

Gold Service

Managers Multi Engineer Instruction Manual

Version 0.1

7th October 2020

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Overview

What is Multi Engineer?

The Multi Engineer feature allows more than one engineer to work on a job at the same time, and each engineer can individually submit the following information to the Portal:

- Travel Time
- Labour Time
- Mileage
- Serial Number Changes
- Parts Notes
- Job Story
- Signatures

What has changed?

To allow more than one engineer to work on a job at the same time, the job needs to remain open in the App. If an engineer marks the job as completed, it restricts other engineers from being able to work on it.

To solve this problem, we have removed the ability for engineers to mark jobs as completed in the App. Instead, jobs must be marked as completed by the Managers in the Portal. You must mark the jobs as completed in the Portal, and not in Gold. If jobs are marked as completed in Gold and then the status of the job is changed, the job could show up in an incorrect Portal column.

Engineers will not notice much change to the completion process in the App - they will still press the complete button when they have finished their tasks, but this will complete their work and not the job.

What does this document contain?

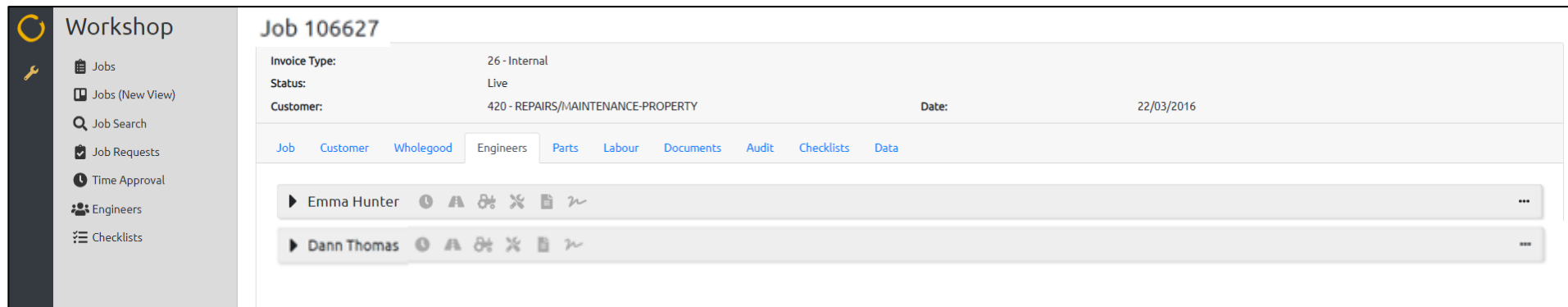
This document contains screenshots of the Portal and the App for the Multi Engineer feature. It is intended to be used as a training manual for all Portal users and the expectation is that they will inform their engineers of these changes in the App.

Overview of the new Engineers Tab and Data Tab

In the Portal, when you open a job, you will see 2 new tabs: The 'Engineers' Tab and the 'Data' Tab.

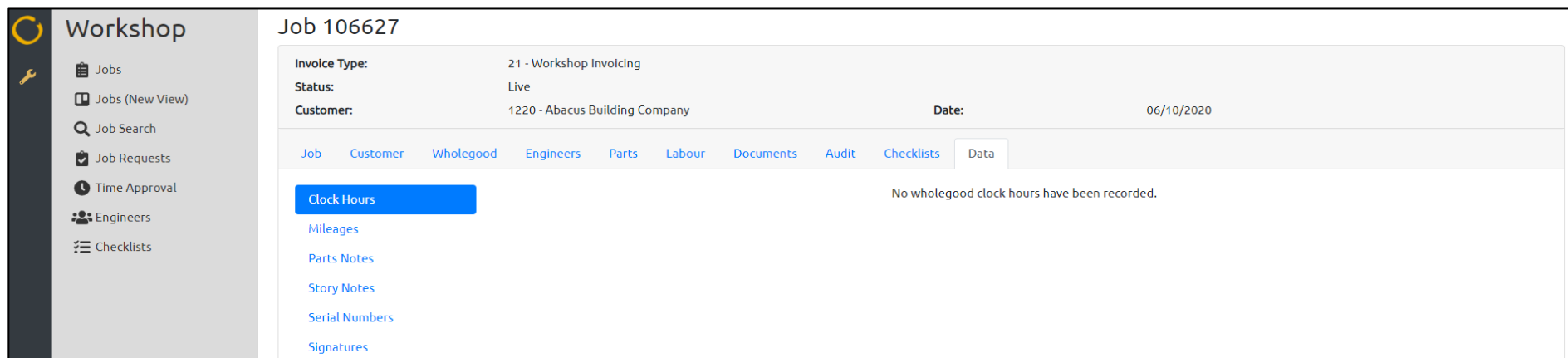
Engineers Tab

The Engineers tab shows a list of the engineers who have been assigned to the job and the data they have submitted. It will also show engineers who have not been assigned to the job, but have searched for it, and submitted data against it.



Data Tab

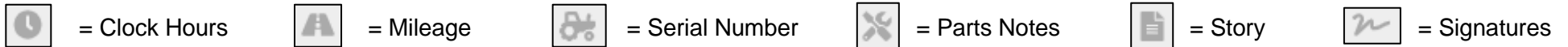
The Data Tab shows a list of all the data that has been submitted to the job by the engineers.



Engineers Tab

The Engineers tab shows a list of all engineers working on the job. This includes engineers who have been assigned to the job via Gold or Scheduler, and those who have searched for, and worked on the job without being assigned to it. If you use Gold (classic or windows) to create workshop jobs, you will only be able to assign one engineer to the job. If you use scheduler, you can assign multiple engineers to the job. If an engineer is not assigned to a job, they can still search for it and work on it.

Next to each engineer, you will see 6 icons that represent:



You can hover your mouse over the icons to see what they represent.

When an engineer has submitted data from the App to the Portal, the corresponding icon will turn green. If an engineer has marked their work as completed in the App, you will see the date and time of when they pressed the complete button to the right of their name.

The screenshot displays the 'Workshop' interface for 'Job 106627'. The sidebar on the left contains navigation links: Jobs, Jobs (New View), Job Search, Job Requests, Time Approval, Engineers, and Checklists. The main content area shows job details: Invoice Type (21 - Workshop Invoicing), Status (Live), Customer (1220 - Abacus Building Company), and Date (06/10/2020). Below this is a tabbed interface with 'Engineers' selected. A list of engineers is shown: Dann Thomas and Emma Hunter. Each engineer's name is followed by six icons representing different data types. Emma Hunter's icons are green, indicating data submission. To the right of Emma Hunter's name, a green checkmark and the date/time '07/10/2020 10:52am' are displayed, circled in red. A 'Back' button is at the bottom left, and a 'Complete Job' button is at the bottom right.



Did you know?

If an engineer is not assigned to the job, and they search for it and add data to it without logging time, their name will not show in the Portal. Instead they will be listed as 'unknown'. If this happens, the engineer can go back into the job and log time so that they are associated with it. This will ensure their name appears against their data.

View data submitted by engineers

To see the data the engineer has submitted in more detail, click on the triangle to the left of their name. This will expand their box and show their data.

The screenshot displays the 'Job 106627' interface. On the left is a 'Workshop' sidebar with navigation options: Jobs, Jobs (New View), Job Search, Job Requests, Time Approval, Engineers, and Checklists. The main content area shows job details: Invoice Type (21 - Workshop Invoicing), Status (Live), Customer (1220 - Abacus Building Company), and Date (06/10/2020). Below this is a tabbed interface with 'Engineers' selected. Two engineer entries are listed: 'Dann Thomas' and 'Emma Hunter'. The 'Emma Hunter' entry is expanded, showing a red circle around a downward-pointing triangle next to her name. The expanded view includes: Clock Hours (-), Mileage (89), Serial Number (1234567A), Parts Notes (Engineer 2's parts notes will show here), and Story (No story). A signature section shows a signature by David Rose dated 06/10/2020 11:03am. At the bottom, there are 'Back' and 'Complete Job' buttons.

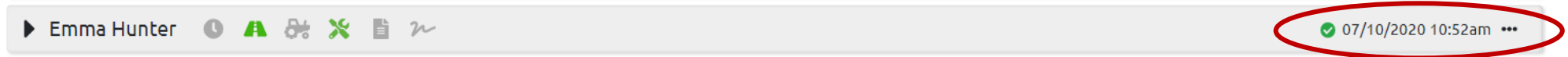


Did you know?

If an engineer submits a new Serial Number, you can approve the change in 3 different places on the Portal: In the 'Engineers' Tab, in the 'Wholegood' Tab and in the 'Data' Tab. Each area will update the job in Gold when you approve it. Instructions on this are in this manual.

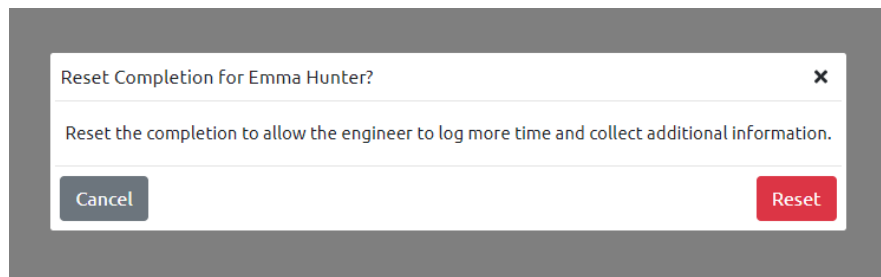
Reset a 'Work Completion' for an engineer

If an engineer has marked their work as completed in the App, you will see the date and time of when they pressed the complete button to the right of their name.



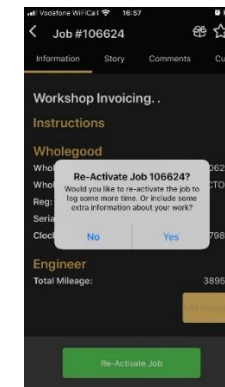
If an engineer has marked their work as completed, they can no longer log time or submit data against that job. There are 2 ways you can reset the job so that the engineer can continue to work on it: From the App, and from the Portal.

From the Portal:



To reset the job from the Portal, go to the Engineer Tab and click on the 3 dots next to the engineer's name. Press 'Reset Job'. A notification will appear asking if you want to 're-open' the job for that engineer. Click 'Reset', and the job will be re-opened in the App for that engineer. They will be able log data on it again. Click 'Cancel' to keep the job closed for that engineer.

From the App:



When an engineer opens a job, they have marked as completed, they will see a 'Reactivate Job' button at the bottom of the screen. When they press this button, a notification will appear asking them if they want to reactivate the job. If they press 'Yes', the job will open up and they can continue to work on it. If they press 'No', the job will remain closed for them.



Did you know?

If an engineer reactivates the job in the App, the date and time stamp of completion will be removed from their name in the Portal.

Data Tab – Overview

In the job you will see a new tab called 'Data'. Within this tab, you will see sub-headings for:

- Clock Hours
- Mileage
- Parts Notes
- Story Notes
- Serial Numbers
- Signatures

When engineers submit information against the job, you will see a blue circle next to the appropriate sub-heading to indicate how many items have been submitted. The data will be shown in rows with the following details:

- Engineer Name
- Data submitted (corresponding to the sub-heading you have selected)
- Date and Time the data was recorded
- Date and Time the data was uploaded to the Portal.



Did you know?

On each sub-heading, you can sort the order of the columns in 'Ascending' or 'Descending' order by using the 2 arrows next to the column title. Click the 'Up' arrow to sort the data in 'Ascending' order and click the 'Down' arrow to sort the data in 'Descending' order.

Data Tab – Clock Hours

Any clock hours submitted by the engineers will be visible in the ‘Clock Hours’ section of the Data tab. This is a read only view. You can use the data submitted here to build up the job confirmation when you start the job completion process.

The data will be shown in rows with the following detail:

- Engineer Name
- The Clock Hours submitted
- Date and Time the data was recorded
- Date and Time the data was uploaded to the Portal

Engineer	Wholegood Clock Hours	Recorded On	Uploaded On
Emma Hunter	339839 Hours	06/10/2020 11:48am	06/10/2020 11:48am
Dann Thomas	339729 Hours	06/10/2020 11:00am	06/10/2020 11:00am



Did you know?

During the job completion process, you can choose which Clock Hours to display on the Job Confirmation. The data will default to the highest Clock Hours submitted unless you choose to change it.

Data Tab – Mileage

All mileage submitted by the engineers will be visible in the ‘Mileages’ section of the Data tab. This is a read only view. You can use the data submitted here to build up the job confirmation when you start the job completion process.

The data will be shown in rows with the following detail:

- Engineer Name
- The Mileage submitted
- Date and Time the data was recorded
- Date and Time the data was uploaded to the Portal

Engineers can add mileage to a job, regardless of whether the company uses the Travel button or not.

Job	Customer	Wholegood	Engineers	Parts	Labour	Documents	Audit	Checklists	Data																														
<p>Job 106627</p> <p>Invoice Type: 21 - Workshop Invoicing Status: Live Customer: 1220 - Abacus Building Company Date: 06/10/2020</p>																																							
<table border="1"> <thead> <tr> <th>Clock Hours</th> <th>Engineer</th> <th>Mileage</th> <th>Recorded On</th> <th>Uploaded On</th> </tr> </thead> <tbody> <tr> <td>Mileages</td> <td>Emma Hunter</td> <td>79 Miles</td> <td>06/10/2020 11:02am</td> <td>06/10/2020 11:02am</td> </tr> <tr> <td>Parts Notes</td> <td>Dann Thomas</td> <td>73 Miles</td> <td>06/10/2020 11:00am</td> <td>06/10/2020 11:00am</td> </tr> <tr> <td>Story Notes</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Serial Numbers</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Signatures</td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>										Clock Hours	Engineer	Mileage	Recorded On	Uploaded On	Mileages	Emma Hunter	79 Miles	06/10/2020 11:02am	06/10/2020 11:02am	Parts Notes	Dann Thomas	73 Miles	06/10/2020 11:00am	06/10/2020 11:00am	Story Notes					Serial Numbers					Signatures				
Clock Hours	Engineer	Mileage	Recorded On	Uploaded On																																			
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Story Notes																																							
Serial Numbers																																							
Signatures																																							



Did you know?

During the job completion process, you can choose which Mileage to display on the Job Confirmation. The mileage will automatically populate with the sum total of all the Mileage submitted to the job by each engineer who has worked on it unless you choose to change it.

Data Tab – Parts Notes

All Parts Notes submitted by the engineers will be visible in the 'Parts Notes' section of the Data tab. This is a read only view. You can use the data submitted here to build up the job confirmation when you start the job completion process.

The data will be shown in rows with the following detail:

- Engineer Name
- The Parts Notes submitted
- Date and Time the data was recorded
- Date and Time the data was uploaded to the Portal

Workshop Job 106627

Invoice Type: 21 - Workshop Invoicing
 Status: Live
 Customer: 1220 - Abacus Building Company Date: 06/10/2020

Job Customer Wholegood 1 Engineers Parts Labour Documents Audit Checklists Data

	Clock Hours	Mileages	Parts Notes	Story Notes	Serial Numbers	Signatures
	2	2	2	2	2	5

Engineer	Parts Note	Recorded On	Uploaded On
Dann Thomas	Engineer 1's parts notes will show here If Engineer 1 adds more parts notes, they will show here	06/10/2020 12:01pm	06/10/2020 12:01pm
Emma Hunter	Engineer 2's parts notes will show here	06/10/2020 11:09am	06/10/2020 11:09am



Did you know?

During the job completion process, you can choose which Parts Notes to display on the Job Confirmation.

Data Tab – Story Notes

All Story Notes submitted by the engineers will be visible in the 'Story Notes' section of the Data tab. This is a read only view. You can use the data submitted here to build up the job confirmation when you start the job completion process.

The data will be shown in rows with the following detail:

- Engineer Name
- Story Notes submitted
- Date and Time the data was recorded
- Date and Time the data was uploaded to the Portal

Workshop

- Jobs
- Jobs (New View)
- Job Search
- Job Requests
- Time Approval
- Engineers
- Checklists

Job 106627

Invoice Type: 21 - Workshop Invoicing
 Status: Live
 Customer: 1220 - Abacus Building Company Date: 06/10/2020

Job Customer Wholegood 1 **Engineers** Parts Labour Documents Audit Checklists **Data**

Clock Hours	2	Engineer ↑↓	Story Note	Recorded On ↑↓	Uploaded On ↑↓
Mileages	2	Dann Thomas	# Engineer 1's story will show here If engineer 1 adds more detail to the story, then it will show here	06/10/2020 11:52am	06/10/2020 11:52am
Parts Notes	2	Emma Hunter	# Engineer 2's story will show here	06/10/2020 11:48am	06/10/2020 11:48am
Story Notes	2				
Serial Numbers	2				
Signatures	5				



Did you know?

During the job completion process, you can choose which Story Notes to display on the Job Confirmation.

Data Tab – Serial Numbers

Any Serial Number changes that are submitted by the engineers will be visible in the ‘Serial Numbers’ section of the Data tab. You can use the data submitted here to build up the job confirmation when you start the job completion process. The data will be shown in rows with the following detail:

- Engineer Name
- The Serial Numbers submitted
- Date and Time the data was recorded
- Date and Time the data was uploaded to the Portal

The screenshot shows the 'Workshop' interface for Job 106627. The 'Data' tab is active, displaying a table of serial numbers. The table has columns for 'Engineer', 'Serial Number', 'Recorded On', and 'Uploaded On'. Two rows are visible: one for 'Dann Thomas' with serial number '1234567A' and another for 'Emma Hunter' with serial number '1234567A'. A tooltip 'Approve Serial Number' is shown over the '1234567A' serial number.

Engineer	Serial Number	Recorded On	Uploaded On
Dann Thomas	1234567A	06/10/2020 11:52am	06/10/2020 11:52am
Emma Hunter	1234567A	06/10/2020 11:02am	06/10/2020 11:02am



Did you know?

If you click on a serial number, an ‘Approve Serial Number’ button will appear allowing you to approve the change submitted by the Engineer. The ‘Approving Serial Numbers’ section of this manual will provide instructions on how to do this.

Data Tab – Signatures

Any Signatures that are captured by the engineers will be visible in the ‘Signatures’ section of the Data tab. All signatures will be displayed on the same screen and will not be categorised by which engineers captured them.

Each signature box will show the following details:

- Customers signature
- Customers name
- Name of the engineer who submitted the signature
- Date and time the signature was captured

You can use the data submitted here to build up the job confirmation when you start the job completion process.

The screenshot shows the 'Workshop' interface for Job 106627. The 'Data' tab is selected, displaying a grid of signatures. The interface includes a sidebar with navigation options like 'Jobs', 'Job Search', and 'Engineers'. The main content area shows the following details for Job 106627:

- Invoice Type:** 21 - Workshop Invoicing
- Status:** Live
- Customer:** 1220 - Abacus Building Company
- Date:** 06/10/2020

The 'Data' tab shows the following signatures:

Engineer Name	Customer Name	Date and Time
Sam Jones	Dann Thomas	06/10/2020 12:02pm
John Parsons	Dann Thomas	06/10/2020 12:02pm
Ross Smith	Dann Thomas	06/10/2020 11:53am
William Reynolds	Emma Hunter	06/10/2020 11:49am
David Rose	Emma Hunter	06/10/2020 11:03am



Did you know?

There is no limit to the number of signatures each engineer can collect on the App.

Approving serial number changes

If an engineer submits a Serial Number change, it will show in 3 different tabs on the job in the Portal:

The Wholegood Tab:

The screenshot shows the 'Wholegood' tab selected in the job portal. The main content area displays the following information:

- Invoice Type:** 21 - Workshop Invoicing
- Status:** Live
- Customer:** 1220 - Abacus Building Company
- Date:** 06/10/2020

Below this, there are tabs for Job, Customer, Wholegood (1), Engineers, Parts, Labour, Documents, Audit, Checklists, and Data. The 'Wholegood' tab is active, showing:

- Wholegood Number:** 15000284
- Serial Number:** 123456789B (with a blue 'Change' button and a warning icon)
- Make:** MAIN FRANCHISE
- Model:** EHRAC

The Engineers Tab:

The screenshot shows the 'Engineers' tab selected in the job portal. The main content area displays the following information:

- Invoice Type:** 21 - Workshop Invoicing
- Status:** Live
- Customer:** 1220 - Abacus Building Company
- Date:** 06/10/2020

Below this, there are tabs for Job, Customer, Wholegood (1), Engineers (1), Parts, Labour, Documents, Audit, Checklists, and Data. The 'Engineers' tab is active, showing a list of engineers:

- Dann Thomas** (with icons for edit, delete, and other actions)
- Emma Hunter** (with a dropdown arrow)

Below the list, the following information is displayed:

- Clock Hours:** 339839
- Mileage:** 89579
- Serial Number:** 1234567A

The Data Tab:

The screenshot shows the 'Data' tab selected in the job portal. The main content area displays the following information:

- Invoice Type:** 21 - Workshop Invoicing
- Status:** Live
- Customer:** 1220 - Abacus Building Company
- Date:** 06/10/2020

Below this, there are tabs for Job, Customer, Wholegood (1), Engineers (1), Parts, Labour, Documents, Audit, Checklists, and Data (1). The 'Data' tab is active, showing a table with the following columns and data:

Clock Hours	Engineer	Serial Number	Recorded On	Uploaded On
Mileages	Dann Thomas	1234567A	06/10/2020 11:52am	06/10/2020 11:52am

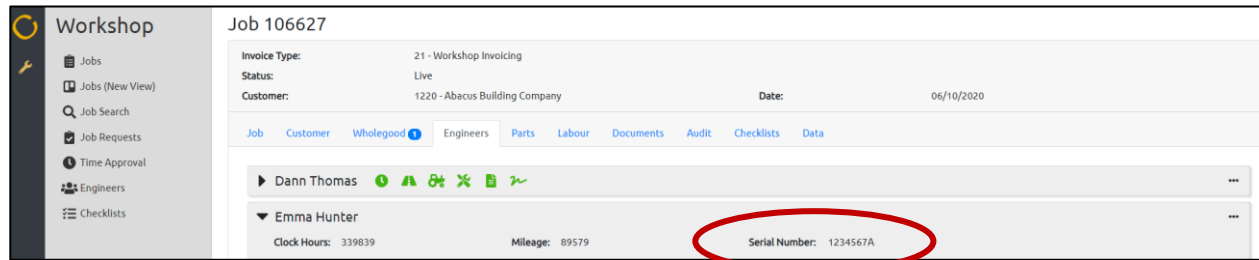


Did you know?

If you approve a Serial Number change in either the Engineers Tab, the Wholegood Tab or the Data Tab, the Serial Number will be updated in all the other Tabs, and the change will be updated in the job in Gold.

Approve a Serial Number change – Engineers Tab

Expand the engineers details to see the Serial Number they have submitted. To approve this change, click on the Serial Number.



If the number they have submitted matches a wholegood associated with that customer, a box will appear on the screen to confirm the Serial Number has been found. Click the 'Accept' button to approve the change, or the 'Cancel' button to go back to the main screen.



If the engineer submits a serial number that does not match a wholegood associated with that customer, a box will appear giving you the option to choose one from a drop-down list. Once you have selected a Serial Number, you will be able to approve it.



Did you know?

If you approve a Serial Number change in the Engineers Tab, the Serial Number will be updated in the Wholegood Tab and the Data Tab, and the change will also be updated in the Job in Gold.

Approve a Serial Number change – Data Tab

Click on the ‘Serial Number’ sub heading in the to see the Serial Numbers submitted by the engineers. To approve a change, click on the Serial Number.

Job	Customer	Wholegood	Engineer	Serial Number	Recorded On	Uploaded On
			Dann Thomas	1234567A	06/10/2020 11:52am	06/10/2020 11:52am
			Emma Hunter	1234567A	06/10/2020 11:02am	06/10/2020 11:02am

If the number they have submitted matches a wholegood associated with that customer, a box will appear on the screen to confirm the Serial Number has been found. Click the ‘Accept’ button to approve the change, or the ‘Cancel’ button to go back to the main screen.



Change Serial Number

Wholegood Number	15000284
Serial Number	123456789B
Make	MAIN FRANCHISE
Model	EHTRAC

Would you like to assign this wholegood to the job?

If the engineer submits a serial number that does not match a wholegood associated with that customer, a box will appear giving you the option to choose one from a drop-down list. Once you have selected a Serial Number, you will be able to approve it.



Change Serial Number

No wholegood has been found matching the serial number.

Please select an alternate wholegood:

Please select an alternate wholegood



Did you know?

If you approve a Serial Number change in the Data Tab, the Serial Number will be updated in the Wholegood Tab and the Engineers Tab, and the change will also be updated in the Job in Gold.

Approve a Serial Number change – Wholegood Tab

To see the Serial Number changes submitted by the engineers in the Wholegood Tab, click on the 'Change' button. A box will appear showing you all the Serial Number changes that have been submitted by each engineer. Select the Serial Number you want to approve.

Workshop Job 106627

Invoice Type: 21 - Workshop Invoicing
 Status: Live
 Customer: 1220 - Abacus Building Company Date: 06/10/2020

Job Customer Wholegood **Engineers** Parts Labour Documents Audit Checklists Data

Wholegood Number: 15000284 Serial Number: 123456789B **Change** ▲
 Make: MAIN FRANCHISE Model: EHTRAC

Change Serial Number

Please select from the captured serial numbers:

Engineer	Serial	Date
Dann Thomas	1234567A	06/10/2020 11:52am
Emma Hunter	1234567A	06/10/2020 11:02am

Cancel Accept

If the number they have submitted matches a wholegood associated with that customer, a box will appear on the screen to confirm the Serial Number has been found. Click the 'Accept' button to approve the change, or the 'Cancel' button to go back to the main screen.

Change Serial Number

Wholegood Number: 15000284
 Serial Number: 123456789B
 Make: MAIN FRANCHISE
 Model: EHTRAC

Would you like to assign this wholegood to the job?

Cancel Accept

If the engineer submits a serial number that does not match a wholegood associated with that customer, a box will appear giving you the option to choose one from a drop-down list. Once you have selected a Serial Number, you will be able to approve it.

Change Serial Number

No wholegood has been found matching the serial number.

Please select an alternate wholegood:

Please select an alternate wholegood

Cancel Accept



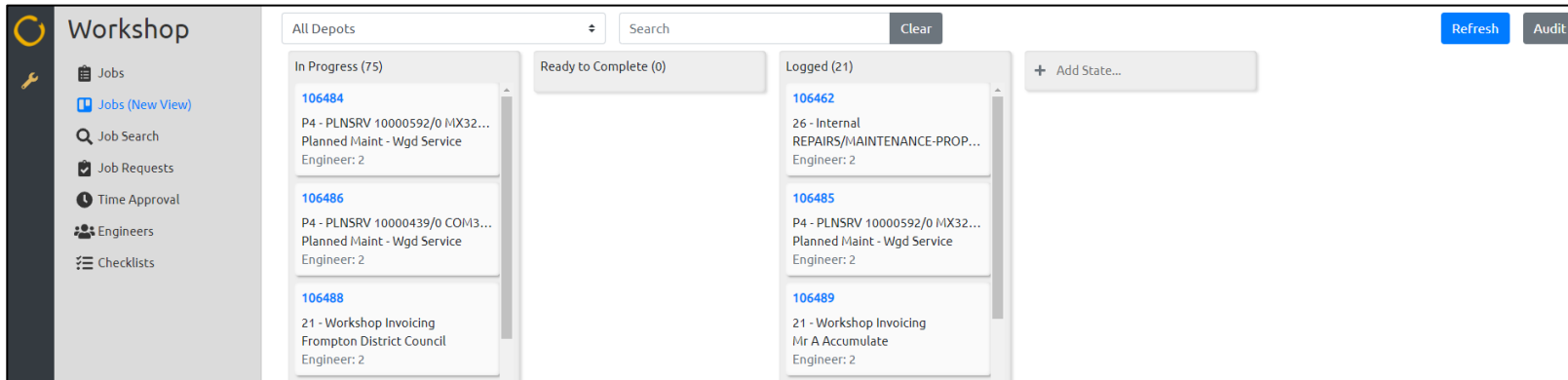
Did you know?

If you approve a Serial Number change in the Wholegood Tab, the Serial Number will be updated in the Engineers Tab and the Data Tab, and the change will also be updated in the Job in Gold.

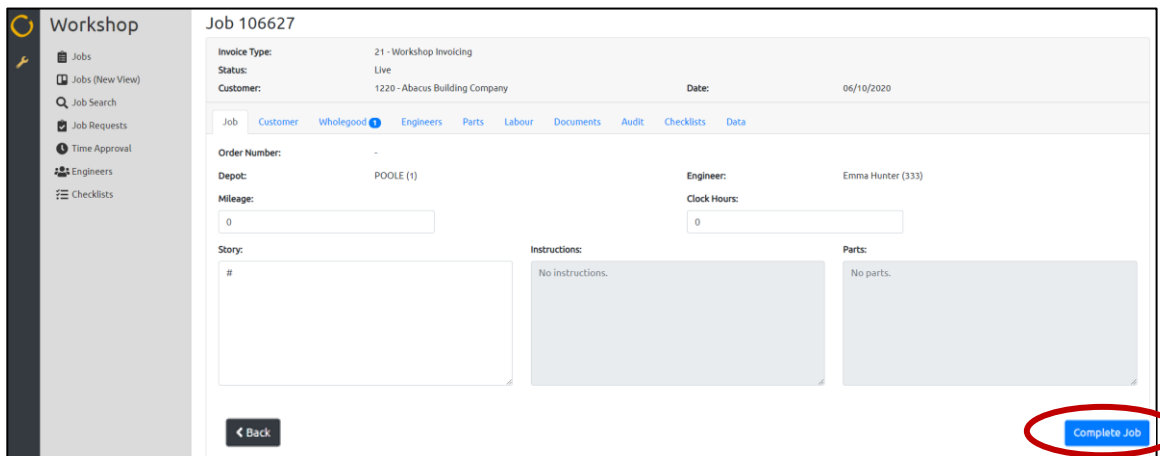
Complete jobs in the Portal

You must mark the jobs as completed in the Portal, and not in Gold. If jobs are marked as completed in Gold and then the status of the job is changed, the job could show up in an incorrect Portal column.

In the Jobs tab on the Portal you will see a new column called 'Ready to Complete', situated between the 'In Progress' column and the 'Logged' column. When all engineers assigned to the job have marked their work as 'complete' in the App, the job automatically moves to the 'Ready to Complete' column.



When you are ready to complete the job, click on it to open it in full. At the bottom right-hand side of the screen, you will see a 'complete' button.



When you press the complete button, it will open a new screen where you can choose what information to display on the job confirmation. This includes the following data:

- Mileage
- Clock Hours
- Signature
- Job Story

Workshop

Complete Job 106627

Mileage: 152 (+)

Clock Hours: 339839 (+)

Signature: (+)

Reset Order

06/10/2020 11:09am | Emma Hunter (Parts Notes)
Engineer 2's parts notes will show here

06/10/2020 12:01pm | Dann Thomas (Parts Notes)
Engineer 1's parts notes will show here
If Engineer 1 adds more parts notes, they will show here

06/10/2020 11:52am | Dann Thomas (Customisable Story)

Engineer 1's story will show here
If engineer 1 adds more detail to the story, then it will show here

06/10/2020 11:48am | Emma Hunter (Customisable Story)

Engineer 2's story will show here

Back

Complete



Did you know?

The raw data shown on the left-hand side of the screen includes the job activity comments from when the engineer stops labour, as well as parts notes, story comments, customisable comments and general jobs comments added by the engineer throughout the job.

Building the Job Confirmation - Mileage

The mileage will automatically populate with the sum total of all the Mileage submitted to the job by each engineer who has worked on it.

You can choose to leave this as it is, or you can change it by clicking on the cross next to the Mileage section.

The screenshot shows a 'Workshop' sidebar on the left with 'Jobs' and 'Jobs (New View)' options. The main area is titled 'Complete Job 106627'. Below the title, there are two input fields: 'Mileage' with the value '152' and 'Clock Hours' with the value '339839'. A red circle highlights a '+' icon to the right of the Mileage field.

This will open a new box where you can choose what Mileage to display on the Job Confirmation.

The dialog box is titled 'Mileage' and has a close button (X) in the top right. It contains an input field for 'Miles' with the value '152' and a blue 'Total' button. Below this is a list of engineers and their mileages: 'Dann Thomas' with 73 miles and 'Emma Hunter' with 79 miles. At the bottom, there are 'Cancel' and 'Accept' buttons.

Engineer	Mileage
Dann Thomas	73
Emma Hunter	79

Using this box, you can either:

- Manually enter Mileage by clicking in the Mileage box, typing the number in, and pressing the 'Accept' button
- Display an individual engineers Mileage by selecting the engineer and pressing the 'Accept' button

If you change your mind and want to display the total of all Mileage combined, simply press the 'Total' button. This will revert the Mileage to the original number.

Building the Job Confirmation – Clock Hours

The Clock Hours will automatically populate with the highest Clock Hours that have been submitted by the engineers.

You can choose to leave this as it is, or you can change it by clicking on the cross next to the Clock Hours section.

The screenshot shows a 'Workshop' sidebar on the left with 'Jobs' and 'Jobs (New View)' options. The main area is titled 'Complete Job 106627'. It features two input fields: 'Mileage' with the value '152' and 'Clock Hours' with the value '339839'. Both fields have a '+' icon to their right. The '+' icon for the 'Clock Hours' field is circled in red.

This will open a new box where you can choose what Clock Hours to display on the Job Confirmation.

The dialog box is titled 'Wholegood Clock Hours' and has a close 'x' button. It contains a text input field with '339839' and the label 'Hours'. To the right of the input is a blue 'Highest' button. Below this is a list of engineers and their clock hours: Emma Hunter (339839) and Dann Thomas (339729). At the bottom of the dialog are 'Cancel' and 'Accept' buttons.

Using this box, you can either:

- Manually enter Clock Hours by clicking in the Clock Hours box, typing the number in, and pressing the 'Accept' button
- Display an individual engineers Clock Hours by selecting the engineer and pressing the 'Accept' button

If you change your mind and want to display the highest total of Clock Hours submitted, simply press the 'Highest' button. This will revert the data to the highest number.

Building the Job Confirmation - Signatures

The signature box will remain blank until you choose a signature to populate it with. To select a signature, click on the cross next to the Signature box:

Workshop Complete Job 106627

Mileage: 152 Clock Hours: 57239 Signature: [Blank]

This will open a new box where you can choose which Signature to display on the Job Confirmation.

Signature

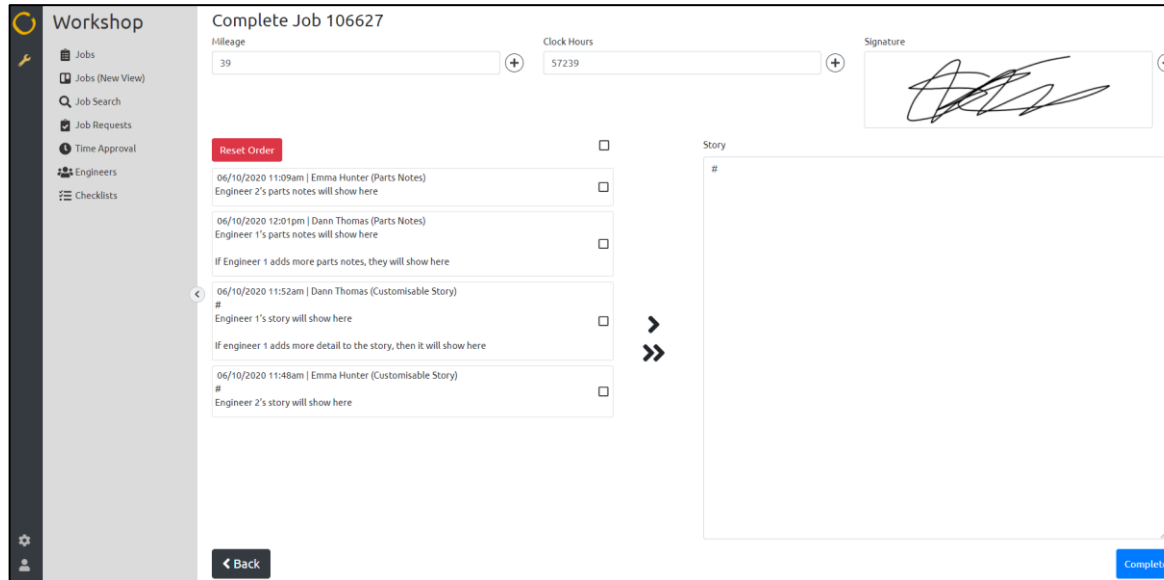
Sam Jones Dann Thomas 06/10/2020 12:02pm	John Parsons Dann Thomas 06/10/2020 12:02pm	Ross Smith Dann Thomas 06/10/2020 11:53am
William Reynolds Emma Hunter 06/10/2020 11:49am	David Rose Emma Hunter 06/10/2020 11:03am	

Cancel Accept

Select the signature you want to display on the Job Confirmation and press the 'Accept' button. You will see the Signature appear in the Signature box.

Building the Job Confirmation – Story

During the job completion process, you can build up the information you want to display on the Job Confirmation. The ‘raw data’ submitted by the engineers is shown down the left side of the screen. The right side of the screen will have a blank box, which you can use to build up the job story.



There are several ways you can get the raw data to the story box.

- Move data across by selecting the ‘tick box’ next to the information you want to use and pressing the > arrow
- Alternatively, you can move all data at once, without the need to select it, but pressing the >> arrows
- You can change the order that the raw data is displayed by clicking on the text and dragging it to the desired location. This feature is designed to be used with the >> arrows, so that when the data has been moved to the story box, you don’t have to cut and paste it into its desired location. If you want to put it back to its original order, click the ‘Reset’ button

Once you have built the story up, you can add extra detail or edit existing detail by clicking into the story box and amending it as necessary. When you are ready, you can click the ‘Complete’ button.

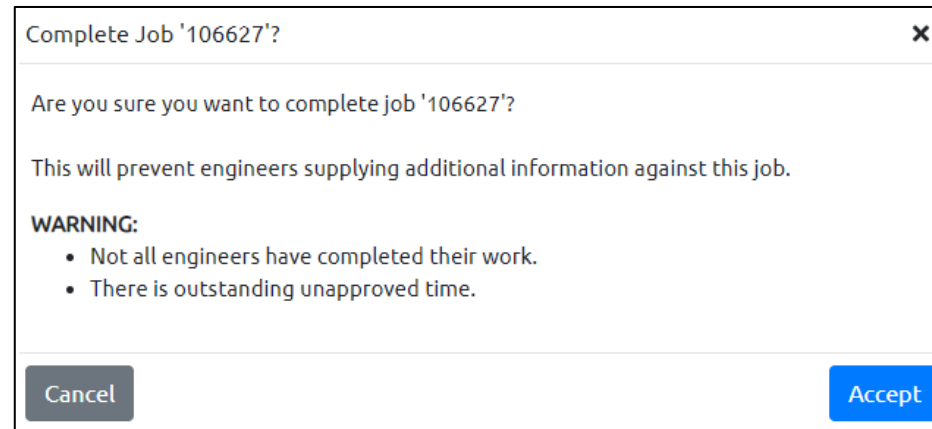


Did you know?

Labour comments added by the engineer when they stop logging time on the job will not be visible on this screen until the time has been approved.

Completing the Job

When you have built your Job Confirmation up, and have pressed the 'Complete' button, you will see a notification appear on the screen asking if you are sure you want to mark the job as completed. This notification will warn you that completing the job will prevent engineers from supplying additional information to it, and will also display warnings based on the outstanding information against that job:



Incomplete Work

If there are engineers assigned to the job who have yet to mark their work as completed in the App, this warning will let you know.

Unapproved Time

If there is outstanding time which has yet to be authorised on the Time Approval screen, this warning will prompt you to do so.

When you are ready, you can press the 'Complete' button. This will mark the job as completed in both the Portal and Gold and will move the job into the 'Logged' column on the Job screen. The job will turn blue on the engineer's App and they will no longer be able to submit data against it.

You can still mark a job as completed even if you have outstanding unapproved time against it, or you have engineers who have not yet marked their work as completed in the App



Did you know?

When a job has been marked as completed in the Portal, it prevents engineers from logging time against it. But managers can still manually add and approve time against this job from the time approval screen.

The Job Confirmation

Once you have marked the job as completed within the Portal, you will see the Job Confirmation with all the data you have selected to display. You can export this to a PDF using the 'Export to PDF' button at the bottom right-hand side of the screen.

Workshop

- Jobs
- Jobs (New View)
- Job Search
- Job Requests
- Time Approval
- Engineers
- Checklists

Job Confirmation - Job No: 106627

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

Acc/Order No 1220/	Date 06/10/2020	Stk No. 15000284	Reg No.	Job Type Workshop Invoicing
Make/Model Specification MAIN FRANCHISE EHTRAC				
Serial No 123456789B	Clock 57239	Van Mileage 39		

Job Description Workshop Invoicing
Contact

Customer Name: SAM JONES **Signature Date:** 06/10/2020 12:02pm

Customer Signature

Job Instructions

Job Story

Engineer 2's parts notes will show here
 Engineer 1's parts notes will show here

 If Engineer 1 adds more parts notes, they will show here

 Engineer 1's story will show here

 If engineer 1 adds more detail to the story, then it will show here

 Engineer 2's story will show here

Parts

Engineer 2's parts notes will show here
 Engineer 1's parts notes will show here

 If Engineer 1 adds more parts notes, they will show here

Service Administrator
 Parts Department
 Service Delivery Manager

Date	Name	Hours	Description

[← Back](#)
Export PDF

The Audit Tab

Activity that is carried out on the App by the engineers will be captured within the Audit Tab of the job. You can search this audit on key words, the engineers name, and the dates (from and to).

Workshop

- Jobs
- Jobs (New View)
- Job Search
- Job Requests
- Time Approval
- Engineers
- Checklists

Job 106627

Invoice Type: 21 - Workshop Invoicing
 Status: Live
 Customer: 1220 - Abacus Building Company Date: 06/10/2020

Job Customer Wholegood **1** Engineers Parts Labour Documents Audit Checklists Data

Search:

Engineer:

From:

To:

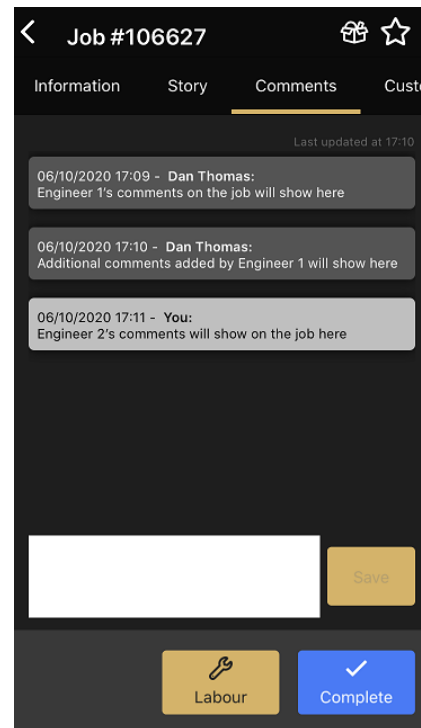
- DT 06/10/2020 06:24pm: **Dan Thomas** Updating job wholegood hours '7f40e2ac-5751-480c-ba42-6f6e9fa5784e' (Gold Service Plus)
- DT 06/10/2020 06:23pm: **Dan Thomas** Updating job serial number '22a3ed8f-5ce9-45e4-a87c-3bad223a61d5' (Gold Service Plus)
- EH 06/10/2020 06:04pm: **Emma Hunter** Completed Job
- EH 06/10/2020 06:04pm: **Emma Hunter** Updated job '106627' sub-state to 'Logged'
- EH 06/10/2020 06:04pm: **Emma Hunter** Update Clock Hours
- EH 06/10/2020 06:04pm: **Emma Hunter** Updated Mileage
- EH 06/10/2020 06:04pm: **Emma Hunter** Updating job work done 'ef641117-14f6-4db5-8f38-8c2a15bf6586' (Gold Service Plus)
- EH 06/10/2020 06:04pm: **Emma Hunter** Updating job note '1c176940-6dbc-4c7d-b622-edb8e88fdace' (Gold Service Plus)
- EH 06/10/2020 06:03pm: **Emma Hunter** Creating Job Activity (Gold Service Plus)

New screens and colours in the App

Comments Screen

Engineers will see a couple of new screens within the App. The first is the Comments screen. This screen allows engineers to add their comments about the job, so that everyone can see what they have done on the job. It is designed to allow engineers to 'talk' to each other about the job, without needing to actually contact each other.

The comments screen will display all comments that have been added by any engineer who has worked on the job, whether they have been formally assigned to it or not. Other engineers comments will be dark grey, and their own comments will be light grey.

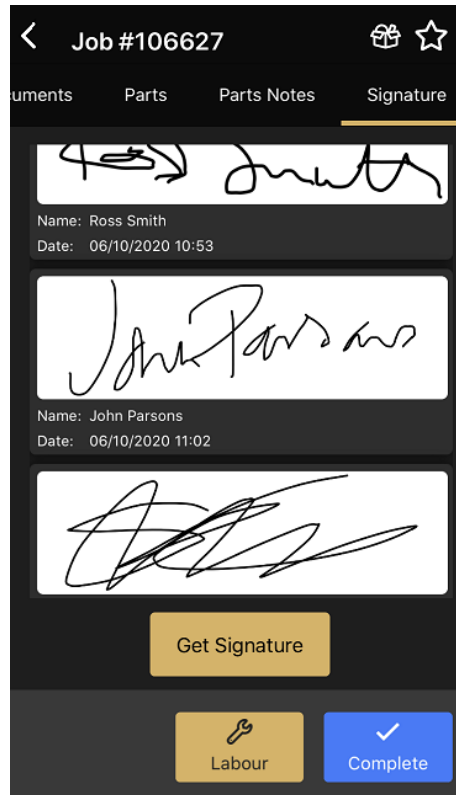


Did you know?

The comments added to the job by the engineer will only be visible in the Portal when you go through the job completion process. When you press the 'Complete' button in the Portal, you will see the engineer's comments and can use them to build up the Job Story.

Signatures Screen

Engineers will now be able to see all of the signatures they have previously captured on the job in the Signature screen and will be able to capture more if necessary.



Did you know?

Engineers will only be able to see the signatures they have captured on the App. Signatures captured by other engineers working on the job will not be visible to them.

Work Completion Screen

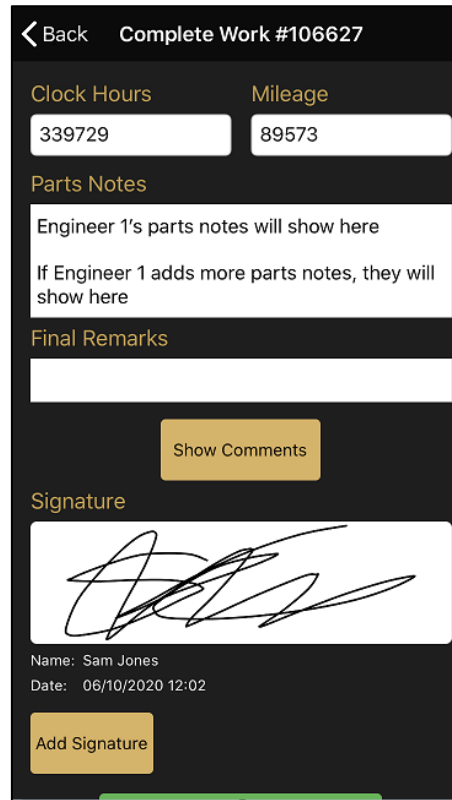
When engineers press the 'Complete' button to mark their work as completed in the App, they will see some changes to the completion screens.

Signature Tab



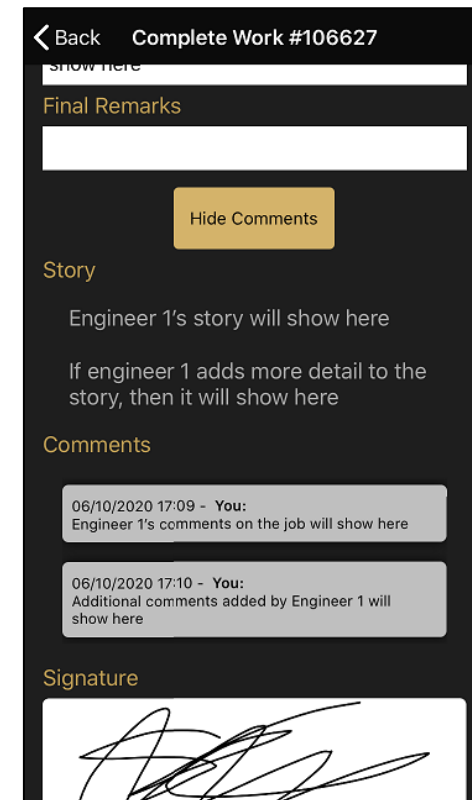
Firstly, they will now be able to see all of the signatures they have captured on the job, and can add more signatures at this point if necessary

Work Completion – Show Comments



Secondly, they will see a button which says 'Show Comments'. When they press this button, it will show all the comments added by the engineers

Work Completion – Hide Comments



When all the engineer's comments are visible, the button will change to 'Hide Comments'. They can press this to hide the comments from the screen

New job colours

To enable more than one engineer to work on a job at the same time, the job needs to remain open. Therefore, instead of engineers marking jobs as completed, they now mark their 'work' as completed. This keeps the job open for other engineers but closes the job to that specific engineer.

To allow engineers to see which work they have marked as completed, we have added a new colour status of 'Gold' to the jobs. The colours that will now be displayed are:

Job #106627

Abacus Building Company
Workshop Invoicing. .

GREY - Jobs that have not yet been started by the engineer

Job #106627

Abacus Building Company
Workshop Invoicing. .

GREEN - Jobs that the engineer has started to log time against

Job #106627

Abacus Building Company
Workshop Invoicing. .

GOLD - Jobs that engineer has marked as completed (but are still open to other engineers)

Job #106627

Abacus Building Company
Workshop Invoicing. .

BLUE - Jobs that have been marked as completed on the Portal (and is now in logged for checking)

The job colour will only change for the engineer working on it and is specific to each engineer. These colour changes will not be shared with other engineers. Therefore, if one engineer marks their work as completed, it will turn Gold for them, but not for other engineers assigned to the job. Each engineer can complete work separately.