



Eaco Job Settings Group

USER GUIDE

© Eaco Systems 2019

INDEX

Introduction.....3

User Instructions

1. Get Started.....4-5
2. WM Configuration.....6-7
3. Settings: Main View.....8-10
4. Create a New/Edit a Job Settings Group.....11-17
5. Add Invoice Stamp Variables.....18-20
6. Add a Custom Variable.....21-22
7. Create Checklist.....23-24

INTRODUCTION

"Quality is not an act, it is a habit." - Aristotle

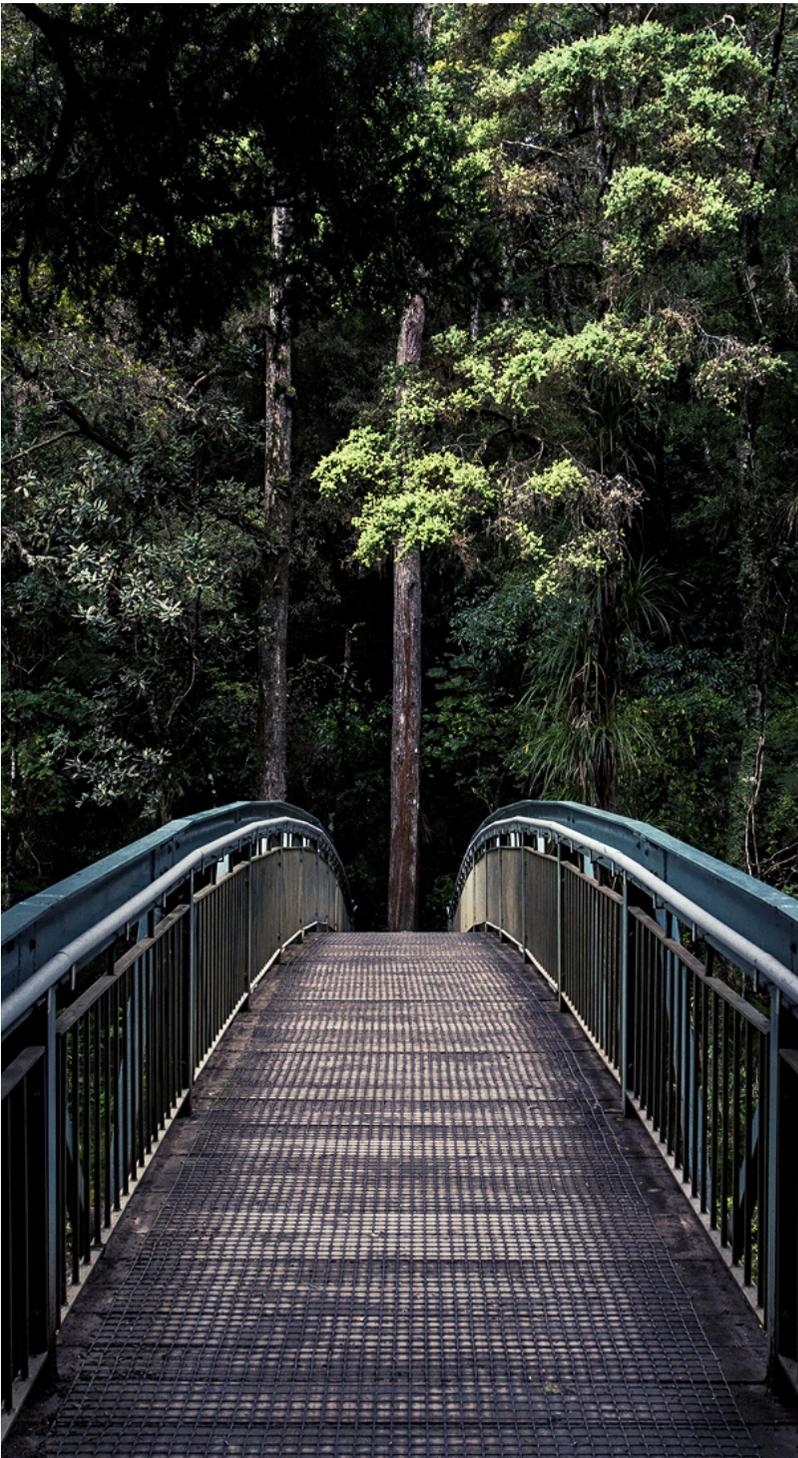
Imagine if you could meet the exacting needs of each of your clients every single time! We all know the pain of a client that wants their jobs completed as per their precise specifications. You try to convince them they should follow standard procedure, but no, they want it done their way.

Bring in the use of an Eaco Job Settings Group, which bridges the gap between the challenge and the need to fulfil specific requirements. Ultimately your reputation for delivering client satisfaction will be strengthened. A Job Settings Group enables you to set up a type of job that is automatically configured and customised to meet the exact requirements that have been set by you (or for you by your client).

Need to do a job in a specific way? Set a Workflow. Need specific workers to do that type of job? Set users to be automatically allocated. Need specific reporting requirements? Set tags and custom variables to enable custom reports.

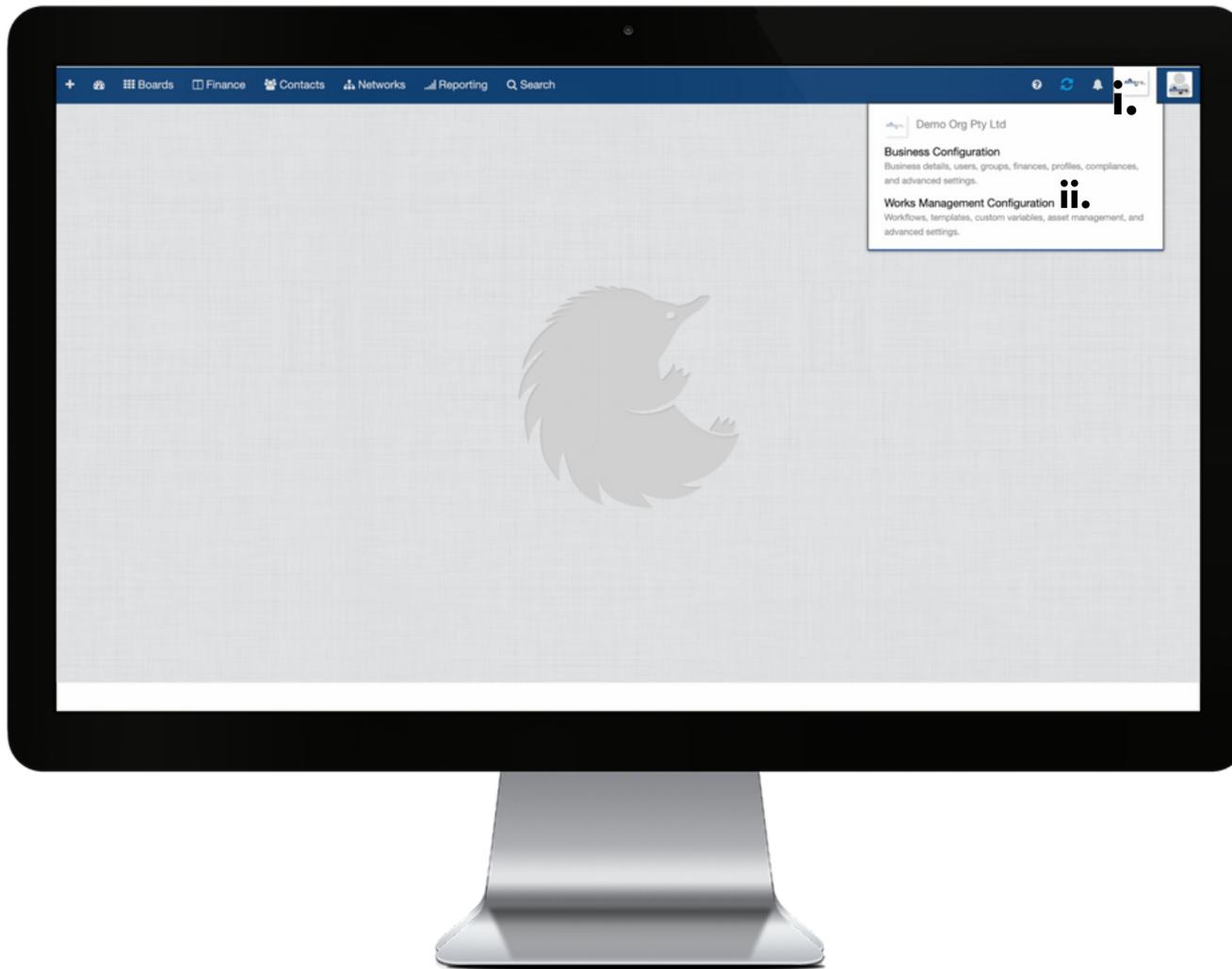
The power of an Eaco Job Settings Group is extensive. However, we encourage you to let your creative juices flow and your imagination run on how you will use its functionality to impress your clients.

#ajobwelldone



ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

1. GET STARTED

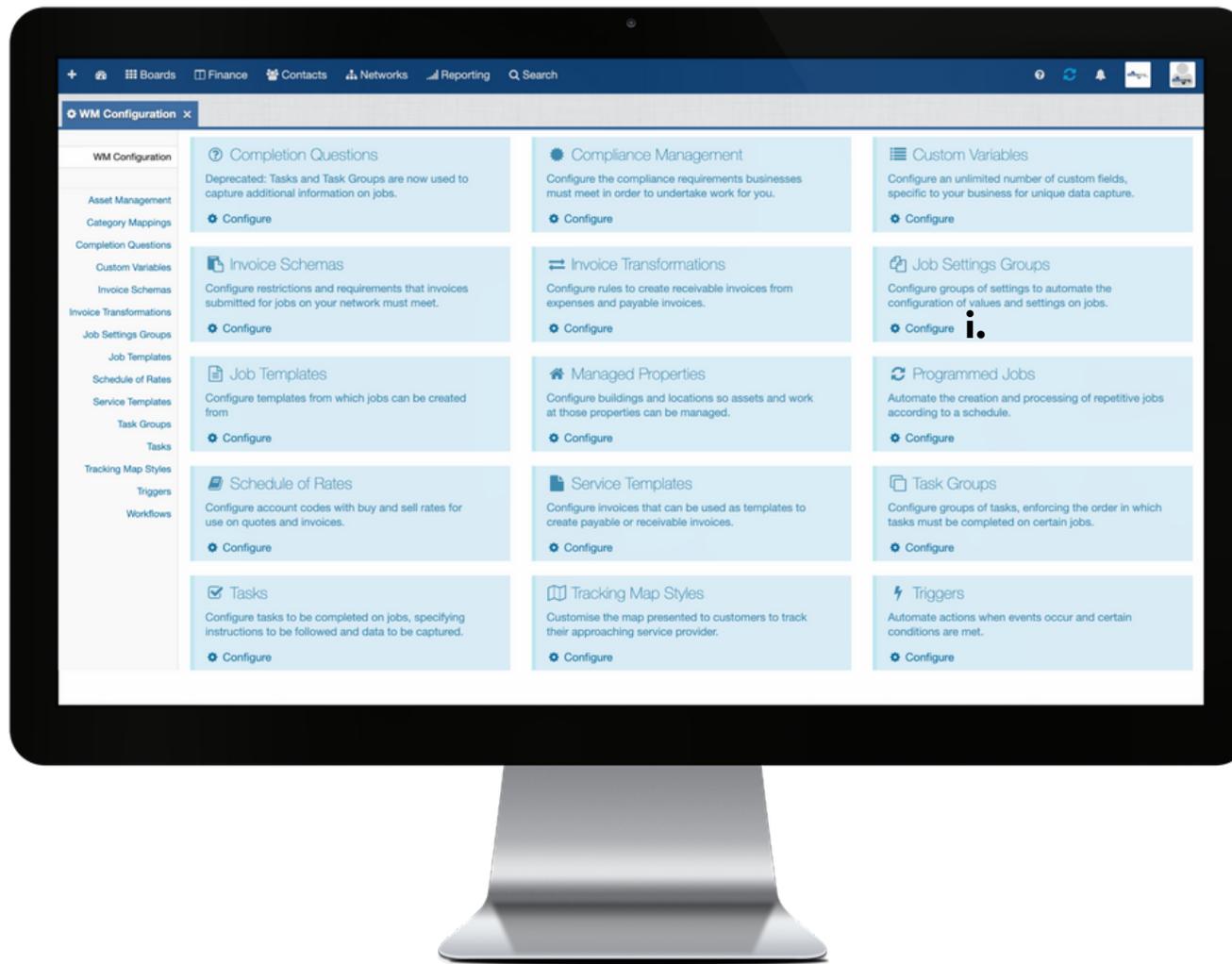


Establish a Job Settings Group via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

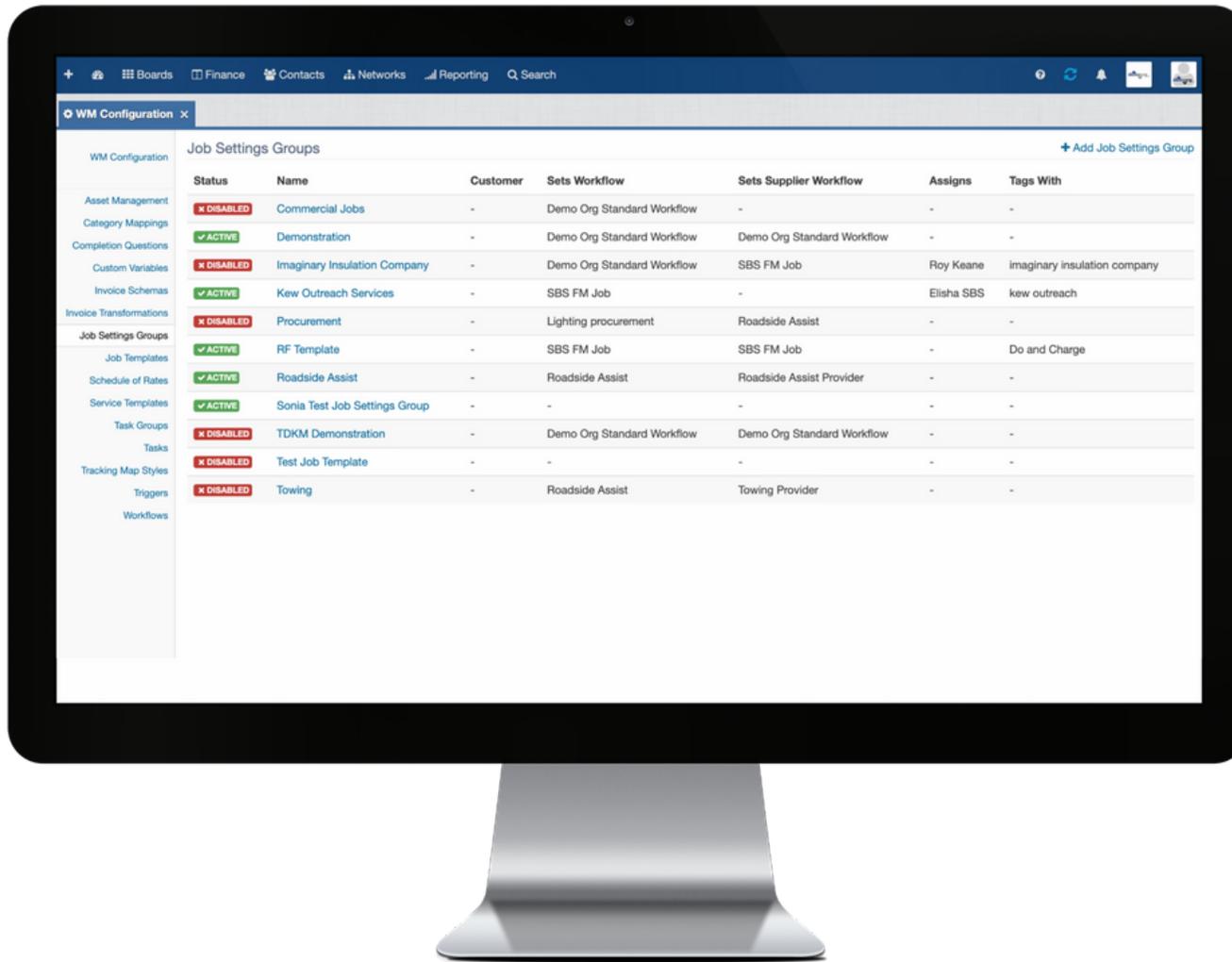
2. WM CONFIGURATION



i: To commence establishing a Job Settings Group feature, click on Configure.

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

3. SETTINGS: MAIN VIEW



Configure settings to establish a customised group of job settings for each type of Job. You can tailor a Job Settings Group to enable you to capture the relevant data for each specific type of job as well as automatically allocating relevant Users and linking Workflows, Tags, Business Rules and the like.

Legend: main view of Job Settings Group page

Status: If Active, the template can be applied to jobs. If Disabled, the template cannot be applied to jobs but will still be linked to jobs that it has previously been linked to.

Name: the name of the Job Settings Group, which is applied upon creation of the template.

Customer: in this regard, the Customer is effectively your organisation's Principal. The Principal is ultimately the source of job leads (i.e. the work to be done).

Sets Workflow: the workflow that will be applied to the job.

Sets Supplier Workflow: the workflow applied to the job that will enable a Supplier to track and/or report on their job completion progress.

Assigns: lists the Users that are to be assigned to the job.

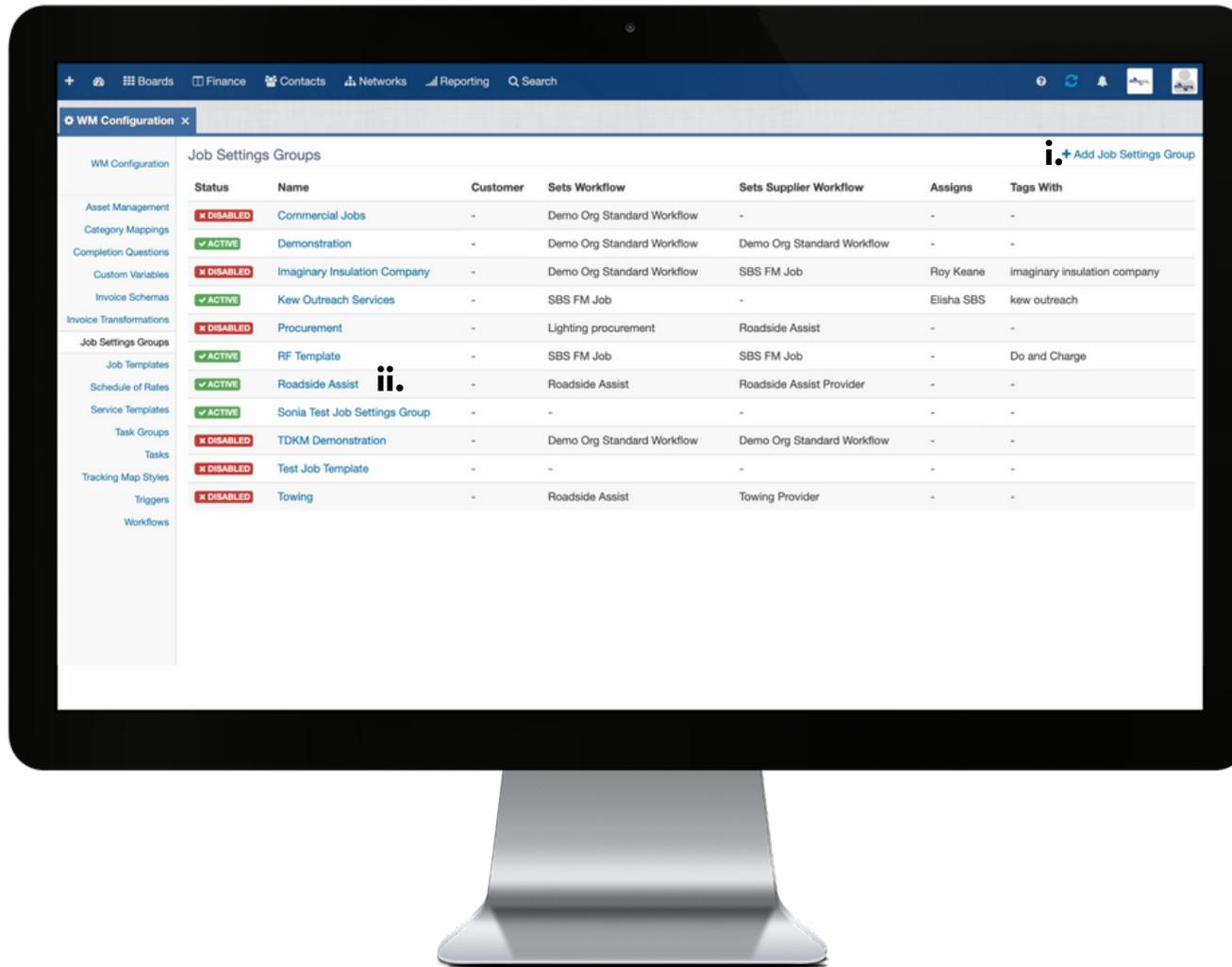
Tags With: lists description Tags that are to be applied to the job.

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

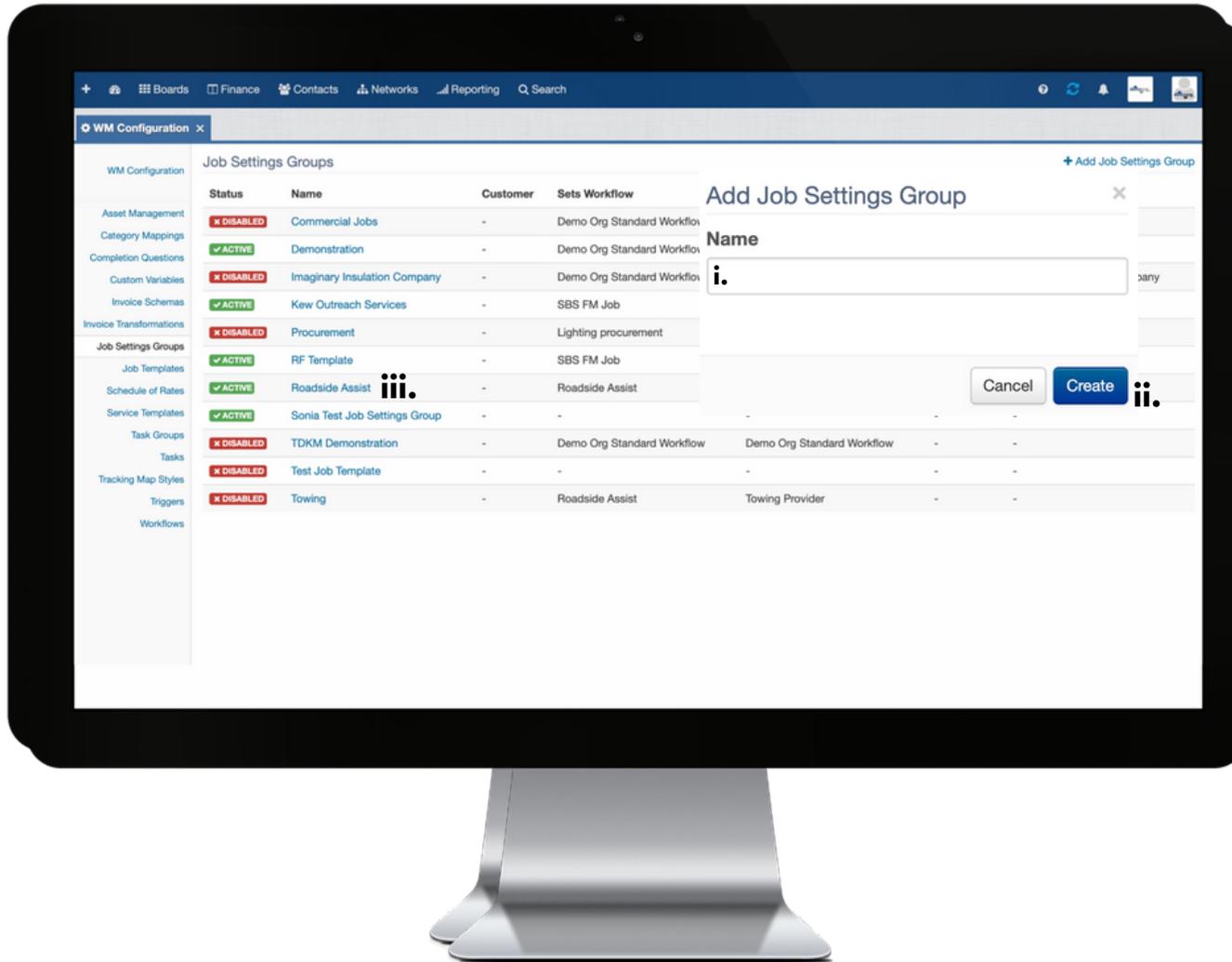


4. CREATE A NEW/EDIT A JOB SETTINGS GROUP





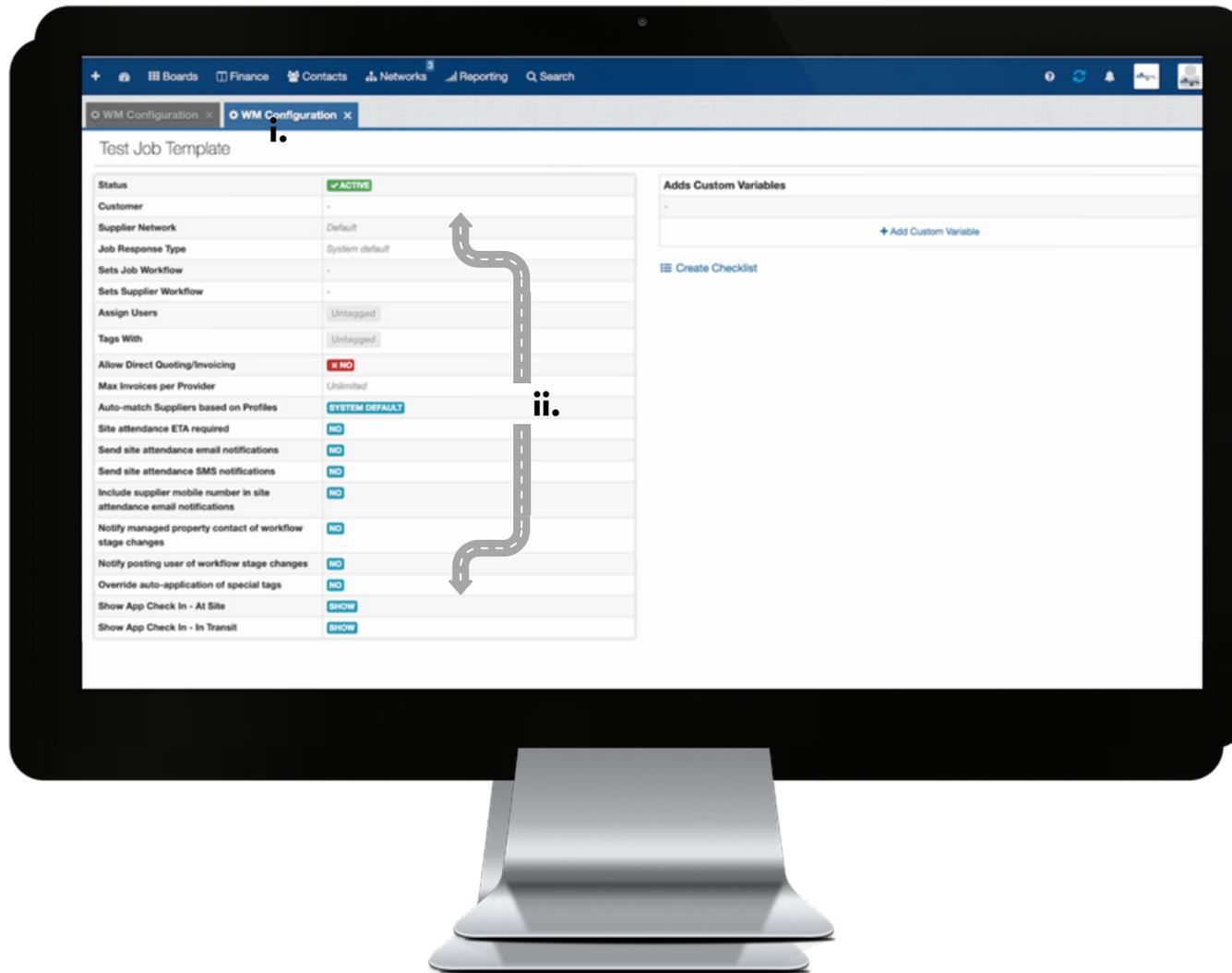
i: click the + icon to open the Add Job Settings Group dialog box; or
ii: to edit the details of an existing Job Settings Group, click the name to open the applicable Job Settings Group dialog box.



i: enter the name of the Job Settings Group to be created.

ii: click Create to confirm. Upon clicking the Create button, the created Job Settings Group will appear listed in the main list view.

iii: to finalise completion of a newly created Job Settings Group, click on the Name found in the main list view.



i: upon clicking on the Name of the Job Settings Group listed, the Job Settings Group will open in a new tab.

ii: all Job Settings Group fields are editable - click the field or hover your mouse over to the right of the field box and click the Edit tool icon to edit the field accordingly.

Job Settings Group Fields

Status

Customer

Supplier Network

Job Response Type

Sets Job Workflow

Sets Supplier Workflow

Assign Users

Tags With

Allow Direct Quoting/Invoicing

Max Invoices per Provider

Auto-match Suppliers based on Profiles

Site attendance ETA required

Send site attendance email notifications

Send site attendance SMS notifications

Include supplier mobile number in site attendance email notifications

Notify managed property contact of workflow state changes

Notify posting user of workflow stage changes

Override auto-application of special tags

Show App Check In - At Site

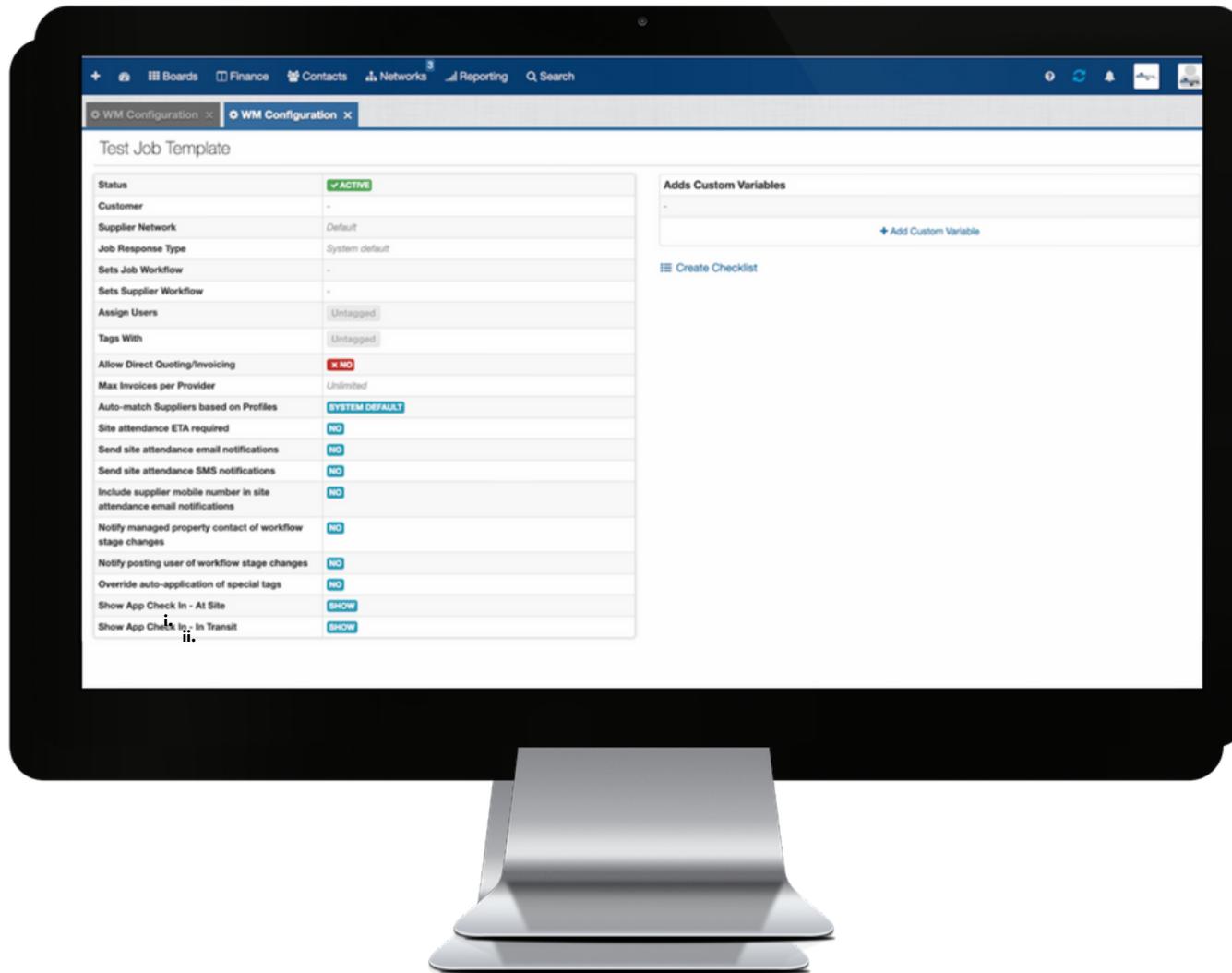
Show App Check In - In Transit

Automatically share attachments added via Eaco Mobile with all job participants

Authorisation Stamp/Show Authorisation Stamp (see following page for further details)

Add Custom Variables

Checklist



i: an Authorisation Stamp can be used to mark invoices as 'Approved for Payment' or act as an indicator to prompt an authorised user to sign and date to approve the invoice.

ii. To set the required Authorisation Stamp on the Job Settings Group, click the field or hover your mouse over to the right of the field box and click the Edit tool icon to activate the Show Authorisation Stamp dialog box, which will enable you to select from one of the following three options using the drop down menu:

1. System default: the default stamp will include the name of the authorised user and the date the invoice was approved for payment. If the user's signature is stored in Eaco (email support@eaco.me to configure this), it will also be shown on the stamp.

2. Approved For Payment: this will mark invoices that have been approved for payment with an 'Approved For Payment' stamp.

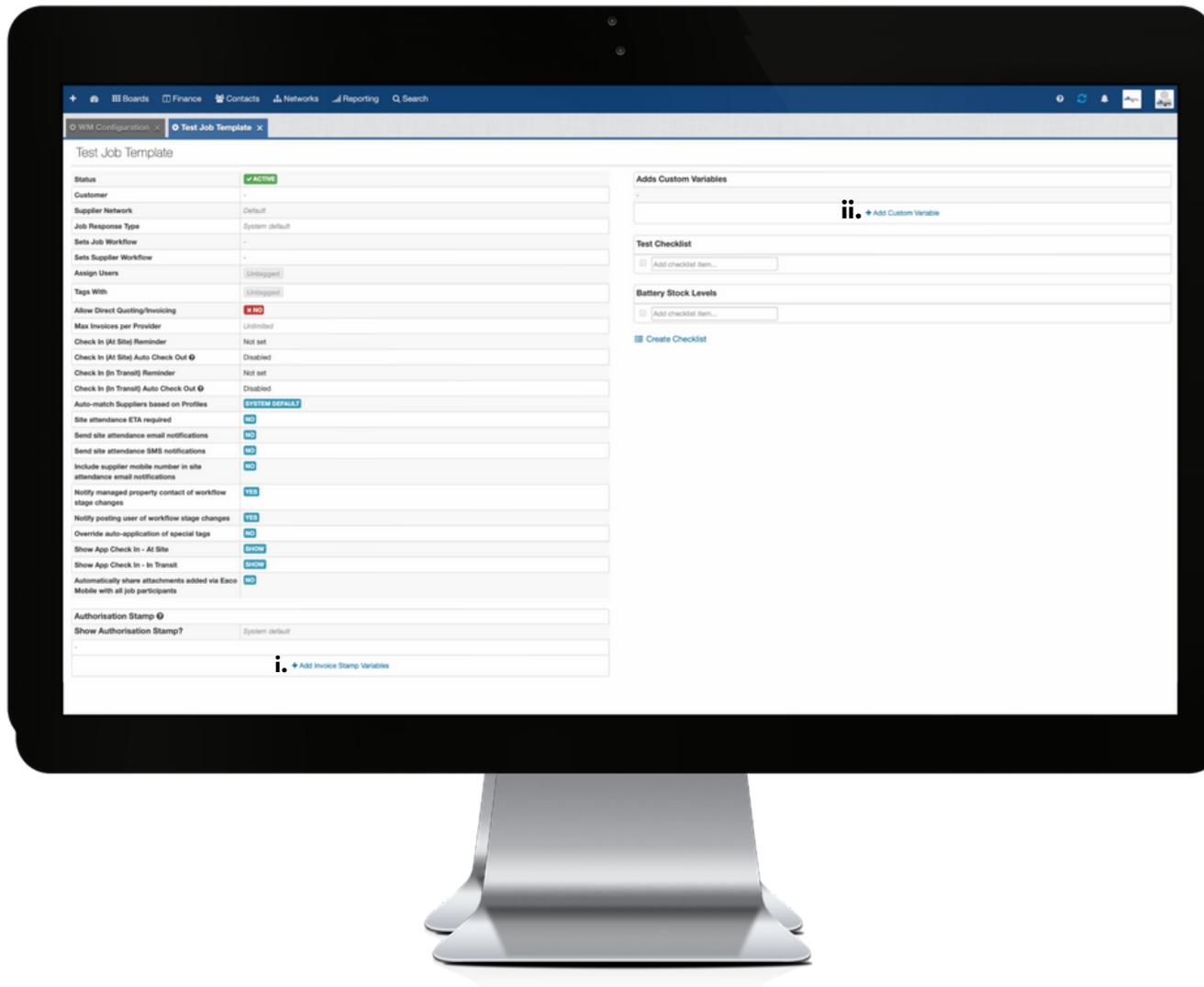
3. Always: puts the stamp on an invoice regardless of whether it has been approved for payment. If an invoice that is not yet approved for payment, is stamped, the stamp will not contain a signature, the date nor the name of the authorising user. However, blank spaces will appear on the printed invoice for the authorised user to sign and date and to supply their name.

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE



5. ADD INVOICE STAMP VARIABLES





i: click the + icon to open the Add Invoice Stamp Variables dialog box.

ii: click the + icon to open the Add Custom Variable dialog box.

Add Invoice Stamp Variable ×

Label

Enter text **i.**

Prefix **Variable** **Suffix**

Enter text None Enter text

ii. **iii.** **iv.**

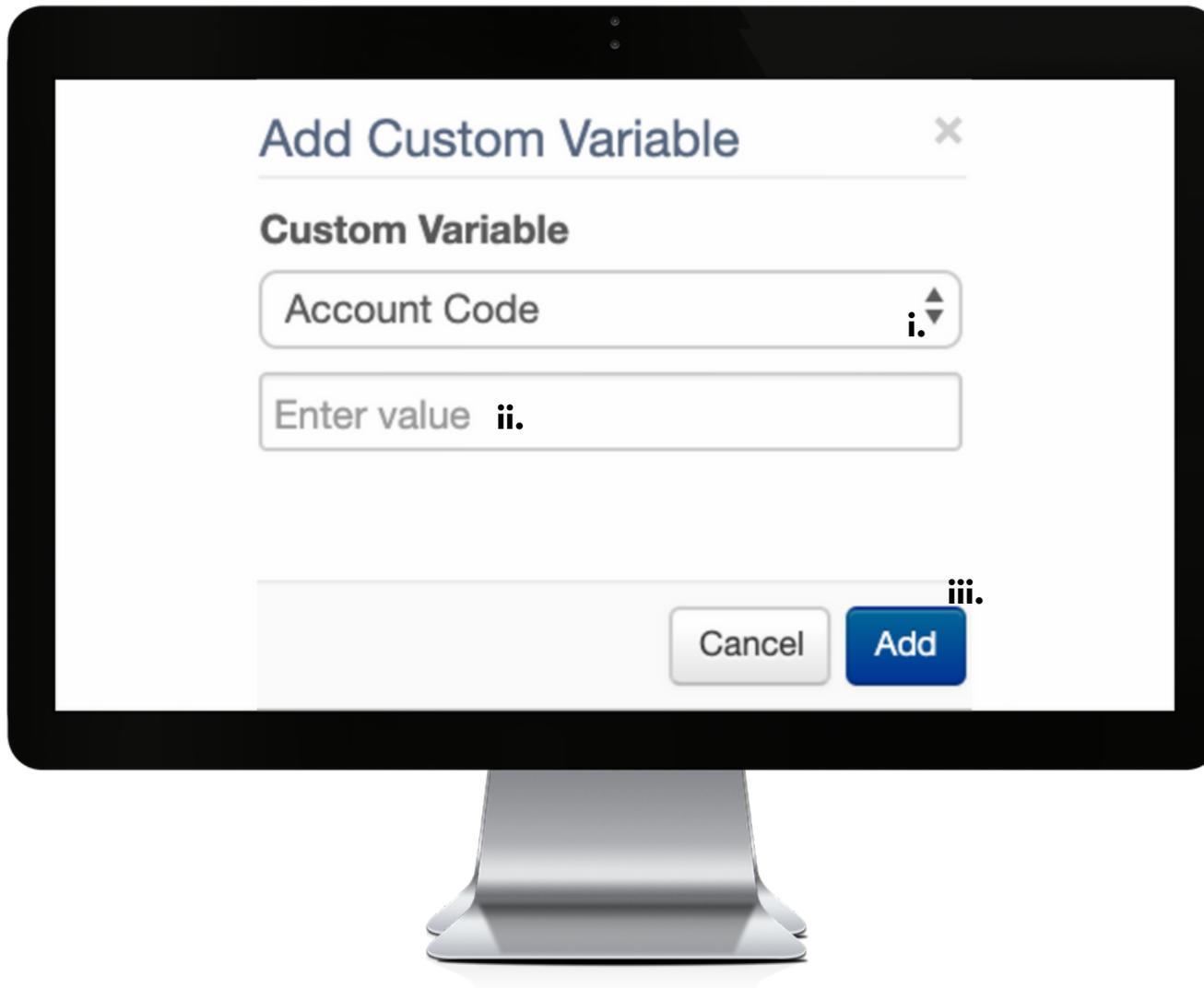
Cancel **Add**

v.

- i:** complete this field to apply a label/name the Invoice Stamp Variable.
- ii:** complete this field to apply a Prefix to the label/name the Invoice Stamp Variable.
- iii:** use the drop down menu to select the relevant Variable.
- iv:** complete this field to apply a Suffix to the label/name the Invoice Stamp Variable.
- v:** click Add to save all applied settings.

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

6. ADD A CUSTOM VARIABLE



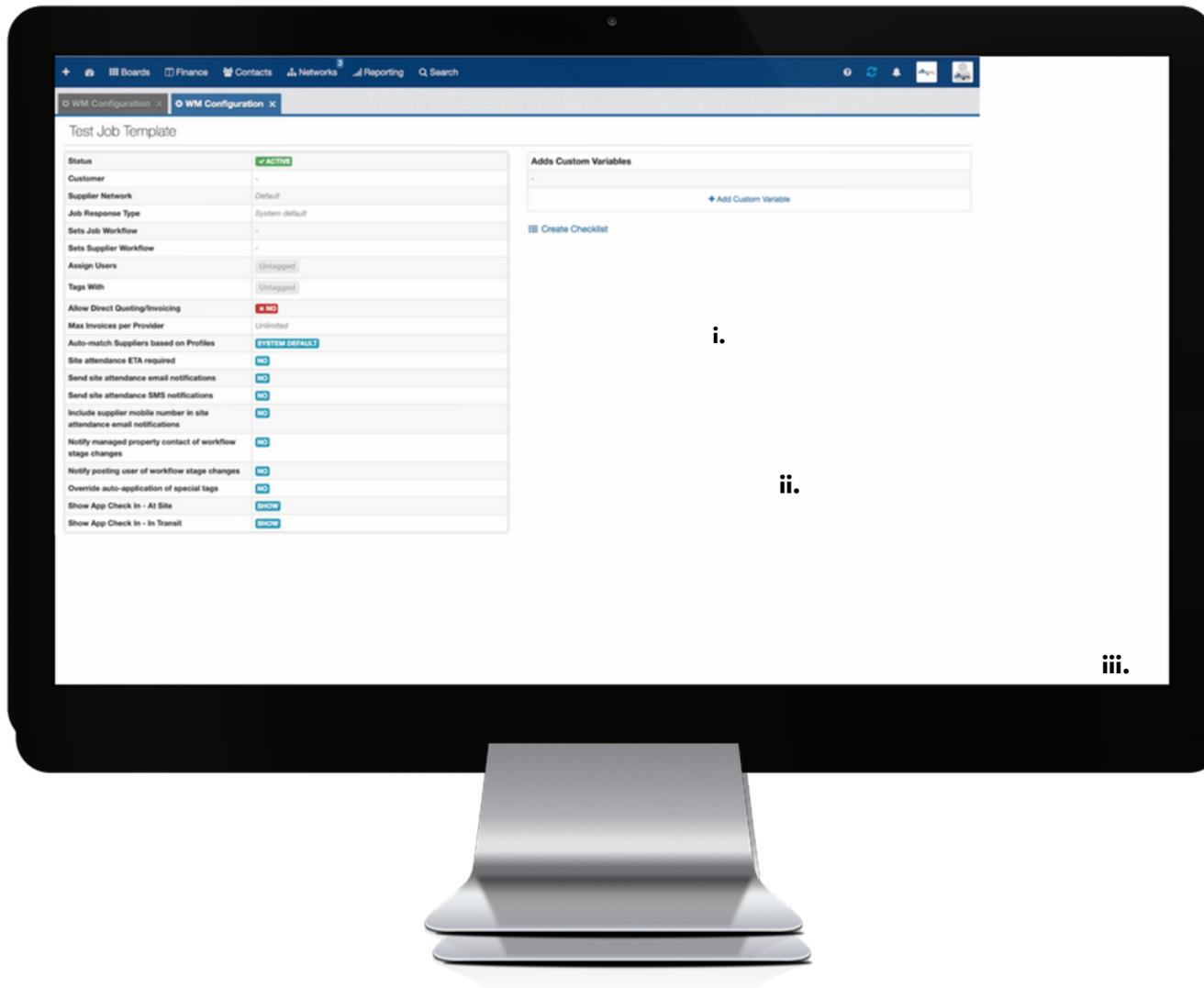
i: use the drop down menu to select the Custom Variable to be applied to the Job Settings Group.

ii: complete this field to apply a value amount.

iii: click Add to save all applied settings.

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

7. CREATE CHECKLIST



- i.** click on Create Checklist to open the dialog box.
- ii.** complete this field by typing in a name for your Checklist.
- iii.** click Save to apply all settings.