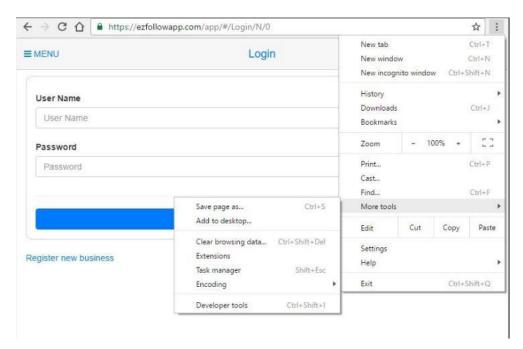
Set up	2
Create a shortcut on your desktop	2
Setup your company details	3
Update the company general details	3
Update the company counters	3
Update the company statuses and types	4
Create/Update Job statuses	4
Create/update Job types	6
Update the company Timesheet Type	6
Upload company logo	7
Manage sites	8
Create/Update sites	8
Create a sales item	11
Create a Stock/Material item	13
Manage users	15
Create a new user	16
Manage customers	18
Add customer's contacts	19
Add "Serviceable units"	21
Add additional information/fields to "Serviceable unit".	22
Manage Suppliers	24
Add supplier's contacts	25
Manage forms	27
Jobs	30

## Set up

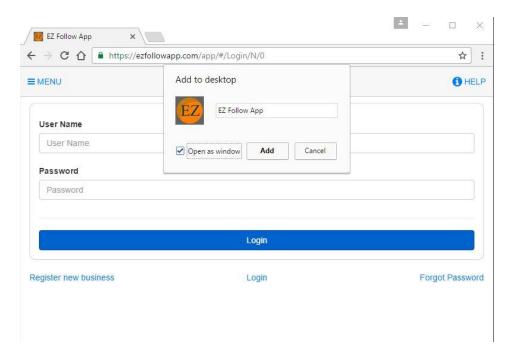
## Create a shortcut on your desktop

We recommend using Google Chrome as a default browser to use the app.

On Chrome browser click on the menu icon click on "More tools" and select "Add to desktop".



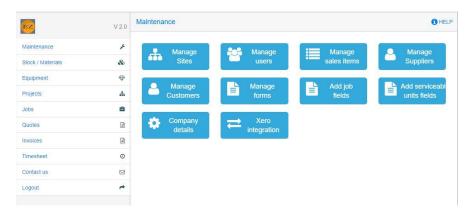
Select "Open as window" and click add.



A shortcut has been added to your desktop. Please use it to open the app.

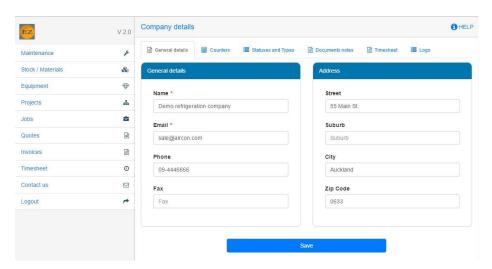
## Setup your company details

From the Maintenance menu select "Company details"



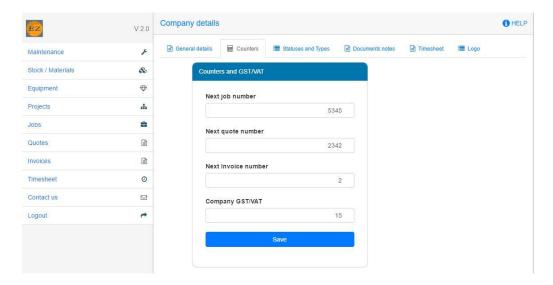
## Update the company general details

In this tab you can setup the company address and contact details. These details will appear on all printed documents.

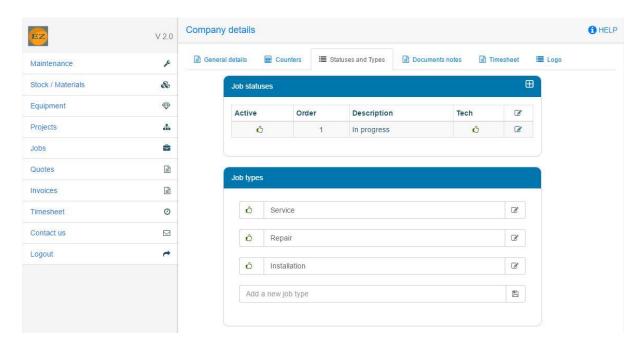


## **Update the company counters**

In this tab you can edit the GST and the next document number for all the documents.



## Update the company statuses and types



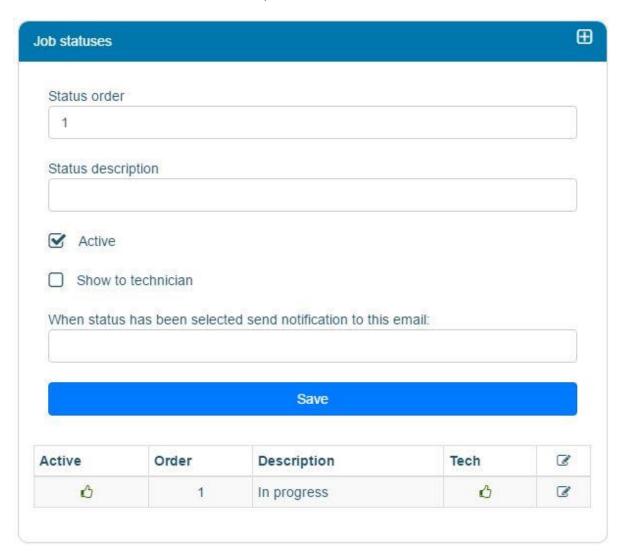
## Create/Update Job statuses

The app has only 3 pre define statuses for jobs: New, Ready for invoice and archive. You can create your own statuses according to your needs. For example: "In progress", "On hold", "Ready for parts" etc.

To create a new status, click on the plus icon.



A form to create a new status will be open.



You can define if the technician will be able to see jobs with this status in his "My jobs" menu.

For example, if you created a status "Waiting for parts" and you do not want the technician to see jobs that have this status you can select this option. If the technician change the job status to this status, this job will not be available for him anymore in his "My jobs" tab.

You can also setup an email alert to notify when the technician change the job to this status.

If you wish to inactive a status, click on the hand icon in the active column. If you wish to hide a status from the technician, click on the hand icon in the tech column. If you wish to update more details click on the edit icon.

## Create/update Job types

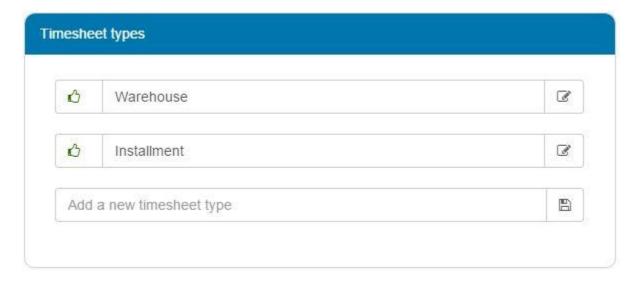


To create a new Job type, enter the type description and click on the save icon.

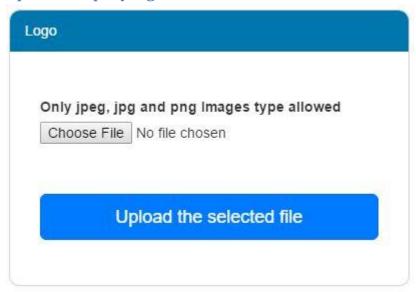
To inactive Job type click on the hand icon. If you wish to edit the type description, change the description and click on the edit icon.

## **Update the company Timesheet Type**

When the technicians enter their timesheets they can setup a type to it. To create a new timesheet type, enter the type description and click on the save icon. To inactive a timesheet type, click on the hand icon. If you wish to edit the type description, change the description and click on the edit icon.



# **Upload company logo**



Select the logo and click on the upload button. Please note that only images files will be uploaded.

### **Manage sites**

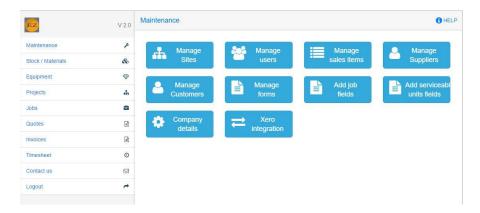
Company sites are used to maintain Stock/Materials or Equipments. A site is an entity that contain a one or multiple locations. A location is the physical place where the material or equipment is.

For example: a warehouse is a site. A shelf in the warehouse is a location.

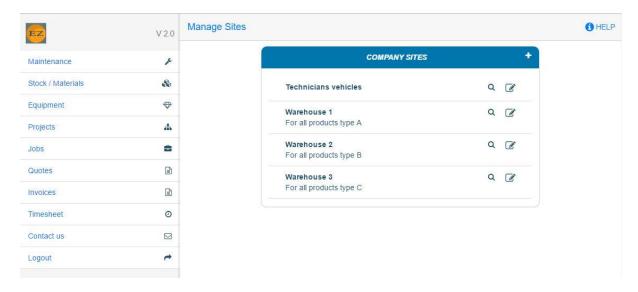
Another example: company vans is a site and each van is a location.

## **Create/Update sites**

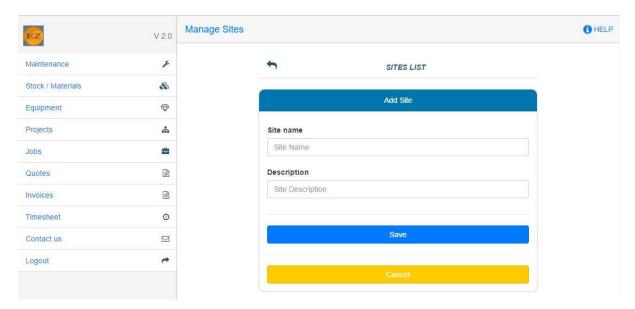
From the Maintenance menu select "Manage sites".



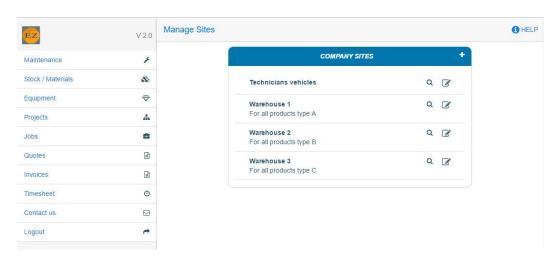
You will see a list of existing sites. To add a new site click on the plus icon.



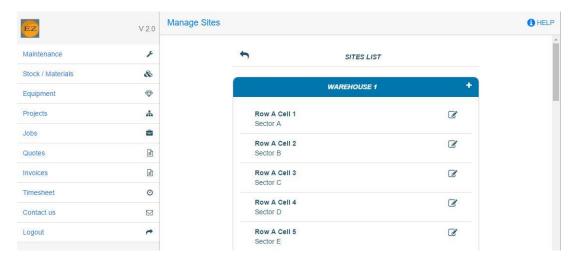
Enter the site name, the site description (optional) and click save.



To edit the site click on the edit icon.



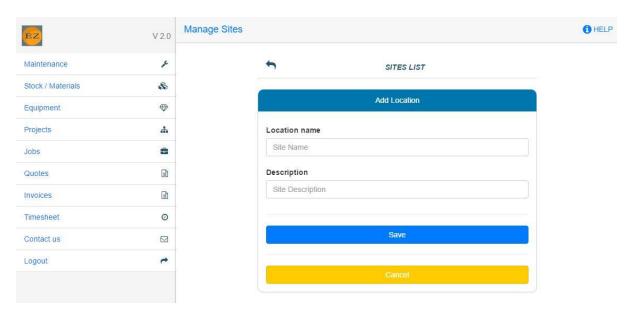
To add location to the site click on the site name. You will see a list of all the locations of that site. To edit a location click on the edit icon to add a new location click on the plus icon.



You have 2 options. To create a sub site or a location. Click on the "Add location" button.



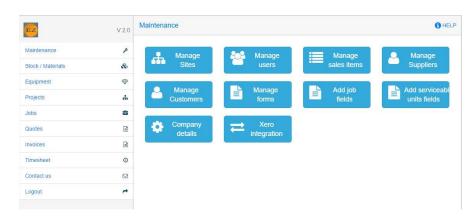
Enter the location name, the location description (optional) and click save.



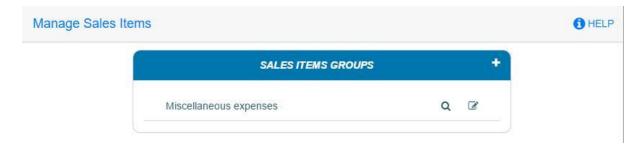
## Create a sales item

Sales item is an item that will be invoiced but it is not a Stock/Material. A good example is "Labour".

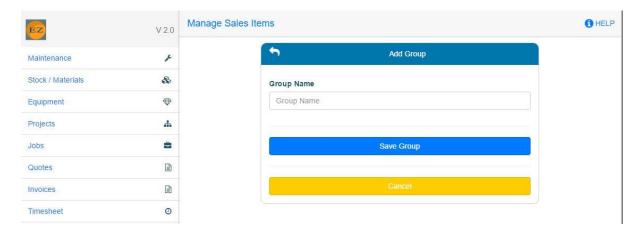
From the Maintenance menu select "Manage sales items".



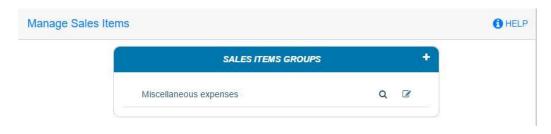
An item must be assigned to an items group. By default the system created a group "Miscellaneous expense". To create a new group click on the plus icon.



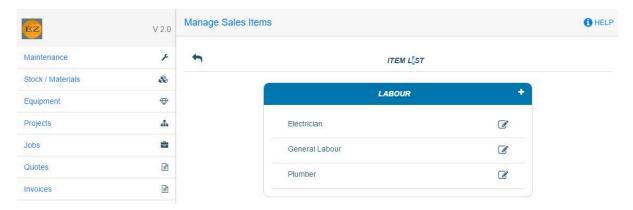
Enter the group name and click "save group".



To add/edit items to the group, click on the group name.



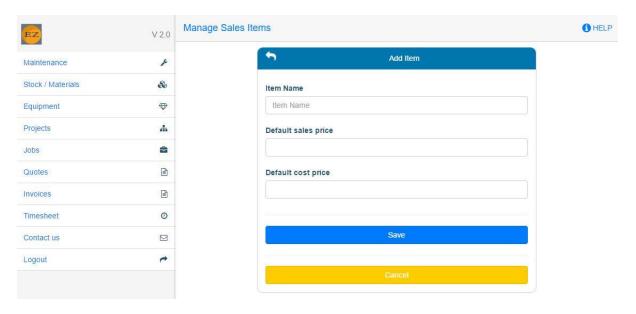
You will see a list of items of the selected group. To edit item click on the edit icon. To add an item click on the plus icon.



You can add a sub group or an item.



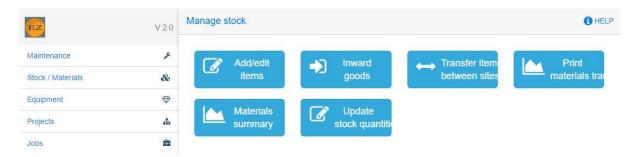
Enter the item name and you can also add a default sales price and default cost price.



## Create a Stock/Material item

Stock/Material items are items that you can maintain and record their quantities. You can create an item for job costing but you don't have to track its quantity.

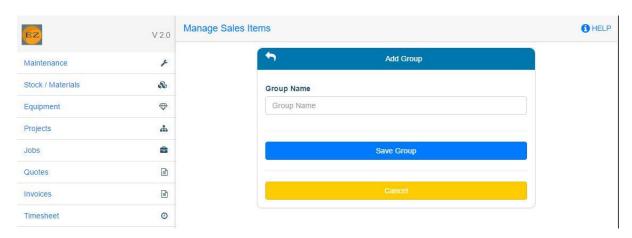
From the Stock/Material menu select "Add/edit item".



An item must be assigned to an items group. To create a new group click on the plus icon.



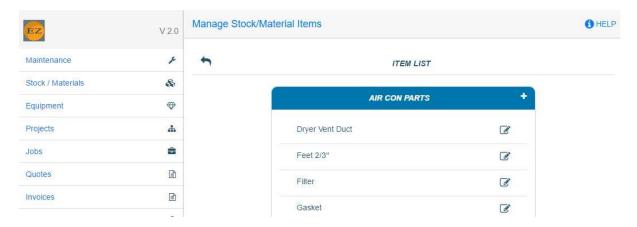
Enter the group name and click "save group".



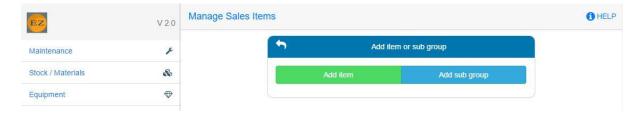
To add/edit items to the group, click on the group name.



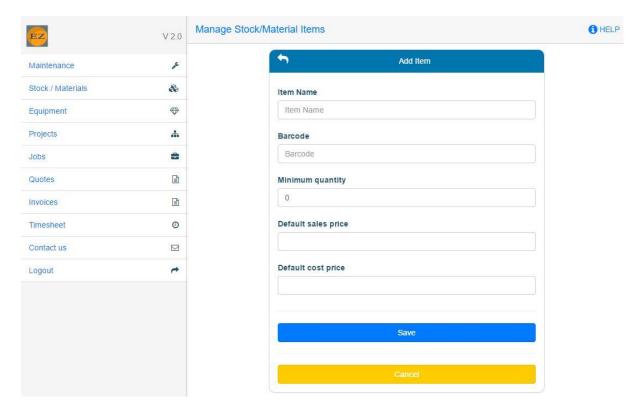
You will see a list of items of the selected group. To edit item click on the edit icon. To add an item click on the plus icon.



You can add a sub group or an item.

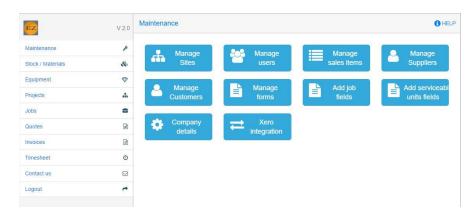


Enter the item name and you can also add barcode, a default sales price, a default cost price and a minimum quantity.

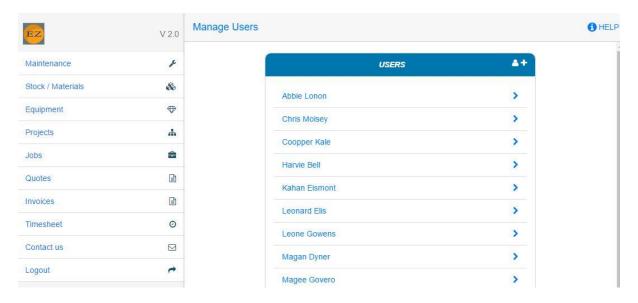


# **Manage users**

From the Maintenance menu select "Manage users".

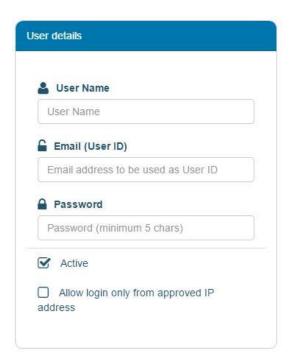


You will see a list of existing users. To edit a user, click on the user name. To add a new user, click on the plus icon.

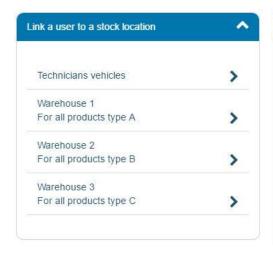


#### Create a new user

Enter the user details. You can define if the user is active or not. You can add another layer of security by selecting the "Allow login only from approved IP address". If you select it, every time that the user login from a new IP address the system will send an email to the user and the user will have to approve it. This option is only for users that are not using mobile devices.

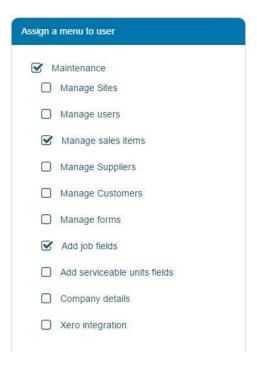


You can link between user to location. Use this option if you maintain stock items/material quantities. With this option if the user use material on a job, the quantities will be deducted from the location that assign to the user.



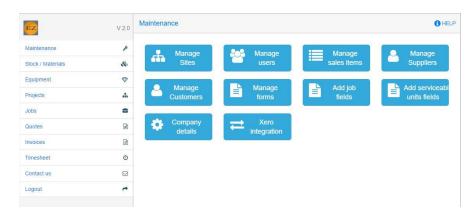


When you create a user you need to assign a menu to the user. With this option you can define what permission that the user have and which menu the user can use.

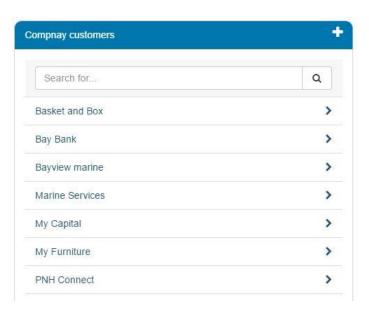


# **Manage customers**

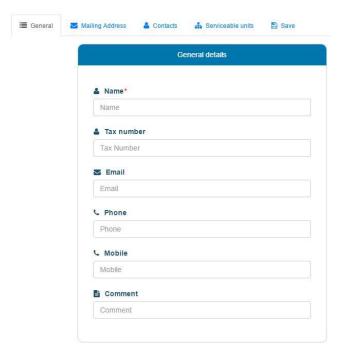
From the Maintenance menu select "Manage customers".



You will see a list of existing customers. To edit a customer, click on the customer name. To add a new customer, click on the plus icon.

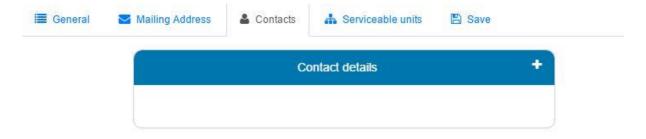


Move between the tabs to enter the client's details. In the "Save" tab you will see a summary of the client and a button to save.

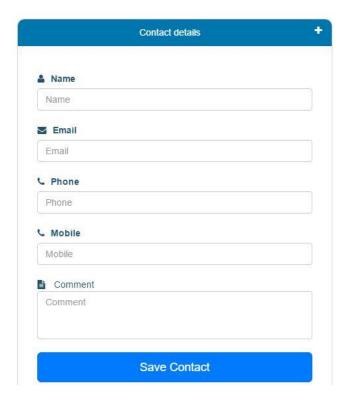


### Add customer's contacts

To add a contact, click on the plus icon.



Enter the contact details and click "Save". Please note, the contact details will be saved temporary to your local computer and only when you save the customer from the "Save" tab it will be saved to the app.



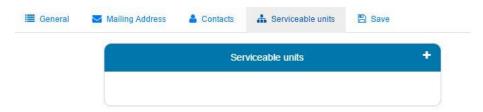
The contact will be added to the contacts list. To add another contact, click again on the plus icon



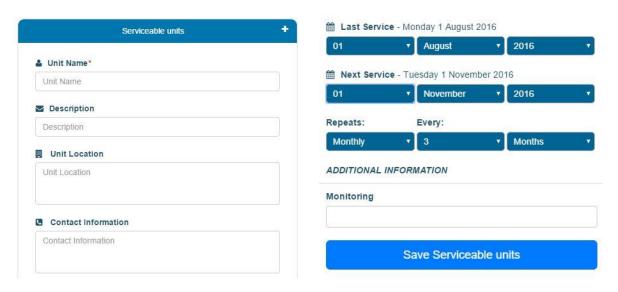
#### Add "Serviceable units"

A "Serviceable unit" is a unit that you need to service it repeatedly. When you add a "Serviceable unit" to your customer, EZ Follow App will notify you on upcoming services and record all the services, repairs, jobs, notes and images to that unit.

To add a unit click on the plus icon.



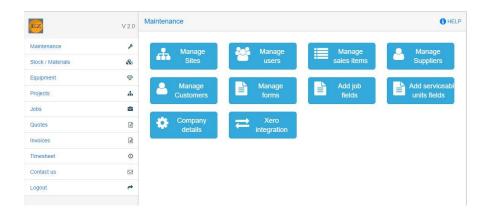
Enter the unit's general details and the service details. Additional information is fields that you can create according to your needs. (Maintenance >> Add serviceable unit fields).



## Add additional information/fields to "Serviceable unit".

Additional information is fields that you can create according to your needs.

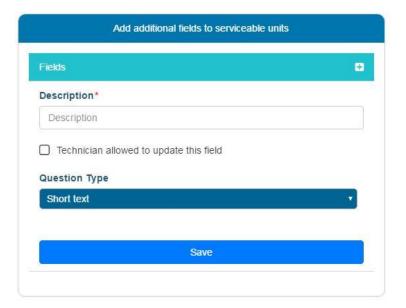
From the Maintenance menu select "Add serviceable units fields".



To create a new field, click on the plus icon.

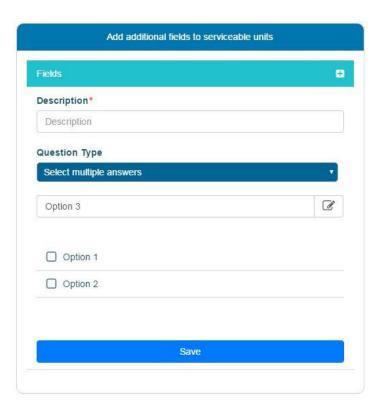


Add the field description. If the technician allows updating this field while he updates the job details, tick the tick box.



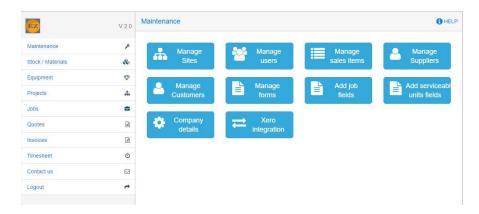
You can add a few fields types: Short text, Long text, Number, List with multiple answers, List with one answer.

To add multiple answers field enter the field description and select the field type. Enter the first option and click the edit icon. Repeat entering all options and click save.



# **Manage Suppliers**

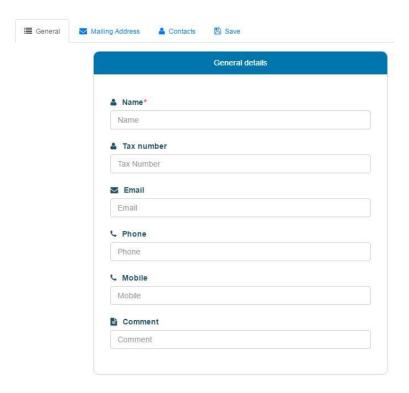
From the Maintenance menu, select "Manage Suppliers".



You will see a list of existing Suppliers. To edit a Supplier, click on the Supplier name. To add a new Supplier, click on the plus icon.

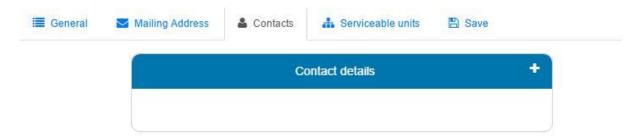


Move between the tabs to enter the Supplier's details. In the "Save" tab you will see a summary of the client and a button to save.

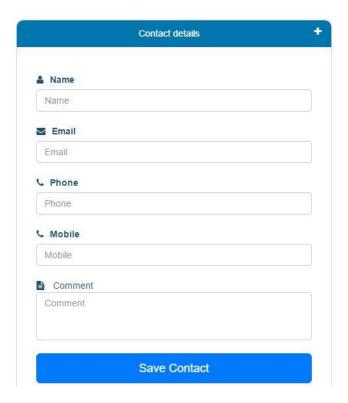


## Add supplier's contacts

To add a contact, click on the plus icon.



Enter the contact details and click "Save". Please note, the contact details will be saved temporary to your local computer and only when you save the customer from the "Save" tab it will be saved to the app.



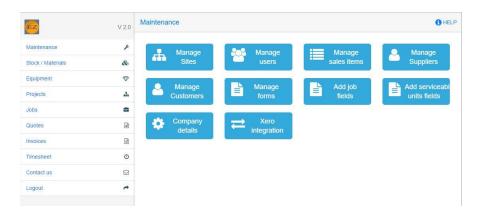
The contact will be added to the contacts list. To add another contact, click again on the plus icon



## **Manage forms**

You can create forms according to your needs. Forms can be assigned to jobs or to a serviceable unit. An example to a Job's form is "Hazard report", an example to a Serviceable unit's form is "Maintenance report"

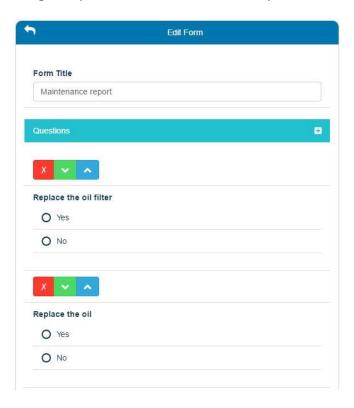
From the Maintenance menu select "Manage forms"



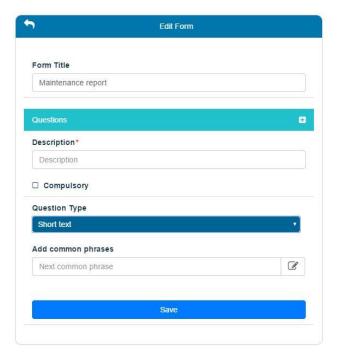
You will see a list of existing forms. To add a new form, enter the form name and click on the save icon. To add questions to the form, click on the form name.



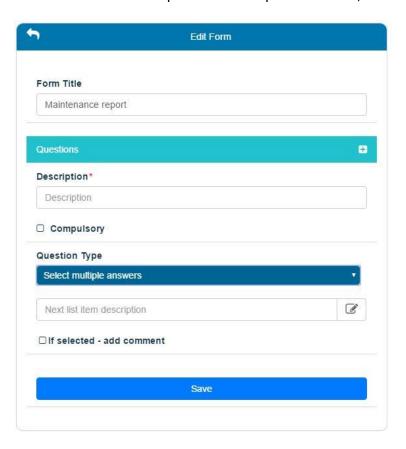
You will see a list of existing questions. You can delete a question or move it up or down by using the question's buttons. To add a question, click on the plus icon.



You can add a few question types: Short text, Long text, Number, List with multiple answers and List with one answer. With open questions, you can add common phrases for the convenience of the technician. You can also define if the question is Compulsory or not.



To add a question with multiple answers, enter the question description and select the question type. Enter the first option and click the edit icon. Repeat entering all options and click save. You can set up a rule if the option selected, to add a comment.

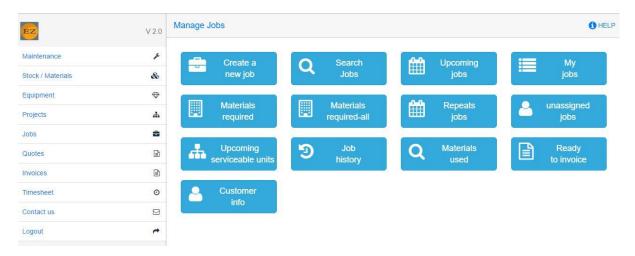


# **Jobs**

# Create a new job

### **Customer details**

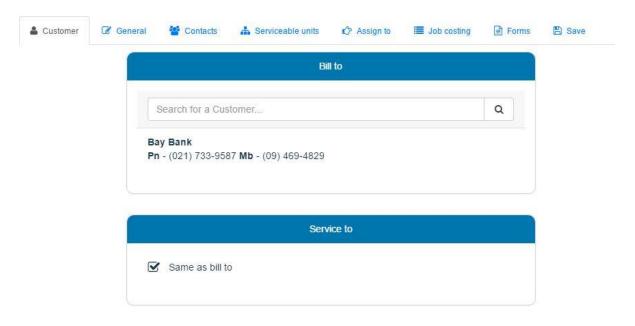
From the **Jobs** menu select "Create a new job".



Search for customer by typing the customer name and click enter or click on the search icon. You can type part of the customer name. Click on the customer name to select it.



When you create the job you can define who will be the billing customer and who will be the service customer if it is not the same customer.

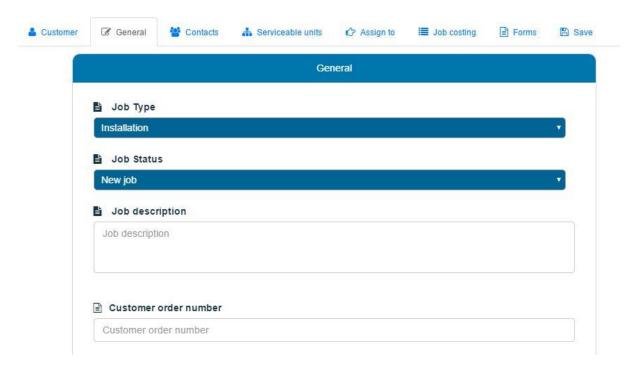


By default, the service customer location will be the site address but you can change it according to your needs.



### **General details**

Select the job type and status, add the job description and the customer order number if applicable.



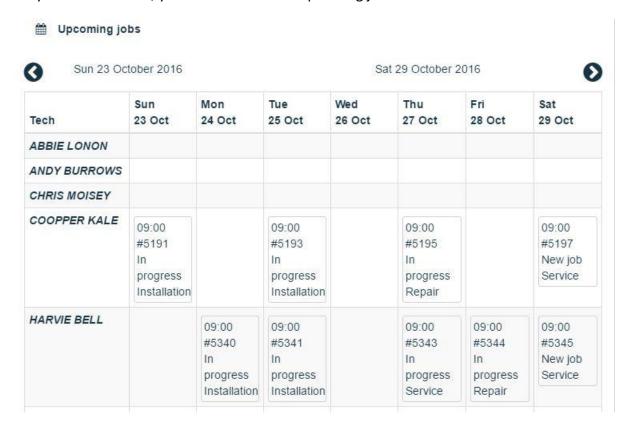
Select the job's date from the calendar, the start time and the estimate job length.

#### m Due date- Monday 24 October 2016

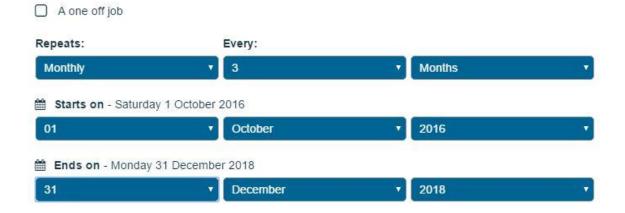
Sunday	October - 2016					>
	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					



For your convenience, you can click on the "Upcoming jobs" to see the available dates.



By default, the App set up the job as a one off job. If this is a repeat job, remove the option and set up the preference.



**Job tasks** - You can create a list of tasks for the technician. Type the task and click on the save icon.

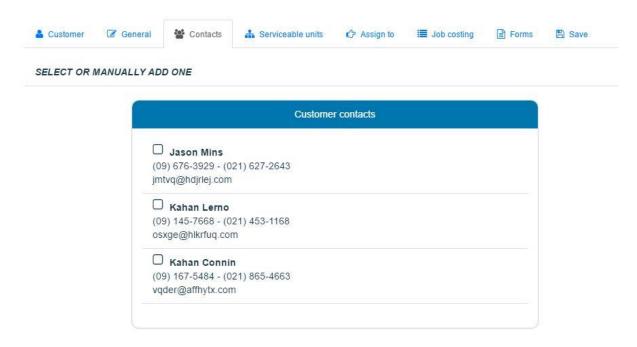


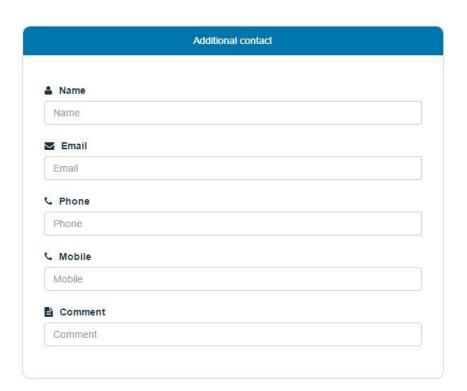
If the technician needs to link the timesheet to the job, tick this check box.

	Record the	job's	duration
--	------------	-------	----------

## **Job contacts**

You can select from your customer's contacts list or add a contact manually.

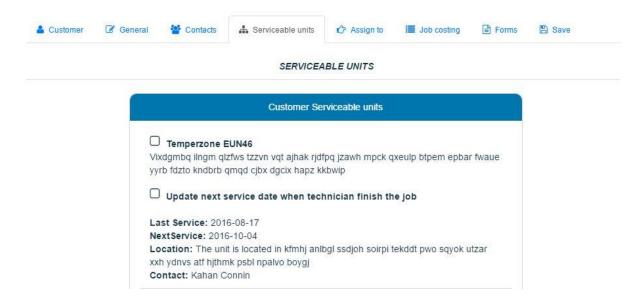




#### Job serviceable units

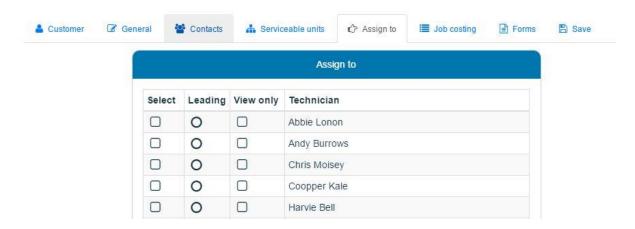
If you create a job to service or repair a serviceable unit. You can select the unit from a list. In this way the App will record the job, notes and images against the serviceable unit.

If the job is a service and you want the App to update the next service day in the end of the job, tick the check box to update the next service date.



### **Job Assign to**

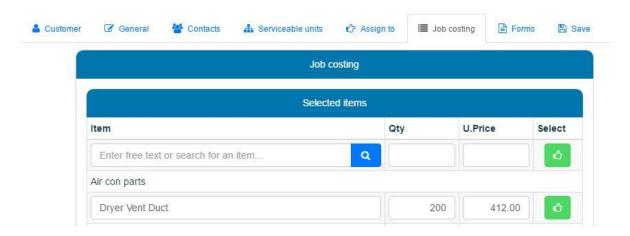
You can assign a job to more than one technician. You can define if the technician will be the leading technician and if the technician can view only. View only means that the technician cannot edit details in the job.



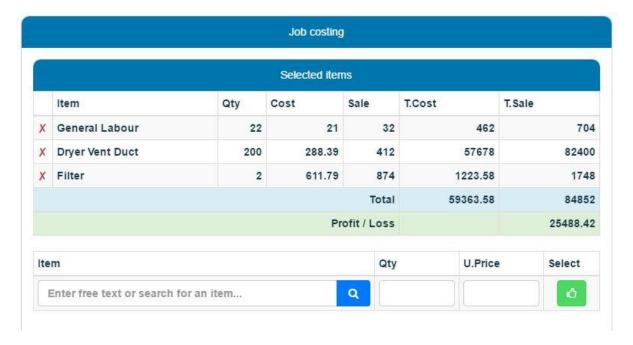
#### **Job costing**

Job costing is a powerful tool to help you see the profit or loss of the job. You can add sales items like labour or materials to the job and calculate the profit. You can add a predefined item or manually create an item.

To search a predefined item, enter a part or all of the item name and click enter. Change the item quantity and unit price if needed and click on the hand icon to add the item to the job costing list.



You can edit the item quantity, cost price or sales price by clicking on it and edit it.



## Job's forms

You can assign forms to the job or to the serviceable unit.

