ACR Configuration

Check List Template Setup Menu

Check List Template Setup Menu

Check Sheet Template Setup Search

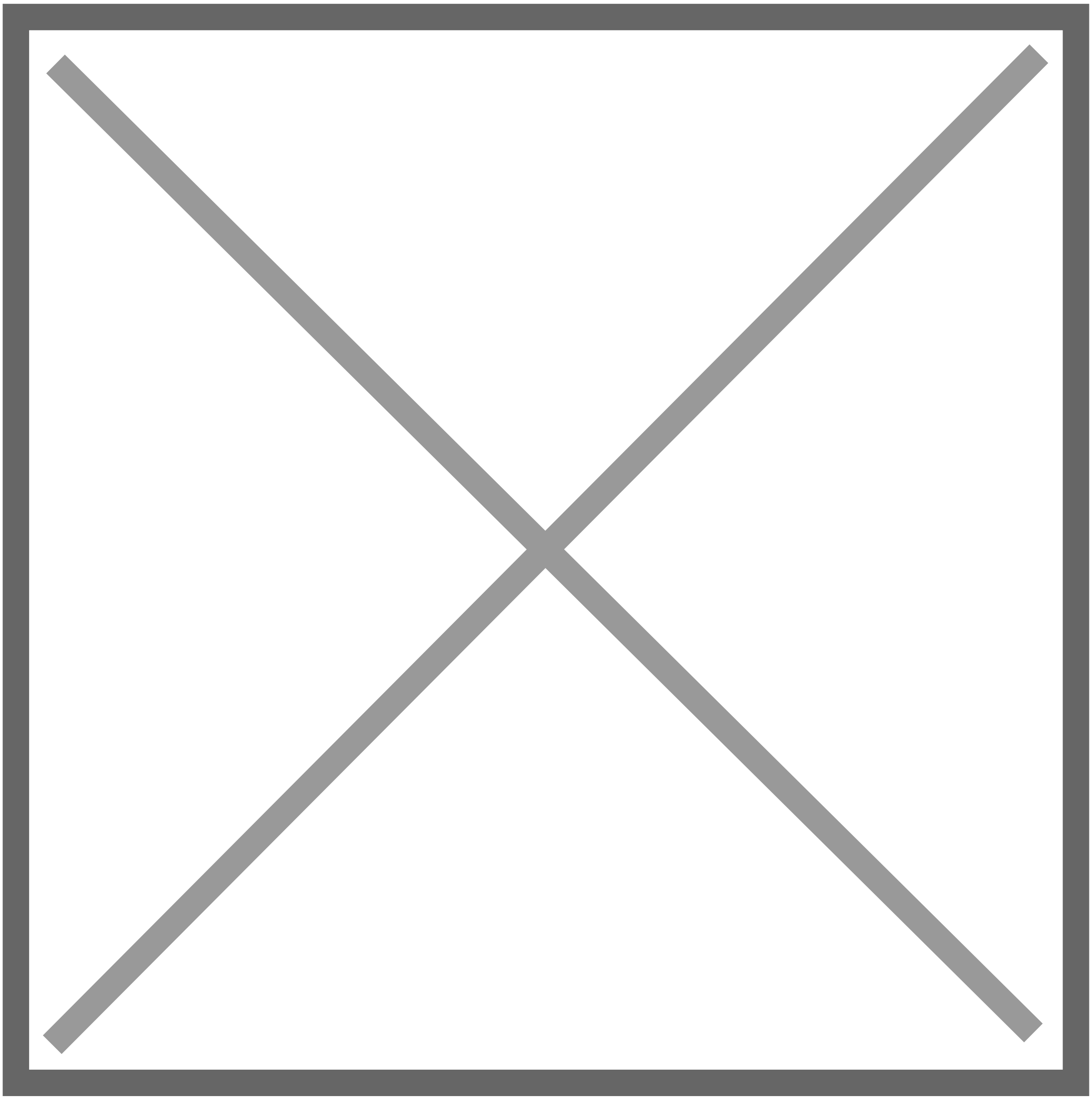
This application allows for the creation of Check Sheets which are used in the Job Costing Module.

Check Sheets are used to ensure that all the predefined steps in a standard job are completed.

Webatar > Configuration > Checklist Template

Video manual 2020 - Click Here

Video manual 2016 - Click Here



The following tasks can be actioned using this window

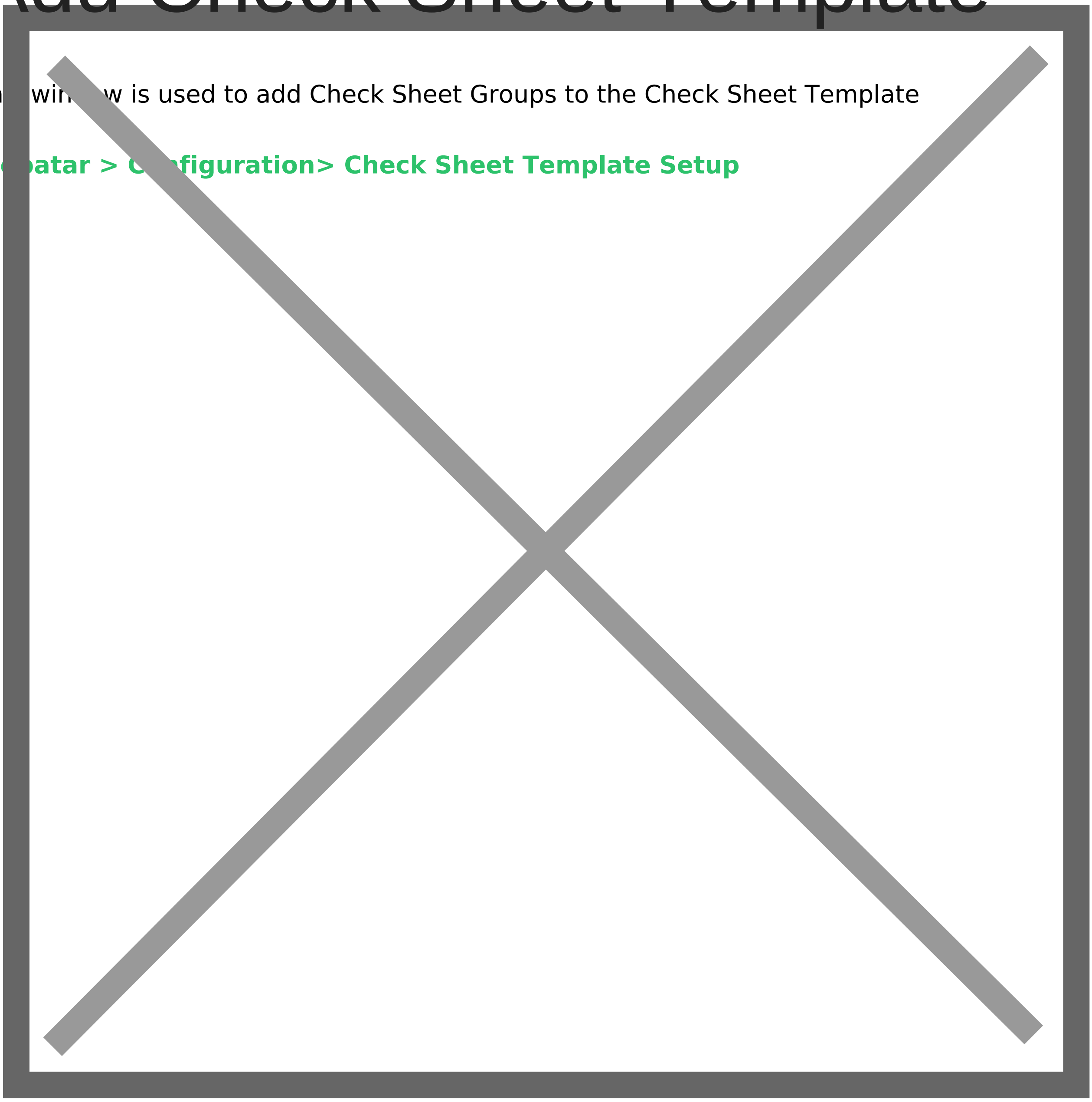
Add	To add new Check Sheets input the new code and description.
Edit	Enter the Code or description to change
Delete	Enter the Code you wish to delete
Clone	You are able to copy the characteristics of an existing Check Sheet Template to a new Check Sheet Template
Print/Export	You are able to print the Check Sheet this can either be emailed or physically printed
Active	If this check box is ticked then the search will return all Active Check Sheets. If not ticked then the search will return all inactive Check Sheets.

Check List Template Setup Menu

Add Check Sheet Template

This window is used to add Check Sheet Groups to the Check Sheet Template

Webatar > Configuration> Check Sheet Template Setup



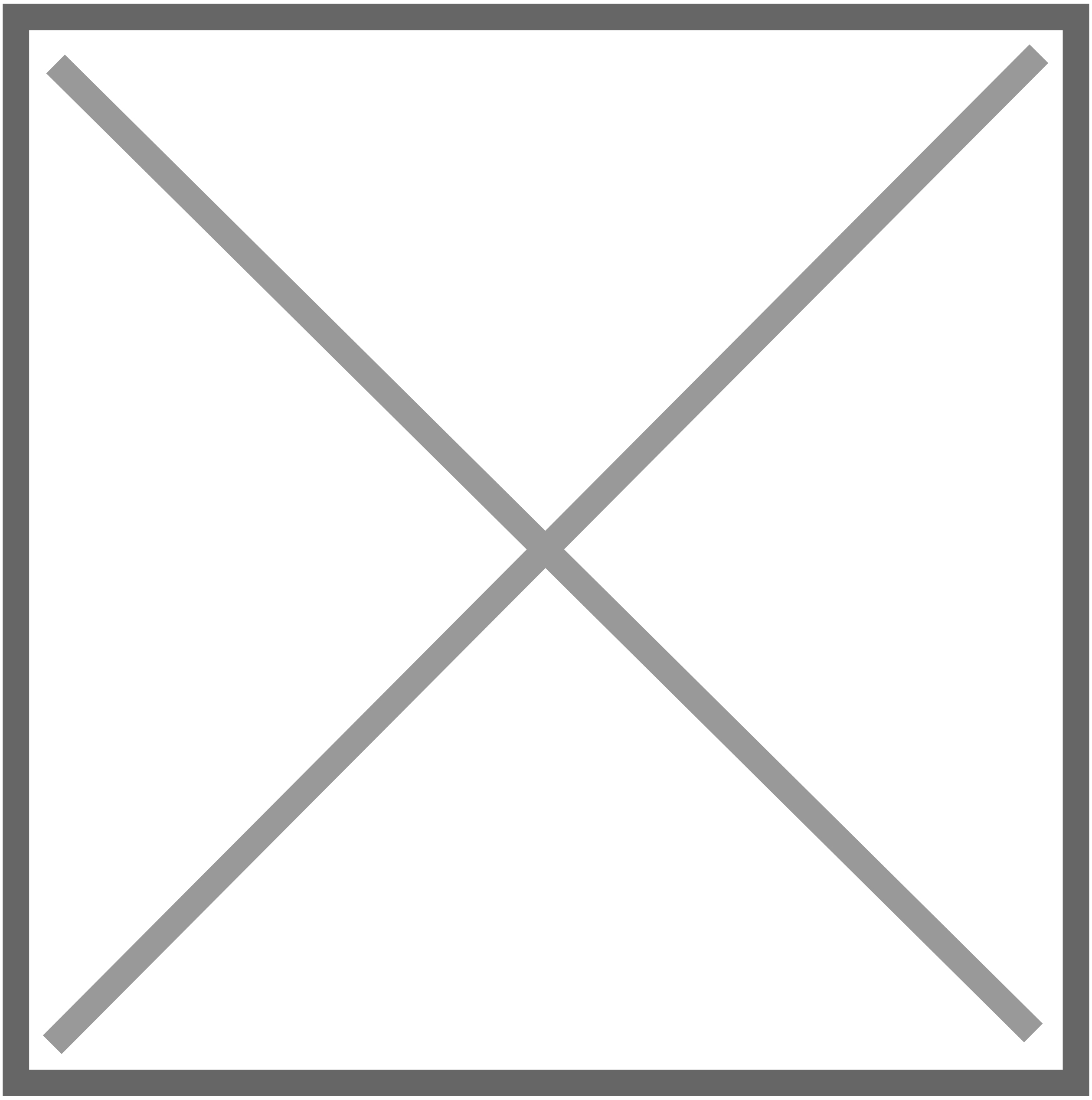
Standard	Use to add, edit or delete a Check Sheet Group within the Check Sheet template

Buttons

Add Button	Insert a new Check Sheet Group
Edit Button	View/Edit a Check Sheet Group
Delete Button	Delete a Check Sheet Group
Print/Export Drop Down Menu	Print the grid displayed win the window

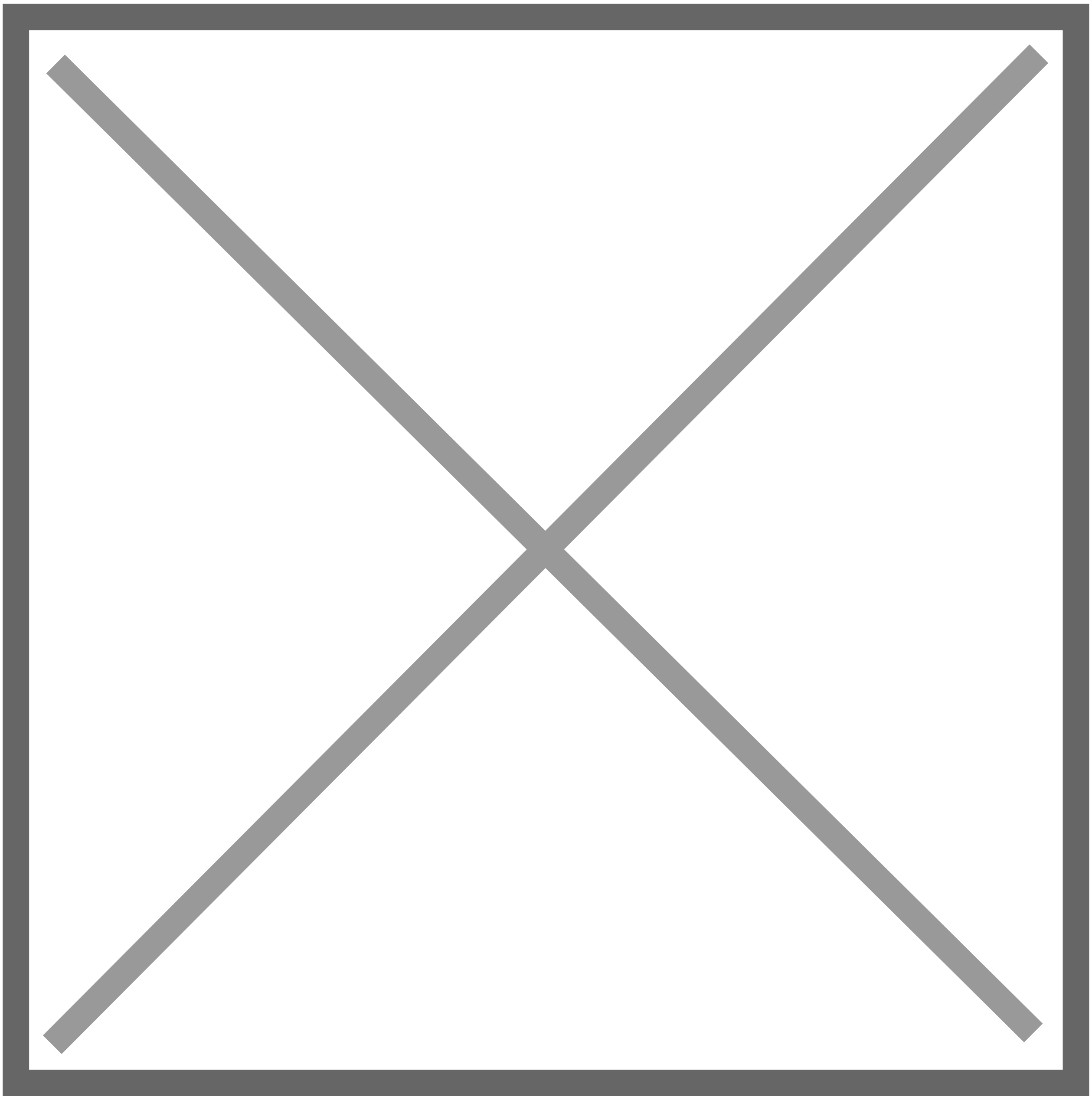
Overview button

Displays the list of created check sheet groups, tasks and questions



Print Button

Allows the user to print the selected Check list template



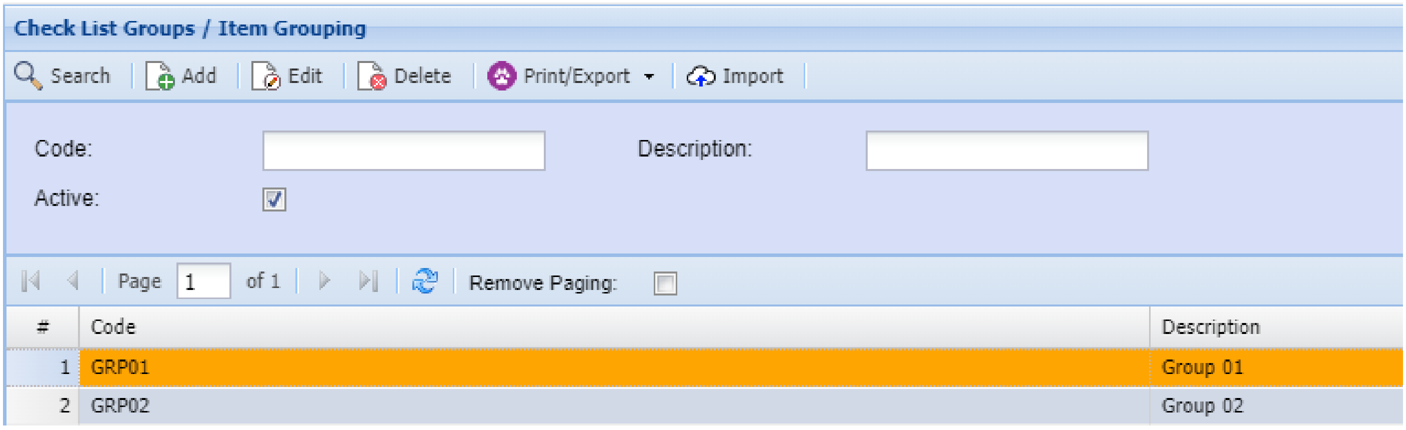
Check Lists Groups Menu

Check Lists Groups Menu

Check List Groups

Check sheet groups are the logical grouping of activities that are used in the Check Sheet Template to create a Check Sheet

CRM Module> Configuration> Check List Groups



Code	Search for a check list/ Item grouping using the list code or part of it
Description	Search for check list group by description or part of description
Active	If you search for check list with the tick on. I will recall all existing check list groups If you search for check list group with the tick off it will recall all inactive check list groups

Button

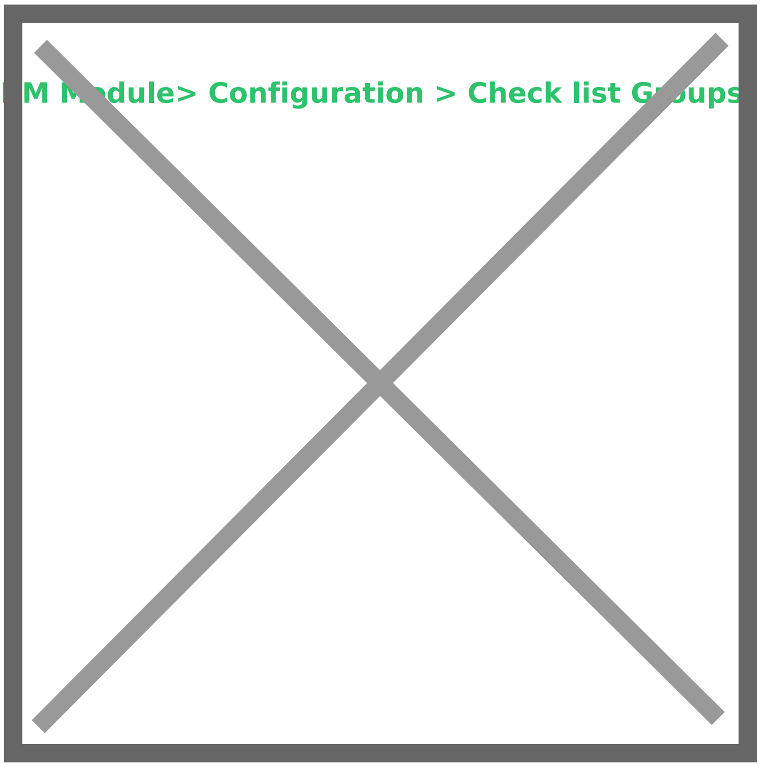
Search	Allows you to search for one or multiple check list
Add	Allows you to create a new check list group
Edit	To edit or view an existing check sheet
Delete	Allows you to delete an existing Check sheet
Print/ Export	Allows you to print or export check sheets displayed on the Grid

Import	Allows you to bring in check sheets via a template into the system

Check Lists Groups Menu

Add Check List

CRM Module> Configuration > Check list Groups



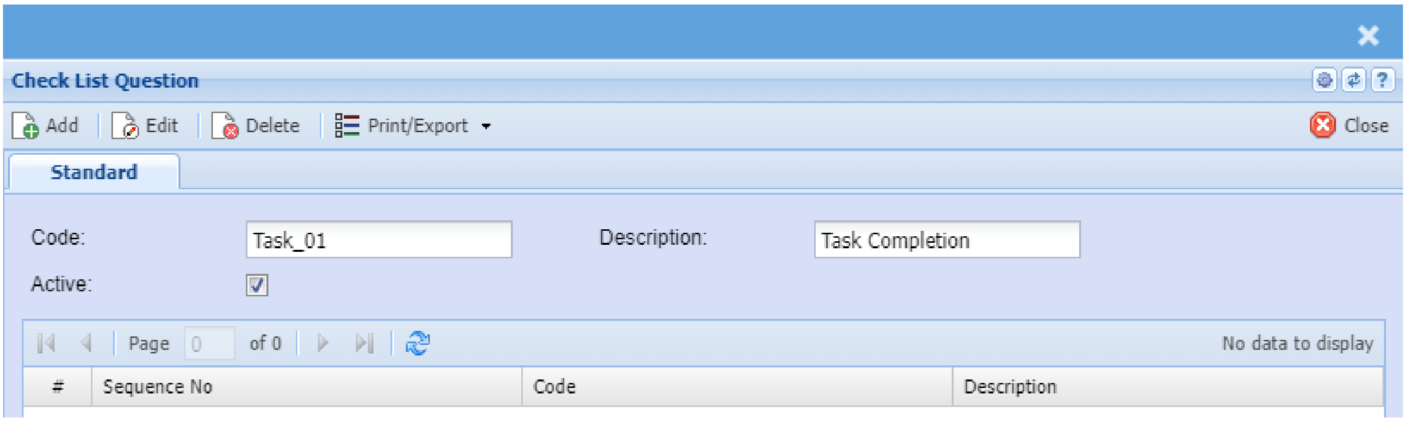
Code	Enter the check list group code
Description	Enter the check list group description
Active	Tick the active tickbox if the check list group is active Do not tick the tick box if the check list group is inactive

Check List Questions Menu

Check list Questions

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.

Webatar > Configuration > Check List Questions



Code	Add the code for the check list question
Description	Enter the description for check list of question
Active	Put a tick on if the check list question is active and do not put on a tick if the check list question is inactive

Interactions Types Menu

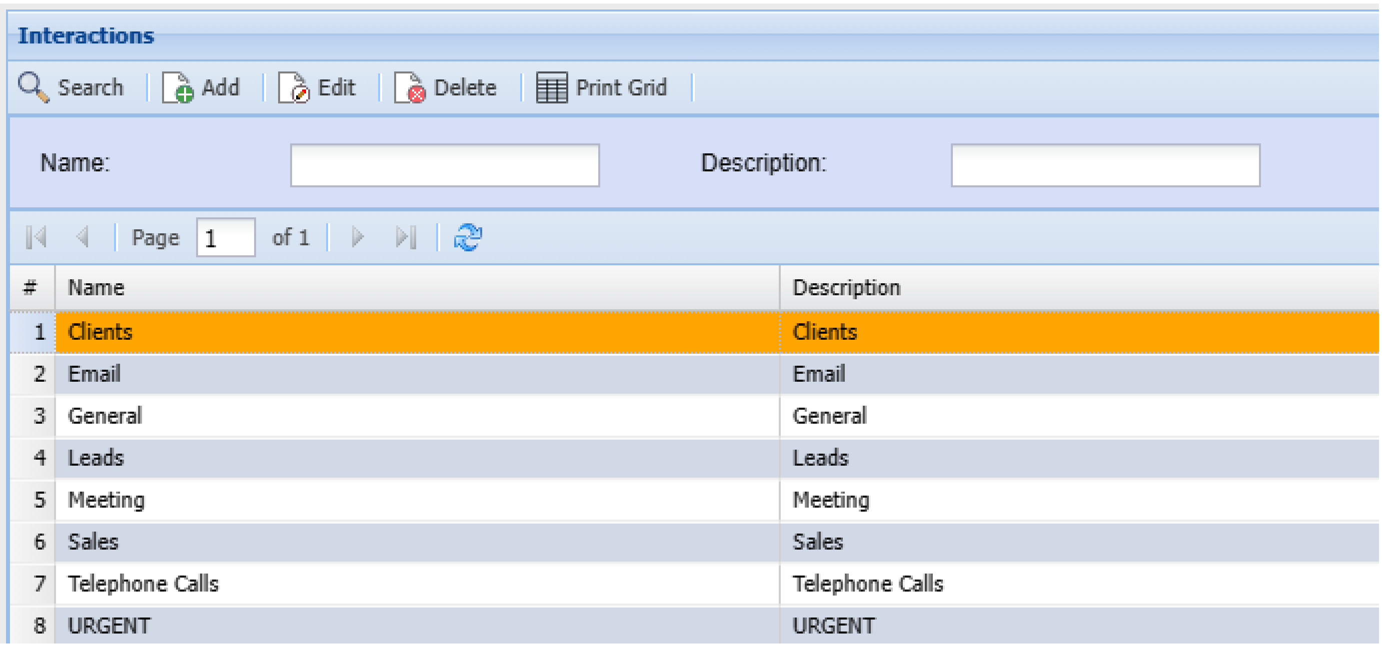
Interactions Types Menu

Interactions Types Search

Video Training Manual 2016 - [Click Here]

This is where you search for an existing interaction type.

Webatar > Configurations > Interaction Types



Name	Search by interaction name
Description	Search by interaction description

Add Interactions Types

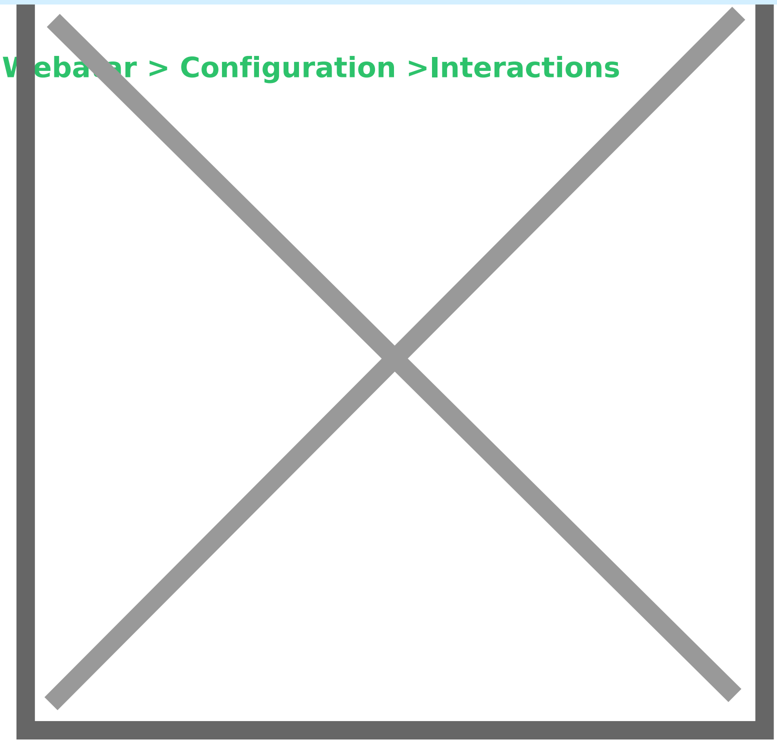
Video Training Manual 2016 - [Click Here]

This is used to make notes of different types of customer interactions for example business meetings, telephone calls and support calls, etc.

You can add new or edit an existing interaction type here

> The change in position of the interaction type from System Configuration to Webatar module

Webatar > Configuration >Interactions



Name	Enter interactions name
Description	Enter interaction description

Website Support Groups Menu

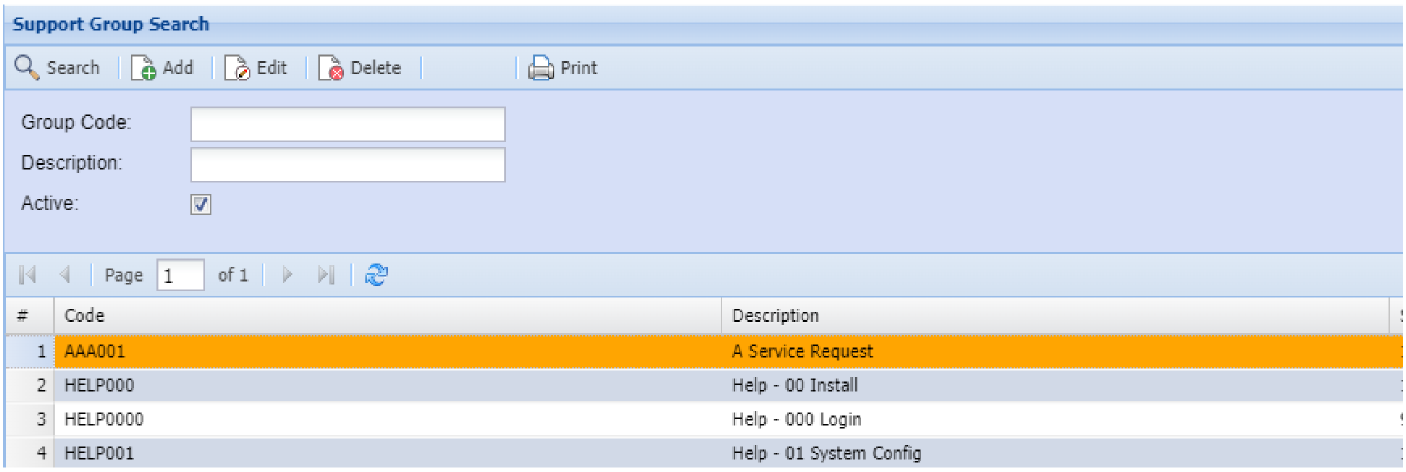
Website Support Groups Menu

Website Support Groups

This is where the user creates a new Website Support Groups or search for an existing one.

CRM Module> Configuration> Website Support Groups.

> If no filter options are selected all Website Support Groups records are displayed on the gird.

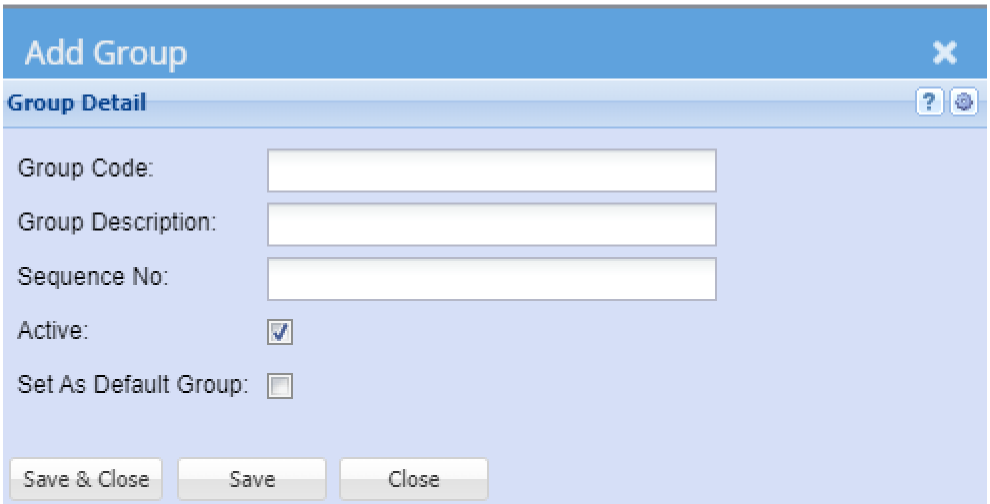


Group Code	
Description	
Active	Searching for Active or Inactive Website Support Groups
Search	Search button allows a user to search using filter options.
Add	to create a new Website Support Group.
Edit	to make changes to an existing Website Support Group.
Delete	to delete an existing Website Support Group.
Print	print all the Website Support Group display on the gird

Add Website Support Groups

This is where the user adds or edits a Website Support Group.

CRM Module> Configuration> Website Support Groups> Add/ Edit Button



Group Code	Enter Group Code
Group Description	Enter Group Description
Sequence No	Enter Sequence number of Group Detail
Active	Searching for Active or Inactive Website Support Groups
Set as Default Group	

Website Support Forms Menu

Website Support Forms Menu

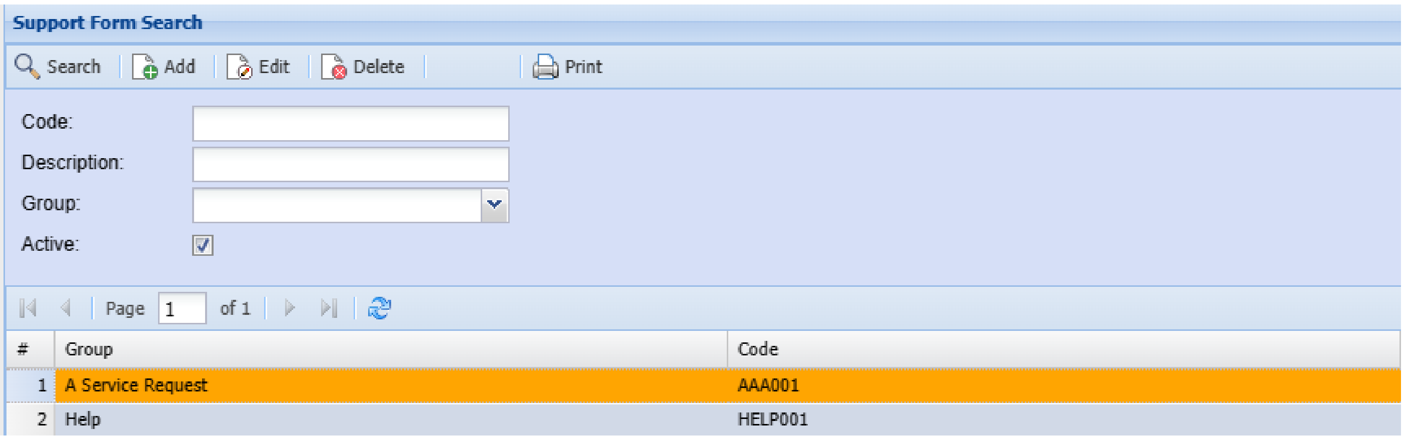
Support Form Search

This is where the user creates a new Website Support Form or search for an existing one.

> If you don't put anything on the search criteria, all support forms will appear

Webatar > Configuration > Website Support Forms

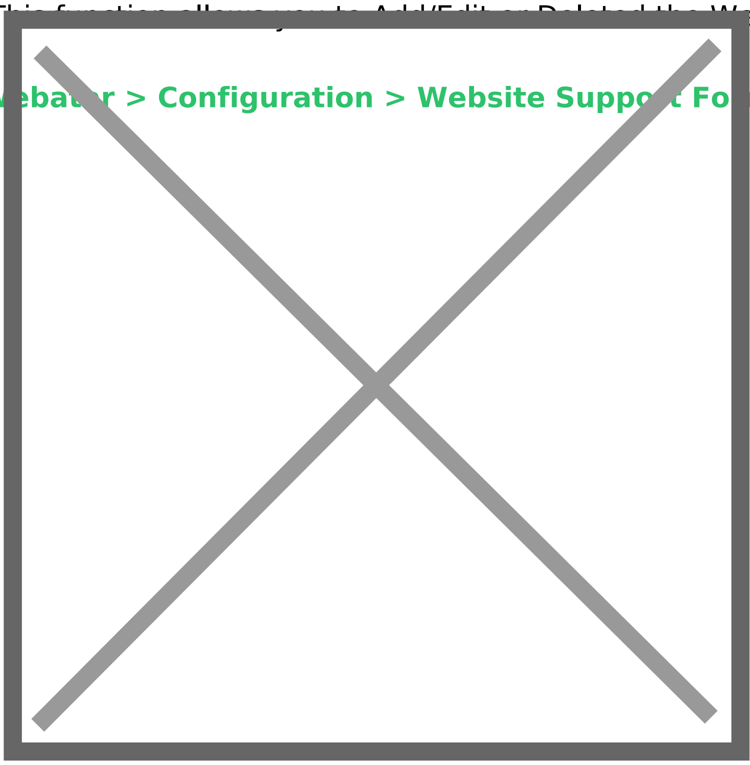
Video training manual - [Click Here]



Code	Search by code name or parts of the code if you know the code you are searching for
Description	Search by description/ name or park of the description of the support form if you know it
Group	Search by group
Active	Searching for Active or Inactive Support Forms

Add Website Support Forms

This function allows you to Add/Edit or Deleted the Website Support Form



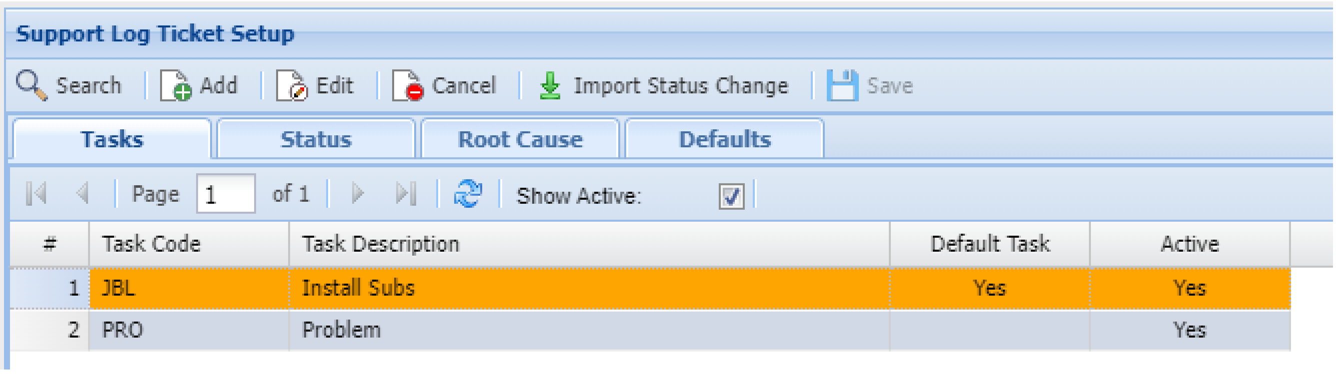
Webauthor > Configuration > Website Support Forms

Code	Enter Website Support Form Code
Description	Enter Website Support Form Code description
Sequence No	Enter in which order the code is to appear
Group	Select from drop down to which Website Support Group you want to associate this Support Form to
Attachment	You are able to attach a document or picture to the Support Form
Active	Searching for Active or Inactive Support Forms

Support Log Ticket Setup Menu

Support Log Ticket Setup

CRM Module > Configuration > Support Log ticket Setup

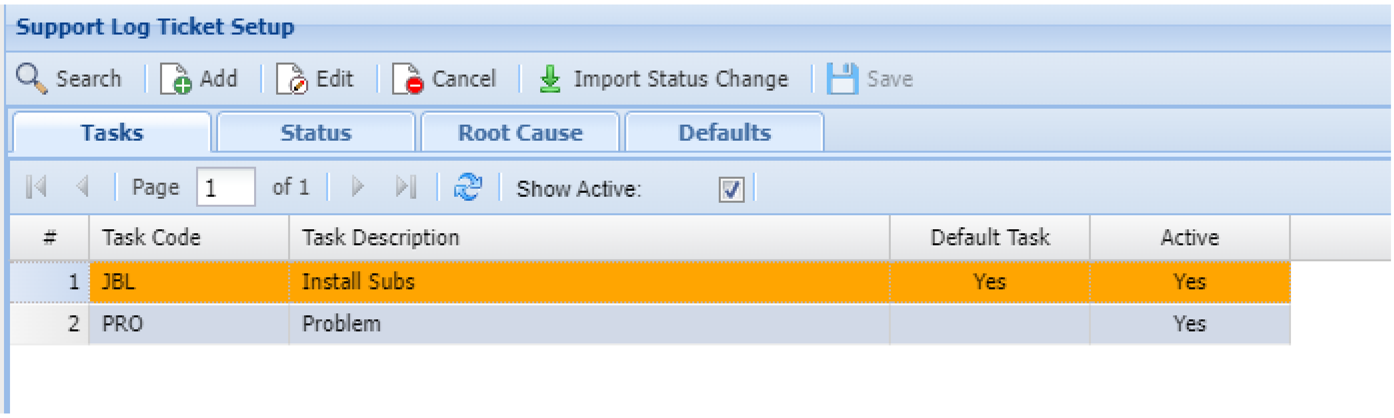


Search	Search the available list of created items
Add	Click Add to add a new support log ticket function
Edit	Click edit to amend the support log ticket item
Cancel	
Import Status Changes	This import facility allows you to change the Status of a Support Log using importing status changes via a CSV file.

Add Support Log Task

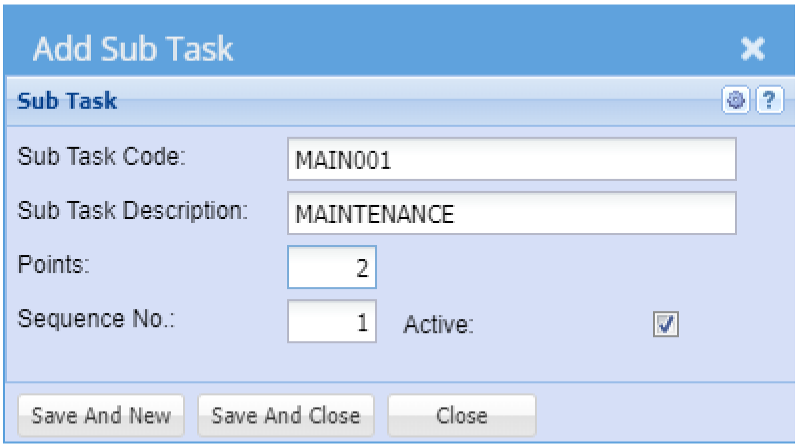
To edit or add a new support log task follow this path

CRM Module >Configuration >Support log Setup



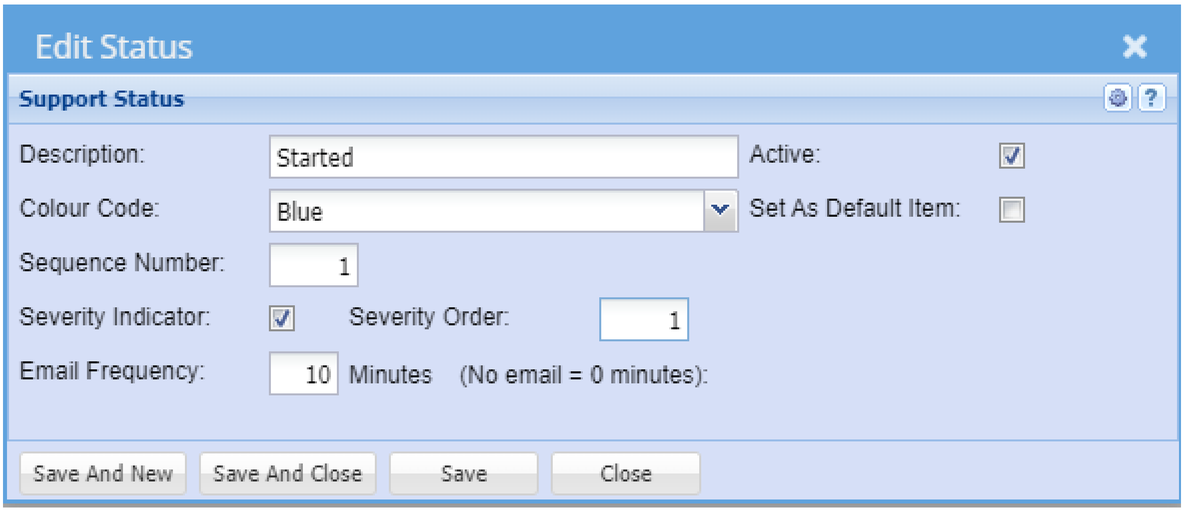
Tasks	
Status	
Root Cause	
Defaults	

Add Sub Task



Sub Task Code	Enter a Sub Task Code
Sub Task Description	Enter a Sub Task Description
Points	
Sequence No	
Active	

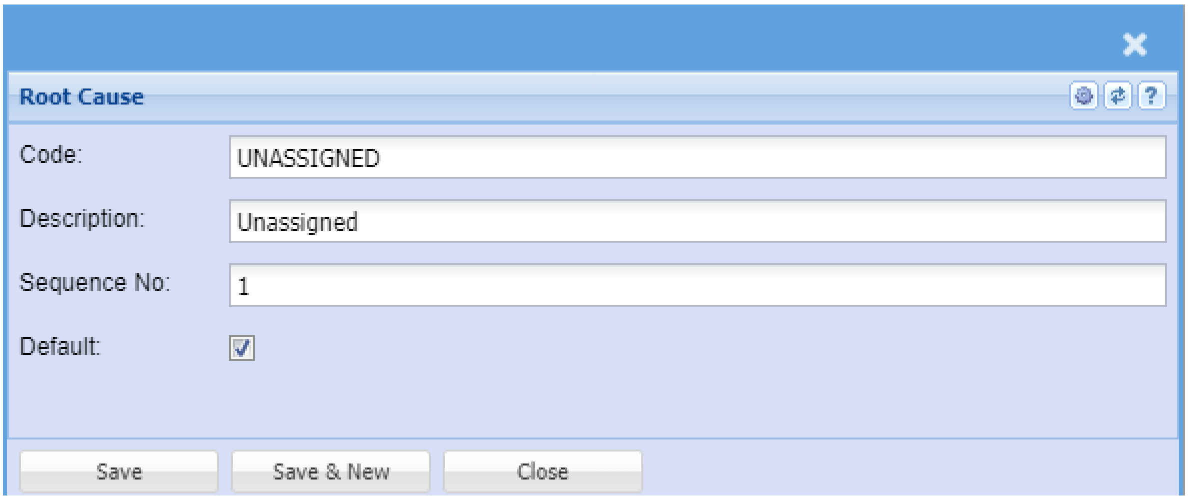
Status



Description	
Colour Code	
Sequence Number	

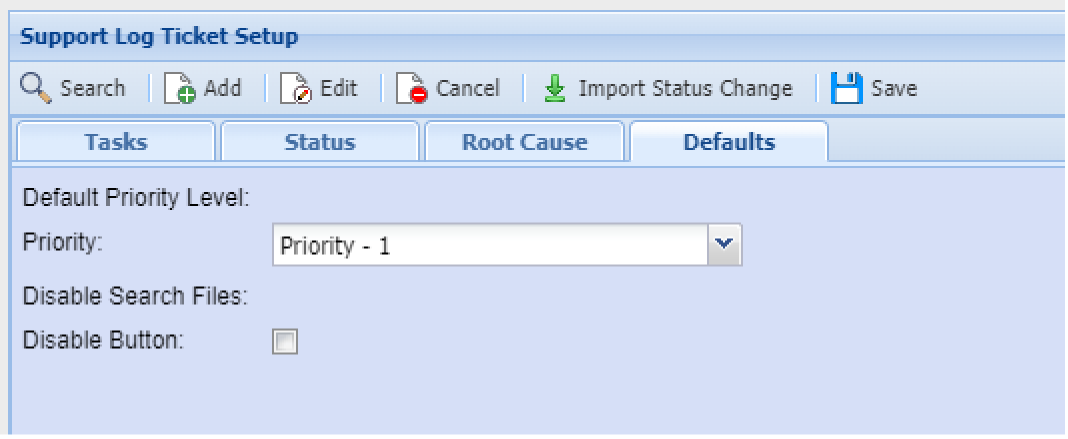
Severity Indicator	
Email Frequency	
Severity Order	
Active	
Set As Default Item	

Root Cause



Code	
Description	
Sequence No	
Default	

Defaults



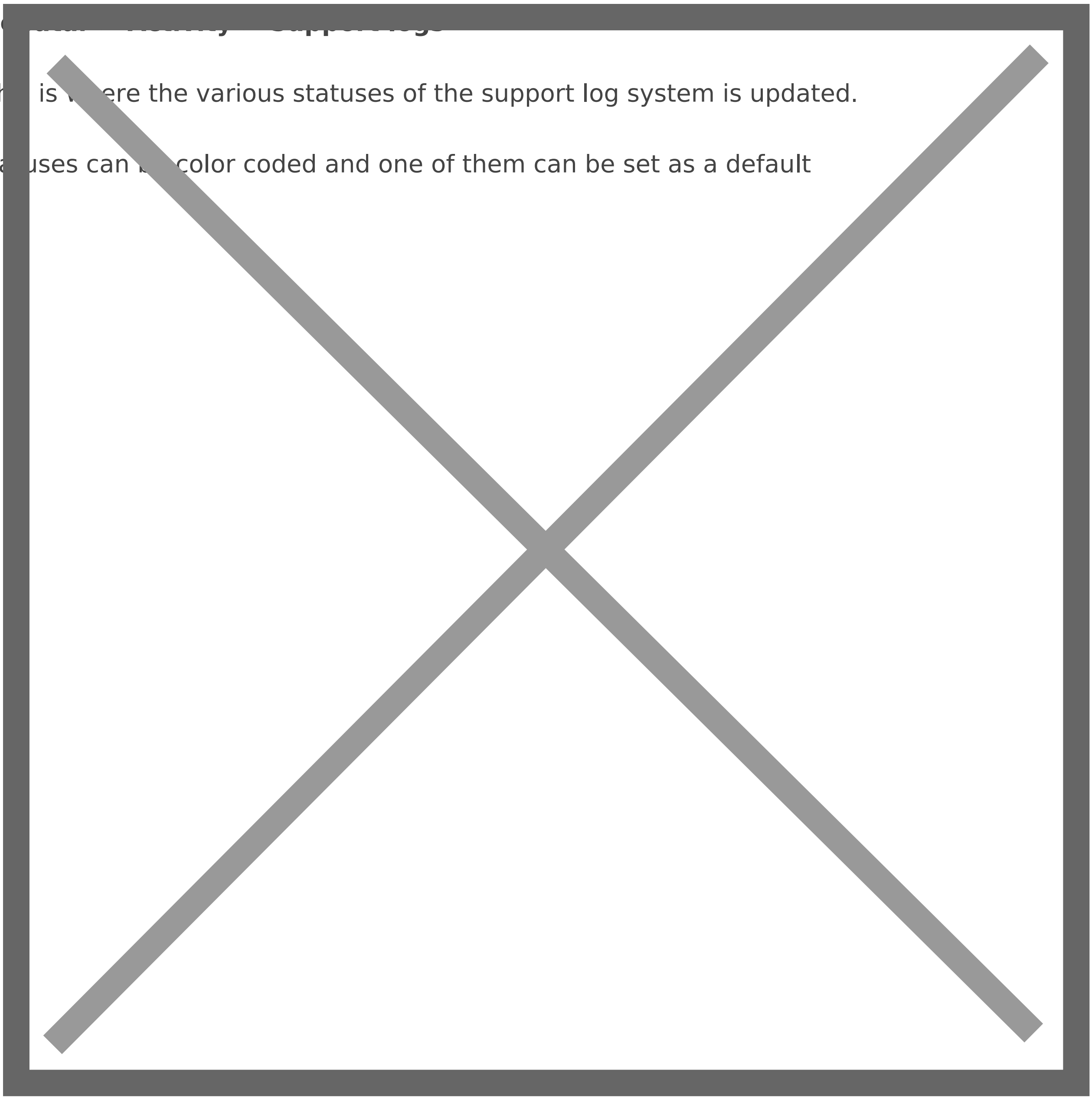
Priority	
Disable Button	

Support Log Status

We[illegible] → Activity → Supportlogs

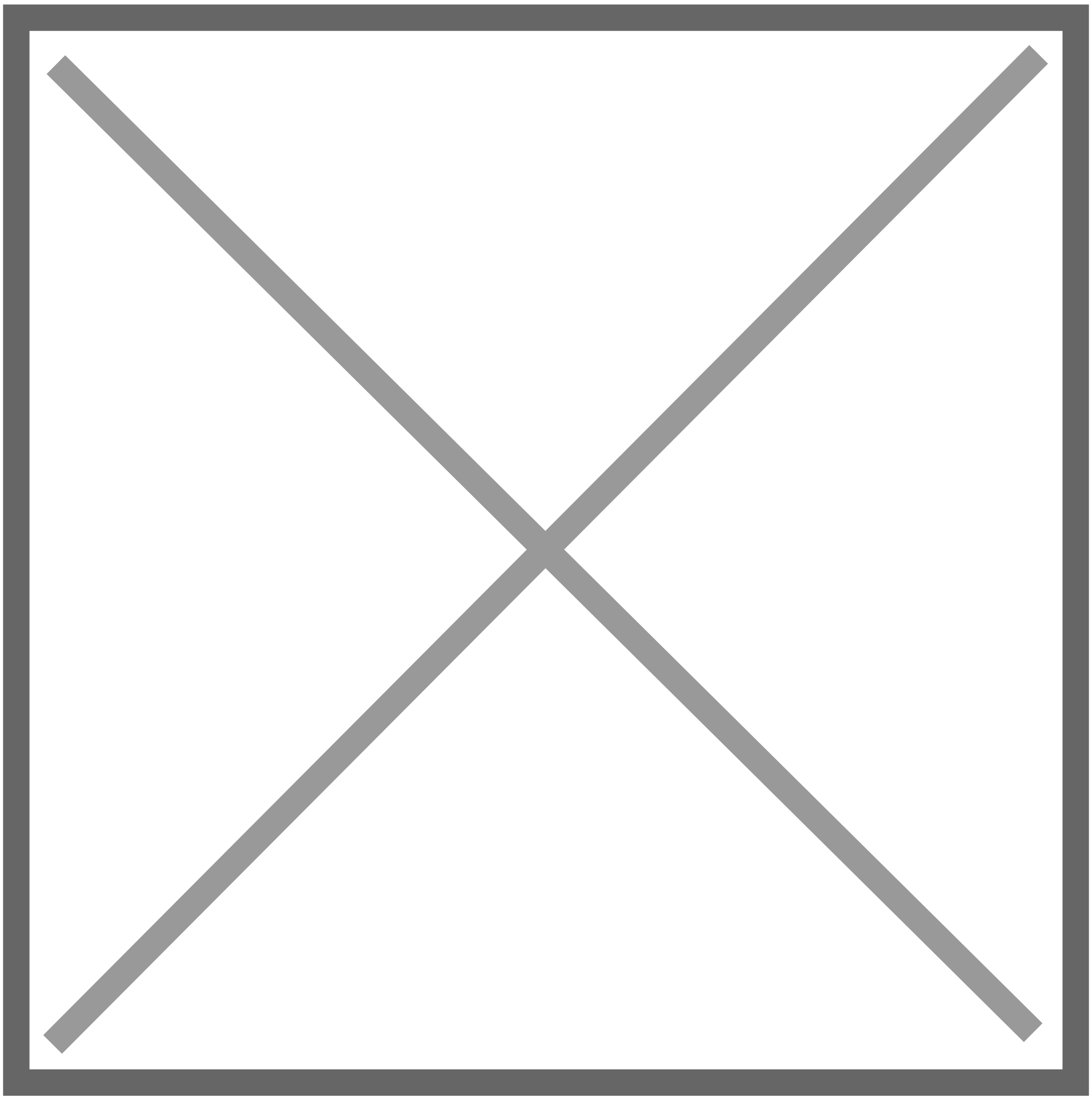
This is where the various statuses of the support log system is updated.

Statuses can be color coded and one of them can be set as a default



Status sections can be deactivated should you have historical statuses.

The description can be changed to your company needs



First Section

The Support status is split into two sections

First section has got to do with the actual status on the support logs

Description

Description of the type of Status you want shown

Active

This is to indicate that this status is active and will show on the drop down of the menus.

Take the tick off to deactive this status from the selection lists, but keeping the history of the support logs already shown.

Colour code

Colour indicate the font colour on the support log ticket grid for easier reading

Set As Default Item

There can only be one Default item in this list.

If the user wants another status to become a default status, then he would first have to unselect the default status from the other status item and then go back to the status item to select.

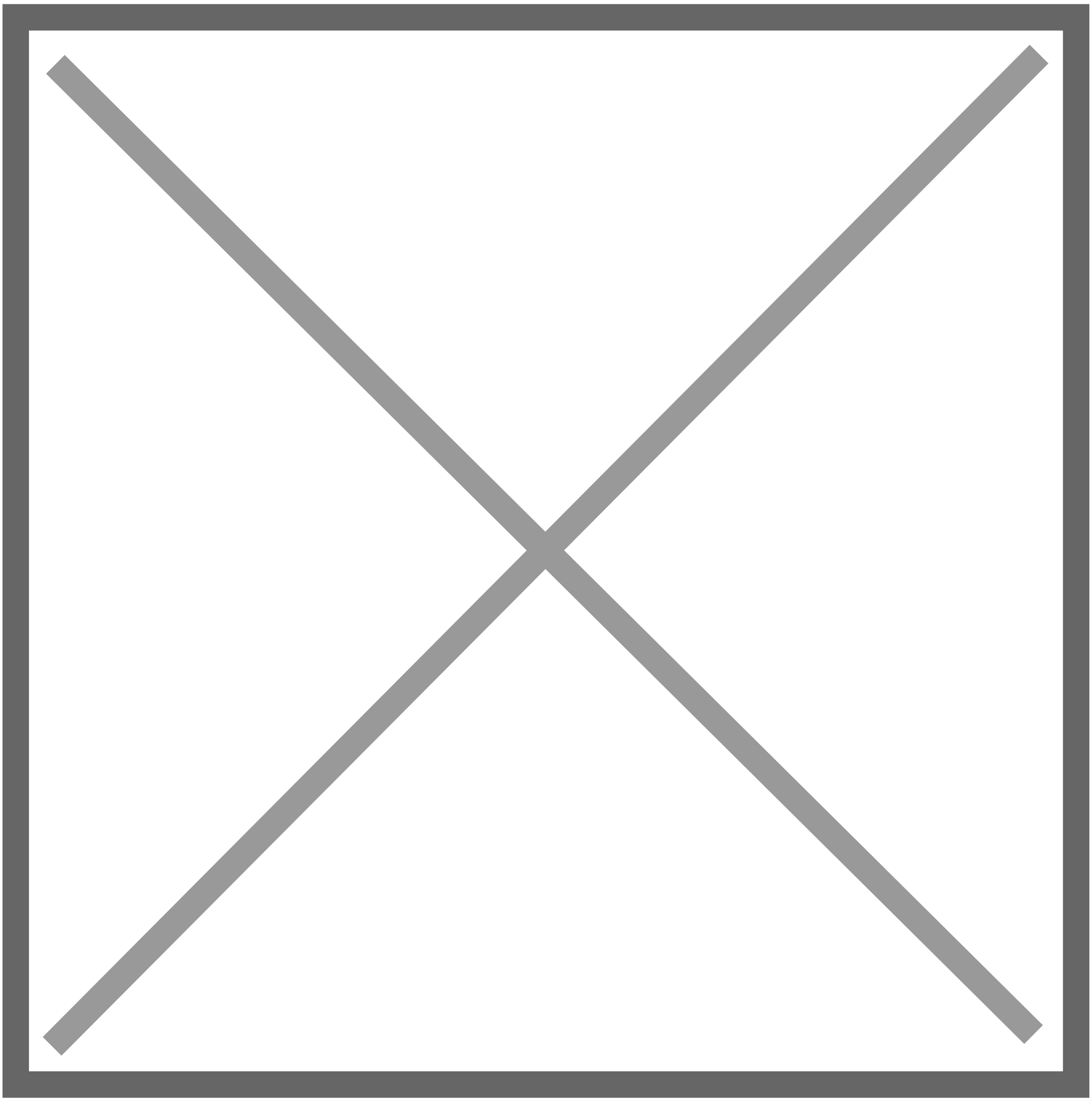
This is why the Set As Default Item is inactive when there is another status already active.

Sequence Number

This sequence is used in the workflow flow of the various statuses.

Second section

The green part of the status setup is reserved for the support log logging.



Severity Indicator

Active this tick box in order for the severity status to be shown up on the support request

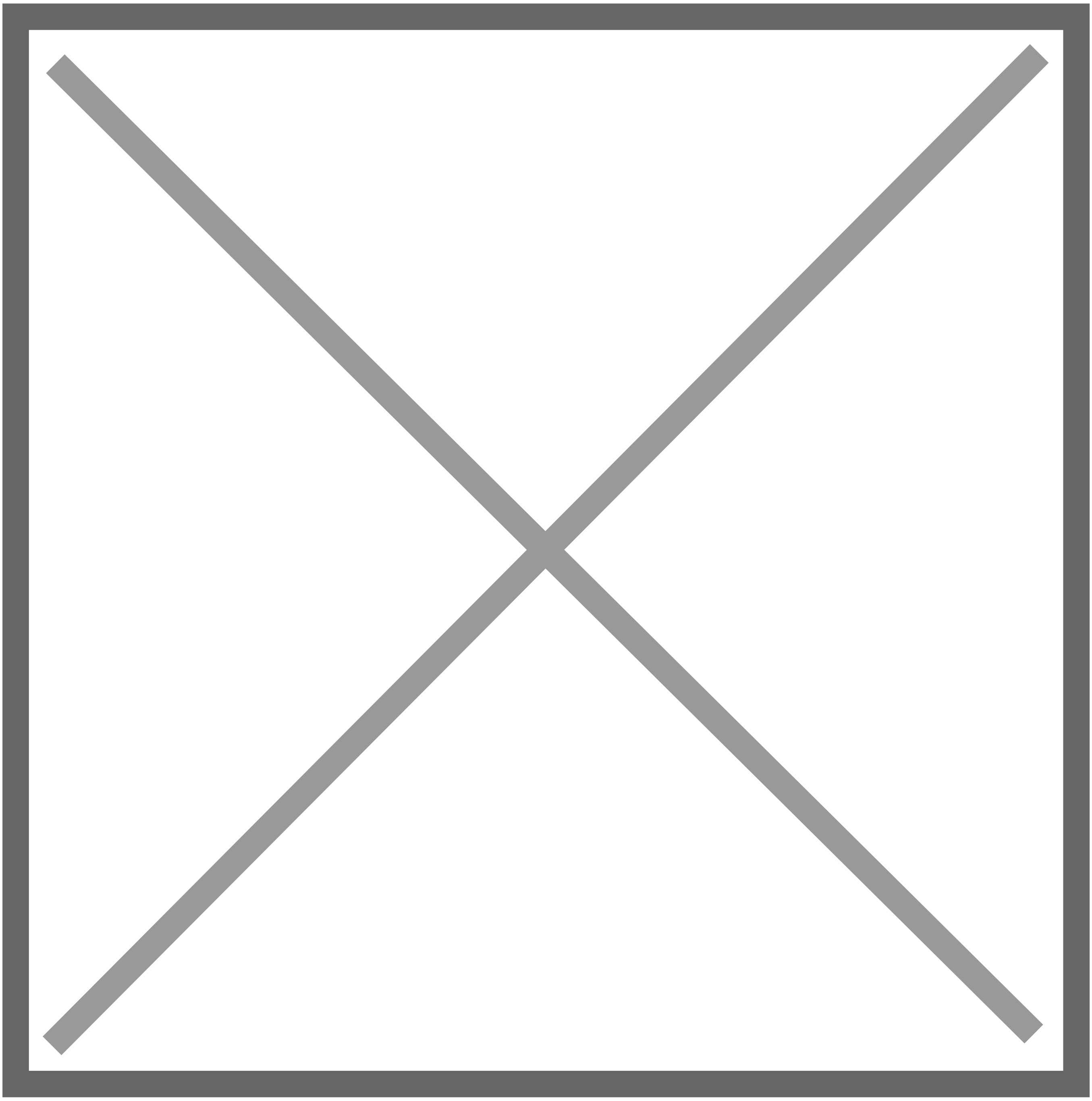
Severity Order

This will give the order in which you want the severity status to be shown in order from 1 upwards

Email Frequency

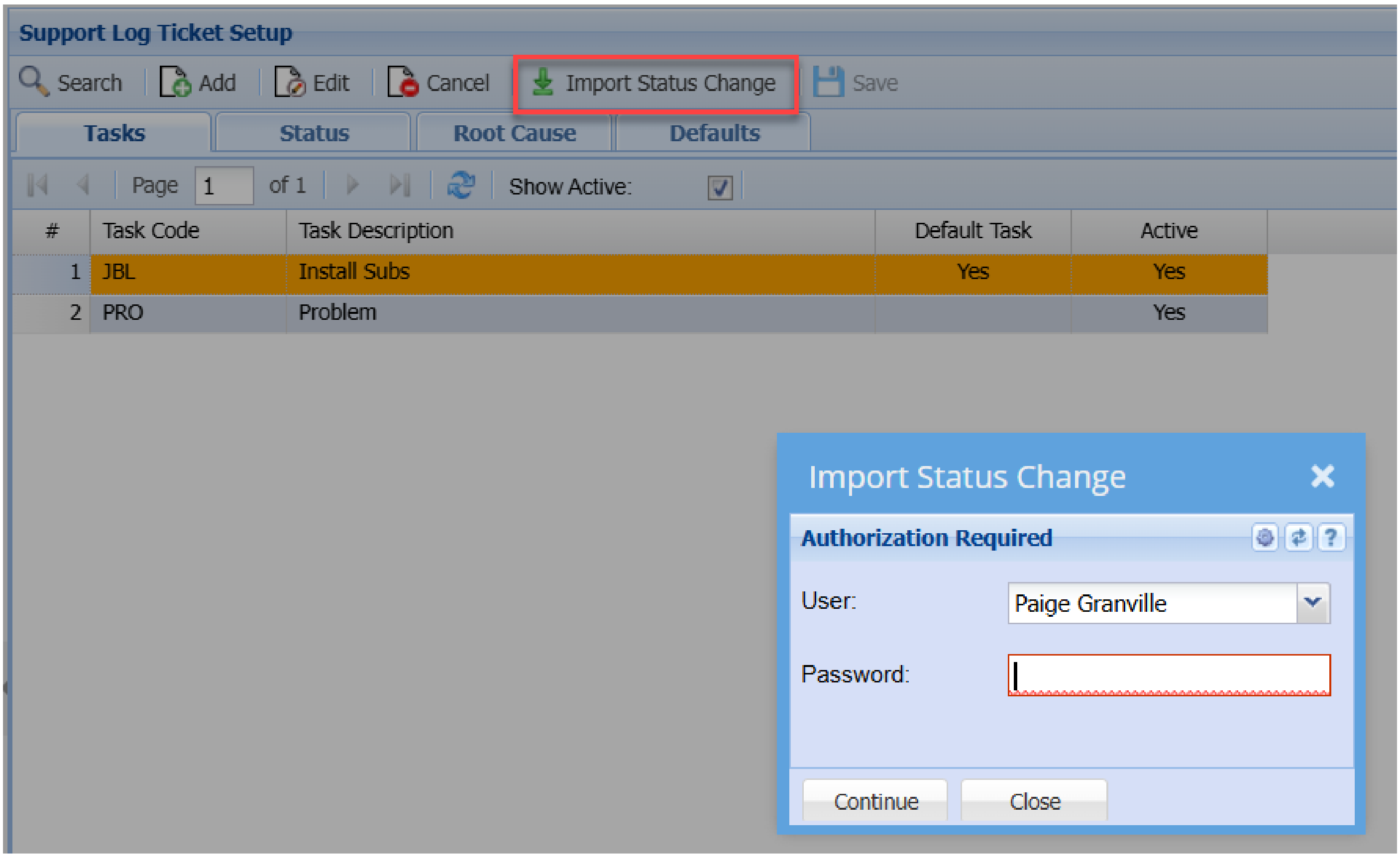
The email frequency will send out emails to internal support indicated persons every X minutes until the logged support log ticket is looked at and assigned.

If you set to 30 minutes, the system will send the selected support people an email every 30 minutes until someone handles the log.



Import Status Change

This is assigned when a PO has been authorised by a manager and now can be ordered



User	to select a user from the drop-down arrow for authorisation
Password	to enter user's password to allow the authorisation

Contract Maintenance Menu

Contract Maintenance Setup

Video Training Manual 2016 - Click Here

The Time logging setup is done under the contract maintenance menu

There are 3 setups required:

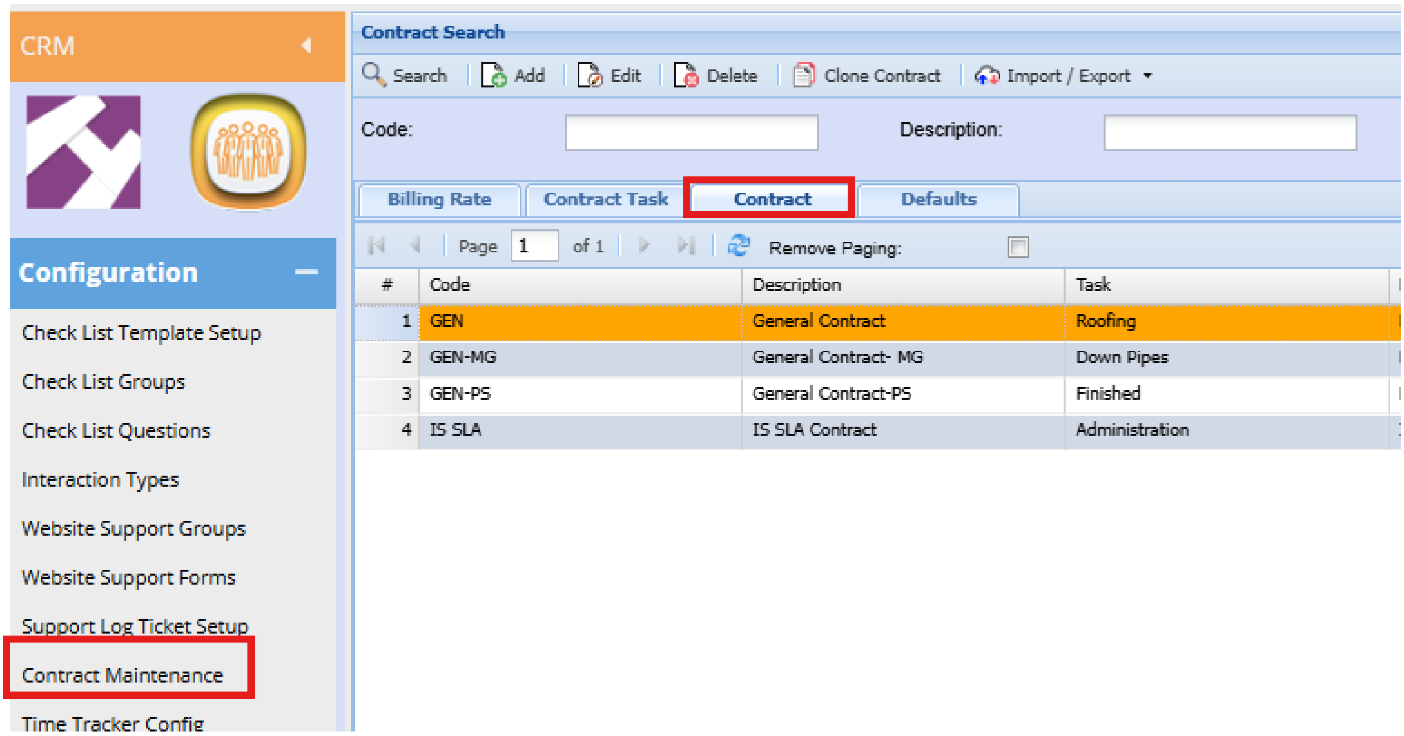
1. The contract
2. The tasks
3. Service items
4. Billing Rates

Once these have been setup, you will need to link these to one another

CRM Module> Configuration> Contract Maintenance

Contract Task setup

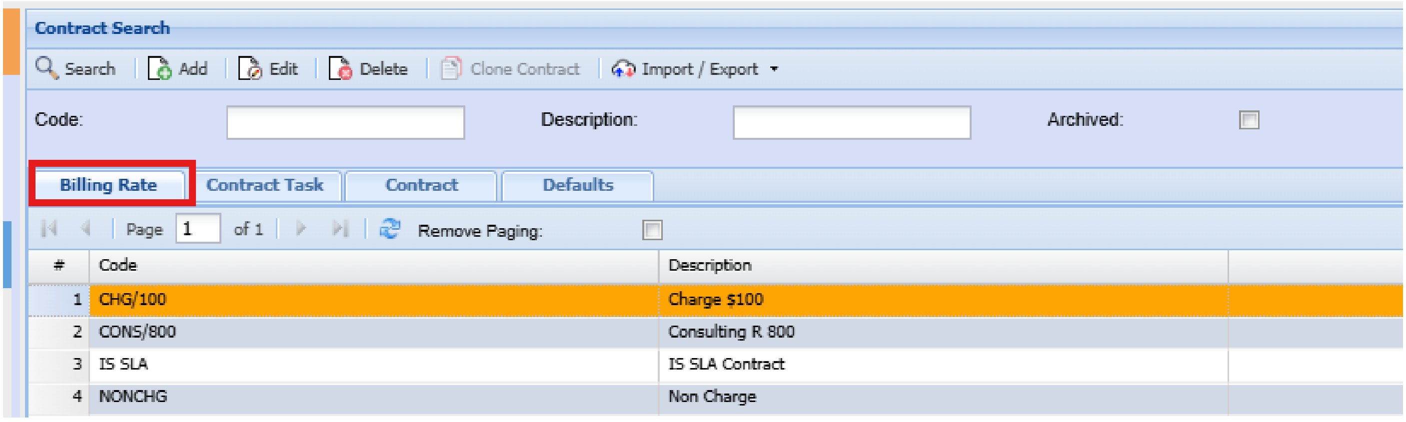
Click the Contract Tab

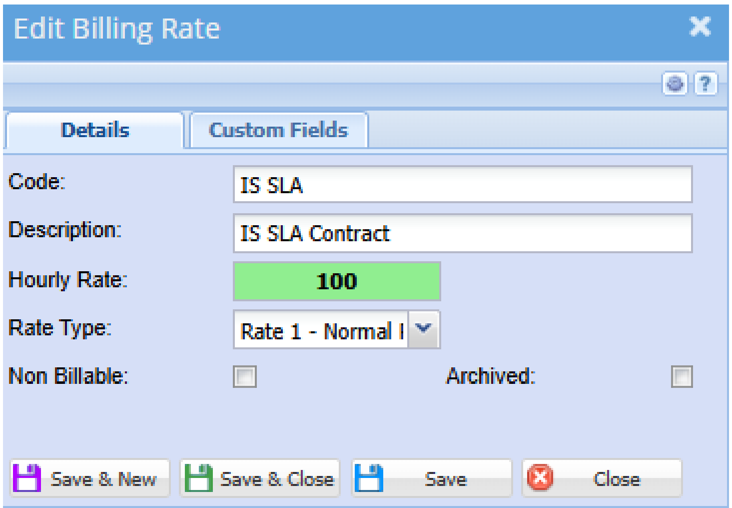


Add	To create a new Contract
Edit	To edit existing contracts

Code	Enter a code for the Contract
Description	Enter a description for contract
Archived	This is used to flag obsolete contracts that are no longer in use. we do not allow them to be deleted due to audit trails and historic time logs that may have the contract linked

Billing Rate Tab



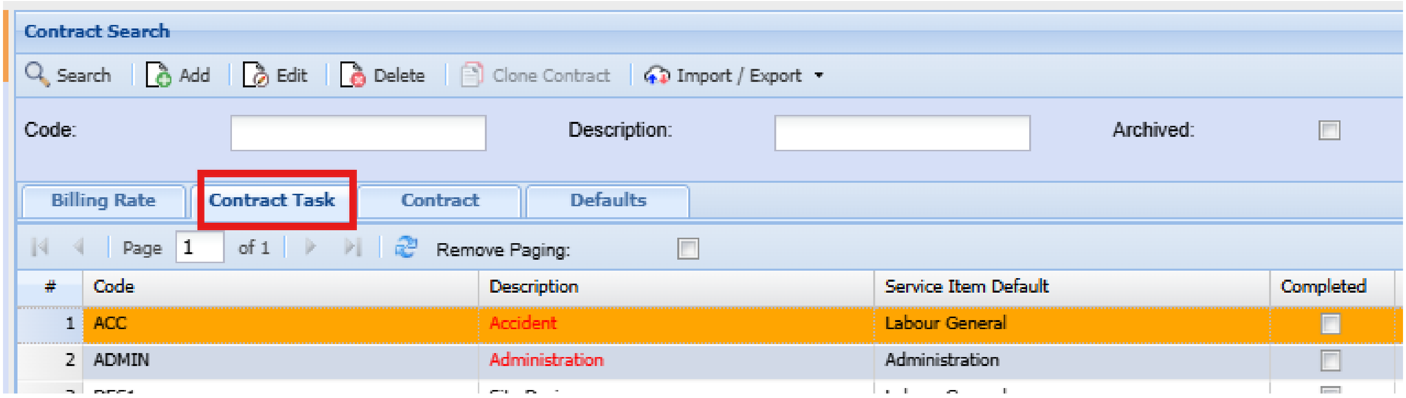


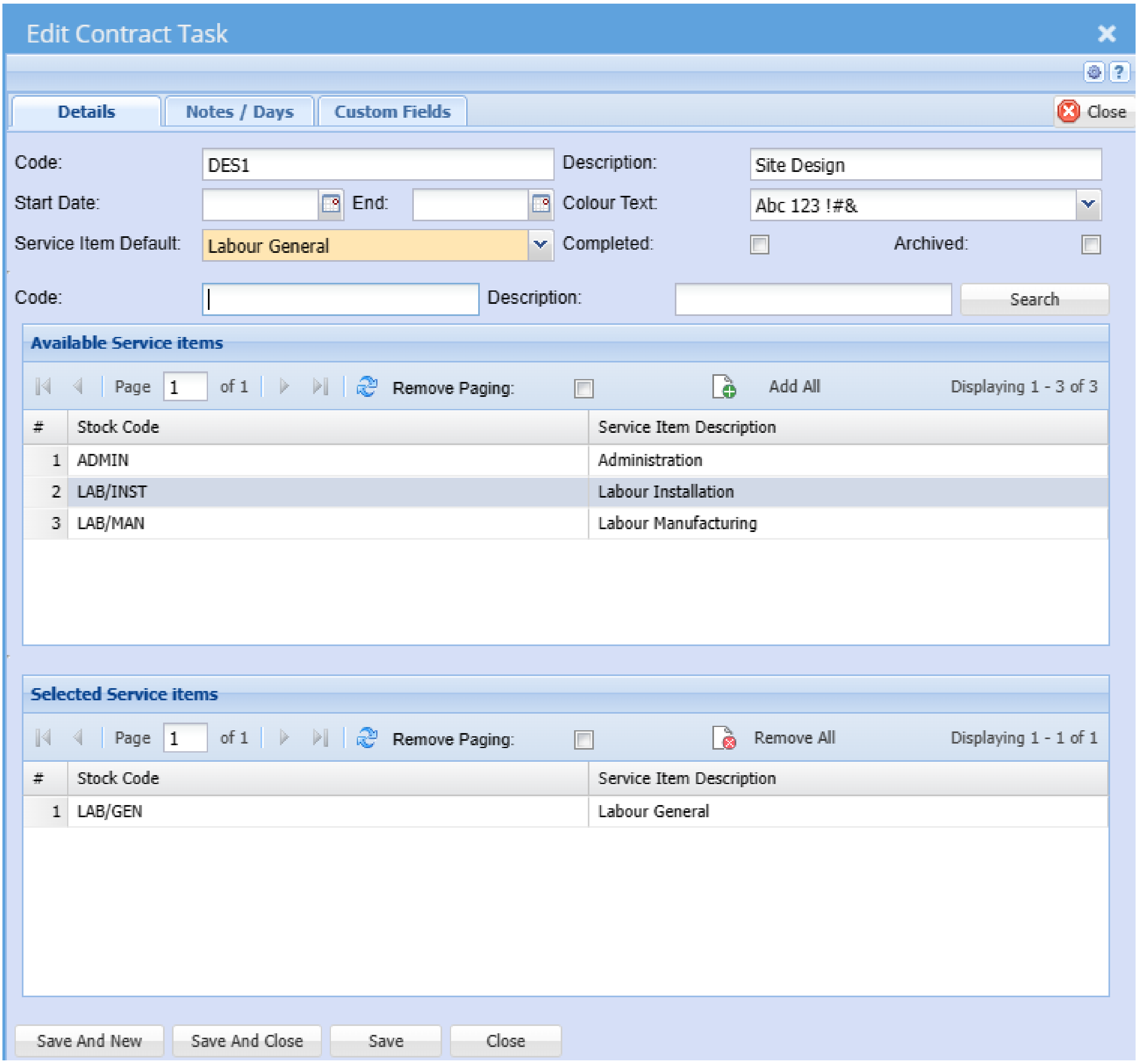
Add	To add a new billing rate
Edit	To edit an existing rate
Code	Enter SLA or billing rate code
Description	Enter brief description of SLA or billing rate
Hourly Rate	Enter the amount billed per hour
Rate Type	Select the billing rate tye on the drop down
Non Billable	Put a tick of an SLA is non billable
Archived	If the archived box is ticked, the billing rate will be achieved

Contract Task Tab

Video training Manual 2016 - [Click Here]

Click the Contract Task Tab





Add	To add a new task
Edit	To edit an existing task
Code	Enter an code for the task
Description	Enter a task description or name
Start Date	The date could be set to a year if the tasks are to be reviewed yearly - Not mandatory
End	The date could be set to a year if the tasks are to be reviewed yearly - Not Mandatory
Colour Text	you can enter colour codes to differentiate the different tasks

Service Item Default	This field allows the default service to be chosen from the selected list
Completed	
Archived	If the archived box is ticked, the billing rate will be achieved
Code	This field allows the user to search for an existing service item code
Description	This field allows the user to search for an existing service using the description
Available Service Items Grid	These will be the available service items that can be selected to be used in the service item for billing purposes
Selected Service Items Grid	These are the service items selected from the above list that will be available for use

The date could be set to a year if the tasks are to be reviewed yearly

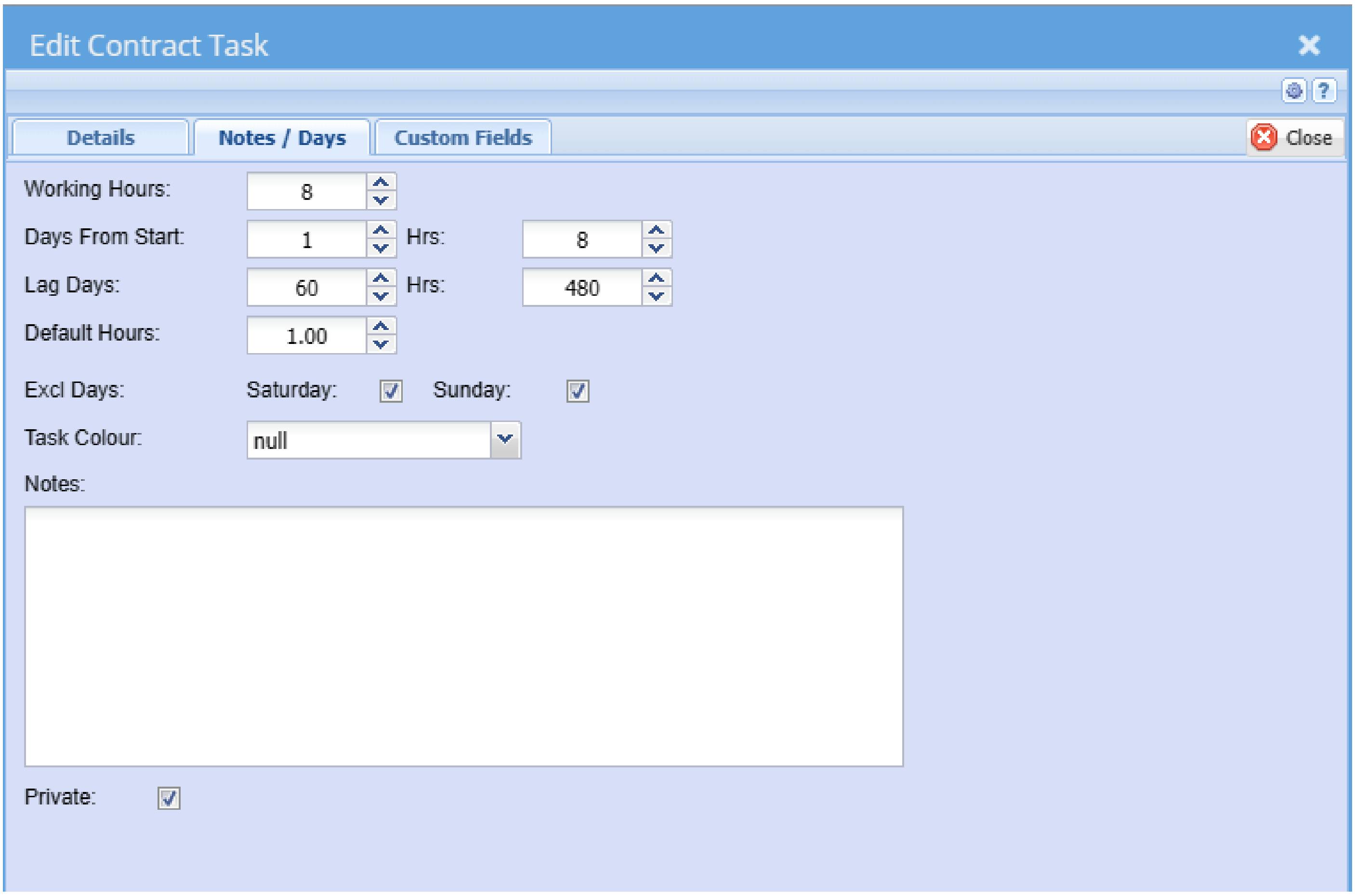
Buttons

Search	Search button to populate the available service item list
Add All	Allows the user to add existing items
Remove All	Allows the user to remove all selected items

Note/Days

These fields define the working day hours

these details are not mandatory to complete. they are typically used for scheduling



Working Hours	
Days From Start	
Hrs	
Lag Days	
Hrs	
Default Hours	
Excl Days	
Text Colour	
Notes	Users can add notes for internal use
Private	

Link Contract to Tasks & billing rates

Click the Contract tab

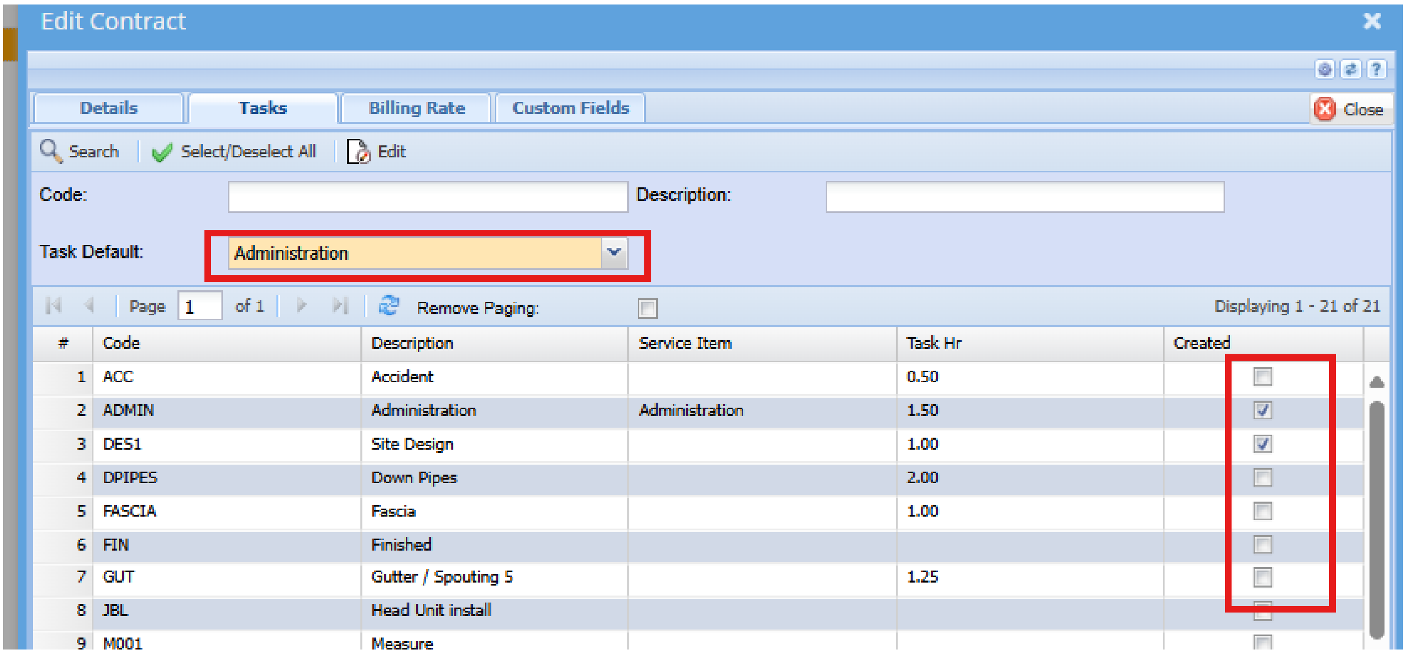
Click edit to edit the contract

Click the task tab

Activate the relevant task for the specific contract

Select the default task

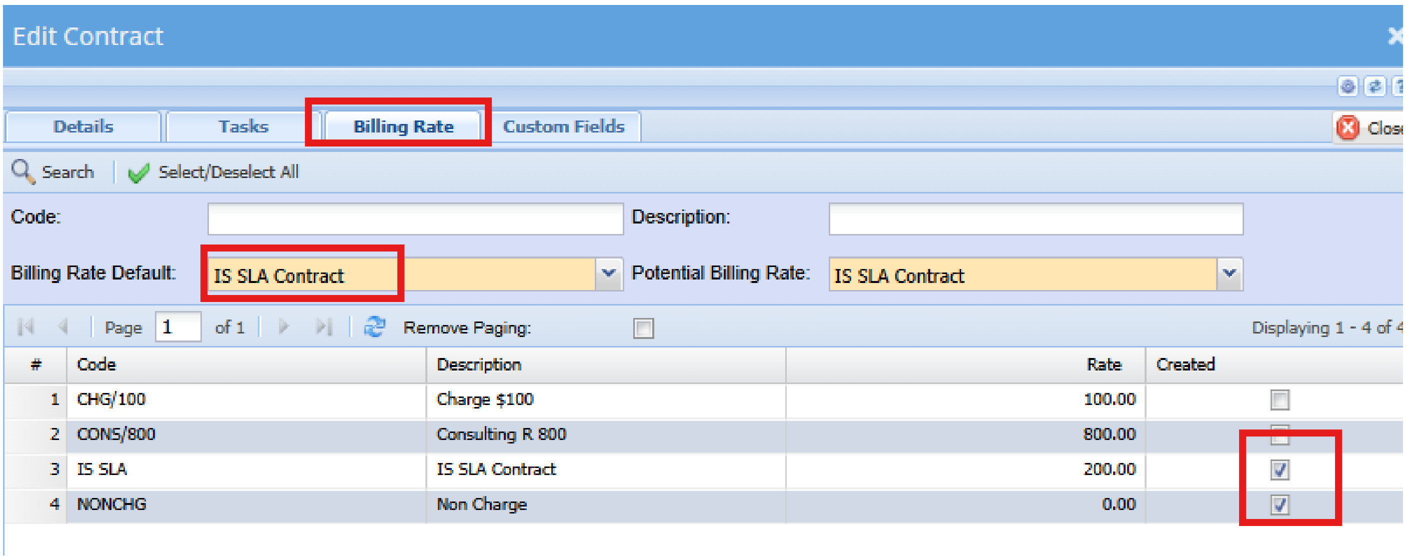
Save and close



Click the Billing Rate tab

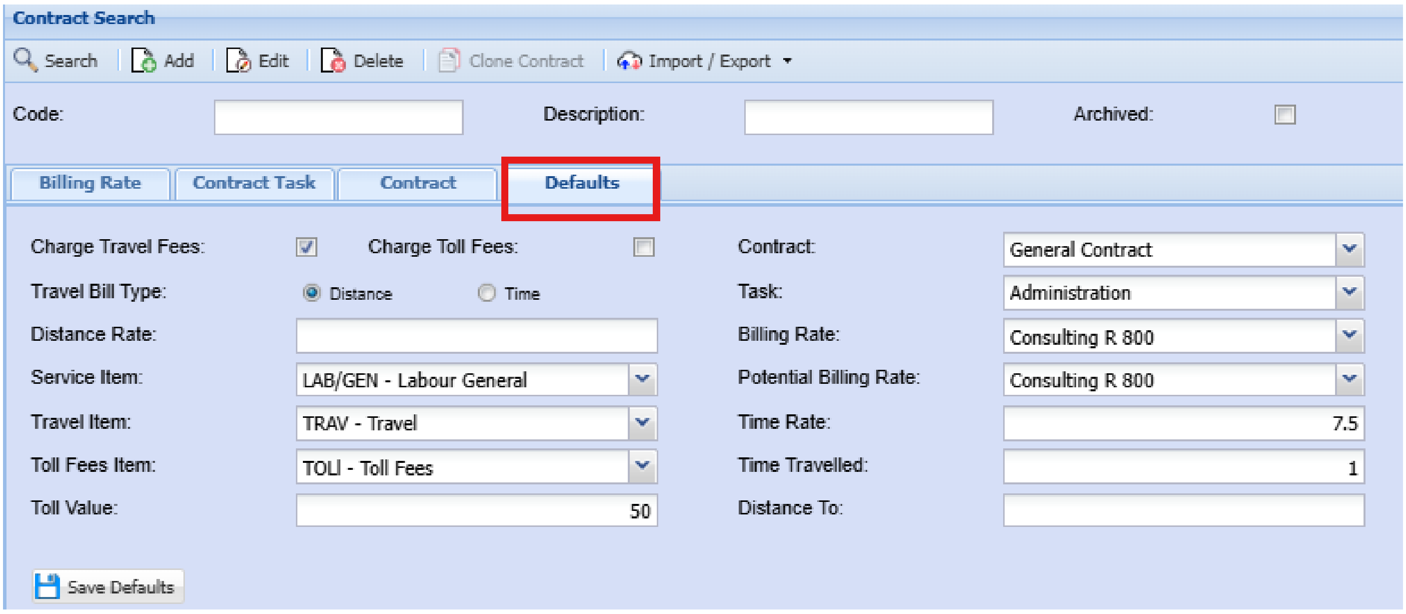
Activate the relevant rates for the task and select the default rate

Save and Close



Defaults Tab

This tab allows one to set certain defaults, so the user does not have to complete all these fields when capturing the time logs.



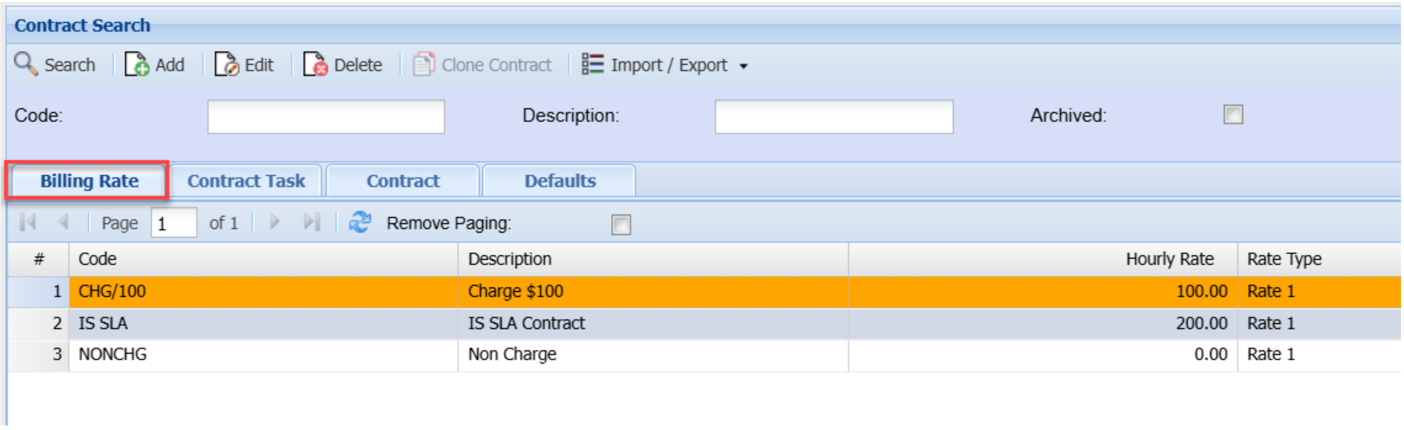
Charge Travel Fees	This will set the default to always charge travel. Tick off will set default to off, indicating no travel charges. user can manually tick the box on time log capture if applicable.
Charge Toll Fees	This will set the default to always charge toll fees. Tick off will set default to off, indicating no toll fees charges. user can manually tick the box on time log capture if applicable.
Travel Bill Type	Sets the default to charge travel based on distance or time travelled
Distance Rate	Rate per kilometer
Service Item	this is the default service item related to the task selected for the contract
Travel Item	Service item for travel
Toll Fees item	Service item for toll fees
Toll Value	default Toll price
Contract	Default contract. this can be set per user on the user profile setup as well

Task	Default task related to the contract
Billing Rate	Default billing rate to pull through
Potential Billing Task	Default potential billing rate
Time Rate	Travel time default rate
Time Travelled	Travel time default, eg. 1 = 1 hour
Distance To	

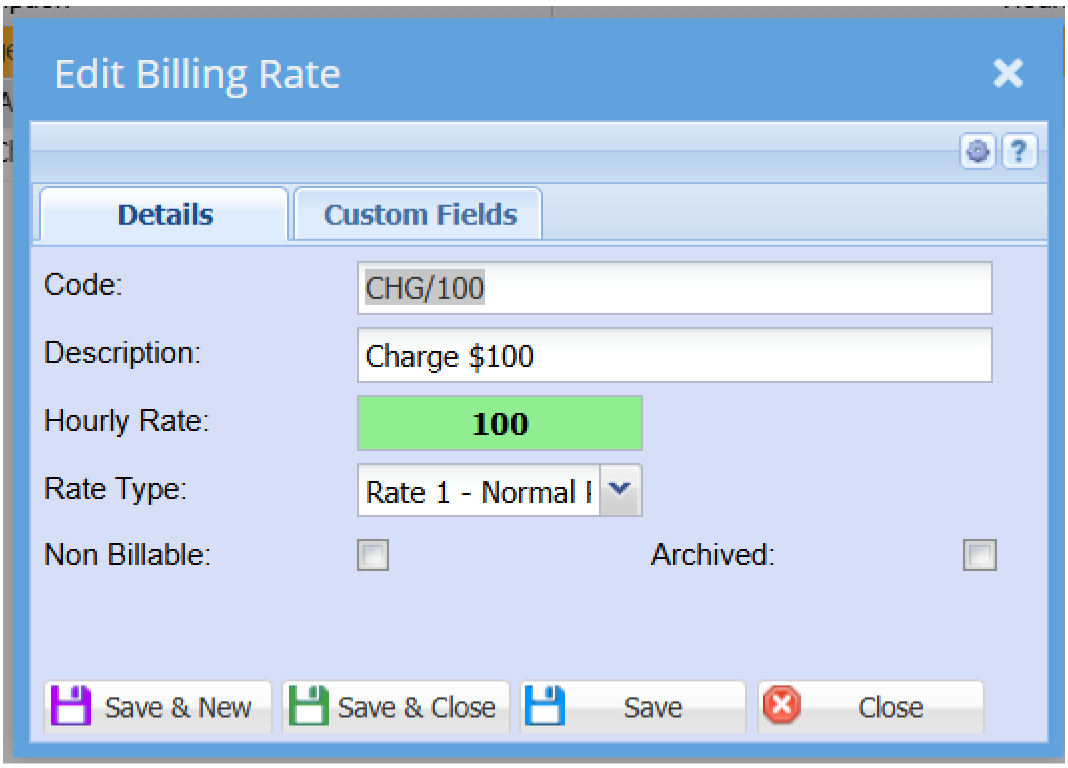
Contract Maintenance Menu

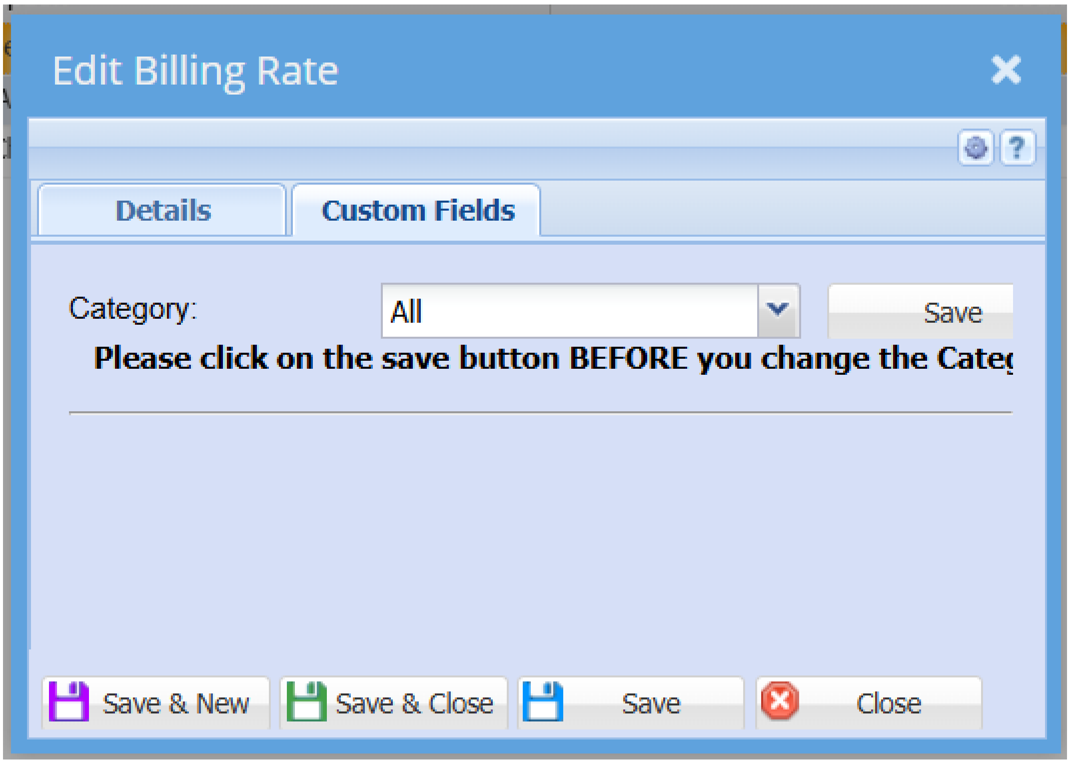
Add Contract

Billing Rate

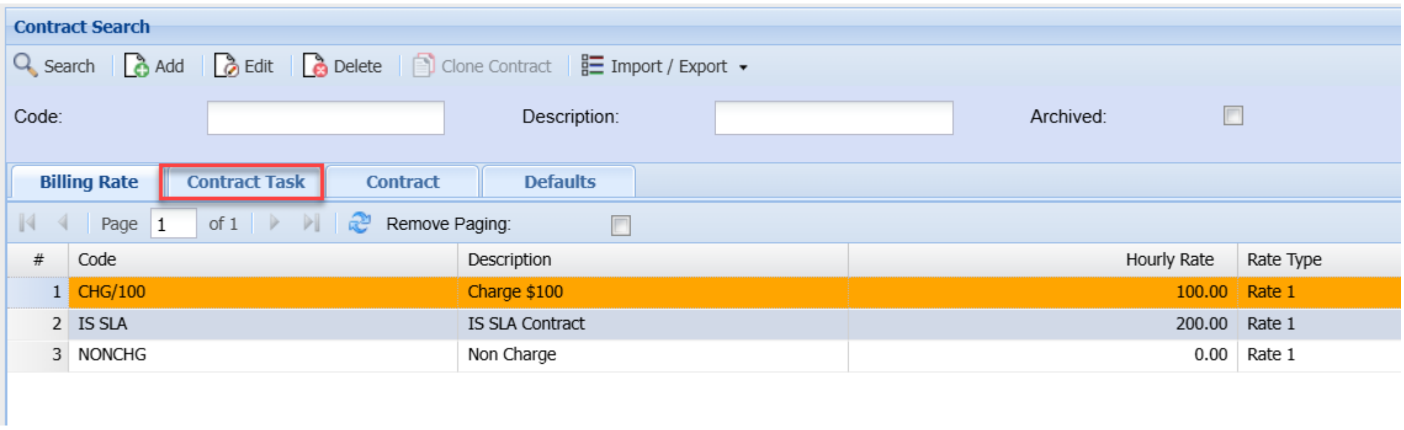


Adding Billing Rate

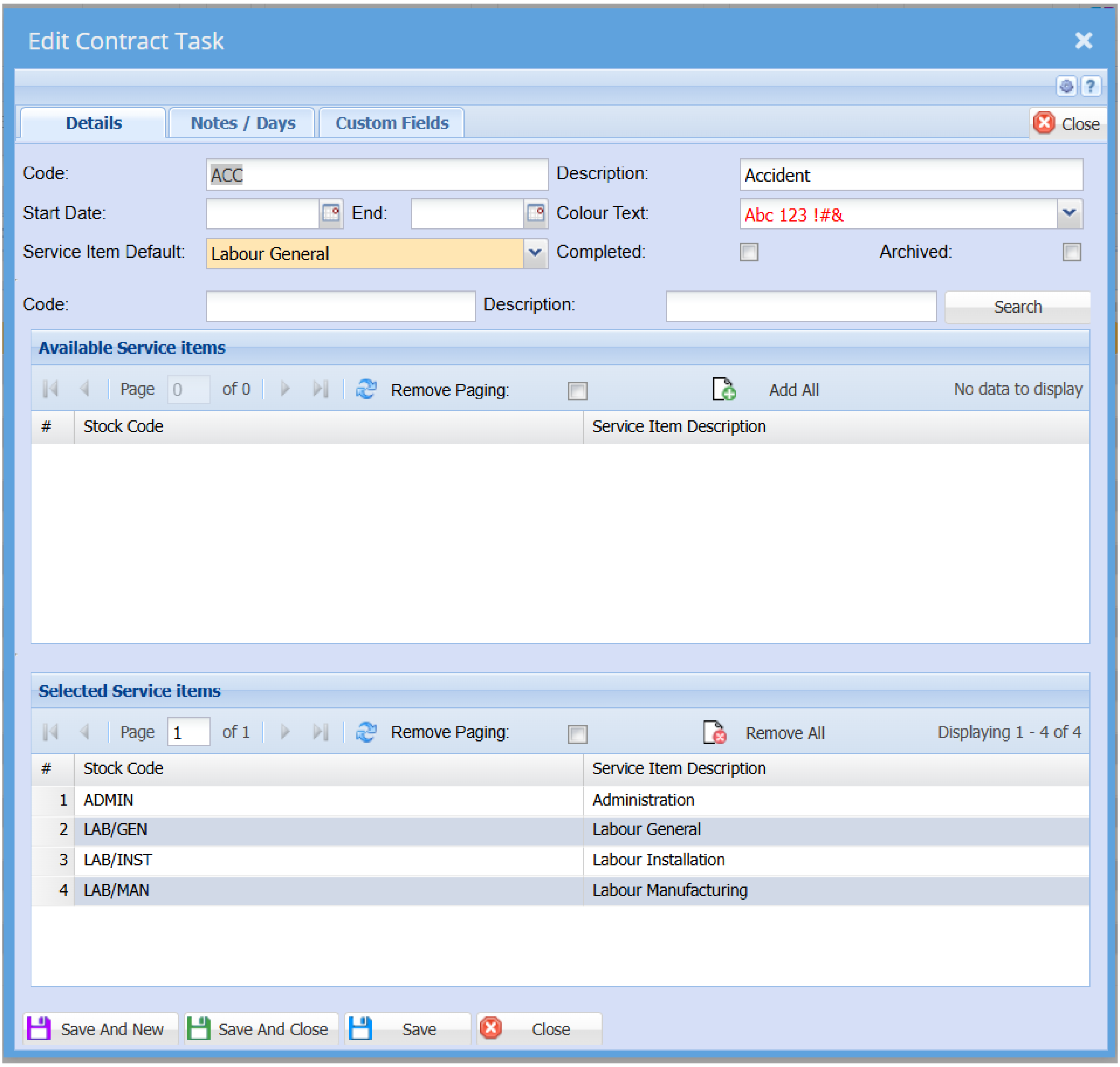


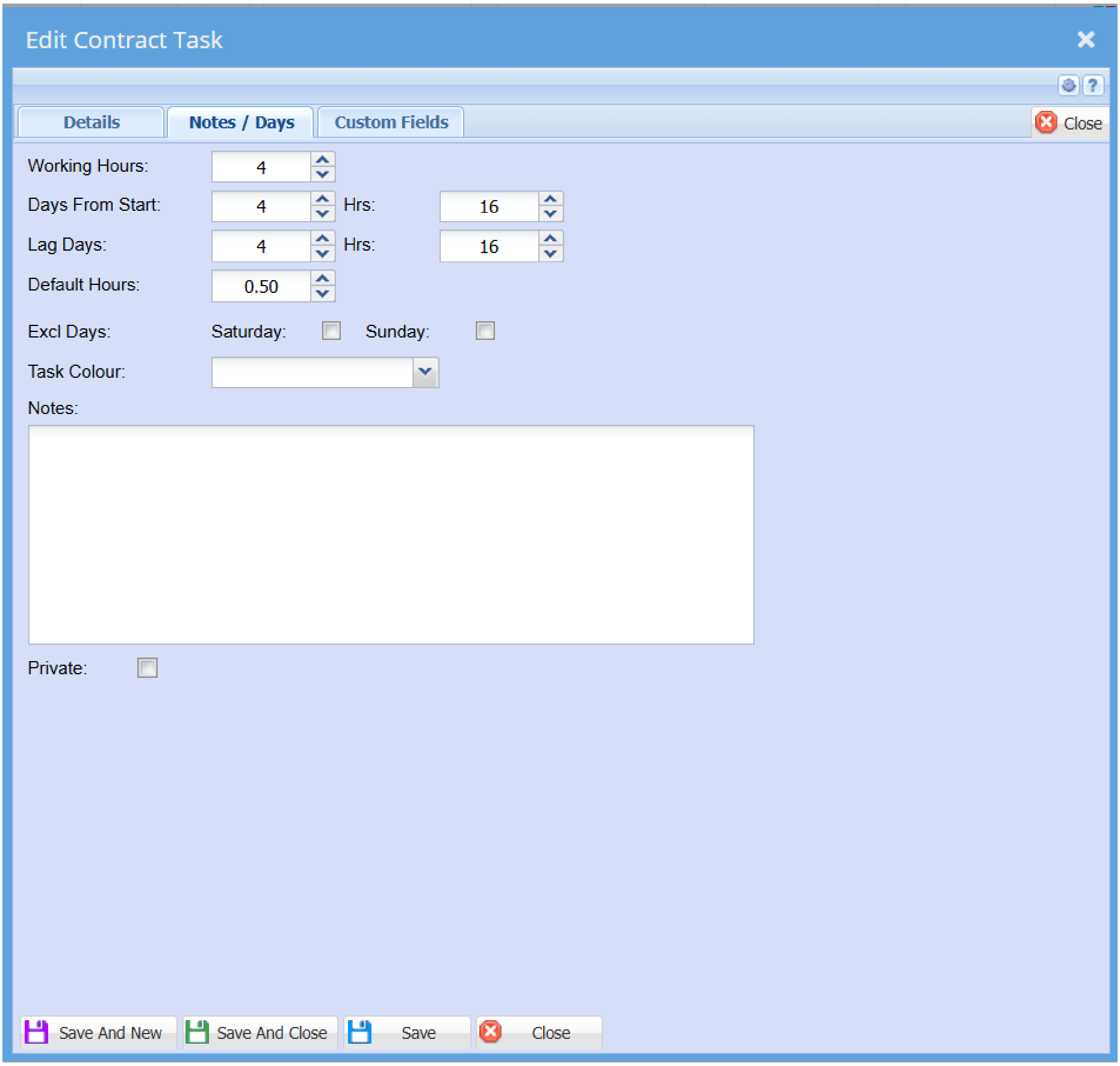


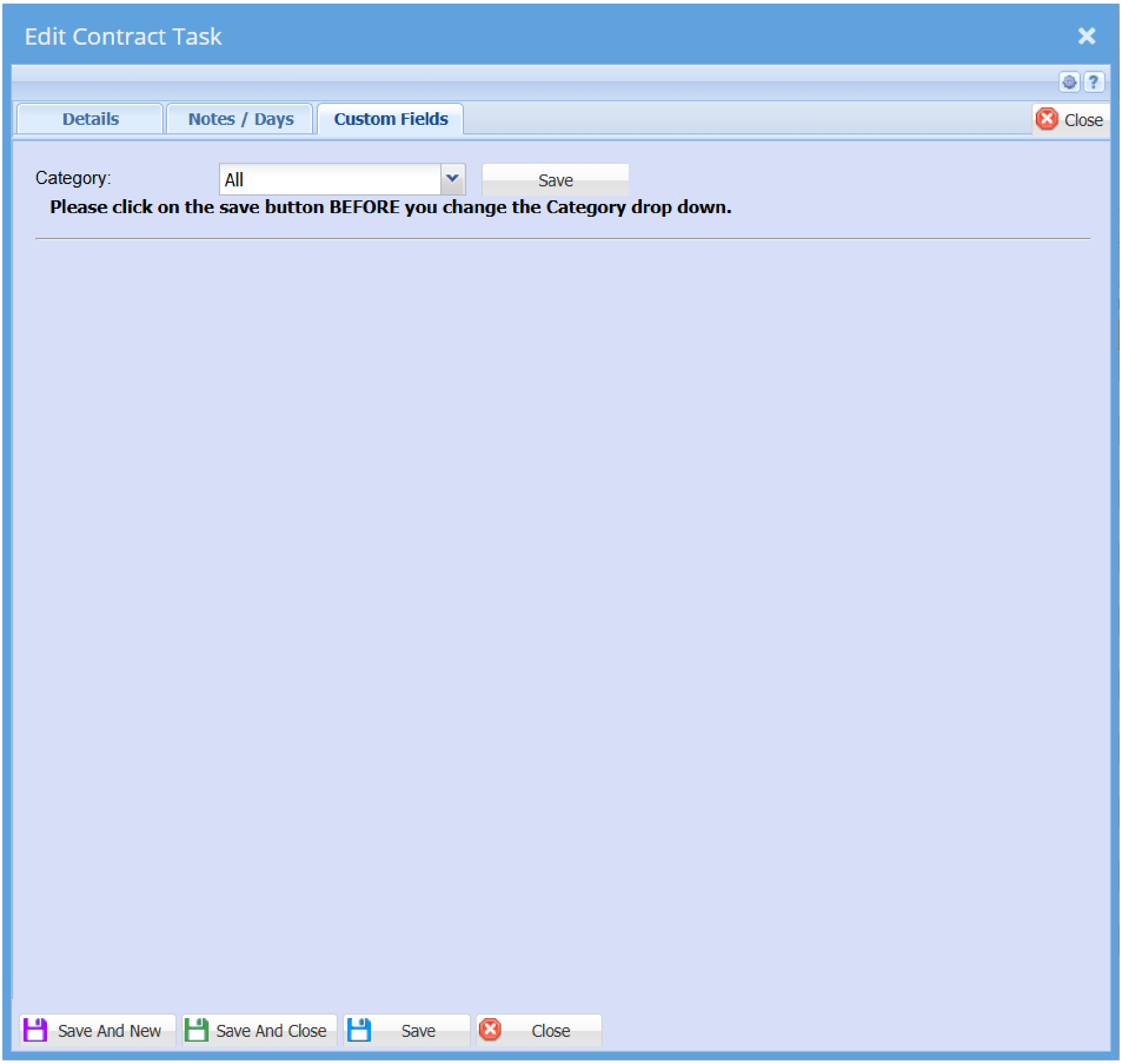
Contract Task



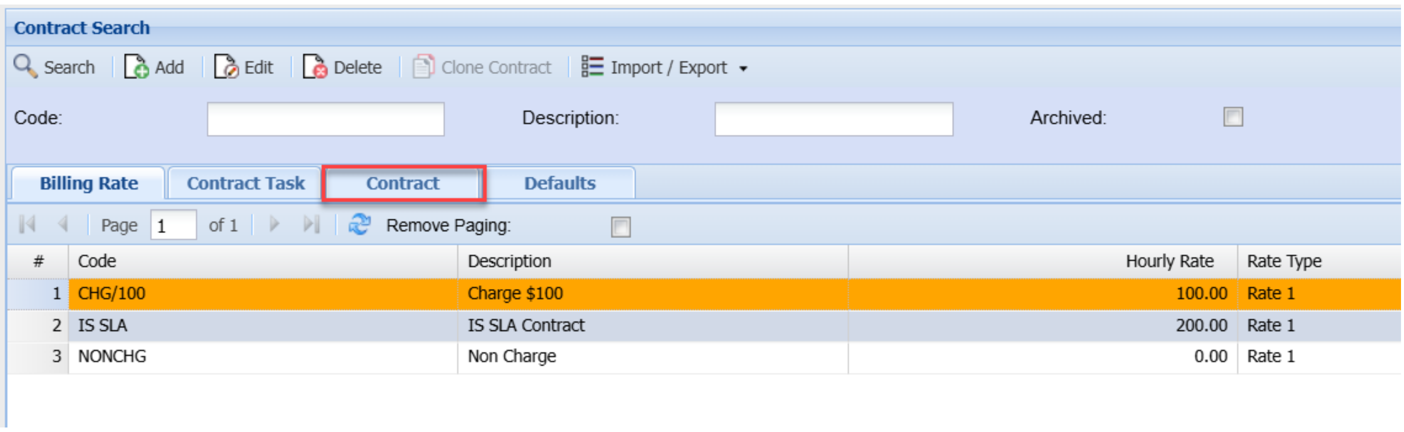
Adding Contract Task

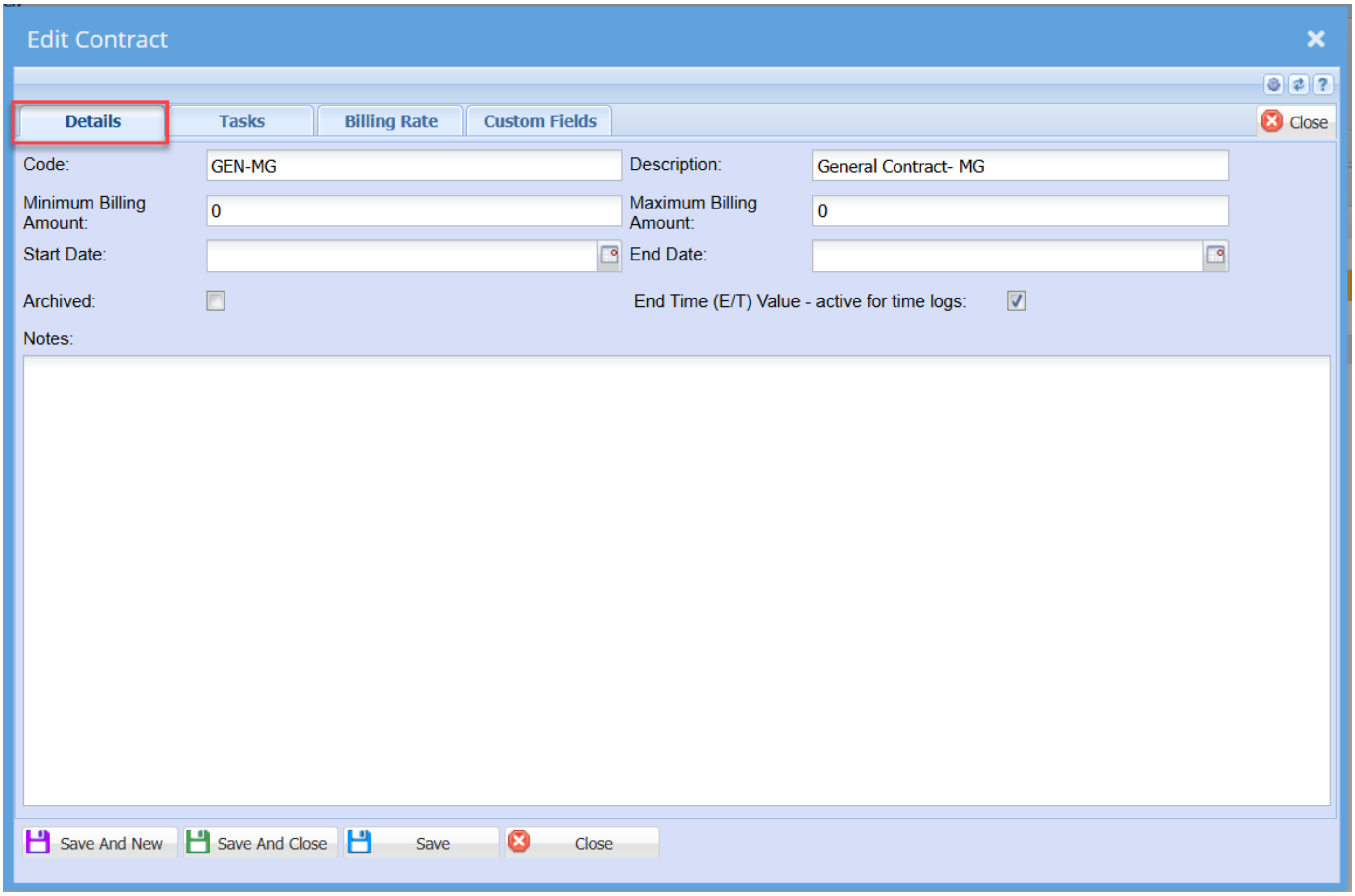

Edit Contract Task
Details
Notes / Days
Custom Fields
Close
Code: ACC
Description: Accident
Start Date:
End:
Colour Text: Abc 123 !#&
Service Item Default: Labour General
Completed:
Archived:
Code:
Description:
Search
Available Service items
Page 0 of 0
Remove Paging:
Add All
No data to display
Stock Code Service Item Description
Selected Service items
Page 1 of 1
Remove Paging:
Remove All
Displaying 1 - 4 of 4
Stock Code Service Item Description
1 ADMIN Administration
2 LAB/GEN Labour General
3 LAB/INST Labour Installation
4 LAB/MAN Labour Manufacturing
Save And New
Save And Close
Save
Close


Edit Contract Task
Details
Notes / Days
Custom Fields
Close
Working Hours:
4
Days From Start:
4
Hrs:
16
Lag Days:
4
Hrs:
16
Default Hours:
0.50
Excl Days:
Saturday:
Sunday:
Task Colour:
Notes:
Private:
Save And New
Save And Close
Save
Close


Edit Contract Task
Details
Notes / Days
Custom Fields
Close
Category:
All
Save
Please click on the save button BEFORE you change the Category drop down.
Save And New
Save And Close
Save
Close

Contract


Contract Search
Search
Add
Edit
Delete
Clone Contract
Import / Export
Code:
Description:
Archived:
Billing Rate
Contract Task
Contract
Defaults
Page 1 of 1
Remove Paging:
Code Description Hourly Rate Rate Type
1 CHG/100 Charge $100 100.00 Rate 1
2 IS SLA IS SLA Contract 200.00 Rate 1
3 NONCHG Non Charge 0.00 Rate 1



This is where the contract between the provider of a service and the user' details is created.

It has five tabs and four buttons

Detail Tab – The code and description are important to fill in.

Code – Code of the SLA

Short Description – brief description of the SLA

Minimum Billing Amount – minimum amount the customer and the service provider agree upon

Maximum Billing Amount – maximum amount the customer and the service provider agree upon

Start Date – beginning of the SLA started

End Date – The end of SLA

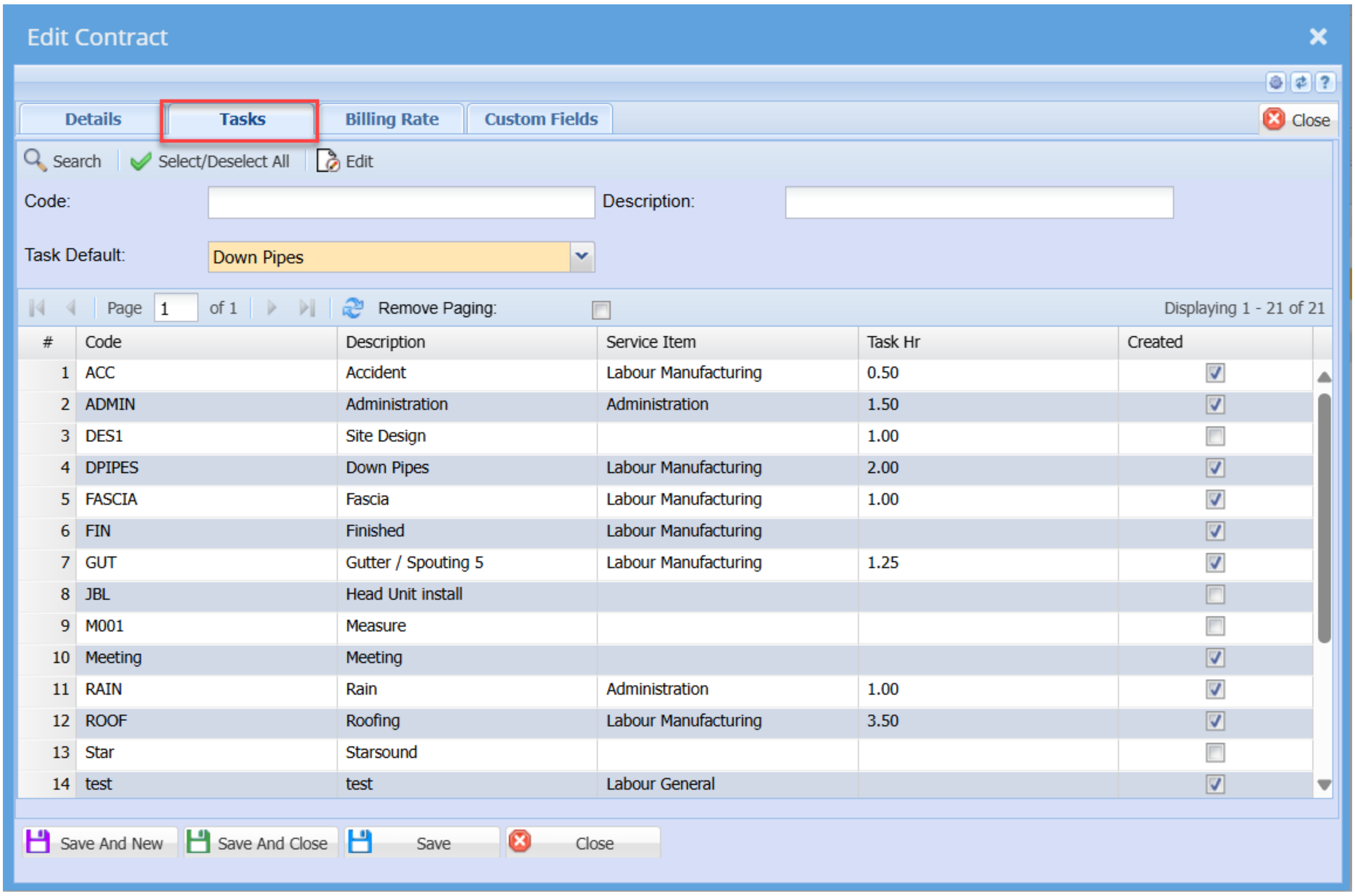
Archived – SLA will go to archives if the box is ticked

Notes Tab – customer notes regarding SLA

Custom Fields – a user can select from the category

Task Tab

This displays the list of tasks that can be selected for this user contract

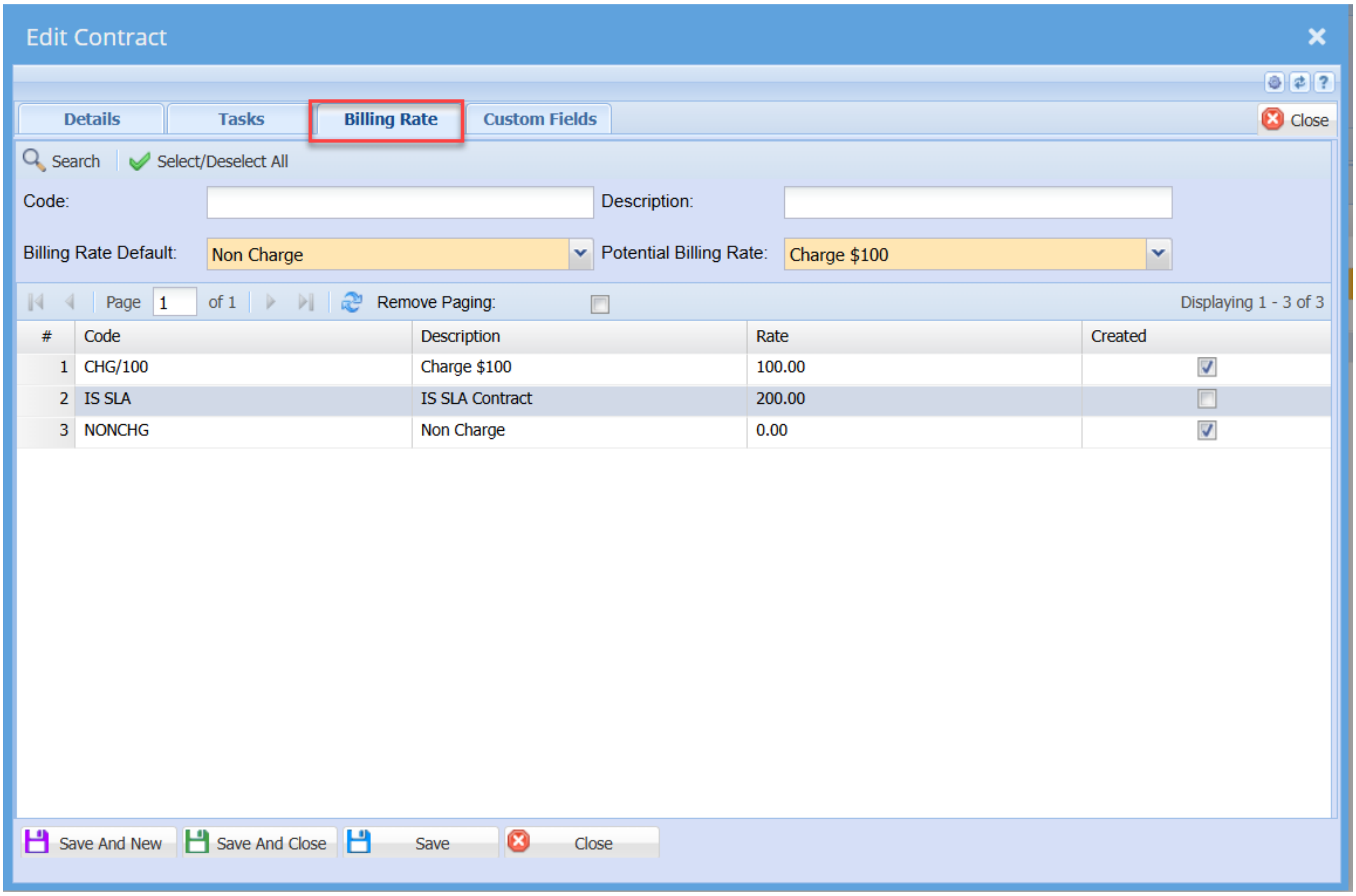


Search button - to search for existing tasks

Select /Deselect All button – selects all available tasks or unselect all the tasks

Billing Rates Tab

SLA rates selection



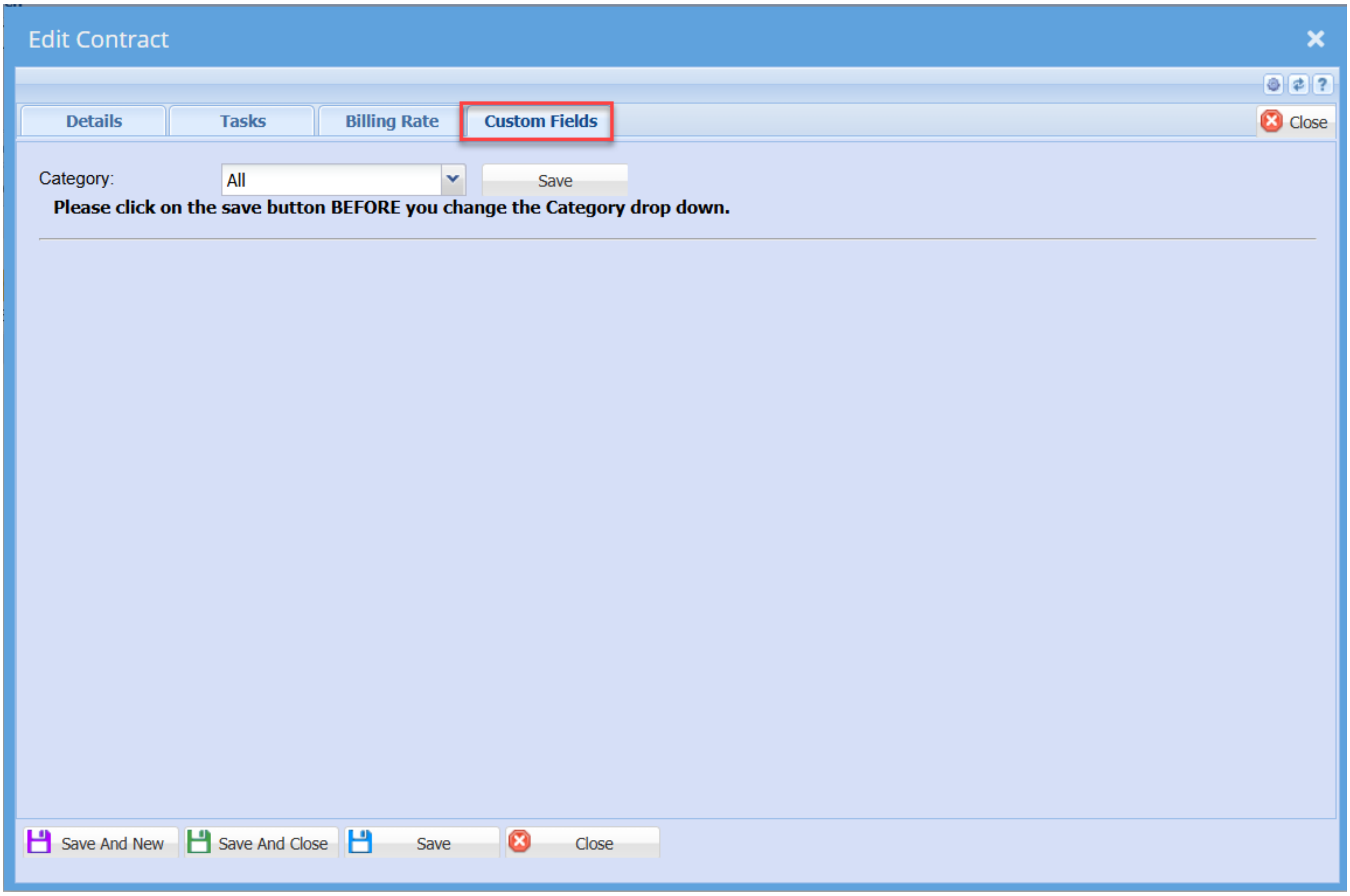
Search button - to search for existing billing rates

Select / Deselect All button – Selects all available billing rates or unselect all billing rates

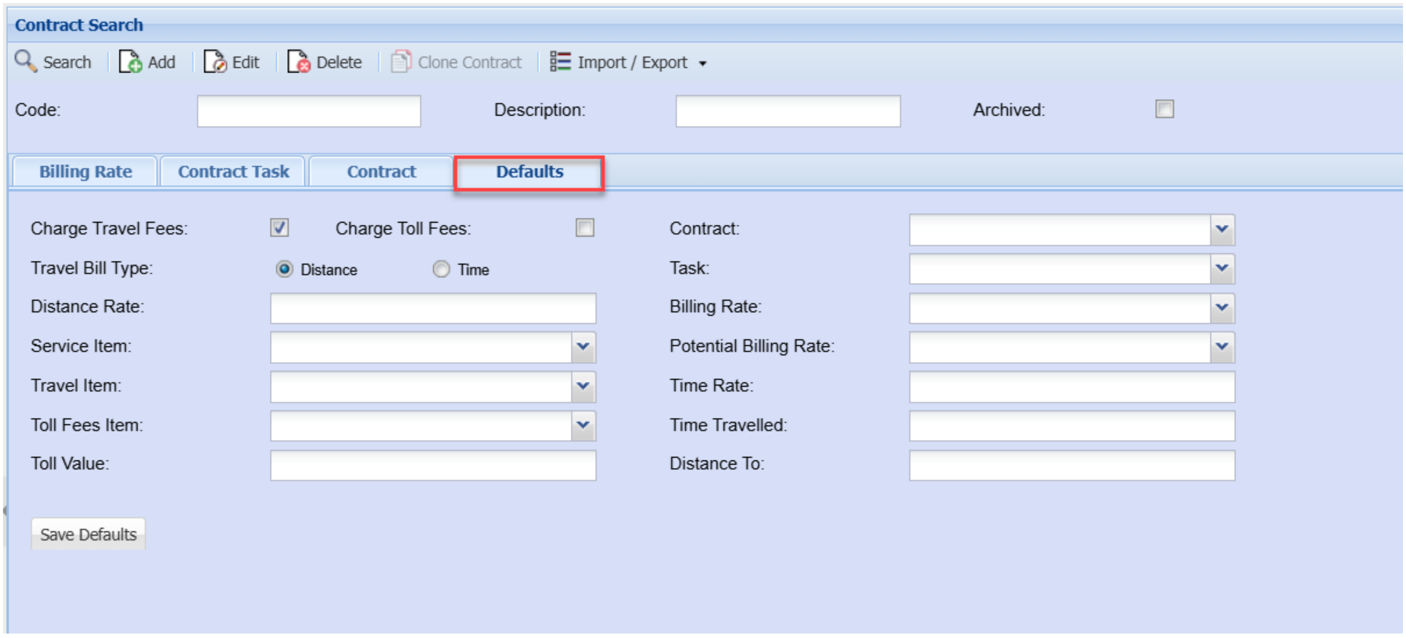
Billing Rate Default - Select from the list the defaulting billing rate when this contract is selected

Potential billing rate - Select from the the list the defaulting potential billing rate when this contract is selected

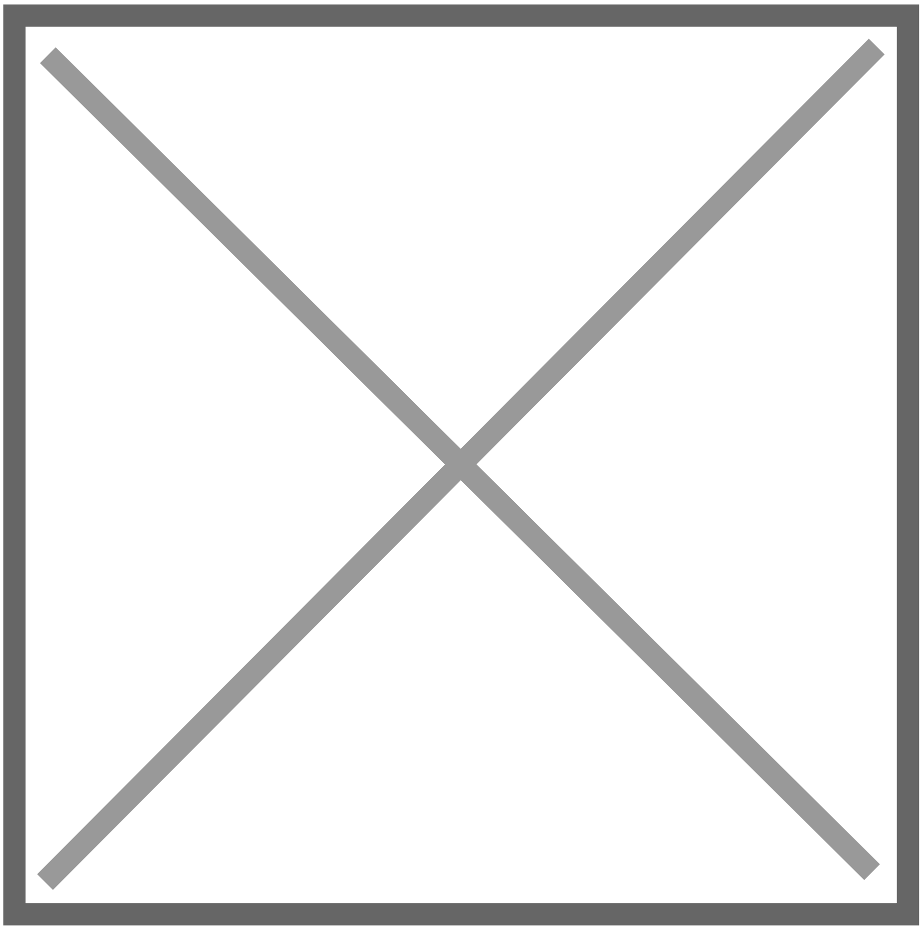
Custom Fields Tab


Edit Contract
Details
Tasks
Billing Rate
Custom Fields
Close
Category:
All
Save
Please click on the save button BEFORE you change the Category drop down.
Save And New
Save And Close
Save
Close

Defaults


Contract Search
Search
Add
Edit
Delete
Clone Contract
Import / Export
Code:
Description:
Archived:
Billing Rate
Contract Task
Contract
Defaults
Charge Travel Fees:
Charge Toll Fees:
Contract:
Travel Bill Type:
Distance
Time
Task:
Distance Rate:
Billing Rate:
Service Item:
Potential Billing Rate:
Travel Item:
Time Rate:
Toll Fees Item:
Time Travelled:
Toll Value:
Distance To:
Save Defaults

Import /Export Contract



The file to be imported must be in a CSV format.

Click on the Select Files… button to open the navigate window allowing the user to navigate to the file to be imported.

Once the desired file has been located either double click on the file or click the Open button.

Now click on the Upload button. If the upload was successful a window will appear confirming that the upload was successful. Click Ok.

The Import button now becomes enabled allowing the user to click on the Import button to import the file.

An Import Report will open displaying any errors in the import or displaying the successful import status.

Please Note :

The column headings can be left in the import file providing that the heading are as per the sample below.

Import File Layout

All items in RED are required fields.

No	Heading	Value
1	Code	CONTRACT001
2	Description	Contract Description 001
3	Minimum Billing Rate	1000
4	Maximum Billing Rate	3000
5	Start Date	2015-09-11
6	End Date	2016-09-11
7	Archived	0
8	Notes	This is a note
9	Task Default	Task Code
10	Billing Rate Default	Billing Rate Code
11	Tasks List	Task Code|Task Code|Task Code
12	Billing Rate List	Billing Rate Code| Billing Rate Code

Time Tracker Config Menu

Time Tracker Config

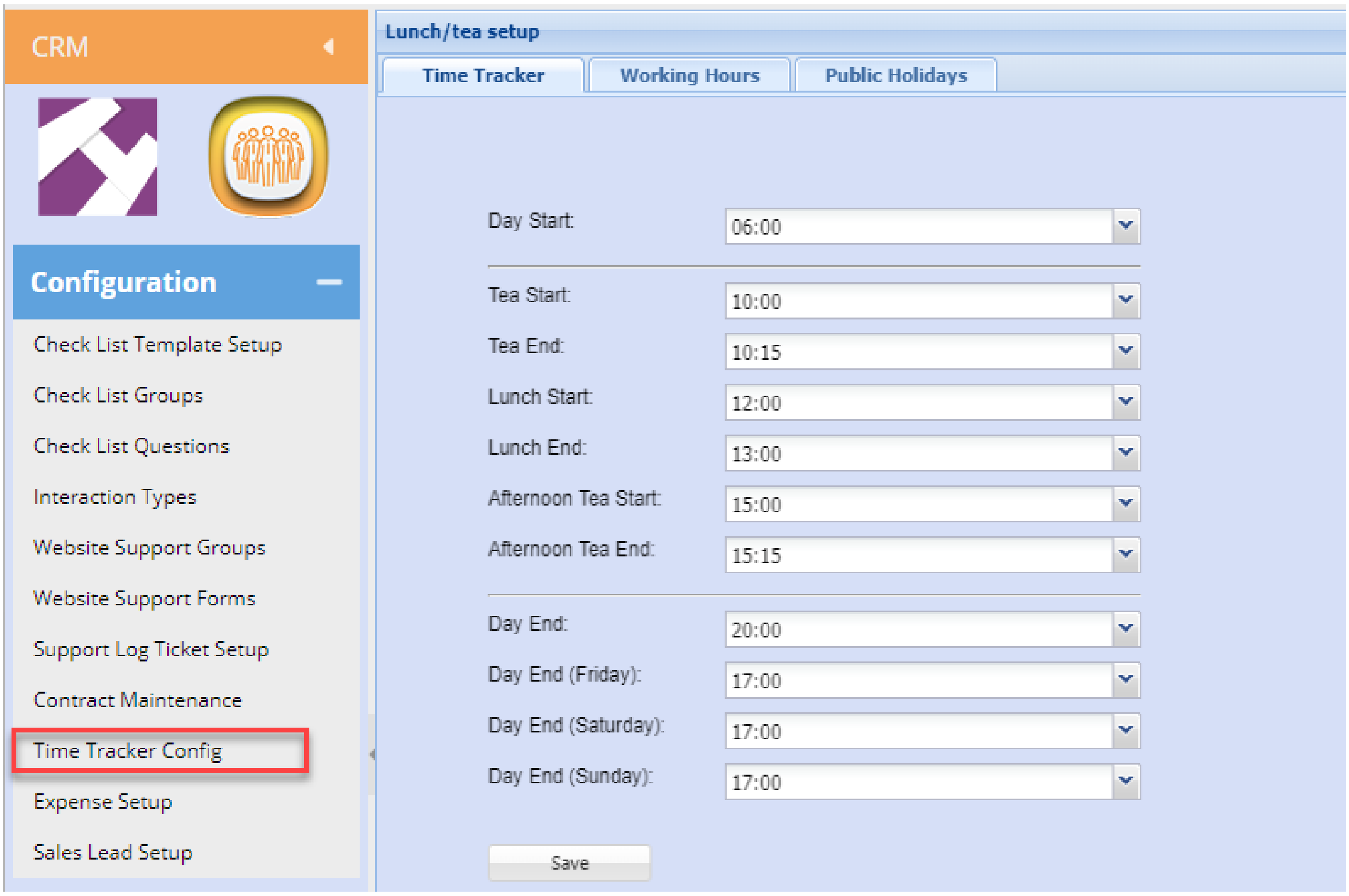
Time Tracker

Allow the user to set up different start and end times for Lunch/tea.

Video training manual 2016 - Click Here

CRM>Configuration>Time Tracker Config> Time Tracker Tab

> Time Tracker Configuration has moved from System Configuration module to CRM

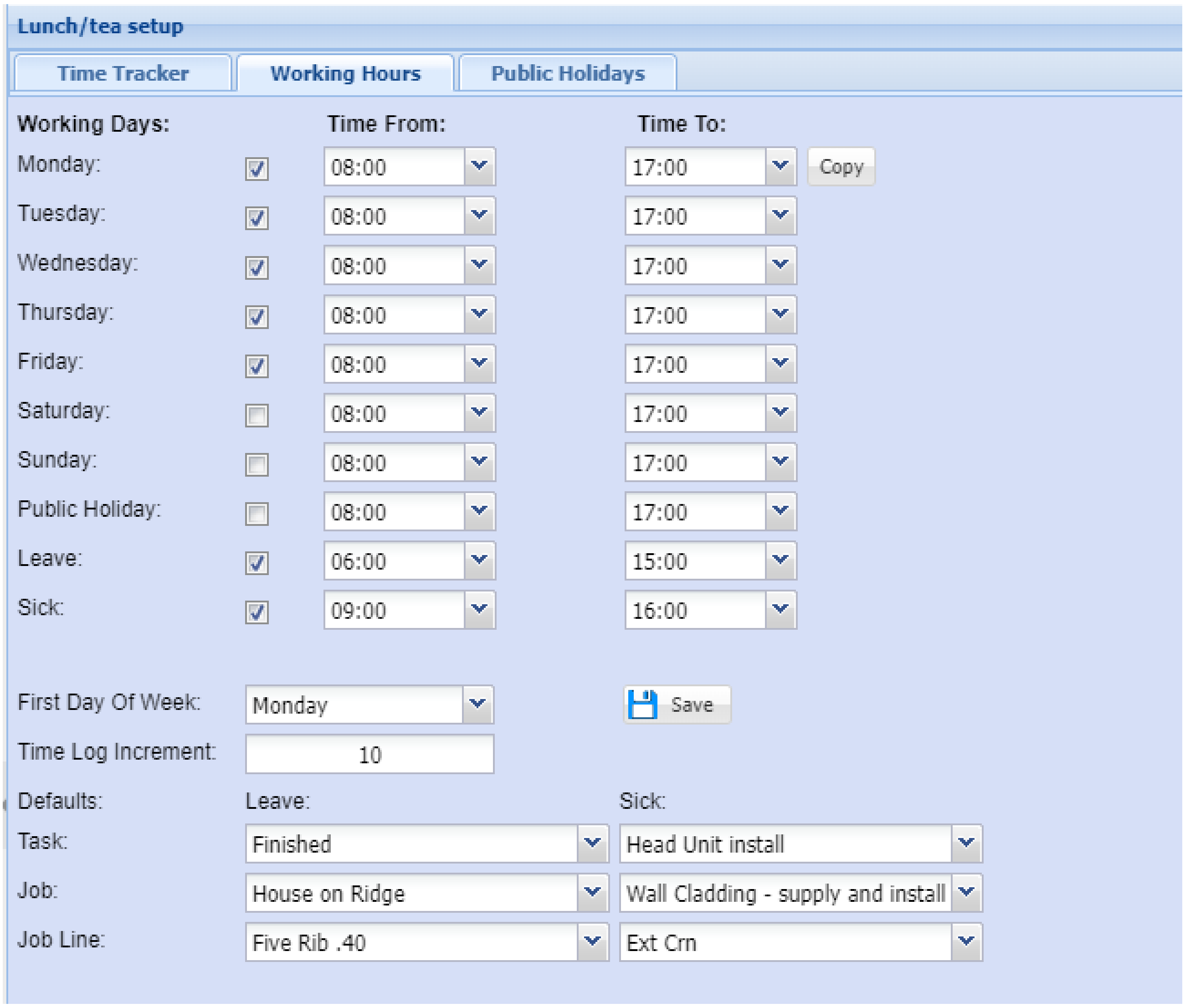


Day Start	The start of the day when the workers start to work.
Tea Start	The time that the work force stop working for tea.

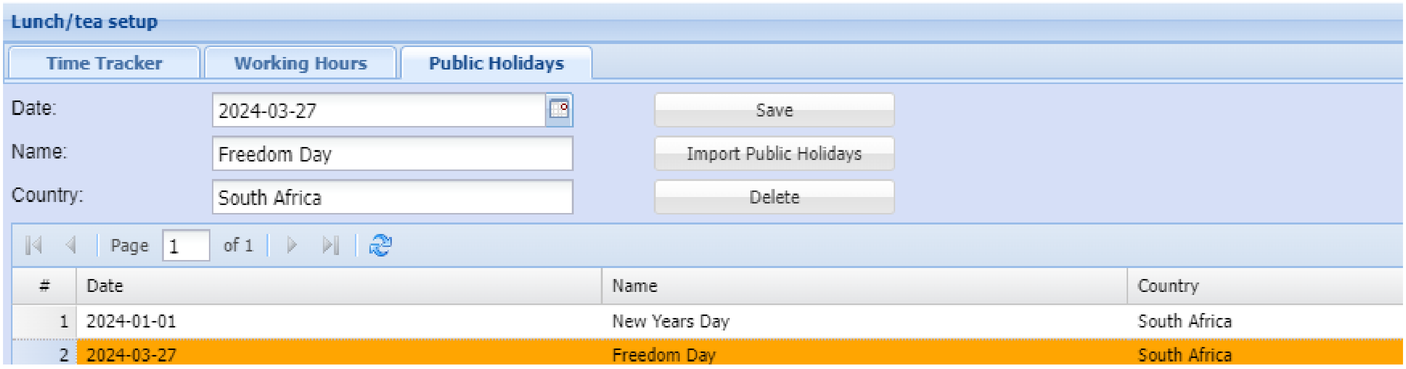
Tea End	The time that the work force start working again.
Lunch Start	The time that the work force stop working for Lunch.
Lunch End:	The time that the work force start working again

Working Hours

Setting the time log minutes



Publick Holidays



Date	
Name	
Country	
Grid	

Buttons

Save	
Import Public Holidays	
Delete	

Check Sheet Template Setup Menu

Check Sheet Template Setup Menu

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.

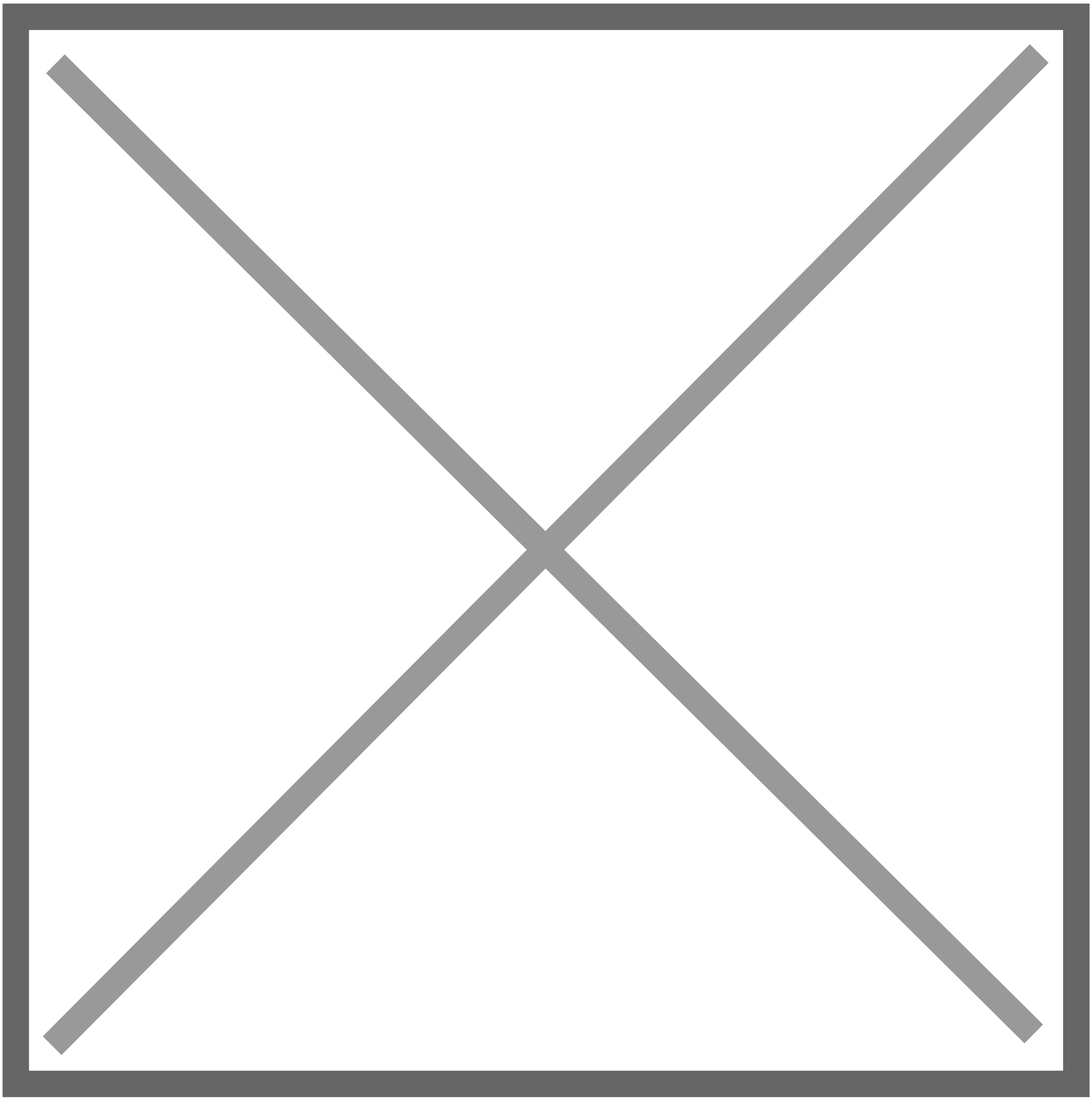
Search button: If the Check Sheet Template Code or the Check Sheet Template Description is

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

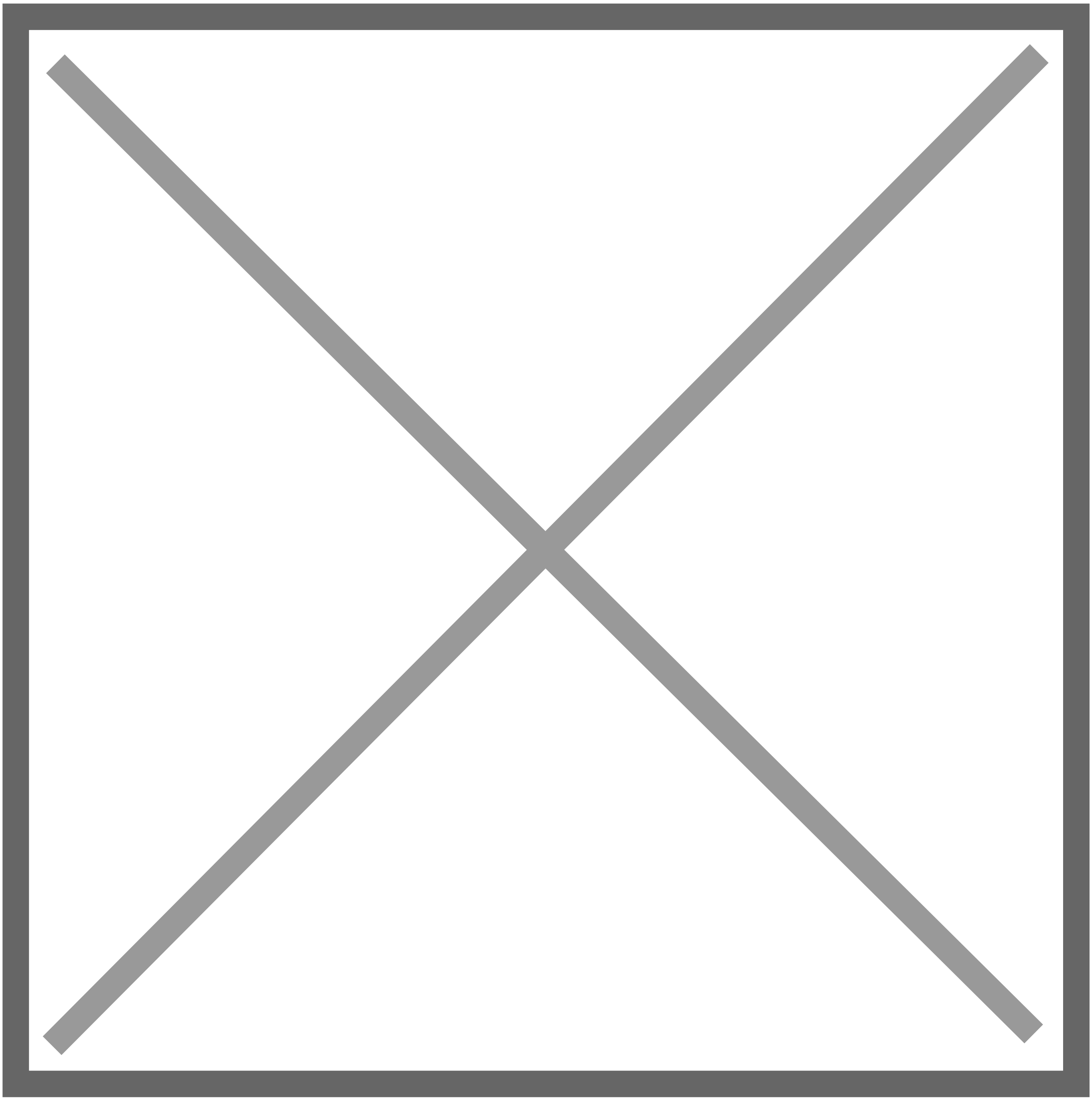
Refresh Grid Icon: refreshes the display grid

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

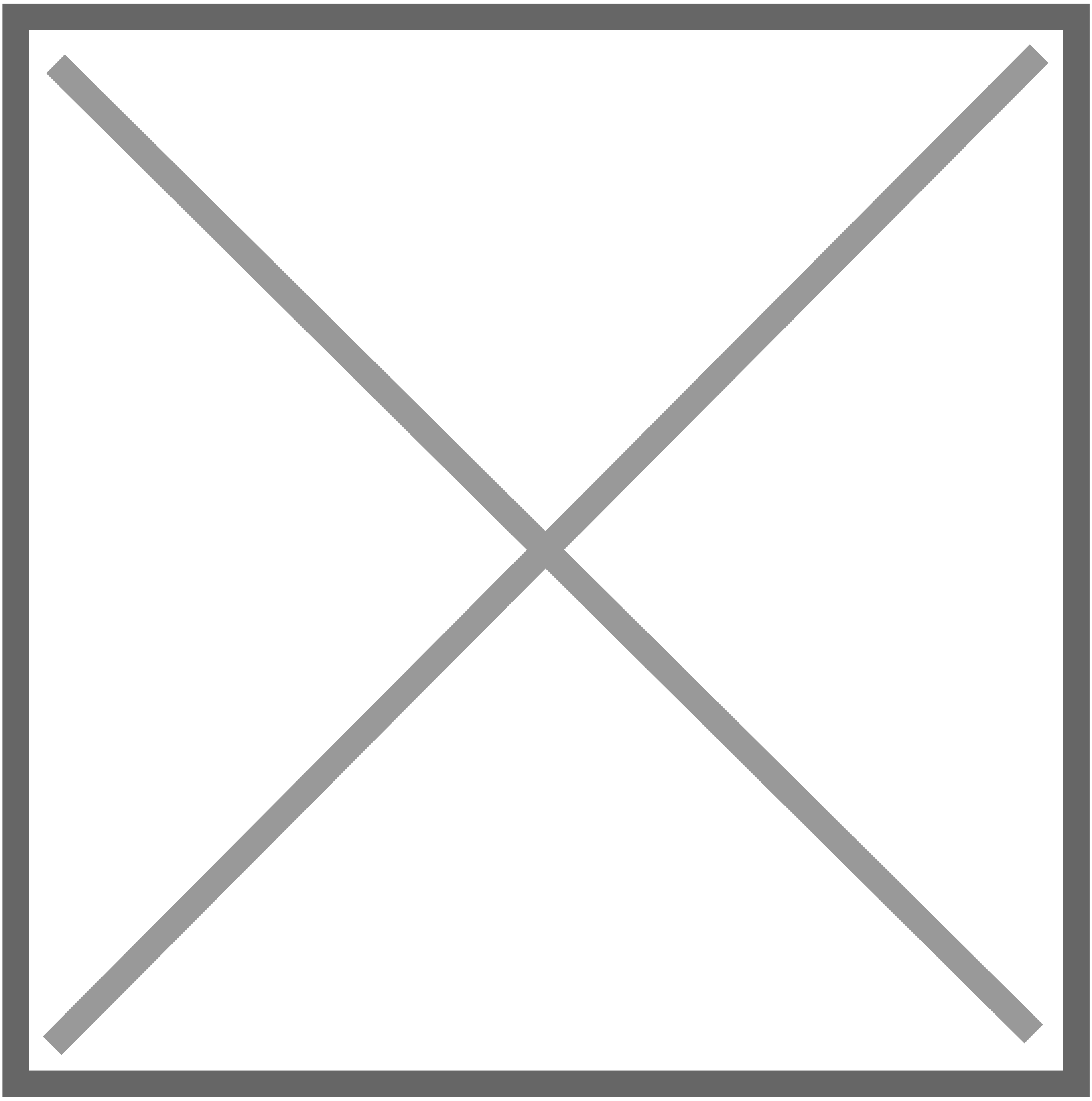


Search button: By inputting in ether the Check sheet Code or Check sheet Description or part there of you can press the search button and all matches will be displayed on the grid.

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

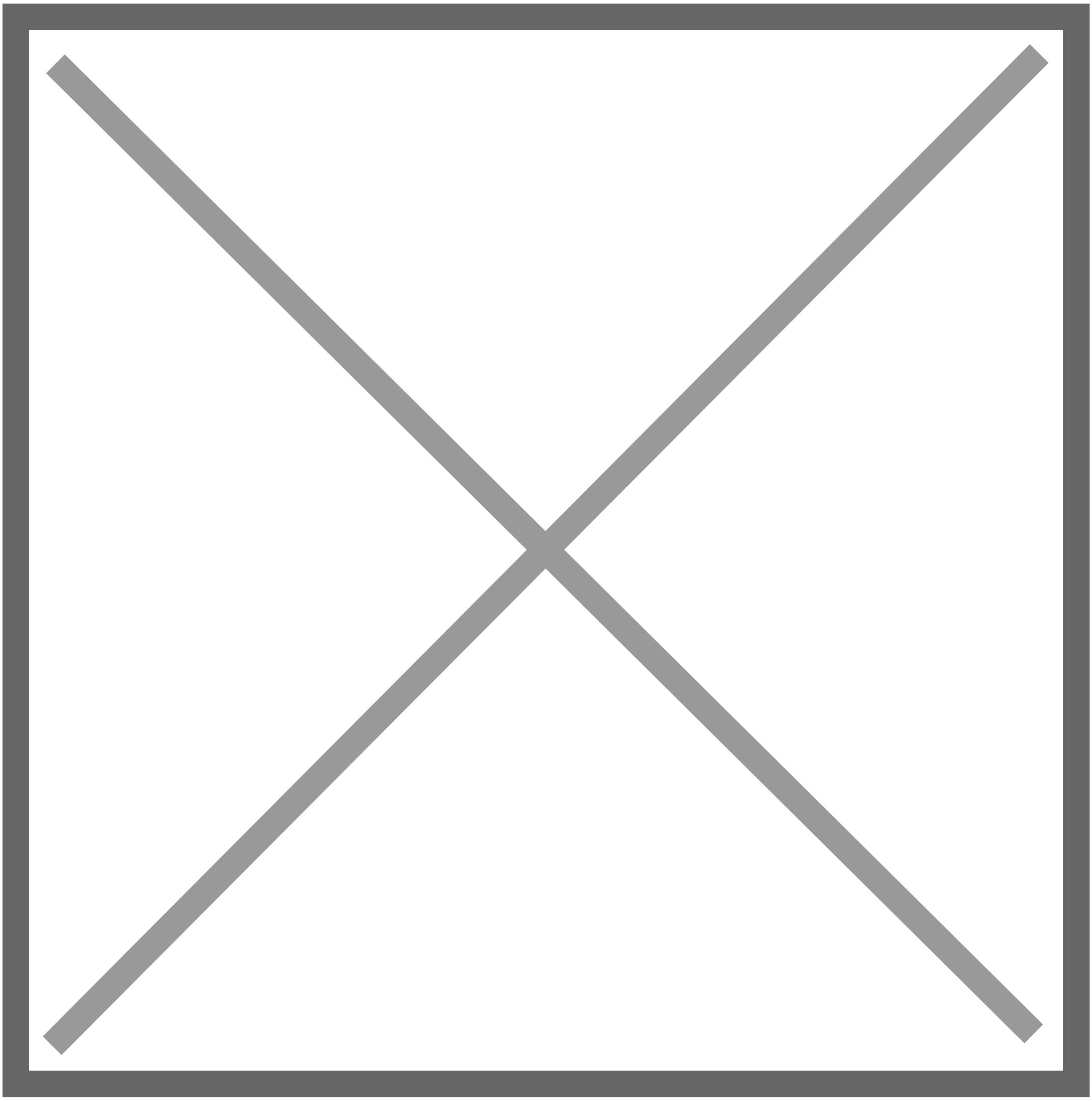
Save and New button: This will save the contents of the window and clear the window for new input.

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

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

Group Item

This window allows you to edit the Check Sheet Group Item

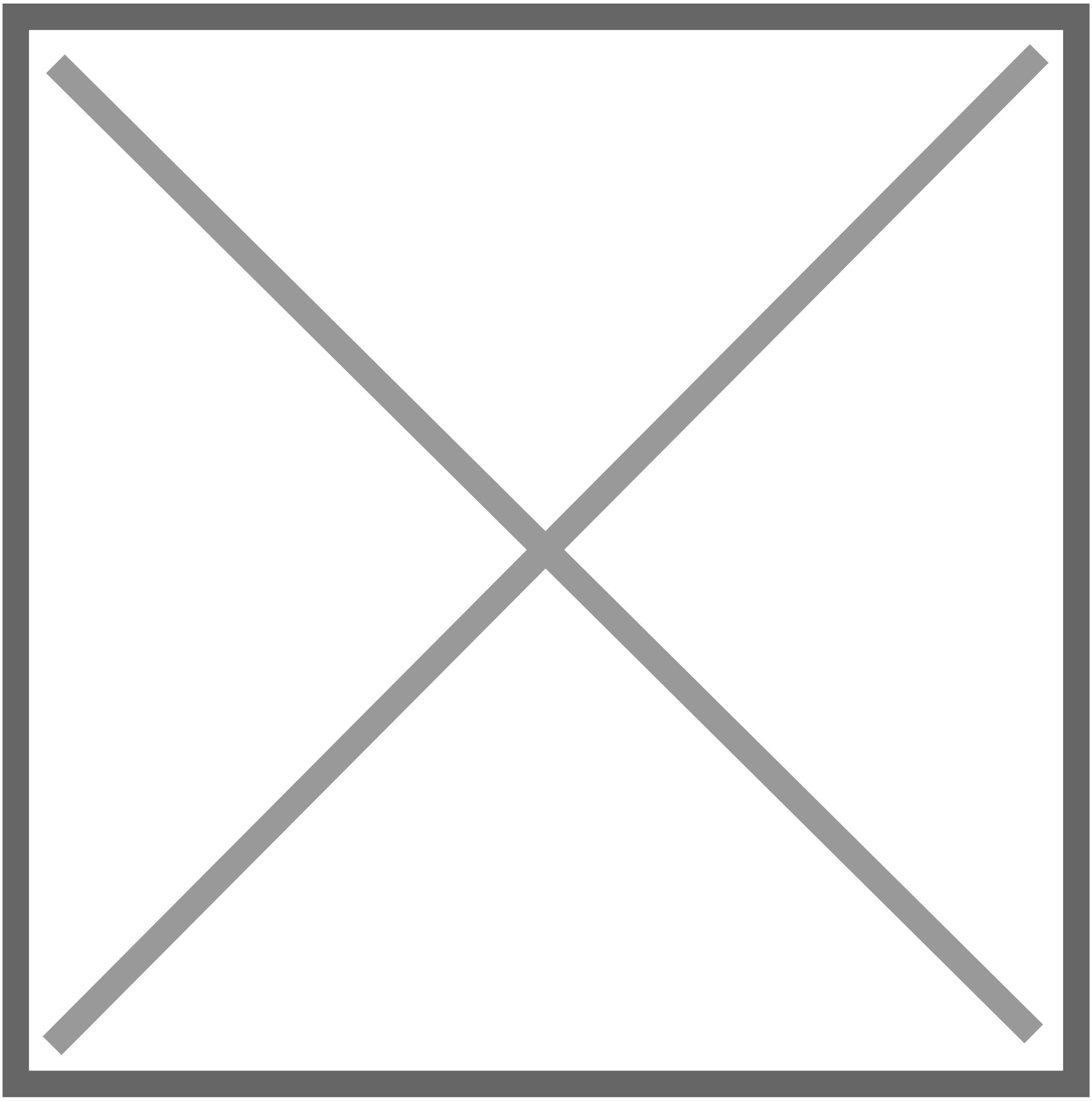
There are three tab options:

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

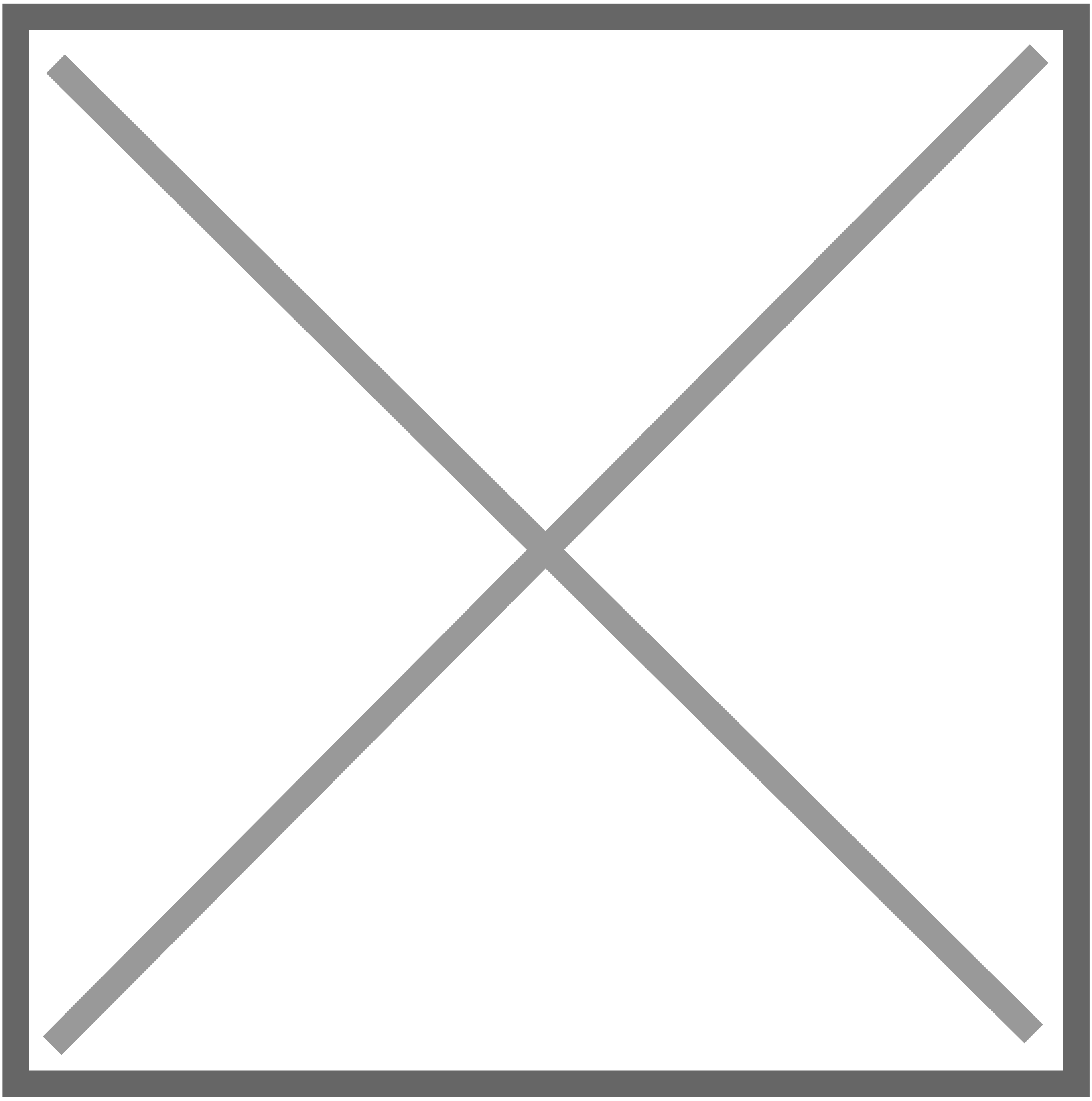
The function of this application is to enable a standard list of questions to be defined which will be used in the Check Sheet Templates where there are more than one selection options available. These options will be listed on the check sheet and the person using the check sheet can mark which option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



Question Setup Tab

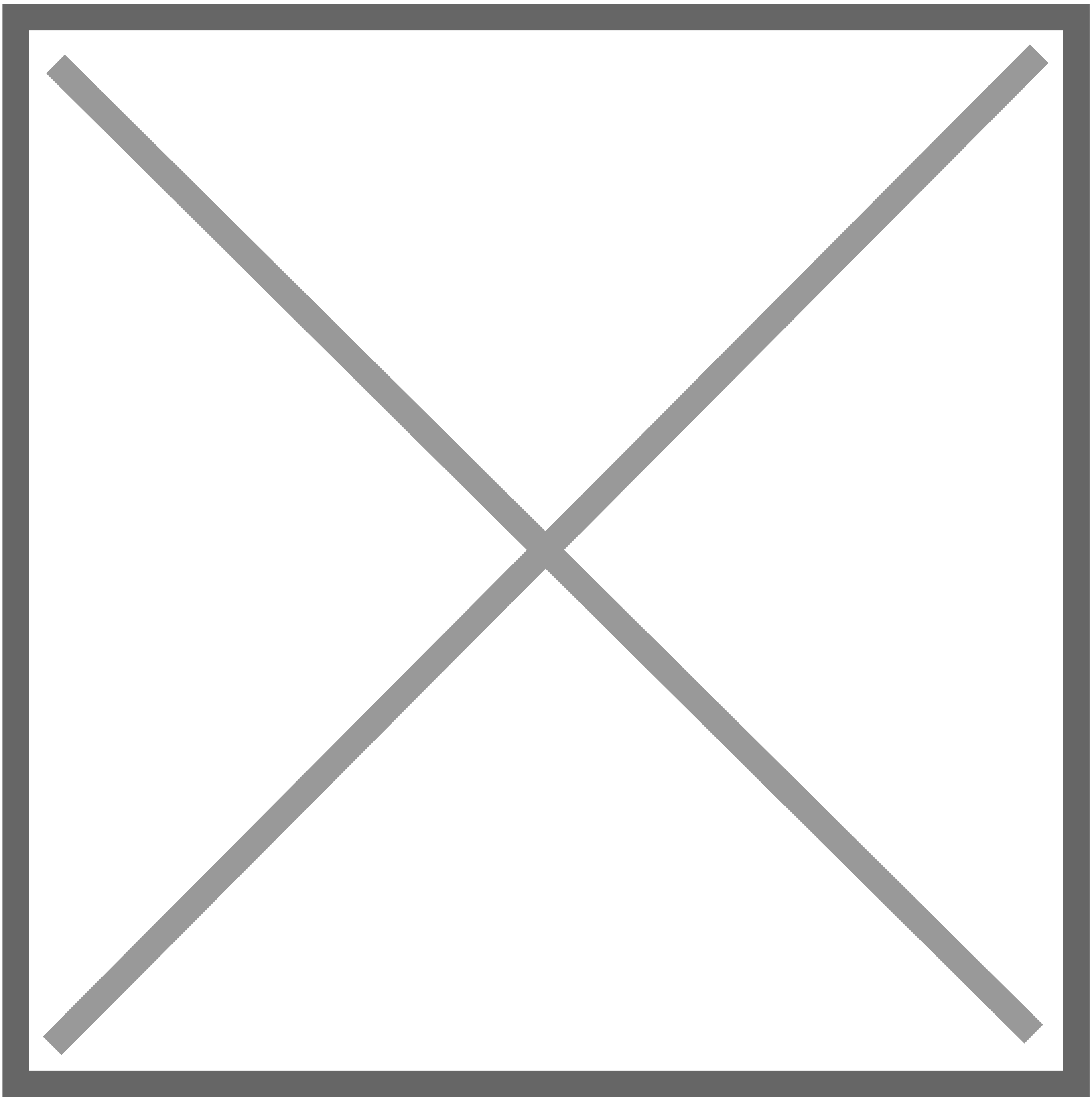
The function of this application is to enable a standard list of questions to be defined which will be used in the Check Sheet Templates where there are more than one selection options available. These options will be listed on the check sheet and the person using the check sheet can mark which option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

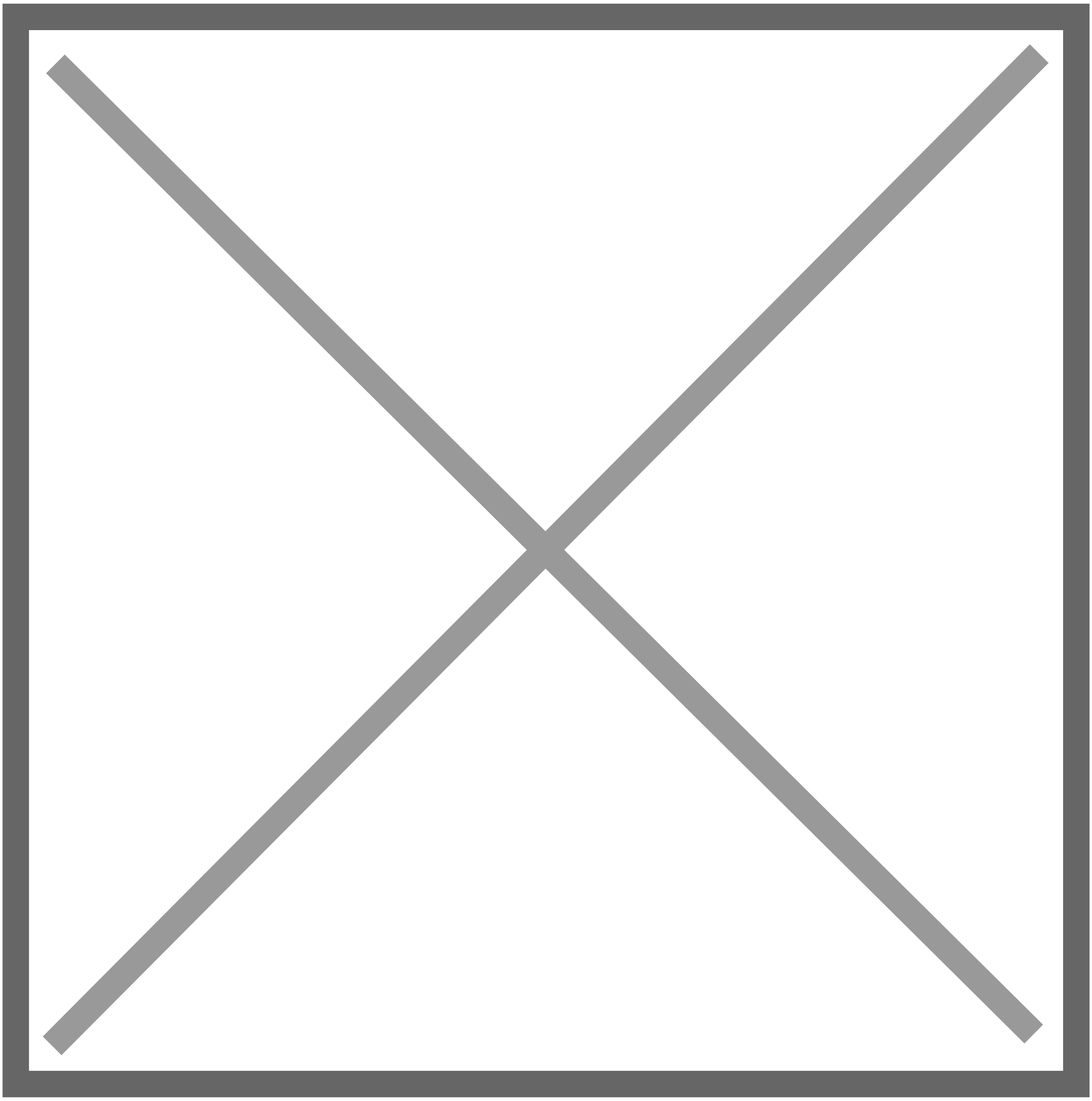


Save: This will save the contents of the window

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



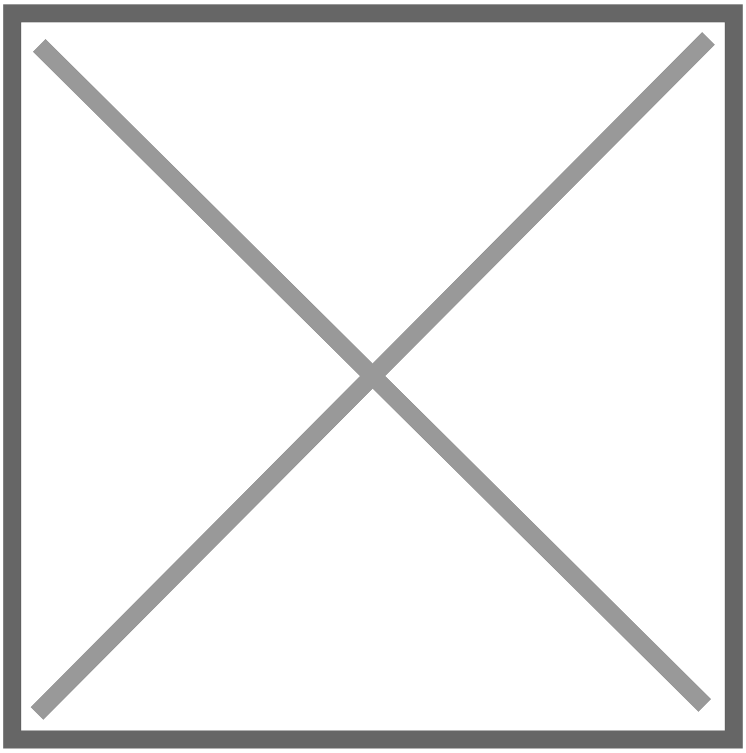
Add button: to insert a new Check Sheet Group.

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

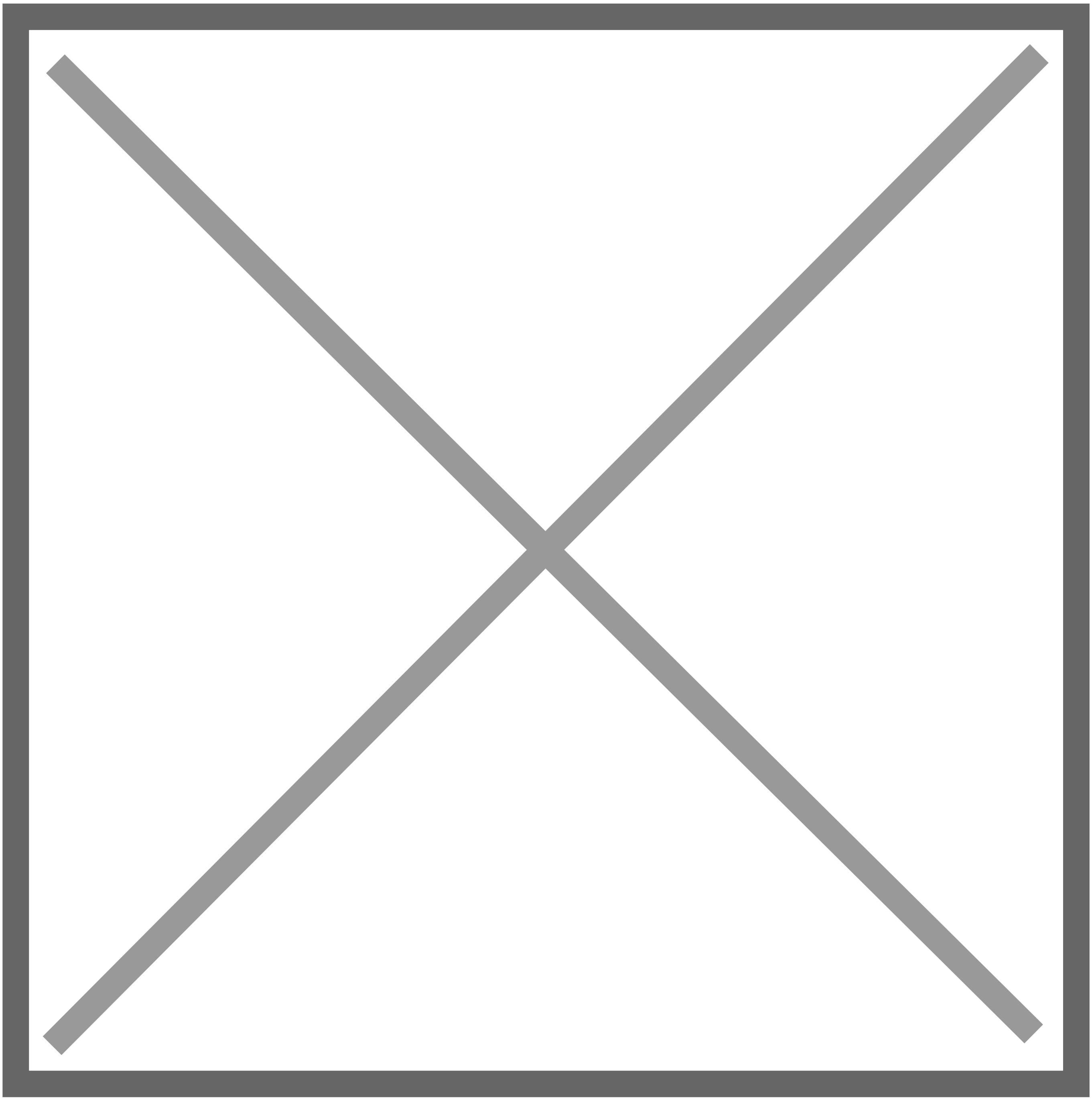
Active: tick the Active tick box is this question option is active

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

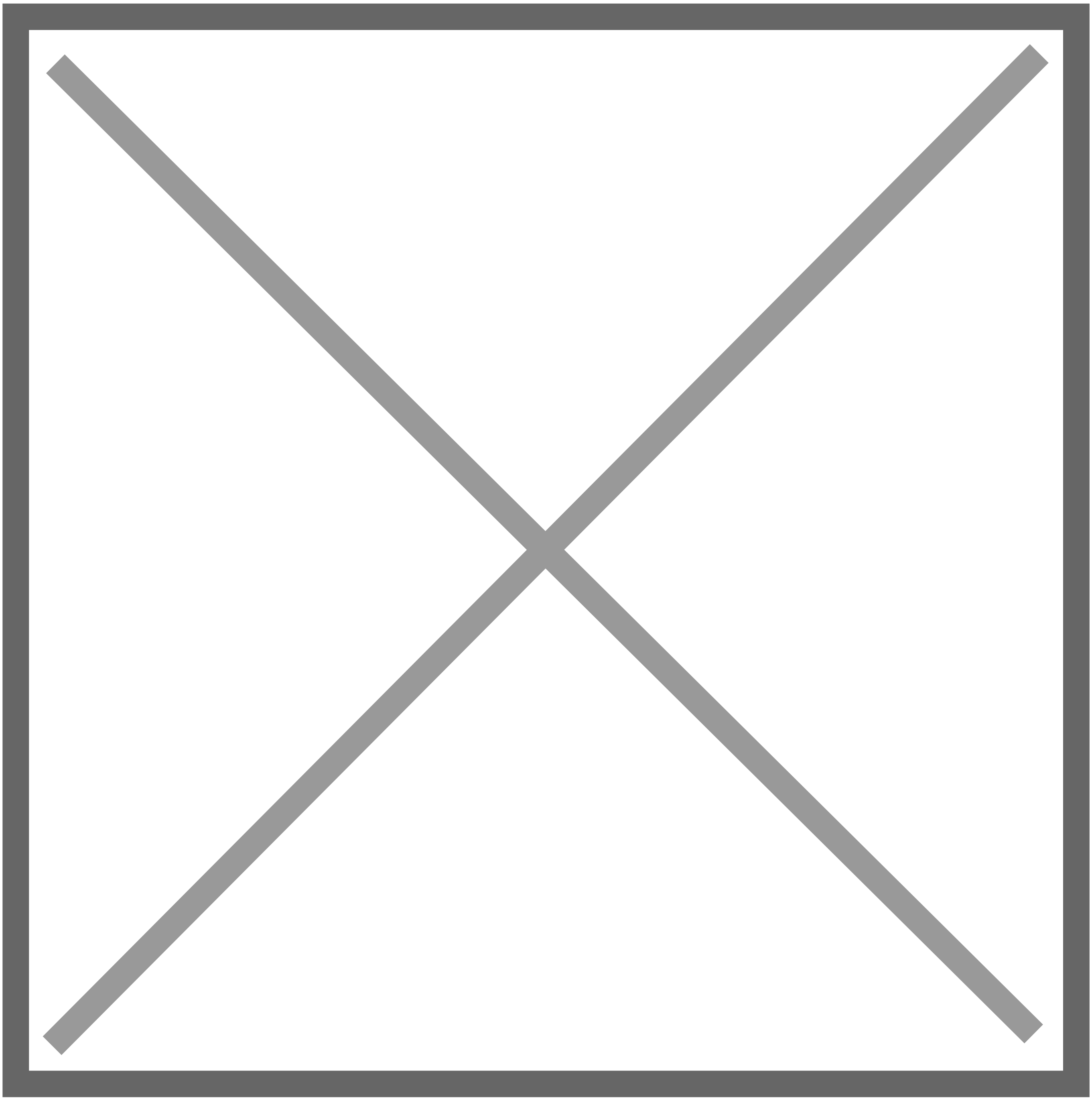
Save and Close button: this will save the contents of the window and close the window.

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

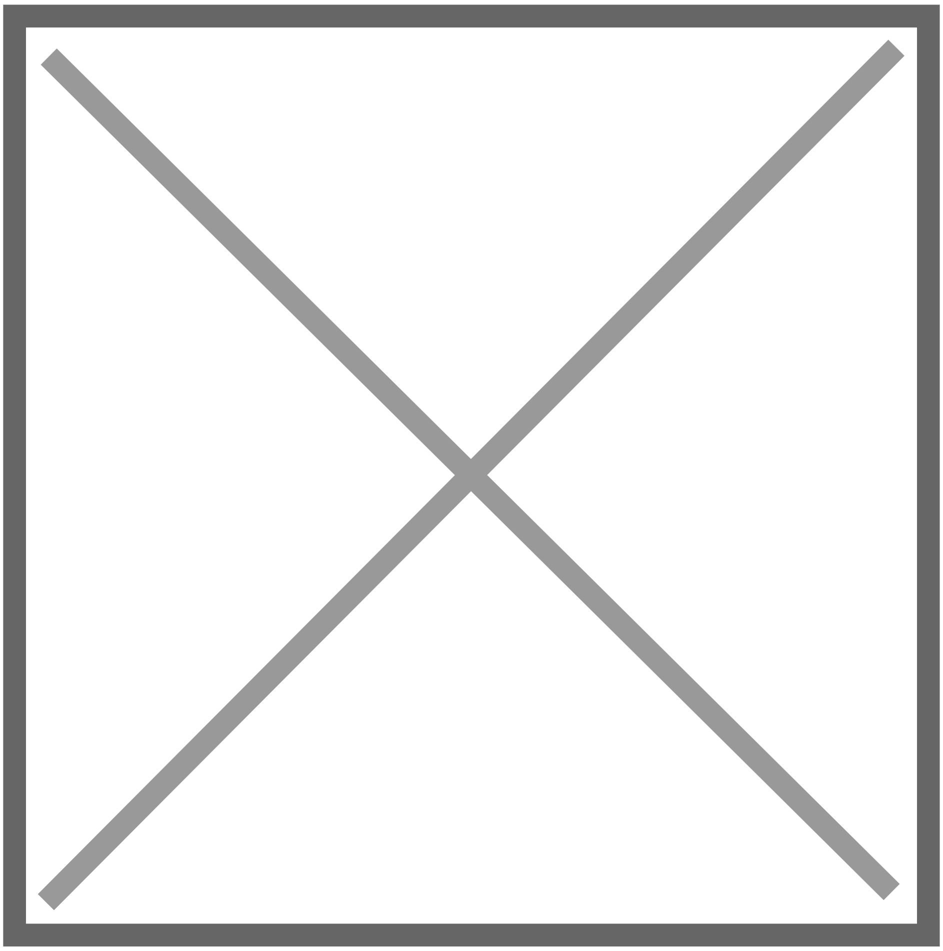
Close button: this will close the window and will not save changes



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.

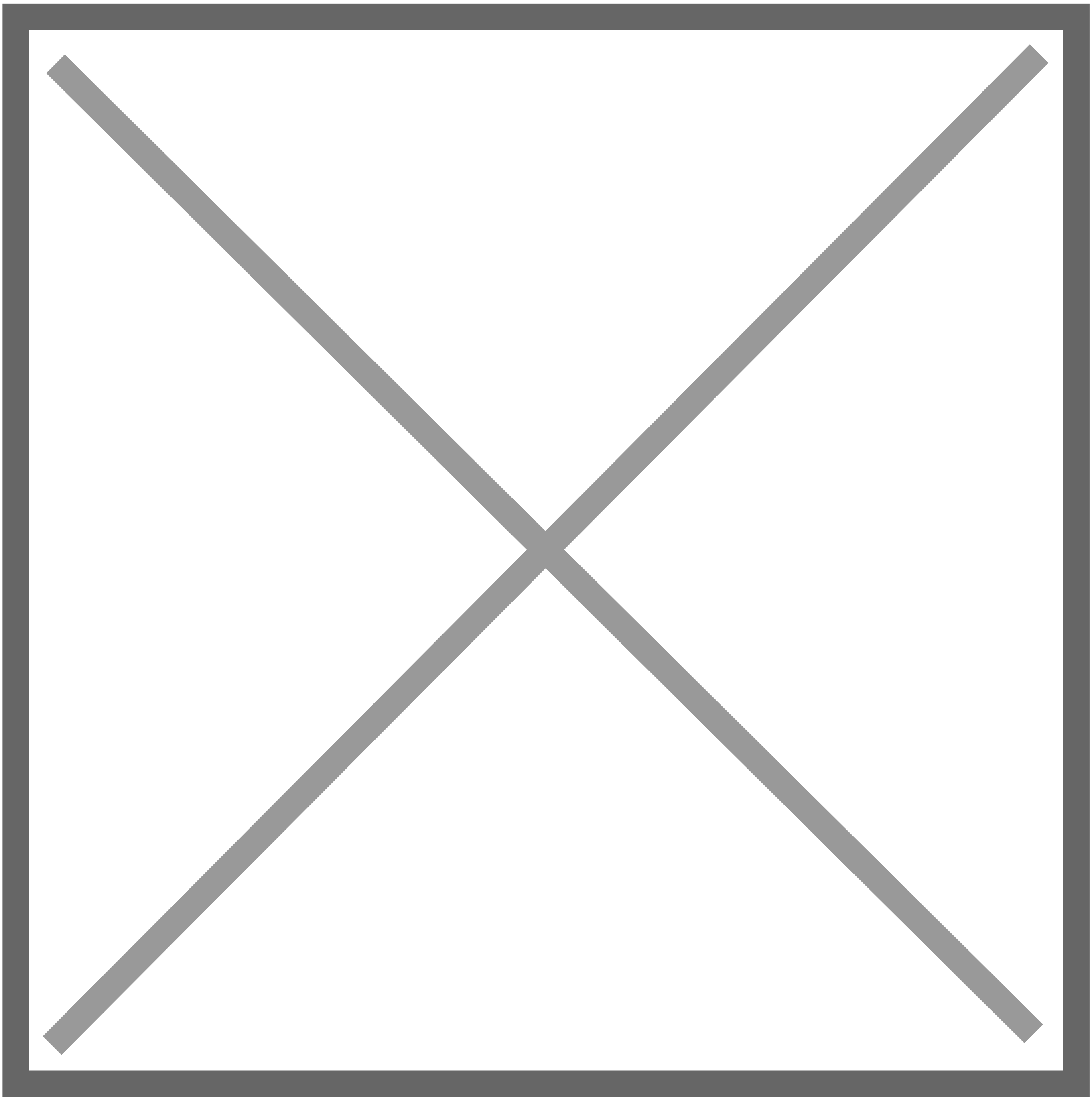
Save button: this will save the contents of the window.

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

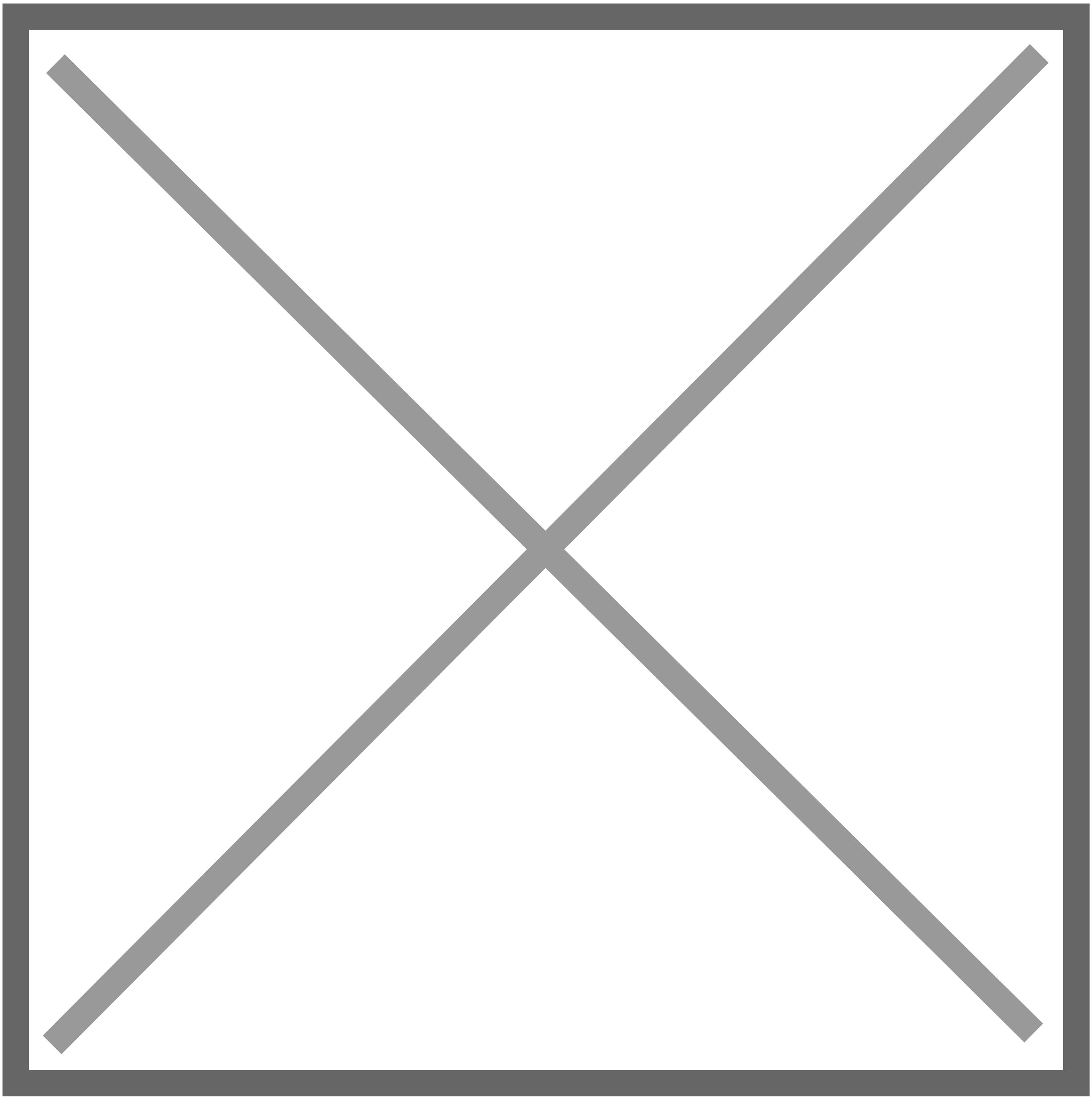


Pre Inspection Check Sheet - JC

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:

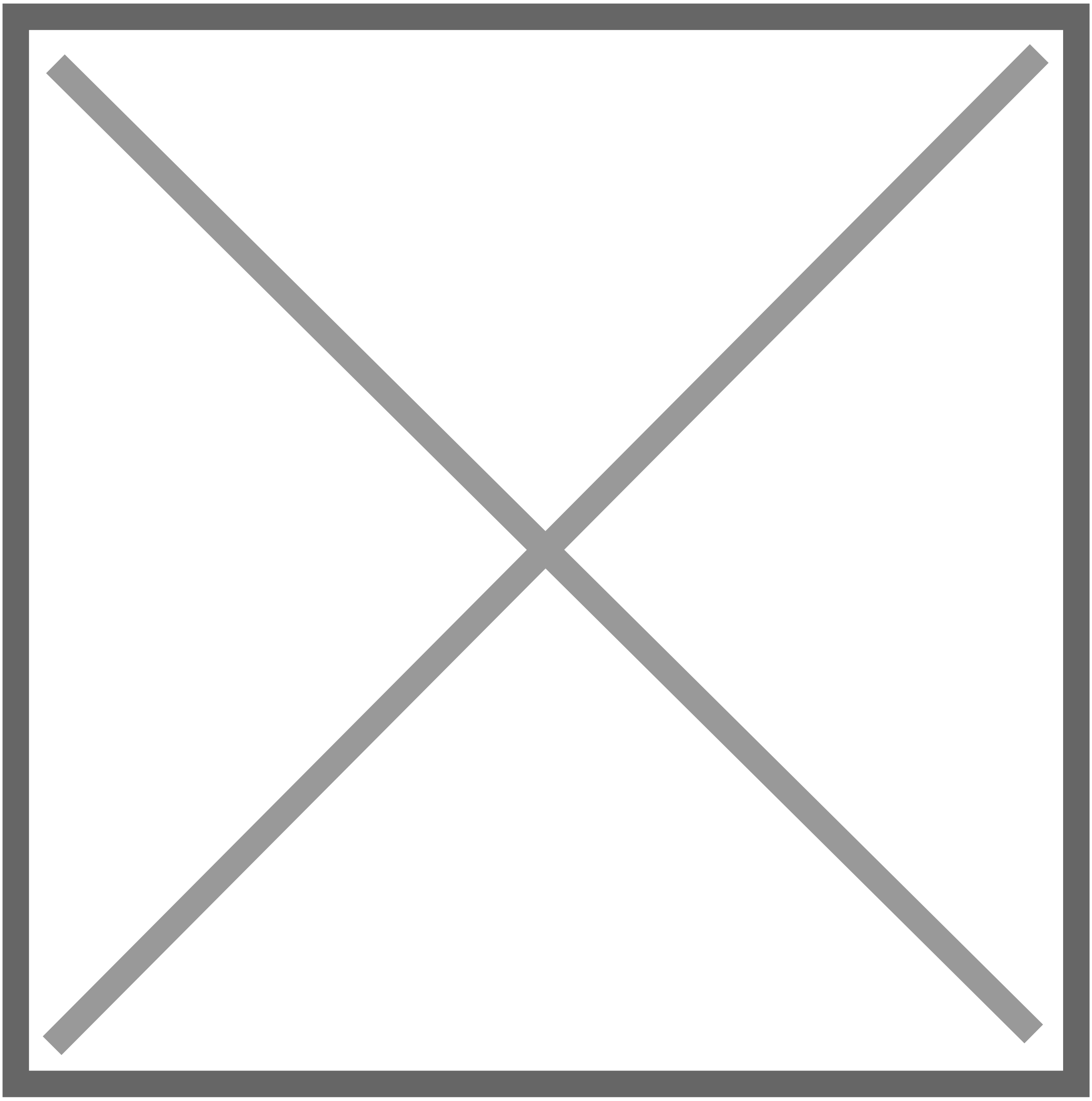
Job Quote:

Debtor Quote:

Security Icon: Manage form security

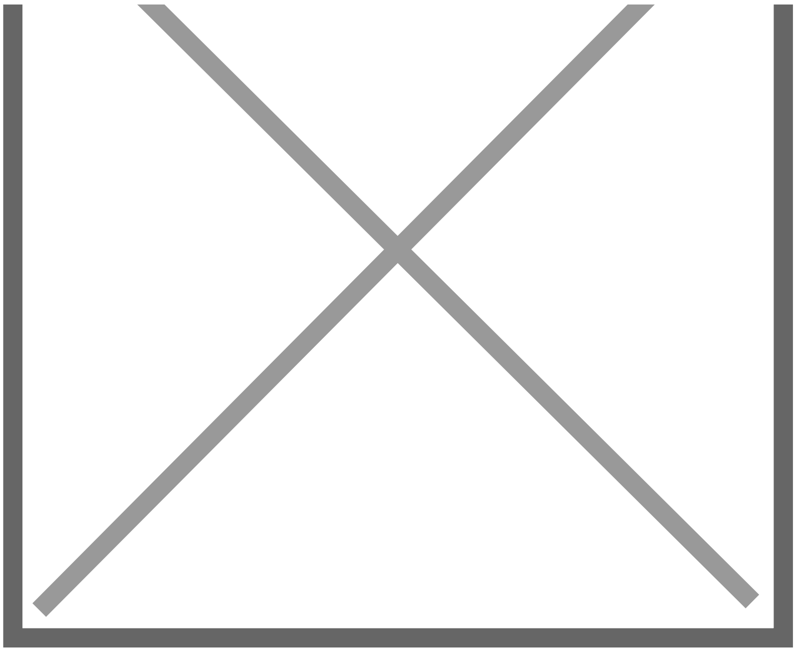
Refresh Grid Icon: Refreshes the display grid

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

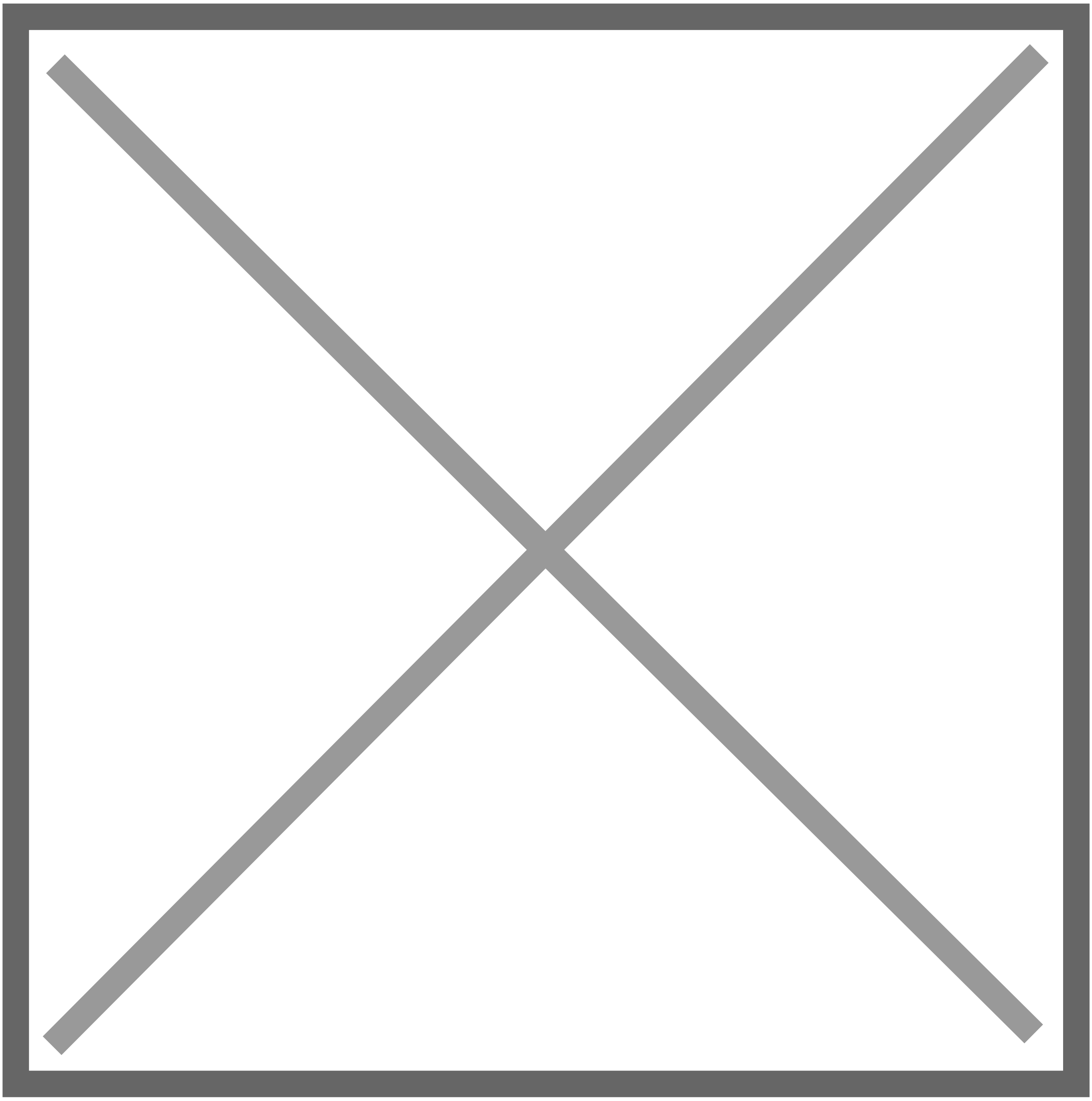
Custom Fields tab: this tab allows you to use custom fields to the Pre Inspection Checksheet

Standard tab

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

Standard tab

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

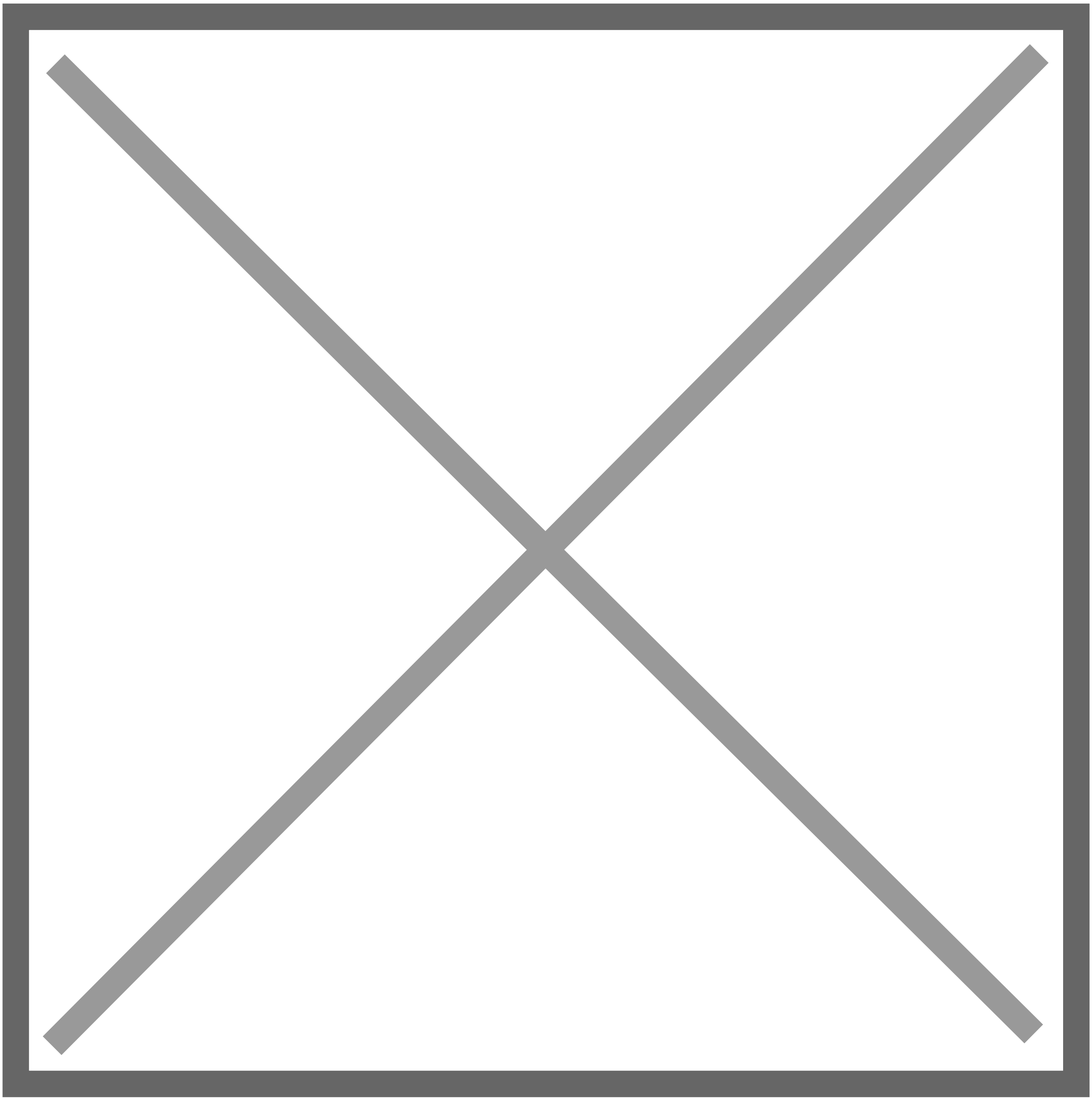


Save button: save contents of form

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

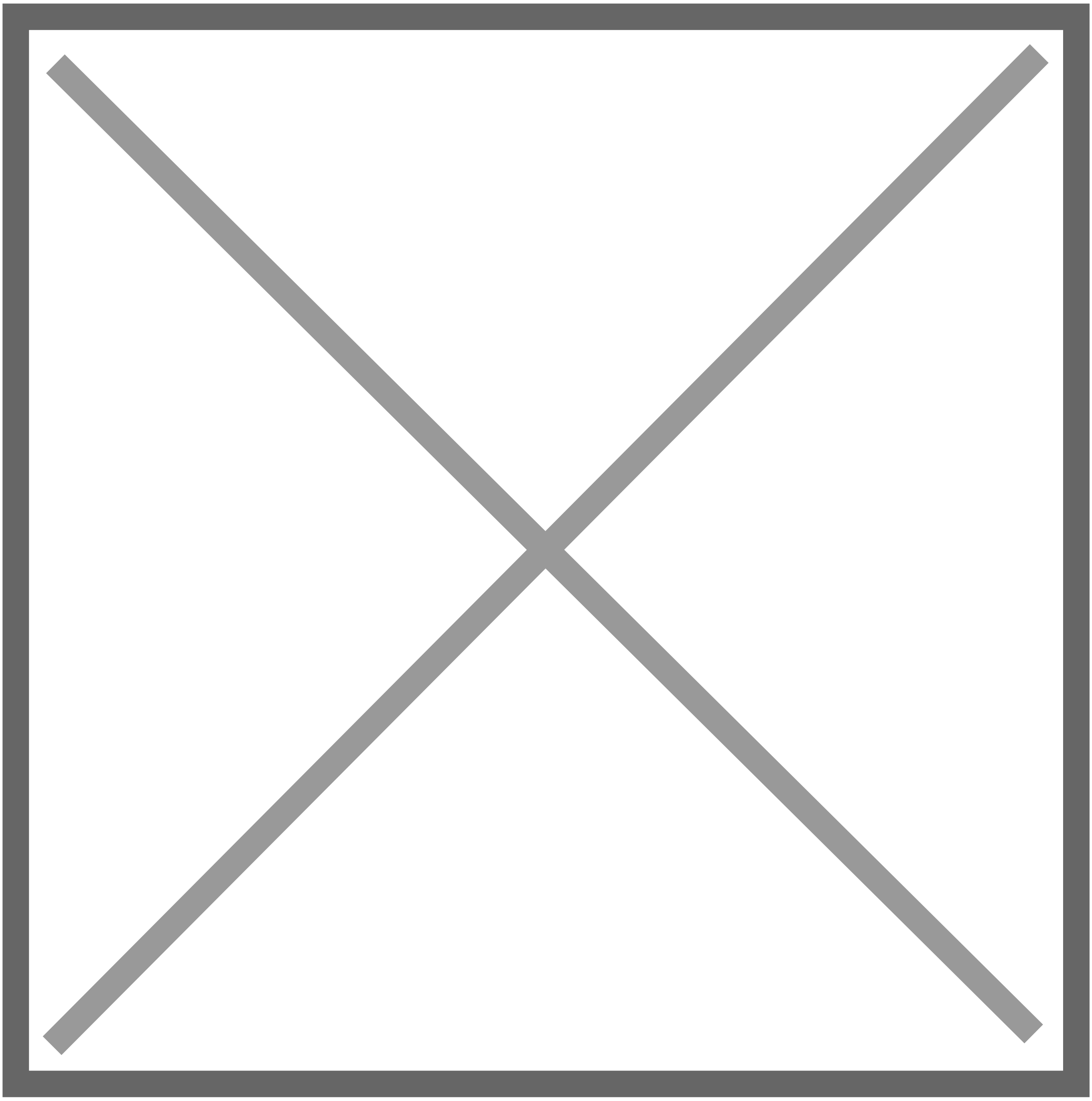


Save button: save contents of form

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



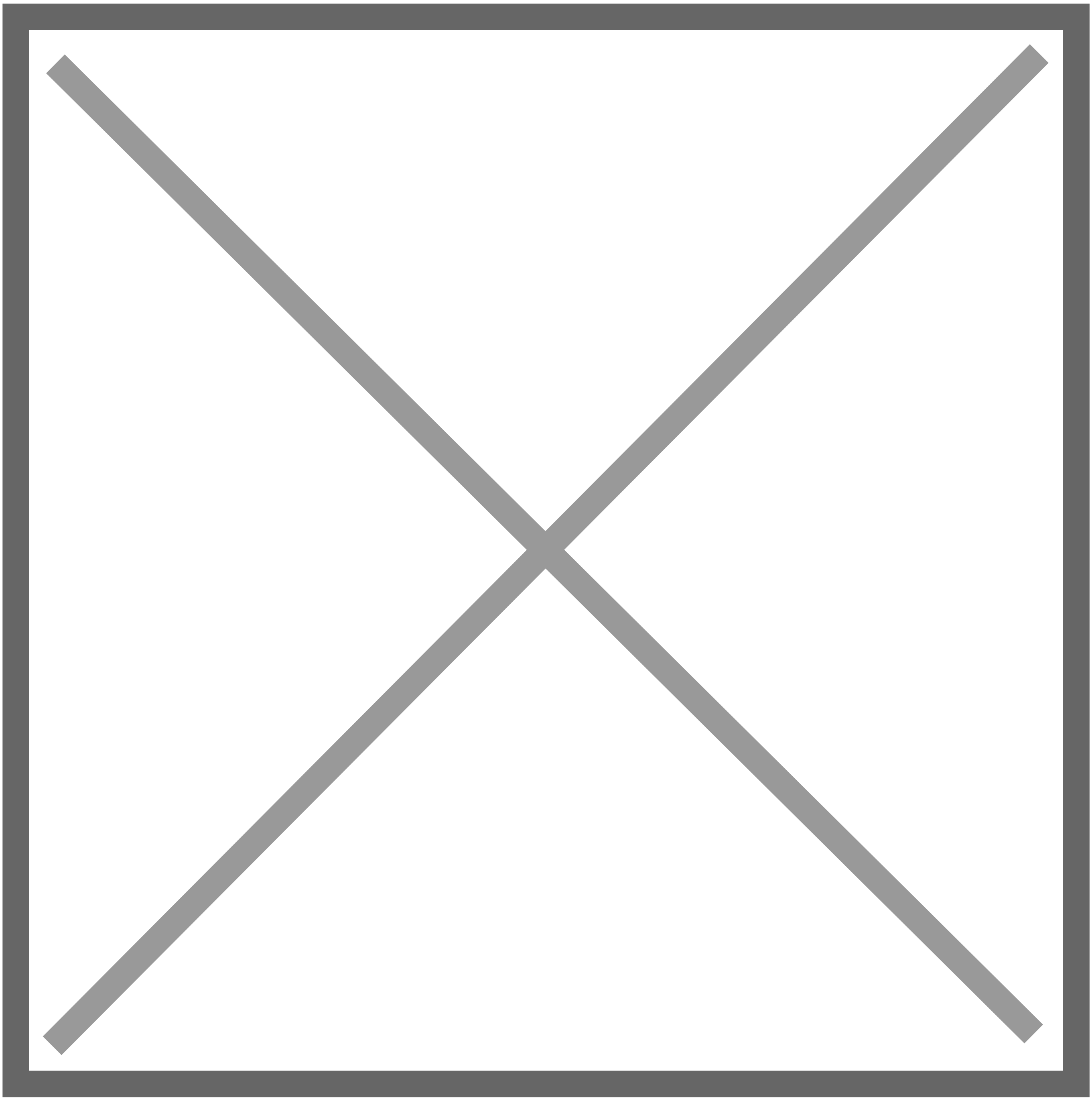
You first need to add a note then save the note

Save button: save contents of form

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

Custom Fields tab

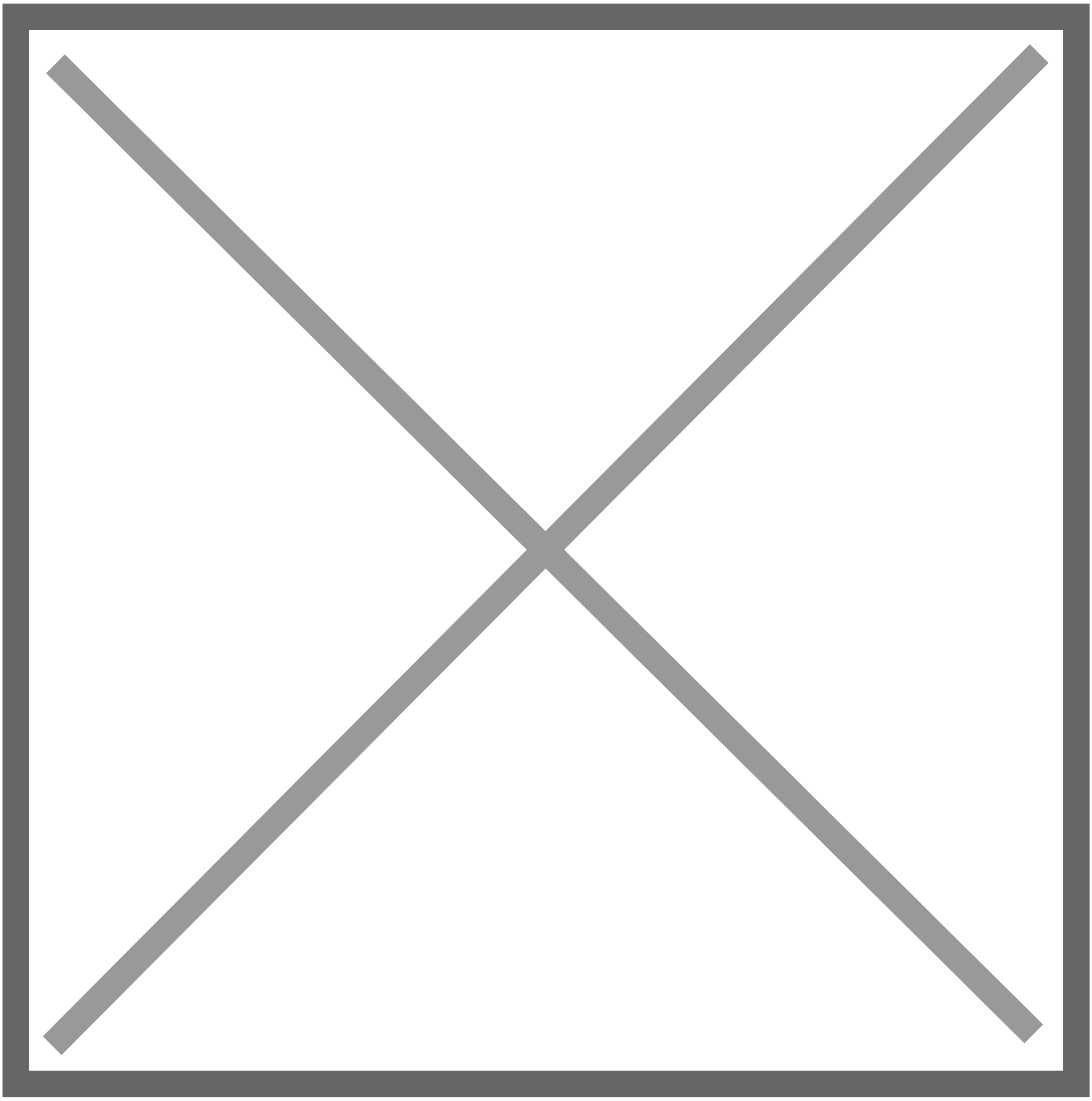
This tab allows you to use custom fields to the Pre Inspection Checksheet



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



Expense Setup Menu

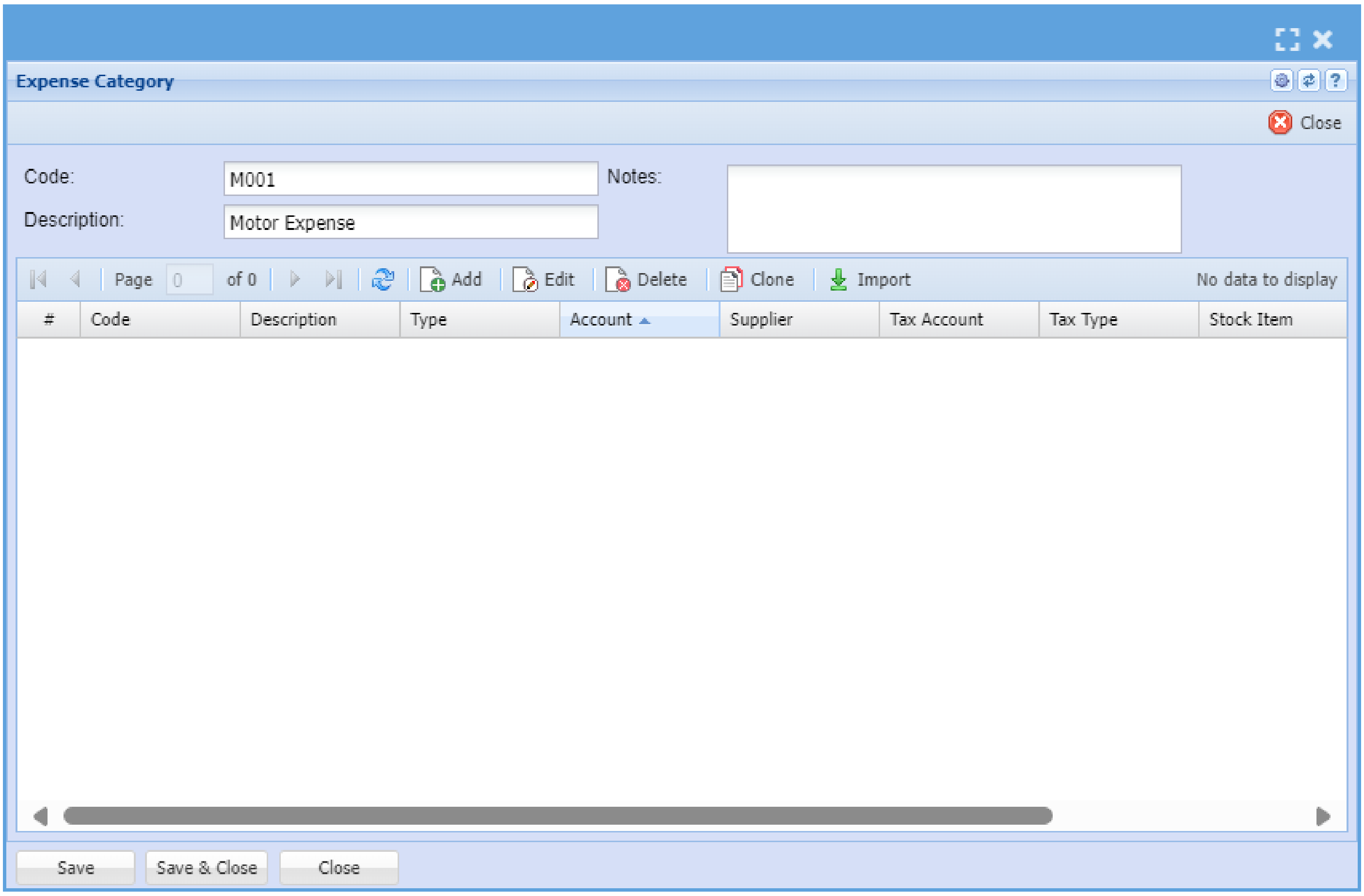
Expense Add

Expense setup allows you to create expenses to be used by your team for GRV and Journal transactions

CRM Module> Configuration> Expense Setup

Expense Category

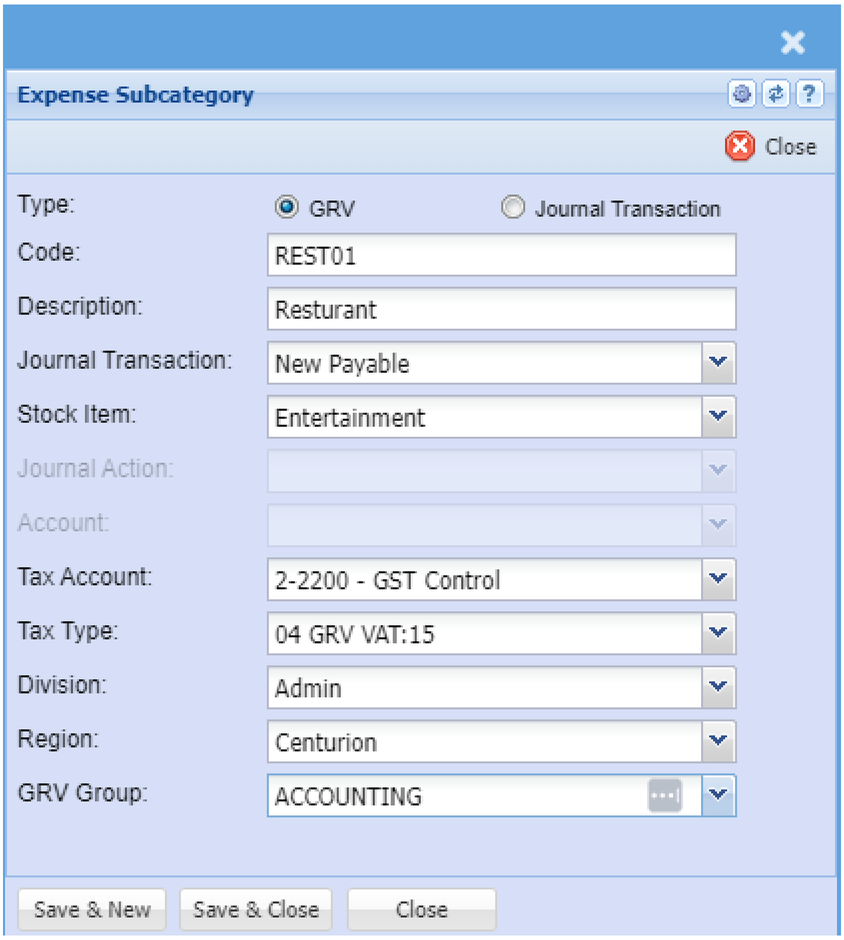
Expense category allows you to create a main group for the expense



Code	
Description	
Notes	
Grid	

Expense Subcategory

This allows you to add all expenses related to the expense category



Type	
Code	
Description	
Journal Transaction	
Stock Item	
Journal Admin	
Account	
Tax Account	
Tax Type	
Division	

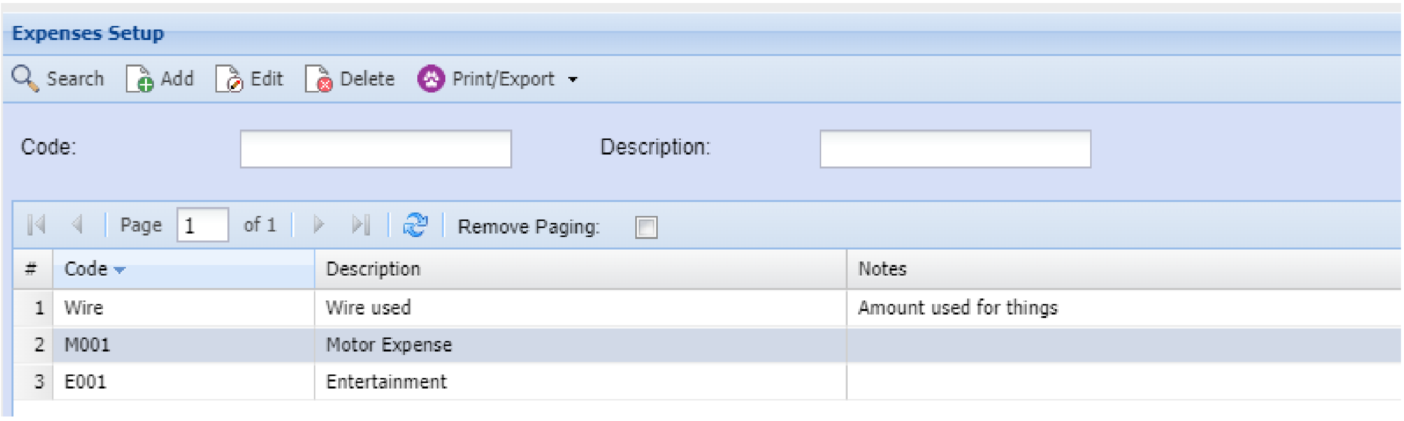
Region	
GRV Type	

Expense Setup Search

This screen allows you to search for a expense set up

> If you don't put filter your search this will bring up expenses

CRM Module> Configuration> Expense Setup

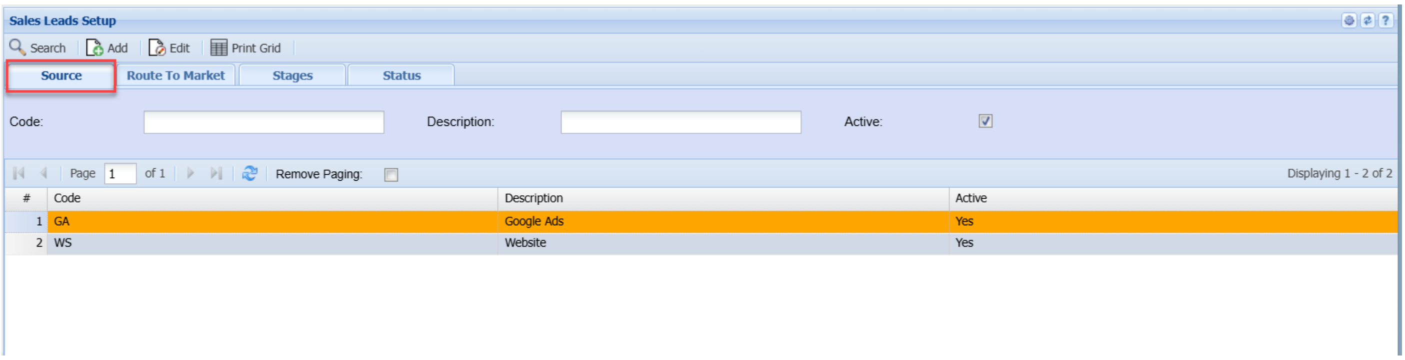


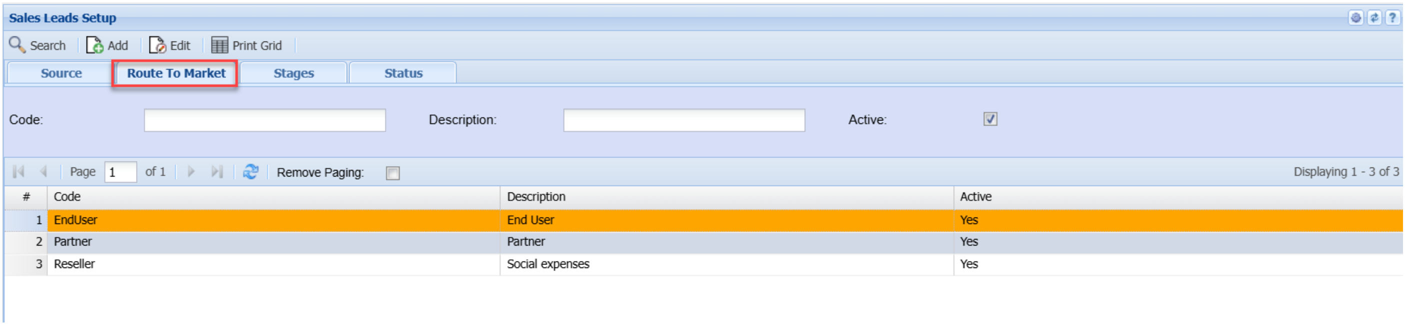
Code	
Description	
Print/ Export	

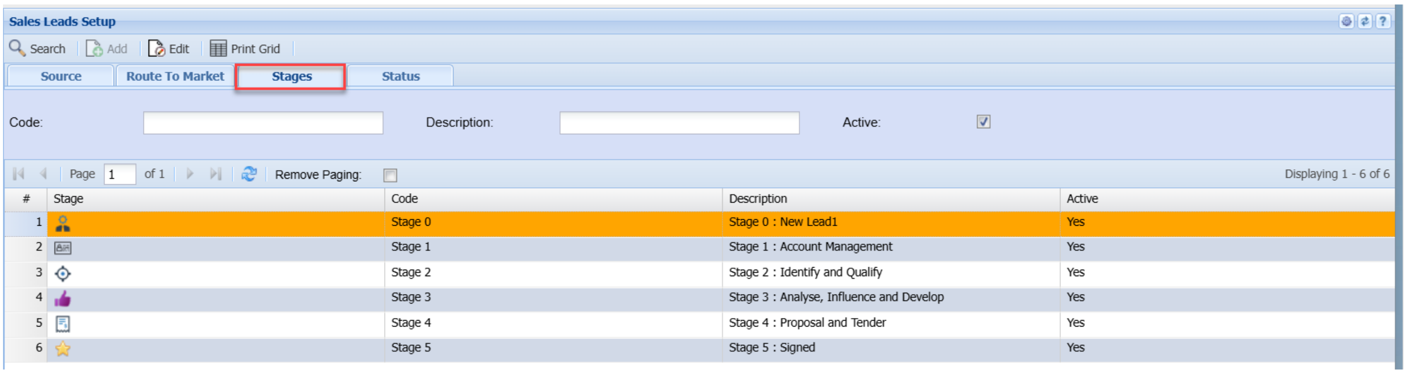
To add a new expense category or to edit an existing one [click here]

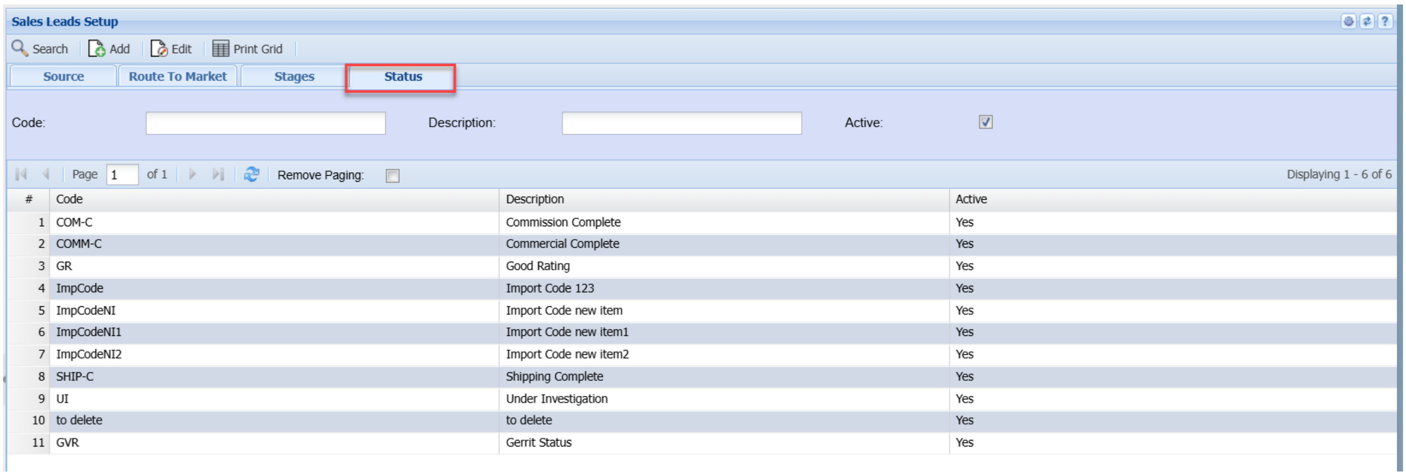
Sales Leads Setup

Sales Leads Search



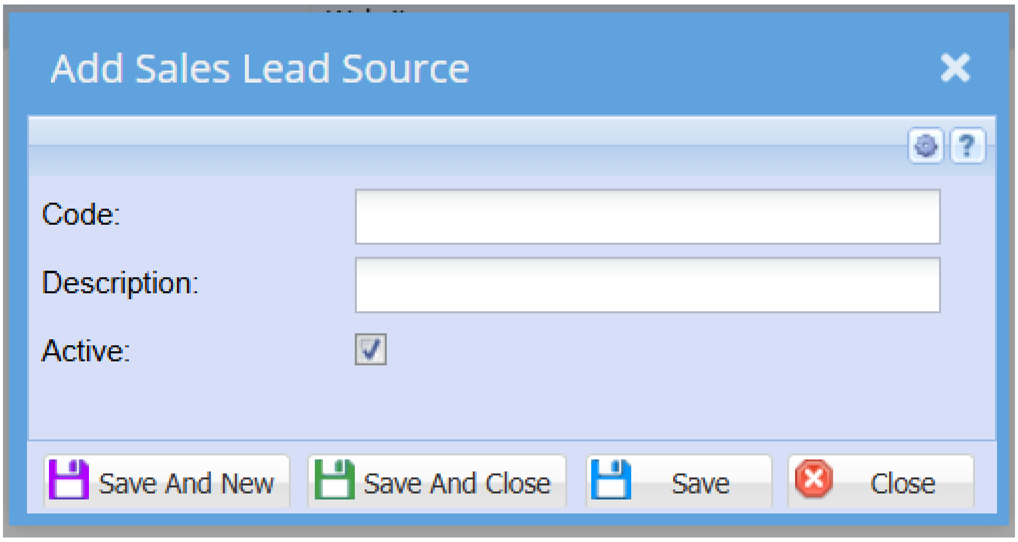




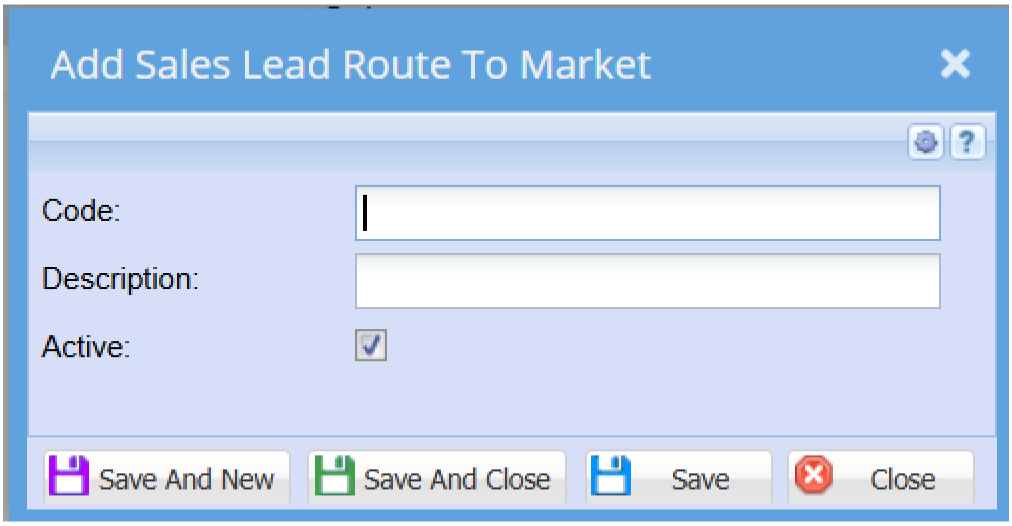


Sales Leads Setup Add

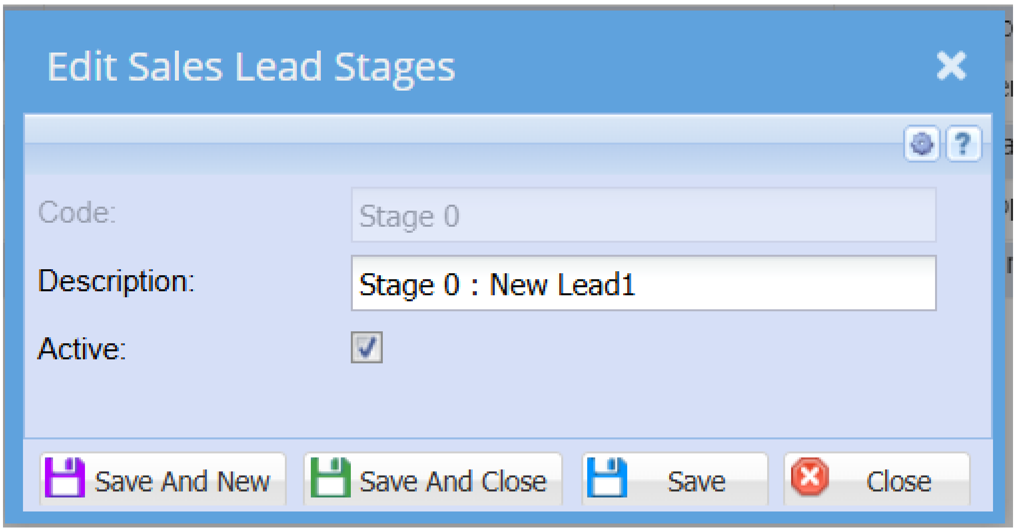
Source Tab Add



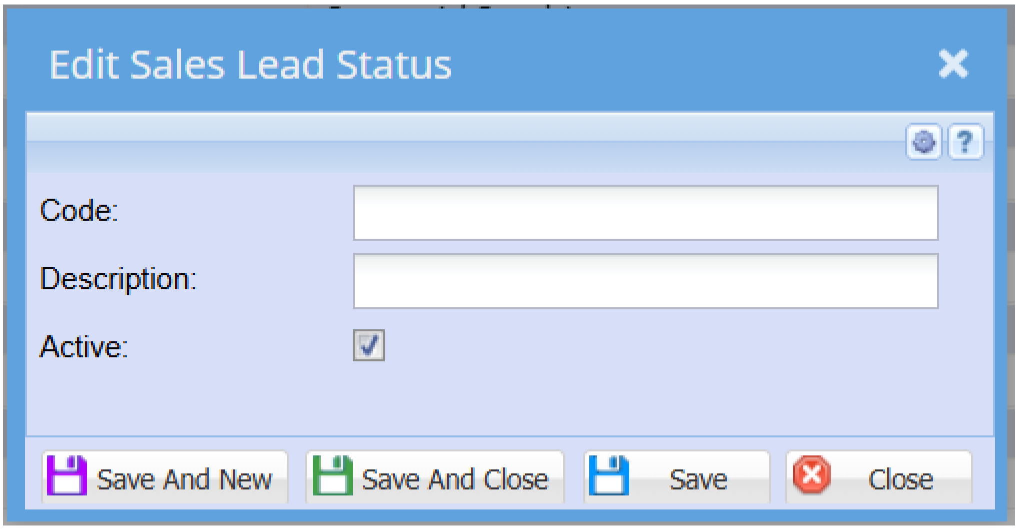
Route To Market Tab Add



Stages Tab Add



Status Tab Add



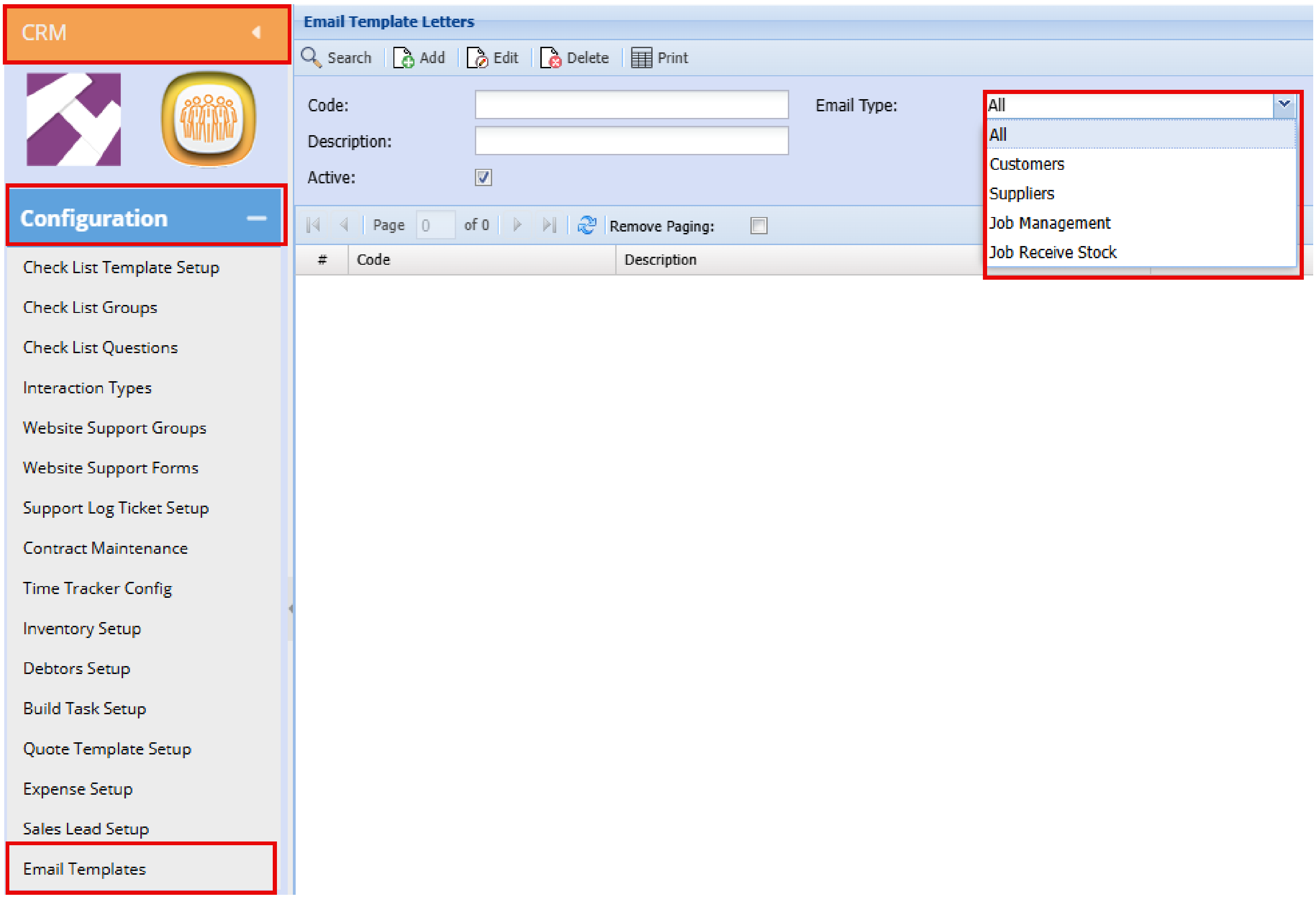
Email Template Letters

Email Template Letter Setup

Email templates are **set up and maintained by the customer**. The system does not provide pre-configured content. Customers are responsible for creating, updating, and approving all email wording, layout, using the appropriate placeholders.

There are **Five email template options**, each used for a different part of the system.

CRM > Configuration > Email Template



1: Customers:

This option is used for **Customer Batch Email Out**.

Bulk Email Template Setup

Email templates for **Customer mail-outs** are designed, created, and managed in the **CRM Module**

- Customer mail-outs uses a customer contact list that can also be customized.

[Creating a customer mailing]

2: Suppliers

This option controls emails sent to **suppliers**.

Email Template Setup

Email templates for **Supplier mail-outs** are **designed, created, and managed in the same location as customer Emails** within the system and for email type you will select Suppliers.

> Uses a separate template specific to supplier communication

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3: Job Management

This option is used for emails generated through the **Job Management** and are designed, created, and managed in the **CRM Module**.

4: Job Receive Stock

This option is used when emails are sent during the **Job Receive Stock** process. **Job receive Stock** email templates are designed, created, and managed in the **CRM Module**

For the email to be triggered, stock items must be correctly configured with the appropriate setting enabled.

[Stock Item Setup]

- This email is triggered when stock is received against a job

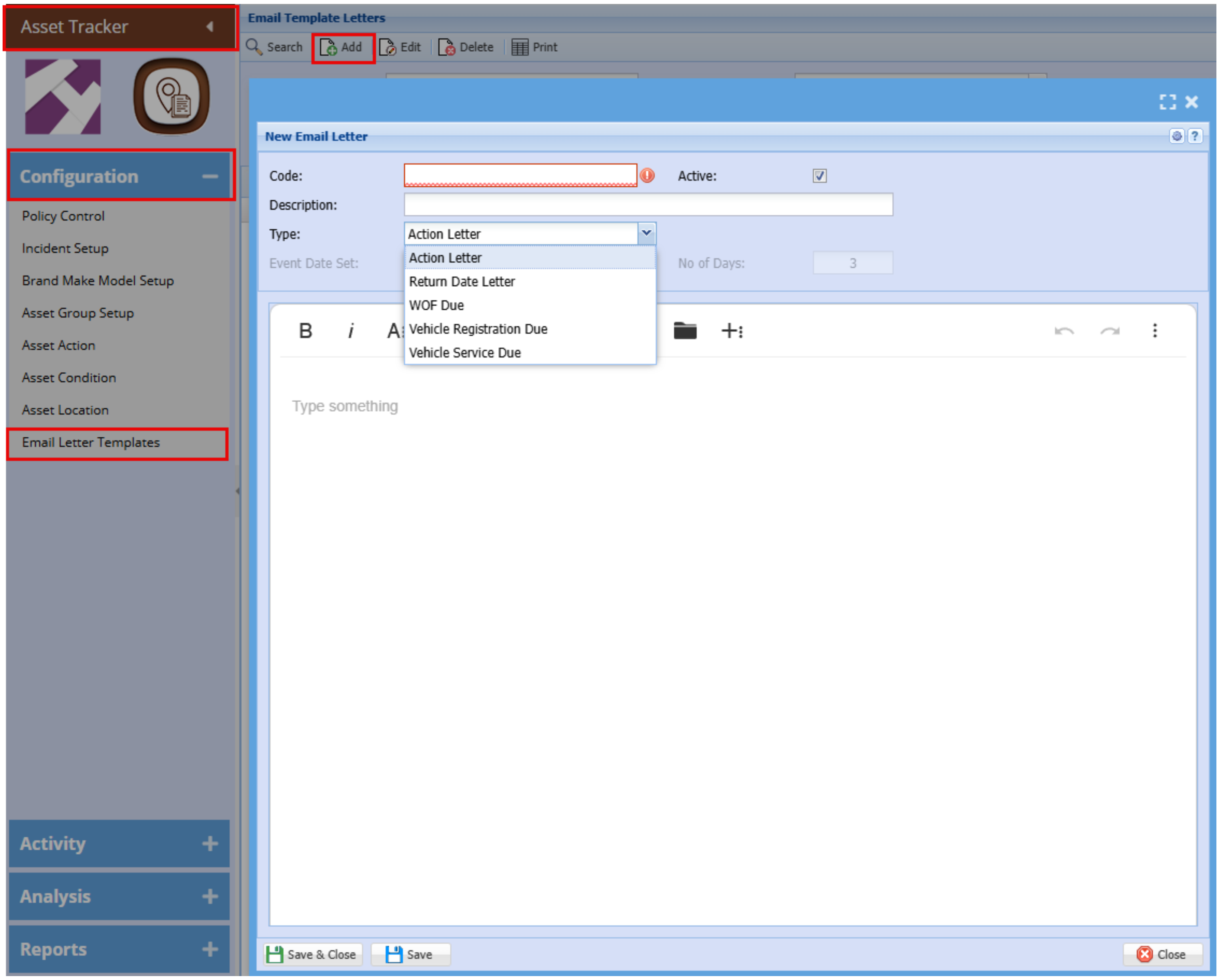
5: Asset Email Out:

This option is used for **Asset Email Out via the Webatar App**

Asset Tracker > Configuration > Email Letter Template

These emails can be Scheduled as needed for Asset Allocation, Service dates, Return dates etc.

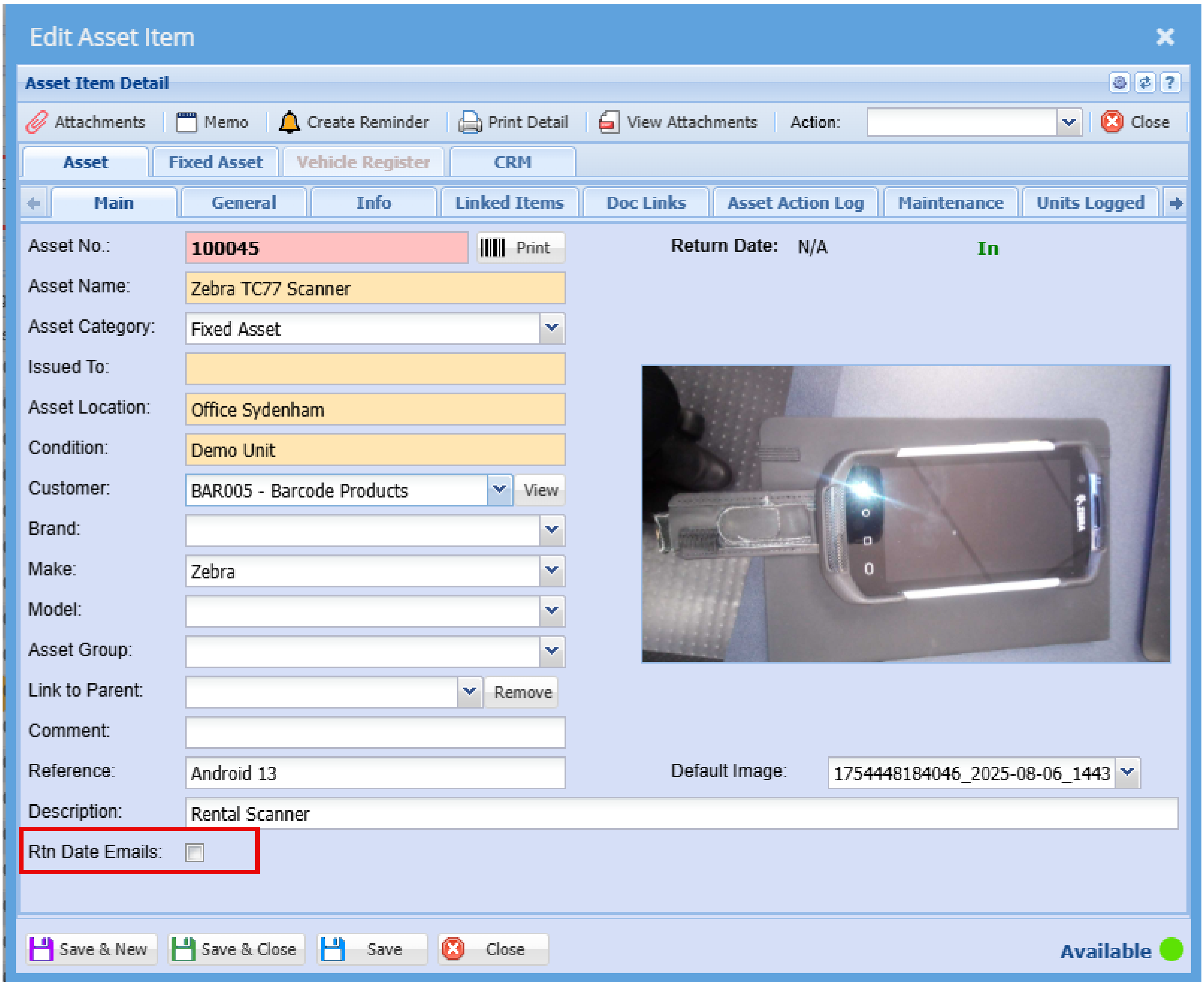
[Asset Email out Setup Manual]



Email templates for **Asset Actions** are **designed, created, and managed within the Asset Module**

- Asset mail out are sent to the specific staff member being allocated the asset through the Webatar App.

- To activate the Mail out for each item the **"Return Date Email"** checkbox needs to be ticked at bottom of the **Asset Information** page, tick the **"Return Date Email"** checkbox to activate this mail-out.



Email Template Letter Place Holders

Place holders used in Email Template

Customer Bulk emails

Supplier Bulk emails

Manage Job

Job Receive stock email

Job Checklist email assign to

Assign to employee	
Job Description	
Asset Number	
Asset Name	
Checklist Number	
Checklist Description	