nicenstripy crm



The CRM has been designed to help you manage customers, work and to generate quotes. It also has reporting functions to help you review your business performance.

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Dashboard

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Customer Name Quote Number Status Quote Expiry Date Approve Quote Weston, Staun QU-0004 Drait Sunday 071eb 2816 Approve Quote
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On entering the CRM, you will arrive at your dashboard, this is your home screen with an overview of **Recent Enquiries, Appointments, Scheduled Work** and **Recent Quotes.**

My Enquiries

Any customers found in the 'My Enquiries' section will have come from the nicenstripy website. If you click the 'New Customer' button in this section, you will be directed to a screen to add a new customer, once saved, this customer will be listed as a New Enquiry in your customer database rather than an Active Customer.

My Appointments

The 'My Appointments' section shows the next 10 appointments in your diary from the current date forward. From this section you can add a new appointment through clicking the 'Add Appointment' button. Edit an appointment by clicking the appointment Title and records the Outcome of an appointment. If the tick is clicked, an appointment is marked as successful and will be recorded on the weekly return as a presentation. If the cross is clicked, you are presented with two options, you can either delete the appointment or re-schedule the appointment for a future date.

This Weeks Work

The 'his Weeks Work' by default shows the work scheduled for the current date, it also allows you to quickly scroll through past (yesterday) and future work (tomorrow, this week and next week). You can also access your Work Sheets using the 'View Work Sheets' button. Clicking the edit item (pencil over paper) you can edit the work item or clicking the cross allows you to delete the scheduled work item. Finally, if you click on the customer's name you are taken to the customer overview page for that customer.

My Recent Quotes

The 'My Recent Quotes' section lists recent quotes which are either in 'Draft' or 'Quote Sent' status. Within this section you can create a new quote through clicking the 'New Quote' button, view all

quotes by clicking the 'All Quotes' button, view and edit a quote clicking the customer name or the quote number and finally, approve a quote by clicking the 'approve quote' link.

My Work

Schedule Work

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	Vier/Print Scheduled Work				, oke	nat (py years notifing and name					

The 'my work' home screen allows you to quickly view your scheduled work selecting the relevant links. From this screen there are also buttons to Schedule Work, View Work Sheets and View/Print Scheduled Work. You can also search for a customer from this screen.

Under the listed work you are able to view the customer over view for a selected customer through clicking their name, edit a work item or delete a work item.

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	Schedule Work						
	Select Customer						
	Customer Hext						
	Search via Sumame or Company Name to find your customers						
	Finish						
			nicenstripy, grass cutting and more				

If you click the 'Schedule Work' button, you are initially asked to select a customer, you can search your customer database through entering the customer surname or company name. Once two

characters have been entered potential customers are shown in a list, as more characters are entered this list becomes shorter. To distinguish between customers with the same name, their post code is also shown.

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		nicenstripy, grass cutting and more	

Select your customer and click 'Next'. You are then taken to screen showing the customer information to ensure you have the correct customer. You are also presented with a number of boxes to complete, the Date of the First Visit, you can assign the work to a Van and the Services information. To reduce the volume of admin, the main services offered by nicenstripy have been pre-loaded onto the system for you.

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Dashboard	Work - Quotes Appointments - Custo	mers - Reports - Chemical	Records	Documents Resources - Forum Settings			
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Address 1:	19 stan well road	Week 2: One Off Jab:	Label				
Address 2:		Initial Cost:	Laber				
Tewn:	penath	Customer Type:	Domestic				
County:	vale of glam	Work Type:		Maintenance			
Post Code:	CF64 2EZ	Value Per Visit:	611.39				
Email:	shaun-test@ttple-test.co.uk	Preferred Payment		N/A			
Website:		Date of First Visit:		Tue 12 January 2016			
Telephone:	02920 706336	Date of Last Visit:		Fri 15 January 2016			
Mobile:							
Select Servic	e to Schedule						
Date of first sch	eduled visit						
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Saved Service(s)							
Please Select a	Saved Service ~						
Service	Description Frequency' Qua	ntity Unit Price VAT Job N	otes				
		NO VAT ~		Schedule Work			
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This value is use	d when scheduling work.						
Finish							

Should you attempt to schedule work on or before the current date, you are presented with a warning message that the date for the work has passed. Simply click 'Yes' if you are happy to schedule the work or 'No' to clear the error message.

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javascript_doPostBack(ctI005ContentPlaceHolder3LinkEuttonNo)					elcenstripy, grass cutting and mare						

When scheduling work, there are two key fields **Frequency** and **Quantity**, depending on the values in these boxes the system will schedule the service to match the number in the quantity box at intervals dictated by the frequency box. So a weekly grass cut would have a frequency of 7 and a default value of 30 for the quantity to cover a full season, the system then adds a weekly grass cut for this customer 30 times every week from the start date specified (date of first scheduled visit). It is possible to edit each job individually if required.

Information entered in the 'Job Notes' field is intended for the worksheet and will be recorded against each job.

Once a job has been scheduled a confirmation message will appear and all editable fields will be reset for the next work item.

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	Telephone:	02920 706336	Date of Last Visit:		Fri 15 January 2016						
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	Grass Cut we	ekly scheduled successfully									
	Finish										

To exit the Schedule Work screen, click the 'Finish' button or simply navigate away.

It is also possible to access the Schedule Work screen from a customer page, this will take you directly to the screen to schedule work for your chosen customer rather than having to search for the customer.

Work Sheet

You can navigate to the work sheet from the 'View Work Sheet' button on your dashboard and my work overview section or using the dropdown navigation.

The Work Sheet works on fortnightly blocks, showing the current week and next week, you can cycle through each day by selecting the appropriate day and date, click 'Next Week' or 'This Week' to cycle between weeks. The day that the work is being shown for will appear in bold.

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	Van	Weather		
	Satact Van - 	No record found for this date Weather: Temperature High: Temperature Low: Record Westher		
			nicenstripy, grass cutting and more	

On this screen you can also view and edit the mileage for each van for that day and also record the weather conditions, the weather conditions will feed into your weekly return.

To edit either item, simply click the 'Edit Van Details' or 'Record Weather' button, complete the relevant fields and click Save

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			nicentripy, grass cutting and more	

From this screen it is also possible to 'Edit the Order of Work' for that day, click the link and you are presented with an 'Order of Work' column, simply number the jobs in the order you want them to be completed, the lowest coming first and the highest number being last and save. It is possible to save just that day's work or all future work sheets through clicking the appropriate button.

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On the work sheet, besides every job there is an option to 'Complete Job', select this to complete the job. Once a job has been completed the status of the that work is recorded on the system and shows on the Work Sheet, this will be 'Work Done' or 'Work Incomplete' to reflect the outcome of the work. If a job wasn't completed the system asks for a reason to be recorded and it is possible to access this through clicking the customer name. When completing a job, you are taken through a series of questions, '**Did you visit the site?' Did you Complete the Job?** If no is selected for either of these, the user is asked to record the reason for not completing the work and this is recorded on the system.

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Penarth CF64 782 Did you visit the site?	Payment: N/A							
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If a job is completed and the service was listed as Domestic Maintenance or Commercial Maintenance you are asked to complete the commercial works sheet. The data recorded under Commercial Works can be viewed for each customer and a history of the services undertaken viewed for each day. The system will also show you the time spent and the revenue per man hour taken to complete the work.

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Complete Job Customer Job Details Carip, Jon Servise: Connectal Multitesance Stawvik Rod Description: Connectal Multitesance Motes: Motes: Parath Parath Post Parath Commercial Works Record Sheet Number of Men Adspired to Job: Anthor of Men Adspired to Job: Arrival Time: Provides Orgited Aduan Feed Iskew Up Clear Leaves Clear Leaves Clear Leaves Job Completed Keys Used! (Mayou seed to use customer keys to complete the work? (Neuve Mark! (I no keys used) Keys Out; Keys Used! (Mayou seed to use customer keys to complete the work? (Neuve Mark! (I no keys used) Keys Out; Keys Used! (Mayou seed to use customer keys to complete the work? (Neuve Mark! (I no keys used) Keys Out; Keys Out;	C , ms sql get date only from datetime	+ 合 自 🛡 🖡 😁		
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For any other service you are simply asked to record the basic information

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Click Save to complete a job.

View/Print Scheduled Work

Finally, under the work section it is possible to view and print all scheduled work for your chosen date range. Simply use the date picker controls (click in the box and it should appear) and click 'Search'

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	Print Work								
	Please select a date range to see all completed work within your chosen date range.								
	Start: Friday 01 January 2016 End: Sunday 31 January 2016 Search		Print						
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A list of all the work in your chosen date range will appear organised by date. Click the 'Print' button to print off the results.

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	Name Rhys, Tuckwood	PostCode CF40 2UR	Service Lawn Feed Autumn	Price £100.00	Vat £20.00	Total £120.00	Work Date Tue #5 Jan 16					
	Rhys, Tadowood	CF40 ZUR	Jet Washing	£190.00	620.00	E120.00	Wed 06 Jan 16					
	Rhys, Tackwood	CF40 2UR	Garden Tidy Up	£100.00	£20.00	£120.00	Thu 07 Jan 16					
	Rhys, Tadovood	CF40 2UR	Commercial Maintenance	£0.00	£0.00	60.00	Thu 37 Jan 16					
	Rhys, Tackwood	CF40 2UR	Fending	£180.00	620.00	£120.00	Fri 08 Jan 16					
	Rhys, Tuckwood	CF40 2UR	Conmercial Maintenance	£0.00	£0.00	£0.00	Fri 08 Jan 16					
	Rhys, Tuckwood	CF40 2UR	Domestic Maintenance	£0.00	£0.00	60.00	Fri 08 Jan 16					
	Shaun, Weston	CF64 2EZ	Domestic Maintenance	£25.00	£5.00	£30.00	Tue 12 Jan 16					
	John, Camp	CF64 2EY	Grass Cut one Off	£10.00	62.00	£12.00	Tue 12 Jan 16					
	John, Camp	CF64 2EY	Grass Cut one Off	£10.00	62.00	£12.00	Wed 13 Jan 16					
	John, Camp	CF64 2EY	Grass Cut one Off	£10.00	62.00	£12,00	Thu 14 Jan 16					
	Tong Pitter	CF64 2EZ	Garden Tidy Up	£10,00	£2.00	£12.00	Fri 15 Jan 16					
	Shaun, Weston	CF64 2EZ	Gutter Clearing	60.00	£0.00	£0.00	Fri 15 Jan 16					
	John, Camp	CF64 2EY	Conmercial Maintenance	£137.00	£27.40	£164.40	Fri 15 Jan 16					
	Tony, Pitter	CF64 2EZ	Garden Tidy Up	E10.00	£2.00	£12.00	Sat 16 Jan 16					
	John, Camp	CF64 2EY	Grass Cut one Off	E10.00	£2.00	£12.00	Sat 16 Jan 16					
	John, Camp	CF64 2EY	Grass Cut one Off	610.00	£2.00	£12.00	Sun 17 Jan 16					
	Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	62.00	£12.00	Sun 17 Jan 16					
	Tony, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Mon 18 Jan 16					
	Tong, Pitter	CF64 2EZ	Garden Tidy Up	£18.00	£2.00	£12.00	Tue 19 Jan 16					
	Tong, Pitter	CF64 2EZ	Garden 71dy Up	£19,00	£2.00	£12.00	Wed 20 Jan 16					
	Tong, Pitter	CF64 2EZ	Garden Tidy Up	£18,00	£2.00	£12.00	Thu 21 Jan 16					
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Edit Work

If you choose to edit a job, you will be presented with all future related work items.

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The system will allow you to edit an individual item or all related items.

Delete Work

If you choose to delete a work item you are presented with two options, to delete all future related work or the single item.

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	Dashboard Work - Quotes Appoint	ments + Customers + Reports + Chemical Records D	ocuments Resources - Forum Settings	
	Work Items			
	Delete Work Item You have chosen to delete the scheduled work Once you delete this Item you will not be able Are you sure you want to delete this Item?			
	please tick to delete at future retards wo please tick to car firm defector wo	Related Work Item(s)	Customer Details	

Quotes

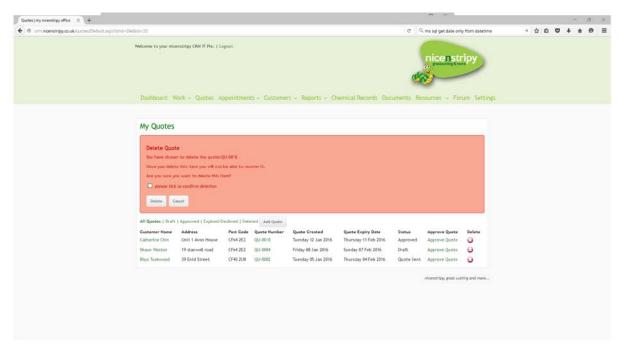
The 'My Quotes' section shows a quick overview of your quotes and allows you to filter by status, a quote status can be 'Draft', 'Quote Sent', 'Approved' or 'Removed', quotes can also show under the expired/declined tab where the expiry date has passed.

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		Approved Expired/E	udlead 1 Dale	ted and the									
	Customer Name Catherine Chin	Address Unit 1 Avon House		Quote Number QU-0010	Quote Created Tuesday 12 Jan 2016	Quote Expiry Date Thursday 11 Feb 2016	Status Approved	Approve Quote	Delete				
	Shaun Weston Rhys Tuckwood	19 stanwell road 39 Enid Street	CF64 2EZ CF40 2UR	QU-0094 QU-0092	Friday 08 Jan 2016 Tuesday 05 Jan 2016	Sunday 07 Feb 2016 Thursday 04 Feb 2016	Draft	Approve Quote Approve Quote	0				
								nicenstripy, grass cut	tins and more				

From this screen it is possible to Add a New Quote by clicking the 'Add Quote' button, view and edit the quote by clicking a client name or quote number, approve a quote or delete a quote.

If you select to Approve a Quote, the system redirects you to the 'Schedule Work' (see P.5) to schedule work for the customer linked to the quote.

If you select to delete a quote a warning is presented asking you to confirm the quote deletion.



To delete a quote, tick the tick box and click 'Delete' the quote is then moved to your deleted pile.

To add a new quote, click the 'Add Quote' button. At first you are asked to select your customer, (the customer search works as detailed on page 5), the system will import todays date and set the expiry for 30 days from today's date. The quote number is automated and will simply be the next number based on the total number of quotes created on the system. The reference field is a free text field and you can enter anything you want.

Click the 'Next' button.

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New Quote										
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Weston, Stephen (CF40 2	Thursday 14 January 2014 Saturday 13 February 20	1 QU-0011		Heat						

On the next screen you will then see a template to create your quote.

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	Once you have added everything to your Quote, click Send Quote' to proceed to the next stage where you can review your o quote. Or click Save as Draft' If you glan on editing the Quote late:	quote before either printing o	Save Cancel					
	Sever as Deaft	Print Out	te Email Quote					

Complete the template to create your quote and click the 'Save' button to save the quote. Cancel will return you to the quotes page without saving. 'Save as Draft' will save the quote as a draft and return you to the quotes overview page.

Once you're happy with your quote you can either print the quote to deliver or send in the post or you can email the quote to the customer using the 'Email Quote'.

If you choose to Email the Quote, the system will pre-load the customers email if available but this can be manually entered, it will also preload a subject and an email with the customer's details which can be edited. It also loads your details which can be configured in the settings section.

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Once a quote has been emailed, you will be redirected to a success screen confirming the email was sent.

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Success	
Nour quote (QU-4011) has been successfully sent to Stephen Weston Return to Mr. Quotes	
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My Appointments

The 'my appointments' section gives you an overview of your appointments.

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	Add Appointment Title Gardening Maintenance Garden Maintenance	Customer Name Weston, Stiphen Chin, Catherine	Address 1 21 Enid Street Unit 1 Avon House	Town Tonypandy Pen <i>a</i> rth	PostCode CP40 2UF CF64 2EZ	Appointment 18 January 16 @ 09:30 14 January 16 @ 12:00	Outcome ✓ X ✓ X					
						niceratripy, gra	as rutting and more					

From this screen you can Add an Appointment, view/edit an appointment through clicking the appointment title, view a customer through clicking their name, mark the outcome of the appointment as successful which is then recorded as a presentation on the weekly return or delete an appointment.

If you choose to delete the appointment the system will ask you to confirm that you want to delete the appointment, but will also present you with the option of editing the appointment should you need to re-schedule the appointment.

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	Appointment Title	Gardening Maletenanc		Appointment Titles are used in the email reminder sent to outcomers			
		I 3 January 2016 ⊕ 9 - 430 Customer Name Weston, Stephen	Save Appositumer Address 21 End Street, Tonypandy, CF40 20F	Appointment Mon 18 Jan 16 @ 09:30			

To delete the appointment tick the tick box and click the 'Delete' button.

If a quote is marked as success through clicking the tick next to the appointment. If the appointment was linked to a customer, the system will update your weekly return to include a successful presentation and will then redirect you to the quote page to complete a quote for that customer. See Page 13 for quotes.

Add Appointment

It is possible to add customer appointments and non-customer appointments to the system, when you click 'Add Appointment' you are first asked if the appointment relates to a customer.

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If it does, change the radio button to yes and you will be presented with the customer search box (page 5) or an option to add a new customer.

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Add New Customer under new appointment screen shot

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	Appointment Title	Appointment Titles are used in the email reminder sent to customers	
	Appointment Notes		
	Send email reminder?		
	Schedule Appointment		
	Appointment Date and Time:		
	My Appointments		
	No Appointments Found within 7 days of your chosen date		
	My Work Schedule		
	No Scheduled Work Found within 7 days of your chosen date		

Complete the relevant appointment information and select the appointment date, the system will show you the scheduled work and any appointments within the next seven days once a date has been entered, each time you change the date the system will also refresh your future appointments and work schedule. Enter a time using a 24-hour clock to complete the appointment.

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			eleenshipy, grass cutting and me	· · · ·

If your appointment is for a customer meeting, you can also opt to send an automated email to the customer reminding them of the appointment 24-48 hours before the meeting. It is important to note that if you opt to use this feature the appointment title along with the date and time will be sent to the customer. If you have not entered an email address the system will flag this up for you. You can edit the customer later to make use of the email reminder feature.

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Email Appointment Reminders

Every 24 hours, the system will check for any appointments due within the next 48 hours and send an email reminder, the email will automatically insert the customer's name, appointment title, date and time of appointment along with your contact details should the customer wish to rearrange the appointment.



Dear Geraint Jones,

This is a quick reminder of your scheduled appointment with Geraint Rhys-Jones of nicenstripy on Thursday 14 January 2016 at 09:30 to discuss Garden Maintenance.

We hope this is still convenient for you, however if it is not, please contact Geraint Rhys-Jones on 029 2070 6336 / 07764740081 or email geraint.jones@itpie.co.uk.

Many thanks and we look forward to seeing you soon.

Regards

nicenstripy team

please note this is an automated email. Please do not reply

If the system finds an invalid or missing email address it will email you to notify you that it wasn't able to send a reminder to the customer.



Hi Geraint Rhys-Jones,

We weren't able to remind Catherine Chin about your appointment on Thursday 14 January 2016 at 12:00 as the email address entered was invalid.

You can either contact the customer on the phone number found on the system (02920 706336 or 07718 057 920) to confirm your appointment or update their email address and the system will try again.

This is an automated email, please do not reply.

Kind Regards

nicenstripy team

Customers

The customer overview section allows you to quickly view your customers divided under three headings, 'Active Customers', 'Recent Enquiries' and 'Past Customers'. Active Customers are those who you currently do work for, Past Customers are customers you have worked for but no longer do work for and Recent Enquiries are customers you have added or who have come through the website but aren't actual customers.

From this screen you can search your customers, add new customers or edit existing customers.

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Add Customers

When adding a customer, you are asked to complete as many fields as possible, but the only required field is 'Company/Surname'

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Customer Overview

When you view a customer, all the information linked to their account is shown under various tabs. To view any of this information simply click a tab.

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	Website:		Date of Last Visit:	Fri 08 January 20	15				
	Telephone:	01443 000 000							
	Mobile:	00000 000 000							
	Edit Customer								
	Notes								
	Add / Edit Hotes								
	Photos								
	Upfoad Images								

On the Customer Overview page it is possible to edit the customer information, Add/Edit notes linked to the customer, Upload Images for the customer, Schedule Work for the Customer, Update the Customer Status and Archive the Customer.

Implementary

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If you choose to archive a customer you are presented with a warning.

As explained, archiving a customer will remove them entirely from your CRM.

Future Work

Future Work presents all future work for this customer and allows you to edit and delete the work.

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Past Work

Past Work shows all past work and its status following completion of the Work Sheet

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Chemical Records

Chemical Records shows the most recent recorded information for each type of chemical record and allows you to view all historical data by each customer.

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Commercial Works

The Commercial Works section shows an overview of each entry for commercial works, the summery presents the date of the work, arrival and departure time, hours worked, men on the job and total hours worked. The job value and the revenue per man hour. The system also calculates the total value and man hours for all commercial works under this customer giving you the average revenue per man hour.

To view what commercial works were entered onto the system on completion click the 'View Info.' Button.

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Quotes

Quotes shows and allows you to edit quotes linked to the customer. To edit a quote, simply click the Quote Number.

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Reports

Under the reports tab you can see the most recent weekly returns and the most recent Commercial Works.

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Weekly Returns

It is possible to add a new weekly return or edit an existing weekly return from here.

If you choose to add or edit a weekly return the system pre-populates as much information as possible based on data recorded on the system via appointments and work sheets.

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	Total Income	60.00	60.00	60.00	60.00	60.03	60.00	60.00	60.00								
	Value (net)	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00								
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	Revenue Per Van (net)	60.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00								
	No. of Staff Working	0	0	o	0	0	0	0	0	1							
	Revenue per staff member (net)	60.00	60.00	60.00	£0.00	£0.00	£0.00	£0.00	60.00								
	Weather																
	Temperature High	N/A	N/A	10		N/A	N/A	N/A									
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The Finance section is the sum of all completed work for each day.

If Vans have been associated with work their total is included under resources, but you will need to include the number of staff worked each day.

The weather data is pulled from the work sheet.

Marketing shows the sum of all successful appointments/presentations associated with customers but you will need to enter the cards delivered.

Commercial Works

If you navigate to the Commercial Works tab from the navigation bar you will see the most recent commercial works completed for each customer along with the total revenue, hours and average revenue per man hour for the commercial work shown.

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Total	al Job Revenue (Net): £271.17 al Man Hours: 29.08 rage Revenue Per Man Hour (N	let): £9.32													
	tomer Name Date of Job or, Tony Wod (9 Doc 15		Departure Time	Men On Job	Hours Worked 4.00	Total Man Hours	Job Value (Net) £222.00	Revenue Per Man Hour (Net) 618.50							
Camp	ip, John Wed 69 Dec 15 kwood, Rhys Fri 08 Jan 16	13:00 1	7:00	2	4.00	8.00 7.25	£24.17 £0.00	£3.42 £0.40							
	ton, Shaun Mon 11 Jan 16		16:07	3	2.42 0.92	1.83	£25.00	£13.66							
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Select a customer to view all commercial work for that customer.

Settings

The settings tab is where you manage your information.

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	My Contact Details	My Services	
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	My Contact Details Manage your address and costact details for templated Items such as quotes and extonated emulta. If Pe geraint Joneu@itpie.co.uk		
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Under settings you can manage your contact details which is used on quotes and emails.

Add services beyond the already pre-programmed services found on the system to make scheduling work quicker.

Manage your team

Manage your Vans

My Details

Select Manage my Details and you can view and edit your details.

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My Services

Add services linked to your account which will then appear in the dropdown menu when scheduling work.

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	Frequency - Please enter the number of days between visits, a one off service visit be 1, a weekly visit would b	w Service 7 and a fortnightly visit would be 14.	
	This rules is used when scheduling work. Your Saved Services		
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Manage Users

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Add, delete and edit user roles. You can give access to staff, change their roles which dictates what access they have and also delete them from the system when needed.

My Vans

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Add Vans to your account which can then be associated with work and will populate your weekly return.