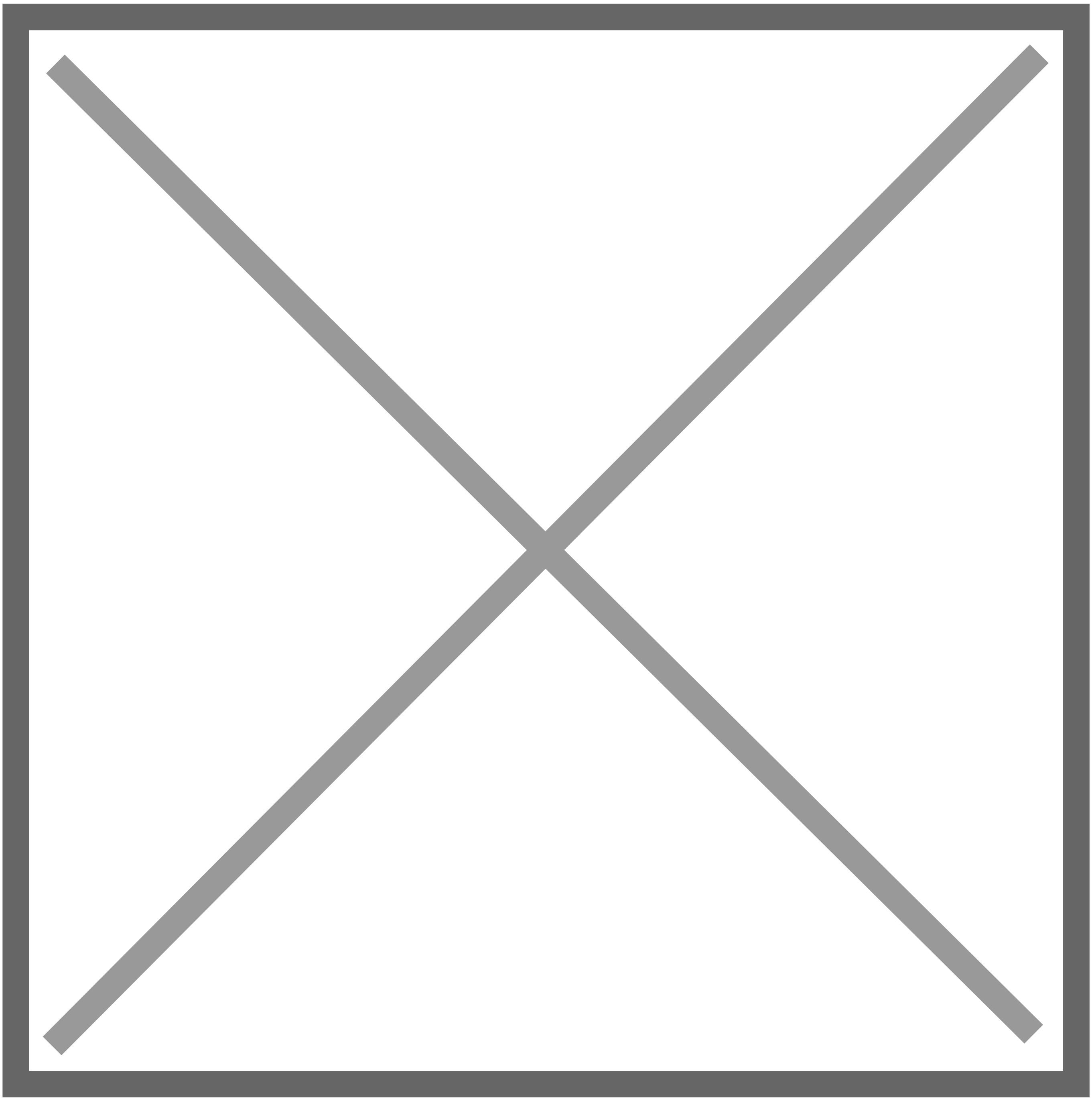


Pre Inspection Check Sheet - JC

JOB Costing Pre Inspection Check Sheet

This manual describes how to create and maintain a Pre Inspection Checksheet.

The Pre Inspection Checksheet is created from the Check Sheet Template



Navigation Ribbon consists of 5 buttons, a drop down menu and three icons

Search button: selects all existing Pre Inspection Checksheets on the system. If no search filter criteria is not specified when searching.

The search results displayed on the display grid will depend on the filter criteria you select.

Add button: to insert a new Pre Inspection Checksheet.

Edit button: to view or edit an already added Pre Inspection Checksheet.

Delete button: to delete the currently selected Pre Inspection Checksheet

Print button: to print the selected Pre Inspection Checksheet.

Process Drop down Menu:

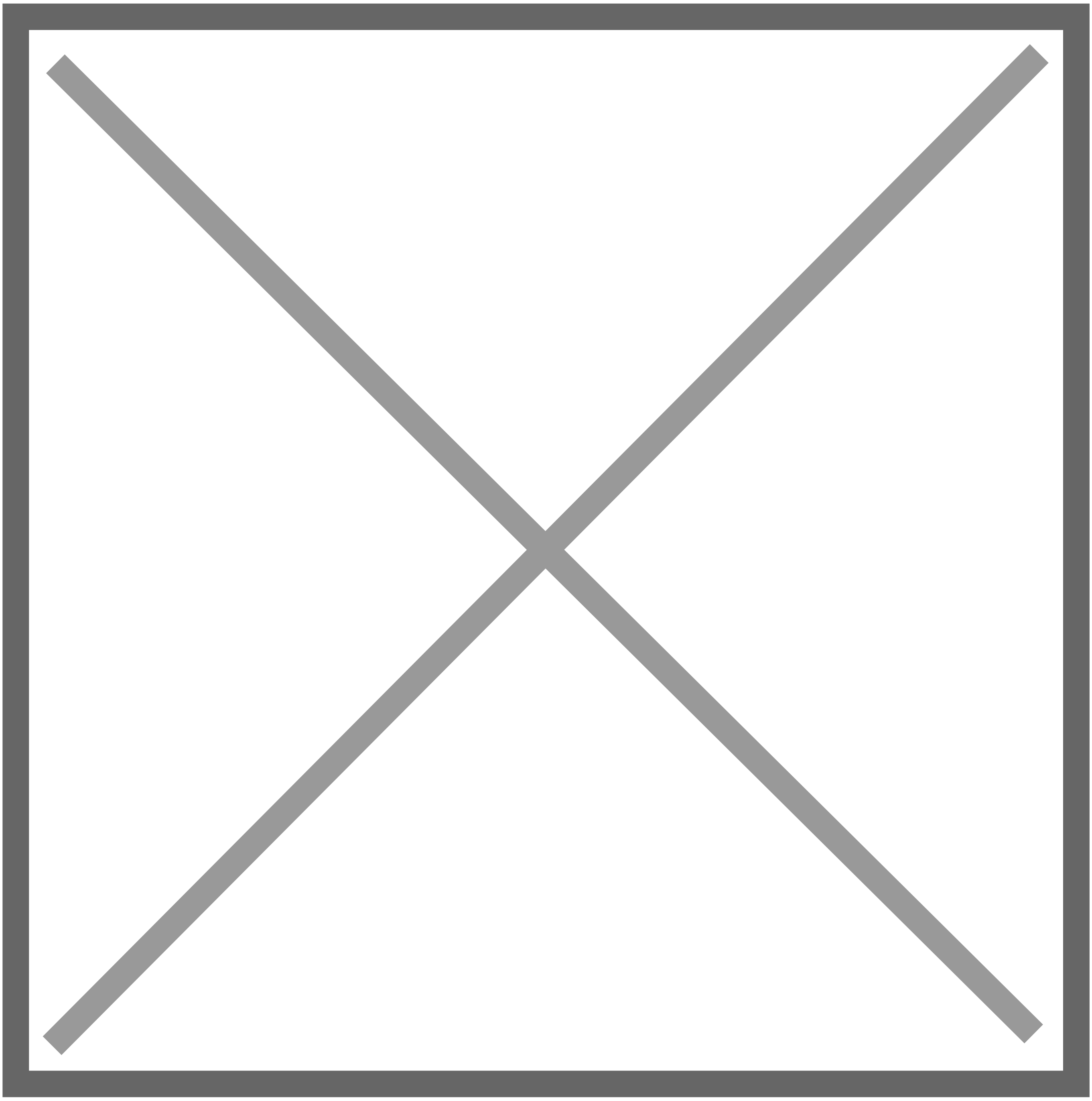
Job Quote:

Debtor Quote:

Security Icon: Manage form security

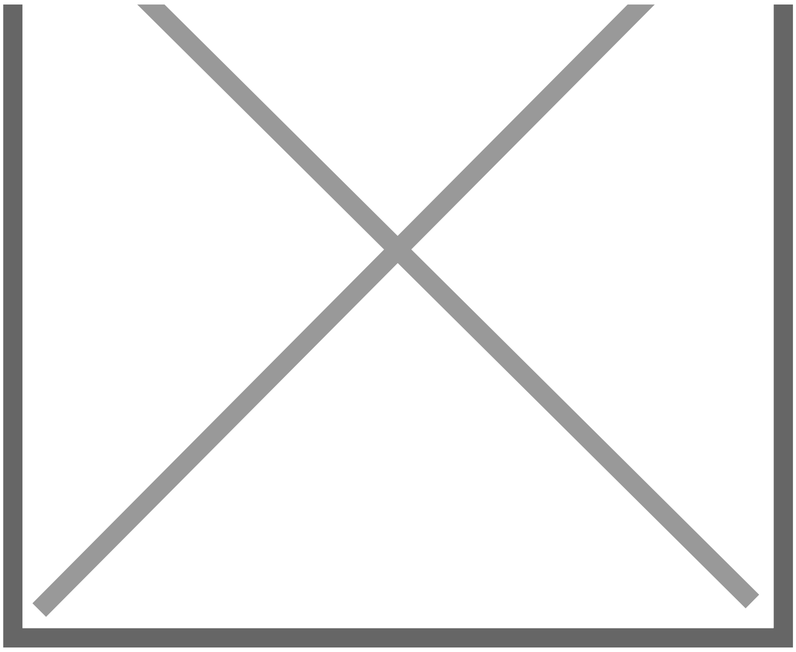
Refresh Grid Icon: Refreshes the display grid

On Line Help Menu Icon: Displays on-line help



Add a new Pre Inspection Checksheet

This function will create a new Pre Inspection Checksheet from the available Check Sheet Templates.



Template: select a Check Sheet Template from the available templates in the drop down list

Description: give your Pre Inspection Checksheet a name

Customer: select the customer from the drop down list

Assign To: select the responsible person for the Pre Inspection Checksheet

Save and Close button: this will save the Pre Inspection Checksheet and return you to the Pre Inspection Checksheet window

Close button: this will return you to the Pre Inspection Checksheet window

Check Sheet Window

Navigation Ribbon has three buttons Add, Edit and Delete

There are four tabs

Standard tab: this tab allows you to link actions to the Pre Inspection Checksheet

Questions tab: this tab allows you to link questions to the Pre Inspection Checksheet

Notes tab: this tab allows you to link notes to the Pre Inspection Checksheet

Custom Fields tab: this tab allows you to use custom fields to the Pre Inspection Checksheet

Standard tab

This tab allows you to link actions to the Pre Inspection Checksheet

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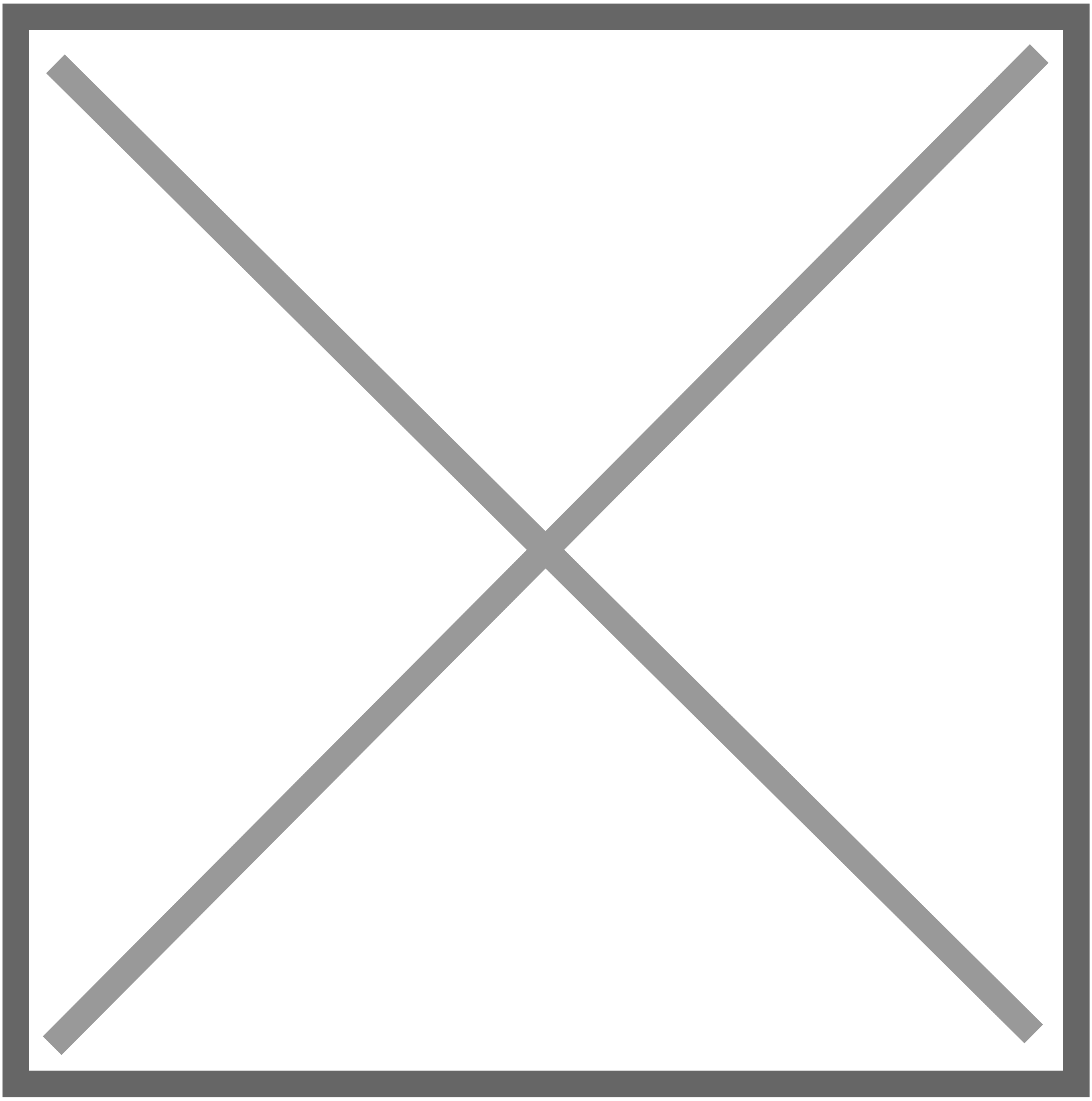
This tab allows you to link actions to the Pre Inspection Checksheet

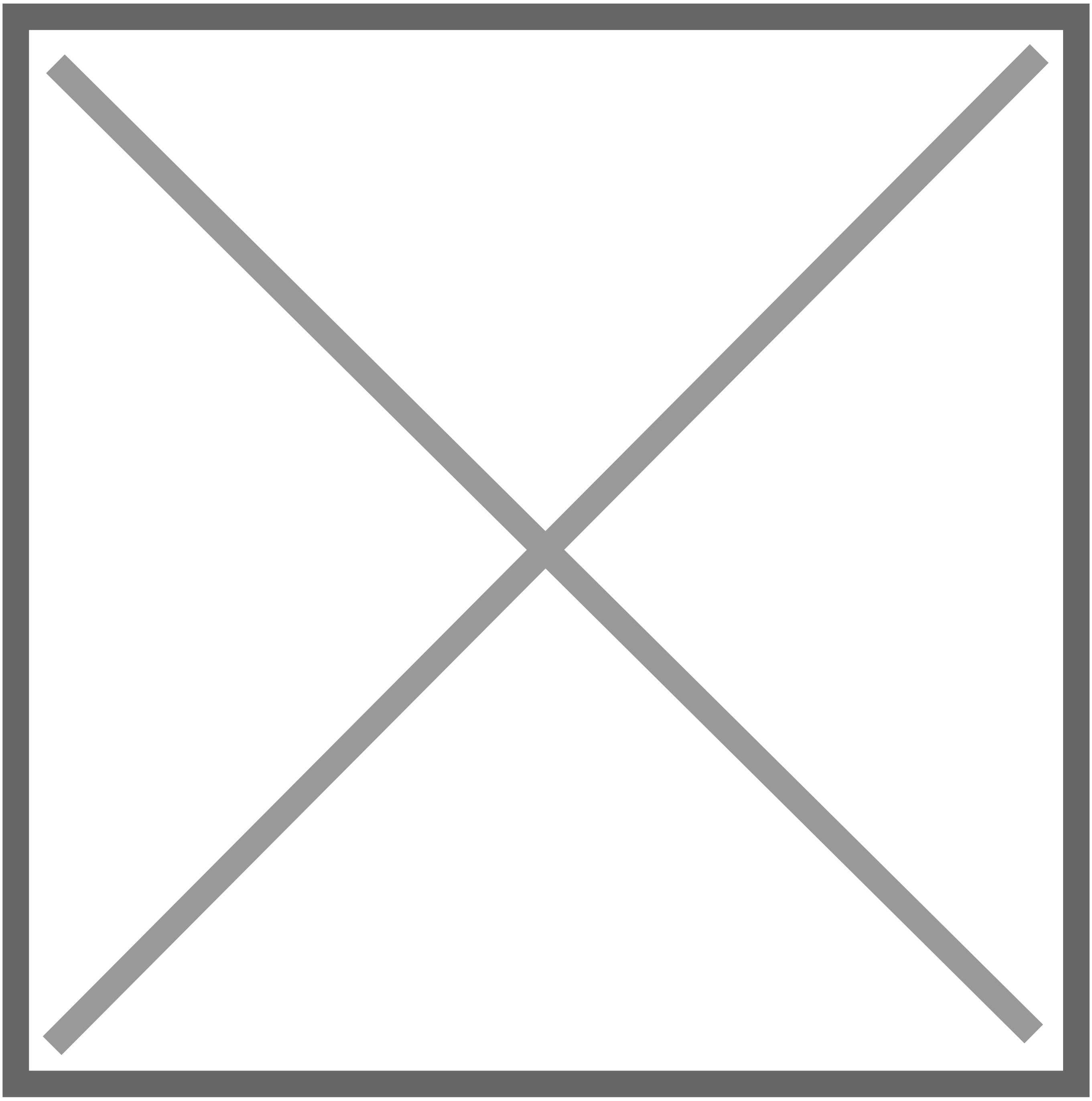


Save button: save contents of form

Close button: closes current form and returns you to the display grid

Questions tab

This tab allows you to link questions to the Pre Inspection Checksheet

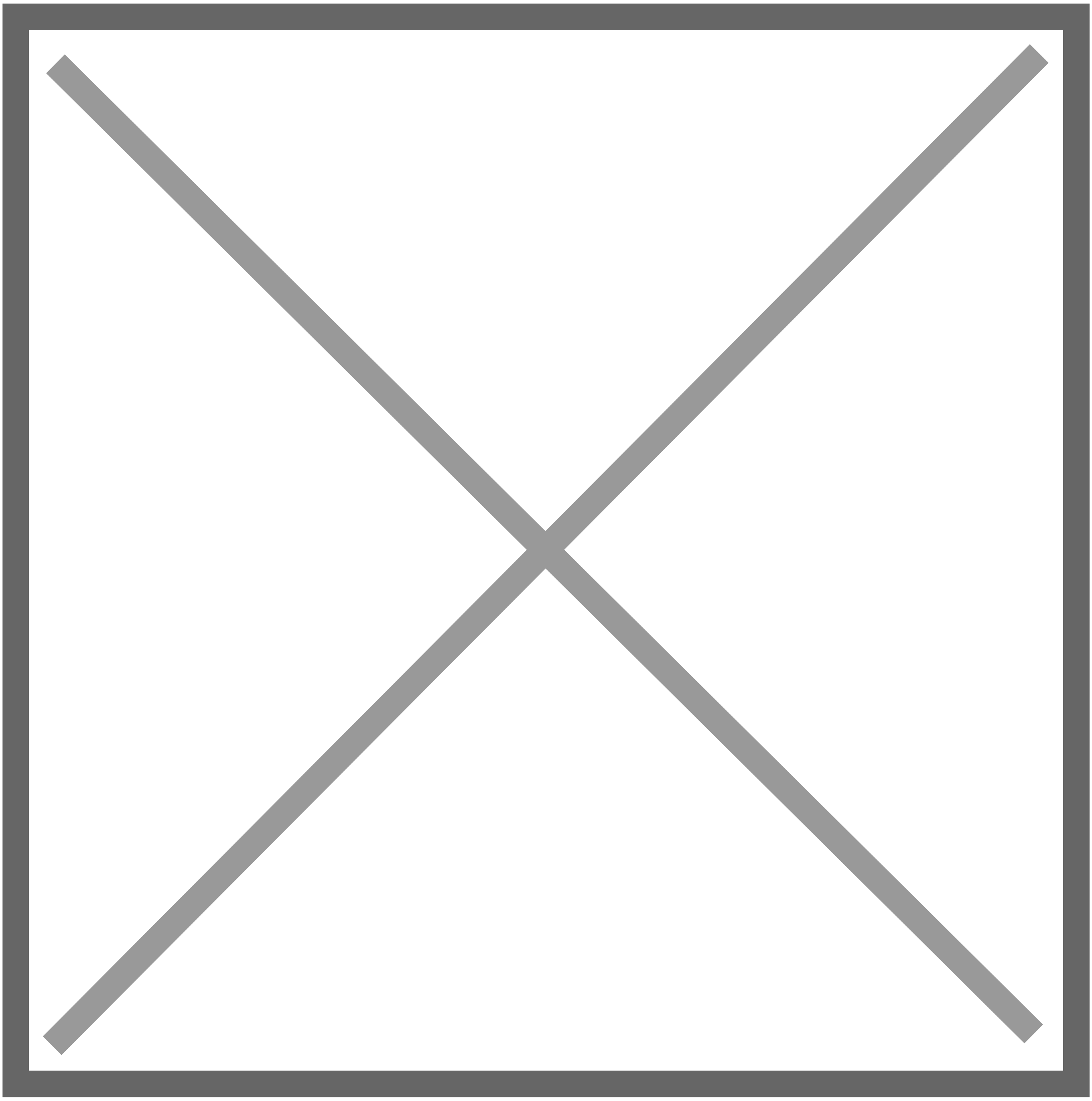


Save button: save contents of form

Close button: closes current form and returns you to the display grid

Notes tab

This tab allows you to link notes to the Pre Inspection Checksheet



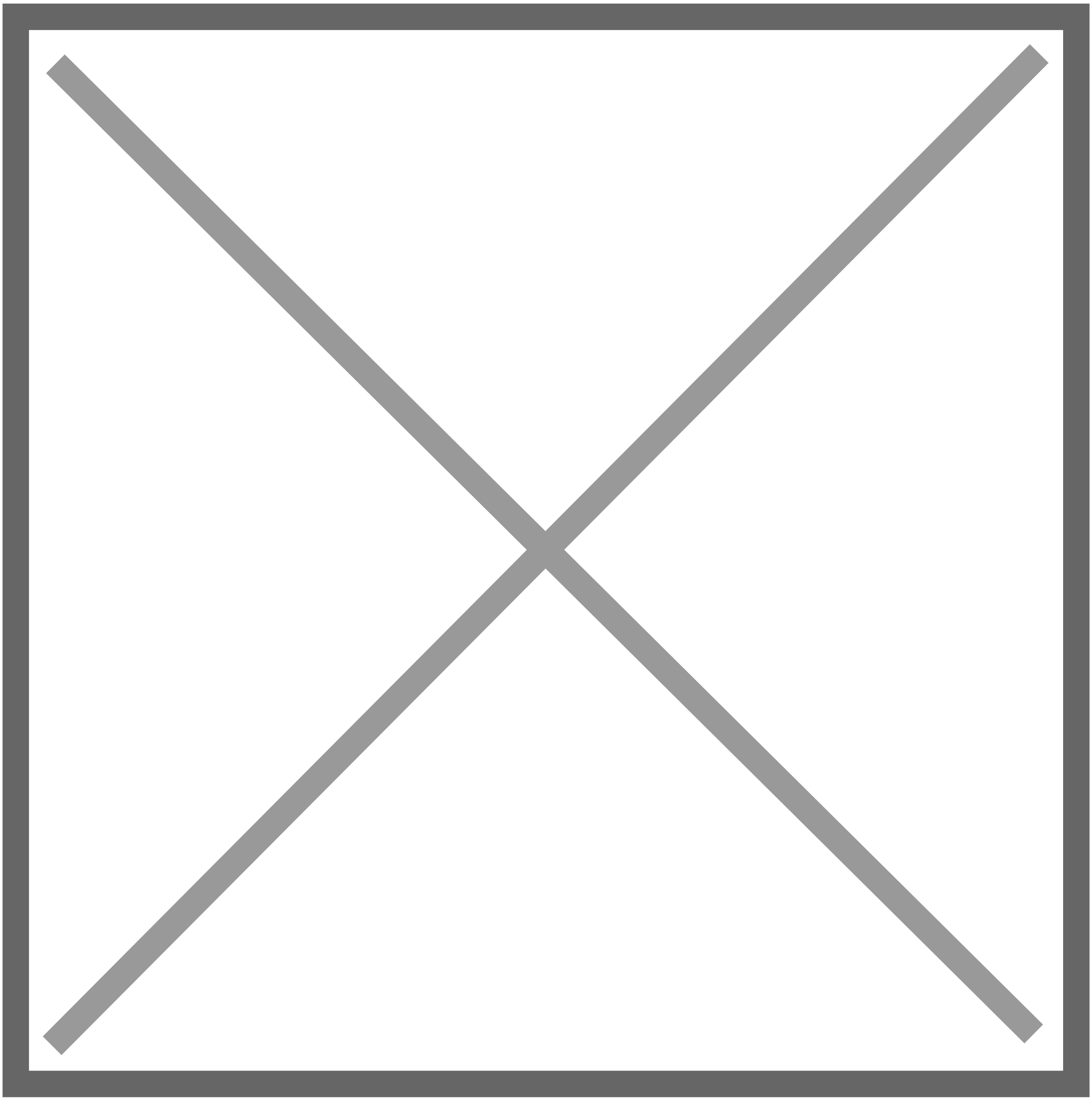
You first need to add a note then save the note

Save button: save contents of form

Close button: closes current form and returns you to the display grid

Custom Fields tab

This tab allows you to use custom fields to the Pre Inspection Checksheet



Save button: save contents of form

Close button: closes current form and returns you to the display grid

Example of the printed Pre Inspection Checksheet