


Getting Started; User Basics

Lesson 1: Learning how to access & login to your workspace

Lesson 1 Overview

 You will learn how to access & login to your D'Harris Tours customer space.

Why should you consider using Firefox web browser to access our website?

It's free! Since your online business space resides online, you will access our software using most internet ready computer or mobile device. It will help you run our software smoothly. *We suggest you use Mozilla Firefox 5+, Google Chrome or Safari for your browser in order to enjoy the full functionality of your Simple Application.*



Safari

<http://www.apple.com/safari/download/>



Google Chrome

<http://www.google.com/chrome>



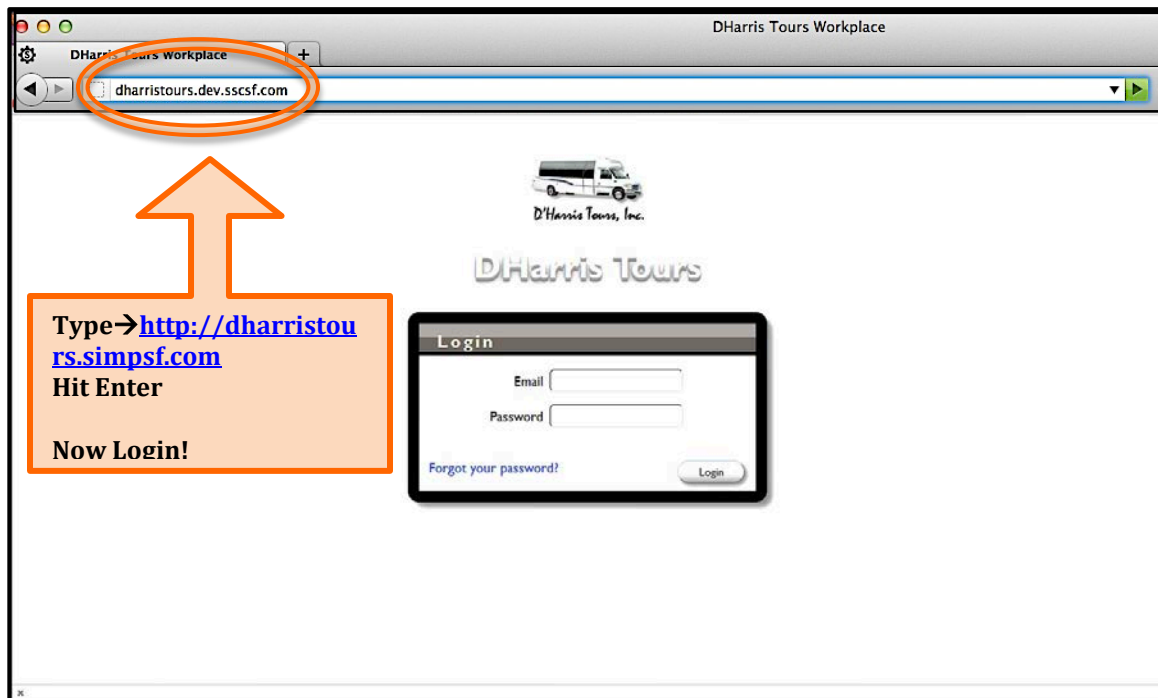
Mozilla Firefox

<http://www.mozilla.org/en-US/firefox/new/>

Accessing the website

Type into the URL → <http://dharristours.simpsf.com>

If you entered the correct URL once the page has loaded, you will see a login screen like this:



Logging into your Simple Workspace



Use your email address and password to login.

To use your Simple Workspace you will need to login to the system. When you first arrive at the Simple application you will be presented with a form asking for your email address and password. In order to access the Customer workspace for the first time you must contact Juana/ D'Harris Tours and ask to have an account set up. If you don't have an e-mail/password then you would have to request getting an account set up with Juana from D'Harris Tours

Login using your business email address and temporary password, which will be "simple1".

If you forgot the password to your "User Workspace"



[Forgot your password?](#)

Click on the link "*Forgot your password?*" The link will guide you through the necessary steps to retrieve your correct password.

Section 2: Basic fundamentals of navigating the customer space

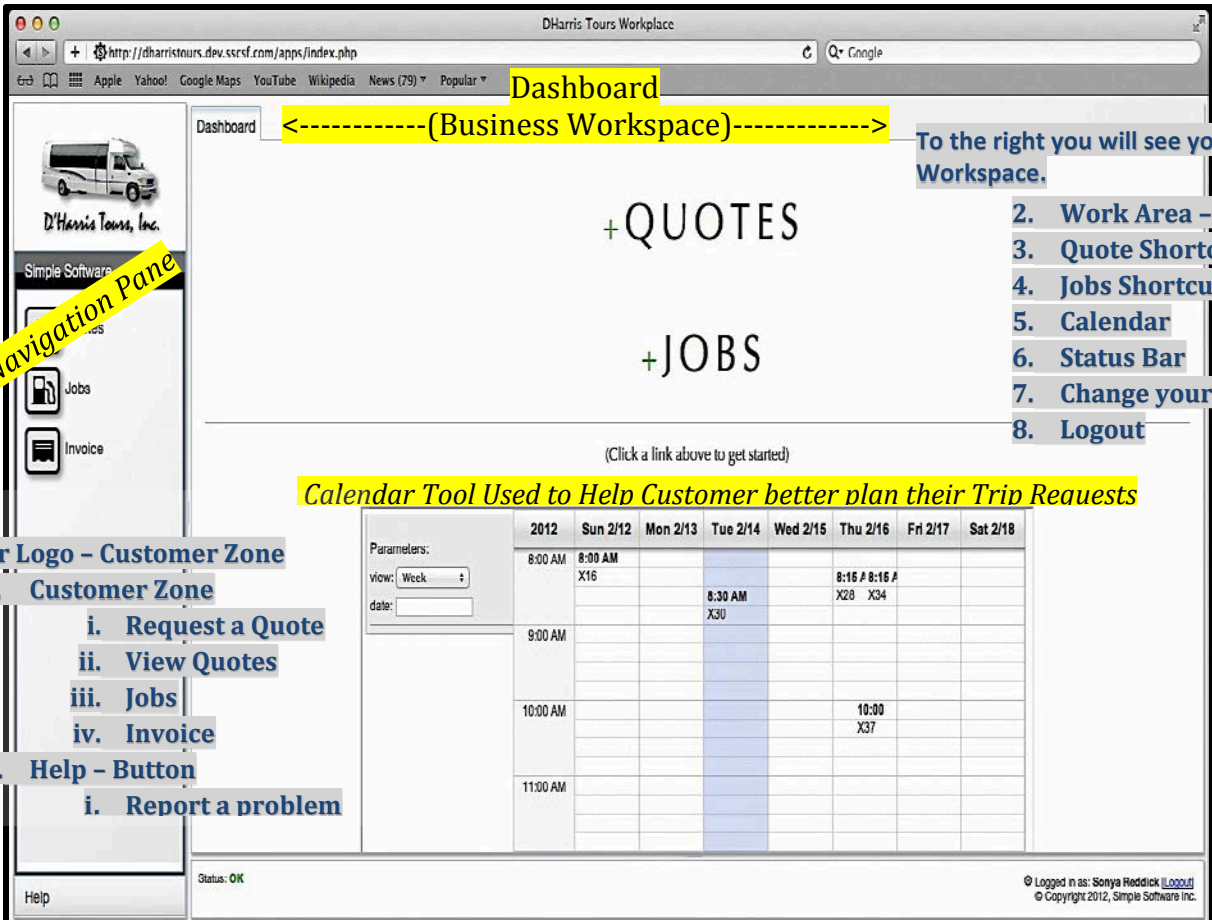
Lesson 2: Left Navigate Pane “101”

Lesson 2 Overview

-  You will gain an understanding of **the basic** fundamentals of navigating your workspace.
-  You will learn how to locate and use the “Left Navigation Pane”.
 - ✓ How to request, view, and edit quotes.
 - ✓ How to view or request a job.
 - ✓ How to keep track of Invoices from our company for the job done.
 - ✓ You will also learn how to “Report a problem

We will now explore the different components of the screen shot in below.

After logging in, you will see your customer User Space. There are many parts that make up your Workspace. We will go over these in detail but here is a quick reference:



The screenshot shows the DHarris Tours Workplace interface. The browser address bar displays `http://dharristours.dev.scsf.com/apps/index.php`. The page title is "DHarris Tours Workplace". The interface includes a "Dashboard" section with a yellow label "**Dashboard (Business Workspace)**". Below this, there are sections for "+QUOTES" and "+JOBS". A yellow label "**Calendar Tool Used to Help Customer better plan their Trip Requests**" points to a calendar tool. The calendar tool has a "Parameters" section with "view: Week" and "date:" fields. The calendar grid shows dates from 2012 to 2018, with specific times and job numbers (e.g., 8:00 AM X16, 8:30 AM X30, 8:15 P 8:15 P X28 X34, 10:00 X37) listed. The interface also features a "Left Navigation Pane" with a yellow label and a "Help" button. A status bar at the bottom shows "Status: OK" and a login/logout link.

1. Under Logo – Customer Zone

- a. Customer Zone**
 - i. Request a Quote
 - ii. View Quotes
 - iii. Jobs
 - iv. Invoice
- b. Help – Button**
 - i. Report a problem

2. Work Area – Dashboard

3. Quote Shortcut Button

4. Jobs Shortcut Button

5. Calendar

6. Status Bar

7. Change your password

8. Logout

Dashboard (Business Workspace)

Calendar Tool Used to Help Customer better plan their Trip Requests

Left Navigation Pane

Help

Status: OK

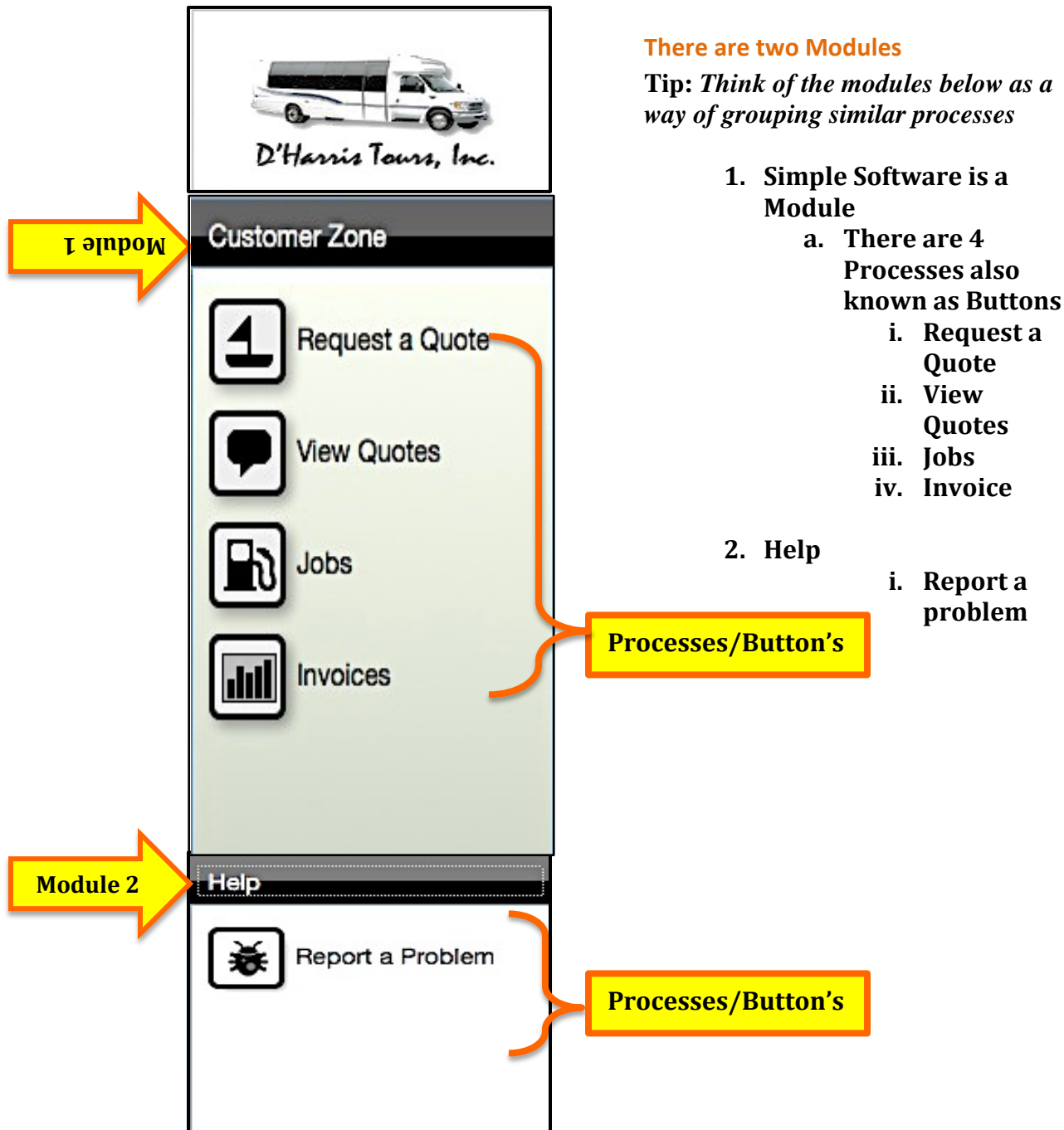
Logged in as: Sonya Reddick (Logout)

© Copyright 2012, Simple Software Inc.

Simple steps to navigate and explore the different components of the screen shot above s listed below.

1 & 2 / Left Navigation layout review

On the left side of the website page is located a D'Harris Tours company logo. The left navigation is under the logo. You will see a few modules and process.

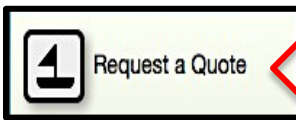


(Sometimes referred to as "left navigation pane")

A closer look at what's in our
How to request a quote

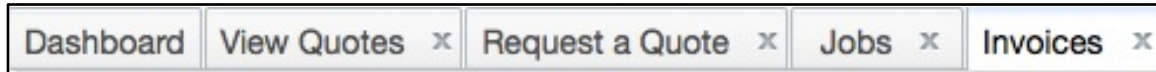
Customer Zone

section...

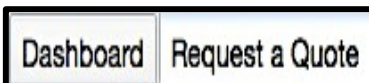


Click on the "Request a Quote" link. A tab will open up to the right of the navigation pane.

Tabs are



If you select the process titled "Request a Quote", a tab will open in your workspace. On the right there will be two tabs open.



The 1st tab reads "Dashboard". Next to it you will see any other processes you have opened. *The "Request a Quote," tab will be bold because it is the active process.*

Tabs give you quick access to switch tasks without losing any data. The page is never reloaded! You can switch back and forth just like a desktop application.

Dashboard Request a Quote x

Save Actions

A new tab will appear "Request a Quote"

Quote ID: [New Entry] **Now you may enter all the trip information inside the form under the tab.**

☒ Send email notification of updates

Company Name: --

Trip Date:

Round Trip: Yes

Start Time: 01 : 00 am

End Time: 01 : 00 am

Est Hours:

of Passengers:

Contact Name:

Phone:

Pickup Address:

Drop Off Address:

Budget Amount:

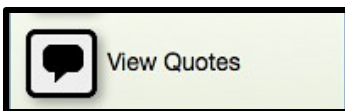
Wheel Chair: No

School Pupil Activity BusNo

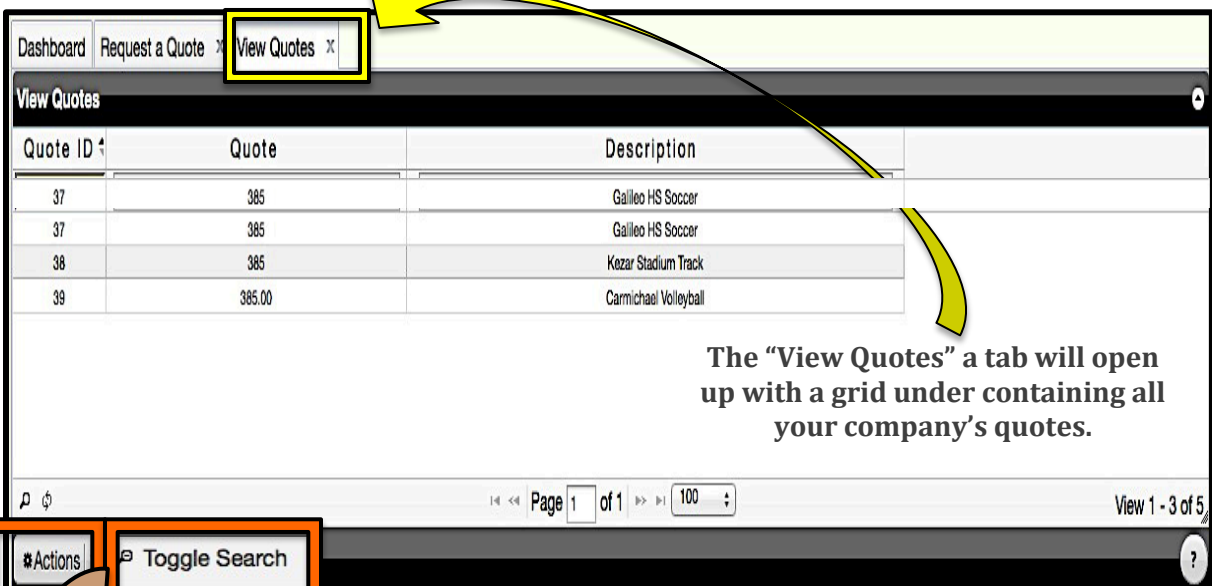
Click SAVE and you will be automatically updated via e-mail

D'Harris will 1st update the quote request then notify you via e-mail w/Quote amount

How to view quotes



Clicked on the "View Quotes" link a tab will open up to the right of the navigation pane.



View Quotes

Quote ID	Quote	Description
37	385	Gallileo HS Soccer
37	385	Gallileo HS Soccer
38	385	Kezar Stadium Track
39	385.00	Carmichael Volleyball

Page 1 of 1 100 View 1 - 3 of 5

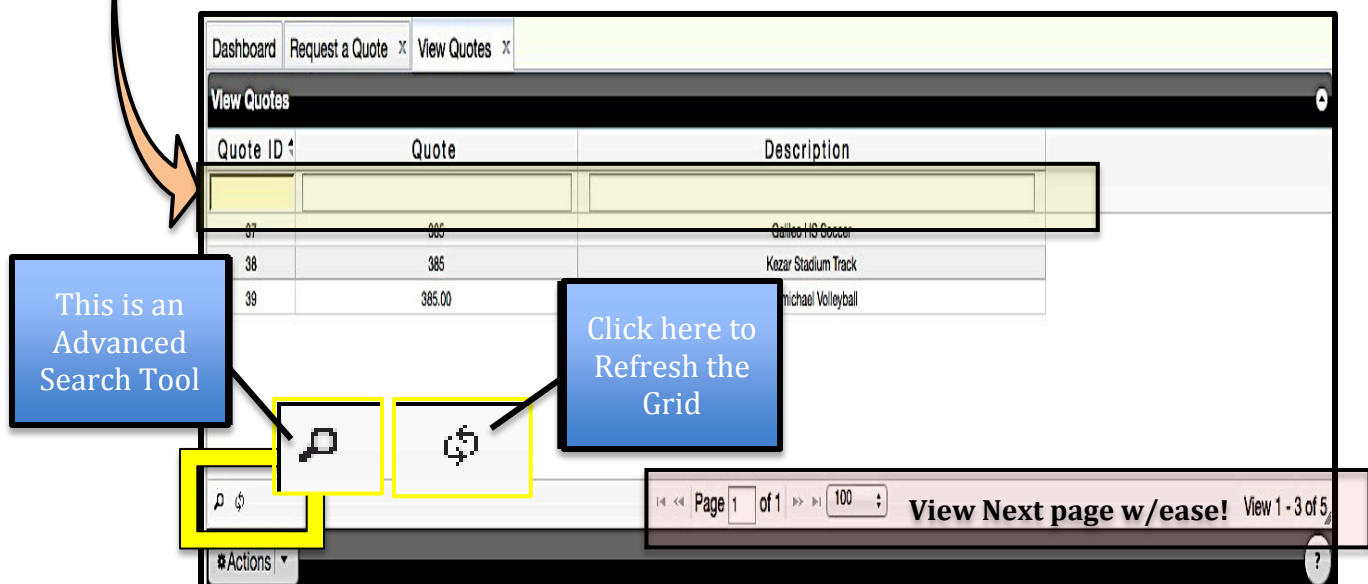
#Actions Toggle Search

Columns Save Layout

The "View Quotes" a tab will open up with a grid under containing all your company's quotes.

Click on the "Toggle Search" button. A search bar will pop up allowing you to customize how you search for a quote, job, or invoice.

Click on the "Toggle Search" button again and it will hide the search bar.



View Quotes

Quote ID	Quote	Description
37	385	Gallileo HS Soccer
38	385	Kezar Stadium Track
39	385.00	Carmichael Volleyball

Page 1 of 1 100 View Next page w/ease! View 1 - 3 of 5

#Actions

This is an Advanced Search Tool

Click here to Refresh the Grid

How to view



Jobs

Dashboard Request a Quote x View Quotes **Jobs x**

A tab will open up allowing you to view existing jobs & upcoming jobs

Click here to view any upcoming or existing jobs!

Job ID	Job	Description
	SFUSD	
599	SFUSD G Volleyball-599 Cancel	Girls Volleyball
600	SFUSD G Volleyball 600 Cancel	
601	SFUSD Burton HS G Volleyball 601	
602	SFUSD G Volleyball 602 cancel	description
603	SFUSD G Volleyball 603	Boarding Time 16:00
604	SFUSD G Volleyball 604 invoice 1397	Boarding time 19:00
607	SFUSD Lowell HS G Volleyball 607	
608	SFUSD Burton HS G Volleyball 608	

Page 1 of 1 100 View 1 - 100 of 316

Save Hit print to print job itinerary

Job ID: 599

Print

Confirmed: No Hours: 4.75
Job: SFUSD G Volleyball-599 Cancel Quote Amount: \$ 450
Job Date: 2010-08-20 Business Location: Galileo High School
P/U Time: 14:15:00 Contact: Sonya Reddick
D/O Time: 19:00:00 Phone: 415-695-5600
Num Pax: 30 Description: Girls Volleyball
P/U Location: 1150 Francisco St San Francisco Special Instructions:
D/O Location: 100 Skyway Drive, San Jose
Final D/O: 1150 Francisco St. San Francisco Completed: 0
Trip Cancelled: 1

▼ Employee

Employee ID	Employee	Active	Email	Alt Email
2	Juana	1		

▼ Business **All related information will appear here at the bottom of the form page.**

Business ID	Business	District	Email	Attn To
102	SFUSD (Sonya)	Sonya	reddick@sfusd.edu	Sonya Reddick

Invoices

**Select Job
and a form
will
appear
below
w/Invoice
details for
Job**



**Hit print to
re-print
your Invoice**

1. Dashboard and Tabs

- Locate shortcut buttons
- How to view the calendar
- Understand what the status bar does, how to change your password and log out

Overview of Dashboard shortcut buttons

To the right of the “Navigation Pane” is your “Dashboard”. There are a 2 buttons that are shortcuts.

1st shortcut

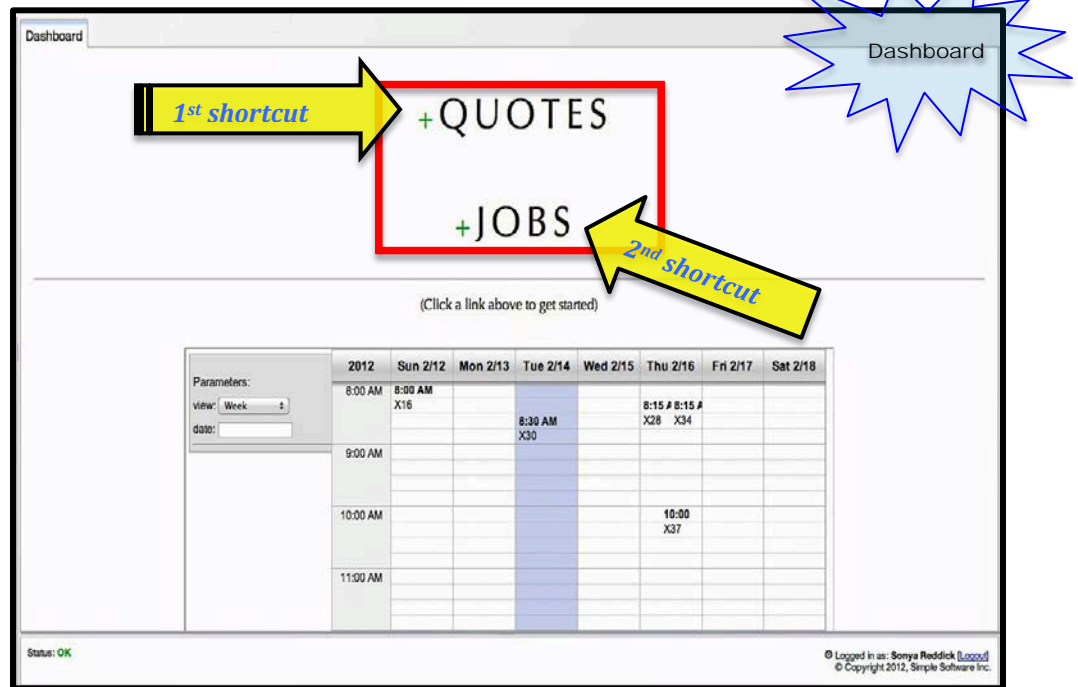
+ Quote -

To add a new quote (job) click “+ Quote”.

2nd shortcut

+ Jobs -

Click here to view or confirm jobs.



Remember to use the shortcuts

1st shortcut → + Quote

This is used to add a new quote (job).

* This is a shortcut for “Request a Quote” button located under the “Customer Zone” section.

2nd shortcut → + Jobs

This shortcut is used when wanting to view existing jobs or when wanting to confirm jobs.

* This is a shortcut for the “Jobs” button located under the “Customer Zone” section.

Dashboard Calendar View

Dashboard

(Click a link above to get started)

Parameters:

view: Week

date: 2/15/2012

Week

Day

Week

Month

2012

Sun 2/12

Mon 2/13

Tue 2/14

Wed 2/15

Thu 2/16

Fri 2/17

Sat 2/18

8:00 AM

8:00 AM X16

8:30 AM X30

8:15 A X28

11:00 AM

12:00 PM

1:00 PM

1:30 PM X35

All Day

date: 2/15/2012

February

S M T W T F S

29 30 31 1 2 3 4

5 6 7 8 9 10 11

12 13 14 15 16 17 18

19 20 21 22 23 24 25

26 27 28 29 1 2 3

4 5 6 7 8 9 10

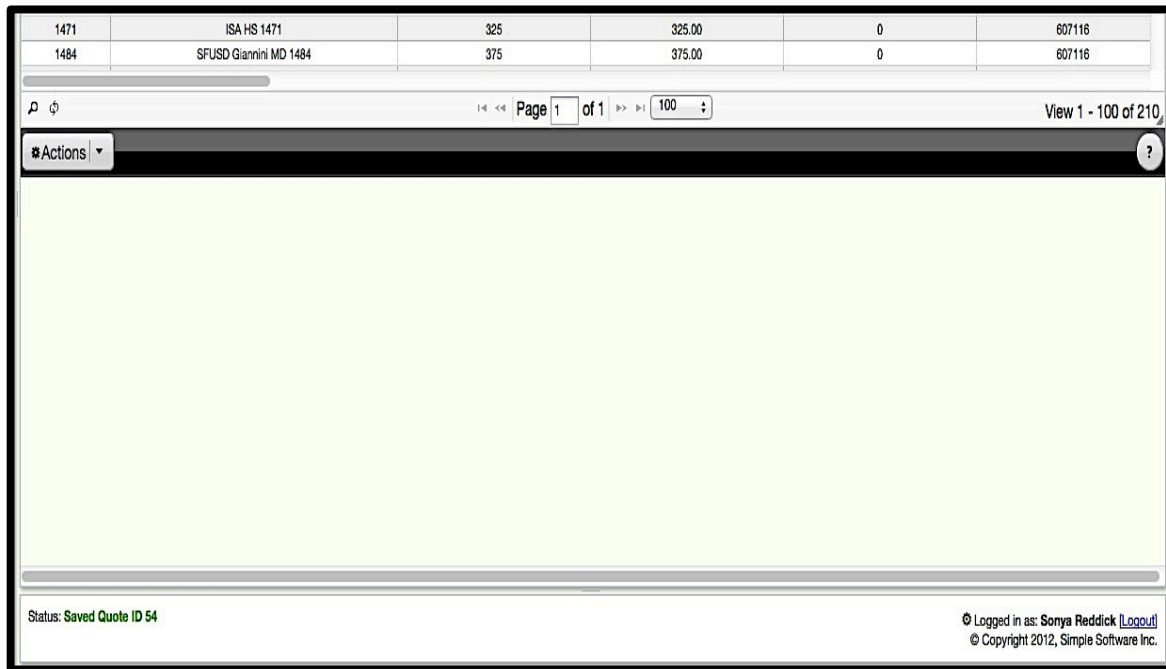
2011 2012 2013

Here you're able to see all daily, weekly, and monthly jobs

This tool can be used to help better assess future job requests and check availability quickly!

Lets take a closer look: Your dashboard is your work area

To the bottom of the screen under your work area, you will see a “Logged in as” & a “Status” box.



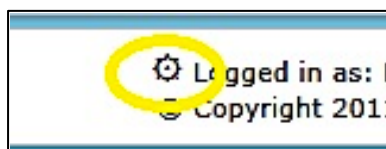
The status bar provides information such as:

- system status
- add, delete, update, relate to records
- person that is currently logged in

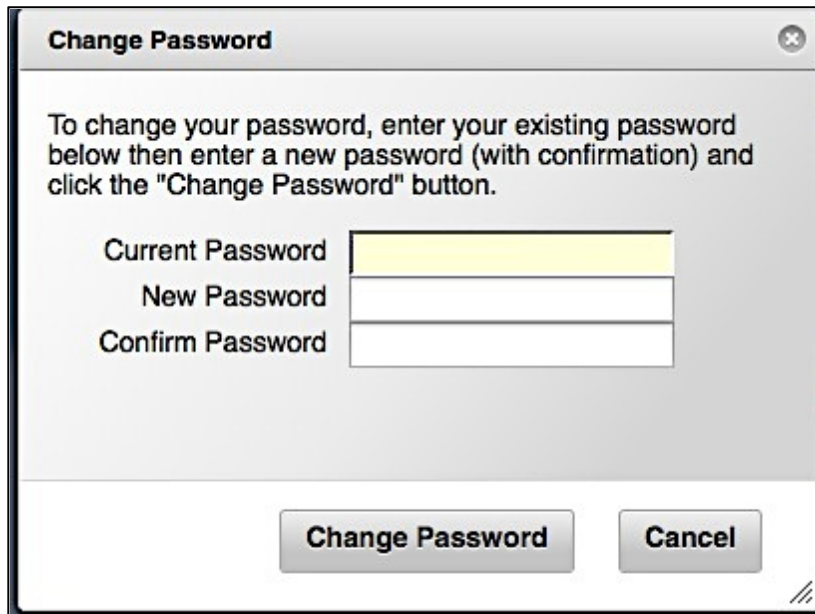
The Status will be highlighted in green, alerting you of changes with work done in your workspace.



The ‘gear’ symbol allows you to change your password.



Once you click on the symbol above the “Change Password” dialogue will appear.



A dialog box titled "Change Password" with a close button (X) in the top right corner. The text inside reads: "To change your password, enter your existing password below then enter a new password (with confirmation) and click the 'Change Password' button." Below the text are three input fields: "Current Password" (highlighted in yellow), "New Password", and "Confirm Password". At the bottom are two buttons: "Change Password" and "Cancel".

then...



A horizontal status bar with a blue border. On the left, it says "Status: OK" in green. On the right, it says "Logged in as [username] [Logout]" with a yellow arrow pointing to the "[Logout]" link. Below this, it says "© Copyright 2011, Simule Software Inc."

After you change your password, you must log out and then log back in.

