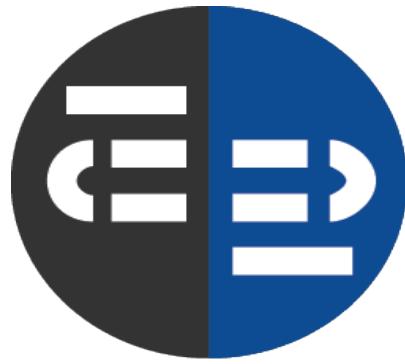


# **Electric Ease—User Guide**



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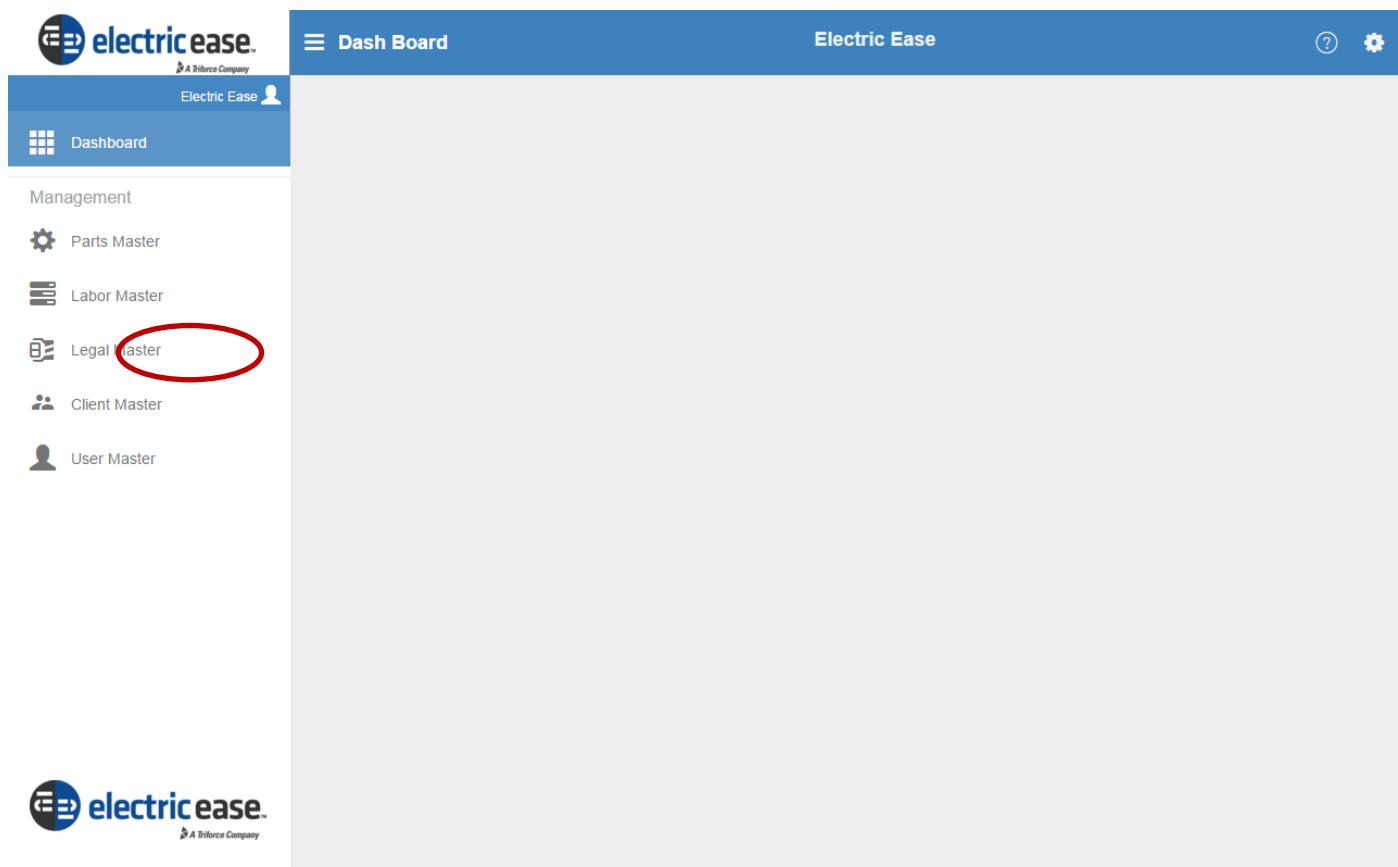
## **Client Master:**

This screen is used to maintain Client Company information

- To Add a new Client (Client company information)
- To Delete an existing client ( delete means inactive an active client)
- To Modify information of the Client Company
- Client master has the rights to add Client Admin
- Required fields can be identify by the **\* symbol**, if Required fields is empty, alert will be display when click on the **Add** button

Client Master Screen have two main parts

1. **Add Client details:** to Provide information of Client and to add/update
2. **Client Listing:** to list down all clients using ElectricEase Application



## Add Client Details Part:

**Add Client Details**

Client Company *:	Contact Person *:	Address :
Client Company	Contact Person	Address Address
Address2 :	City :	State :
Address2	City	State State
Zip Code :	Phone *:	Mobile *:
ZipCode	Phone	Mobile Mobile
Fax :	Email *:	Company Logo *:
Fax	Email	Choose file No file chosen

**Config Details**

Client Admin ID *:	Password * :	JobID Prefix :
Client Admin	Password	Prefix
Sender Email Address :	Sender Email Password :	Domain Name :
Sender Email	Sender Password	Domain Name
SMTP Host :	SMTP Port :	Auto Save Time(Secs) :
Host	Port	Seconds

**Add**    **Clear**

## Client Listing Part

**Client List**

Client ID	Client Company	State	City	Phone	Email	Action
1063	KBelectric			123456	kevin@kbelectric.com	
1064	epathusa			123457879	hnallure@epathusa.net	
1068	Kb info	Dallas Center	IA-IOWA	563-419-8113	tdonahue@dc-grimes.k12.ia.us	
1069	electric			12345678910	test@gmail.com	
1077	VS Electrics			267-372-827	kalkers@Electrics.net	
1078	test			12345667876	harikareddy.police@gmail.com	

Showing 1 to 6 of 6 entries

Previous **1** Next

## Adding a New Client:

Feed the Information of an client company along with the client Admin Name, Password and other details. Then click Add

Example,

**Client Company:** VS Electrics

**Client Admin Name:** Roger Kalke

**Password:** \*\*\*\*\*

Client can also upload their company logo

The screenshot shows the 'Client Master' section of the 'Electric Ease' software. On the left, there's a sidebar with icons for Dashboard, Management, Parts Master, Labor Master, Legal Master, Client Master (which is selected and highlighted in blue), and User Master. The main area has a header 'Client Master' and 'Electric Ease'. Below the header, there are two tabs: 'Add Client Details' and 'Config Details'. The 'Add Client Details' tab is active, showing fields for Client Company (VS Electrics), Contact Person (Roger Kalke), Address (1114 Southeast Belmont Drive), Address2 (Address2), City, State, Zip Code (ZipCode), Phone, Mobile, Fax, Email, and Company Logo (with a file upload button). A logo for 'VS Electric' is uploaded. The 'Config Details' tab shows fields for Client Admin ID (Roger), Password (\*\*\*\*\*), JobID Prefix (RK), Sender Email Address (Sender Email), Sender Email Password (Sender Password), Domain Name (Domain Name), SMTP Host (Host), SMTP Port (Port), and Auto Save Time (Seconds). At the bottom right of the 'Add Client Details' section are 'Add' and 'Clear' buttons.

Once the record is successfully added, you can see an alert message as "**New Client has been Added Successfully**", bottom right corner of the screen and Client Details will be added in the Client Listing table.

**electric ease.** A Triforce Company

### Client Master

#### Electric Ease

Fax:  Email:  Choose file No file chosen

**Config Details**

Client Admin ID* : Client Admin	Password * : Password	JobID Prefix : Prefix
Sender Email Address : Sender Email	Sender Email Password : Sender Password	Domain Name : Domain Name
SMTP Host : Host	SMTP Port : Port	Auto Save Time(SeCS) : Seconds

Add Clear

**Client List**

Show 10 entries Search :

Client ID	Client Company	State	City	Phone	Email	Action
1063	KBelectric			123456	kevin@kbelectric.com	
1064	epathusa			123456789	hnallure@epathusa.net	

New Client Has been Added Successfully!

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### Client Master

#### Electric Ease

**Edit Client Details**

**Client List**

Show 10 entries Search :

Client ID	Client Company	State	City	Phone	Email	Action
1063	KBelectric			123456	kevin@kbelectric.com	
1064	epathusa			123456789	hnallure@epathusa.net	
1068	Kb info	Dallas Center	IA-IOWA	563-419-8113	tdonahue@dc-grimes.k12.ia.us	
1069	electric			12345678910	test@gmail.com	
1071	AE Electricals electronics			267-372-827	aarthy@visentechnosoft.com	
1077	VS Electrics			267-372-827	kalkers@Electrics.net	

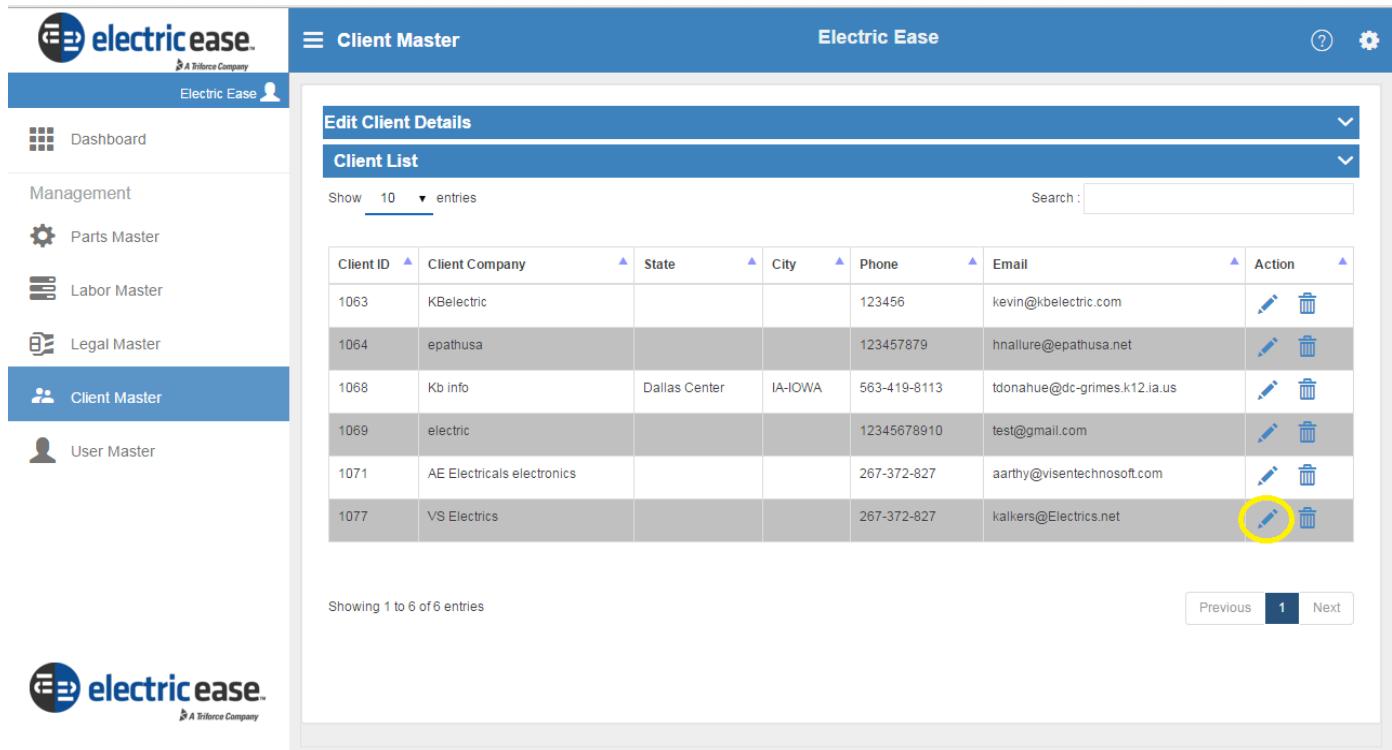
Showing 1 to 6 of 6 entries

Previous 1 Next

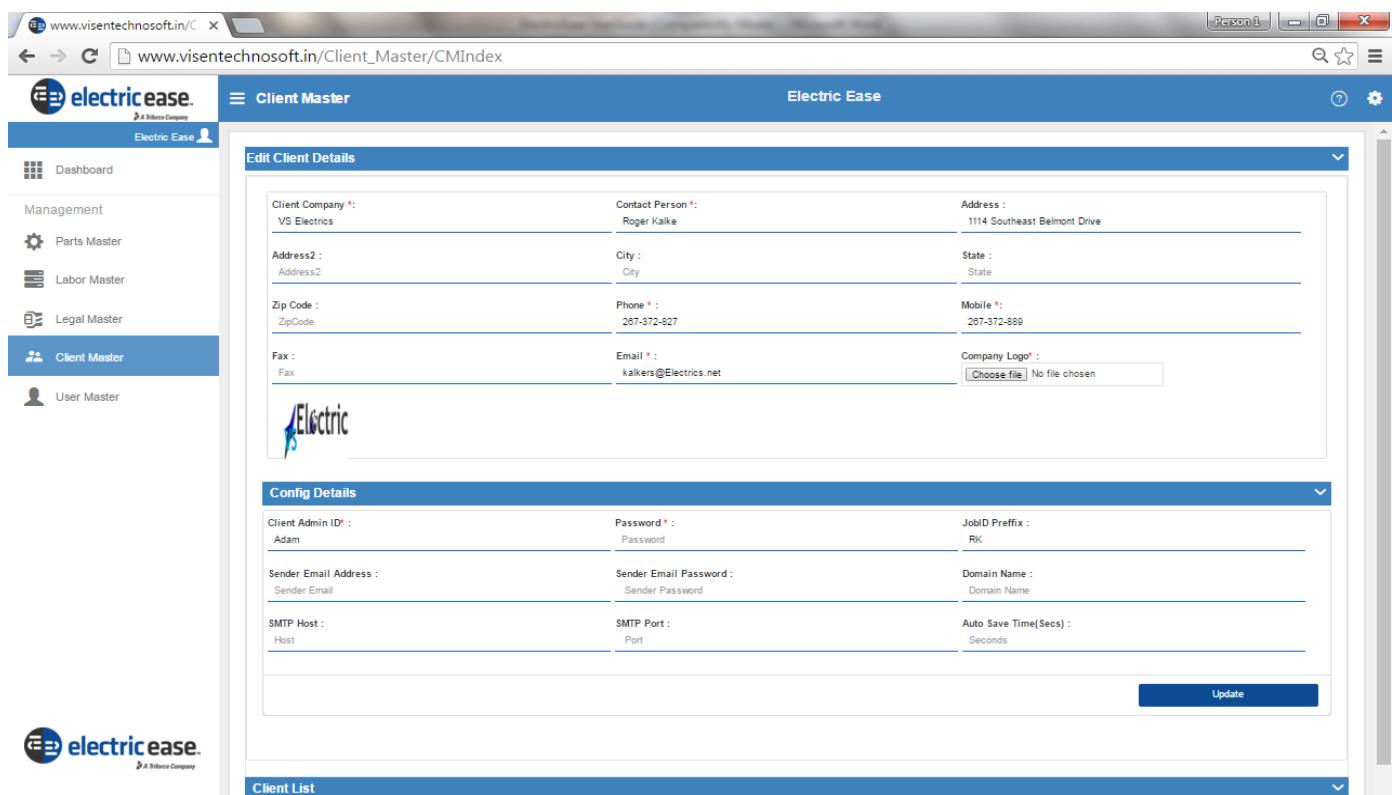
Here we have added the Client Company

#### Editing Client Details:

To edit the Client company details click on edit button 



The screenshot shows the 'Client Master' section of the Electric Ease application. On the left is a sidebar with navigation links: Dashboard, Management, Parts Master, Labor Master, Legal Master, Client Master (which is selected and highlighted in blue), and User Master. The main area is titled 'Client Master' and 'Electric Ease'. It displays a table titled 'Edit Client Details' with the heading 'Client List'. The table has columns for Client ID, Client Company, State, City, Phone, Email, and Action. There are six entries listed. The entry for Client ID 1077, Client Company 'VS Electrics', has an edit icon (pencil) in the 'Action' column circled in yellow. Below the table, it says 'Showing 1 to 6 of 6 entries' and there are 'Previous' and 'Next' buttons.



The screenshot shows the 'Edit Client Details' form for the client 'VS Electrics'. The form is divided into sections: 'Edit Client Details' (with tabs for General, Address, Contact, and Logo), 'Config Details', and 'Client List'. In the 'Edit Client Details' section, fields include Client Company (VS Electrics), Contact Person (Roger Kalke), Address (1114 Southeast Belmont Drive), Address2 (Address2), City (City), State (State), Zip Code (ZipCode), Phone (267-372-827), Fax (Fax), Email (kalkers@Electrics.net), and Company Logo (choose file). In the 'Config Details' section, fields include Client Admin ID (Adam), Password (Password), JobID Prefix (RK), Sender Email Address (Sender Email), Sender Email Password (Sender Password), Domain Name (Domain Name), SMTP Host (Host), SMTP Port (Port), and Auto Save Time (Seconds). At the bottom right of the 'Edit Client Details' section is an 'Update' button.

**Client Master**

**Electric Ease**

**Config Details**

New Client Has been Updated Successfully!

Once the Client Company details is updated we will get a successful message at bottom right corner as “**New Client has been Updated Successfully**”

### Deleting the Client Details:

To delete the Client company details click on delete button

Client ID	Client Company	State	City	Phone	Email	Action
1063	KBelectric			123456	kevin@kbelectric.com	
1064	epathusa			123457879	hnallure@epathusa.net	
1068	Kb info	Dallas Center	IA-IOWA	563-419-8113	tdonahue@dc-grimes.k12.ia.us	
1069	electric			12345678910	test@gmail.com	
1071	AE Electricals electronics			267-372-827	aarthy@visentechnosoft.com	
1077	VS Electrics			267-372-827	kalkers@Electrics.net	

The screenshot shows the Electric Ease Client Master interface. On the left sidebar, 'Client Master' is selected. The main area displays a table of client data with columns: Client ID, Client Company, State, City, Phone, Email, and Action. A confirmation dialog box is overlaid on the page, asking 'Are Sure Want To Delete this Parts?' with 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a yellow box.

Client ID	Client Company	State	City	Phone	Email	Action
1063	KBelectric			123456	kevin@kbelectric.com	
1064	epathusa			123457879	hnallure@epathusa.net	
1068	Kb info	Dallas Center	IA-IOWA	563-419-8113	tdonahue@dc-grimes.k12.ia.us	
1069	electric			12345678910	test@gmail.com	
1071	AE Electricals electronics			267-372-827	aarthy@visentechnosoft.com	
1077	VS Electrics			267-372-827	kalkers@Electrics.net	

Showing 1 to 6 of 6 entries

The screenshot shows the same Electric Ease Client Master interface as the previous one. The table of client data is identical. A green success message box at the bottom right corner says '✓ Client Details Deleted Sucessfully'.

Client ID	Client Company	State	City	Phone	Email	Action
1063	KBelectric			123456	kevin@kbelectric.com	
1064	epathusa			123457879	hnallure@epathusa.net	
1068	Kb info	Dallas Center	IA-IOWA	563-419-8113	tdonahue@dc-grimes.k12.ia.us	
1069	electric			12345678910	test@gmail.com	
1077	VS Electrics			267-372-827	kalkers@Electrics.net	
1079	VM Electricals			788-789-899	bunce@gmail.com	

Showing 1 to 6 of 6 entries

- Once you click on the delete button dialog box appear. Click "OK" button to confirm your decision. You will get success message at the bottom right corner as "**Client Details deleted successfully**". Else Click "Cancel" button to abort the process.

## Client Admin Login:

- When you login has client Admin, you got all the site rights other than the “Client Master” configurations.
- We have one generic logo for Client Admin for all clients; this is to differentiate a Client Admin and Client User
- Client Admin usually have all Administrative rights.

The screenshot shows the VS Electric Client Admin Dashboard. The top navigation bar includes the 'VS Electric' logo, the user name 'Roger', and a gear icon. Below the header, there are four status cards: 'Parts' (161), 'Assemblies' (1), 'Open Jobs' (0), and 'Closed Jobs' (0). The left sidebar, highlighted with a red box, contains links for 'Jobs', 'Parts Master', 'Labor Master', 'Legal Master', 'Assemblies Master', 'User Master', 'Reports', and 'Resources'. The 'Jobs' link is currently selected. The main content area features two panels: 'Job Description Report' and 'Job Calendar'. The 'Job Description Report' panel shows a table with columns for 'Job ID', 'Client Name', and 'Job Status', with a note that 'No data available in table'. The 'Job Calendar' panel displays a monthly calendar for April 2016, showing days from Sunday to Saturday. The 8th of April is highlighted as an 'UnAssigned Job'. The bottom of the page includes the 'electric ease.' logo and the text 'A Balfour Company'.