



Eaco Job Form Wizard

USER GUIDE

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INTRODUCTION

"The secret of getting ahead is getting started" - Mark Twain

We turn up to work every day on a mission to make the world a better place. Together, we churn through work that (a) has to get done to make our society function; and (b) creates the things we need for a better future. We break up this work into well defined morsels, and we call each, a "job".

Job by job we make the world a better place. And it all starts with "Posting a Job". Eaco enables you to Post a Job either (a) programatically, where you capture job information from other sources such as work orders; APIs; and emails; or (b) by manually entering the data into Eaco. For purposes of this User Guide, we will focus on (b) posting a job into Eaco, manually.

Posting a Job manually into Eaco can be as simple or as complex as you need it to be. With a click of the +icon (top left hand corner in your Control Centre), the Job Form Wizard will pop up, revealing two options:

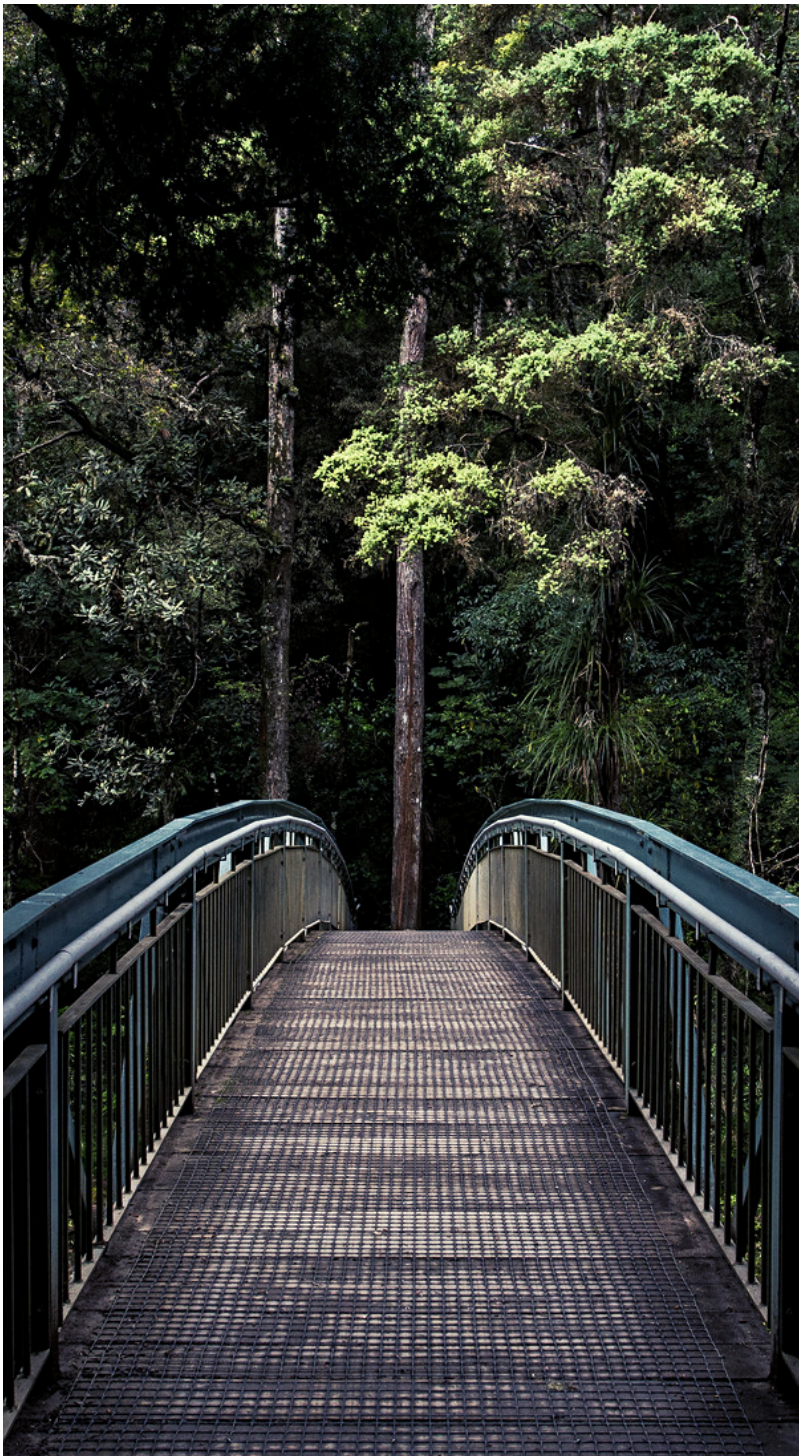
1. Stand Alone Option: the tab dedicated to "Add a Job to Eaco", is where the journey of getting things done (in-house) starts. If you have a job to be completed, manage it through Eaco by filling out the Add a Job to Eaco form.

Or

2. Collaborative Option: the tab dedicated to "Post to Supplier Network" is where the magic of bridging it all together to make life easier for all stakeholders happens. Take advantage of Eaco's Job Matching technology to automatically match and dispatch your job.

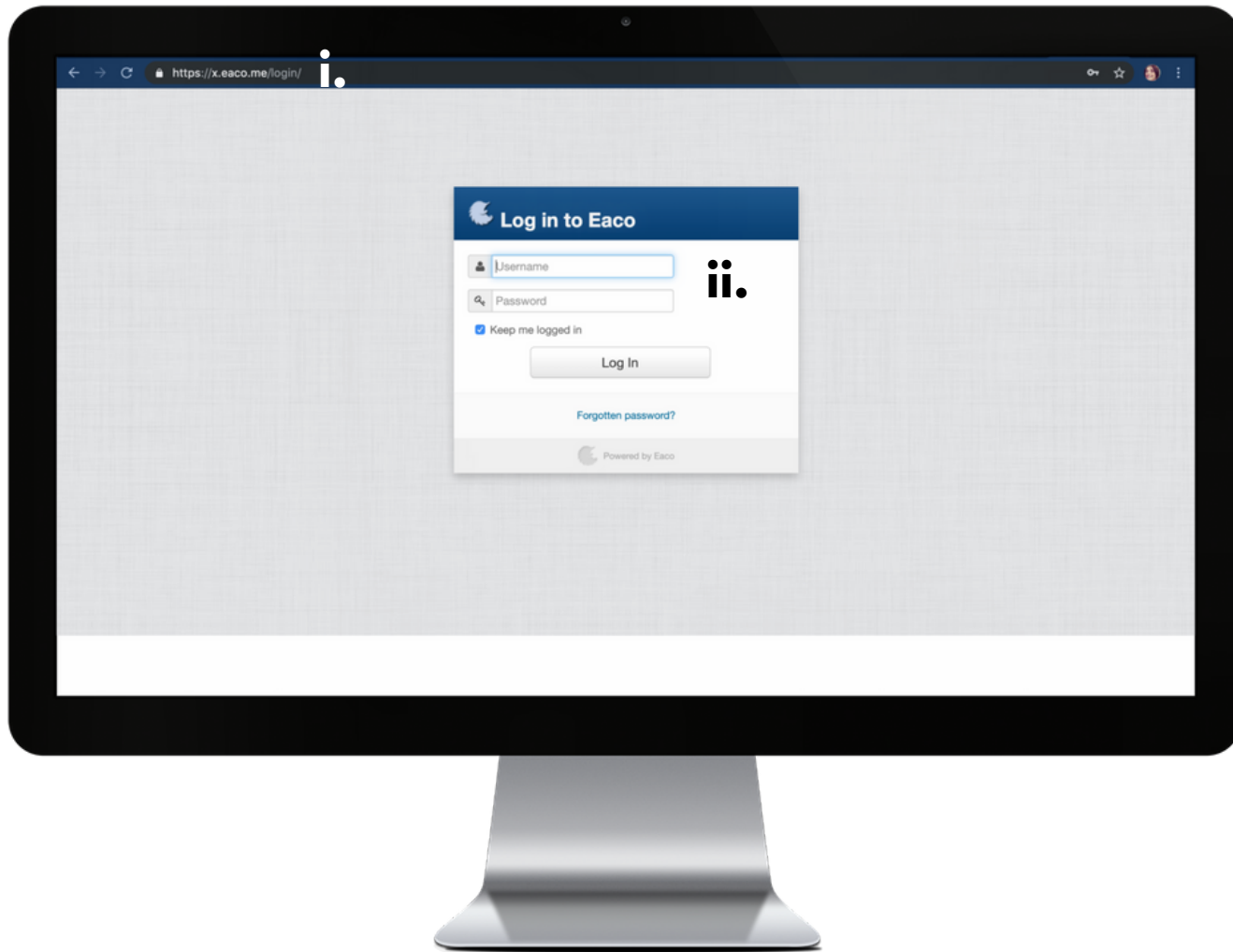
But wait...there's more! To help you capture the data you want on every Job, you can add or remove fields on the Job Wizard Form by clicking on the cog (settings icon) on the tip right hand side of the Form. This little trick gives you access to extra fields such as Workflow templates, Tags, Managed Property selection, Assignee, and Eaco's extremely powerful Job Template option which automagically enters relevant data for each job (i.e. sets each job to the right Workflow, Managed Property, Tags, etc). Are you ready? Are you Set?

#gowitheaco



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1. GET STARTED



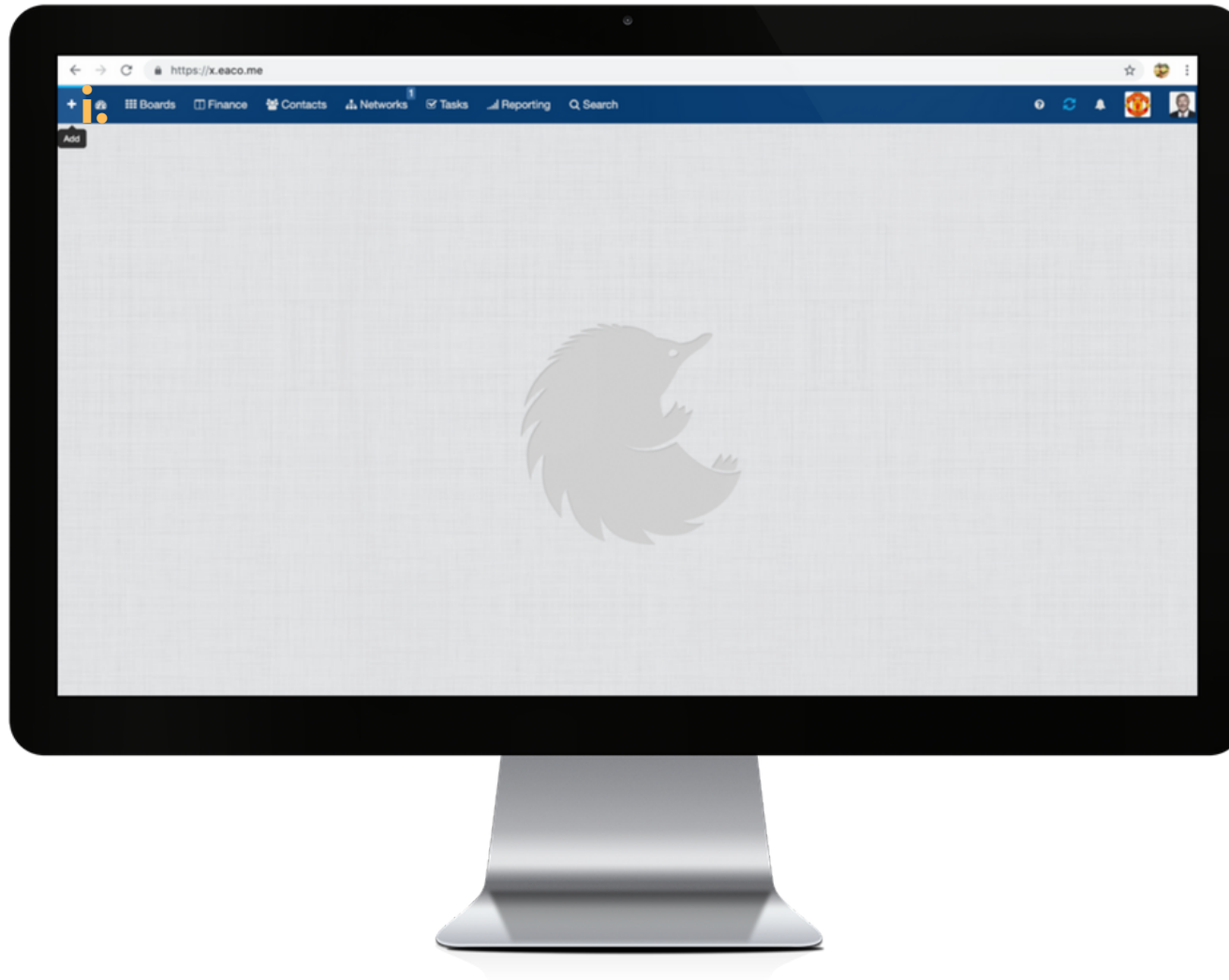
- i. Login to your Instance on Eaco at <https://x.eaco.me/login/>.
- ii. Complete the Username and Password field and click Log In to enter.

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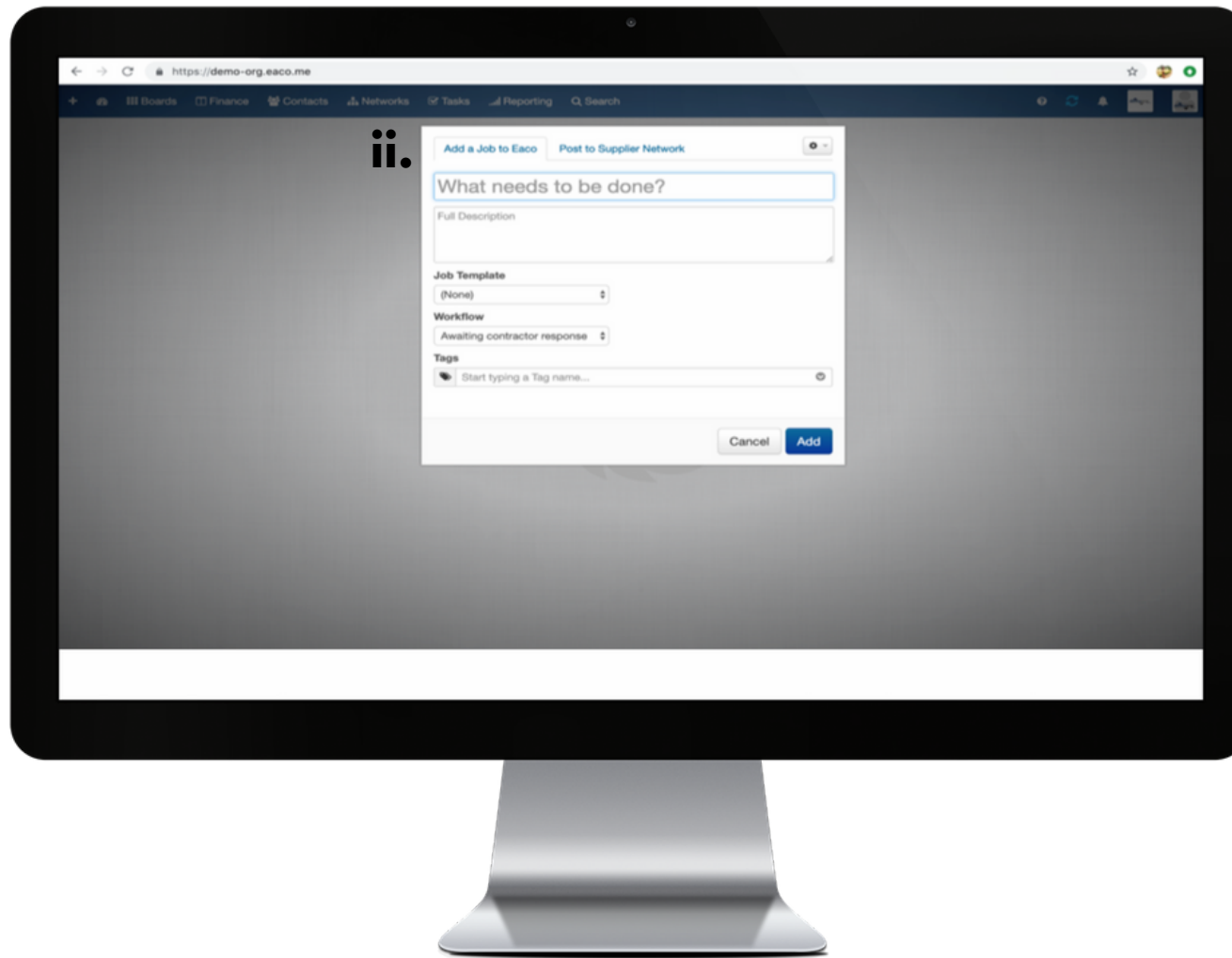


2. POST A JOB CREATION





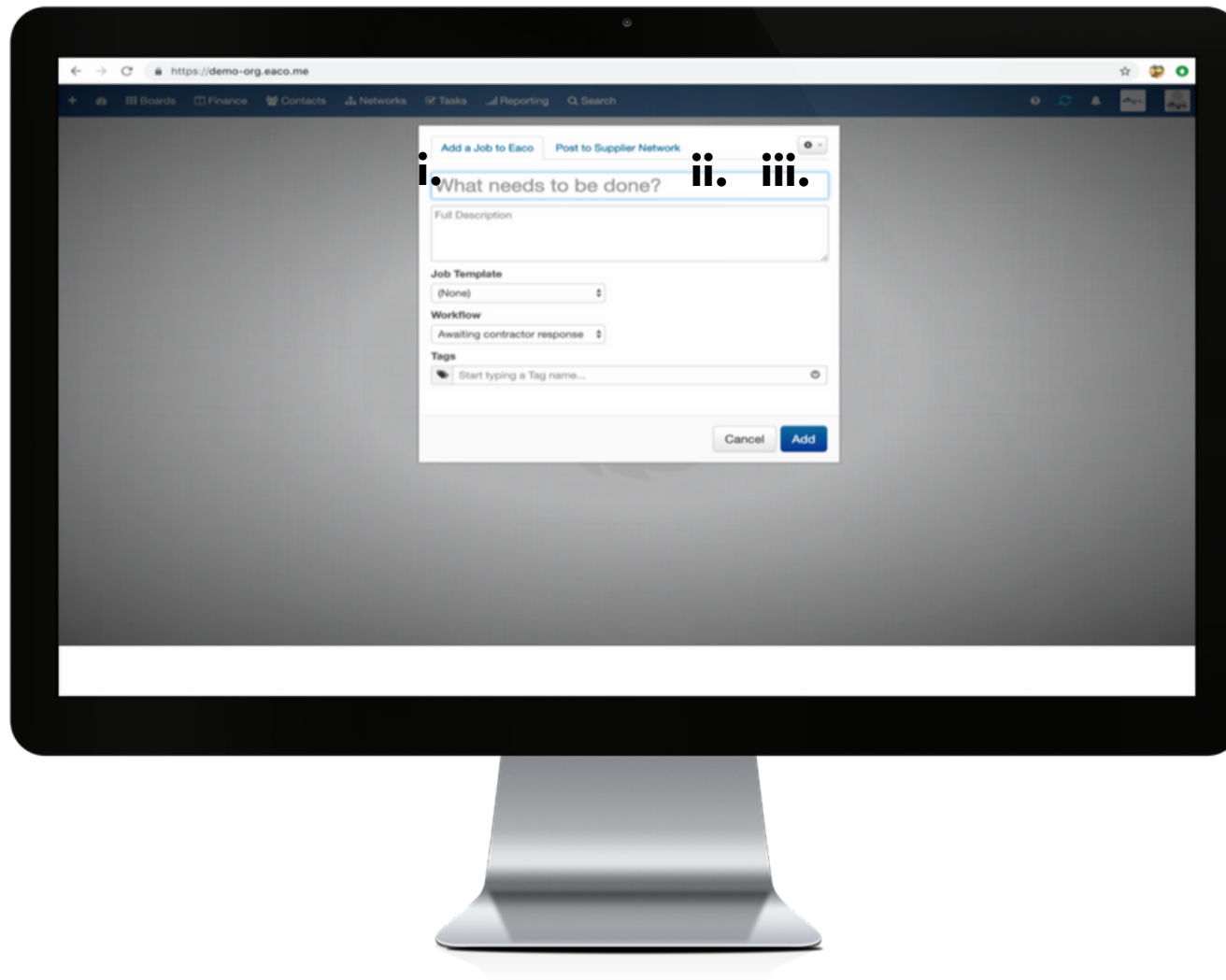
i: In the dark blue Eaco toolbar at the top of your screen, locate the +icon in the far-left hand corner.



ii: Upon clicking the +icon (Add), the Job Form wizard will open. To commence creating a job, you will first need to select from the two tabs to ensure your job is posted to the right department.

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3. POST A JOB



i. Add a Job to Eaco: select this tab if you wish to post an "in-house" job to be managed through Eaco.

ii. Post to Supplier Network: select this tab if you wish to post a job to your Supplier Network or a Self-delivery Job (i.e to be performed from within your internal network).

iii. The Eaco Job Form consists of default fields depending on the form layout you apply in Settings (click the cog icon).

Job Form Settings

Title/What needs to be done?: Use this setting to attach a title/brief description for the job.

Reference ID: use this setting to attach a Reference ID to the job.

Full Description: use this setting to provide a full description of the job to be done.

Job Template: use the Job Template setting to select the template applicable to the job you are posting. A Job Template can be created in Eaco to enable pre-fill defaults for the Job Form. A Job template applies settings on the management and accounting information for each job or client type to a job or client type for a job and this may include some settings that Users may not have permission to set themselves.

Workflow: use the Workflow setting to select the Workflow template applicable to the job you are posting. Workflow templates can be created in Eaco to enable tracking on the progress of a job as it moves from stage to stage.

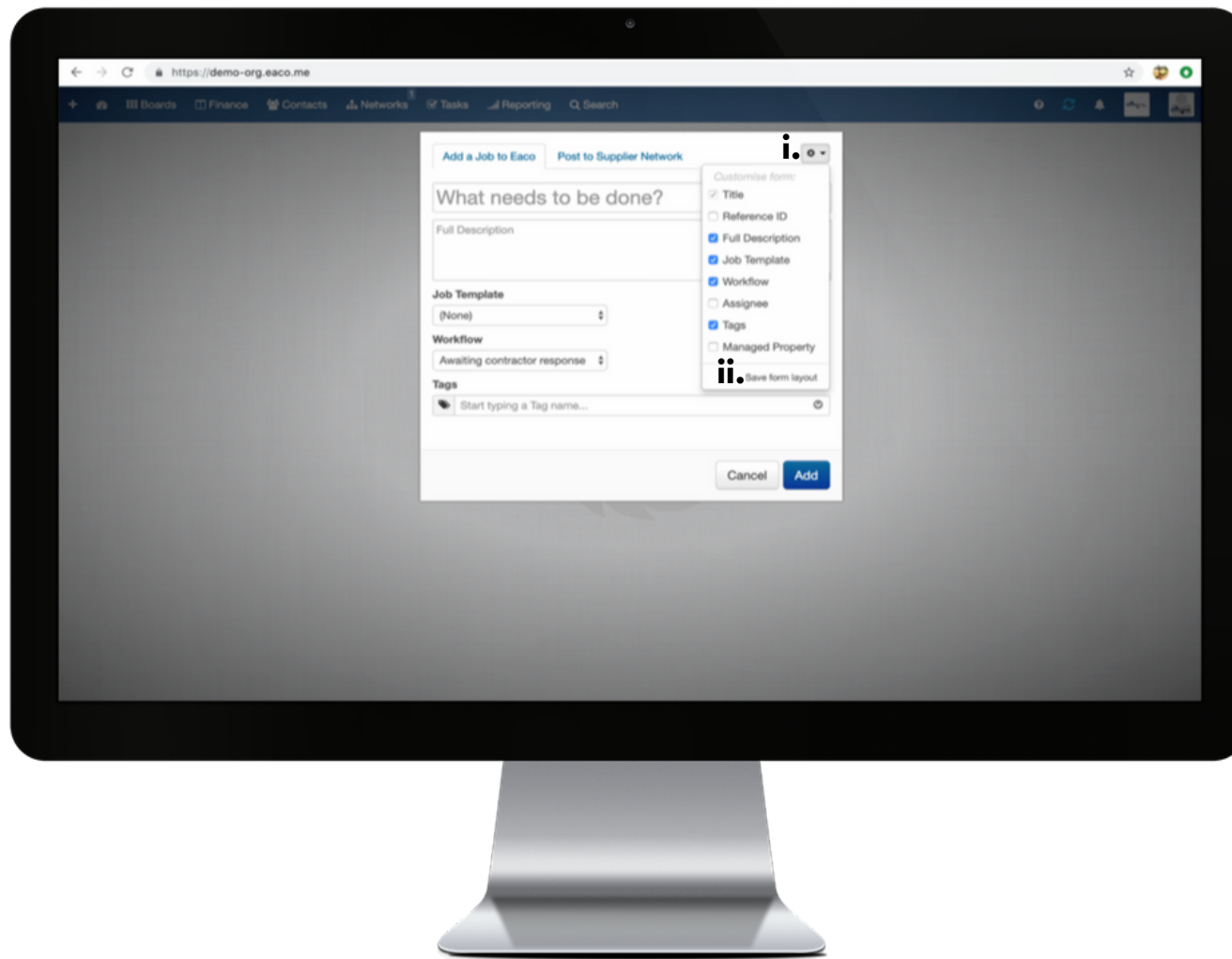
Assignee: use this setting to assign a User to the job.

Tags: use this setting to attach applicable (#) descriptions to the job.

Managed Property: use this setting to attach the details of the Managed Property of which the job is to be associated. Eaco enables you to create a register of properties for which work is performed at and the assets work is performed on.

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4. APPLY YOUR JOB FORM SETTINGS



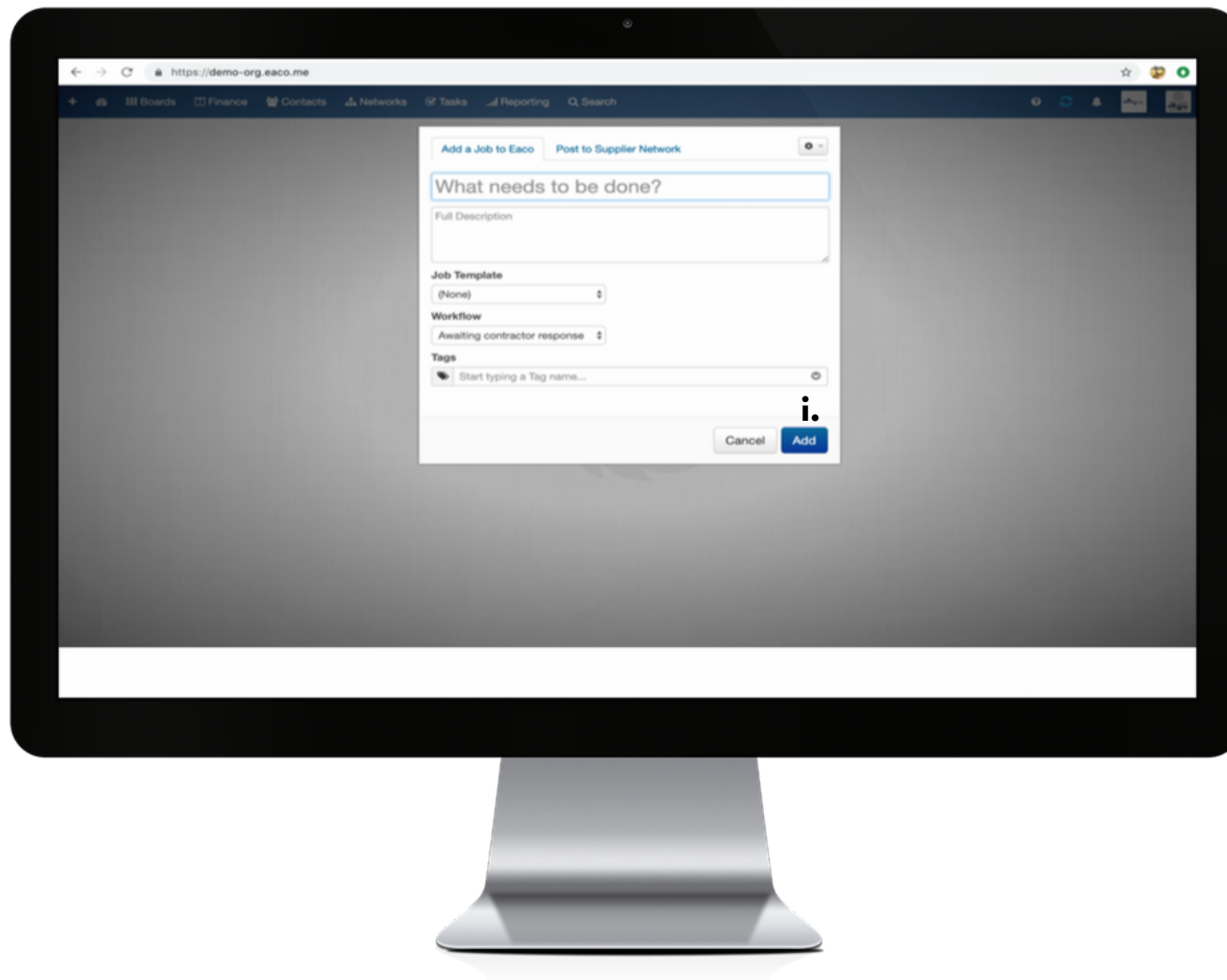
- i:** To select your desired Job Form fields, click the Settings icon located in the right-hand corner of the Job Form wizard and check the applicable fields.
- ii:** If you wish to retain your Settings selections for the posting of future jobs, click on “Save form layout” located in the bottom right-hand corner of the Settings menu.
- To return to the Job Form, click away from the Settings menu.

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5. POPULATE THE JOB FORM TO ADD A JOB TO EACO





i: Supply the details of the job to be performed by populating the Job Form fields, then click the Add button, which is located in the bottom right-hand corner.

Note: the Job Form fields to be completed will be based on selected Settings, however, the number of fields in your Job Form will depend on the Settings you choose to apply in the process of posting a job.

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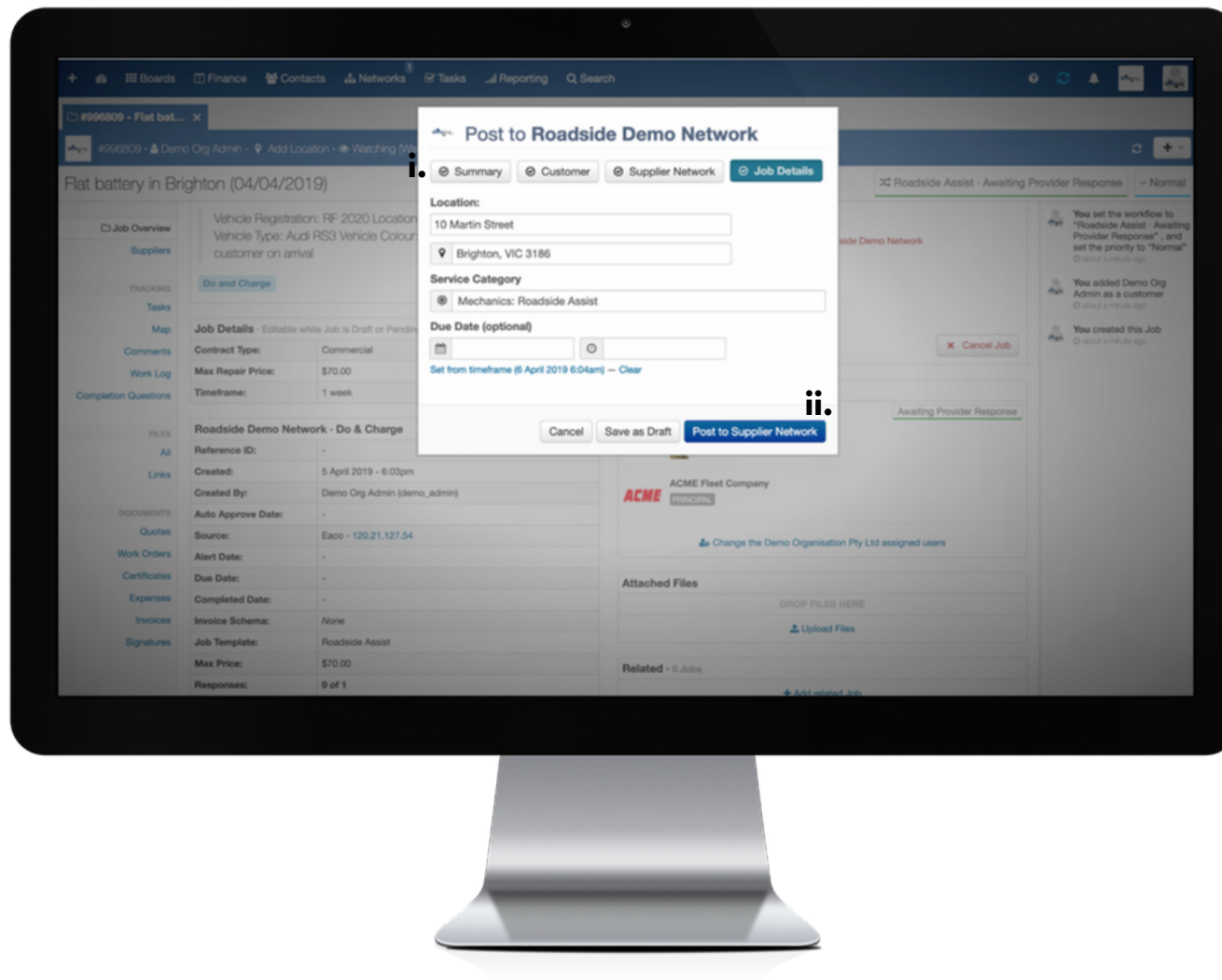
6. POPULATE THE JOB FORM TO POST TO SUPPLIER NETWORK



The screenshot shows a web browser window with the URL <https://demo-org.eaco.me>. The browser's top navigation bar includes links for Boards, Finance, Contacts, Networks, Tasks, and Reporting, along with a search icon. The main content area displays a job form titled "Flat battery in Brighton (04/04/2019)". The form is divided into several sections: "Supplier Network" (Roadside Demo), "Job Template" (Roadside Assist), "Workflow" (Awaiting Provider Response), "Assignee" (Roy Keane), and "Tags" (Do and Charge). At the bottom right of the form, there is a "Next" button with a right-pointing arrow. A small information icon (i) is located to the left of the "Next" button.

i: Supply the details of the job to be performed by populating the Job Form fields as per the example in this image, then click the Next button, which is located in the bottom right-hand corner.

Note: the Job Form fields to be completed will be based on selected Settings, however, the number of fields in your Job Form will depend on the Settings you choose to apply in the process of posting a job.

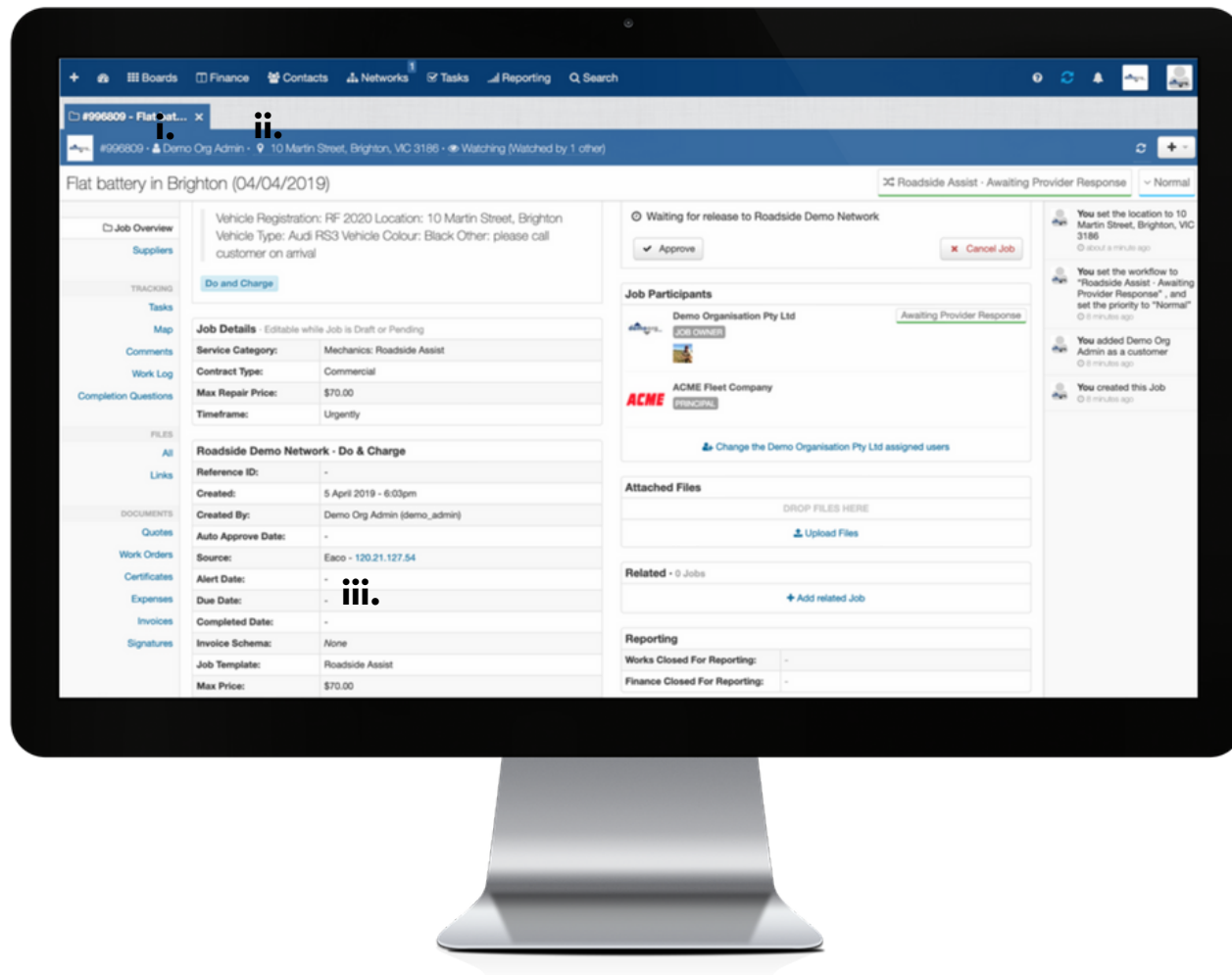


i: Once all four tabs – **Summary, Customer, Supplier Network, Job Details** – of the Job Form have been completed to your satisfaction, you are now ready to post your job to your Supplier Network.

ii: To post your job, click the Post to Supplier Network button.

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7. REVIEW YOUR JOB



Upon clicking the Add button (for Add a Job to Eaco option) or the Post to Supplier Network button, your Job Overview will display. This will enable you to identify elements requiring further completion and/or give you the opportunity to amend aspects as you see fit such as the examples marked in this image:

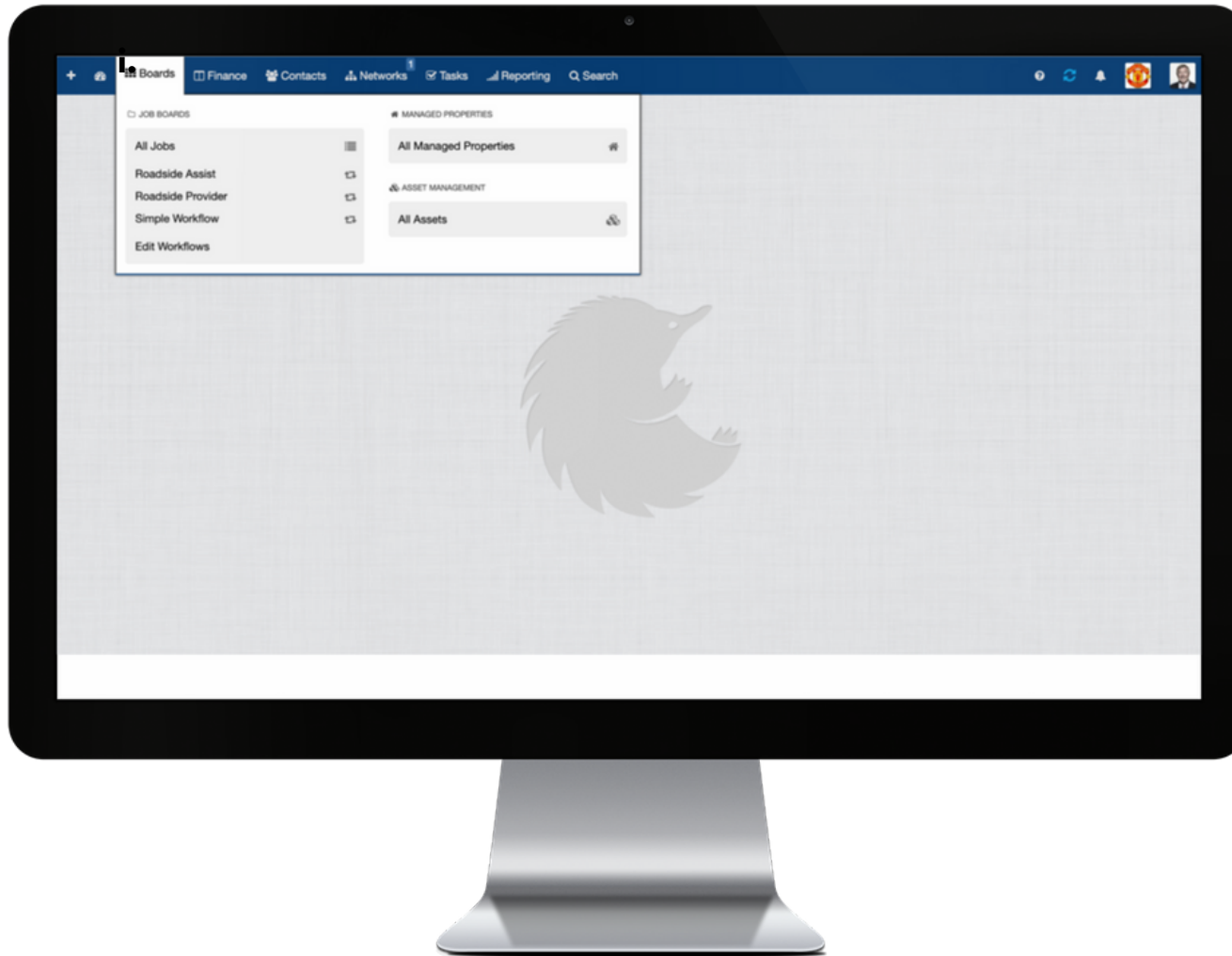
i: Click here to Add/Change Customer details.

ii: Click here to Add/Change Location details.

iii. Click this editable field to schedule a Due Date. Repeat this step should you wish to amend/update any of the other editable fields within the Job Overview screen.

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8. RETRIEVE YOUR JOB



i: Your posted job can be retrieved at any time from within the Eaco Boards menu as per the image above and the image on the following page (Page 23).

All Jobs						
#996809	Flat battery in Brighton (04/04/2019)	Roadside Assist	Demo Org	Pending	Brighton, VIC 3186	5-Apr-19 6:03pm
#996674	Roadside in Great Western (Friday 05/04/19)	Roadside Assist	Jane Smith 0438 529 800	Pending	Great Western, VIC 3374	5-Apr-19 1:50pm
#996389	test for Sonia	Car Batteries	Roy 0403 438 411	Pending	Brighton, VIC 3186	4-Apr-19 9:32pm
#996388	test for Sonia	No Category	Roy 0403 438 411	Cancelled	No Location	4-Apr-19 9:19pm
#996385	test for Sonia	No Category	Roy 0403 438 411	Cancelled	No Location	4-Apr-19 9:13pm
#996381	test for Sonia	Car Batteries	Roy 0403 438 411	Open	Brighton, VIC 3186	4-Apr-19 8:37pm
#994914	Roadside in Great Western (Tues 02/04/19) - 3	Roadside Assist	Jane Smith 0438 529 800	Closed	Great Western, VIC 3374	2-Apr-19 11:52am
#994912	Roadside in Great Western (Tues 02/04/19) - 2	Roadside Assist	Jane Smith		Great Western, VIC	2-Apr-19