



# Eaco Category Mappings

## USER GUIDE

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# INTRODUCTION

***“Computers do the calculating to allow people to transform the world” - Conrad Wolfram***

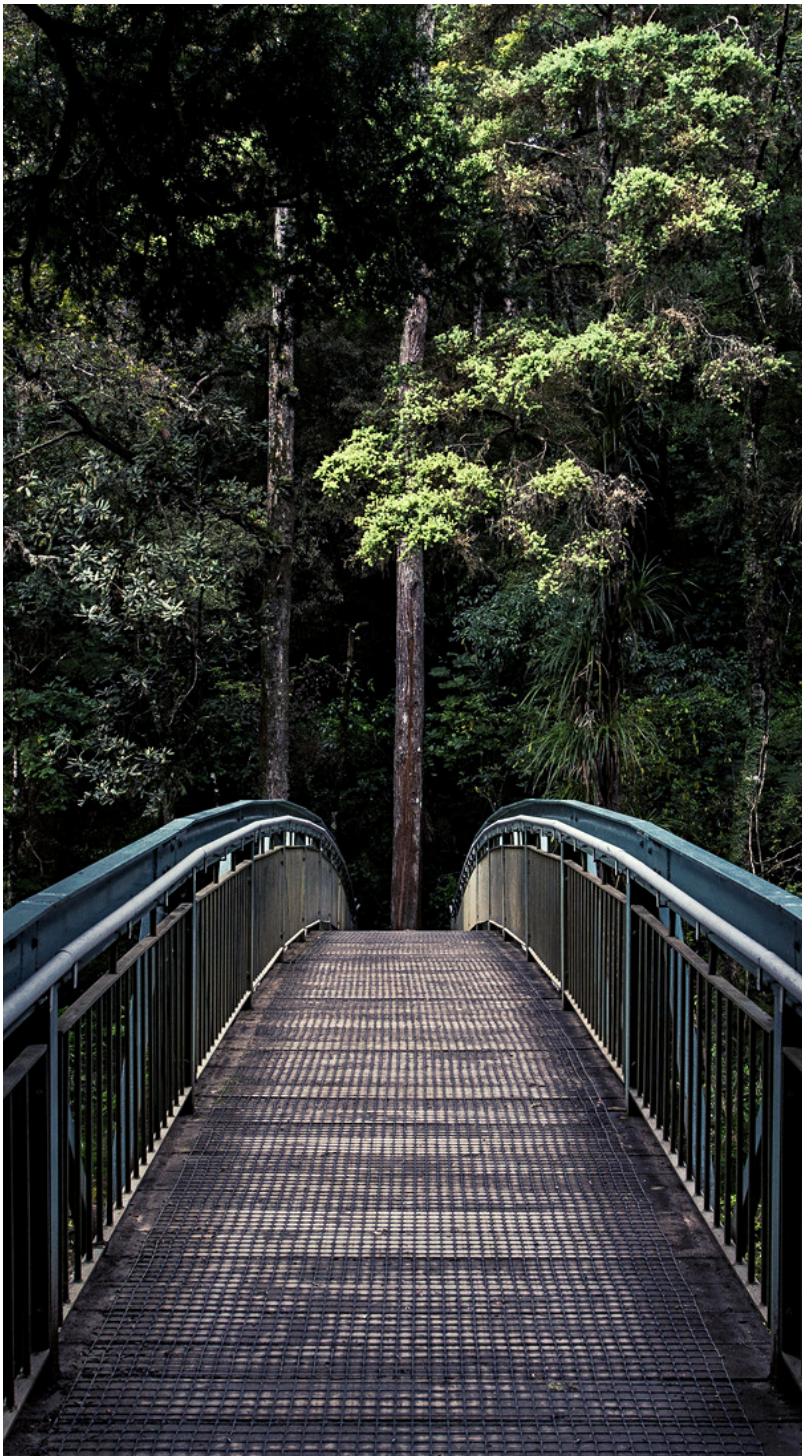
As the world of work continues to transition into the digital age, we are being asked to use an overwhelming amount of new systems. The irony is – that for the sake of efficiency – suppliers are being burdened with the inefficiency of operating multiple systems. Eaco’s Category Mappings functionality helps you take a step towards solving that problem.

Category Mappings helps you use Eaco as a central system that integrates and/or interacts with other systems. Categories are how the types of services you offer are classified and described. Category Mapping enables you to match the names of Eaco’s Categories with the names of the Categories (types of services) in other systems.

For example, Eaco has the category “Plumbing” whereas another system has the category “Plumber”. Category Mapping enables you to tell Eaco that those two categories mean exactly the same thing. Another example of a common category mapping is matching “Air-Conditioning & Heating” jobs with “HVAC Jobs”, and the list goes on.

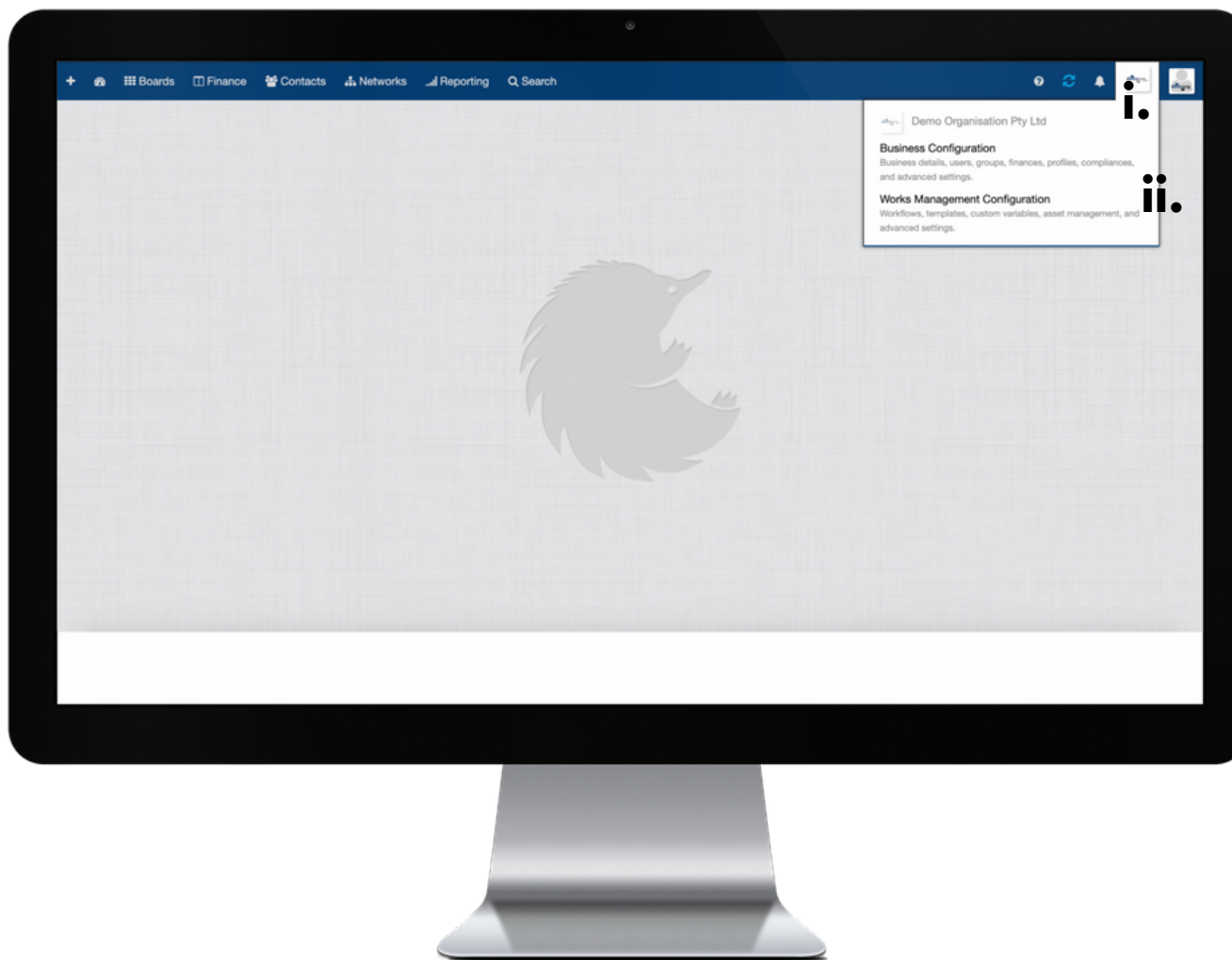
The power of Category Mapping comes then come into play when you use Eaco to automatically match and dispatch jobs out to staff and suppliers. Once Eaco automatically matches a job from an external system with an Eaco-defined category, it can then use its powerful Profile Matching system to match your local staff or suppliers with that job, at which point the job will be automatically sent to them. How easy is that!

#easydone



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# 1. GET STARTED

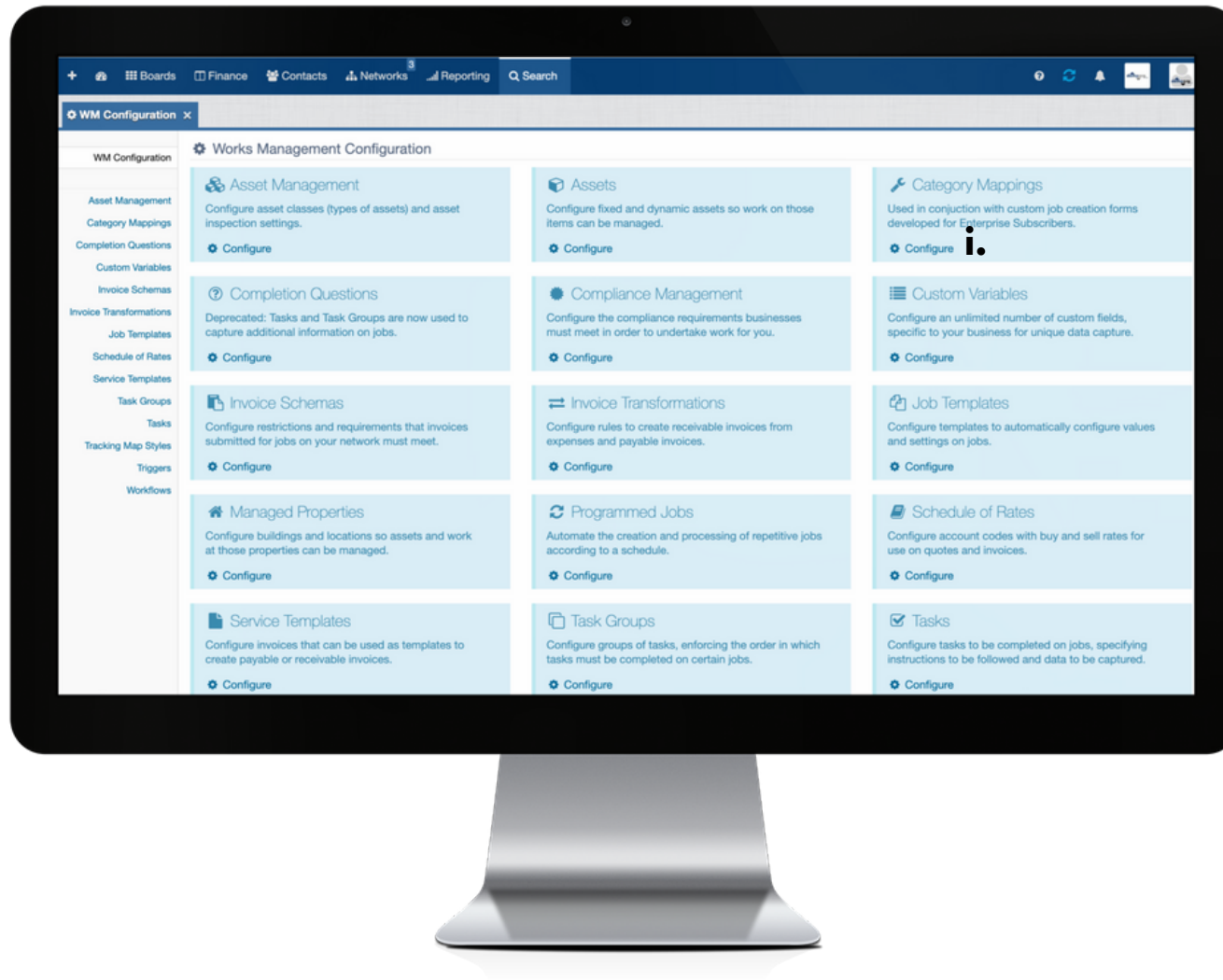


Establish the settings for your Category Mappings feature via your organisation's Works Management Configuration (WM Configuration) section.

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).

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## 2. WM CONFIGURATION



i: To commence establishing the settings for your Category Mappings feature, click on Configure.

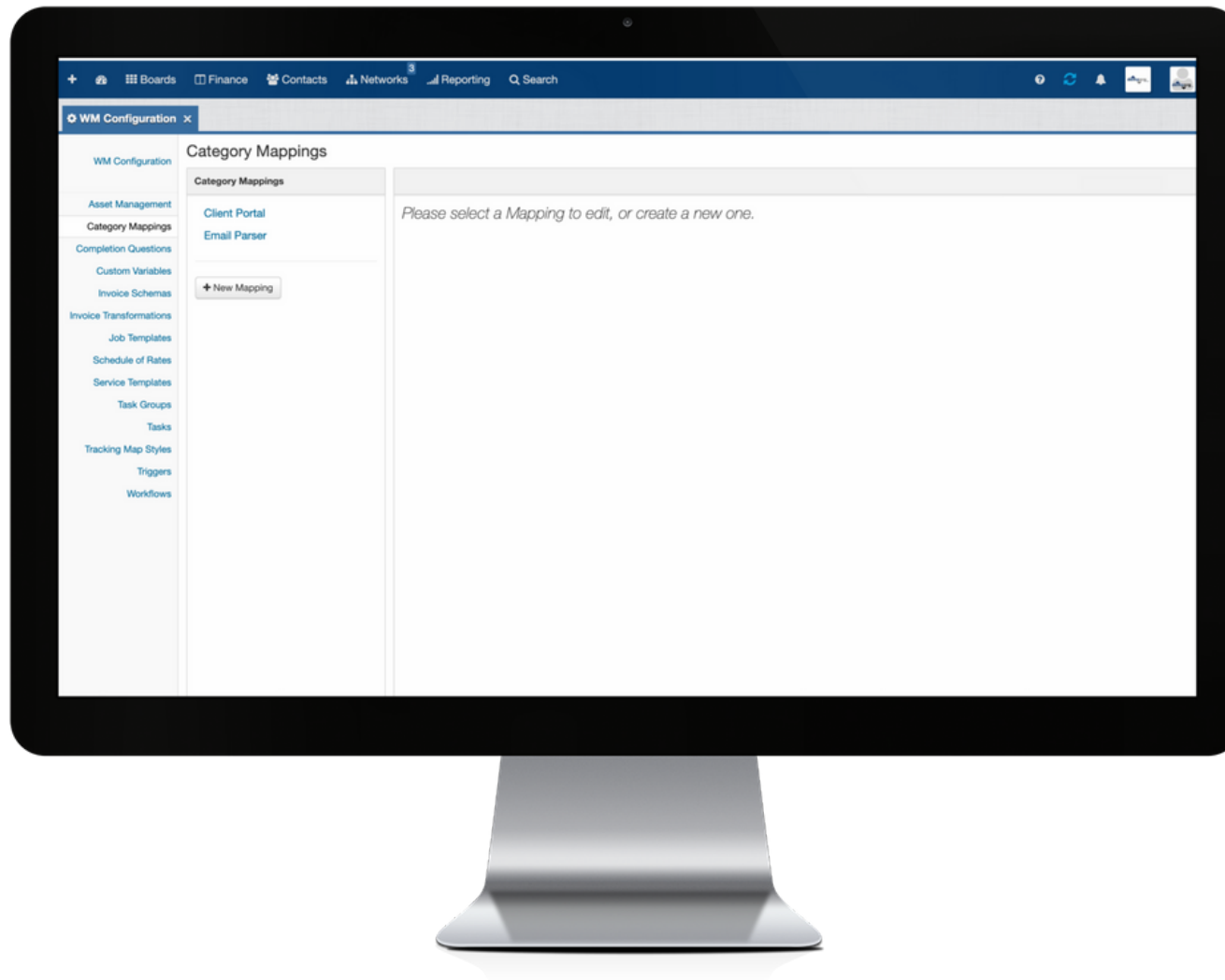
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## 3. SETTINGS: MAIN VIEW



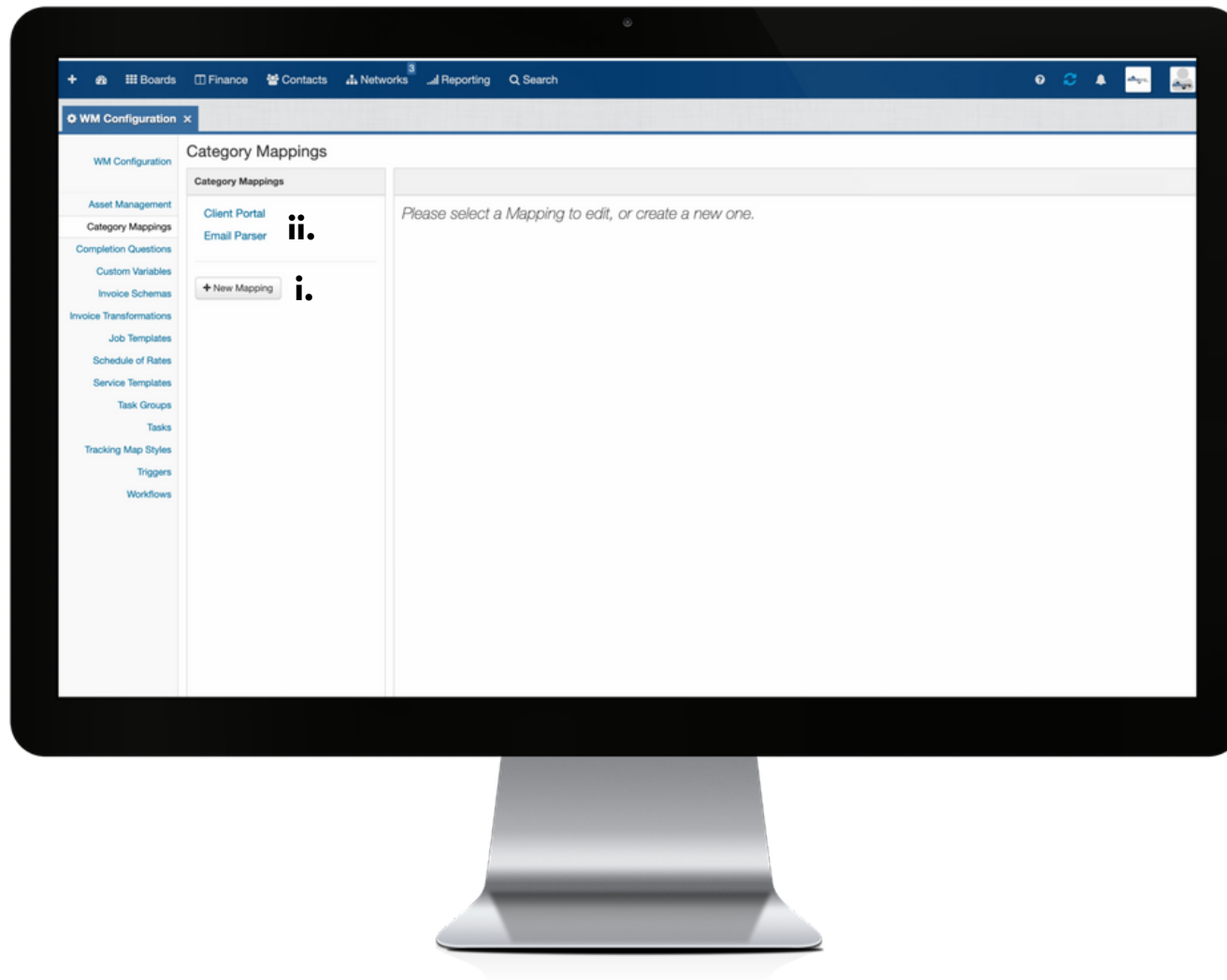




Configure settings to use Category Mappings in conjunction with customised “Post a Job” forms or Email Parsers, to map a customer’s job category in line with a defined job category.

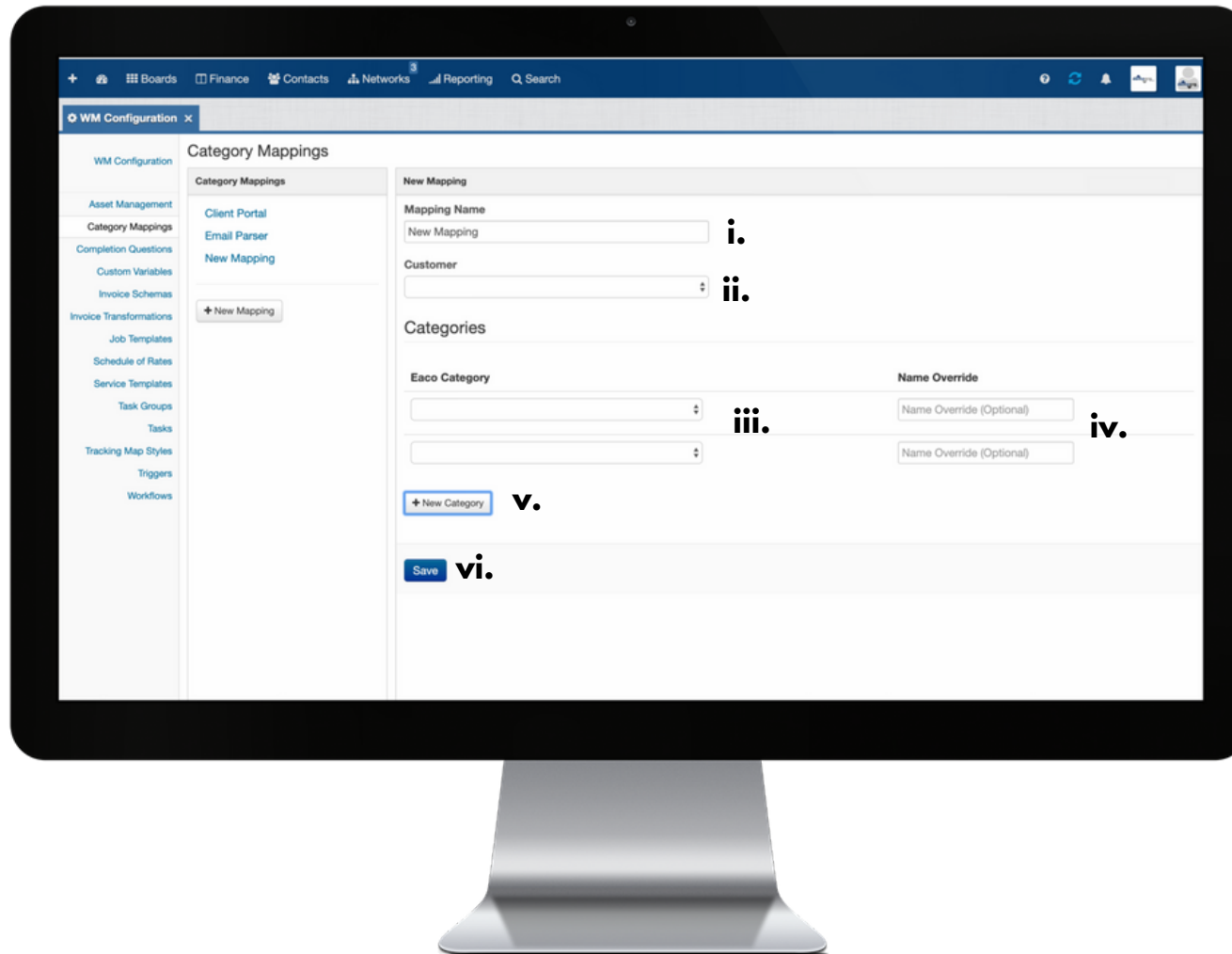
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# 4. ADD A NEW/EDIT A CATEGORY MAPPING ITEM



**i:** click +New Mapping to open the add Category Mapping dialog box;  
or

**ii:** to edit the details of an existing Category Mapping, click the name to open the Category Mapping dialog box.



**i:** complete this field to apply a Name for the Mapping.

**ii:** if applicable, use the drop down menu to select the Customer the Mapping is to attach to.

**iii:** use the drop down menu to select the applicable job category from the defined list of categories (e.g. Electricians > General Electrical).

**iv:** here, you have the option to map the defined job category name based on the language used by your clients/customers (e.g. Electrical).

**Example:** for General Electrical work, the job category name used by your client is Electrical. Therefore, in the instance where your client is posting a job and selects Electrical as the relevant category, Eaco will post the job to the correct defined job category, in this case, to the Electricians > General Electrical category.

**v:** to map the posting of jobs to more than one category, click +New Category to add more categories as required.

**vi:** click Save to confirm creation of the Category Mapping.



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# **5. EXAMPLE OF A CREATED CATEGORY MAPPING ITEM**

