

Gold Service – Jobs (Multi Authorisation) Product Manual



Table of Contents

| | | |
|----|--|---|
| 1. | OVERVIEW OF FILTER FUNCTIONS | 3 |
| 2. | CREATING AND AMENDING FILTER CRITERIA | 4 |
| | 2.1 CREATING A ONE-OFF FILTER | 4 |
| | 2.2 CREATE AND ACCESS A SAVED FILTER | 5 |
| | 2.3 AMEND AN EXISTING FILTER | 5 |
| | 2.4 CLEAR THE FILTER CRITERIA | 5 |
| | 2.5 DELETE A FILTER | 5 |
| 3. | DOCUMENT ICON COLOUR CHANGES | 6 |
| 4. | SORTING THE JOBS IN EACH COLUMN | 6 |
| 5. | VIEW THE NUMBER OF ENGINEERS ASSIGNED TO A JOB AND HOW MANY HAVE COMPLETED THEIR WORK IN THE APP | 7 |
| 6. | SEND JOB CONFIRMATIONS AND CHECKLISTS TO DOC STORE | 7 |
| 7. | USEFUL INFORMATION | 8 |

1. OVERVIEW OF FILTER FUNCTIONS

We have added a new filter function to the Jobs (Multi Authorisation) screen, to allow you to filter on certain criteria, giving you visibility of only those job cards that are relevant to you. This new function will allow you to save filters for future use or apply a one-off view. The filter function can be configured per user and persist indefinitely, even when you have logged out of the Portal.

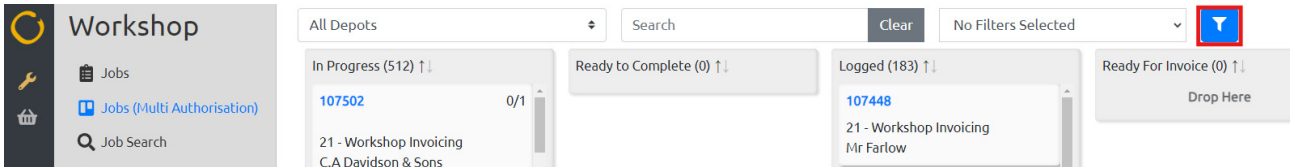
For example, you can filter on the following criteria:

- ✓ **Show Warranty Jobs**
Displays warranty jobs which are based on the program code of the Invoice type.
- ✓ **Show Jobs with Non-Gold Service Engineers**
Displays jobs with non-Gold Service engineers (those that do not have a licence for Gold Service) associated with it. Note: If there are multiple engineers on a job, this filter could include jobs with a mixture of Gold Service and non-Gold Service engineers.
- ✓ **Show Jobs with Documents to Approve**
Displays jobs that have outstanding documents that need to be approved in the Portal before they are purged.
- ✓ **Show Jobs with Multiple Engineers**
Displays jobs that have more than one engineer associated with it.
- ✓ **Hide Repeatable Jobs**
Displays only non-repeatable jobs.
- ✓ **Invoice Type**
Jobs can be filtered on multiple invoice types.
- ✓ **Gold Status**
Jobs can be filtered based on their Gold status, such as created, initiated, live, on hold, and logged for checking.
- ✓ **Department**
Jobs can be filtered based on the department such as agriculture or grounds care, which is recorded against the engineer.
- ✓ **Columns Hide/Show**
Any 'sub state' columns that have been created can be either shown or hidden using the toggle button. These could be columns used at a different depot or a different department.

How does it work?

In the Jobs (Multi Authorisation) screen, you will see:

- The Search Bar (which already exists)
- The Filter Button (which is new)



When you click the Filter button, a filter pop up will appear to allow you to select your desired criteria. When a Filter is applied the filter icon will turn Gold.



Here you can create one-off filters or save a filter to be accessed again in the future.

2. CREATING AND AMENDING FILTER CRITERIA

To create a new filter or amend any existing filters click the filter button. This will open the filter pop-up screen, as below:

2.1 Create a one-off filter

1. With the filter pop-up screen open, **add the desired criteria** and **click Apply**.
2. Do not click Save New. The changes will be displayed but won't be saved permanently against the filter.

2.2 Create and access a saved filter

1. To create a saved filter to access in the future simply **select the desired criteria, give the filter a title** using the **Create Filter** box and click **Save New**.
2. The filter can now be accessed at any time by two methods: via the **Select saved filter drop-down box** in the filter pop up, or using the **drop-down box** next to the filter button on the home screen.
3. Multiple saved filters can be created with different configurations and are saved for each user profile/login.

2.3 Amend an existing filter

1. Amend existing filters by **choosing a filter** from the **Select Saved Filter** box, **amend the criteria**, and click **Save Changes**.
2. Click **Apply** to display the jobs that match the selected parameters.
3. If you do not click Save Changes and **only click Apply**, the changes will be displayed but won't be saved permanently against the filter.

2.4 Clear the filter criteria

1. To clear all the filter criteria applied, click the **Filter icon**, select the **Clear Criteria** button, and then click **Apply**.

2.5 Delete a filter

1. To delete a saved filter select it from the **Select Saved Filter** drop-down and click the **Bin icon**.
2. A message will pop up on the top right of the screen confirming the deletion.





Did you know?

If you want to remove any filters, simply open the filter, click the **Clear** button and then click the **Apply** button.

3. DOCUMENT ICON COLOUR CHANGES

The Document icon on the Jobs (Multi Authorisation) cards is now colour-coded to highlight the status of an image and show when it has 7 days or less remaining before it expires.

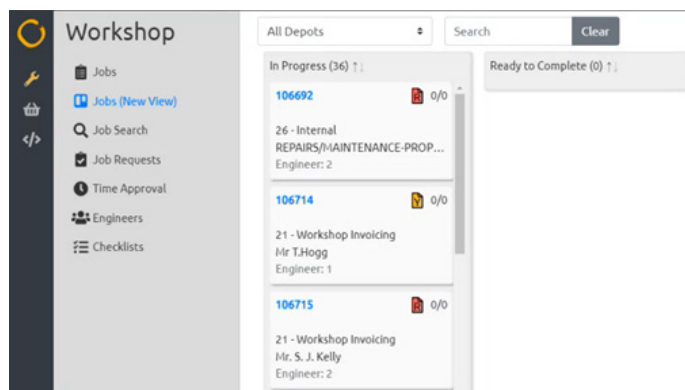


Yellow Icon – shows images that have not been approved.



Red Icon – shows images that have not been approved and have 7 days or less remaining before they expire.

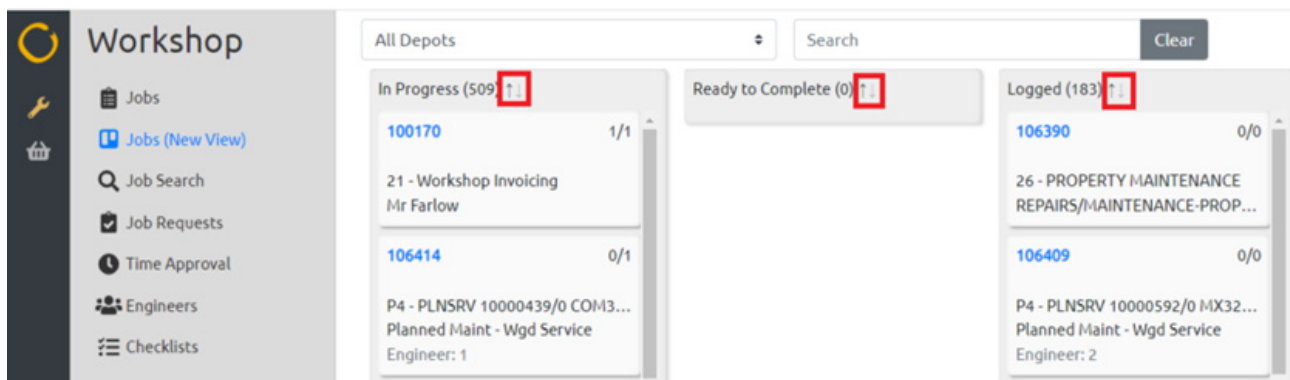
This is in line with the colour coding on the documents tab. The letter on the document icon (R or Y) signifies Red or Yellow to support users who are colour blind.



4. SORTING THE JOBS IN EACH COLUMN



A sort function is available at the top of each column to sort the jobs by created date in ascending or descending order.





Do you have jobs in Ready to complete that should be In Progress?

This could be due to an engineer working on the job when they are not assigned to it. For example: You assign an engineer to a job and they log activity on the App. Then another engineer (who isn't formally assigned to the job) also logs activity on the app. Both engineers mark their work as completed in the App, and the job moves to the Ready to Complete column. If the engineer who was not formally assigned to the job then reactivates the job in the App, this change will not be reflected in the Portal, and the job will not move to the In Progress column.

5. VIEW THE NUMBER OF ENGINEERS ASSIGNED TO A JOB AND HOW MANY HAVE COMPLETED THEIR WORK IN THE APP

The number of engineers associated with the job versus the number of engineers who have completed their work on the App is now visible against each card.

For example, if two engineers are associated with a job and only one has completed their work in the App, the Job Card will show ½.

6. SEND JOB CONFIRMATIONS AND CHECKLISTS TO DOC STORE

Send Job Confirmations to Doc Store

You can send job confirmations directly to Doc Store when you complete the job in the Portal. Simply click **Send to Doc Store**, and the job confirmation will be held against the job in Gold.





Print or Export Checklists and send to Doc Store

From the Checklist tab in the job, you can print or export them to PDF to be sent to Doc Store (which will be stored against the job in Gold).

Job 183945

| | |
|---------------|------------------------|
| Invoice Type: | 14 - AGRICULTURAL JOBS |
| Status: | Live |
| Customer: | 1200 - Name_1200 |
| Date: | 22/05/2024 |

| | | | | | | | | | |
|-----|----------|-----------|-----------|-------|--------|-----------|-------|-------------------|------|
| Job | Customer | Wholegood | Engineers | Parts | Labour | Documents | Audit | Checklists | Data |
|-----|----------|-----------|-----------|-------|--------|-----------|-------|-------------------|------|

| Title | Mandatory | Completion stage | Last Updated | Progress | |
|-----------------|-----------|------------------|--------------------|--|---|
| Health & Safety | | Start of job | 10/06/2024 03:56pm | <div style="width: 100%; height: 10px; background-color: blue;"></div> 3 / 3 |   |

- Click on either the **Print** or **Edit icon** to open the checklist.
- Both options will allow you to edit the checklist, export it to PDF for printing, or send it directly to Doc Store.



Did you know that you must have the Workshop Doc Store Licence in order to send these Documents to Doc Store? If you do not have a Doc Store licence please contact your account manager or sales@ibcos.co.uk

7. USEFUL INFORMATION



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