

# **Gold Service**

## **Managers Instruction Manual**

**Version 0.1**  
**25<sup>th</sup> August 2020**

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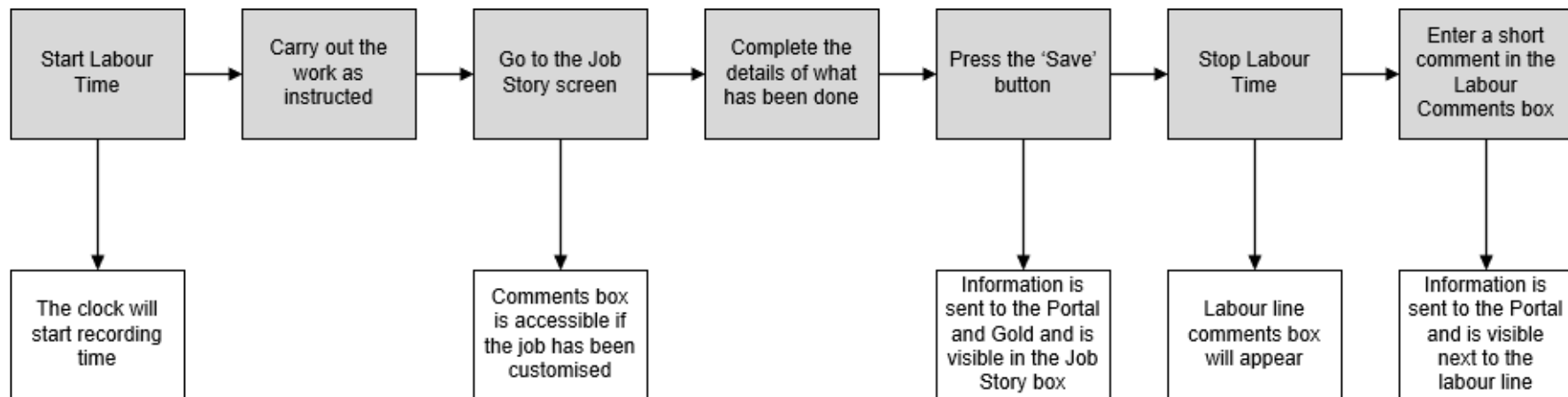
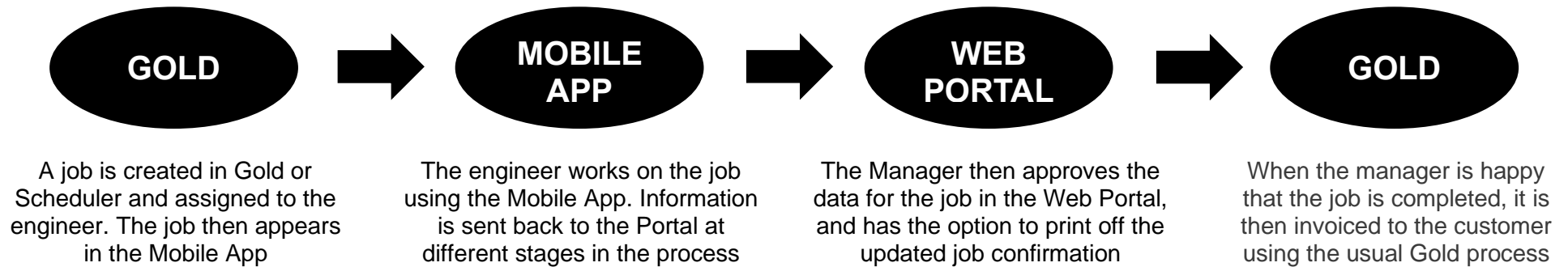
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# Overview of Gold Service

## What is Gold Service?

Gold Service is split into 2 elements: The Mobile App and The Web Portal. The engineers will use the Mobile App to log time, activities and documents against jobs and this information is fed back to the Web Portal for users to view, amend and authorise this information.

The following diagrams show the process followed by engineers using the Mobile App and approvers using the Web Portal:



## What does this document contain?

This document is intended to be used as a training manual for all users of the Web Portal. It contains screen shots and process instructions for all parts of the Mobile App and Web Portal. There is a separate, bitesize Training Manual for the Mobile App for the Engineers.

You can also find lots of short training videos on the Gold Service Landing Page, which can be found in the Customer Portal of the Ibcos Website.

## Overview of the Web Portal

The Web Portal contains the information from jobs that are being worked on in the Mobile App including:

- Stop and start times for travel and labour
- Clock hours of the machine the engineer is working on
- Travel Mileage
- Job story
- Parts used and returned on a job (only available with a Gold Service 2 licence)
- Photos added to the job (only available with a Gold Service 2 licence)
- Customer signature

Using the Web Portal, the managers can review jobs in progress, view and authorise photos added to the job and approve completed jobs.

## Accessing the Web Portal

To access the Web Portal, open a web browser and enter the specific URL provided by Ibcos when Gold Service was implemented.

This URL is unique to each dealership.

The URL will prompt you to enter a username and password. Note: This will be different to the username and password used to access Gold. It will have been provided by a system administrator.

Enter the username and password, and press the Log In button

Ibcos Gold

ibcos@ibcos.co.uk

.....

Remember me

**Log In**

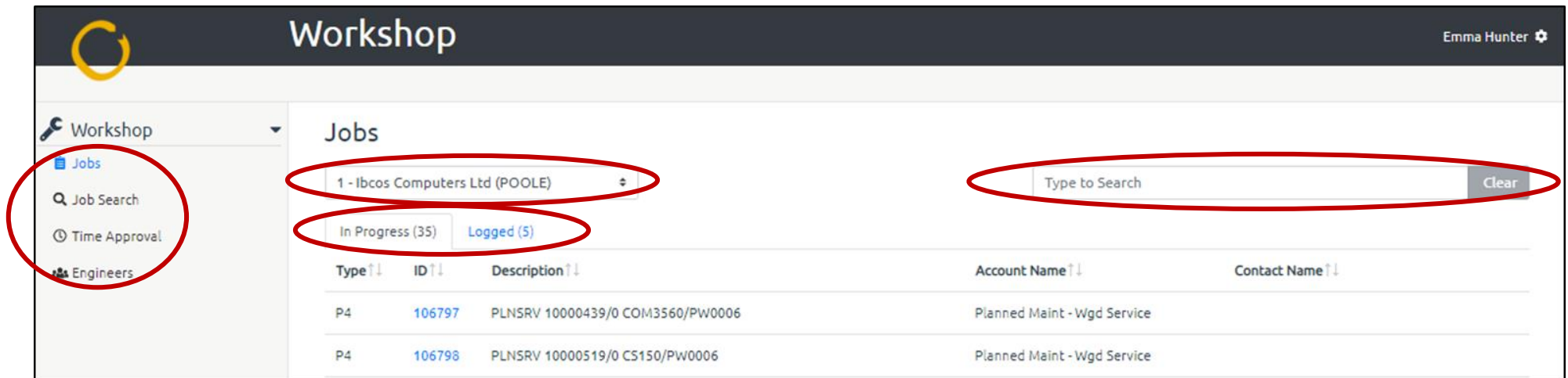
Abacus House  
Acorn Business Park  
Ling Road  
Poole  
Dorset  
BH12 4NZ

01202 714200  
01202 733552  
support@ibcos.co.uk

# Overview of Core Portal Screens

## Job Screen

When you log into the Web Portal, it will take you to the Job screen. You will see 2 tabs at the top of this screen: 'In Progress' and 'Logged'. The 'In Progress' tab shows you all the jobs the engineers are currently working on and have not yet marked as completed. The 'Logged' tab shows you all the jobs that have been completed and are now logged for checking. You will also see a drop-down menu which allows you to move between depots as well as a search bar which allows you to search for information.



Down the left-hand side of the screen, you will see various options to take you to other areas of the Web Portal. These include:

- **Jobs:** Shows a list of all jobs which are allocated to engineers.
- **Job Search:** Enables you to search for jobs
- **Time Approval:** Enables you to approve engineers time entries and amend the data before approval
- **Engineers:** This read only screen provides details of all the engineers



### Did you know?

When you select an individual depot, only the engineers belonging to that depot will be shown. However, all time logged, regardless of depot, will be shown for each engineer.



## Job Search Screen

The Job Search screen allows you to carry out advanced searches for information. At the top of the screen you will see a search bar. You can input your search criteria here, and then use the filters shown underneath the search bar to narrow down your search field. These filters include:

- Depot filter
- Engineer filter
- Status filter
- Start date filter
- End date filter

When you click on either date field it will bring up a calendar mode allowing you to easily choose the required date.

The screenshot shows the 'Workshop' application interface. On the left, a sidebar menu has 'Job Search' highlighted with a red circle. The main area is titled 'Job Search' and contains a search bar and several filters: 'All Depots', 'All Engineers', 'All Statuses', and two date pickers set to '23/06/2019' and '23/09/2019'. A table of results is shown below with the following data:

ID	Description	Status	Engineer	Created Date	Account Name	Account No
106826	Workshop Invoicing	Live	Emma Hunter	24/06/2019 11:13am	Smith & Sons	1225
106828				28/06/2019 10:08am		
106832	Workshop Invoicing	Live	Emma Hunter	22/07/2019 03:49pm	Abacus Building Company	1220



### Did you know?

If you need some help on the screen you are in, you can click the blue help button at the top right. This will bring up a description box to explain how to use the screen.

## Engineers Screen

In the Portal, you will see a new title under the workshop section called 'Engineers'. If you click on this, it will show a list of your engineers.

Id	Name	Depot	Skill Level	Active Jobs	Gold Service
1	John Skill	1	1		
2	Neil Manners	1	2		
3	Rupert Jackson	2	3		

When you click on an engineer's name, it will open to a new page with 2 tabs: 'Details' and 'Stock'.



### Did you know?

The Stock Tab in the Engineers screen relates to the parts feature. More information on this feature can be found in the Parts Feature section.

## Engineers Screen – Details Tab

The Details tab shows all the information about that engineer, including their lunch start and end times, skill level, weekly working hours etc. All the fields shown in this tab are read only and cannot be amended. Should you need to amend any information, you will need to do so in Gold.

The screenshot displays the 'Workshop' application interface. The main header shows the 'Workshop' logo and the user 'Emma Hunter'. A left-hand navigation menu includes 'Workshop', 'Jobs', 'Job Search', 'Time Approval', and 'Engineers'. The main content area is titled 'Engineer Emma Hunter | 333' and features two tabs: 'Details' (highlighted with a red circle) and 'Stock'. The 'Details' tab is divided into two sections: 'Engineer' and 'Scheduling'. The 'Engineer' section contains the following fields:

ID	333
Name*	Emma Hunter
Initials	EH
Password:	
Lunch Start:	12:00:00
Lunch End:	13:00:00
Skill Level	1
Weekly Hours	39
Exclude Lunch	0
Ignore Utilisation	1

The 'Scheduling' section contains the following field:

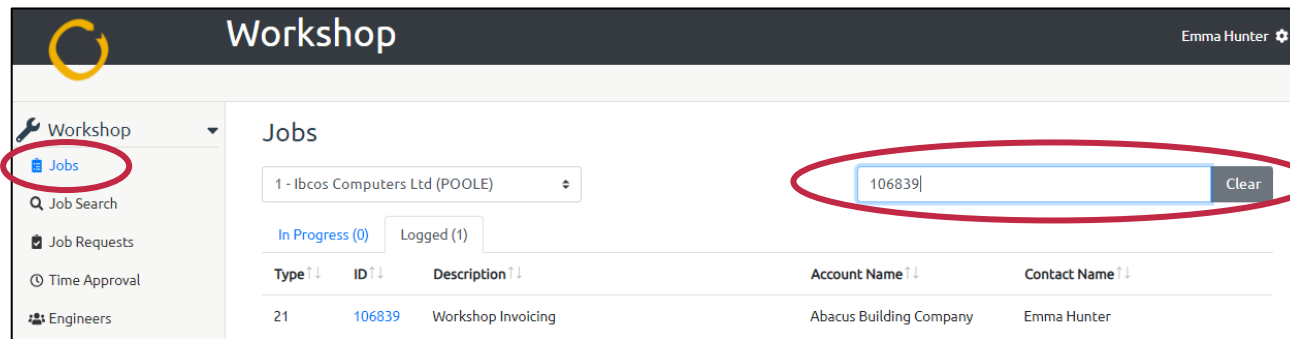
Depot	1
-------	---

At the bottom left of the form, there is a '< Back' button.

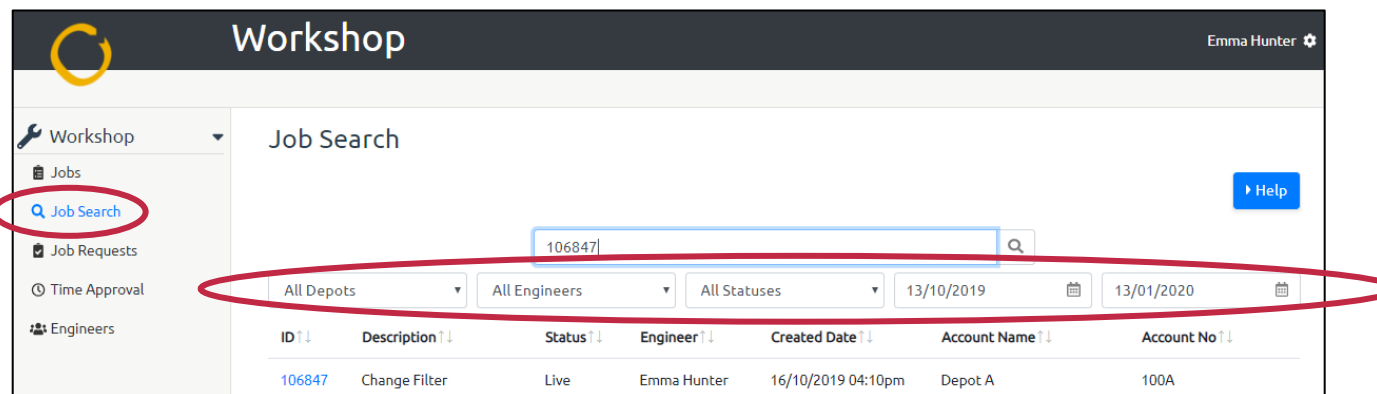
## How to search for a job in the Portal

There are two main areas on the Portal that you can search for jobs: the 'Job Screen' and the 'Job Search' screen (both options can be found in the menu to the left-hand side of the screen). The Job screen is a high-level search function, whilst the 'Job Search' screen allows you to search on more in-depth filters and information.

To search for a job using the Job Screen, enter the job number in the search bar located at the top right-hand side of the screen. You will notice the 'In Progress' and 'Logged' tabs show the number of jobs matching that description. If you are in the wrong tab, it will say 'no jobs match your search criteria', whilst the correct tab will show a number against it indicating a job has been found.



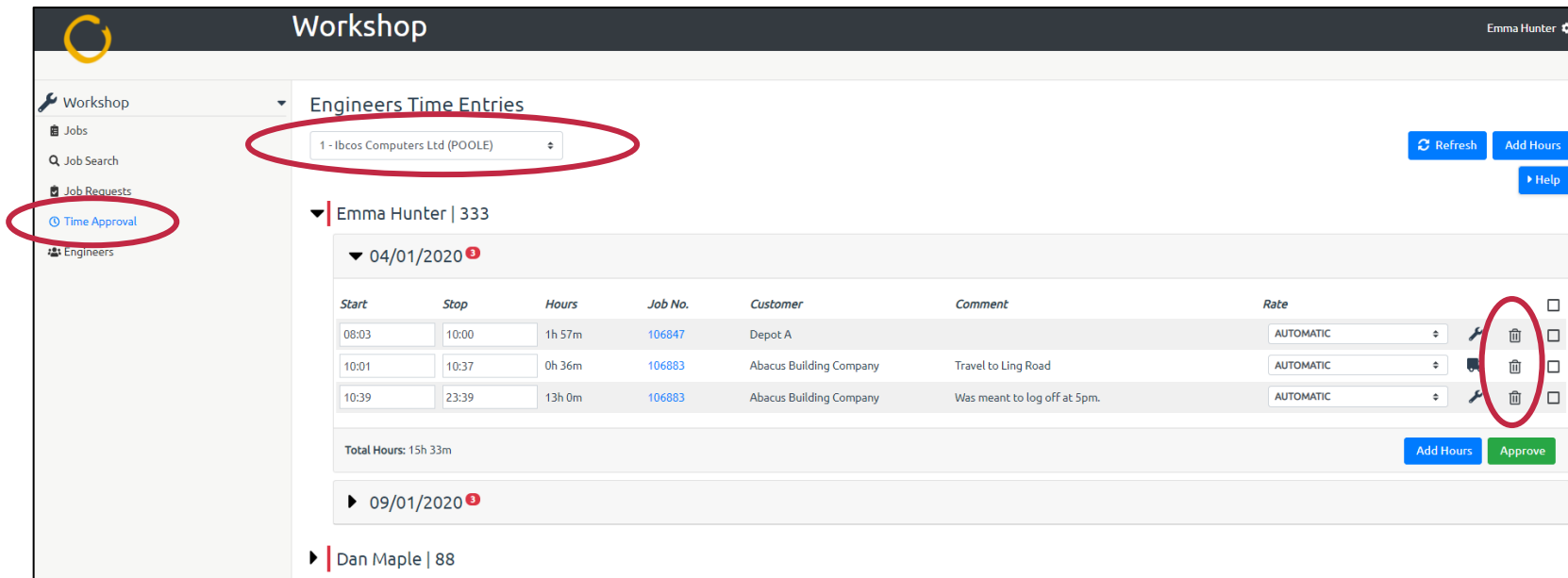
The Job Search screen allows you to search using drop down filters to narrow the search on depots, engineers, status of the job, start and end date of the job.



# How to add, amend, delete and approve time in the Portal

## The Time Approval Screen

When engineers log time using the App, it will show in the Time Approval screen on the Portal. From here, the managers can view and approve the time that the engineers have logged. They can also add, amend or delete entries if necessary.









The default view is set to show all depots and all engineers. This can be changed using the drop-down box at the top left of the screen. When you select an individual depot, only the engineers belonging to that depot will be shown.

Click on the engineer to expand their details. Time entries are shown in date order, with the oldest first. All time logged by that engineer for that day will be shown on this screen, even after it has been approved. This is to ensure you have complete visibility of what the engineer has done for that date.

Click on the spanner or van icons to see if the charge is standard or set against a flat rate. If it is a flat rate, the description of the rate will be shown.

Click on the job number to open the job and view Customer, Wholegood, Labour and History information. More detail on this can be found in this manual.

## A breakdown of the Time Approval Screen symbols

<b>Start</b>	Start time of labour or travel time recorded
<b>Stop</b>	End time of labour or travel time recorded
<b>Hours</b>	Total time recorded for that entry
<b>Total Hours</b>	Shows the total number of hours logged by that engineer for the day
<b>Job No.</b>	Shows the job number that the time entry was logged against. Click on the link to open the job in full screen mode
<b>Customer</b>	Shows the associated customer
<b>Comment</b>	Displays any comments added to the time recording in the App by the engineer
	Shows that the time recorded is related to labour
	Shows that the time recorded is related to travel
<input type="checkbox"/>	The tick boxes allow you to select the row. The tick box at the very top of the column allows you to select all rows at once
<input checked="" type="checkbox"/>	Shows that a row has been selected
	Allows you to delete a selected row. This symbol is only active against rows which have not yet been approved
<input checked="" type="checkbox"/>	Shows that a row has been approved
	The Approve button allows you to approve time of the selected row(s)
	The Add Hours button allows you to add further time for the engineer against that job
	Shows the number of unapproved data entries for that job

## How to add hours for an engineer in the Portal

You can add hours for an engineer in the Portal using the Time Approval Screen. There are 2 methods of doing this.

The first is to use the 'Add Hours' button at the top right-hand side of the screen. This will open a new box and allow you to fill in the details to add extra hours. In this screen, you have the option to 'pre-approve' the time before you add the entry. When you are happy with the content, press the save button. This will take you back to the Time Approval screen.

The second is to use the 'Add Hours' button at the bottom right-hand side of the screen. This will create an extra labour line at the bottom of the engineer's section, allowing you to enter the data for the extra hours.

**Workshop** Emma Hunter

Workshop  
Jobs  
Job Search  
Job Requests  
Time Approval  
Engineers

Engineers Time Entries  
1 - Ibcos Computers Ltd (POOLE)

Refresh Add Hours Help

Emma Hunter | 39

09/01/2020

Start	Stop	Hours	Job No.	Customer	Comment	Rate
09:39	10:02	0h 23m	106797	Planned Maint - Wgd Service		AUTOMATIC
15:33	16:39	1h 6m	106839	Abacus Building Company		AUTOMATIC
17:07	03:33	10h 26m	106839	Abacus Building Company		AUTOMATIC

Total Hours: 11h 55m

Add Hours Approve

**Workshop** Emma Hunter

Workshop  
Jobs  
Job Search  
Job Requests  
Time Approval  
Engineers

Create Time Entry

Job  
Engineer  
Start  
End  
Activity  
Comment  
Approve Now  
Cancel Save

Labour 03:33 00:00 Cancel Save

Total Hours: 11h 55m Approve

## How to amend logged time entries in the Portal

All time entries made in the App by the engineer will show in the Time Approval screen on the Portal.

**Change Stop Date** ✕

Activity **17:07 - 03:33** for job **106839** stops on a different day.

**Start:** 09/01/2020 05:07pm  
**Stop:** 10/01/2020 03:33am

If this is incorrect, please select a new stop date below:

Cancel Save

Workshop
Emma Hunter

- Workshop
- Jobs
- Job Search
- Job Requests
- Time Approval
- Engineers

### Engineers Time Entries

1 - Ibcos Computers Ltd (POOLE) Refresh Add Hours

Help

▼ Emma Hunter | 39

▼ 09/01/2020 3

Start	Stop	Hours	Job No.	Customer	Comment	Rate	
<input type="text" value="09:39"/>	<input type="text" value="10:02"/>	0h 23m	106797	Planned Maint - Wgd Service		AUTOMATIC	
<input type="text" value="15:33"/>	<input type="text" value="16:39"/>	1h 6m	106839	Abacus Building Company		AUTOMATIC	
<input type="text" value="17:07"/>	<input type="text" value="03:33"/>	10h 26m	106839	Abacus Building Company		AUTOMATIC	

Total Hours: 11h 55m Add Hours Approve

You can amend the start and stop time of the entries if they are incorrect. To do this, click into the box you want to amend and enter the new time. Time entries must be in the format hh:mm – if the recorded time goes past midnight into the next day, a black triangle will appear next to the labour line. Clicking on this triangle will open a box asking if this time is correct and enable you to change the stop date if necessary.

Any amendments made to the start and stop times will be captured in the history tab of the Portal for auditing purposes.



**Did you know?**

When amending labour time in the Portal, if the screen refreshes before the amendment is approved, it will revert to the original time.



## How to delete logged time entries in the Portal

All time entries made in the App by the engineer will show in the Time Approval screen on the Portal. Individual time entries can be deleted selecting the entry and pressing the 'Bin' icon. A message will appear asking if you are sure you want to delete the entry. Press 'Delete' to remove it, or 'Cancel' to abort.

The screenshot shows the 'Workshop' interface for 'Emma Hunter | 333' on '04/01/2020'. It displays a table of time entries with columns for Start, Stop, Hours, Job No., Customer, Comment, and Rate. A red arrow points from the 'Bin' icon in the third row to a confirmation dialog box titled 'Are you sure?'. The dialog box contains the text: 'Do you really want to delete this item? This process cannot be undone.' and has 'Cancel' and 'Delete' buttons.

Start	Stop	Hours	Job No.	Customer	Comment	Rate	
08:03	10:00	1h 57m	106847	Depot A			<input type="checkbox"/>
10:01	10:37	0h 36m	106883	Abacus Building Company	Travel to Ling Road	AUTOMATIC	<input type="checkbox"/>
10:39	23:39	13h 0m	106883	Abacus Building Company	Was meant to log off at 5pm.	AUTOMATIC	<input type="checkbox"/>

When an entry is deleted, the row will appear crossed out on the screen initially. Once the screen has been refreshed, the entry will disappear completely.

Start	Stop	Hours	Job No.	Customer	Comment	Rate	
08:03	10:00	1h 57m	106847	Depot A			<input checked="" type="checkbox"/>
<del>10:01</del>	<del>10:37</del>	<del>0h 36m</del>	<del>106883</del>	<del>Abacus Building Company</del>	<del>Travel to Ling Road</del>		<input type="checkbox"/>



### Did you know?

When you delete an entry, it will be captured in the History tab of the Portal for auditing purposes.

## How to change labour rates in the Portal

You can now change the rates set against individual time entries in the Portal before approving them. This feature allows you to select specific rates other than the time clock control determined 'Automatic Rate'.

The screenshot shows the 'Workshop' interface with the 'Engineers Time Entries' section. A table lists time entries for Emma Hunter on 07/01/2020. The 'Rate' column has a dropdown menu open, showing options: AUTOMATIC, 1 - NORMAL TIME, 2 - OVERTIME, 3 - APPRENTICE NORMAL, 4 - APPRENTICE OVERTIME, 5 - CONTRACTORS, and 12 - ADJUSTMENTS. The '1 - NORMAL TIME' option is highlighted. A red circle highlights the dropdown menu.

Start	Stop	Hours	Job No.	Customer	Comment	Rate
07:47	10:39	2h 52m	106839	Abacus Building Company		AUTOMATIC
09:39	12:37	2h 58m	106839	Abacus Building Company		AUTOMATIC
15:33	16:39	1h 6m	106839	Abacus Building Company		1 - NORMAL TIME

Total Hours: 6h 56m

This functionality will only work in conjunction with the current Gold process which is to set the applicable labour rates on either the 'Hours Per Day' or 'Time of Day' basis in the 'Time Clock Control' maintenance program.

You will see a drop-down list in the Time Approval Screen under the 'Rate' column. The Labour Rates descriptions set in Gold will determine the options available in these drop-down lists, and the option you choose will determine the rate that is charged to the customer for that labour line.

The default rate on the Portal will be set to the 'AUTOMATIC' option, which will pull the rates from the Time Clock File in Gold. If no information is set in the Time Clock program, the default labour rate set on the invoice types will be used. If no rates are set in the Invoice Type Screen, the default labour rate set in the Engineer Rate program will be used.

To override the default rate, choose another option from the drop-down list, and approve the time entry. The next few pages show you how to set the labour rates up in Gold, and how to amend them in the Portal.

## How to approve logged time entries in the Portal

When the engineer has logged time in the App, it will show in the Time Approval screen. From here, it will need to be approved for the entry to be added to the job. If you hover over the spanner icon, it will show you what type of labour rate it is (i.e. standard labour rate)

To approve the time entry, select the row using the tick box, and press the 'Approve' button. Any rows which have been selected will show a tick in the tick box  and these will all be approved. Once they have been approved, the tick box will change to green

Once all the rows have been approved for a specific engineer / date combination, the time entries will disappear from the screen when it is refreshed. If more time is logged against that engineer for that date, all the time entries will all re-appear on the screen again with the status of approved.

The screenshot displays the 'Workshop' interface for user 'Emma Hunter'. The main content area shows time entries for the date '07/01/2020'. The table below summarizes the entries:

Start	Stop	Hours	Job No.	Customer	Comment	Rate	Status
07:47	10:39	2h 52m	106839	Abacus Building Company		Labour	<input type="checkbox"/>
09:39	12:37	2h 58m	106839	Abacus Building Company		Standard Labour	<input type="checkbox"/>
15:33	16:39	1h 6m	106839	Abacus Building Company			<input checked="" type="checkbox"/>

At the bottom of the table, there is a summary row: 'Labour' | 16:39 | 00:00. Below this, the 'Total Hours' are listed as '6h 56m'. A green 'Approve' button is located at the bottom right of the table area.



### Did you know?

When the time entry has been approved in the Portal, it will be updated in Gold.

## Overview of the Full Screen Mode of a Job

Job numbers in the Portal are hyperlinks and can be used to open the job in full screen mode. These hyperlinks will work in any screen that they appear in (for example, the Search screen, Time Approval screen and Jobs screen).

When you open in full screen mode you will see numerous Tabs across the middle of the screen – Job, Customer, Wholegood, Labour and History. At the top of the screen you will see the job information (Job Number, Status, Customer, Invoice Type and Date), and at the bottom of the screen you will see the Job Confirmation button. All of these will be visible no matter which tab you are in.

When you open a job in full screen mode, you will default to the Job Tab. If you want to make the story box and parts box bigger, you can click on the 3 lines at the bottom left hand corner of the box and drag it down. This will make the box larger.

The screenshot displays the 'Workshop' interface for Job 106839. The top header shows the job number and status. The main content area is divided into several sections: Job Information (Job: 106839, Status: Logged, Customer: 1220 - Abacus Building Company, Invoice Type: 21 - Workshop Invoicing, Date:), a tabbed interface (Job, Customer, Wholegood, Parts, Labour, Documents, History), Order Number, Depot (POOLE (1)), Engineer (Emma Hunter (333)), Completed By (Emma Hunter (333)), Completed On (06/08/2019 11:41am), Mileage (0), Clock Hours (333), Story (The above equipment has been serviced in accordance with the manufacturers specifications.), and Parts (parts). A 'Job Confirmation' button is located at the bottom right. A 'Back' button is at the bottom left.



### Did you know?

When you are in Full Screen Mode and you press the back button of your internet browser, it will take you back to the previous main screen and will not navigate back through the tabs. This is expected web-based behaviour which we are unable to change.

## Job Tab

You can view and amend details added to the job by the engineer in the Gold Service Mobile App. To do this, search for the job that you want to view or amend and click on the job number to open the job's full screen mode. The screen will default to the 'Job' tab. From here, there are 4 main areas you can amend:

The screenshot shows the 'Workshop' interface for Job 106802. The top navigation bar includes 'Workshop' and the user name 'Emma Hunter'. A sidebar on the left lists navigation options: Jobs, Job Search, Job Requests, Time Approval, and Engineers. The main content area displays job details for Job 106802, including Job Status (Live), Customer (1225 - Smith & Sons), Invoice Type (21 - Workshop Invoicing), and Date (29/11/2018). Below this, there are tabs for Job, Customer, Wholegood, Parts, Labour, Documents, and History. The 'Job' tab is active, showing fields for Order Number, Depot (POOLE (1)), Mileage (3339), Engineer (Neil Manners (2)), and Clock Hours (7). There is also a 'Parts' section with a text box containing 'No parts.' At the bottom right, the 'Reset' and 'Save' buttons are circled in red. A 'Back' button is at the bottom left, and a 'Job Confirmation' button is at the bottom right.

- Mileage:** If the mileage has been entered in the App by the engineer, it will appear on this screen. If not, it will remain blank
- Job Story:** If a story has been set against an invoice type in Gold, it will here alongside any information entered in the App by the engineer
- Clock Hours:** If the clock hours have been entered in the App by the engineer, it will appear on this screen. If not, it will remain blank
- Parts:** Parts notes added to the parts text box in the App will be visible here once the job has been marked as completed in the App

To amend these areas in the Portal, click on the box you want to amend, type in the information and press the save button. For mileage and clock hours you can use the arrows that appear when you click on the box to increase or decrease the value as necessary.

If you enter information and want to revert to the original data, you can press the reset button. This only works if you have not yet pressed the save button.

## Customer Tab

The Customer Tab provides visibility of the following information:

- Customer Account Number
- Customer Contact Name
- Customer Delivery Address
- Account Name
- Customer Phone Number

The screenshot shows the 'Workshop' interface for Job 106839. The user 'Emma Hunter' is logged in. The left sidebar contains navigation options: Workshop, Jobs, Job Search, Job Requests, Time Approval, and Engineers. The main content area displays job details for Job 106839, including Job Status (Logged), Customer (1220 - Abacus Building Company), Invoice Type (21 - Workshop Invoicing), and Date. Below this, there are tabs for Job, Customer, Wholegood, Parts, Labour, Documents, and History. The 'Customer' tab is active, showing Account No. (1220), Account Name (Abacus Building Company), Contact Name (Emma Hunter), Contact Phone No. (01202714200), and Delivery Address (-). A 'Back' button is located at the bottom left, and a 'Job Confirmation' button is at the bottom right.

Job:	106839	Invoice Type:	21 - Workshop Invoicing
Status:	Logged	Date:	
Customer:	1220 - Abacus Building Company		

Job Customer Wholegood Parts Labour Documents History

Account No.:	1220	Account Name:	Abacus Building Company
Contact Name:	Emma Hunter	Contact Phone No.:	01202714200
Delivery Address:	-		

The data on this screen is pulled from the information entered when you created the job in Gold and cannot be amended in the Portal.

## Wholegood Tab

The Wholegood tab contains all the information relating to the Wholegood being worked on.

**Workshop** Emma Hunter

**Job 106839**

Job: 106839 Invoice Type: 21 - Workshop Invoicing  
 Status: Logged  
 Customer: 1220 - Abacus Building Company Date:

Job Customer Wholegood Parts Labour Documents History

Wholegood Number: 10000629 Serial Number:  
 Make: Normal Franchise Model: -  
 Engine Power: - Clock Hours: -  
 New/Used: Used Year: -  
 Group Code: USED TRACTOR  
 Registration Number: -  
 Warranty End Date: 05/08/2019  
 Replacement Date: -  
 Finance End Date: -  
 Specification: 4 Wheel Drive, Aircon, 16 Forward 8 Reverse, Hydro Spool Valves, , , , ,

< Back Job Confirmation

This data on this screen is pulled from the information entered when you created the job in Gold and cannot be amended in the Portal.

Engineers can add the serial number to the job in the description tab of the App. This information is then fed back to the Portal. Should the information entered not correspond with the serial number registered to the Wholegood, you will see a warning triangle

## Labour Tab

The Labour Tab allows you to view all the labour recorded for that job by all the engineers who have worked on it. This screen cannot be edited.

**Workshop** Job 106839

Job: 106839 Invoice Type: 21 - Workshop Invoicing  
 Status: Logged  
 Customer: 1220 - Abacus Building Company Date:

Job Customer Wholegood Parts **Labour** Documents History

Approved Labour: 1.12 hours.

Rate	Labour Description	Date ↑↓	Engineer ↑↓	Hours	Value
1	11.40-11.41 LA	06/08/2019	<a href="#">Emma Hunter</a>	0.02	0.60
2	15.33-16.39 LA	07/01/2020	<a href="#">Emma Hunter</a>	1.1	38.50

[← Back](#) [Job Confirmation](#)

- **The Rate Column** – Shows the rate the labour was charged against
- **The Labour Description** - Shows the times for the labour
- **Date Column** – Shows the date the work was carried out
- **Engineer Column** – Shows the engineer who recorded that labour line
- **Hours Column** – Shows the total number of hours for that labour line
- **Value Column** – Shows the monetary value of that labour line – this information matches that in Gold



### Did you know?

When you are in the Labour Tab, you can click on the Engineers name. The hyperlink will take you to the Engineers details page where you can view information such as lunch start and end times, skill level, weekly hours worked etc.



## History Tab

The History Tab captures and records all activity that is made from both the App and the Portal and is particularly useful for audit purposes.

**Workshop** Emma Hunter

Workshop ▾ Job 106839

Jobs  
Job Search  
Job Requests  
Time Approval  
Engineers

Job: 106839 Invoice Type: 21 - Workshop Invoicing  
Status: Logged  
Customer: 1220 - Abacus Building Company Date:

Job Customer Wholegood Parts Labour Documents History

- 21/01/2020 11:07am (117) Emma Hunter: Created activity.  
Created through the Portal.
- 10/01/2020 03:33am (117) Emma Hunter: Stopped labour.
- 09/01/2020 05:07pm (117) Emma Hunter: Started labour.
- 09/01/2020 04:49pm (107) Emma Hunter: Created activity.  
Created through the Portal.
- 09/01/2020 04:39pm (103) Emma Hunter: Stopped labour.
- 09/01/2020 04:38pm (105) Emma Hunter: Approved labour for Emma Hunter.  
Approved time from 07/01/2020 15:33:00 to 07/01/2020 16:39:00.
- 09/01/2020 04:37pm (106) Emma Hunter: Created activity.  
Created through the Portal.
- 09/01/2020 04:37pm (105) Emma Hunter: Created activity.

v7.21.0.202001211303 Company: 333 Ibcos Demo Data Depot: All ibcos A Constellation software company



### Did you know?

The History Tab also captures the GPS location of an engineer when they stop recording time. You will need to have a Gold Service 2.0 licence to take advantage of this feature. More information on the GPS Stamp Location feature can be found in this manual.

## How to view and print a PDF Job Card

At any point before invoicing a job, you can view and print a PDF job confirmation from the Portal. To do this, search for the job you want and open it in full screen mode. You will notice a blue 'Job Confirmation' button at the bottom right hand side of the screen. This button is visible on all tabs in that job and can be utilised from any area.

The screenshot displays the 'Workshop' software interface for Job 106839. The top navigation bar shows the user 'Emma Hunter'. The left sidebar contains menu items: Workshop, Jobs, Job Search, Job Requests, Time Approval, and Engineers. The main content area is titled 'Job 106839' and contains the following details:

- Job:** 106839
- Status:** Logged
- Customer:** 1220 - Abacus Building Company
- Invoice Type:** 21 - Workshop Invoicing
- Date:**

Below these details are tabs for 'Job', 'Customer', 'Wholegood', 'Parts', 'Labour', 'Documents', and 'History'. The 'Job' tab is active, showing:

- Order Number:** -
- Depot:** POOLE (1)
- Completed By:** Emma Hunter (333)
- Mileage:**
- Engineer:** Emma Hunter (333)
- Completed On:** 06/08/2019 11:41am
- Clock Hours:**

There are two text areas: 'Story: Job story will show here' and 'Parts: Parts will show here'. At the bottom right, there are 'Reset' and 'Save' buttons. At the bottom left, there is a 'Back' button. At the bottom right, there is a prominent blue 'Job Confirmation' button.

Click on the 'Job Confirmation' button, and it will open the Job Confirmation in a new page. The next page of this manual will show what this looks like.

The job confirmation will contain all the details of the job. The data provided will pull through from the job on the Portal. You can use the 'Back' button to go back to the job and amend any necessary information, or you can use the 'Export to PDF' if you are happy with the content.

When you click the 'Export to PDF' button, the item will download to the bottom of your screen. Click on this to open the PDF on your screen.

**Workshop** Emma Hunter

**Job 106839** Job Confirmation - Job No: 106839

Customer: Abacus Building Company  
Acorn Business Park  
Tower Park  
Poole  
BH12 4NZ


---

Acc/Order No	Date	Stk No.	Reg No.	Job Type
1220/		10000629		Workshop Invoicing
Make/Model	Normal Franchise			
Specification	4 Wheel Drive, Aircon, 16 Forward & Reverse, Hydro Spool Valves, . . . .			
Serial No	Clock	Van Mileage		
333	333	0		

Job Description: Workshop Invoicing  
Contact: Emma Hunter 01202714200

---

Completed By: Emma Hunter (333) Completed On: 06/08/2019 11:41am  
Customer Name: EMMA Signature Date: 06/08/2019 11:41am

Customer Signature: 

---

Job Instructions: **\*\* Parts Used \*\***  
\*\*\*\*\*

Job Story: The above equipment has been serviced in accordance with the manufacturers specifications.

Parts: parts

Service Administrator  Parts Department  Service Delivery Manager

Date	Name	Hours	Description
06/08/2019	Emma Hunter	0.02	11.40-11.41 LA
07/01/2020	Emma Hunter	1.1	15.33-16.39 LA

[Back](#) [Export PDF](#)



**Did you know?**

Once a job has been invoiced, the Job Confirmation cannot be retrieved. Best practice would be to export the PDF and save this for future reference, especially in relation to warranty jobs.

## Customisable job stories

When creating a workshop job in Gold, you have the ability to customise the job story. This enables elements of the job story to be completed at any time by the engineer on the Gold Service Mobile app, and when saved, the information will reach the Gold Service Portal immediately and be displayed in the Job Story box. This is without the engineer having to complete the job.

This feature has 2 methods of set up:

### Pre-Set Headings:

Provides the engineer with separate sections to complete on the App based on pre-set headings in the story. Set them manually when creating a job or set them as a default story against an invoice type to automatically populate the job with this information. This process can be repeated for different combinations. Pre-set headings are often used for Warranty purposes e.g. headings of Complaint, Cause, Correction, Causal Part.

### Free Text Box:

You can keep the job story in the App as a 'free' textbox, allowing the engineer to input any information without being prompted by specific headers.

It is not mandatory to customise the job story when creating the job in Gold. However, if you choose not to follow this process, then the engineer cannot edit the story and can only enter final remarks when the job is completed.

We recommend using the Customisable Job story feature if you want the story to reach the Portal before this point. Every time the engineer enters text into the story and saves it, the text will appear in the Portal. This feature works particularly well if the job is expected to last longer than a day and is for one engineer.

Please note: there are some constraints relating to multiple engineers working on the same job. Before you assign the job to another engineer, please ensure the previous engineer has checked the cloud icon in the app, and manually sent any outstanding data to the portal. If you do not follow these steps, and their story has not reached the Portal, the information will not be visible in the App to the next engineer and will not become part of the story in the Portal. Please also remember to upload Activities or documents first, and job completions last to ensure all the information reaches the Portal correctly.

The following table shows what symbols you need to use to customise your job story.

It is important that the text is entered correctly as it is the # and the = symbols that create the text boxes and single line fields. If this isn't done, the headings will not be split out into the separate sections for the engineer to complete.

The symbols must be used at the start of the sentence. If you use them anywhere within the middle of text that you write, it will not have any impact.

Text to enter on Job Story in Gold	What shows up in the Job Story on the App	Example
# Section Name	Generates a multi text area that the engineer can complete on the App	# Complaint
# Section Name Some pre-defined text		# Complaint Enter details of the complaint
= Field Name	Generates a single line field that the engineer can complete on the App	= Causal Part
= Field Name: Field Value		= Causal Part: enter part number
General Text	Will just appear on the App	Complete the following sections in full

## Pre-set heading example

Here is an example of how to create pre-set headings. For any stories set up in this way, the text is displayed back on the portal and in other areas of Gold, like prints or reports, as plain text. It will match the format set up in the story:

```

Job: 106874  INV   Inv Type:21   Workshop Invoicing   Parts:      0.00
Cust:  1220  Abacus Building Company   10/12/19   Labour:     0.00
| Head| Cont| Parts| Lab| FlatR| Story| Inv| Instru| Opt| Prt| Audit| Docs| OIP| Txt| Events|
# Complaint

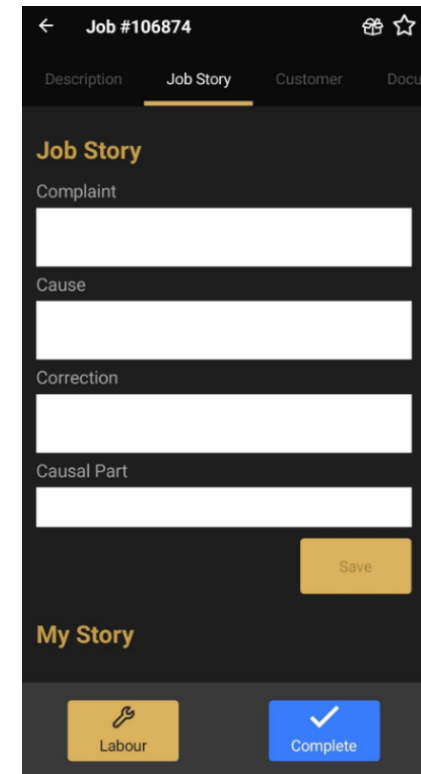
# Cause

# Correction

= Casual Part

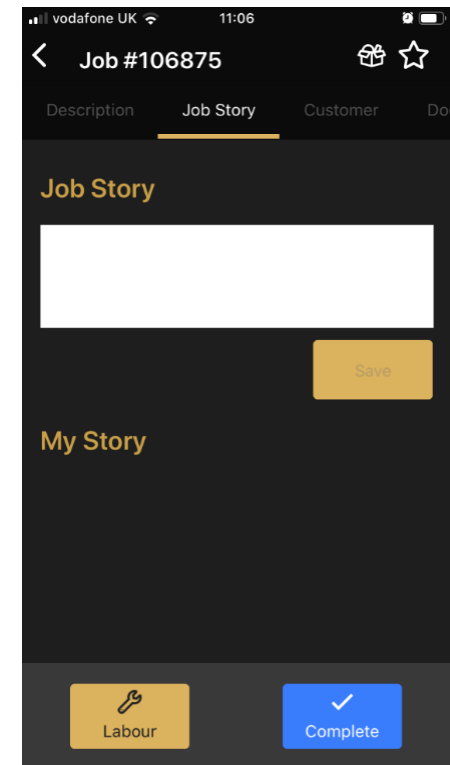
Use Shortcuts or arrow keys to view
F2      | F3 Amend | F4      | F5      | F6      | F7      | F8

```



## Free text box example

Here is an example of how to create a single free text box for any stories set up in this way, the text is displayed back on the portal and in other areas of Gold, like prints or reports, as plain text. It will match the format set up in the story:



## Understanding the different comment areas:

There are 3 areas that the engineer can add comments into Gold Service, which will reach the Portal. Each area should be used in a specific way to maximise their benefits:

- Labour Line Comments – should be used to enter information about the labour carried out and is designed for small pieces of information. For example: the engineer can use this comments box if they have forgotten to stop labour time.
- Job Story Comments – should be used to enter any information relating to the work they are carrying out. This information should be comprehensive and provide full visibility of what has been done throughout the job.
- Final Remarks – should be used to enter any final thoughts about the job.

The next few pages explain each comment area in detail.



## Labour Line Comments:

When the engineer presses the button to stop logging time, a comments box will appear on the screen. It is not a mandatory requirement to use this box, but we do encourage the engineers to provide brief information about the labour time they have just recorded. For example: they can explain that they forgot to stop logging time and finished earlier. This information is sent to the Portal immediately and is visible next to the labour line in the Time Approval screen. It will also be visible in the 'my story' section of the Gold Service App.

**Workshop** Emma Hunter

Engineers Time Entries

1 - Ibcos Computers Ltd (POOLE)

Refresh Add Hours Help

Emma Hunter | 333

19/12/2019

Start	Stop	Hours	Job No.	Customer	Comment	Rate
10:41	10:44	0h 3m	106880	Abacus Building Company		AUTOMATIC
10:45	10:47	0h 2m	106880	Abacus Building Company	I finished at 10.30 but forgot to stop logging time.	AUTOMATIC

Total Hours: 0h 5m Add Hours Approve

As soon as the labour line has been authorised, this comment will appear in the History tab.

**Workshop** Emma Hunter

Status: Live Customer: 1220 - Abacus Building Company Date: 19/12/2019

Job Customer Wholegood Parts Labour Documents History

EH 19/12/2019 10:55am (68) Emma Hunter: Approved labour for Emma Hunter. Approved time from 19/12/2019 10:45:00 to 19/12/2019 10:47:00.

EH 19/12/2019 10:55am (68) Emma Hunter: Changed end time. End changed from 19/12/2019 10:47:10 to 19/12/2019 10:47:00.

EH 19/12/2019 10:55am (68) Emma Hunter: Changed start time. Start changed from 19/12/2019 10:45:31 to 19/12/2019 10:45:00.

EH 19/12/2019 10:47am (68) Emma Hunter: Uploaded time.

EH 19/12/2019 10:47am (68) Emma Hunter: Stopped labour. I finished at 10.30 but forgot to stop logging time.

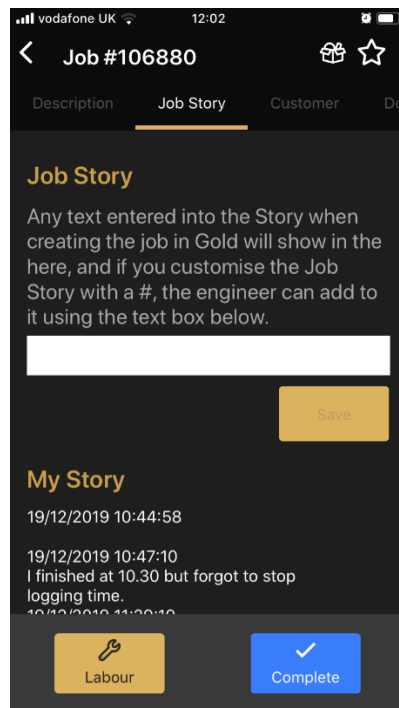
## Job Story:

The Job Story section should be used by the engineer to provide information about the work they have carried out. If you have added any text into the Job Story when creating the job in Gold, it will show in the Job Story section on the Gold Service Mobile App,

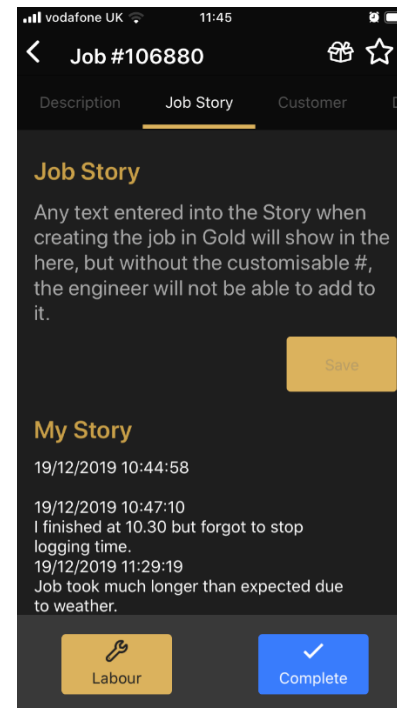
If you have customised the job story, the text box will be available immediately for the engineer to complete at any time on the Gold Service Mobile app, and when saved, the information will reach the Gold Service Portal and Gold immediately and be displayed in the Job Story box. This is without the engineer having to complete the job. (See Image 1 below)

If you haven't customised the job story, the text box will not be available to the engineer until they complete the job (see Image 2 below):

**Image 1**  
Customised Job Story

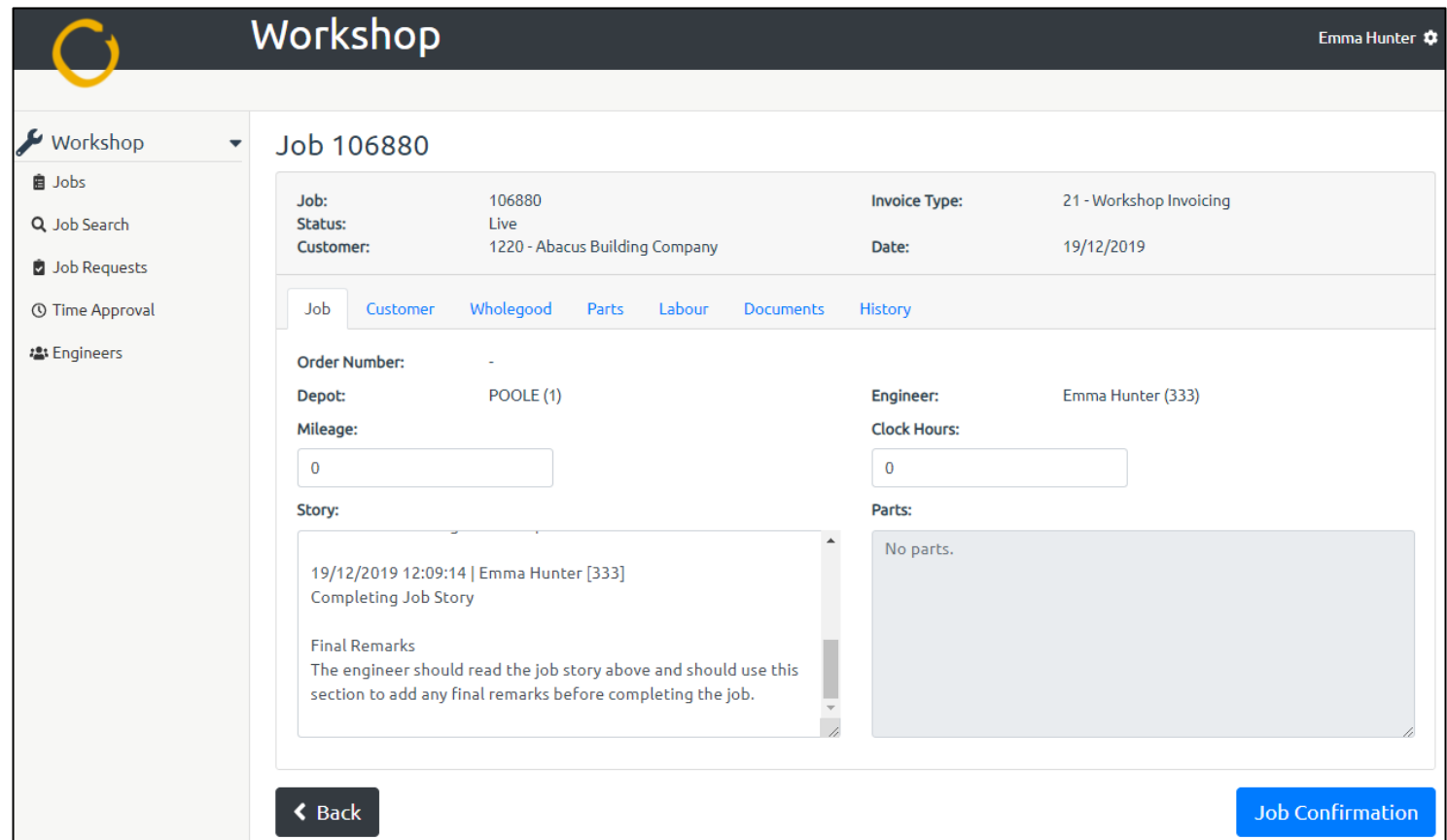
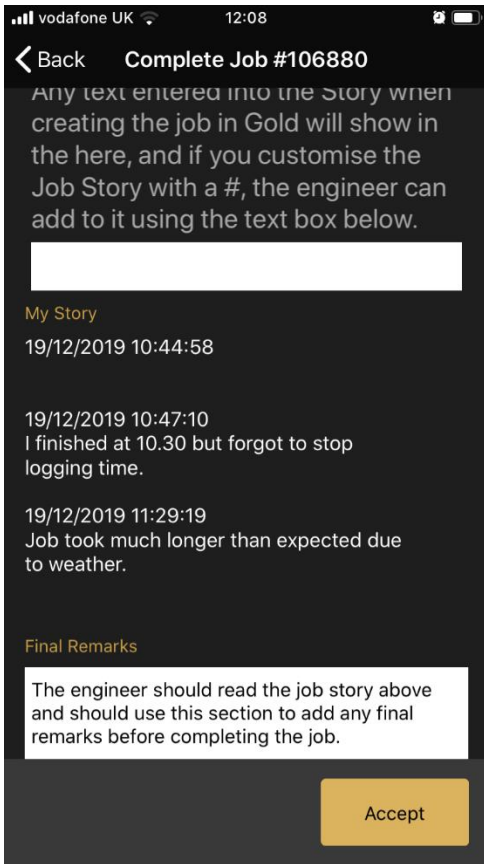


**Image 2**  
Non-Customised Job Story



## Final Remarks:

When the engineer presses the 'Complete' button, the Job Story will be visible to refresh their memory of what has been added during the work carried out. The Final Remarks box should be used by the engineer to add any final thoughts at the point of completing the job. This information will reach the Portal and be visible in the Job Story box.



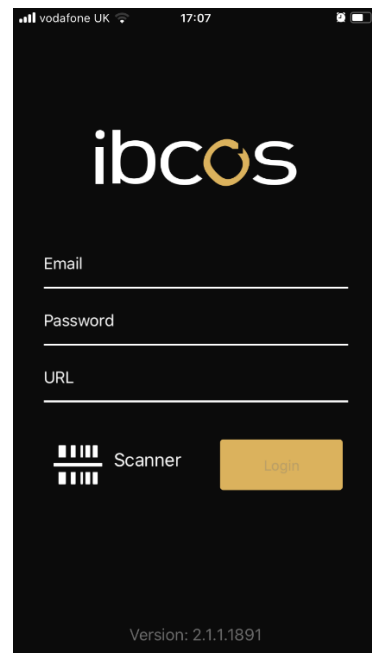
# Overview of the Gold Service Mobile App

This section provides a brief overview of the Gold Service Mobile App screens, how to navigate through them and what functionality is in each one.

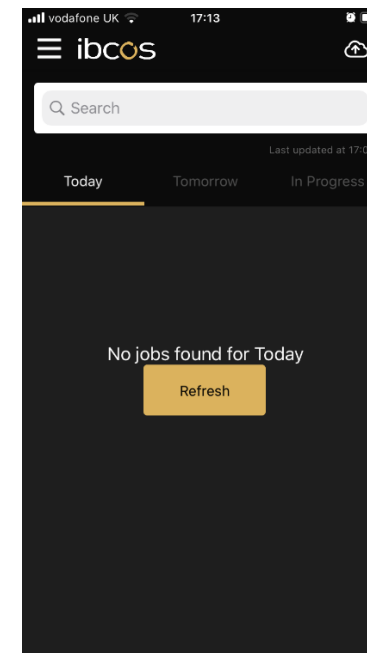
## The Log-in Screen

The first step is the log in screen. Engineers will need to enter their email, password and specific URL credentials to enter the Gold Service Mobile App. Once these have been entered, they will see the home screen.

The Log-in Screen



The Home Screen



### Did you know?

If the Gold Service Mobile App is inactive for a week or more, it will automatically log the engineer out and they will have to enter their log in credentials again to gain access.

## The Home Screen

The home screen is the first screen the engineer will see when they log into the App. This screen has various functions:

### Search Bar

The search bar allows the engineer to search for a job using criteria such as job number, customer name, date etc. This search bar is visible in most screens in the App.

### Today / Tomorrow / In Progress Tabs

At the top of the screen underneath the search bar, you will see 3 tabs:

- **Today Tab:** Shows all jobs scheduled for that engineer for today
- **Tomorrow Tab:** Shows all jobs scheduled for that engineer for tomorrow
- **In Progress Tab:** Shows all jobs the engineer has logged time against but not yet completed

To move through these tabs, simply scroll through the pages. You can also scroll the tab titles at the top of the page and select the one you want. The orange bar under the title denotes which tab you are currently on.

### Last updated Time and Date

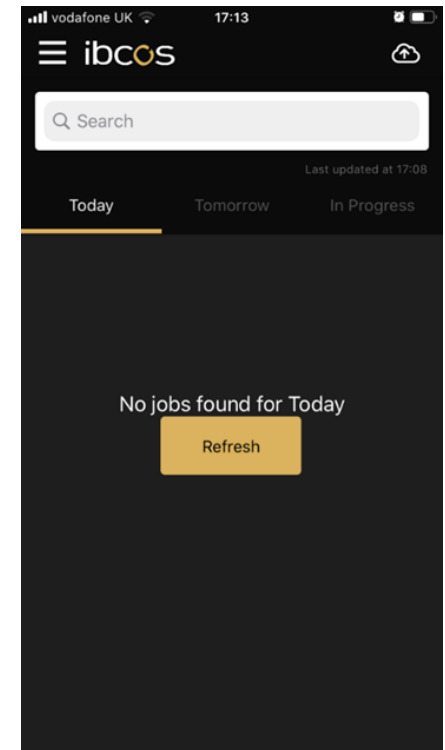
Engineers must refresh their screens on the Gold Service Mobile App to receive any changes or additions that have been made to their jobs. Whenever they refresh the screen, the date and time of when this action was carried out will show at the top right of the screen (underneath the search bar).

### Manual Upload Cloud

Any data that has not managed to reach the Portal will be visible in the cloud icon on the App. Simply click on it, and it will list all jobs which require a manual upload. It is recommended that the engineers do this as a matter of course at the end of every day.

### Main Menu

The 3 lines at the top left-hand side of the screen will open the main menu. More information on this is shown in the Main Menu section



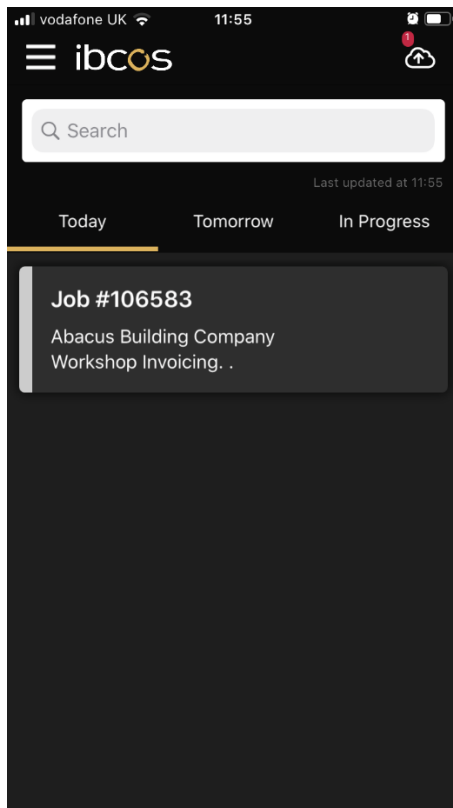
### Did you know?

The jobs which are shown in the 'Work In Progress' Tab will remain visible on this screen even if they have been invoiced. They will only be removed from this screen once the Month End process has been carried out.

## Job Colours Explained

Jobs on the App will show as different colours, depending on their current status. Below, you can see what each colour represents.

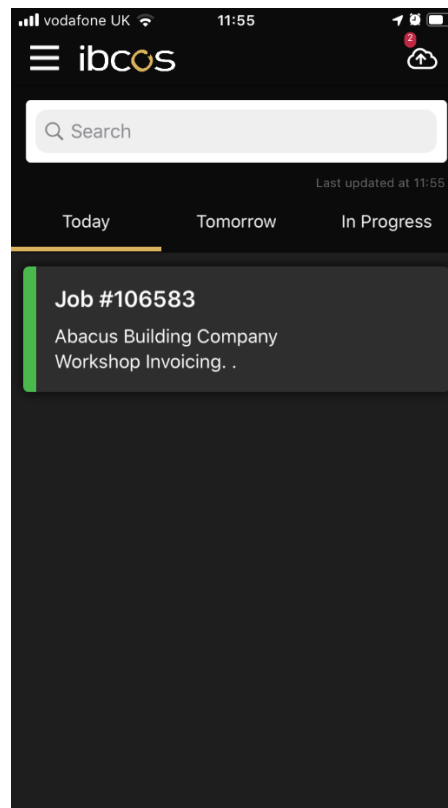
### GREY



### NOT STARTED

Job has not been started yet – no time has been logged against it

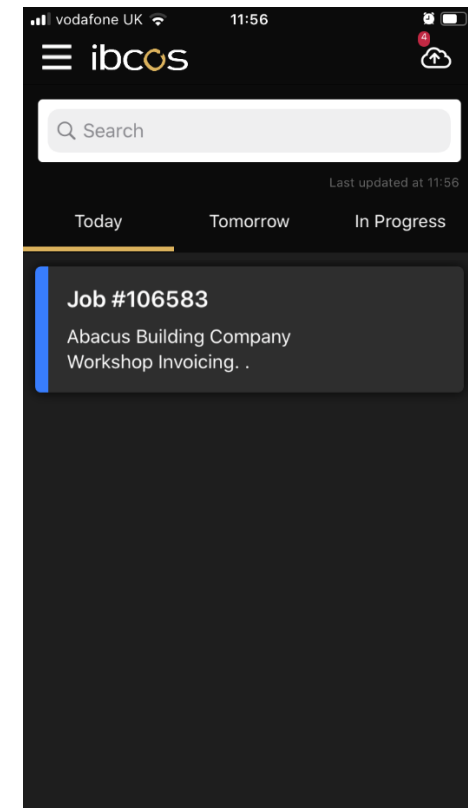
### GREEN



### STARTED

Time has been logged on a job, but the job hasn't been completed.

### BLUE



### COMPLETED

The job has been marked as completed, and is now in 'Logged for Checking'

## The Main Menu

In the Home screen of the App you will see a menu icon at the top left of the screen. Click on this icon to open the Main Menu. Here you will see:

### Jobs Section:

**Your Jobs:** takes you back to the home screen

**Favourite Jobs:** Shows jobs marked as favourite (Gold Service 2 users only)

**Week Summary:** Shows a summary of the time logged for that week

More detail on the favourite jobs and week summary screens are provided in this manual

### Parts Section: (Gold Service 2 users only)

**Collection:** Shows parts allocated to specific jobs which need to be collected

**Stock:** Shows a list of stock allocated to that engineer to use when necessary

More information on the Parts feature is provided in this manual

### System Section:

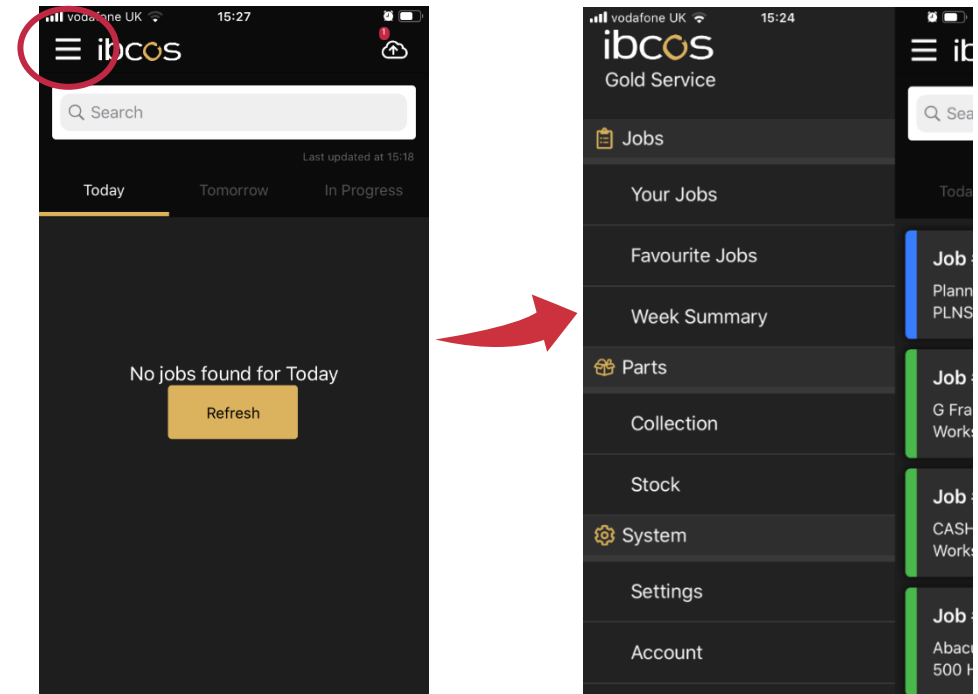
**Settings:** Shows systems settings for that phone and Mobile App

**Account:** Shows account details for that phone and Mobile App

**Diagnostics:** Shows App version, Device Manufacturer and Model and OS version

### Log Out:

If you need to log out of the App you can do so via the main menu

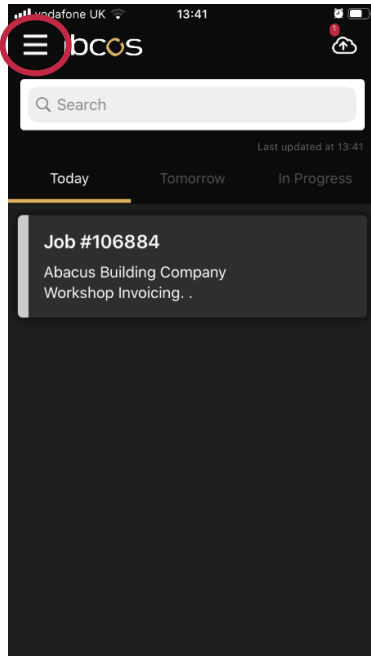


### Did you know?

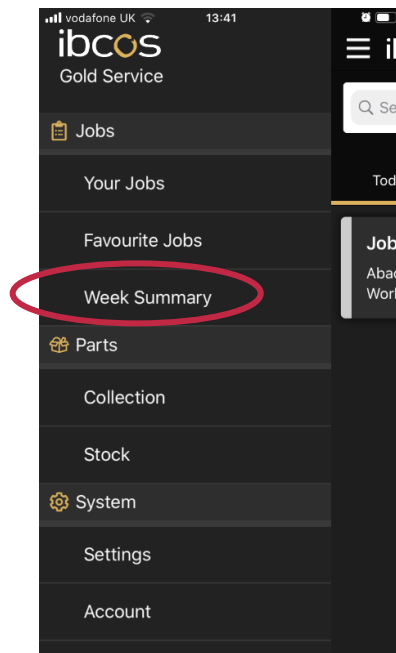
The main menu can only be accessed from the Home screen of the Mobile App.

## Week Summary View

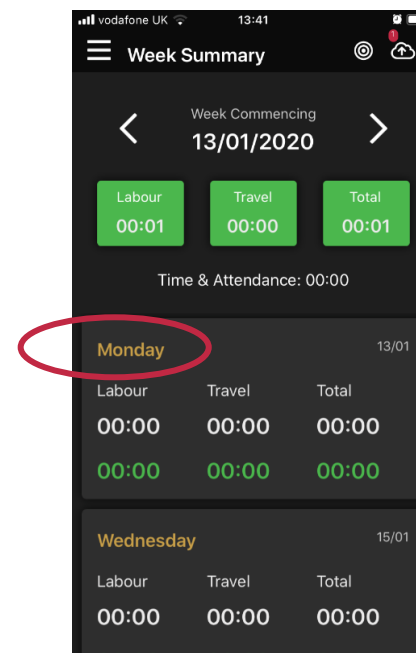
In the Main Menu, you will see the 'Week Summary' option. If you click on this, it will open a new screen which displays all labour and travel time the engineer has recorded for that week. You can change the week that you are viewing by using the arrows located next to the week commencing date



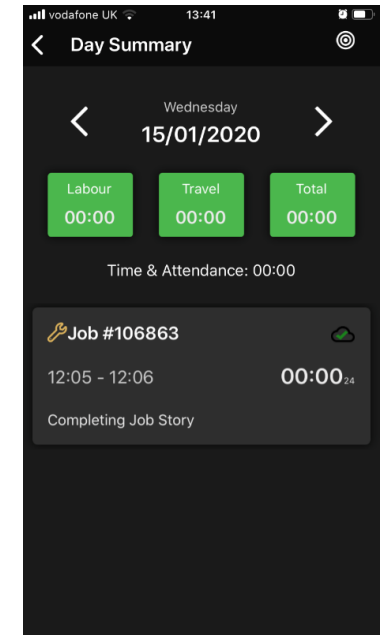
On the home screen, click the Main Menu. This will open a new screen



Choose the 'Week Summary' option to see all labour and travel time logged for that week



Click on one of the days to view all the jobs that time was logged against



Click on a day to see all jobs that time was logged against for that particular day



### Did you know?

The white line shows time logged but not yet approved in the Portal. The green line shows time logged and approved in the Portal. The white values will always represent exactly what the engineer has recorded. So, if they have logged 10 hours, 10 hours will be displayed. If 5 hours are approved in the Portal, 10 hours will show in white and 5 hours will show in green. If a service admin reduces the remaining 5 hours (which have not been approved) to 4 hours, and then approves it, 10 hours will show in white and 9 hours will show in green.



# Tabs within the Job

## Description Tab

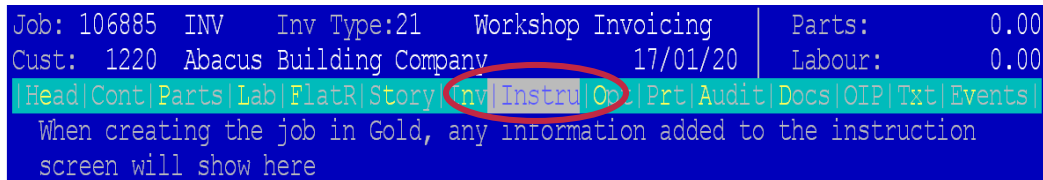
The Description screen is the first screen the engineer will see when they open a job in the App. It contains:

### Description of the job

This screen will show a brief description of the job which has been pulled from the invoice type in Gold

### Job Instructions

When a job is created in Gold, the user has the option to add instructions for the job in the instruction screen. Any information added to this screen will show in the Instructions section on the App.



### Wholegood Number

The Wholegood number is populated from the information in Gold. This field cannot be edited in the App

### Wholegood

The name of the Wholegood is populated from the information in Gold and cannot be edited in the App. If it is not entered in Gold, this field will be blank.

### Registration Number

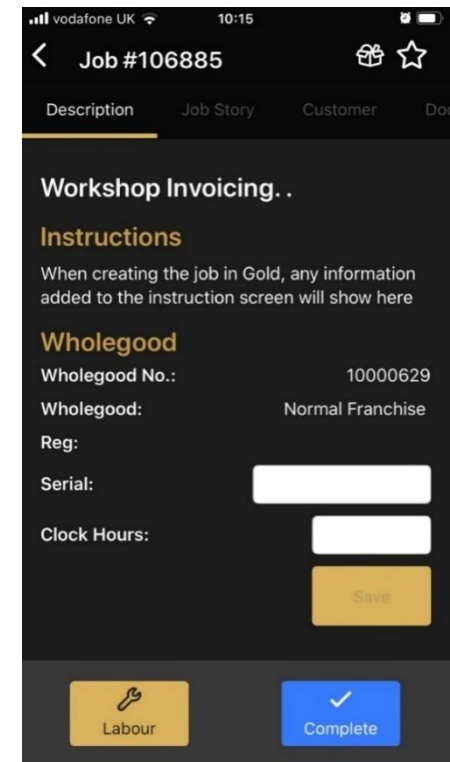
The registration number is populated from the information in Gold and cannot be edited in the App. If it is not entered in Gold, this field will be blank.

### Serial Number

The Serial Number field is a blank text box where engineers can manually enter the machines serial number. This information will show in the Wholegood Tab of the Portal when the job has been completed.

### Clock Hours

The Clock Hours field is a blank text box where the engineers can manually enter the machines clock hours. This information will show in the Wholegood Tab of the Portal when the job has been completed.



## Job Story Tab

The Job Story is the second tab in the Gold Service Mobile App. The screen is split into 2 sections: 'Job Story' and 'My Story'.

### Job Story

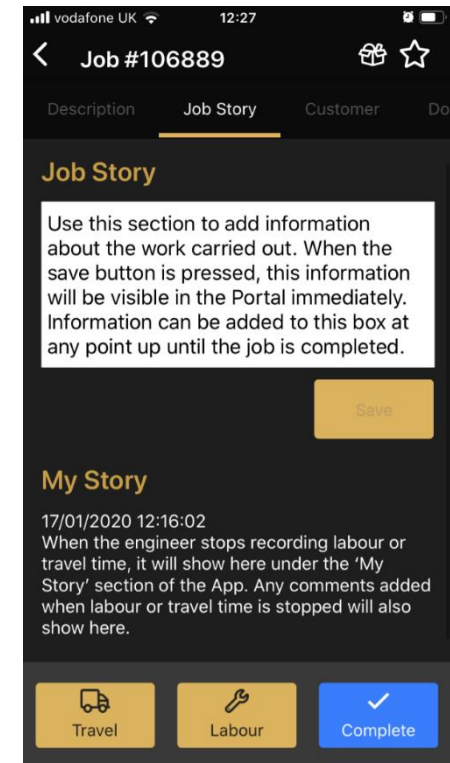
The job story box is a blank text box where the engineer can provide information about the work they have carried out on the job. As soon as they enter the information and press the save button, the data will be visible in the 'Job Story' tab on the Portal.

Please Note: This box will only appear if the customisable job story has been utilised when creating the job in Gold. If this feature has not been utilised, the engineer will not be able to enter information into the text box until the job has been completed. More information on the Customisable Job Story feature can be found in this manual.

### My Story

The 'My Story' section captures all labour and travel time recorded by the engineer, as well as any comments added when they stopped recording time.

This information will appear in the Job Tab of the Portal as soon as the engineer has completed the job.



### Did you know?

Instead of typing the information into the Job Story section, you can 'dictate' it by speaking into the phone. Instructions on how to do this can be found in this manual under the 'Dictating the Story' section.

## Customer Tab

The Customer Screen is the third tab on the Gold Service Mobile App. This screen contains customer details such as:

### Account Number

Shows the customer's account number. The information is populated from Gold and cannot be edited by the engineer.

### Account Name

Shows the name of the customer. The information is populated from Gold and cannot be edited by the engineer.

### Contact Name

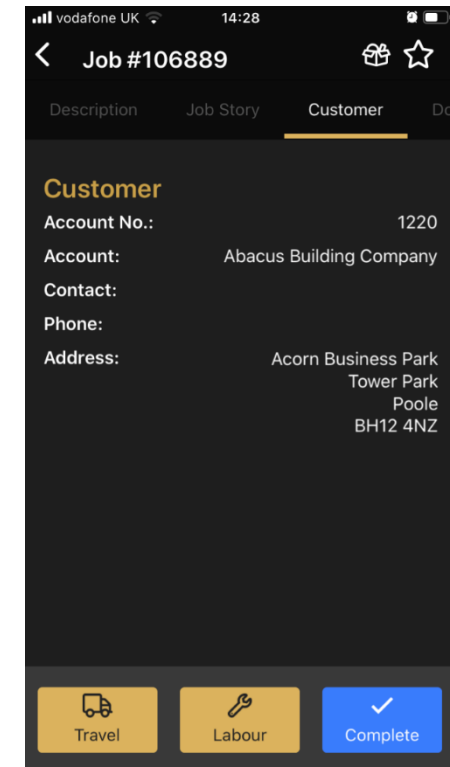
Shows the name of the person the engineer must speak to when on site. This information is populated from Gold and cannot be edited by the engineer.

### Customer Phone Number

Shows the customer's phone number. This information is populated from Gold and cannot be edited by the engineer.

### Customer Address

Shows the location of the customer and where the engineer should go to visit the site. This information is populated from Gold and cannot be edited by the engineer.



### Did you know?

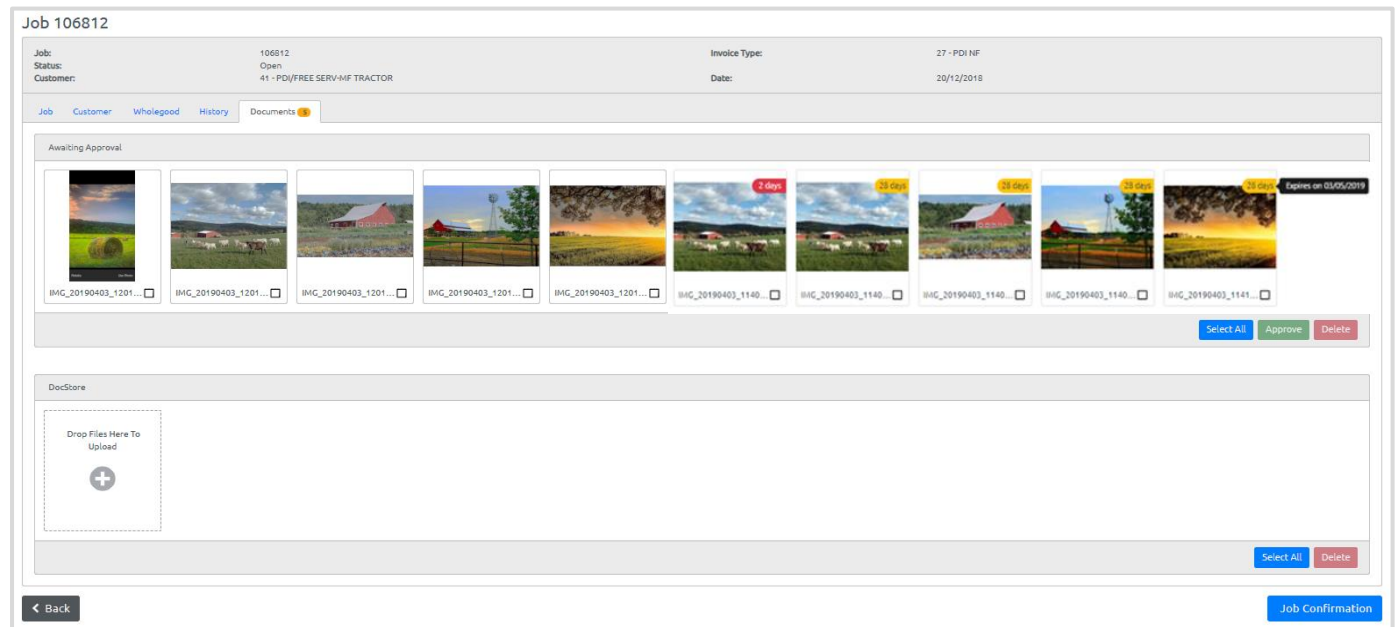
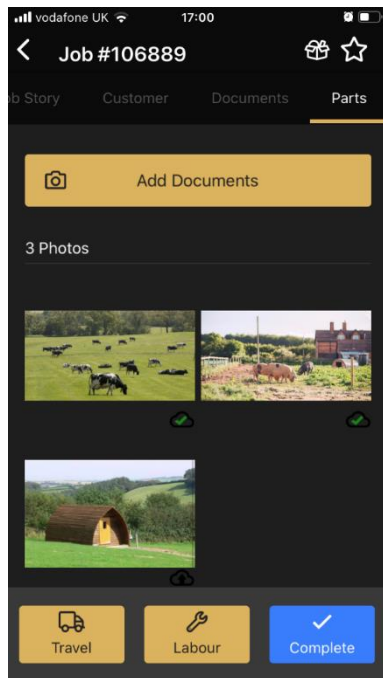
If you are a Gold Service 2 user, you can take advantage of our feature which enables you to dial the customer phone number directly from the App. More information on this feature is shown in this manual.

## Documents Tab

The Documents screen enables engineers to add images to the job in the App. They can choose to take a photo using their phones camera or add images from their existing camera roll.

All images which have been added to the job will show as thumbnails on the screen, and you can view these in 'full screen mode' by clicking on them. From here you can swipe left or right to scroll through the images attached to that job. Images are then sent to the Portal to be approved by the managers.

More information on the Images feature, and how to approve them in the Portal can be found in this manual.



### Did you know?

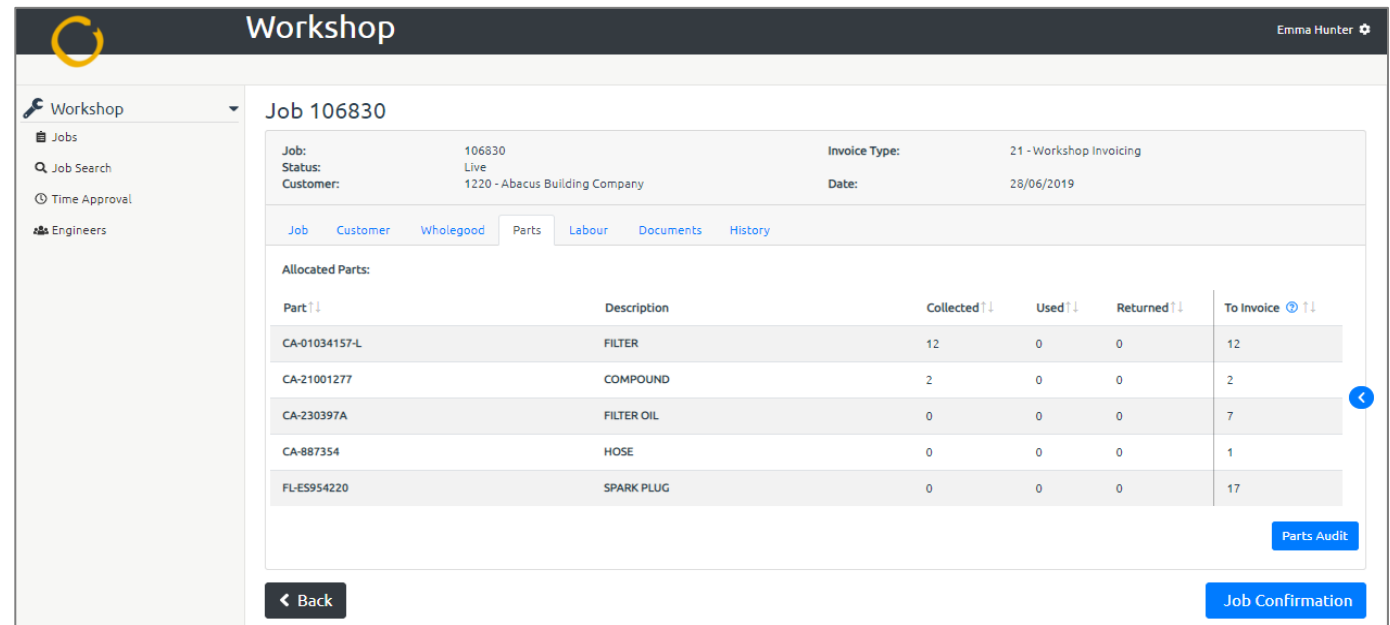
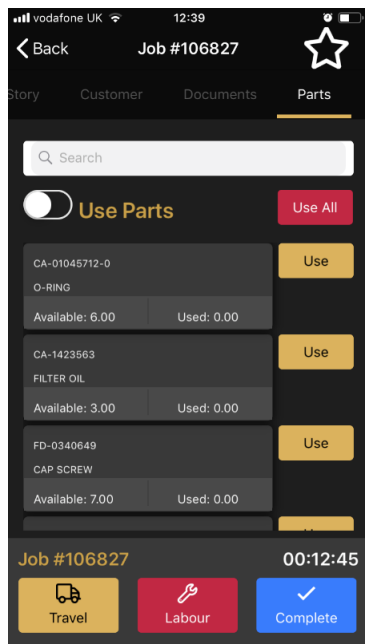
The Images Feature is only available to Gold Service 2.0 users. If you are not a Gold Service 2.0 user, the images tab will not appear in either the App or the Portal.

## Parts Tab

Parts which are allocated to a specific job are now visible in the App for the engineer to mark as collected, used or returned. This information is then updated in the Portal. From here, managers can run a 'Parts Audit' report to keep track of these parts.

Stock can also be allocated to engineers. This is different to parts which have been allocated to a job, and instead acts as 'spare parts' for the engineer to use as and when necessary on any job. This information is then updated in the Portal, where managers can run 'Stock Take' reports and monitor the usage of the allocated parts.

This features a full audit trail of which parts have been collected, used or returned, and allows engineers to be accountable for the parts allocated. More information on the Parts feature can be found in this manual.

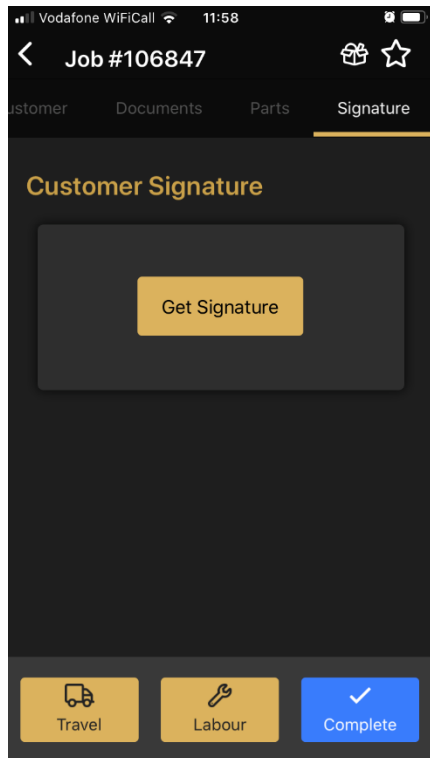


### Did you know?

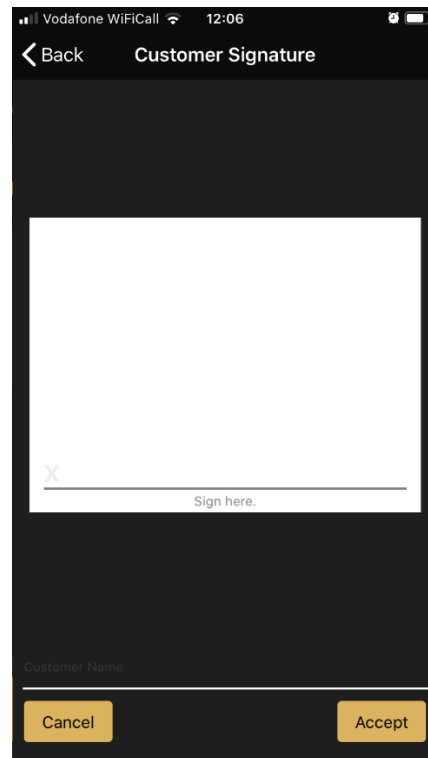
The Parts Feature is only available to Gold Service 2.0 users. If you are not a Gold Service 2.0 user, the Parts tab will not appear in either the App or the Portal.

## Signature Tab

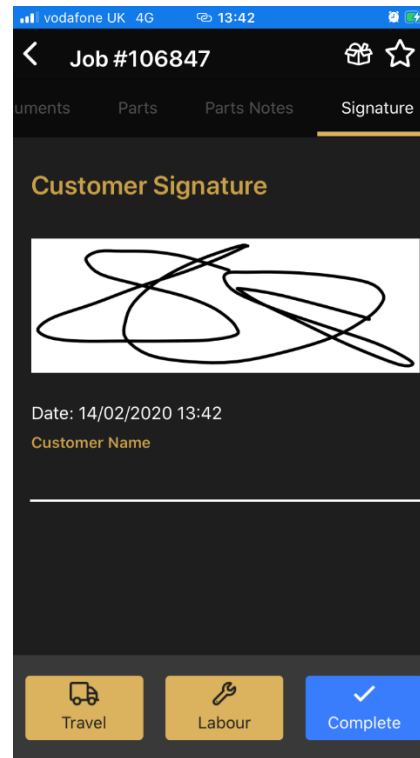
The signature screen allows engineers to capture the customer's signature where necessary. This is especially useful for jobs relating to Warranty.



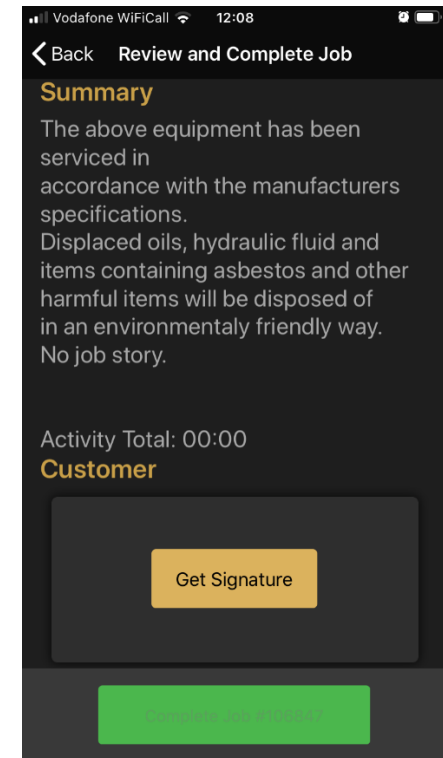
On the signature tab, there will be a 'Get Signature' button. Pressing this will open a new screen with a space for the customer to sign.



Using their finger, the customer can sign their name. When the signature has been captured, press the 'Accept' button.



Once the customer has added their signature, click in the space under 'Customer Name' and add the customer's name.

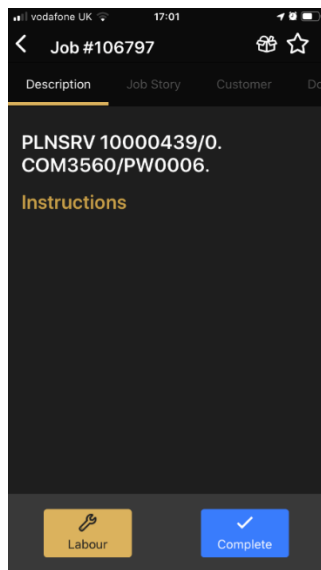


If the engineer tries to complete the job without a customer's signature, they will be prompted to do so on the summary screen.

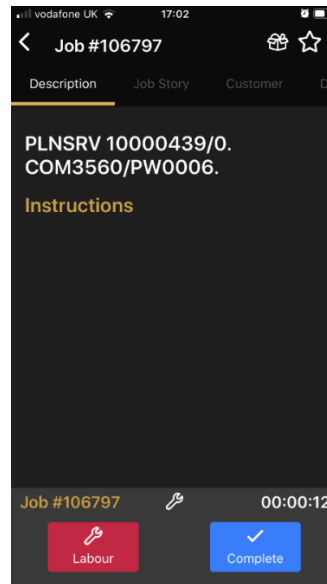
# Using the App

## How to log time on a job in the App

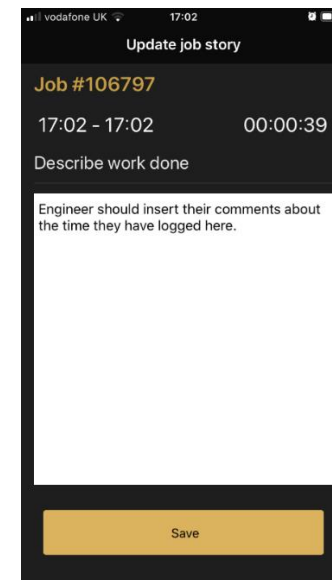
Engineers can log time on a job in the App to show how long they have taken for each activity. This information is then fed back to the portal for the manager to approve. Any comments logged against the time recorded will also show in the portal and can be found next to the labour line in the Time Approval screen.



To start logging time in the app, press the 'Labour' button. The labour button will appear on every screen within the app and can be used at any time.



Time will begin recording in the bottom right hand side of the screen. When time is being logged, the labour button turns red. To stop logging time, press the labour button again.



A labour comments box appears for the engineer to provide information about the time they have logged. Press the save button for this information to reach the portal.

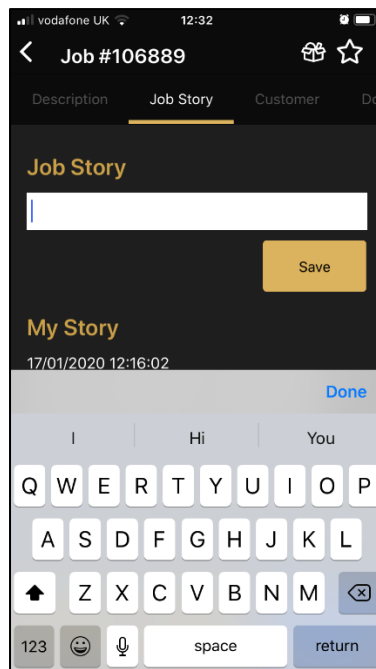


### Did you know?

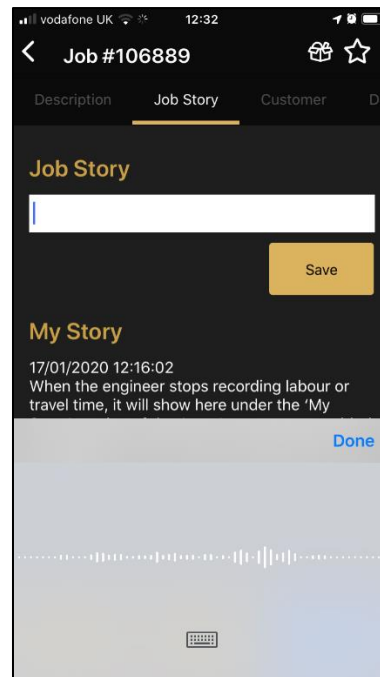
The labour comments should be used to provide information about the time logged – for example, if the engineer forgets to log off of a job, they can add the correct end time to these comments.

## Dictating the Story Feature

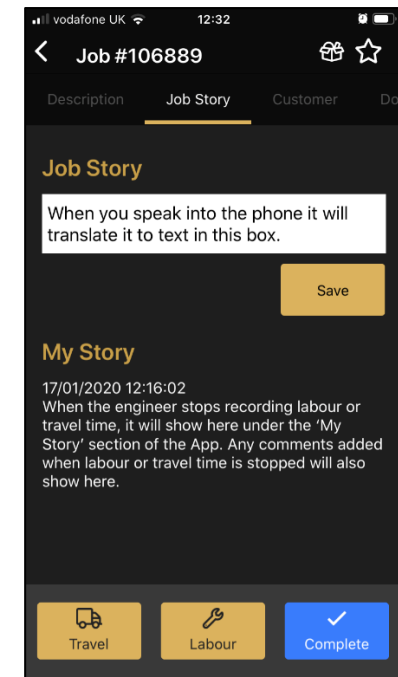
Engineers can add information into the Job Story box by speaking into the microphone. This will translate their words into text, removing the need for them to manually type it in. (The Job Story box can only be used during the job if the customisable job story has been utilised when creating the job in Gold. If not, this box will not be accessible until the job is completed. More information on the Customisable Job Story feature can be found in this manual).



Click in the job story box to make the keyboard appear, then click on the microphone icon



Soundwaves will appear to show it is recording. Press the 'Done' button when finished



What you say will then appear in the Job Story box. Click the 'Save' button to save it



### Did you know?

To use the Dictate Feature, the microphone will have to be enabled on your phone. You can enable it via your settings.



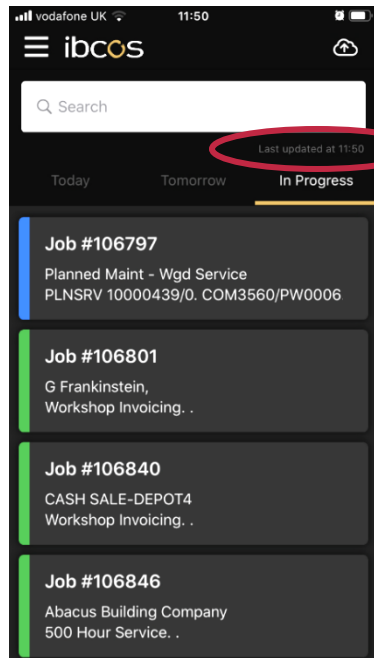
## How to refresh the screen in the App

Engineers must refresh their screens on the Gold Service Mobile App to receive any changes or additions that have been made to their jobs. To help them monitor this, we have provided visibility of the last date and time the App was refreshed.

This information is visible in 2 areas of the App: The home page of the job (which is visible to both Gold Service and Gold Service 2.0 users), and the parts tab in the job (which is visible to only Gold Service 2.0 users) and can be found in the top right-hand corner of both screens (beneath the search bar).

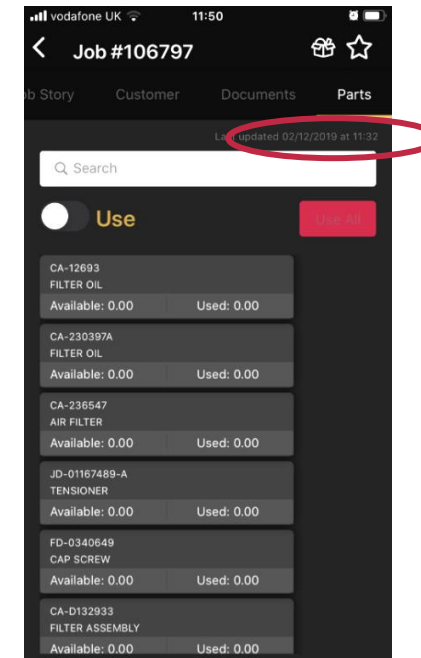
### The home page of the job

visible to both Gold Service and Gold Service 2.0 users



### The Parts tab in the job

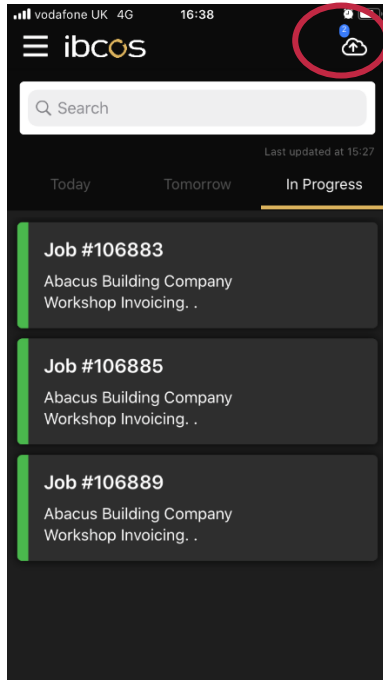
Only visible to Gold Service 2.0 users



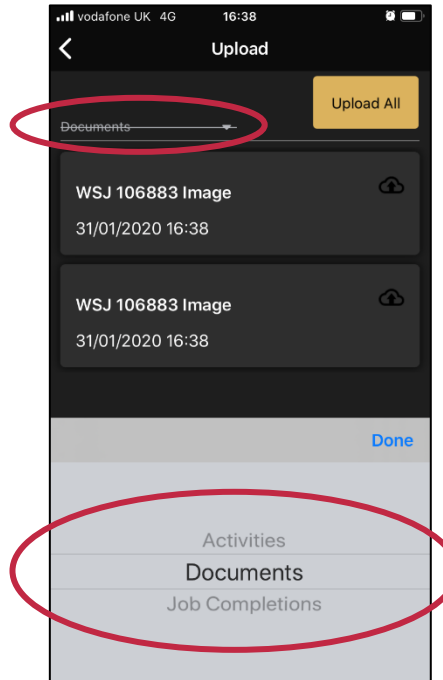
There are two ways an engineer can refresh the screen. If they are in the home screen and have no jobs in their lists, they will see a 'refresh' button. Clicking this will refresh the screen. (If there are jobs in their list, this button will not be visible). Alternatively, in any screen on the App, they can 'pull down' on the screen to refresh it. Whenever the engineer refreshes the screen on the app, the 'last updated' information will be updated.

## How to manually upload items to the Portal

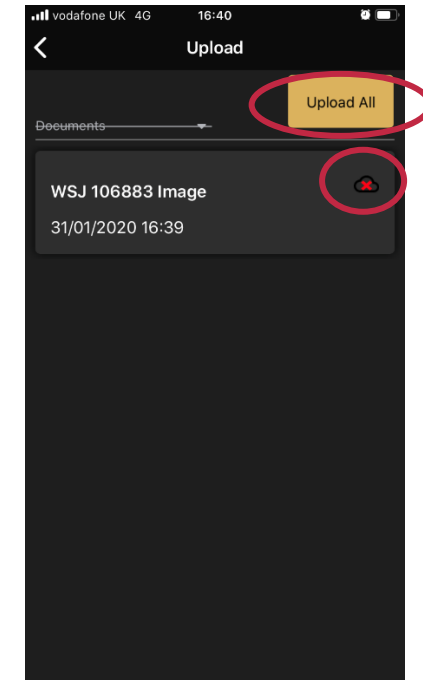
Activities and documents will automatically be sent to the Portal from the App. However, for various reasons this doesn't always happen, so we have enabled them to be manually uploaded. We strongly advise that the engineers check their manual uploads folder at least once a day to ensure any data which has not reached the Portal is sent.



Click on the 'cloud' icon at the top right of the screen to open the uploads folder. Here you will see all the items that have failed to reach the Portal.



It is split into 3 areas: Activities, Documents and Job Completions. It only uploads items for the category you are in, so you must go into each category to upload items.



You can upload items individually by pressing the cloud button next to it. Alternatively, you can upload them all at once by using the 'Upload All' button.



### Did you know?

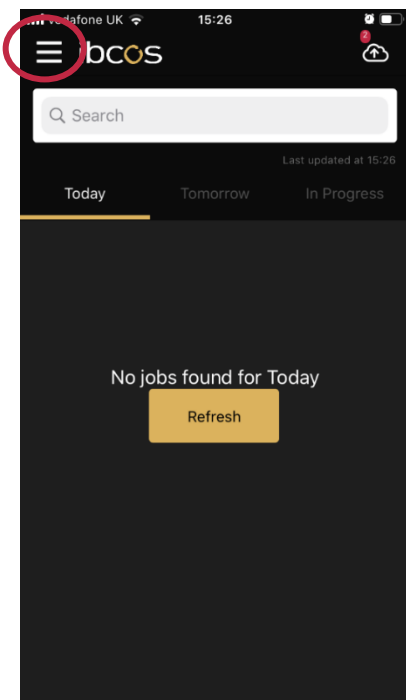
Items from the Activities and Documents category must be uploaded, and Job Completion last. If items from the Job Completion category are uploaded first, it will close the job off in the Portal and any activities or documents associated with that job cannot be uploaded.

# Settings in the App

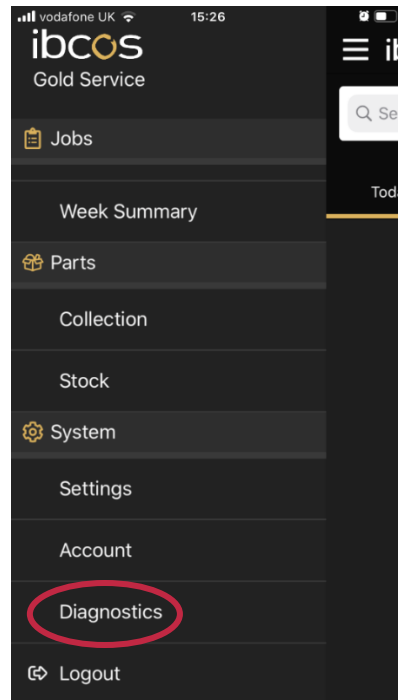
## Clear data button

Gold Service 2.0 now comes with a 'Clear Data' button, which allows the user to clear any user created data but will still retain the individuals log in credentials (such as their email and password etc). This can be used if you are experiencing issues with the App. This should only be used when the App is not active, and no time is being logged.

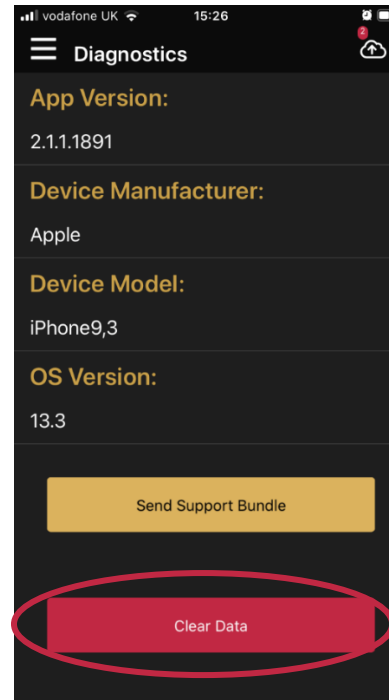
The engineer must upload any outstanding data using the cloud icon to the top right-hand side of the screen, before they use the clear data function.



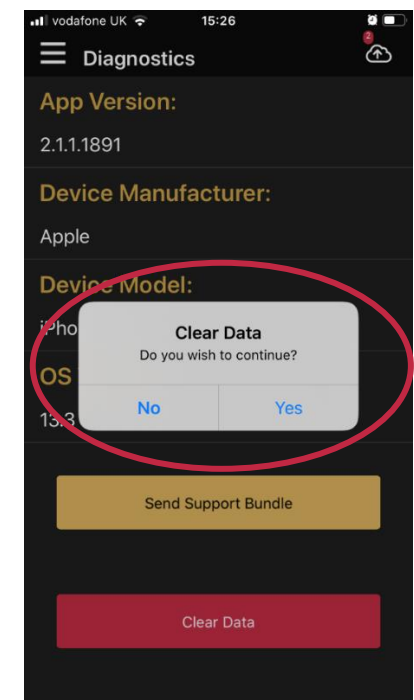
In the homescreen of the App, click on the main menu at the top left-hand side of the screen



This opens the main menu. Go to 'Diagnostics' which can be found under the System section



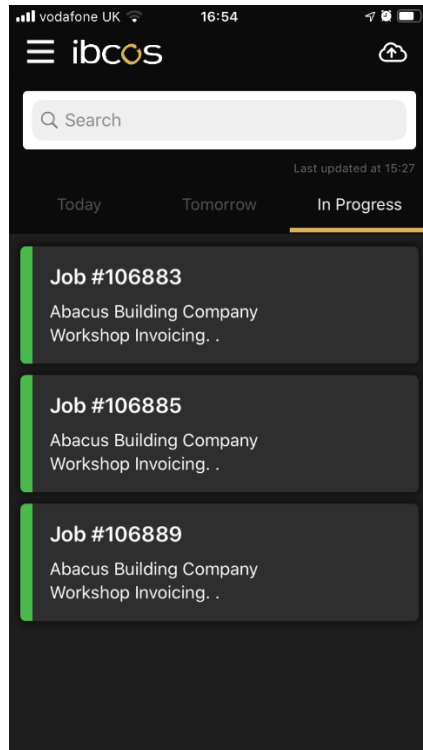
Here you will see the details of the App. The 'Clear Data' button can be found at the bottom of the screen



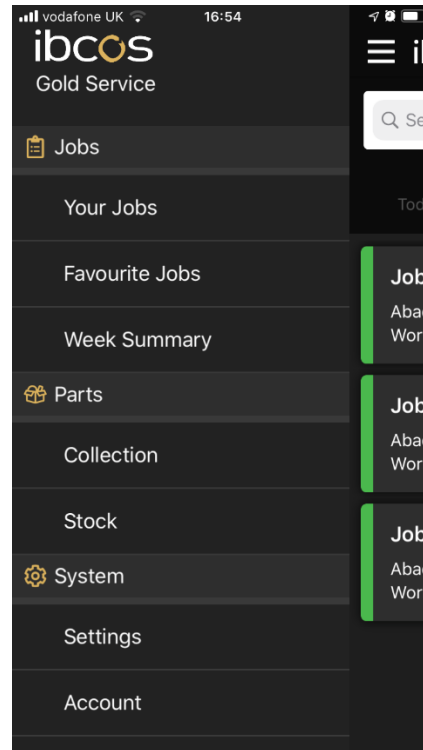
When you click the button, you will be asked if you want to clear the data. Click yes to clear it, and no to exit

## Settings for uploading items

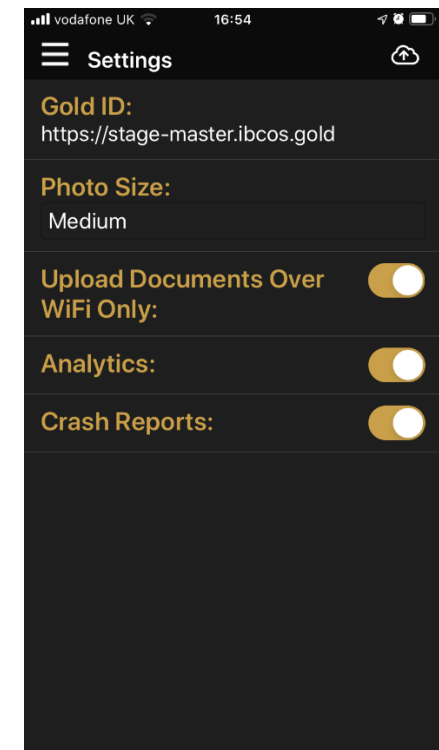
You can choose the settings for uploading items in the App. For example: you can choose to upload over WiFi only to save data, and you can choose the size of the photos you send.



In the Home Screen of the App, open the Main menu



From here, click on the Settings Option to open the settings page



You can choose to upload over WiFi, and select the size of the photos

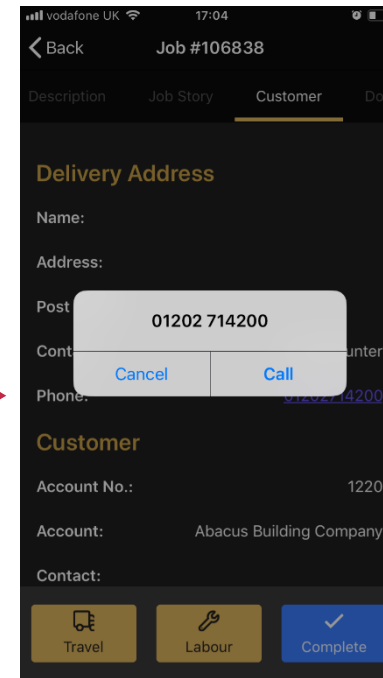
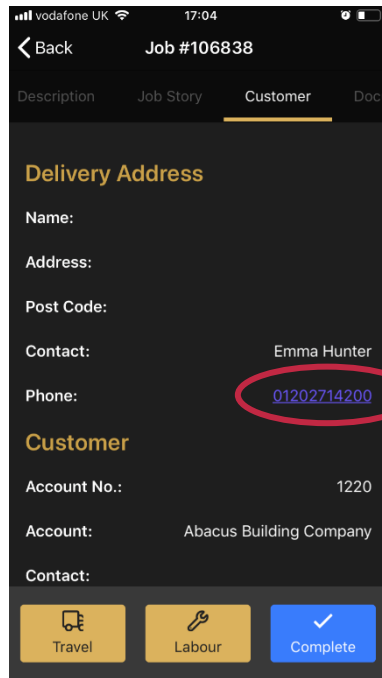


### Did you know?

If you choose to send documents over WiFi only instead of using your data, items will only reach the Portal when you have a WiFi connection.

## Dial phone numbers from the App

For Gold Service 2.0 users, you can now dial phone numbers from within the App. When creating the job in Gold, you can add the customer contact number. The phone number will then appear in blue underlined text in the customer screen in the App. From here, the engineer can click on this number, which will open a dial screen and allow you to make the call. If the phone number is white with no underline, the link to make the call will not work. This will probably be due to the number not being input correctly within Gold.

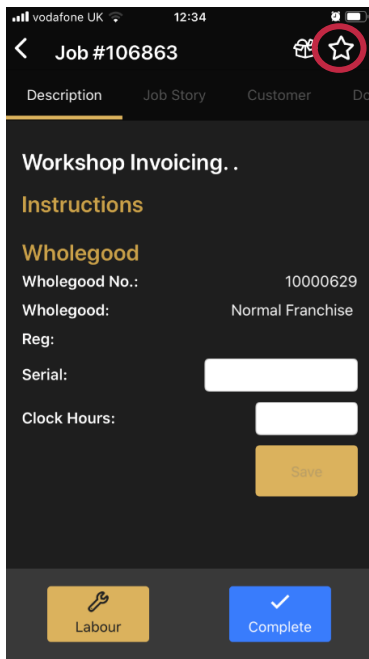


### Did you know?

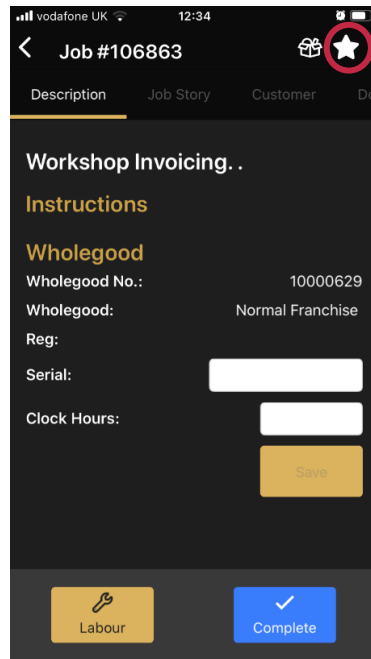
If anything other than numerical values are stored in the phone number field, this function will not work. Always ensure that only numbers are used to populate a phone number when storing contact details.

## Favourites Menu

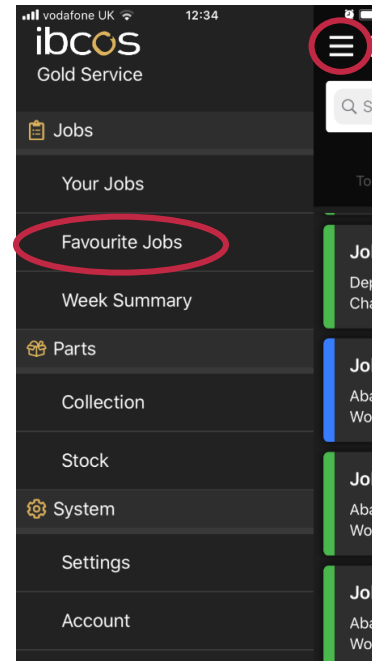
For Gold Service 2.0 users, engineers can now mark jobs as 'favourites', adding them to their favourite jobs folder. This feature has been designed to reduce the need for engineers to search for jobs that are no longer visible on their today or tomorrow screens. The process to add jobs to their favourites folder is simple:



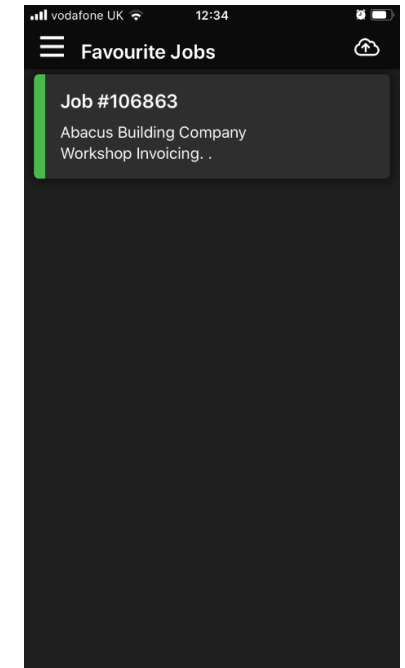
Open the job you want to add to the favourite job menu. There will be a star in the top of the screen.



Click on it and It will turn white. This means that the job has now been added to the favourite jobs folder.



Go to the home screen and click on the menu at the top of the screen. You will see the favourite jobs folder.




In this folder will be a list all of jobs marked as 'favourite'. Open the jobs by clicking on them.

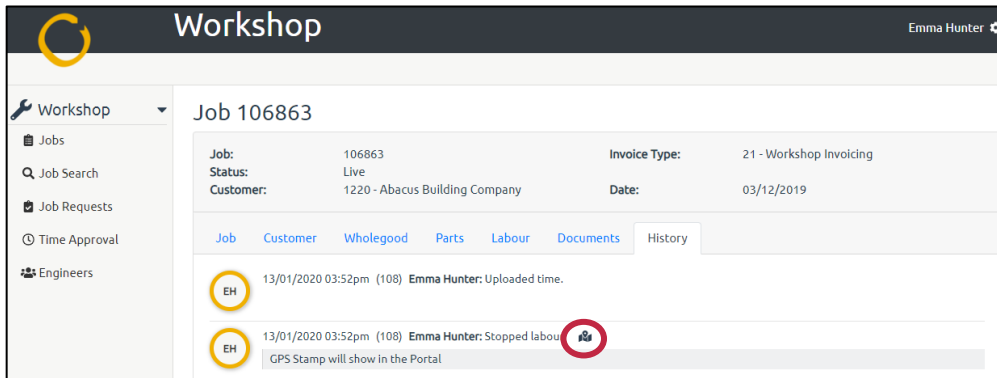


### Did you know?

To remove a job from the favourite job menu, simply open the job, and click on the star again. When it turns black with a white outline, it will have been removed from this list.

# GPS Stamp Location Feature

For Gold Service 2.0 users, you will be able to see the location of the engineer when they start and stop logging time. To see this information, go to the History tab within the job. Next to any 'stopped labour' entries, you will see this icon: 




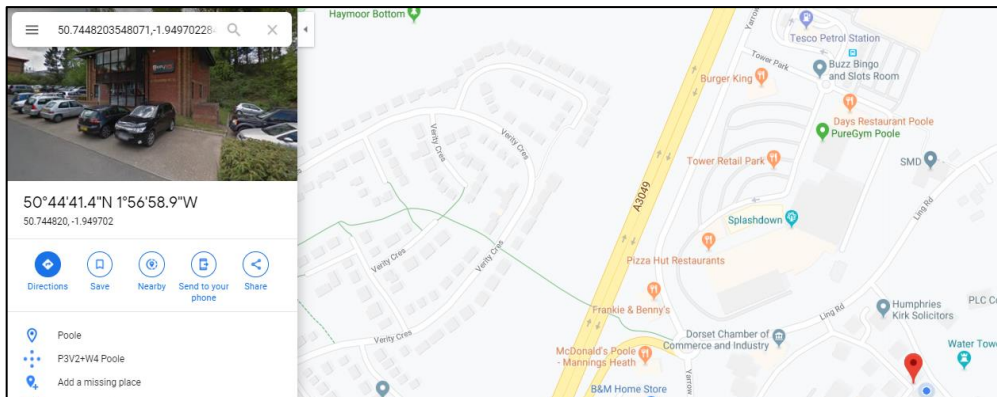
**Workshop** Emma Hunter

Job 106863

Job: 106863 Invoice Type: 21 - Workshop Invoicing  
 Status: Live  
 Customer: 1220 - Abacus Building Company Date: 03/12/2019

Job Customer Wholegood Parts Labour Documents History

EH 13/01/2020 03:52pm (108) Emma Hunter: Uploaded time.  
 EH 13/01/2020 03:52pm (108) Emma Hunter: Stopped labour   
 GPS Stamp will show in the Portal

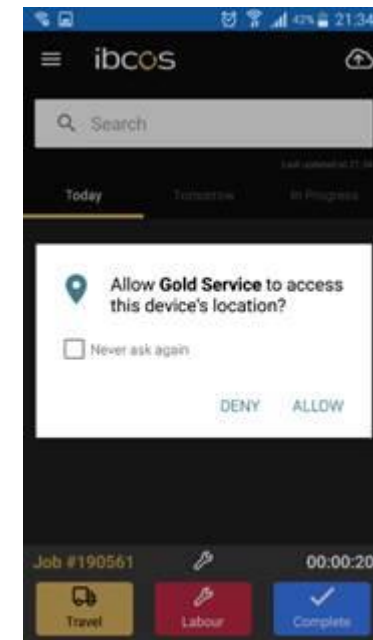



50.7448203548071, -1.94970228

50°44'41.4"N 1°56'58.9"W  
50.744820, -1.949702

Directions Save Nearby Send to your phone Share

Pool  
 P3V2+W4 Poole  
 Add a missing place



ibcos

Search

Today Tomorrow In Progress

Allow Gold Service to access this device's location?  
 Never ask again

DENY ALLOW

Job #190561 00:00:20

Travel Labour Complete



## Did you know?

Engineers must grant Gold Service permission to access their devices' location for this feature to work. They will need to turn the phones OS Locations Services to 'On' in their settings menu. When they first start to log time on the App, a notification will appear asking for permission to log their location. They can grant or deny permission for this feature using this notification. Please note, if they click the 'Allow' option on this notification, but their OS Location Services are set to 'Off' in their settings menu, this function will not work.

## Add images to jobs in the App

For Gold Service 2.0 users, you can now add images to jobs in the App via 2 methods: taking a photo directly in the app or choosing one from your camera roll.

Please note: if it is your first time using this function, you will see a message appear on the screen asking you if Gold Service can access your photos. Please press 'ok' to this option.

All images which have been added to the job will show as thumbnails on the screen. If you click on a thumbnail, it will open the image in 'full screen mode', and from here you can swipe left or right to scroll through all images attached to that job.

If you have Wi-Fi connection, all images will be sent to the portal as soon as they have been added to the job. If you do not have Wi-Fi, the images will sit in a queue and will be sent as soon as you have connection. You can see the status of each image by the icons next to their thumbnails:



This symbol indicates the image has not yet been sent to the Portal



This symbol shows the image has attempted to reach the Portal, but it has failed



This symbol shows the image has been sent to the Portal successfully

### Approve images in the Portal

Once the images have reached the Portal, they will need to be 'approved' to enable you to send them to the Docstore. All images will sit on the portal for a maximum of 30 days, before they are removed. If they have not been sent to the Docstore within this time, they will disappear completely. Note: Sending the images to the Docstore is subject to a Docstore being licensed. If you do not have one licensed, you will not be able to save any items within the Docstore.

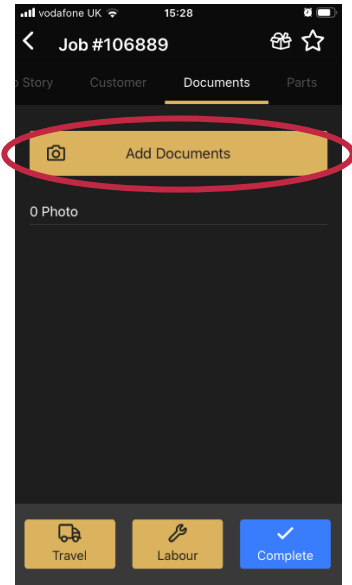


#### Did you know?

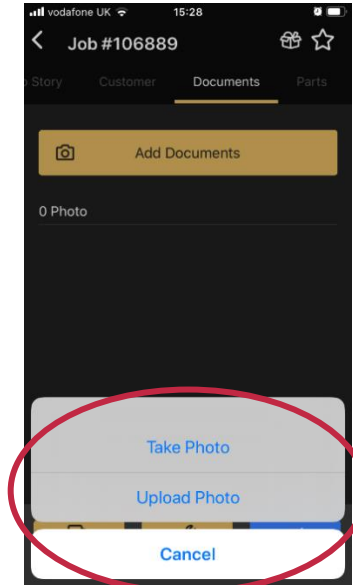
You can choose to send images to the portal over WiFi only in the settings on the App. This will then send images to the Portal if you have connection. If there is no Wi-Fi they upload as soon as there is connection. If you untick this option, images will be sent using the phones data. The Images then stay in the Portal for 30 days. If they are not sent to the Docstore in this time, they will disappear.



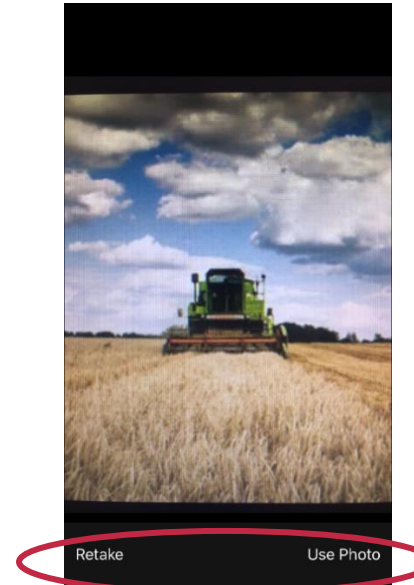
## How to add images to jobs



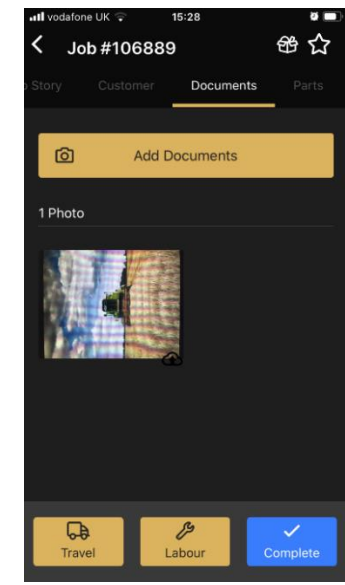
In the Documents Tab, add images to the job by clicking the 'Add Documents' button at the top of the screen.



'Camera Roll' allows you to add photos from your photo gallery. 'Take Photo' opens the camera function



If you choose 'Take Photo', you have the option to re-take it or use it. The look of this feature may vary across devices



Photos will show as thumbnails. Click on an image to open it in full screen mode and scroll through them.

If there is Wi-Fi connection, all images will be sent to the portal as soon as they have been added to the job. If there is no Wi-Fi connection, the images will sit in a queue and will be sent as soon as connection is available. You can see the status of each image by the icons next to their thumbnails:



image has not been sent to the Portal




image has failed to reach the Portal



image has reached the Portal

## Approve images in the Portal

When an image has been uploaded to the Portal, you will see a yellow 'document' icon next to the job. This indicates it has documents awaiting approval. This icon will disappear once you have approved all the documents.

Jobs				
All Depots ▾		Type to Search		Clear
In Progress (20)		Logged (0)		
Type ↑↓	ID ↑↓	Description ↑↓	Account Name ↑↓	Contact Name ↑↓
27	106796	PDI New Equipment 10000771	PDI/FREE SERV-MF TRACTOR	
P4	106797	PLNSRV 10000439/0 COM3560/PW0006	Planned Maint - Wgd Service	

In the job, you will see a new Tab called 'Documents'. If you have images or documents that require your approval, you will see a yellow circle with the number of outstanding items shown in it. When all the documents have been approved, the yellow circle will disappear.

### Job 106812

<b>Job:</b>	106812	<b>Invoice Type:</b>	27 - PDI NF
<b>Status:</b>	Open	<b>Date:</b>	20/12/2018
<b>Customer:</b>	41 - PDI/FREE SERV-MF TRACTOR		

[Job](#)
[Customer](#)
[Wholegood](#)
[History](#)
[Documents 5](#)



### Did you know?

Images stay in the Portal for 30 days. If they are not sent to the Docstore in this time, they will disappear.

In the Documents tab, the screen is split into 2 sections: 'Awaiting Approval' and 'Docstore'. Items in the 'Awaiting Approval' section have not yet been sent to the Docstore. **Note:** Documents will only be held in the 'Awaiting Approval' section for a total of 30 days. If you have not sent the items to the Docstore within that time, they will disappear from the Portal. Sending the images to the Docstore is subject to a Docstore being licensed. If you do not have one licensed, you will not be able to save any items within the Docstore.

Images will show as thumbnails and when you click on an image, it will open in 'full screen mode'. From here you can scroll through all the image within that section of the screen.

Each thumbnail in the 'Awaiting Approval' section will have a yellow bar across the top of it showing the number of days remaining until it will expire. When it reaches 7 days or less, this bar will turn red. If you hover over this bar with your mouse, it will show the exact date that the image will expire and be removed from the Portal. The bar will disappear once the image has been approved and sent to the Docstore.

If you hold the mouse over each thumbnail, you will see a blue arrow appear in the bottom right hand corner of the item. Clicking on this arrow allows you to download the item to your computer.

Next to each thumbnail, you will see a 'tick box'. Selecting it will allow you to complete an action on that image using the buttons shown on the screen:

Select All

The 'Select All' button allows you to select all the thumbnails within that section of the screen



Approve


The 'Approve' button sends all selected thumbnails to the Docstore. Once this has been done, the selected thumbnails will move to the 'Docstore' section of the screen

Delete

The 'Delete' button allows you to delete all the selected thumbnails within that section of the screen

Once you have actioned all the items in the 'Awaiting Approval' screen, 3 things will happen:

- The split screen will disappear, and you will see one screen with thumbnails of all the documents that have been sent to the Docstore
- The document icon on the home page of the portal will disappear from that job 
- The yellow circle on the documents tab will disappear 

**Note:** In this screen you will see a blank image box with a  symbol in the middle of it. When you press this, it will open up the documents folder on your computer and allow you to upload an image or document from your saved files.

Click on this box to upload items from your computer. You can also drag and drop items onto this section

Click on the tick boxes to select the images. To select all images at once, click the blue 'select all' button to the right

The yellow expiry bar shows the number of days until the image expires. It turns red with 7 days or less remaining.

If you hover over the expiry bar, it will show the full date of when the image is set to expire

The screenshot shows the 'Awaiting Approval' section of the iBCOS interface. At the top, job details for Job 106812 are visible, including status (Open), customer (41 - PDI/FREE SERV-MF TRACTOR), invoice type (27 - PDI NF), and date (20/12/2018). Below this, a grid of images is displayed, each with a yellow expiry bar indicating the number of days remaining. A red circle highlights a tick box on the fourth image, and another red circle highlights a red expiry bar on the seventh image. A third red circle highlights a tooltip that appears when hovering over the expiry bar, showing the full date 'Expires on 01/05/2019'. A fourth red circle highlights the 'Drop Files Here To Upload' box in the 'DocStore' section. At the bottom of the grid, there are buttons for 'Select All', 'Approve', and 'Delete'. A 'Back' button is located at the bottom left, and a 'Job Confirmation' button is at the bottom right.



### Did you know?

If you hover your mouse over an image, you will see a blue arrow appear. Click on this arrow to download the image to your computer.

# Parts Feature

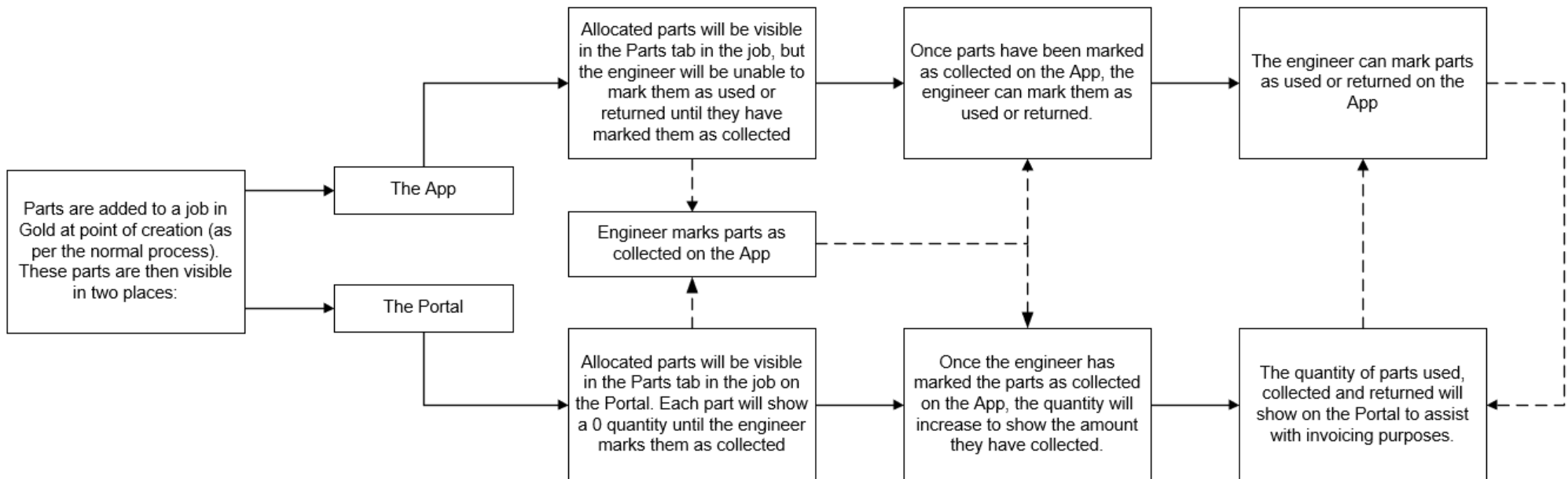
Our Parts Feature allows Engineers to mark parts as collected, used and returned on the App, and this information will feed back into the Portal where the managers can view this information for invoicing purposes, as well as creating stock take reports of the parts for auditing purposes.

When parts are allocated to a job in Gold, they will be visible in 2 places: The App and The Portal.

**The App:** The engineer will see the list of parts within the job on the App. However, until the engineer marks the parts as collected on the App then, although they will see them on the job, they will not be able to do anything with them. Once they have marked them as collected, they will be able to mark them as used or returned.

**The Portal:** The list of parts will be visible within the job on the Portal. However, until they have been marked as collected on the App, the collected, used and returned quantities will show as zero. Once parts are collected on the App, the collection quantities will increase accordingly, and when they are marked as used or returned in the App, the quantities in the used and return columns in the Portal will increase accordingly.

This flow chart shows the process for the Parts feature.



## Parts Feature – Portal Overview

To see parts that have been allocated to a job on the Portal, open the job and click on the Parts tab. This page shows all parts collected, used, and returned and the information can be useful for invoicing purposes. You will see a 'Parts Audit' button to the bottom right hand side of the screen. This will provide a read only report showing an audit trail of the parts.

**Workshop** Emma Hunter

Job 106830

Job: 106830 Invoice Type: 21 - Workshop Invoicing  
 Status: Live  
 Customer: 1220 - Abacus Building Company Date: 28/06/2019

Job Customer Wholegood **Parts** Labour Documents History

Allocated Parts:

Part	Description	Collected	Used	Returned	To Invoice
CA-01034157-L	FILTER	12	0	0	12
CA-21001277	COMPOUND	2	0	0	2
CA-230397A	FILTER OIL	0	0	0	7
CA-887354	HOSE	0	0	0	1
FL-ES954220	SPARK PLUG	0	0	0	17

Parts Audit

Back Job Confirmation

**Parts Notes:**

Information added to the parts notes screen will show in here once the job has been completed in the App.

Before the engineer has marked the parts as collected on the App, the quantity for each part will show as zero. Data is only shown for parts that have been marked as collected. If you allocate 10 parts to the job but the engineer only marks 7 as collected on the App, the data on this screen will only include those 7 parts. We recommend the engineer marks all parts allocated as collected when they start the job, and then marks them as used or returned as necessary.

If the engineer uses parts from their Van Stock, it will show on this screen. If they use parts which are the same as a part already allocated to the job, the quantity of that part line will increase accordingly. If they allocate parts which have not already been allocated to the job, the data will show as a new line.

If you want to add any notes in relation to these parts, you can do so by clicking the blue arrow to the right-hand side of the screen. This opens a notes section where you can store information.

## Parts Feature - Engineers Screen (Stock Tab)

The Stock Tab will show you all the stock allocated to the engineer. Before you can allocate stock, you will need to assign a Van Stock job to them. You can do this by either creating a new Van Stock job, or by allocating an existing Van Stock job to them.

To create a Van Stock job (1), choose a number in the Stock Job ID tab, and the Stock Account that you want to allocate the stock to. If the Stock Job ID is already taken, the box will go red and you will not be able to press the 'create' button. Choose a number that is available, and the box will go green allowing you to click on the 'create' button to proceed. To allocate the stock to an existing Van Stock job (2), simply pick the existing job from the drop-down box and click the 'Assign' button.

Once a Van Stock job has been assigned, the engineer will need to log out of the app and log back in again for it to take effect. Once you have allocated a Van Stock job to that engineer, you will not need to do it again, and they can use the same Van Stock job forever. However, should you allocate a new Van Stock job to an engineer (replacing the old one), then they will need log out of the app and log back in again for it to take effect.



### Did you know?

Certain criteria must be set up in Gold to allow the Van Stock module to work correctly. This will be handled by an Ibcos representative during set up.

## Parts Feature - Engineers Screen (Stock Tab – View allocated Van Stock)

Once you have assigned a Van Stock job to an engineer, you will be able to see all stock allocated to them. To do this, click on the Stock Tab. You will see 2 buttons to the right of the screen: Unassign and Stock Take.

If you click the 'Unassign' button, it will revert back to the Van Stock set up screen (shown on the previous page of this manual), and you will need to assign a Van Stock job to the engineer again before you can allocate stock to them.

If you click the 'Stock Take' button, it will open a PDF report of all stock allocated to that engineer.

You will see a 'Parts Audit' button to the bottom right hand side of the screen. This will provide a read only report showing an audit trail of the parts.

Please note: Both the stock tab and the Stock Take report are for viewing purposes only and cannot be amended.

The screenshot shows the 'Workshop' interface for 'Engineer Emma Hunter | 333'. The 'Stock' tab is active, displaying 'Van Stock Job No: 1VS012'. A table lists the allocated parts:

Part	Description	Quantity
CA-01067489-A	TENSIONER	3
CA-12693	FILTER OIL	1
CA-C46892	BEARING	7

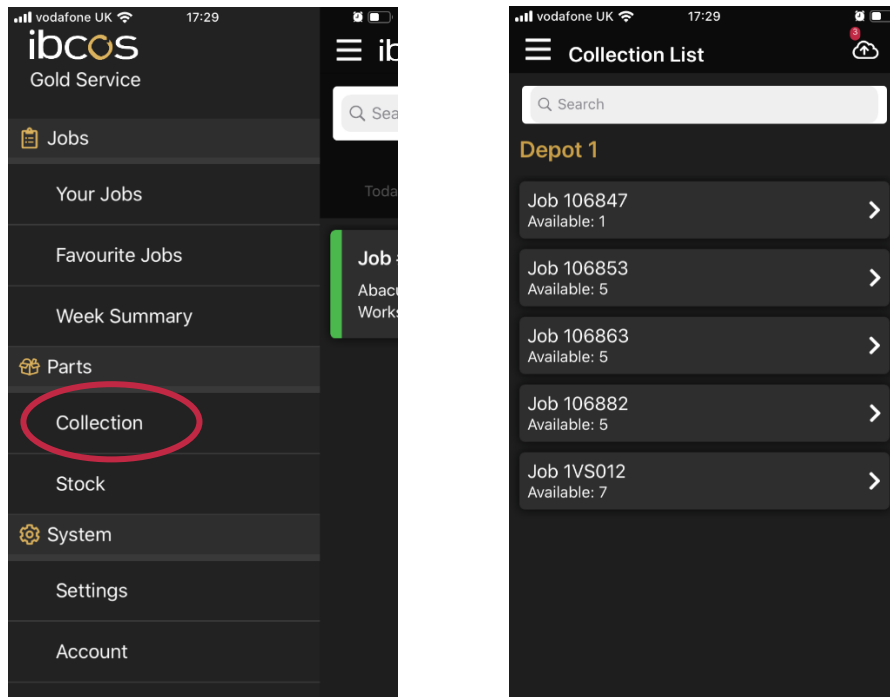
Buttons for 'Unassign' and 'Stock Take' are circled in red at the top right. A 'Parts Audit' button is circled in red at the bottom right. A 'Back' button is located at the bottom left.



## Parts Feature – App Overview

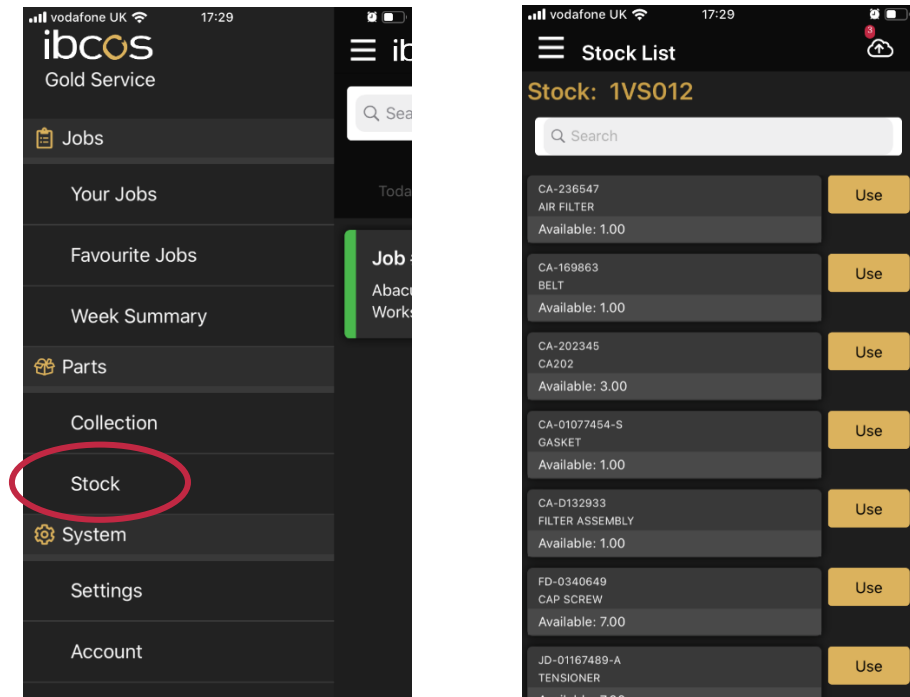
The Parts section in the side menu on the App is split into two main areas: Collection and Stock. To access either area, click on the menu icon at the top left-hand side of the screen to open the side menu.

### COLLECTION SCREEN



The 'Collection' screen shows all parts specifically Allocated to a job which need to be marked as collected before they can use them on the job.

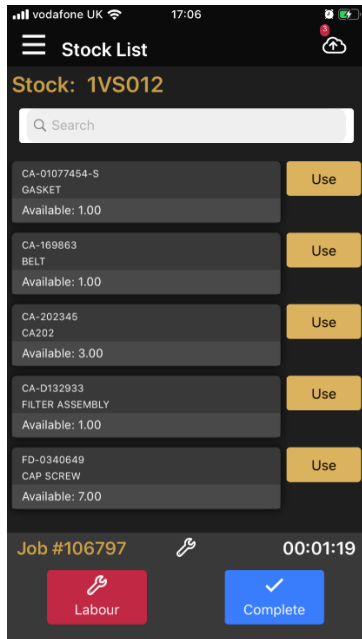
### STOCK SCREEN



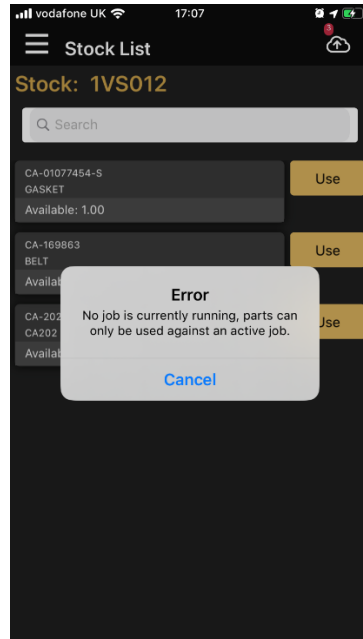
The 'Stock' screen shows a list of the engineers personal Van Stock, which is available for them to use as and when necessary against any job.

## Parts Feature – Allocate stock to a job on the App

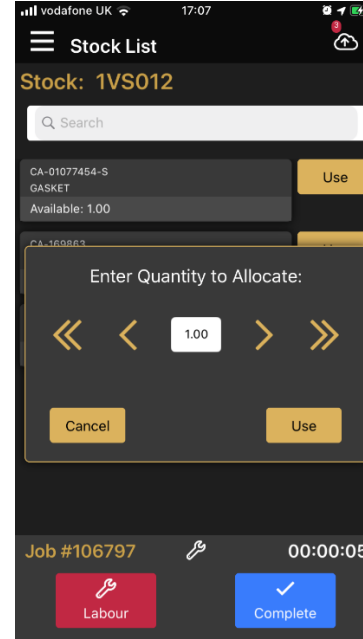
You can allocate parts to a job from your personal Van Stock. Open the menu in the left-hand side of the screen to open the side menu and click 'Stock'.



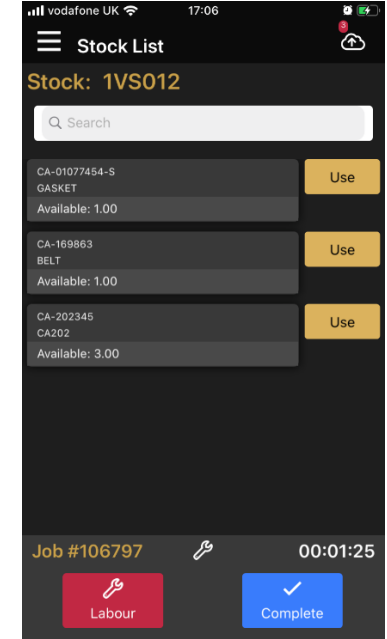
You will see a list of all the parts in your personal stock. The 'available' quantity shows how many you have to use of each part. This number will decrease as you allocate the parts to jobs.



You can only allocate stock to a job if you are logging time against it. If not, you will see an error message appear which says: 'No job is currently running, parts can only be used against an active job'.



Open the job you want to allocate stock to and start logging time. Go back to your stock and select the parts you need. Press the 'Use' button, choose the amount you want to allocate and press 'Accept'.



The available quantity will decrease to reflect the amount used. Once the full quantity of the part is used, it disappears from the screen entirely. Allocated parts are now available on the job.



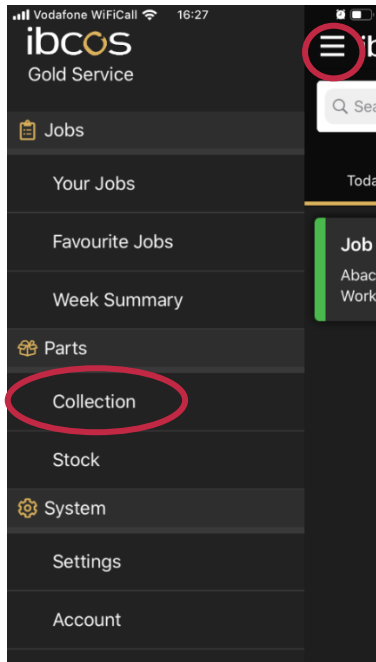
### Did you know?

The < > arrows increases the amount by 1, and the << >> arrows increases the amount by 10.

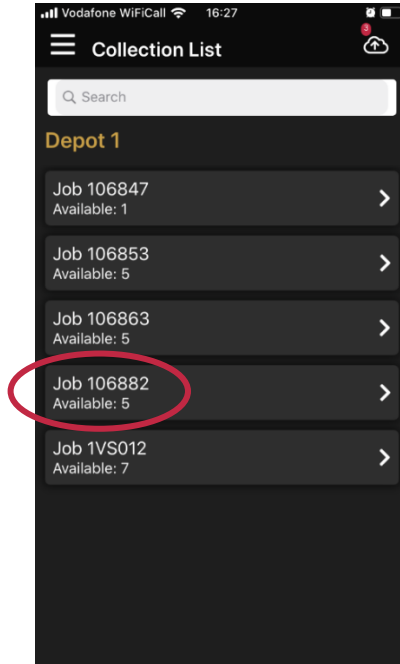
For any parts that have decimal quantities, you can increase or decrease the amount collected by a value of 0.1 by pressing the < > arrows

## Parts Feature – Mark parts as collected on the App

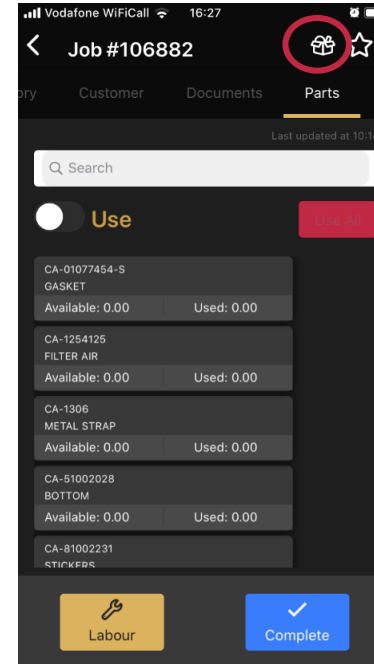
The engineer will see the list of parts allocated to the job on the App. However, to be able to use these parts on the job, the engineer must mark them as collected first. Parts that have not been marked as collected will be visible in the job, but the used and returns buttons will be disabled



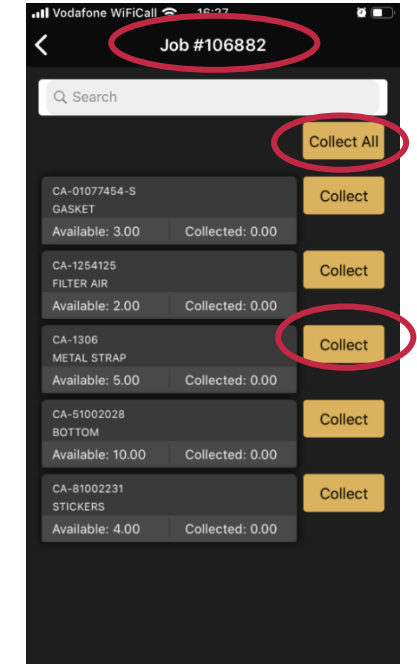
To mark parts as collected, click on the menu at the top of the screen to open the side menu. From here, click on 'Collection' option in the 'Parts' section.



This opens a new screen and will show all the jobs which have parts awaiting collection. Click on the job you want to open the parts collection screen.



Alternatively, you can jump straight to the collection screen from the job by pressing the 'box' icon at the top of the screen. This will take you directly to the collection screen.



Collect parts individually, or collect all parts at once by using the collect all button. Note: once you have marked parts as collected you cannot undo this.

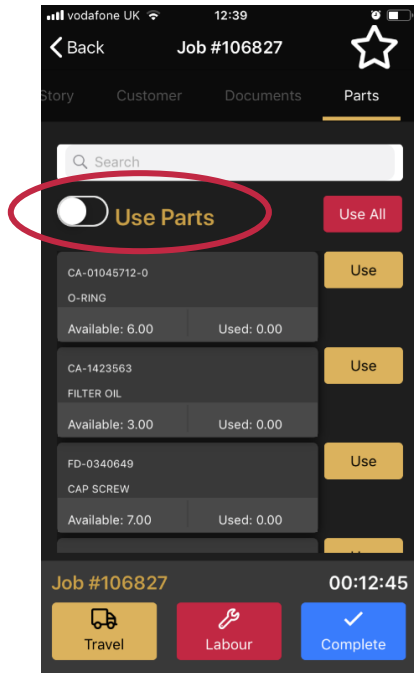


### Did you know?

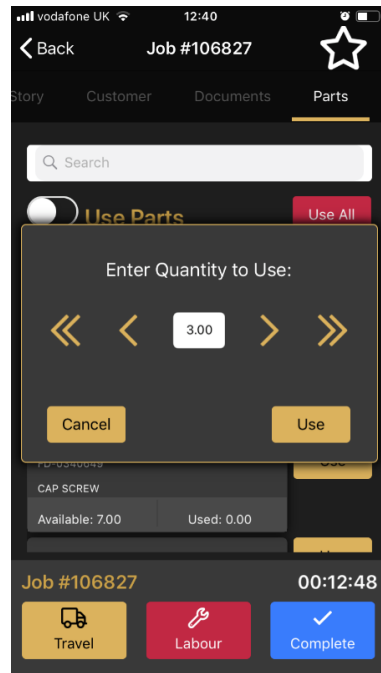
Only parts which have been collected in the App will show on the Parts screen in the Portal. We recommend that the engineer collects all parts allocated to the job, and then marks them as used or returned in the App to ensure everything has been accounted for in the Portal.

## Parts Feature – Mark parts as used on a job in the App

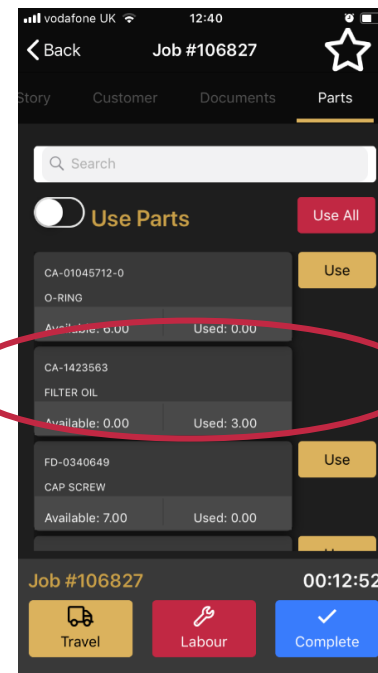
Engineers will see the list of parts within the job on the App. They must mark them as collected before they can mark them as used or returned on the job.



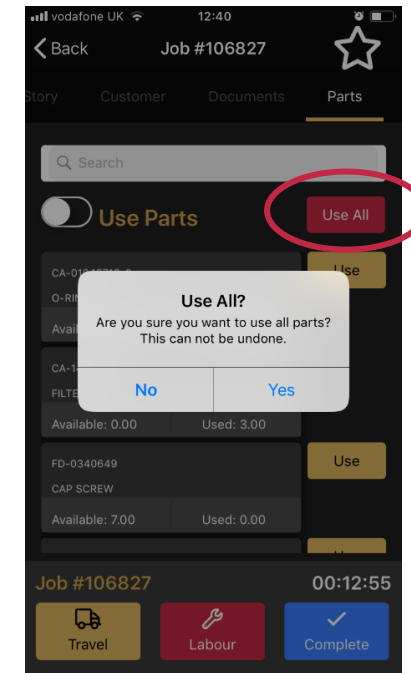
In the job, scroll to the 'Parts' tab to see all parts allocated to the job. Switch between the 'Use' and 'Return' screen by clicking the toggle button.



To use a part, press the 'Use' button, choose the amount you want then click 'Use'. The quantity and available numbers will change to reflect what has been used.



When the total quantity of the part is used, the use button disappears. Note: Once you use a part in the app you cannot undo it – this will have to be done in the Gold.



To use all parts at once, press the 'Use All' button. A message will appear asking if you're sure you want to use all. Remember, this action cannot be undone in the App.



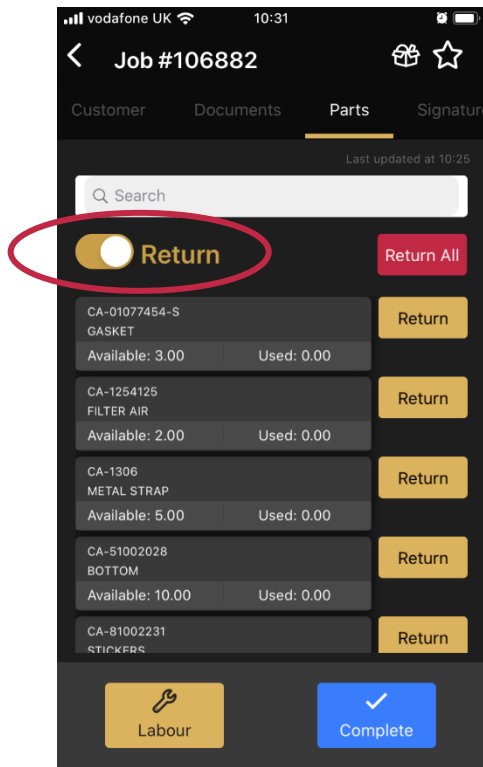
### Did you know?

The < > arrows increases the amount by 1, and the << >> arrows increases the amount by 10. For any parts that have partial quantities, you can increase or decrease the amount collected by a value of 0.1 by pressing the < > arrows

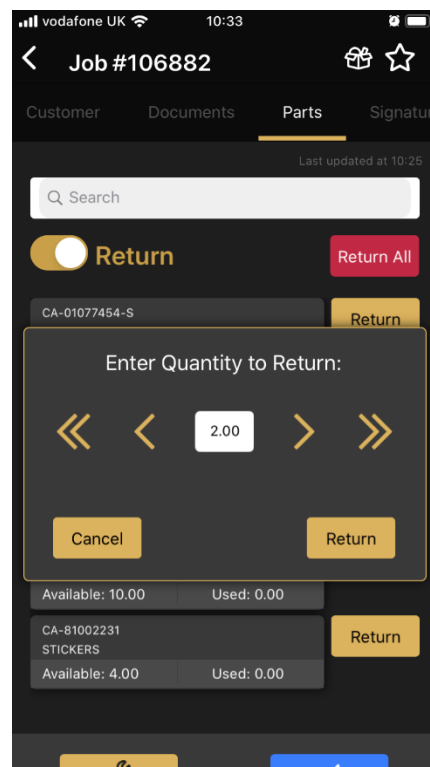
If you don't assign a Van Stock job to an engineer, they will see the list of parts on the job but will not be able to do anything with them.

## Parts Feature – Mark parts as returned on a job in the App

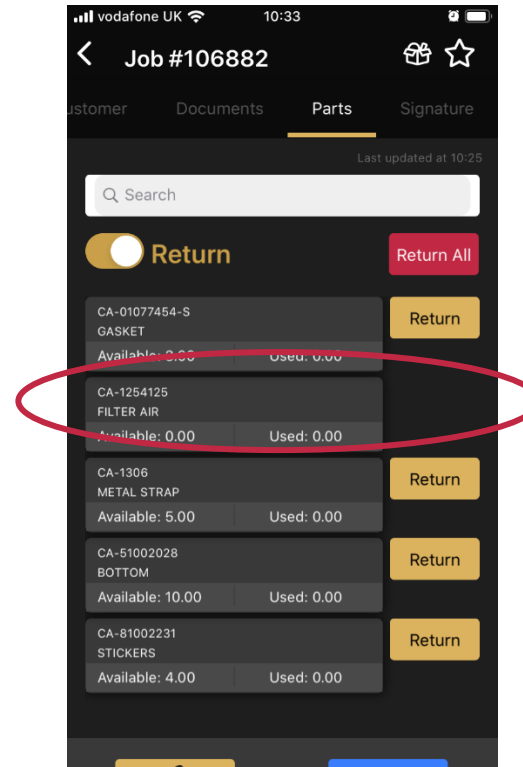
Any parts that are not required on the job should be marked as returned by the engineer in the App. This will then show in the Parts Tab 'Returned' column on the Portal. All returned parts will be returned to the engineers Van Stock, and not into the Gold Stock.



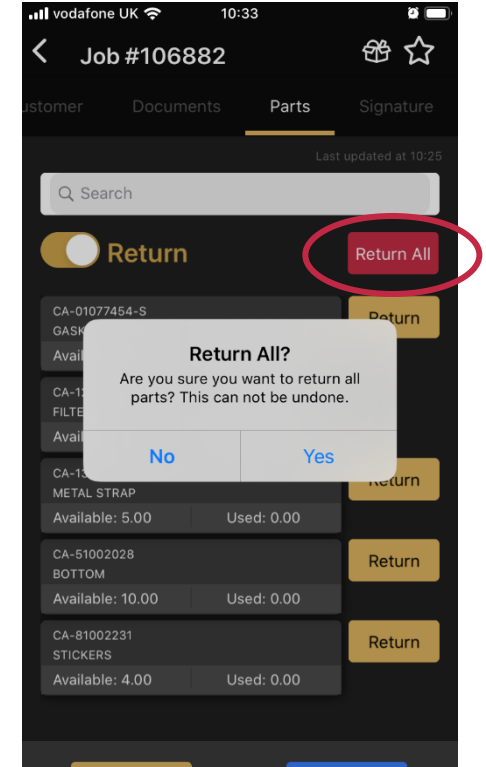
Make sure you are in the return screen by pressing the toggle button at the top of the page. Find the part you want to return and click the 'Return' button.



Choose the amount you want to return and then click 'Return'. The quantity and available numbers will change to reflect what has been returned.



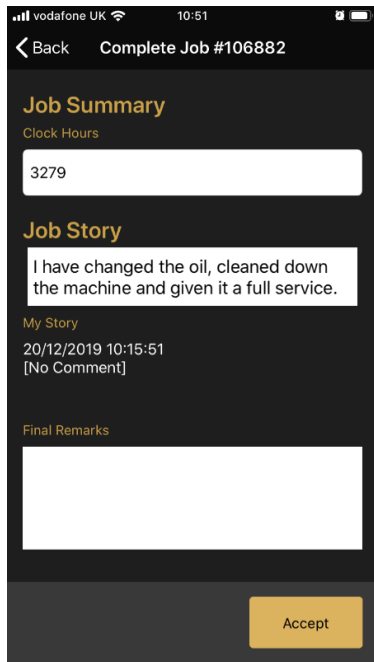
When the total quantity of the part is returned, the return button disappears. Once you return a part in the app you cannot undo it – this will have to be done in the Gold.



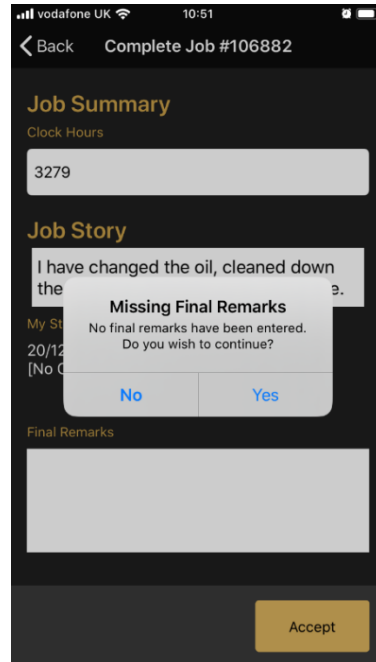
To return all parts at once, press the 'Return All' button. A message will appear asking if you're sure you want to return all. Remember, this action cannot be undone in the App.

## Parts Feature – Completing jobs with outstanding parts in the App

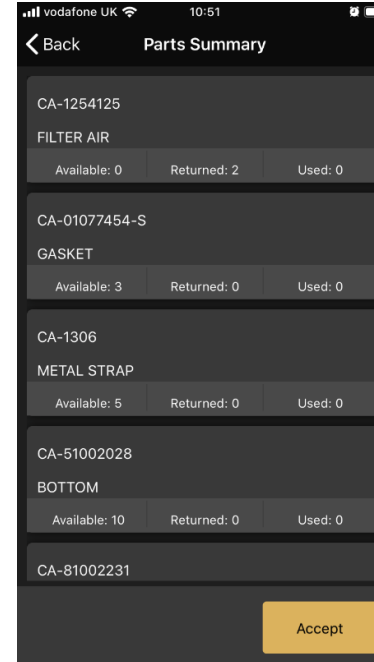
All parts must be marked as either used or returned on a job before it can be completed; this ensures all parts allocated to the job have been accounted for.



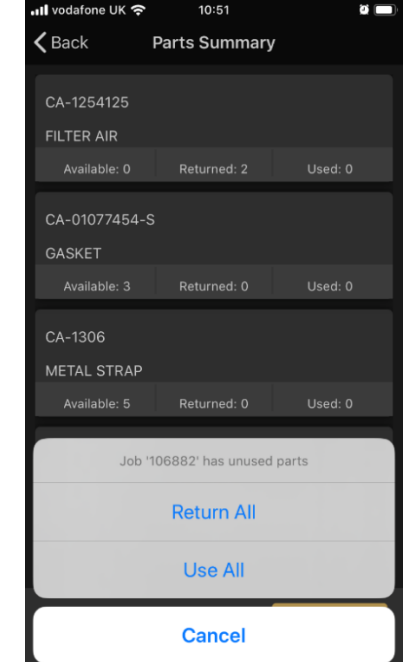
When the engineer is ready to complete the job, they should review the information entered and then press the 'Accept' button as per the current process.



If the clock hours or final remarks have not been entered, a message will appear asking if you wish to continue. Click the 'Accept' button if you are happy to continue.



This will open a 'Parts Summary' screen which shows a list of all the outstanding parts on the job and their status (available / used / returned). Press the accept button.



A pop up will appear prompting you to 'Return All' or 'Use All' of the outstanding parts. This action ensures all the parts allocated to that job have been accounted for.



### Did you know?

It is no longer mandatory to complete the Clock hours or final remarks. A notification will prompt you to confirm you want to leave them blank.

# Checklists

The Checklist feature allows you to add Checklists to jobs which the engineer can complete in the App. This is a Gold Service 2.0 feature.

## What are Checklists used for?

The Portal provides a blank Checklist template which allows you to create bespoke templates. Checklists can be used for multiple purposes such as:

- Risk Assessments
- Health and Safety checks
- Machine service checks
- General 'To Do' lists

## How do Checklists work?

In the Portal, you will see a feature called 'Checklists'. Using this feature, managers can create and store their Checklists and assign them to invoice types or individual jobs so that they will be visible in the App for the engineer to complete. Checklists can be configured to be mandatory or non-mandatory, and you can choose when the engineer should complete it:

- Start of job
- During job
- End of job

When the engineer updates the Checklist in the App, the information will be visible in the Portal.

## What does this document contain?

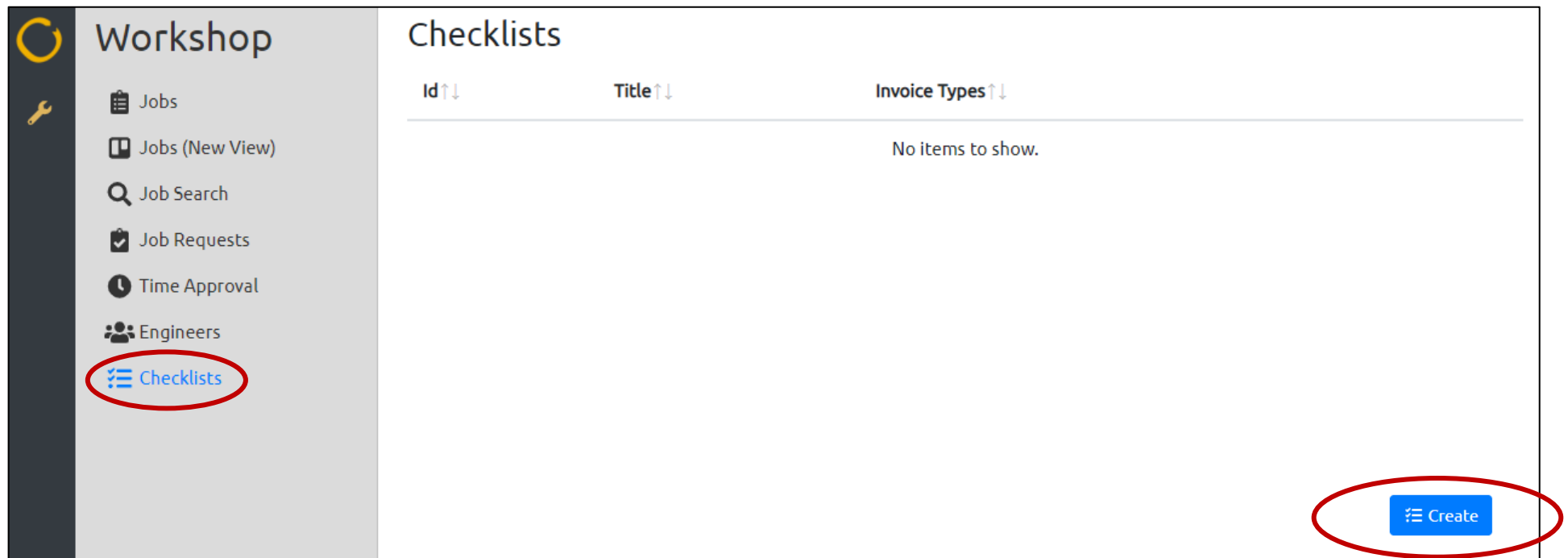
This document is intended to be used as a training manual for all users of the Checklist functionality. It contains screen shots and process instructions for all parts of the App and Portal. There is a separate, bitesize training manual for the App for the Engineers.

# Creating Checklists in the Portal

## The Checklist Library

In the Portal you will see a new page on the left-hand side of the screen called 'Checklists'. If you click on this, it will take you to the 'Checklist Library' screen. Here is where you can create and store your Checklists. The more you create, the more you will build up your library.

To create a Checklist, click on the 'Create Checklist' button found at the bottom right-hand side of the screen.



### Did you know?

The most recently created Checklist will automatically sit at the top of the list, but you can use the 'ascend / descend' to change this.



## Creating a Checklist

When you have pressed the 'Create Checklist' button on the Checklist library page, you will be taken to a new screen. From here, you can:

- **Name your Checklist:** You can create the title of your Checklist to reference what it is used for
- **Build up your Checklist items:** Add questions or tasks which your engineer can complete in the App
- **Configure your Checklist:** Make it mandatory / non-mandatory, and specify when the engineer should complete the Checklist on the job
- **Add Checklist to an invoice type:** Add the Checklist to one or more invoice types so it automatically appears against any job with that invoice type

The screenshot shows the 'Checklist -' configuration interface. On the left is a 'Workshop' sidebar with icons for Jobs, Jobs (New View), Job Search, Job Requests, Time Approval, Engineers, and Checklists. The main content area is titled 'Checklist -' and contains the text 'No current checklist items' and a '+ Add checklist item' button. On the right side, there are several configuration options: a 'Title' field with the placeholder 'Template title.', a 'Mandatory' checkbox, a 'Completion Stage' dropdown menu currently set to 'End of job', and an 'Invoice Types' search field. Below these is a table with columns 'Type' and 'Description', which currently shows 'No invoice types selected'. At the bottom left is a '< Back' button, and at the bottom right is a green 'Save' button.

## Configuring your Checklist

Once you have added your Checklist items, you can configure it via the right-hand side of the screen to ensure it is suitable for purpose.

- **Title:** To change this, click into the box and add your title. This title will be displayed in the Checklist library so you can identify it easily.
- **Mandatory or Non-Mandatory:** To make the Checklist completion mandatory, tick the tick box. The default will be set to non-mandatory.
- **Completion Stage:** You can choose whether the engineer completes the Checklist at the start of the job, during the job or at the end of the job. The default will be set to the end of the job. Use the drop-down box to choose your selection.
- **Invoice type:** You can add the Checklist to an invoice type, so it automatically appears on any job created using that invoice type. If you know the invoice type number, type it into the box and press enter. If you don't, click on the search icon to open the search box. Search for the invoice type and press 'OK'. You can add multiple invoice types to the Checklist if necessary and all invoice types assigned to this Checklist will be visible at the bottom right-hand side of the screen under the 'Type and Description' section.

### Configuration Area

The configuration area includes the following elements:

- Title:** A text input field containing "New checklist".
- Mandatory:** A checkbox that is currently unchecked.
- Completion Stage:** A dropdown menu with "End of job" selected.
- Invoice Types:** A text input field with a search icon (magnifying glass) circled in red.
- Type and Description:** A table header with columns for "Type" and "Description".
- Status:** A message at the bottom stating "No invoice types selected".

### Invoice Type Search Function

The Invoice Type Lookup dialog box contains the following elements:

- Search Input:** A text input field with the placeholder "Enter search text" and a "Clear" button to its right.
- Table Headers:** Three columns: "Type", "Description", and "Program Code", each with a small up/down arrow icon.
- Table Content:** The table is currently empty, displaying the message "No items to show." below the headers.
- Buttons:** "Cancel" and "OK" buttons are located at the bottom right of the dialog.

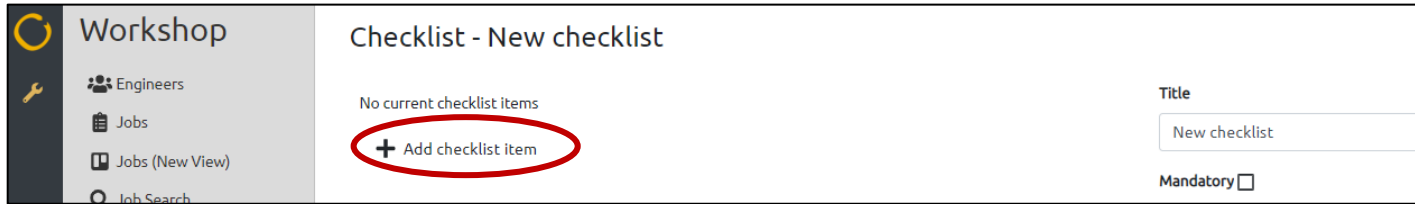


### Did you know?

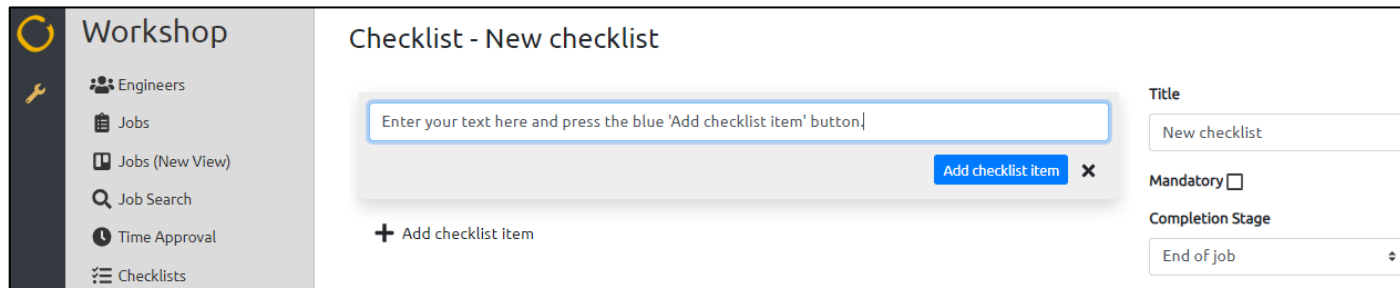
Even if Checklists are set for mandatory completion at the start of a job, engineers can choose to skip them until later to allow them to continue with the job. The Checklists will appear everytime the engineer starts to record time on that job, until it has been completed.

## Adding a new question or task to your Checklist

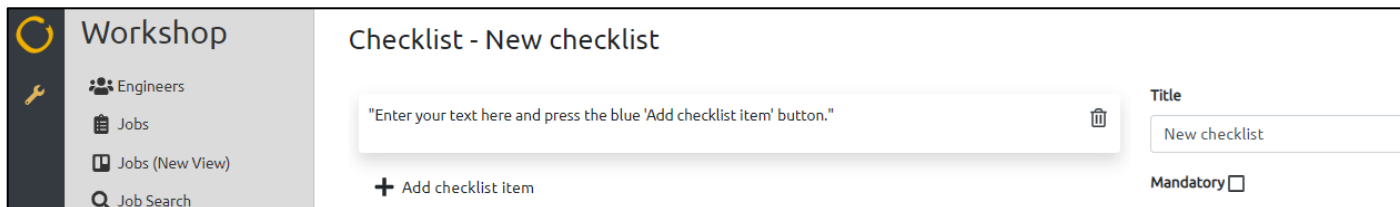
To add a new question or task to the Checklist, press '+Add Checklist item'.




A text box will appear allowing you to enter the question or task.



Once you have entered the text, press the blue 'Add Checklist item'. Your item has now been added to the Checklist.



### Did you know?

You can edit the Checklist item by double clicking on it. This will reopen the text box and allow you to amend it. Ensure you press the save button to save these amendments. You can also delete the item by pressing the  icon next to it.

## Editing, duplicating and deleting Checklists

Once you have created your Checklist, you will see that it now exists within the 'Checklist Library' part of the Portal. You have the option to edit, duplicate or delete the Checklist from this page. Next to each Checklist, you will notice 3 symbols. One to edit, one to duplicate and one to delete.

Id	Title	Invoice Types	
2	Risk Assessment	No invoices	[edit] [duplicate] [delete]

### Editing your Checklist

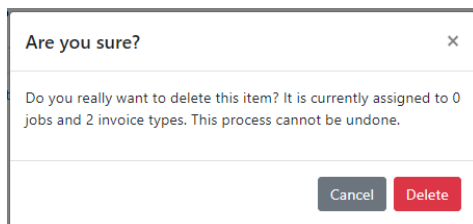
To edit your Checklist, click on the edit symbol, or the Checklist title. This will open the Checklist and allow you to make the necessary amendments. Once you are happy with the amendments, remember to click the 'save' button at the bottom right hand corner of the screen. If you do not do this, your changes will not be saved.

### Duplicating your Checklist

To duplicate your Checklist, click on the duplicate symbol. This will open a duplicate version of that Checklist. You will notice that the title of the Checklist will be the same but will have 'copy' at the end of it. You can only save this duplicated Checklist if something has been changed on it – for example: the title, or a question or task. Remember to click the 'save' button at the bottom right hand corner of the screen to save the Checklist. If you do not do this, your changes will not be saved.

### Deleting your Checklist

To delete your Checklist, click on the delete symbol. A pop-up box will appear asking if you're sure you want to delete it. It will tell you how many jobs and invoice types the Checklist is assigned to. Deleting it will only remove it from jobs and invoice types going forward and not retrospectively.



# Overview of the Checklists in Gold

## Assigning a Checklist to a job in Gold

If you are creating a job with an invoice type that does not have Checklists assigned to it, then you can assign Checklists to the job in the 'Instructions' tab. You will see a new item called 'Chklist'. Click on this to assign a Checklist to the job.

```

Job: 106597  INV      Inv Type:21      Workshop Invoicing      Parts:          0.00
Cust:  1220  Abacus Building Company      28/02/17      Labour:         0.00
|Head|Cont|Parts|Lab|FlatR|Story|Inv|Instru|Opt|Prt|Audit|Docs|OIP|Txt|Events|
No Instructions

Use Shortcuts or arrow keys to view
F2      | F3 Amend | F4      | F5 Chklist | F6 JobCard | F7      | F8      |
    
```



**Did you know?**

Checklists can be accessed via both Workshop Entry Jobs and Jobs created via Scheduler.

Once you have selected the Checklist option, select 'insert'. In the 'Template ID' section, you can enter the template ID and press enter. If you don't know the Template ID, put a question mark in the box and press enter. This will bring up all the Checklist templates that are available.

```

Job: 106900 INV  Inv Type:22  Flat Rates F/P/L  Parts: 0.00
Cust: 1220 Abacus Building Company 31/01/19 Labour: 0.00
-----
Id          Title
-----
Checklists allocated to Job

-----
Checklists Inserting line 1 of 1
-----
Template Id  ?
-----
Use Arrow Keys to Select then <Enter>
F2 OK      F3      F4      F5      F6      F7      F8
  
```



```

Job: 106900 INV  Inv Type:22  Flat Rates F/P/L  Parts: 0.00
Cust: 1220 Abacus Building Company 31/01/19 Labour: 0.00
-----
Id          Title
-----
Checklists allocated to Job
-----
----- Templates -----
Id          Title
-----
1          Risk Assessment
3          New checklist 2
4          A list of stuff
-----
Use Arrow Keys to Select Item Required
F2      F3 Find  F4      F5      F6      F7      F8
  
```

Select the Checklist you want to add to the job, and press enter. If you want to add more than one Checklist, follow the process again. You will see that your Checklist is now added to the job.

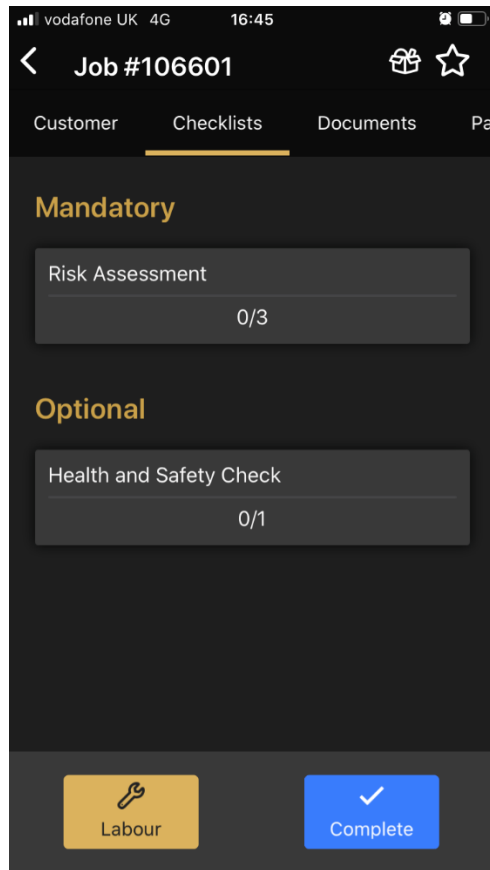
```

Job: 106900 INV  Inv Type:22  Flat Rates F/P/L  Parts: 0.00
Cust: 1220 Abacus Building Company 31/01/19 Labour: 0.00
-----
Id          Title
-----
1          Risk Assessment
-----
Use Arrow Keys to Select then <Enter>
F2 Insert  F3      F4 Delete  F5      F6      F7      F8
  
```

# Overview of the Checklists in the App

## The Checklist Tab

When engineers now open the job in the App, they will see a new tab called 'Checklists'. This is where the engineer can see all Checklists that have been assigned to that job. It will be split into 2 sections: Mandatory and Optional



### **Mandatory**

This section will hold all Checklists which have been configured as mandatory completion within the Portal.



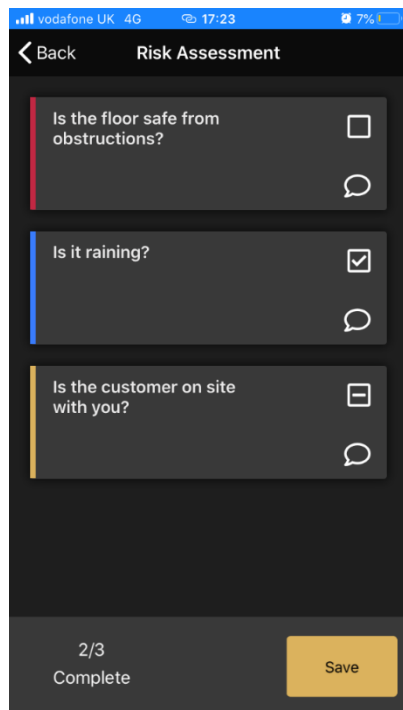
### **Optional**

This section will hold all Checklists which have been configured as non-mandatory completion within the Portal.

## How to show the Checklist item has been actioned

When engineers click on the Checklist, it will open it in a new screen and display all the questions / tasks within it. Next to each item you will see a 'tick box' icon, and a 'speech bubble' icon. This page focusses on the 'tick box' icon.

The engineer can use the tick box to show that an action has been taken against that specific Checklist item. To use it, press anywhere on the Checklist item. Pressing more than once will change the status of the item:



### No action taken:

If the engineer has not pressed on the Checklist item, the tick box will be empty, and the colour bar will be red. This indicates the engineer has not completed that item yet.

### Press once:

If the engineer presses on the Checklist item once, a tick will appear in the tick box, and the colour bar will turn blue. This indicates that the engineer has completed this item.

### Press twice:

If the engineer presses on the Checklist item twice, a line will appear in the tick box, and the colour bar will turn gold. This indicates that this item is 'not applicable'.

The numbers at the bottom of the screen indicate the number of Checklist items that have been actioned.



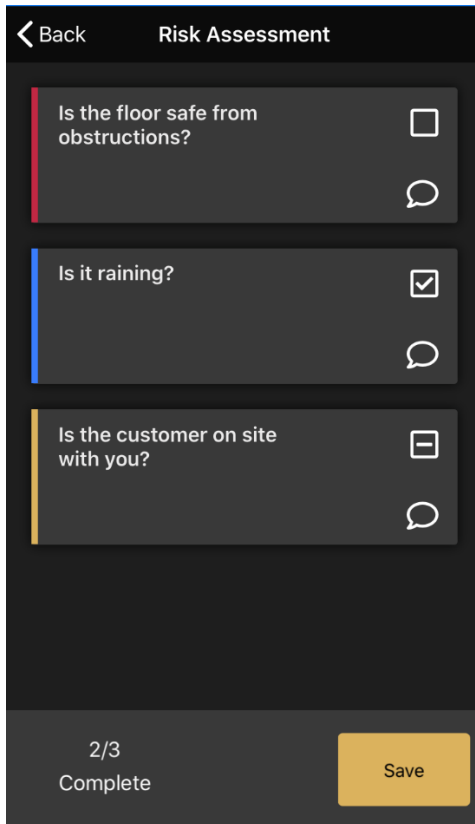
### Did you know?

You can press the Checklist item for a third time to reset it to its original state of 'no action taken'.

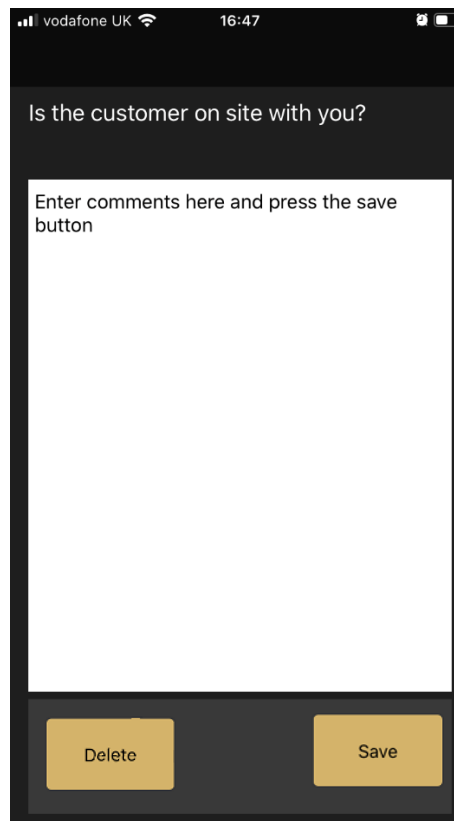


## How to add a comment to a Checklist item

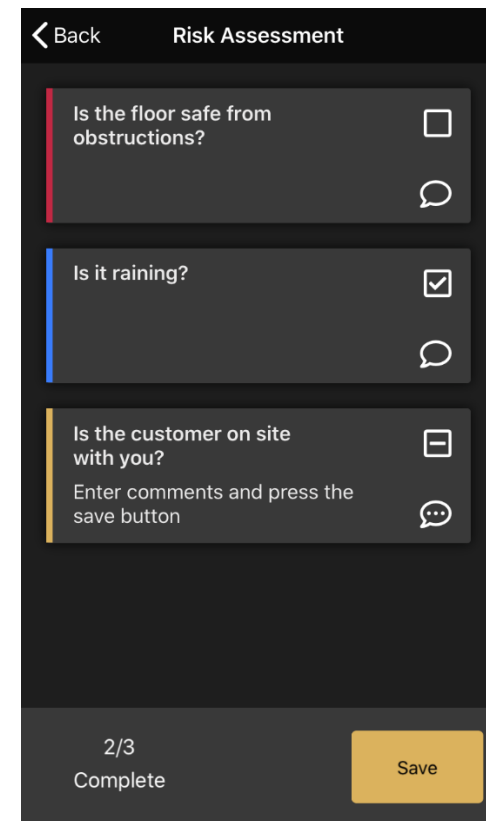
Engineers can add comments to Checklist items which will be sent back to the Portal as soon as they are saved.



To add a comment, press the speech bubble icon next to the relevant Checklist item. This will open a new page



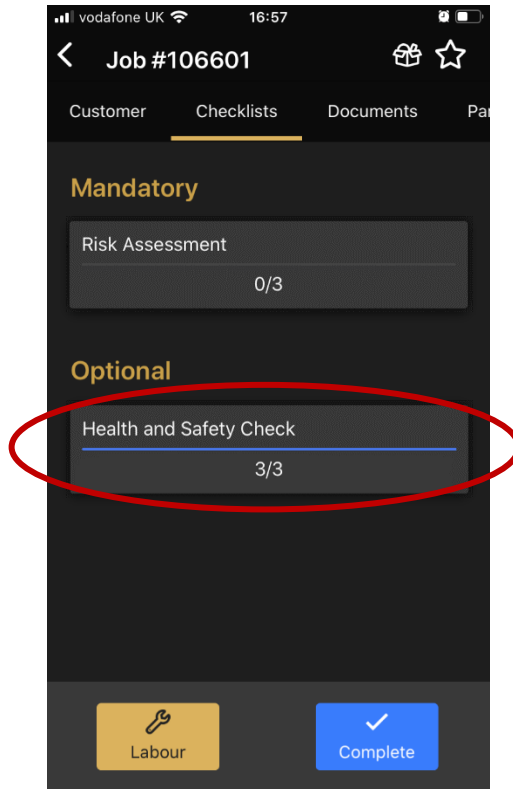
When the comments have been entered, press the 'save' button to save the text, or the 'delete' button to remove the text



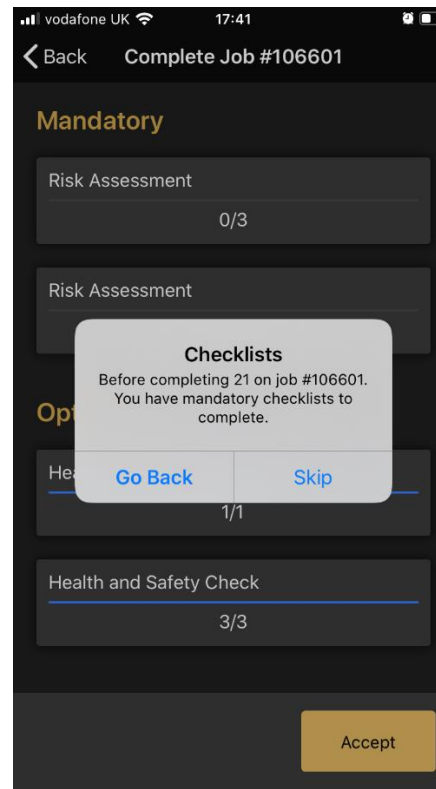
You will see that the speech bubble icon now has 3 dots through the middle and the comments entered are shown

## Completing Checklists on the App

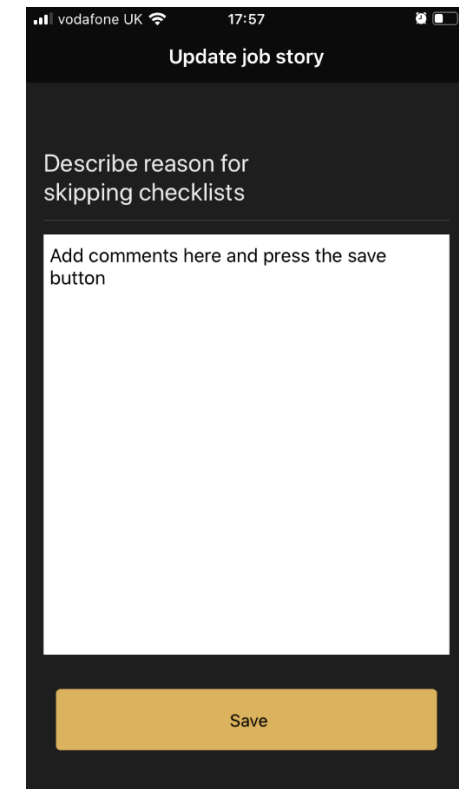
When an engineer has completed the Checklist on the App, the status of the Checklist will change to show it has been completed.



When the engineer has completed a Checklist, it will show on the Checklist tab with a solid line through it, and the 'total' will reflect that all items have been done. The engineer can go into completed Checklists and amend them if necessary



If the engineer tries to complete the job with mandatory Checklists outstanding, they will be prompted to complete the items. If they press the 'accept' button from this page, a notification asks if they want to 'go back' to the Checklists, or 'skip' to complete the job



If the engineer chooses to 'skip' the Checklist, they will be asked to add a reason for the decision. Once they enter their comments and press the 'save' button, they will be taken through the usual job completion flow

# Overview of completed Checklists

## Reviewing the completed Checklists in the Portal

Managers can review the Checklist information from within the job in the Portal. You will see a new Checklist tab, and within it you can see all the Checklists assigned to that job. This screen will tell you:

- If the Checklist is mandatory or non-mandatory
- Whether it should be completed at the start of the job, during the job or at the end of the job
- When the Checklist was last updated by the engineer and the status of its completion

The screenshot shows the 'Workshop' interface for Job 106601. The 'Checklists' tab is active, displaying a table with the following data:

Title	Mandatory	Completion stage	Last Updated	Progress
Health and Safety Check		End of job	30/06/2020 05:41pm	3/3
Risk Assessment	✓	During job	Never	



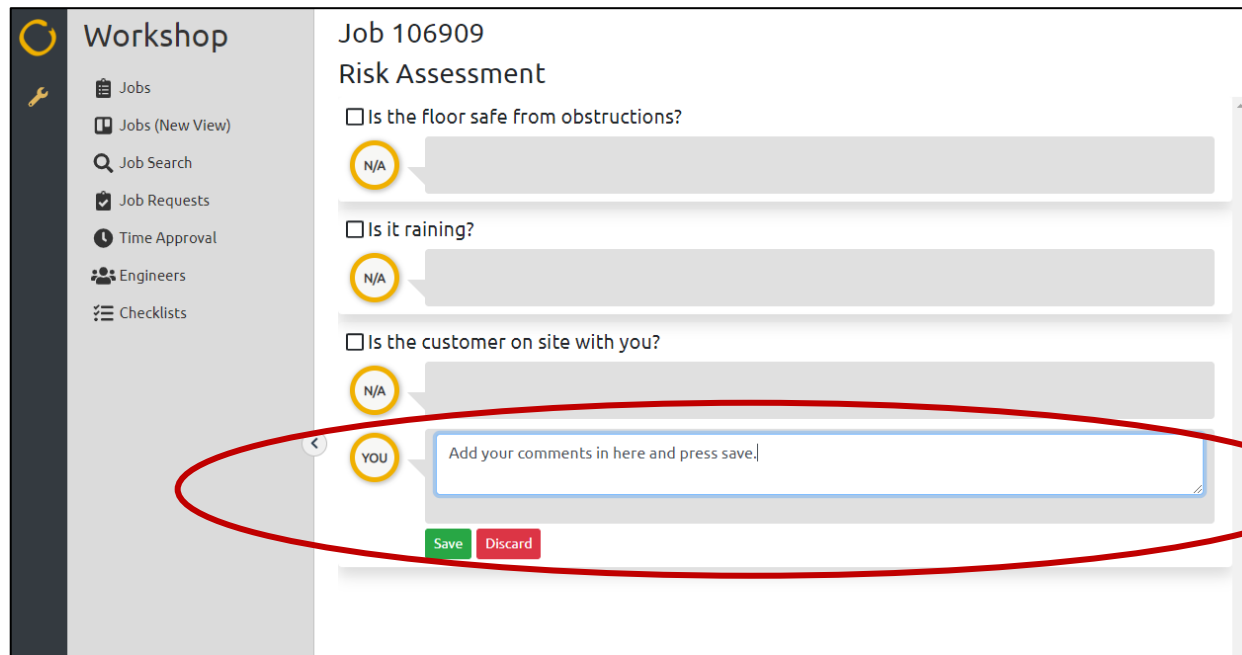
### Did you know?

You can click on the title of the Checklist to open a 'quick view'. This view will show you all the comments made by the engineer without you having to edit the Checklist to view this information.

## Editing completed Checklists within the Portal

Managers can edit the Checklist information that has been submitted by the engineer. In the job on the Portal, go to the Checklist tab. Press the 'edit' button located to the right hand side of the Checklist you want to amend. This will open the Checklist in full detail. Each item will display the engineers number to indicate who has completed it.

To edit an item, double click into the grey box and amend the item as necessary. Save these individual changes by pressing 'save', or discard them by pressing 'discard'. If you save the changes, they will show as a new line under the original comment. To save all changes, press the green 'save' button at the bottom right-hand corner of the screen.



### Did you know?

If you amend an engineers comment, your changes will show as a new line underneath the original comment. Your 'ID number' will be visible next to this comment to show who has made the amendment.