# Sales Connection Manual/Guide Documentation.

System Introduction  
Salesconnection system is a website that provides a system for companies to manage their companies and work flow.

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# Navigation Side Menu Bar.

Clicking on the top left side menu bar, displays many optional dropdown menus that act like a display directory tree. Clicking on the branches displays more pages or more branches.

(System Note: Branches are assigned by the 1.1 and 1.1.1 design, if an item is 1.1.1 it is under the branch of 1.1 vice versa 1.1.1.1 is under/inside 1.1.1.)

# 1.1 Business management Navigation

The Business management Navigation branch offers navigation to the Schedule Branch, Dashboard Branch, Site List page, Contact List page, Asset List page and Product/Services list Page. Clicking on the pages brings the user to the pages. Clicking on the branches opens out a dropdown to more page options.

## 1.1.1 Schedule Branch

The Schedule Branch contains the dropdown options to the Job Schedule page, Asset Schedule page, Job category Schedule page, Project Schedule page and List View page. Clicking on these pages in the dropdown brings the user to these pages.

### 1.1.1.1 Job Schedule Page

* In the Job Schedule, there is a calendar Widget In which in which the Allows the user how they would view it. The default Settings Daily shows a week of task.
* The user can Sort the Calendar Based on the filters Which are Pending Jobs, Overdue jobs, alerted and order by descending.
* Other Filters also include the jobs assigned to Departments, Access Type and User's Assigned. And allows the user to Favorite the Filters they commonly use.
* User can also Move the calendar to see the previous weeks and next week's calendar.
* Allows the User to Add new Jobs By clicking on the Blue Add icon on the bottom right.

### 1.1.1.2 Asset Schedule Page

* In the Asset Schedule, users will see the dates of when certain assets are scheduled for.
* Users can add Jobs on this page as well.

### 1.1.1.3 Job Category Schedule Page

* Job category functions similarly to Job schedule, but instead of displaying which staff is assigned to the job. It shows the Job category, and which dates the jobs fall on.
* Users cannot sort the job category to display which ones appears at the top.
* The user can add jobs on this page as well.

### 1.1.1.4 Project Schedule Page

* Project Schedule Firstly requires the user to sort by the customer associated, then select the project under the

### 1.1.1.5 List View Schedule Page

* List View is a Daily Calendar that displays the work scheduled and assigned for the day.

## 1.1.2 Dashboard Branch

The Dashboard Branch contains the dropdown option to the Job Page, Project page and the Digital Form Pages.

#### 1.1.2.1 Job Dashboard

* Job Dashboard displays jobs sorted by their categories.
* The user can create/add jobs on this page as well.

#### 1.1.2.2 Project Dashboard

* Project dashboard displays projects sorted by their categories.

#### 1.1.2.3 Digital Form Dashboard

* The digital Form Dashboard provides the option to pick 1 of the 7 templates and displays a dashboard of the Digital forms in the template.
* The Digital forms are sorted by category.

### 1.1.3 Site List Page

* The Site list holds a list of sites which could be a client, company, or customer.
* Users can add new Site(s) using the Add button.
* To view details of the site(s), click on the “open in new tab” button.

### 1.1.4 Contact List Page

* The Contact List holds the contact information of the clients, companies, and customers.
* Users can add new contacts by clicking on the “Create New Contact” button on the top right.
* Users can click on the View button action to display the details of the contact.

### 1.1.5 Asset List page

* The Asset List page stores a list of all the asset(s) in the system.
* Users can add new asset(s) to this page with the “Add Asset” button.
* Clicking on the “open in new tab” button displays more details about the asset.

### 1.1.6 Product/services List Page

* The Product/Services list page stores all the products and services in the system which is used for keeping track of products and Billing customers for invoices.
* Users can use the “add Button” to add new Product/Services
* Clicking on the “open in new tab” button displays more details about the asset.

## 1.2 Business Reports

Business reports help users keep track of all the system statuses, changes, and details. Users can filter the reports by many variables and sort them as well.

### 1.2.1 Job report

* Job report displays all the jobs depending on the filters set, by the default jobs are sorted simply by the job number.
* Users can click on the “open in new tab” to view the job details.

### 1.2.2 Job Update Report

* Job Update report focuses on the updates and changes made on the jobs.
* Changes like changing statuses will be shown on the list.
* Users can click on the “open in new tab” to view the job details.

### 1.2.3 Project report

* The project report displays all the projects depending on the filter set.
* Users can click on the “open in new tab” to view the project details.

### 1.2.4 Project Update Report

* Project update report focuses on the update and changes made on the projects.
* Changes and updates like changing statuses will be shown on the list.
* Users can click on the “open in new tab” to view the project details.

### 1.2.5 Asset Update Report

* Asset update report Displays a list of all the assets in the system.
* Main purpose of asset update report is to display all changes and actions relating to the asset such as attaching/assigning to a job, site, or client.

### 1.2.6 Asset History Report

### 1.2.7 Digital Form Report

* Digital form reports display all the digital forms created under one of the seven digital form templates.
* Users can pick which Digital form template they would like in the filter.
* Users can see the rating, status, ID, and customer in the report details.

### 1.2.8 Digital Form Update Report

* Digital Form update report displays the updates and changes made to the Digital forms such as changing the status or commenting on the digital form.

### 1.2.9 Digital Customer Feedback Form Report

* Digital Customer Feedback Form report allows the user to find the feedback left by the customer, the feedback could include the clients comments, rating and signatures.

## 1.3 Business Metrics

### 1.3.1 Metric Dashboard

* The metric Dashboard display charts and graph on the system data mainly to provide a simple and digestible analysis of the system.
* Some default metrics are total job completions in a month and new clients added into the system.
* Users can change the dashboard displayed by clicking on the dashboard drop down on the top left and select the dashboard template.
* This Page does not Allow the user to create Metrics. To create metric groups and metrics go to Metrics Dashboard Layout Settings

### 1.3.2 Customer Analytics

* Customer analytics displays a list of customers sorted by the customer number and can be filtered.

### 1.3.3 Project Analytics

* Project analytics display a list of projects sorted by the project number and can be filtered by settings.

### 1.3.4 Job Analytics

* Job analytics display a list of Jobs sorted by the job number and can be filtered by the settings.

### 1.3.5 Digital form analytics

* Digital form analytics display a list of Digital forms depending on the digital form template chosen and filters set.

## 1.4 Business map

### 1.4.1 Business travel

### 1.4.2 Overview

* The Overview page allows users too see the check-in details of other users and display the check-in location on a map.

### 1.4.3 Geolocation

## 1.5 HR Suite

### 1.5.1 Claims management

* In the Claims management page, admins and approve and look at the claims made by users and staffs.
* Claims such as fuel milage and food claims made by the users can be approved here.

### 1.5.2 Overtime management

### 1.5.3 Attendance List

* The attendance list allows admins to view the attendance, check-in and check-out dates and times.
* The attendance list helps track if a employee is present in their work site or if they are late.

### 1.5.4 Office Check-in Settings

* Office check-in settings contains the list of offices and locations users can check in to.
* Admins can assign which users can check-in into which offices and locations.
* Admins can Add new locations by using the “Add location” which presents a list of Site locations to add.

## 1.6 Reminder & Marketing Broadcast

### 1.6.1 Reminder Report

### 1.6.2 Marketing Report

### 1.6.3 Marketing campaign

## 1.7 Smart Scheduler

### 1.7.1 Project Asset Schedular

### 1.7.2 Project Smart Scheduler

### 1.7.3 Site Smart Scheduler

## 1.8 Company settings

### 1.8.1 Site Settings branch

#### 1.8.1.1 Site Status

* The Site status display all the Statuses for a Site
* Users can add, create, and remove possible statuses a Site can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.1.2 Site Category

* Site category page displays the possible categories a Site can have.
* Admins can add, edit, and remove the categories.

### 1.8.2 Project Settings

#### 1.8.2.1 Project category

* Project category page displays the possible categories a Project can have.
* Admins can add, edit, and remove the categories.

#### 1.8.2.2 Project Status

* The Project status display all the Statuses for a project
* Users can add, create, and remove possible statuses a project can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.2.3 Project Status Segmentation

* The Project Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain project category.

#### 1.8.2.4 Default Project Creation

* The default project creation is a feature that pops up w

#### 1.8.2.5 Project too Do List

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.3 Job Settings Branch

#### 1.8.3.1 Job Category

* Job category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.3.2 Job Status

* The job status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

(Example : A category “Shipment” would have the status “Waiting for delivery” or “Arrived”

#### 1.8.3.3 Job Status Segmentation

* The Job Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain job category.

#### 1.8.3.4 Job to Do List

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.4 Digital Form Settings Branch

#### 1.8.4.1 Manage Access

* The Manage Access Page allows Admins to manage user access to Digital forms.
* Admins can disable access of users or departments to be unable to use certain templates.

#### 1.8.4.2 Digital Form Category

* Digital Form category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.4.3 Digital Form Status

* The Digital Form status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.4.4 Digital Form Status Segmentation

* The Digital Form Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain job category.

#### 1.8.4.5 Digital Form Email Setting

* The Digital Form Email Setting allows admins to set Digital forms to automatically CC or BCC (Blind CC – Not Visible to the user as being CC mainly to hide and not display it as being CC’ed) email accounts.
* CC & BCC settings can be different depending on the Digital form Templates used and the account selected. Such as different CC emails for different users.

#### 1.8.4.6 Digital Form Email template Setting

* The Digital Form Email Template Setting allows the admin to change the template structure of the email depending on the Digital Form template.
* Each Digital Form Sub-Template in a Template can have different Email Templates.
* Email Templates could have special subject wording or text/information included in the content.

#### 1.8.4.7 Remote Signature Email Template Settings

#### 1.8.4.8 To do list Branch.

##### 1.8.4.8.1 Digital Form To do List.

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.5 Public Form Settings branch

#### 1.8.5.1 Public Form Category

* Public Form category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.5.2 Public Form Status

* The Public Form status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.5.3Public Form Status segmentation

* The Public Form Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain job category.

#### 1.8.5.4 Public Form Banner Settings

* The Public Form Banner Allows the users to design and create the header and footer for the public Forms.

#### 1.8.5.5 Public Form to Do List

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.6 Asset Settings branch

#### 1.8.6.1 Asset Category

* Asset category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.6.2 Asset Status

* The Asset status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.6.3 Asset Status Segmentation

* The Asset Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain Assets.

#### 1.8.6.4 Asset To Do List

* The To-Do List page allows users to set requirements before a status can be changed.
* Requirements such as having the user leave comments or actions before a status can be changed.

### 1.8.7 Product/Services Settings Branch

#### 1.8.7.1 UOM Settings branch

##### 1.8.7.1.1 UOM Flag

* The UOM Flag Page controls the Status flag of the Product UOMs
* UOM settings include Quantity, Unit Name, Unit Price, Discount, Tax and Notes which can either be set On or Off.
* The UOM settings effects what details are displayed in the Product/Services Section in the Digital Form.

##### 1.8.7.1.2 UOM Management

* UOM management allows the users to Add, Edit and Delete Unit of Measurements (UOM)
* Some UOM might include 5x, 10x and bulk amounts of products/Services.
* The main purpose of UOM is allow for Discount pricing for Bulk Amounts or Variations of the Product/Services

##### 1.8.7.1.3 UOM Import

* UOM import allows the user to import excel Files containing the details/data of UOM settings.
* Provides a method of Adding large amounts of UOM settings instead of creating individual settings at a time.

##### 1.8.7.1.4 UOM Bulk update

* UOM Bulk update allows the users to upload batches of updated settings in excel format.
* Example : If a user wants all 10x batch amounts to have a increased discount the user could format it in excel quickly and upload the changes to the system.

### 1.8.8 Comment Settings Branch

#### 1.8.8.1 Comment Category

* Comment category page displays the possible categories a Job can have.
* Admins can add, edit, and remove the categories.

#### 1.8.8.2 Comment Subcategory

* Comment Sub Category allows users to add Sub categories In the comments to further categories them for certain purposes depending on the system

#### 1.8.8.3 Comment Status

* The Comment status displays all the Statuses for a job.
* Users can add, create, and remove possible statuses a job can have.
* Status can have special settings to them such as status that can only be set by Admin users.

#### 1.8.8.4 Comment Category Segmentation

* The Comment Status segmentation allows the User to set which Statuses can be set depending on the category.
* Status Segmentation allows specific status to only be an option to be selected for a certain Comment category.

### 1.8.9 QR Code Setting Dashboard

* QR Code setting Dashboard allow the users to manage QR codes being used in the system

### 1.8.10 Automation Settings Branch

#### 1.8.10.1 Project Settings

* The Automation Project Settings page allows the user to set templates that are automatically generated when a Site is created.
* This provides a way to automate Project creation for sites if the user is repetitively creating sites and projects.
* Automated Projects can be set to use different project templates depending on the Site category.

#### 1.8.10.2 Job Settings

* Need Further clarification

### 1.8.11 Staff Settings branch

#### 1.8.11.1 Department/Team Settings

* Department/Team settings work like Staff Category Settings, allowing admins to create company departments such as Finance, HR, Delivery, Sales etc.
* Provides a way to categorize employees and staff in the System.

#### 1.8.11.2 Claims Category

* The Claims Category allows the admin to manage the categories claims can be made from.
* Some Claims categories include Fuel, Work Overtime, Car Mileage etc.

#### 1.8.11.3 Milage

* The Milage Settings Allows the Admins to manage the calculation of payout for the milage and distance traveled for the claims.
* Extra Mileage for buffer (km) holds the value of the buffer as distance traveled may not be accurate and acts as a buffer.

#### 1.8.11.4 Check-in Distance Settings

* Check-in Distance allows the admin to change how far a user can be from a location to Check-in into the location.
* Example: having 1000 Meter check-in allows the user to only check-in to a location only if they are in a 1000-meter radius.

#### 1.8.11.5 Information management

* Information management only has 2 settings, “Enable Sub Admin account holders to edit or delete Site/Project/Job/Digital Forms that they have view access on” and “remove Project Summary View from all Job Views.

#### 1.8.11.6 User Alarm Settings

* User Alarm settings allow admins to set alarm notifications depending on the Job category.
* Example: A job with the category “Emergency” would send alarm notifications to all users assigned.

### 1.8.12 Metrics Dashboard Layout Settings

* Metrics Dashboard layout settings allows the users to edit what Charts, graphs and visualizations that would like to have in their metric dashboards.
* Users can create “groups” which is a template of multiple charts, graphs and visualizations.
* Groups could have specific roles like charts and graphs only on financial details or another only on productivity of staff and employees.

## 1.9 Import Branch

### 1.9.1 Site Import

* Allows Users to Batch import large amounts of Site data.
* Import data and format is in Excel.

### 1.9.2 Project Import

* Allows Users to Batch import large amounts of Project data.
* Import data and format is in Excel.

### 1.9.3 Asset Import

* Allows Users to Batch import large amounts of Asset data.
* Import data and format is in Excel.

### 1.9.4 Contact Import

* Allows Users to Batch import large amounts of Contact data.
* Import data and format is in Excel.

### 1.9.5 Product/Services Import

* Allows Users to Batch import large amounts of Product/Services data.
* Import data and format is in Excel.

### 1.9.6 UOM Import

* Allows Users to Batch import large amounts of UOM data.
* Import data and format is in Excel.

### 1.9.7 Site Bulk Update

* Site Bulk update allows the users to upload batches of updated Details in excel format.

### 1.9.8 Project Bulk Update

* Site Bulk update allows the users to upload batches of updated Details in excel format.

### 1.9.9 Asset Bulk Update

* Asset Bulk update allows the users to upload batches of updated Details in excel format.

### 1.9.10 Product/Services Update

* Product/Services update allows the users to upload batches of updated Details in excel format.

### 1.9.11 UOM Bulk Update

* Site Bulk update allows the users to upload batches of updated Details in excel format.
* Example: If a user wants all 10x batch amounts to have a increased discount the user could format it in excel quickly and upload the changes to the system.

## 1.10 Template Settings branch

### 1.10.1 Site Templates

* Site Templates allow admins to change how and what is displayed in the Site Details page and Site information throughout the system.
* Templates have default and custom field settings which are variables that hold information. An example of a custom/default field is Phone number, dates, or email.
* Custom fields allow users to add any time of data they would like to have on a Site if the data type is supported. Some of these data types are Text, Text area, Number, Date, Date Time, Multiple Checkbox, Attachments and more.

### 1.10.2 Project Templates

* Project Templates allow admins to change how and what is displayed in the Project Details page and Project information throughout the system.
* Templates have default and custom field settings which are variables that hold information. An example of a custom/default field is Phone number, dates, or email.
* Custom fields allow users to add any time of data they would like to have on a Project if the data type is supported. Some of these data types are Text, Text area, Number, Date, Date Time, Multiple Checkbox, Attachments and more.
* Some project settings include

### 1.10.3 Job templates

* Job Templates allow admins to change how and what is displayed in the Job Details page and Job information throughout the system.
* Templates have default and custom field settings which are variables that hold information. An example of a custom/default field is Phone number, dates, or email.
* Custom fields allow users to add any time of data they would like to have on a Job if the data type is supported. Some of these data types are Text, Text area, Number, Date, Date Time, Multiple Checkbox, Attachments and more.
* Som project settings include

### 1.10.4 Asset Templates

* Asset Templates allow admins to change how and what is displayed in the Asset Details page and Asset information throughout the system.
* Templates have default and custom field settings which are variables that hold information. An example of a custom/default field is Phone number, dates, or email.
* Custom fields allow users to add any time of data they would like to have on a Asset if the data type is supported. Some of these data types are Text, Text area, Number, Date, Date Time, Multiple Checkbox, Attachments and more.
* Some project settings include

### 1.10.5 Digital Form Templates

#### 1.10.5.1 Digital Form Template Settings

* Asset Templates allow admins to change how and what is displayed in the Asset Details page and Asset information throughout the system.
* Templates have default and custom field settings which are variables that hold information. An example of a custom/default field is Phone number, dates, or email.
* Custom fields allow users to add any time of data they would like to have on a Asset if the data type is supported. Some of these data types are Text, Text area, Number, Date, Date Time, Multiple Checkbox, Attachments and more.

#### 1.10.5.2 PDF template Customization

* Pdf Template customization allows users to edit the Generated pdf from Digital Forms.
* PDF template allows users to edit how the pdf template would look like such as formatting where each data field goes, such as Text box, dates and Checklist on a certain row and column.
* PDF template takes variables and data fields from the associated job/Project/Client and The Digital form it is generated from.

#### 1.10.5.3 Header/Footer/Company info template Settings

* The Header/Footer/Company Info template allows admins to add, edit and remove new Header/Footer templates.
* Header/Footer templates are used for adding header/footers to PDFs when generating. 8-

#### 1.10.5.4 Header/Footer/Company info Access Settings

* Header/Footer/Company info Access settings allow admins to set which users have access to which header/Footer template options.
* The main purpose being to allow special or specific header/Footer templates like official management templates to be restricted to admin accounts.

#### 1.10.5.5 PDF Introduction and Appendix Settings

* PDF Introduction allows companies to place a Cover Page or Introduction page to their PDFs.

### 1.10.6 Public Form templates

* The Public Form templates allow users to change and edit the templates of Public Forms.
* Public Form template settings include enabling QR for the Job, Asset, Project, and Digital Forms. Other Settings include Customer creation and Field display controls.
* Some of these data fields include Headers, Text Area, Dates, and checklist.

### 1.10.7 contact templates

### 1.10.8 QR Code templates

* QR templates allow users to create QR codes.

### 1.10.9 Product/Services templates

* Product/Services templates allow users to add Fields to the product/services Templates such as a text, Checkbox, Date, or numbers.
* Example: Users could add a text Field to store Serial code or product promotion dates.

### 1.10.10 Reminder templates

* Reminder templates allow the user to add new types of reminders.
* Some of these reminders could have a conditional trigger which automatically send reminders when a specific condition is met.

## 1.11 User Management Branch

### 1.11.1 User List

* The user list displays all the users in the system, Sorted by user category.
* Admins can add new users using this page.
* Admins can delete, edit, and deactivate user accounts as well on this page.

### 1.11.2 Copy Account

* The copy Account page allows users to copy user settings and preferences onto a new account to easily duplicate the settings.
* Two additional optional settings exist which is “Assign/View Access Permission” and “User Account Customization Settings.”
* After turned on(ticked) Users can view the same jobs, projects, and customers as the account it was copied on. User Account Customization settings copies all the minor settings the account is and isn’t allowed to do.

### 1.11.3 User Account Customization

* The User Account Customization displays the Control settings (disabled/enabled) for a user. The UAC contains nearly 50 different control settings allowed to be changed for a user.
* Click on the edit button on a user, displays a pop-up which allows the user a slider to enable and disable user settings.
* The Pop-up also allows admins to change the user Access, Notification and Mobile-App Access Settings.
* Access Settings include Ability to View/Assign, Creation and Deletion Control. Creation control allows users to create new jobs and deletion control allows them to delete jobs.
* Notification settings change how notifications may be sent to the user such as email, mentions, assign and general notifications. Which could be set differently depending on if it is a Job, Project, Site, Asset or Digital Form.
* Mobile-App settings are the access Settings for the Mobile-App whether the user will have access to specific pages in their Mobile App.

### 1.11.4 Company Profile Settings

### 1.11.5 Check Pending Update

* Check Pending Update allows admins to force a connection to a user’s account to detect any pending changes stored in the users account.
* The system Allows users to be able to access and perform actions with the system offline, but changes are stored locally and will not be sent to the system until an internet connection is later made. This page allows admins to attempt to connect to the users locally stored change to upload to the system.

### 1.11.6 Invite User

* The Invite Users page allows admins to add new users from this page as well. Its whole purpose is to just allow admins to add new users.

### 1.11.7 User Import

* User Import allows admins to import large amounts of users using an excel format template. Allows admin to upload up to 100 users at a time.

# 2.0 System Terminology and uses.