FireSoft®

Application Reviewer's Guide

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What you will find in this document:

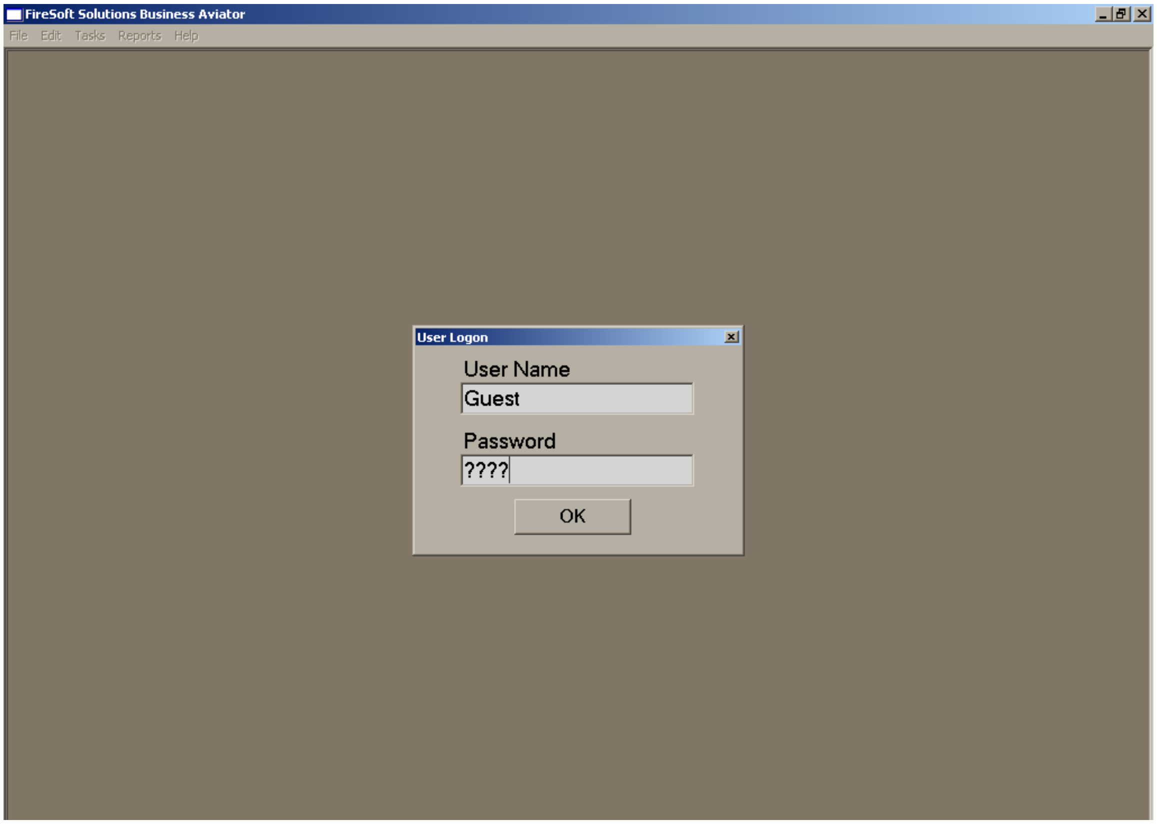
The purpose of this document is to provide a brief review of the FireSoft® software application. This review includes an overview of general usage, creation of a new customer including addition of and management of the customers departments, and the addition of installation jobs and service management.

Only a couple reporting mechanisms are contained within this document. Your company will have custom reports that meet your personal needs. Currently some custom reports may not display any data in the Demo Application due to the reliance on SQL Server Reporting that is not an available feature when utilizing the Microsoft SQL Server® Desktop Engine (MSDE).

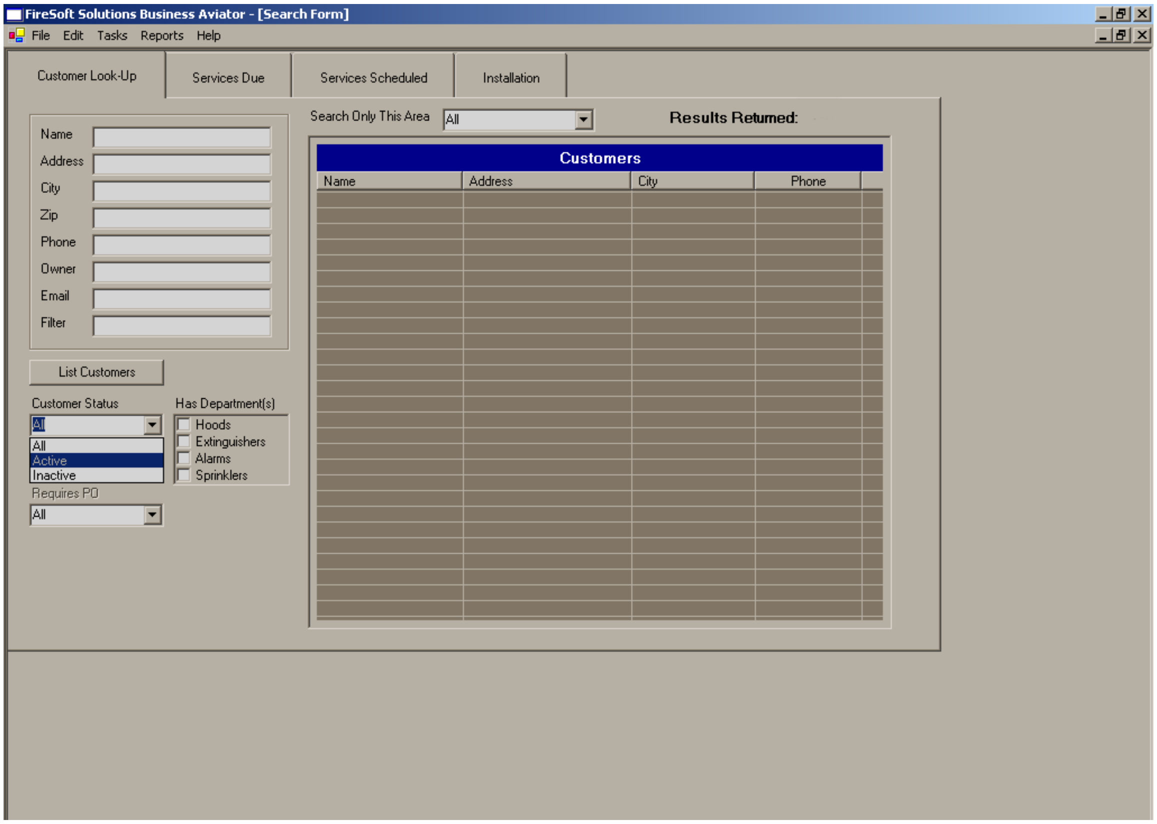
This document is intended to be read from start to finish. Some information regarding customers may be found in the installations or service management sections that are not contained in the customer section of the document.

The contents listing is solely for convenience and should only be used as a reference once the document has been read thoroughly.

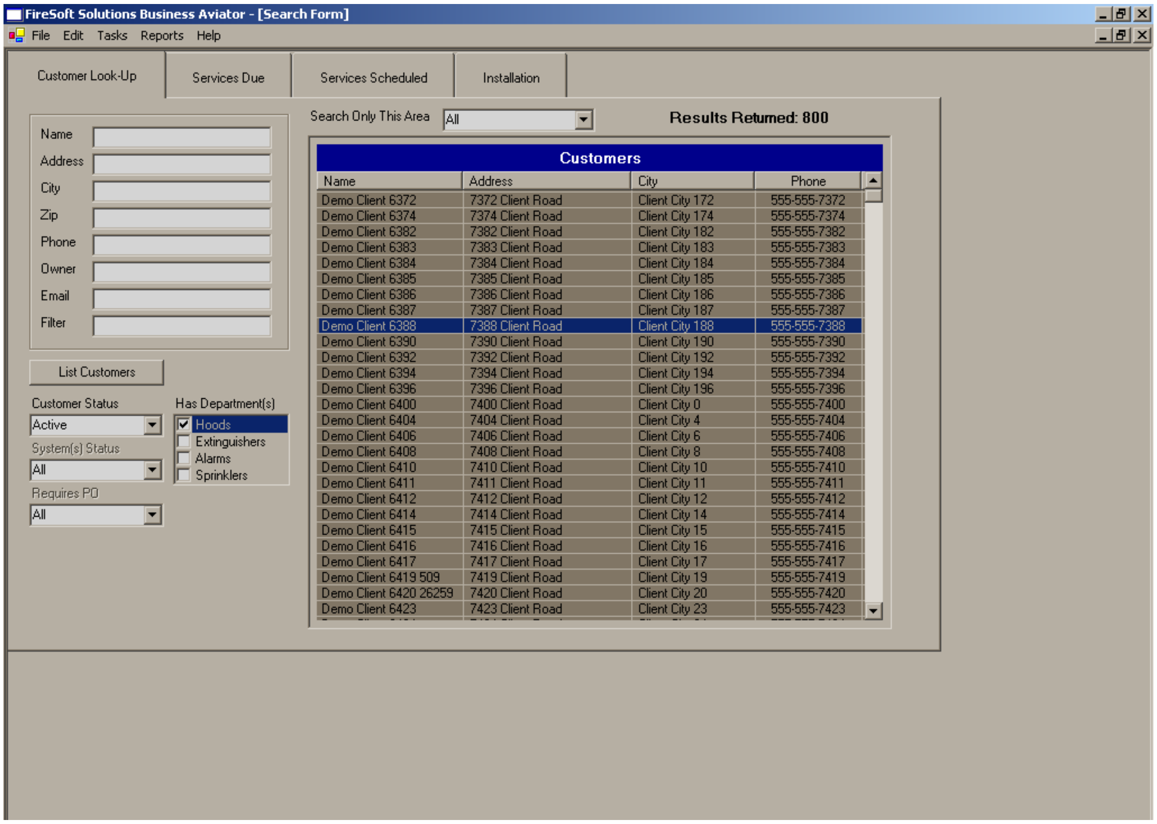
The initial application entry point is the logon screen, where a user of the system provides a username and password to access the application.



After successfully logging in to the application, the search form is presented to the user.

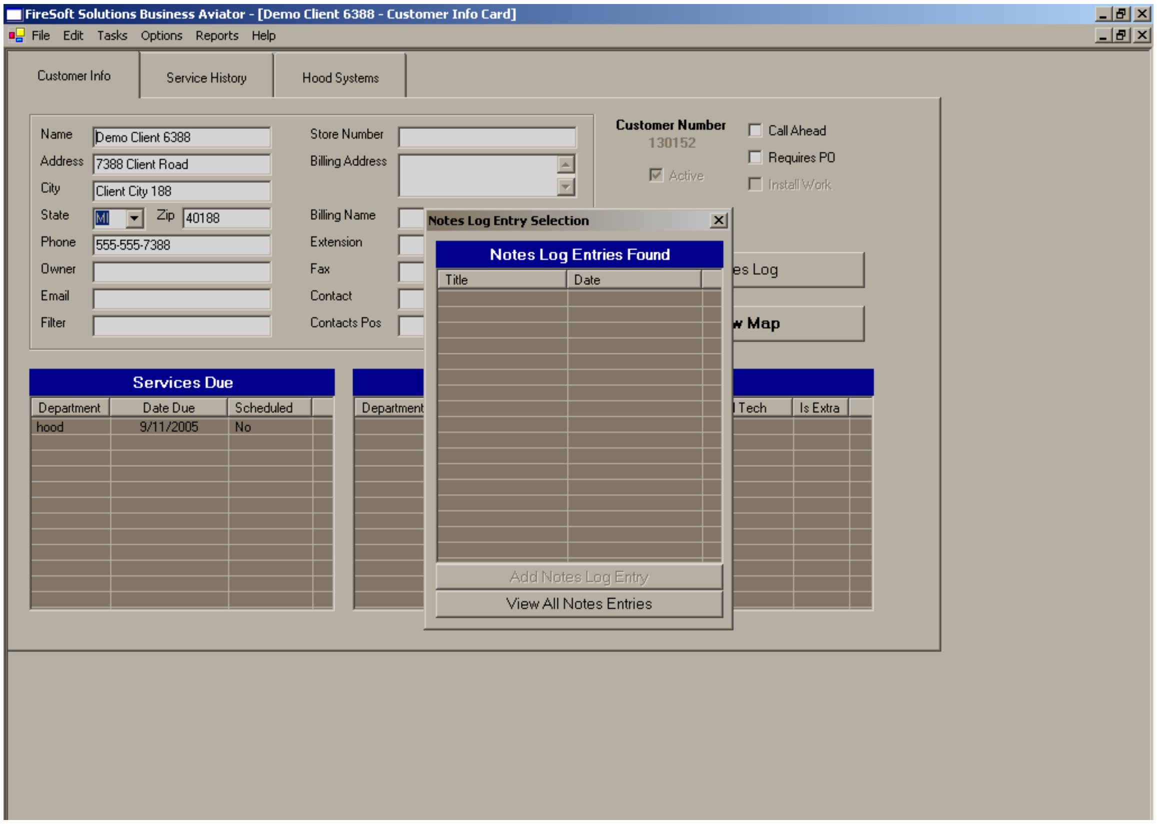


By default, the customer look-up tab is selected, where search criteria can be specified to locate customers in the system.



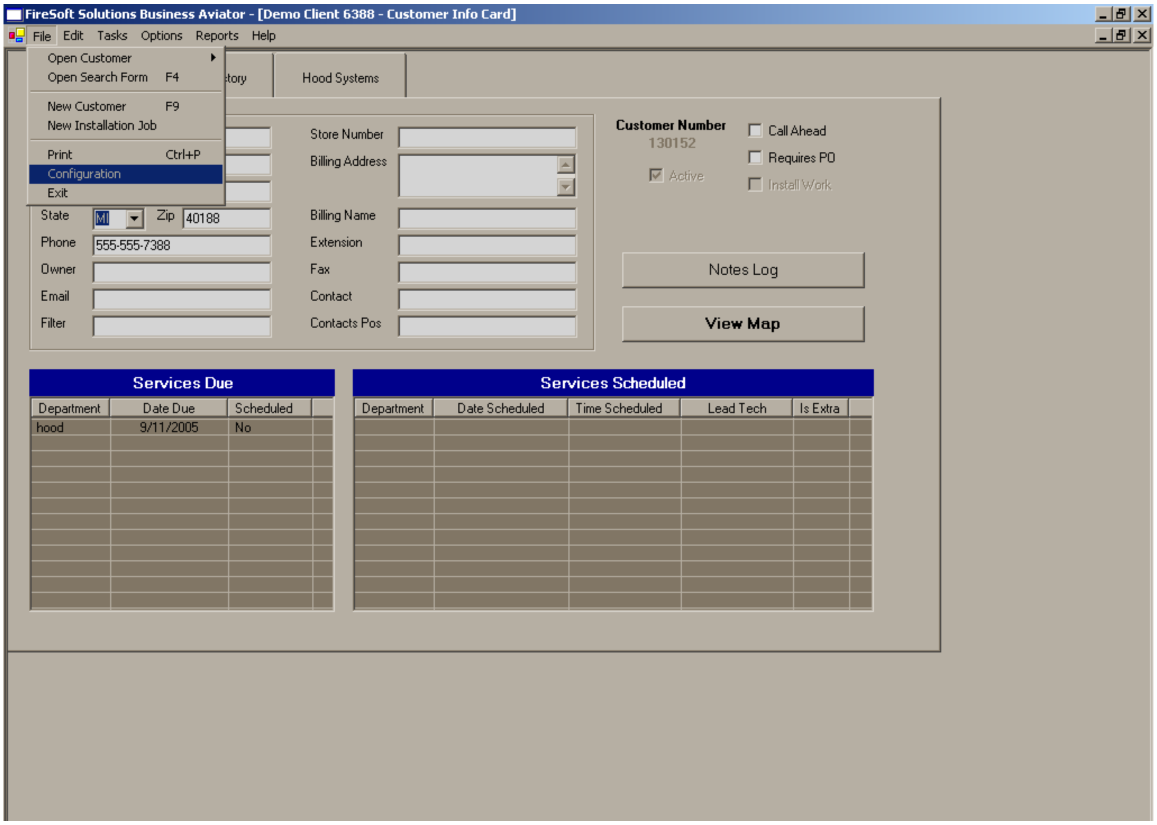
In this screenshot, we searched for customers with an ‘Active’ status in the system, which had the Hood Systems department serviced by our company.

By double-clicking on the customer, the customer information card is presented which contains details on the customer.

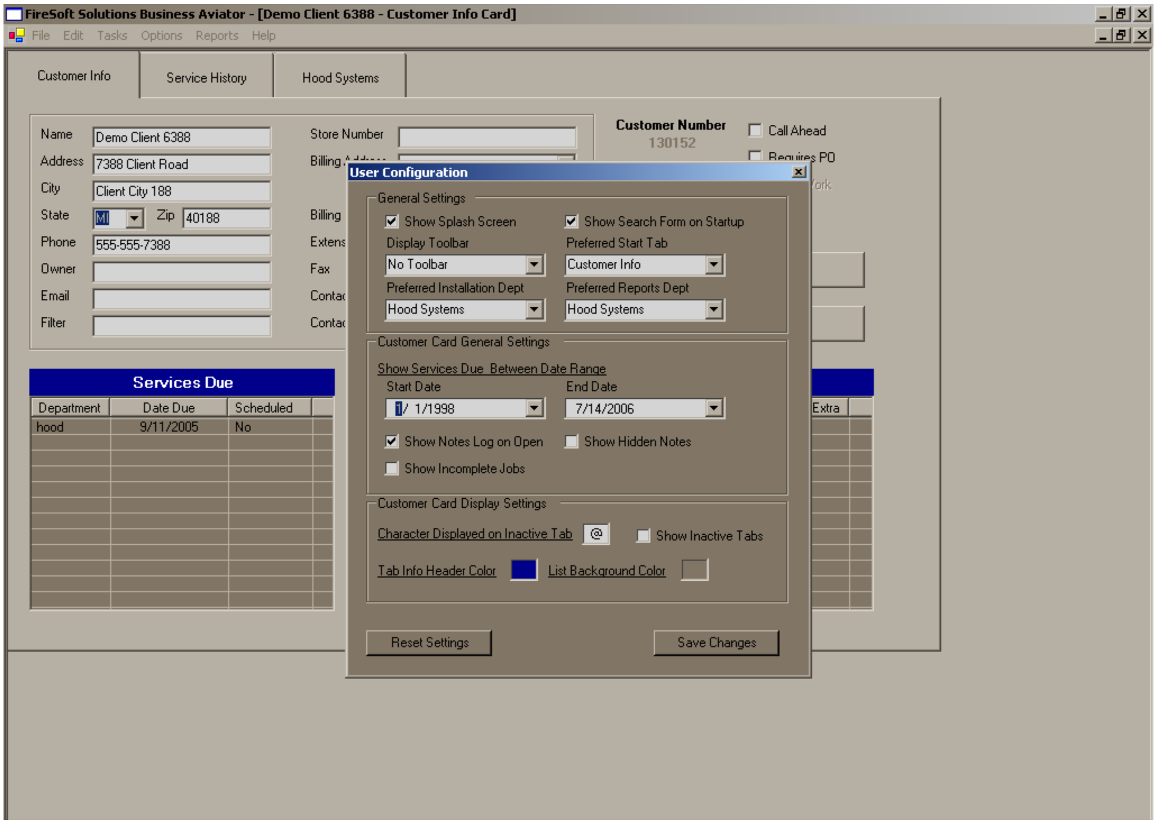


You will also notice that by default a 'Notes Log' selection form is displayed. Any notes regarding the customer added by a department for public viewing will display here.

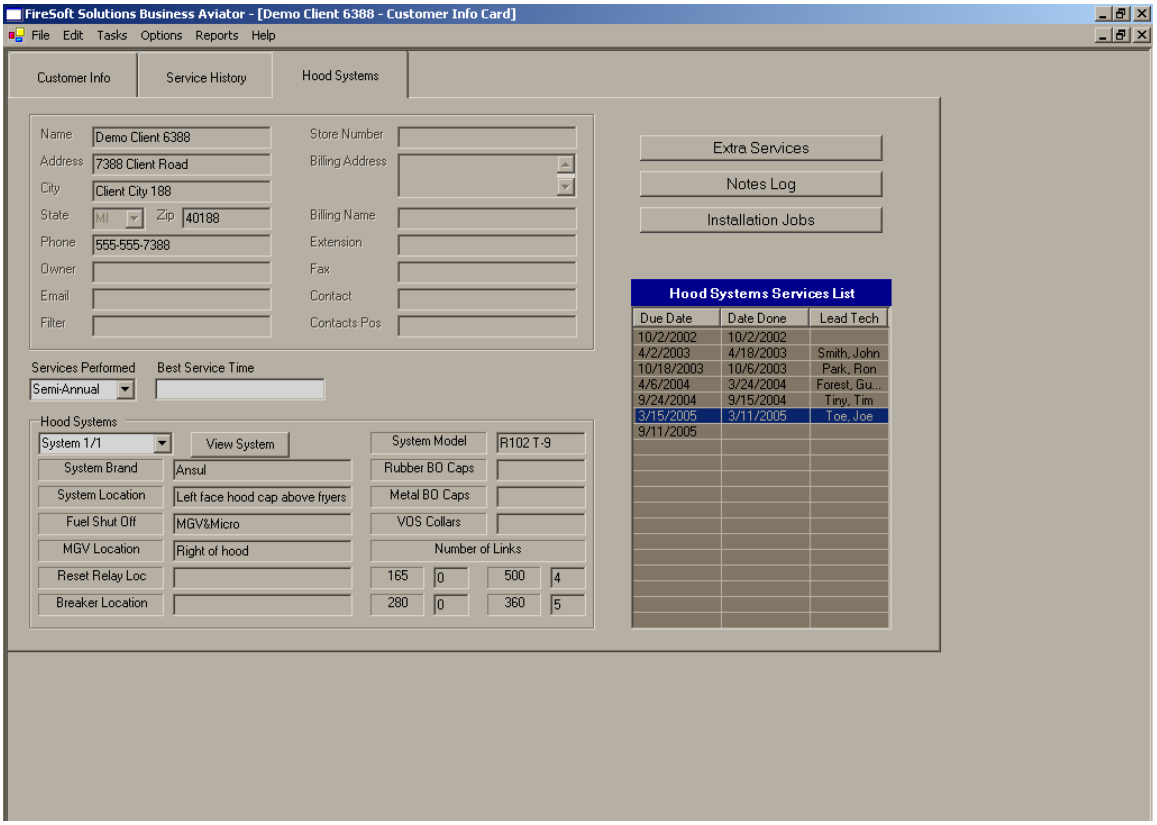
The configuration options allow the user to customize preferences such as whether or not to display this notes log selection when a customer is first opened.



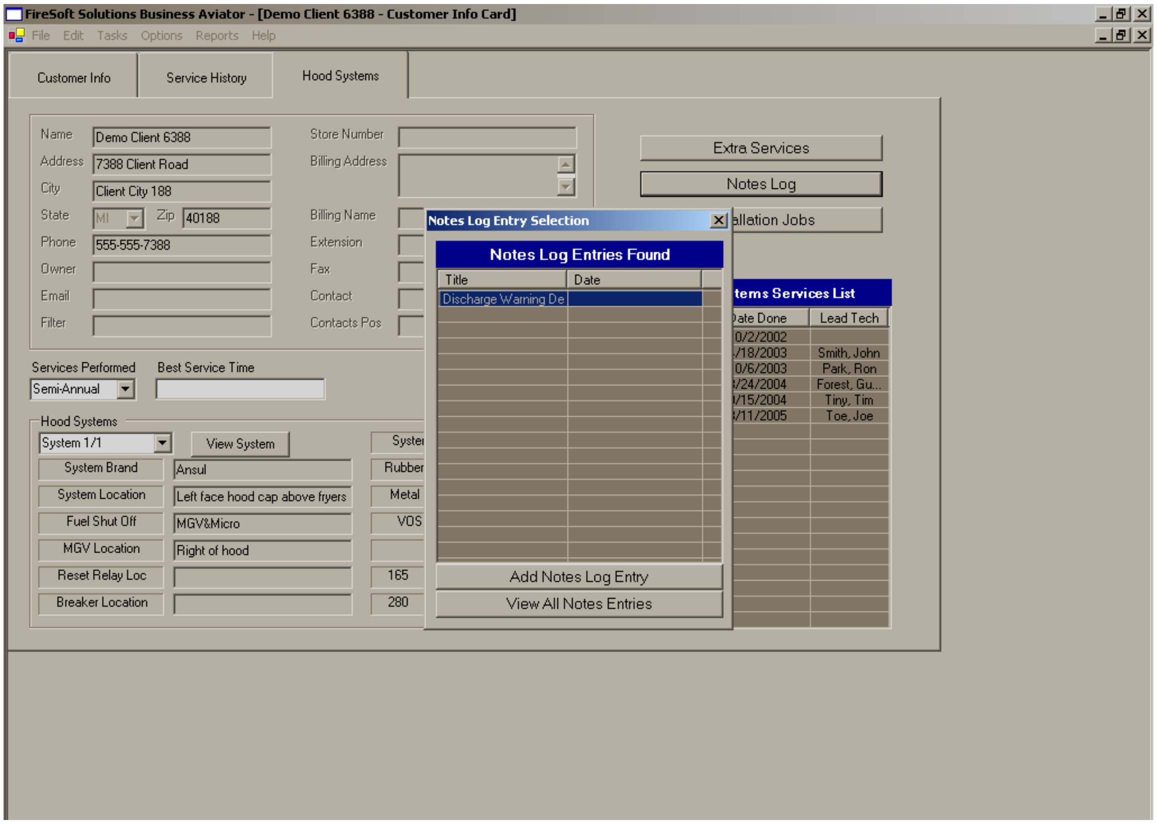
As you can see here, there are several customizable options that are stored uniquely for each user of the system.



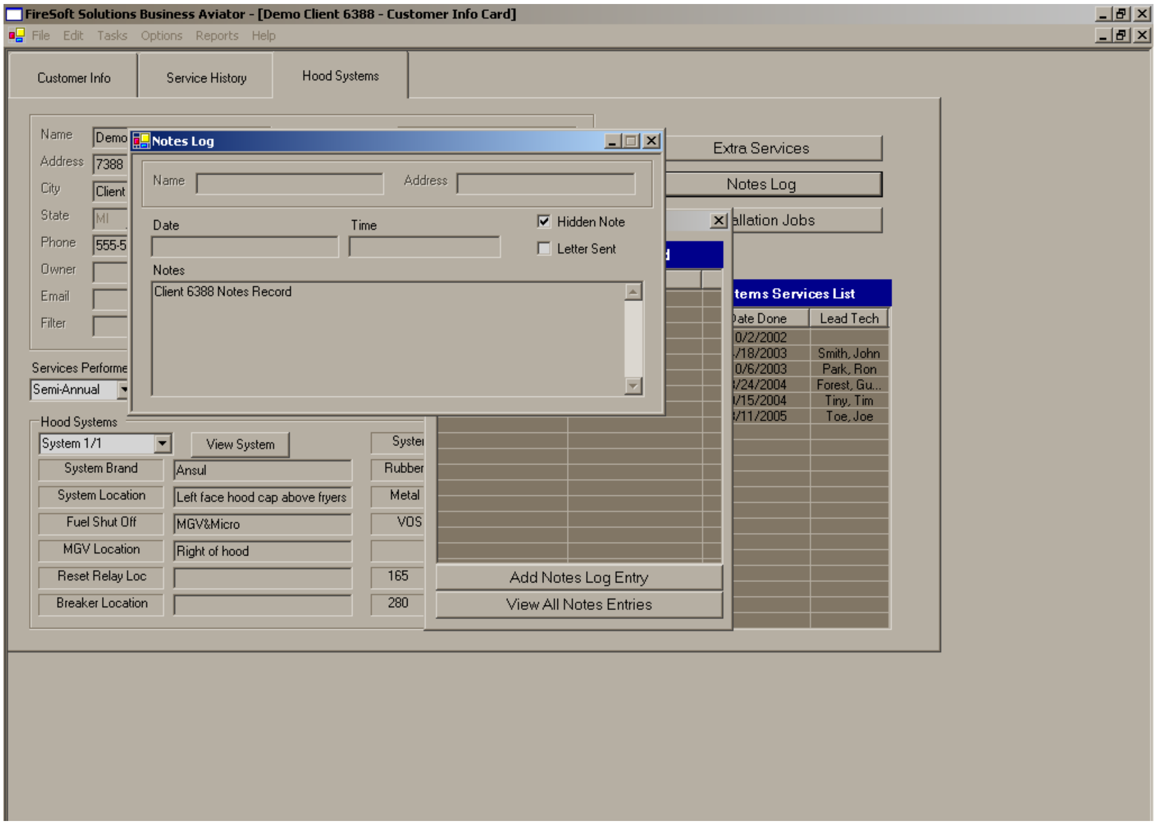
By clicking on a department tab (Hood Systems in our case) from within the customer card, information specific to that department's services and system details are displayed.



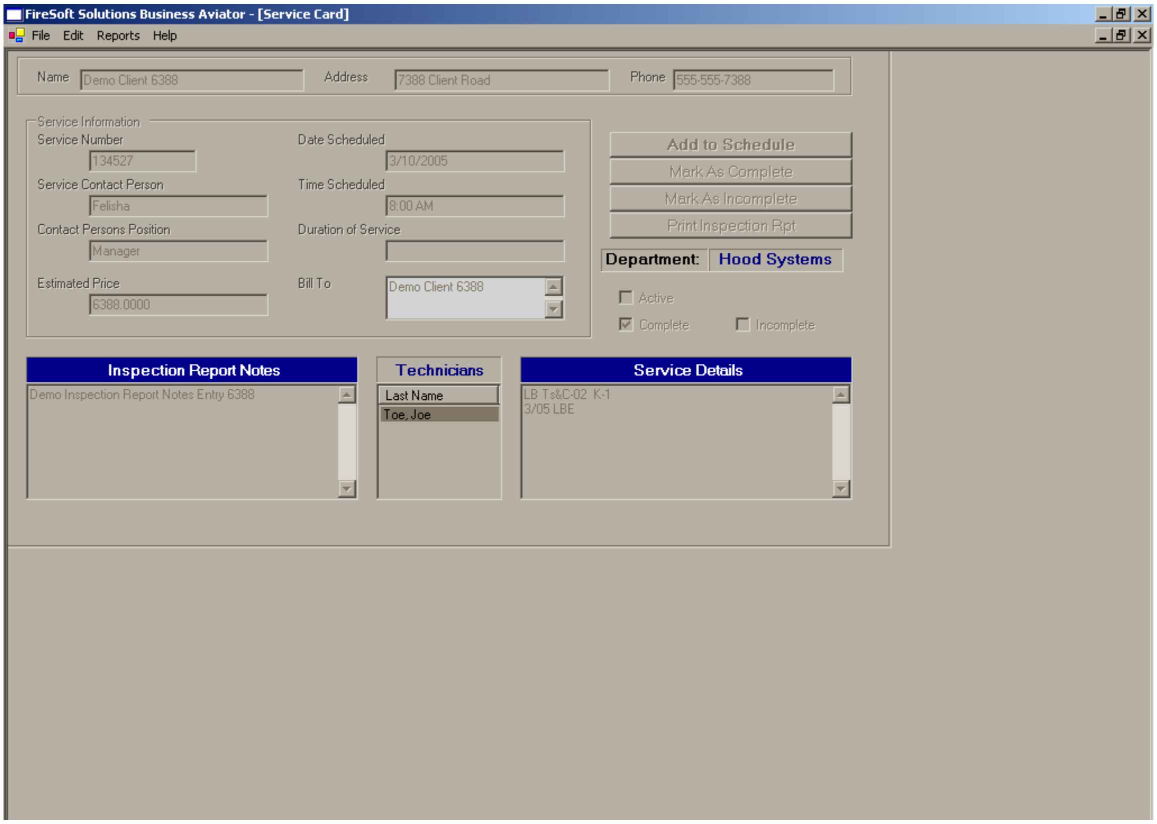
By clicking on ‘Notes Log’, the notes specific to the department are displayed.



You'll notice that Hood System department notes exist for this customer, although they weren't displayed when the customer was first opened. This is because the note was set to 'hidden' so only the department making the note sees it visible.

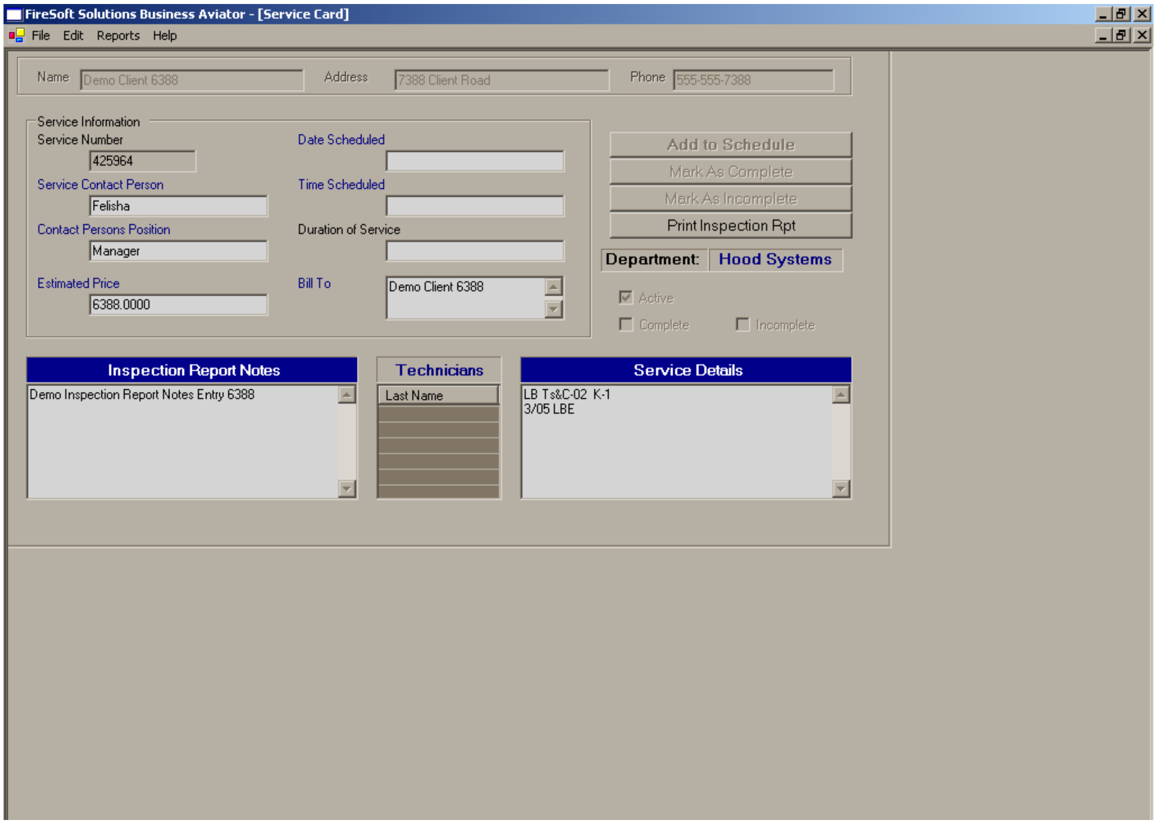


Also from the Department tab, double clicking on a service in the services list opens the 'Service Card'



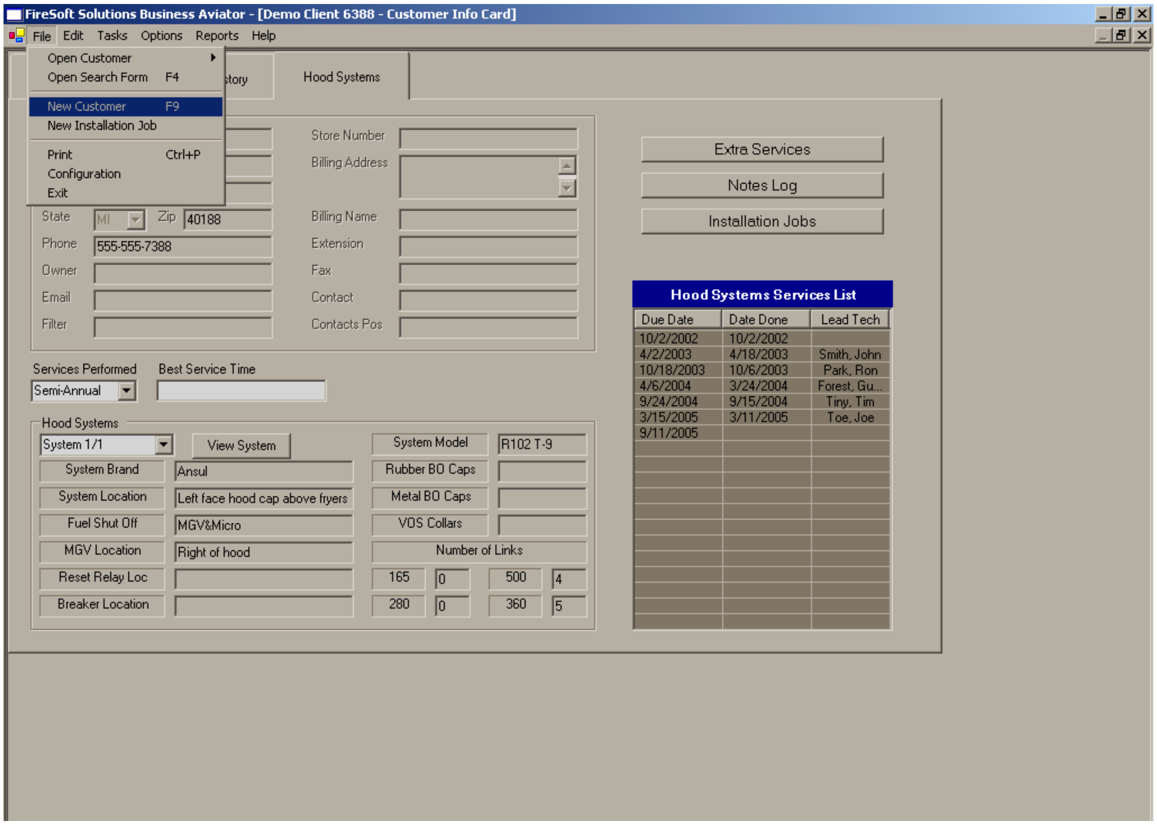
This particular service has already been marked as complete, so it cannot receive any further modifications.

A service opened that has not yet been completed will allow editing of all information.

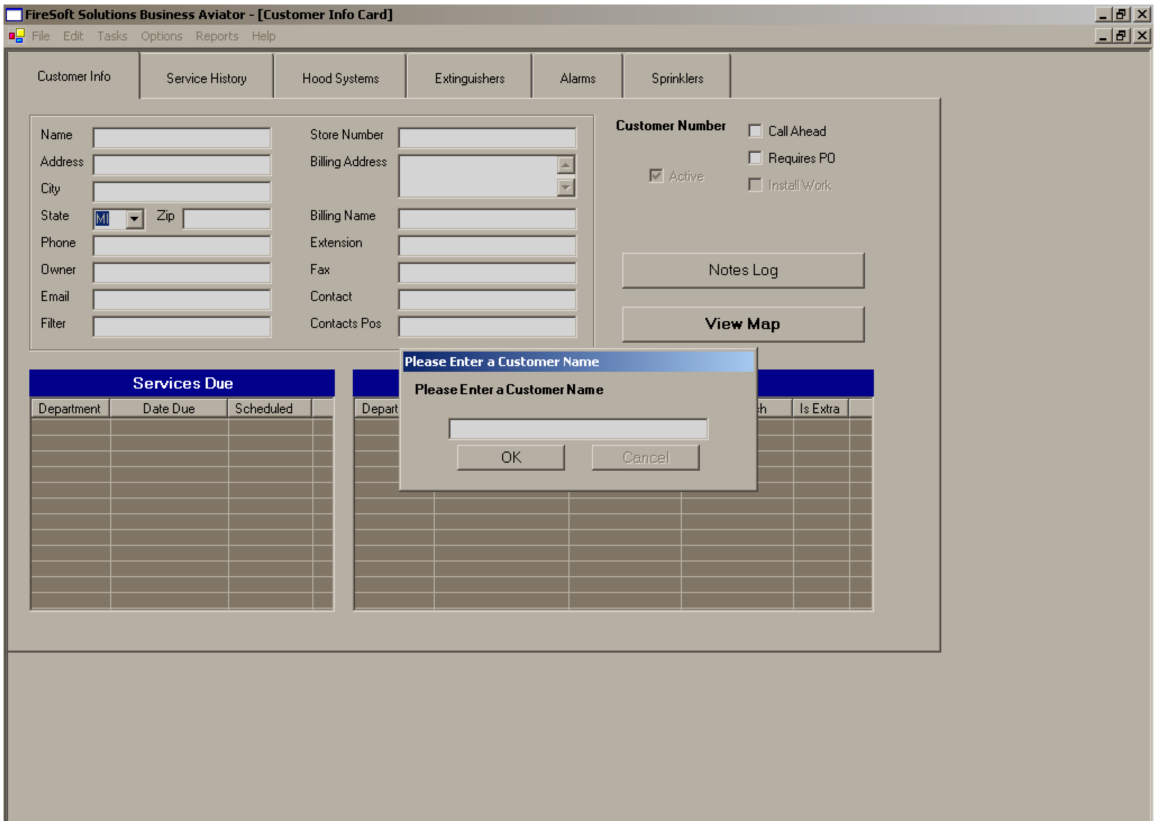


Adding a new Customer

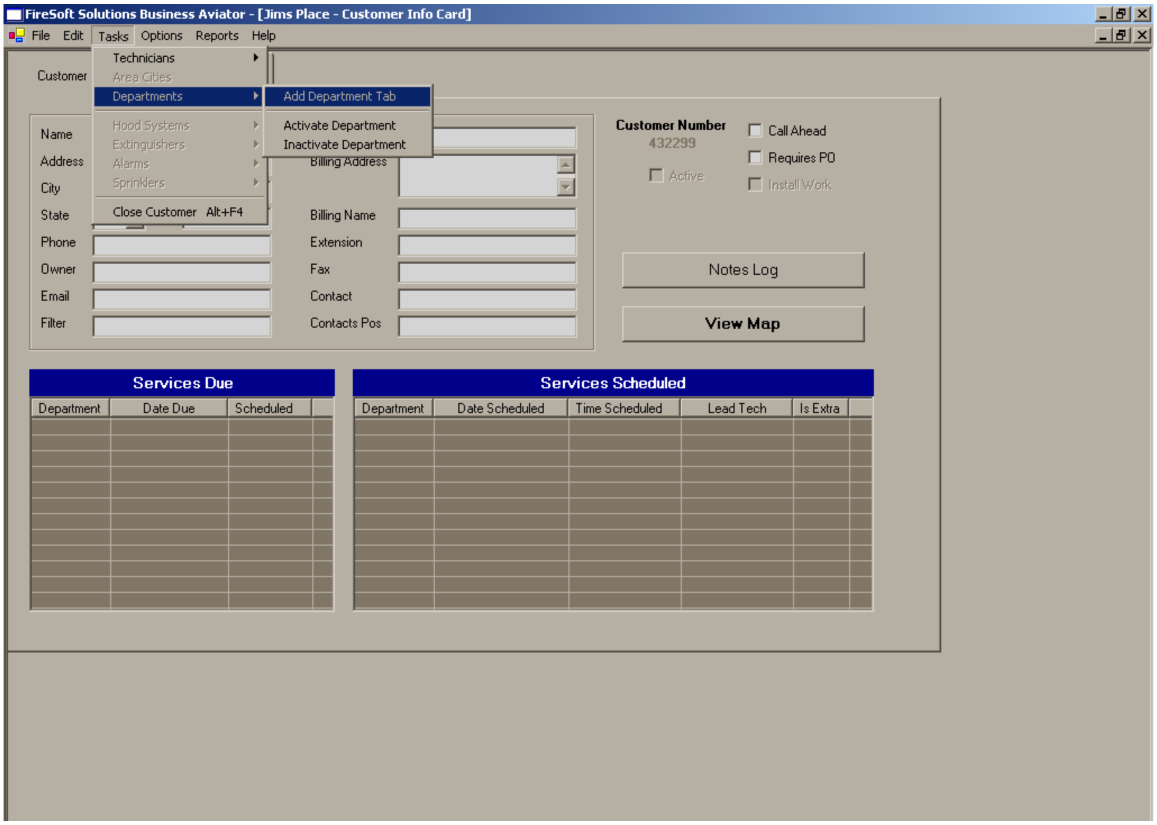
From the File menu, you can select to add a new customer to the system.



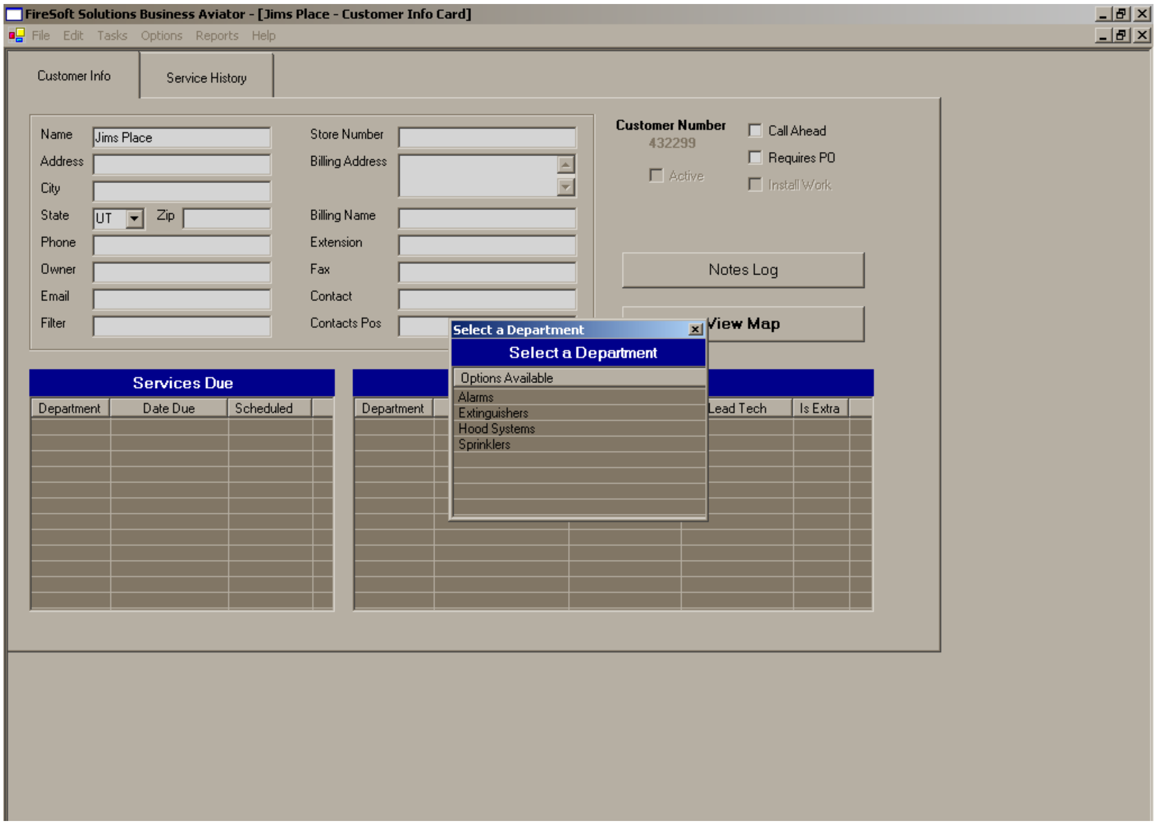
You will be prompted to enter a name for the customer. This is the only 'required' field for the customer at the time of demo release



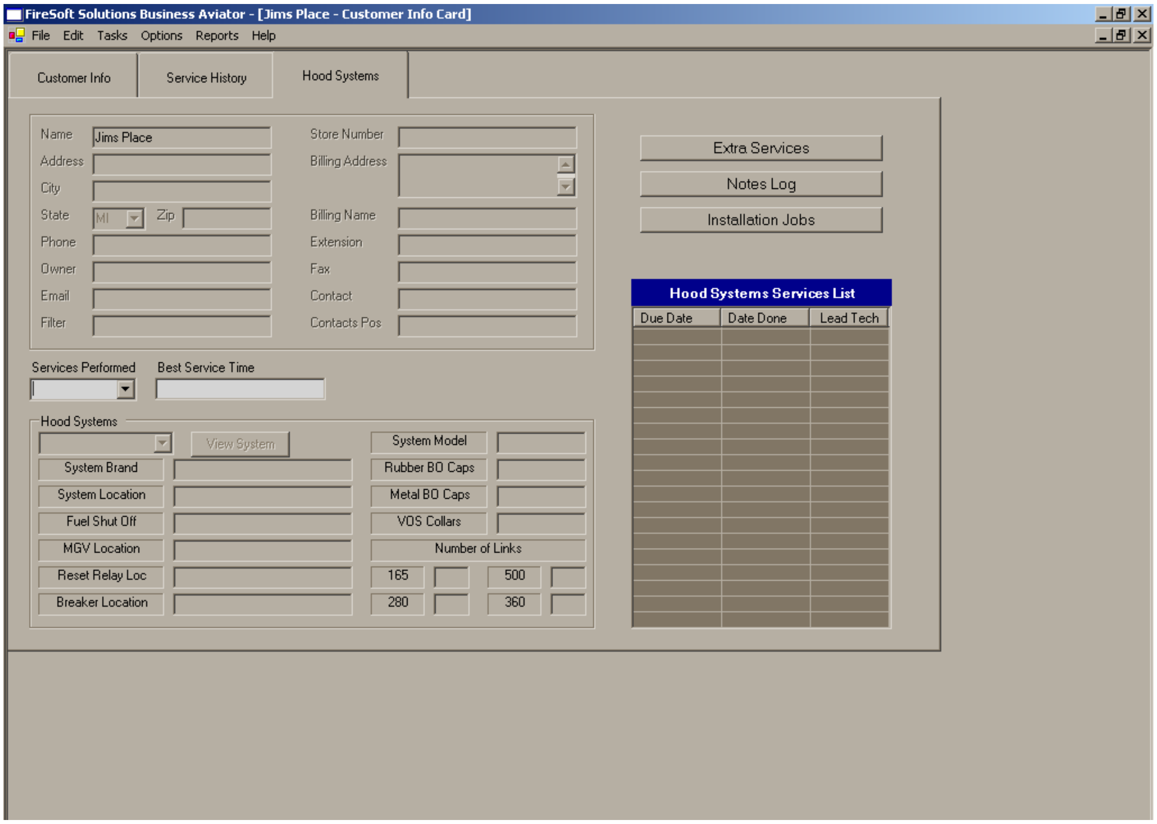
Once you have entered a name, you can edit address, phone number and other information. Next you will likely want to add a department to this customer. This is done from the Tasks menu.



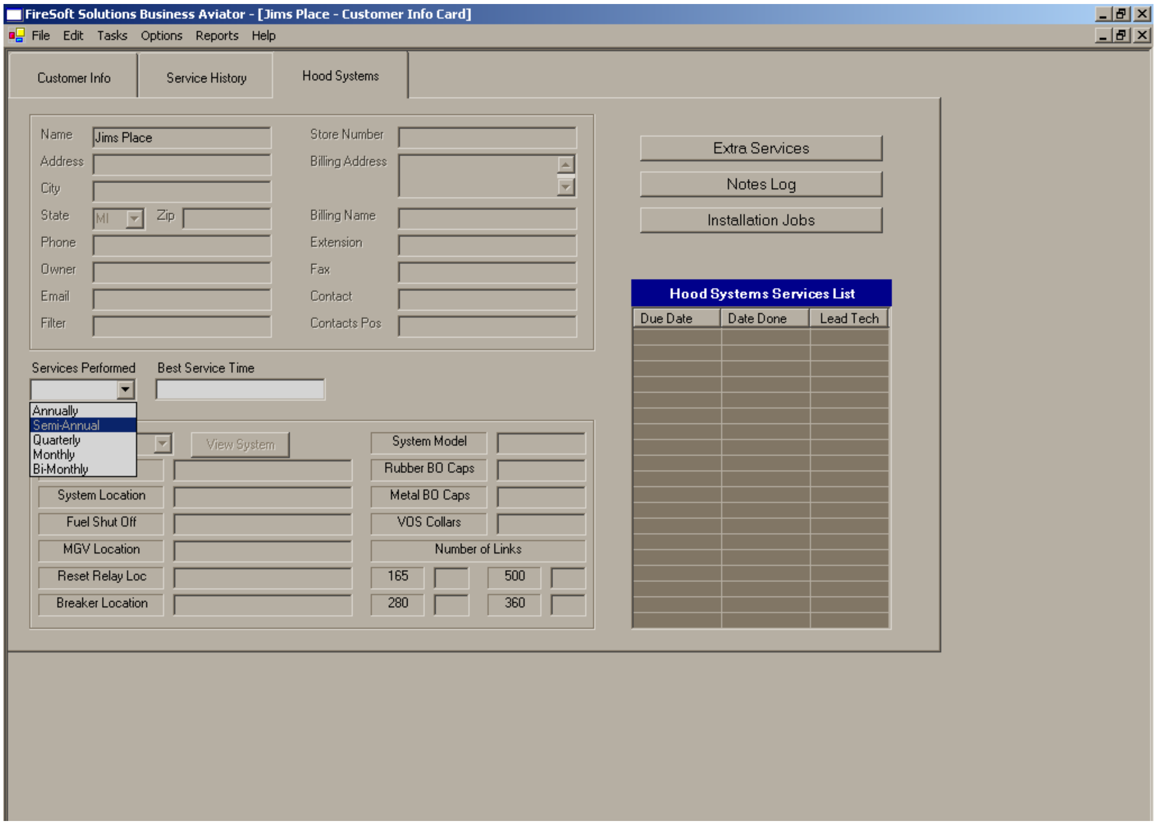
You will be prompted to select a department from the list of available departments. The departments listed in the demo may not be the departments in your company's customized application.



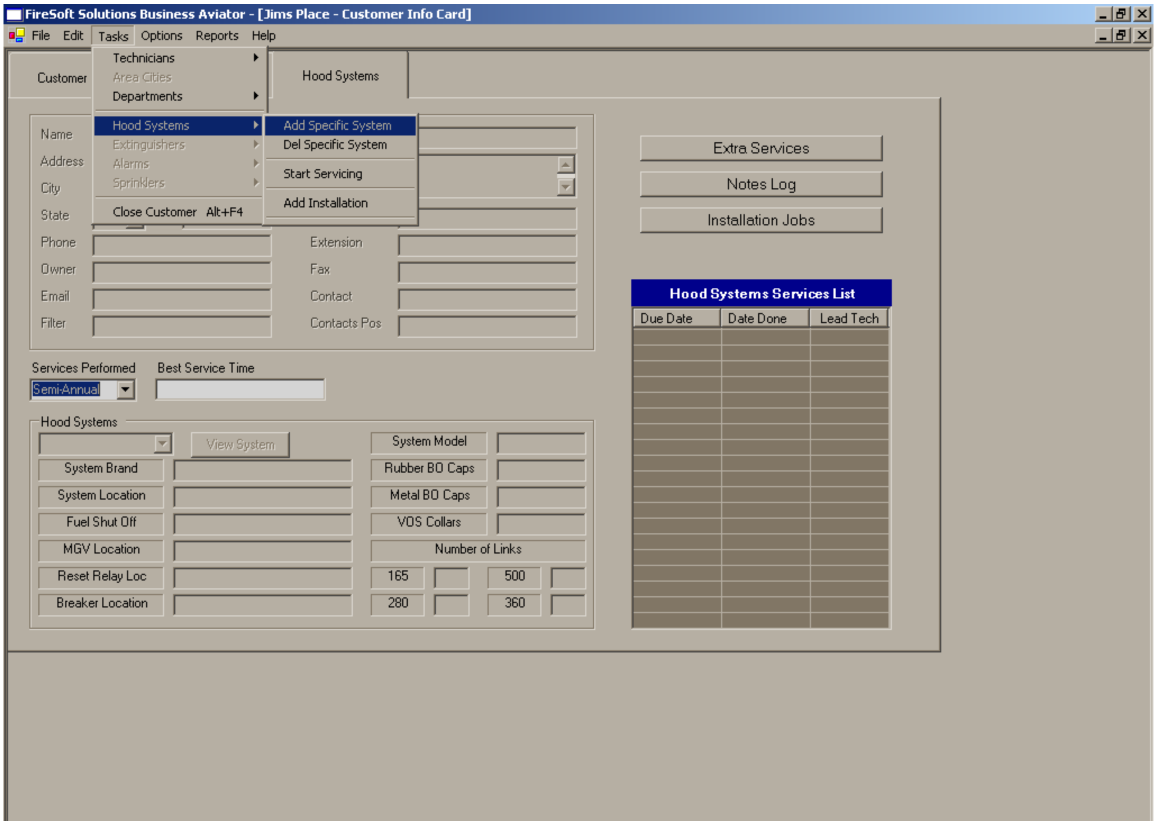
Once the department is added, you will see the departments tab appear on the customer card, and information on this tab will be empty.



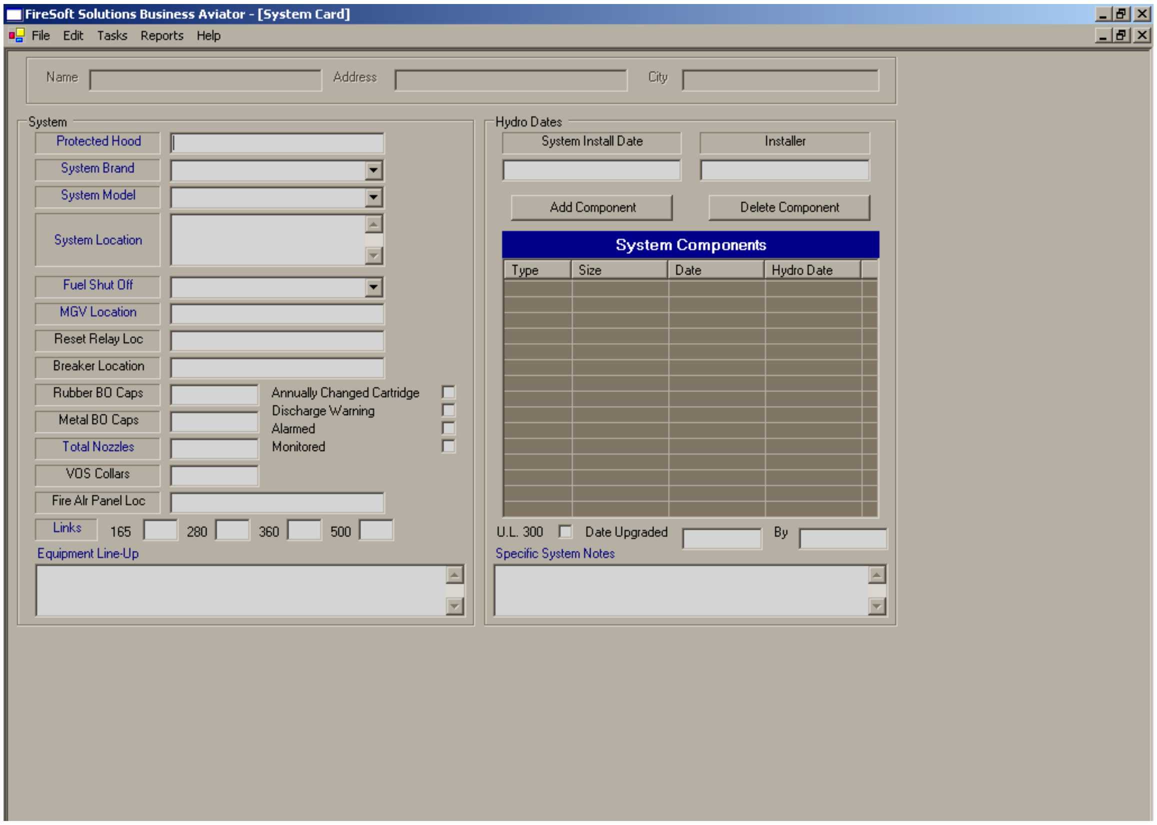
The first thing you may want to do is assign a service frequency to the customer, assuming the services performed are recurring and you know how often they need to be performed.



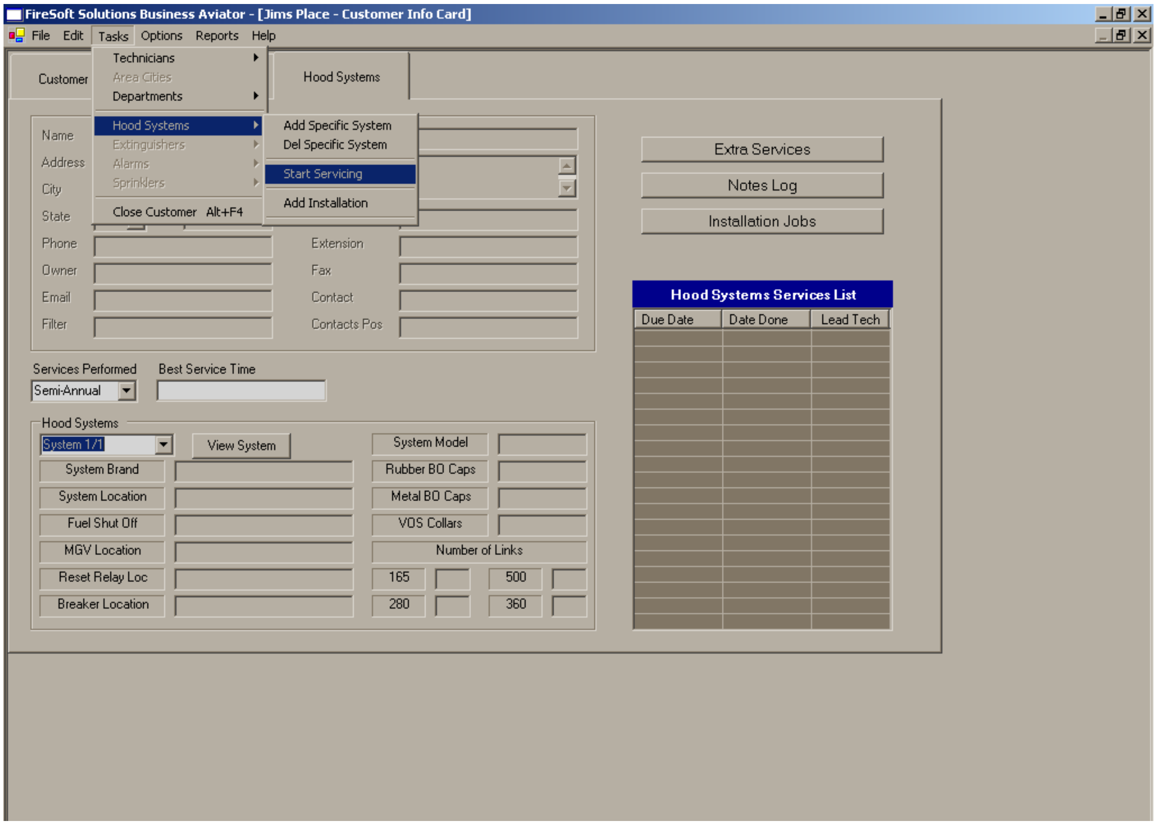
At this point you may want to add a specific system that you know the customer has, to record any information you have on the system. This is done from the tasks menu.



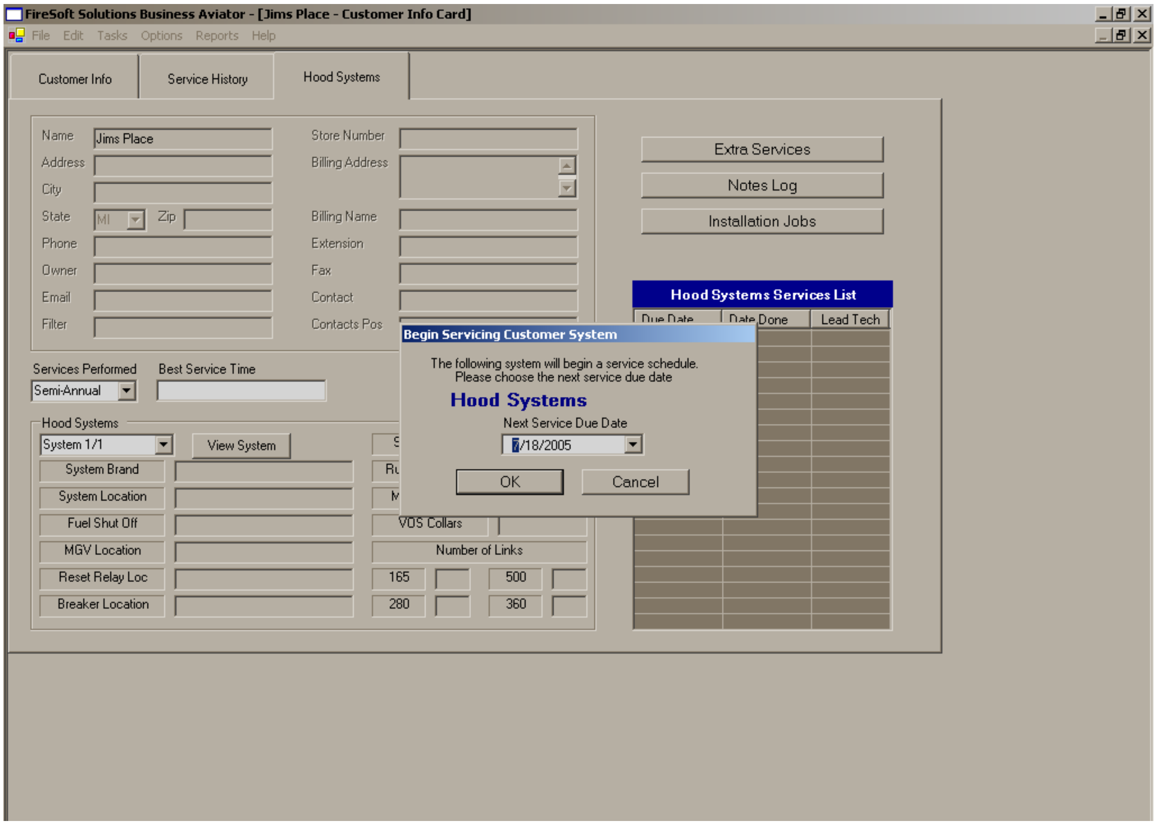
Each department will have specific information you are able to record. This information will be customized to fit your needs, and may not be the same as the information available for recording within the demo application.



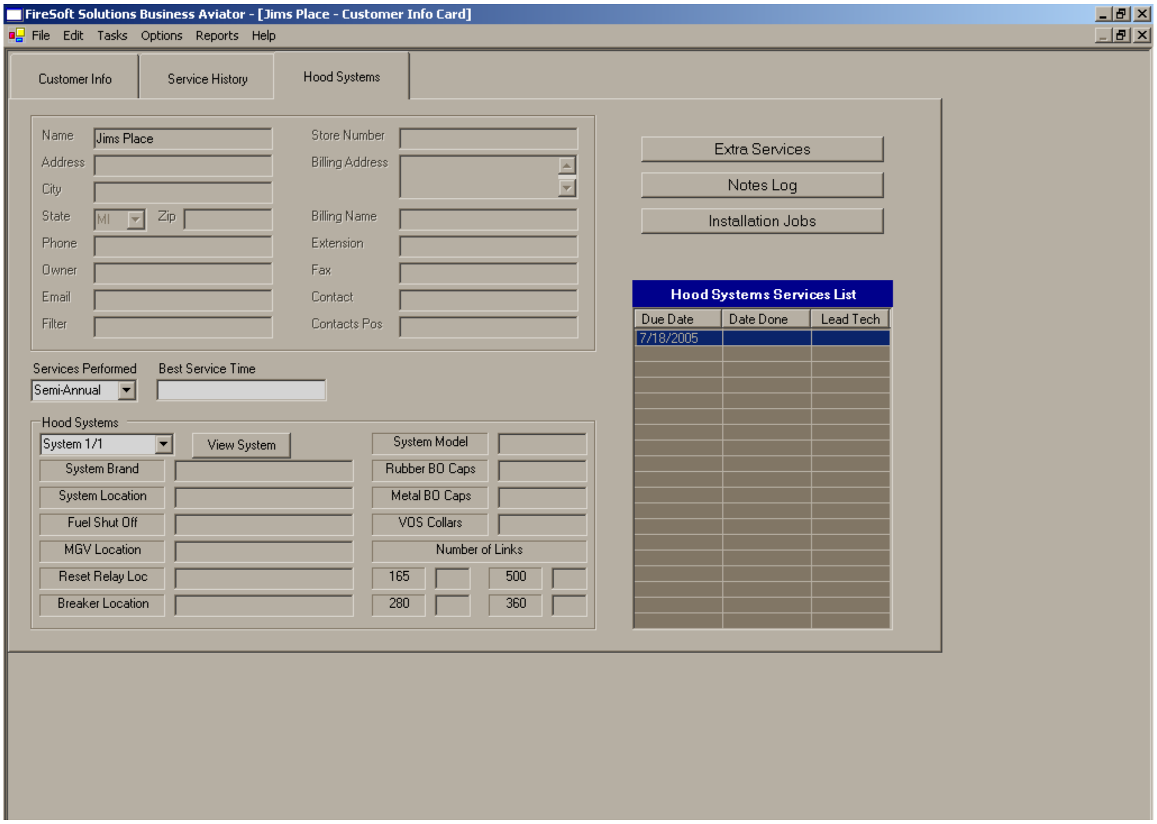
Once you have completed entering the information, or if you have skipped this part, you may want to begin services for the customer. This only has to be done once after you create a customer, or after a customer has been re-activated from a prior de-activation.



You will be prompted to choose the date this customer departments next service is due. If you don't know at this time, you can still click OK because it can be overridden at any time.

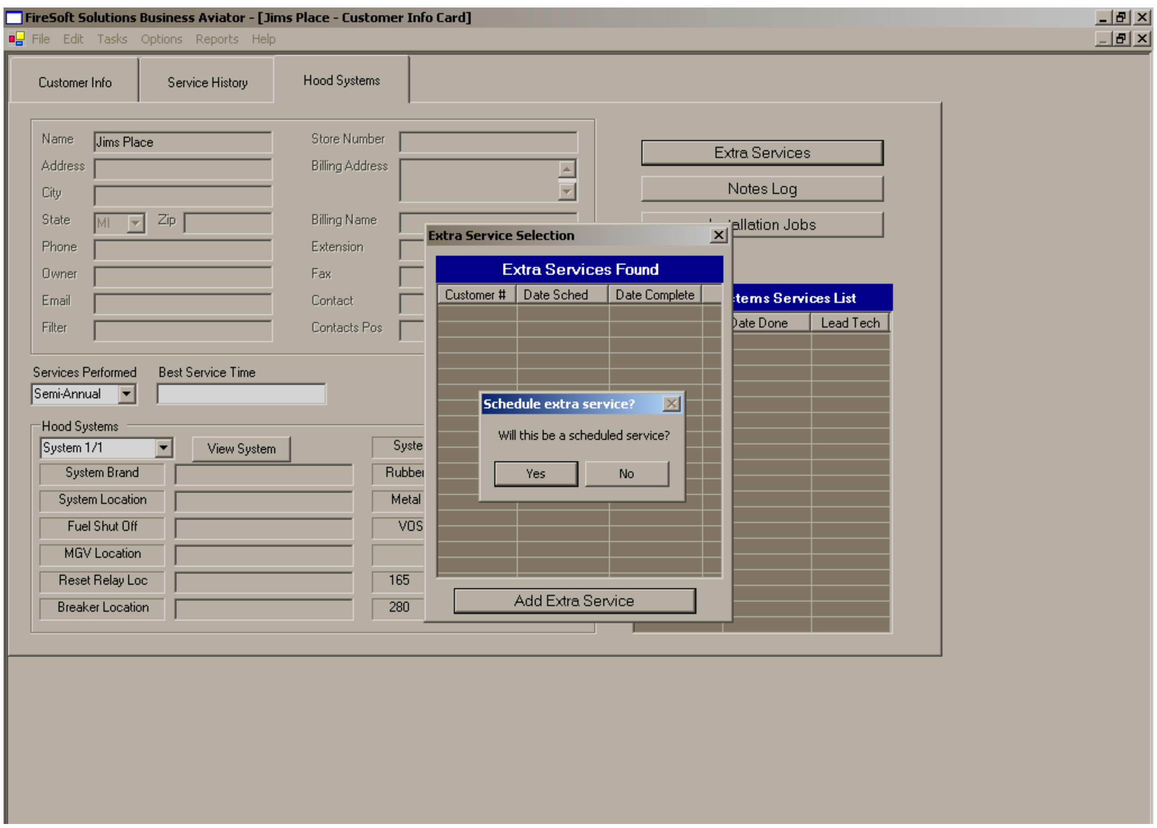


A recurring service schedule has now been established in this department. You'll see the first service due date appear in the services list.

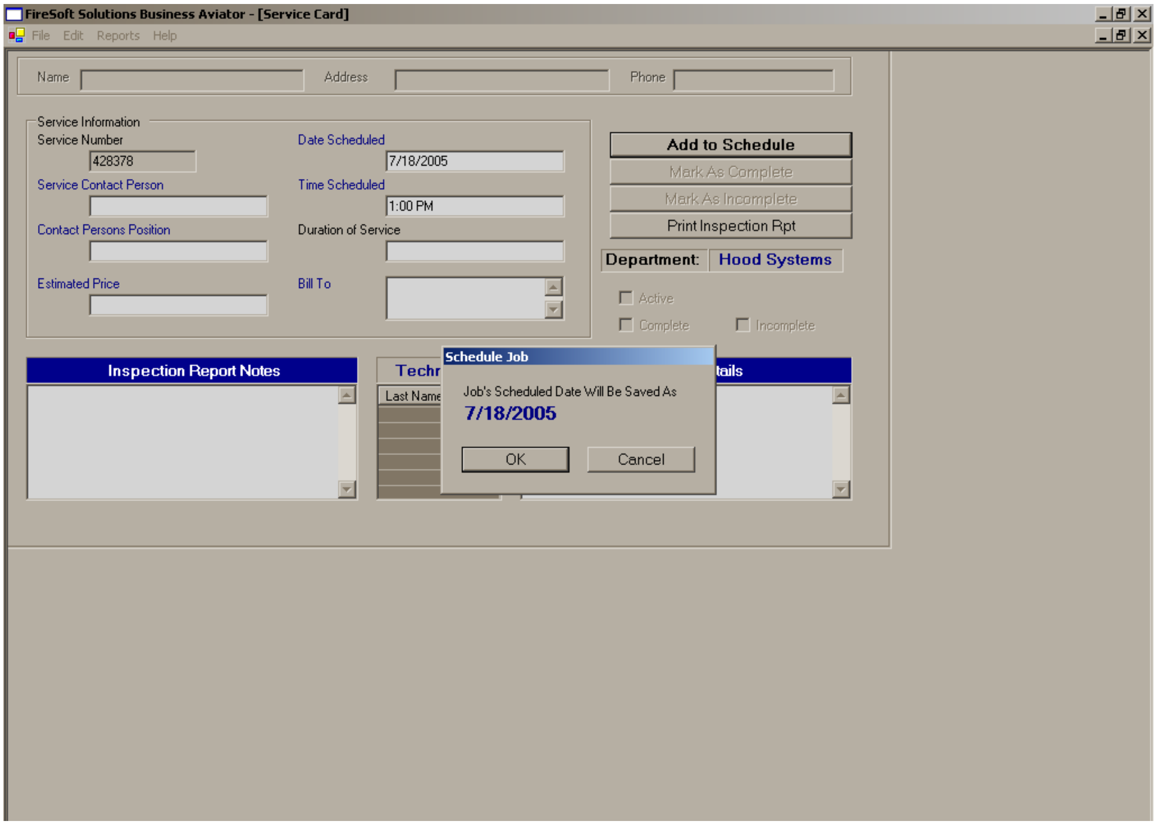


Extra services can be performed outside the normal service schedule in a department by clicking on 'Extra Services'. Most of the time, extra services include emergency services or immediate service requests for whatever reason.

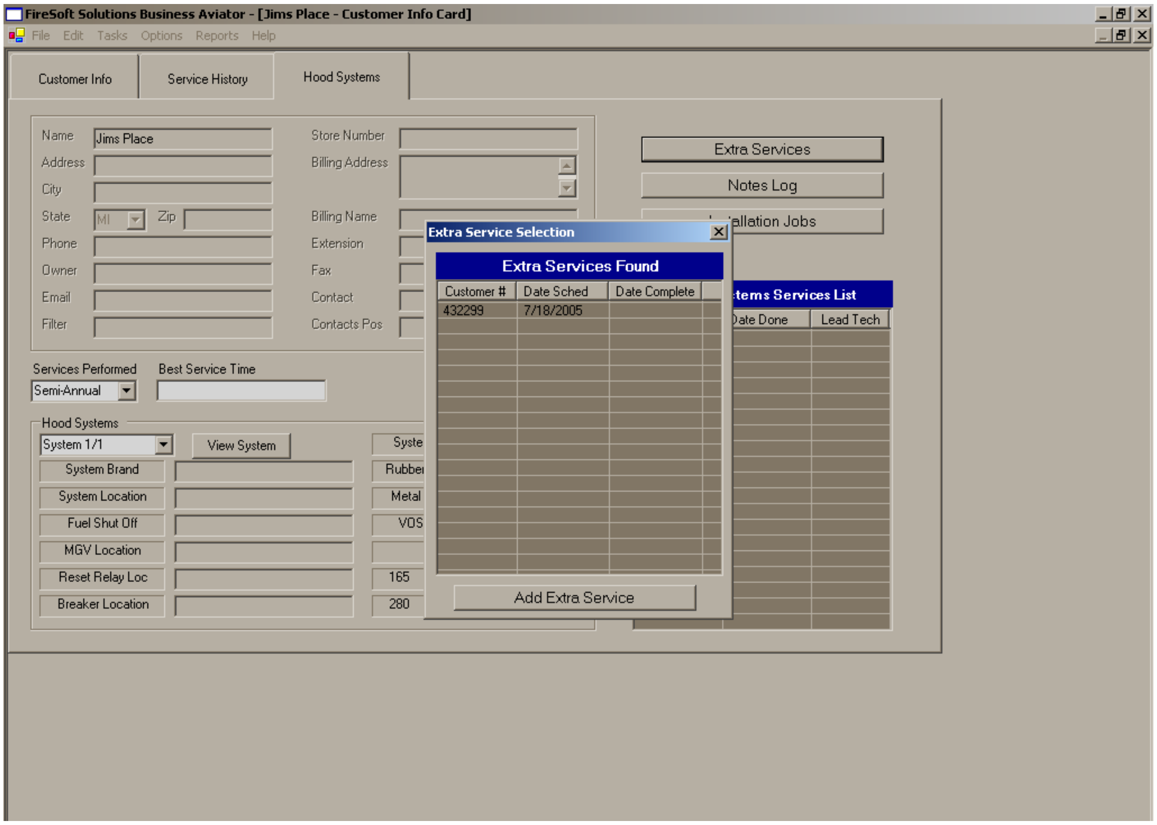
When 'Add Extra Service' is chosen, you will be prompted to specify whether this is a scheduled service or not. If the service is to be performed at a later date (it is being scheduled) you could choose to schedule the service by choosing 'Yes'; if the service needs immediate attention, you may want to record the service without adding it to the schedule, in this case you would choose 'No'.



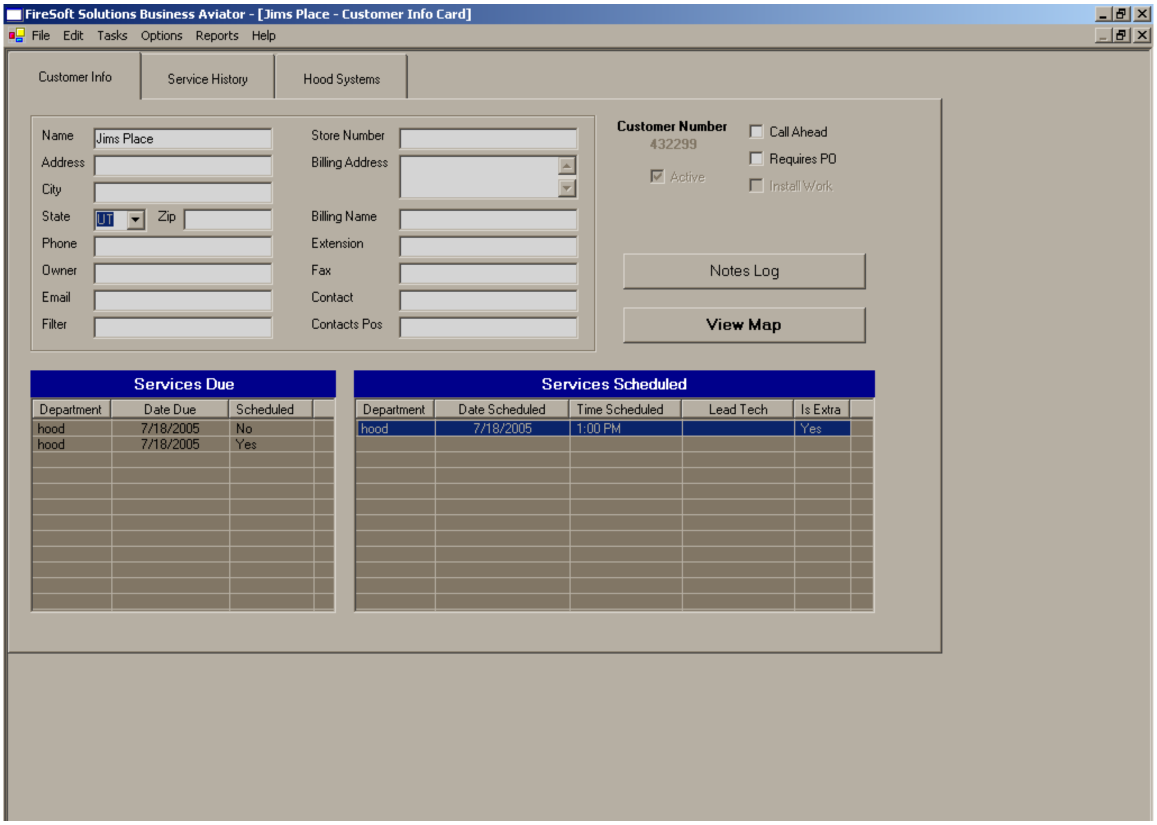
We chose to schedule the service in this case. After entering the date and time the service is to be scheduled, clicking 'Add to Schedule' prompts for verification.



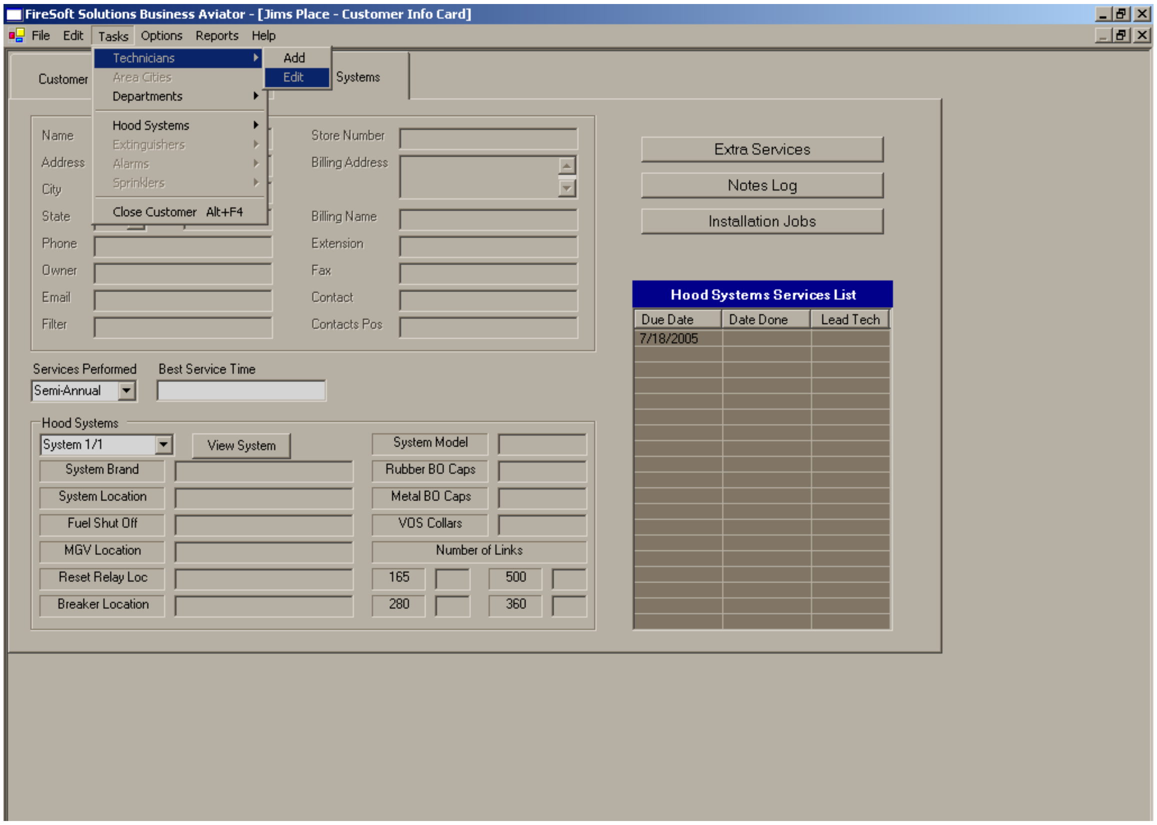
When opening extra services again, we can see that this extra service has been scheduled outside of the normal service schedule, and it is not yet completed.



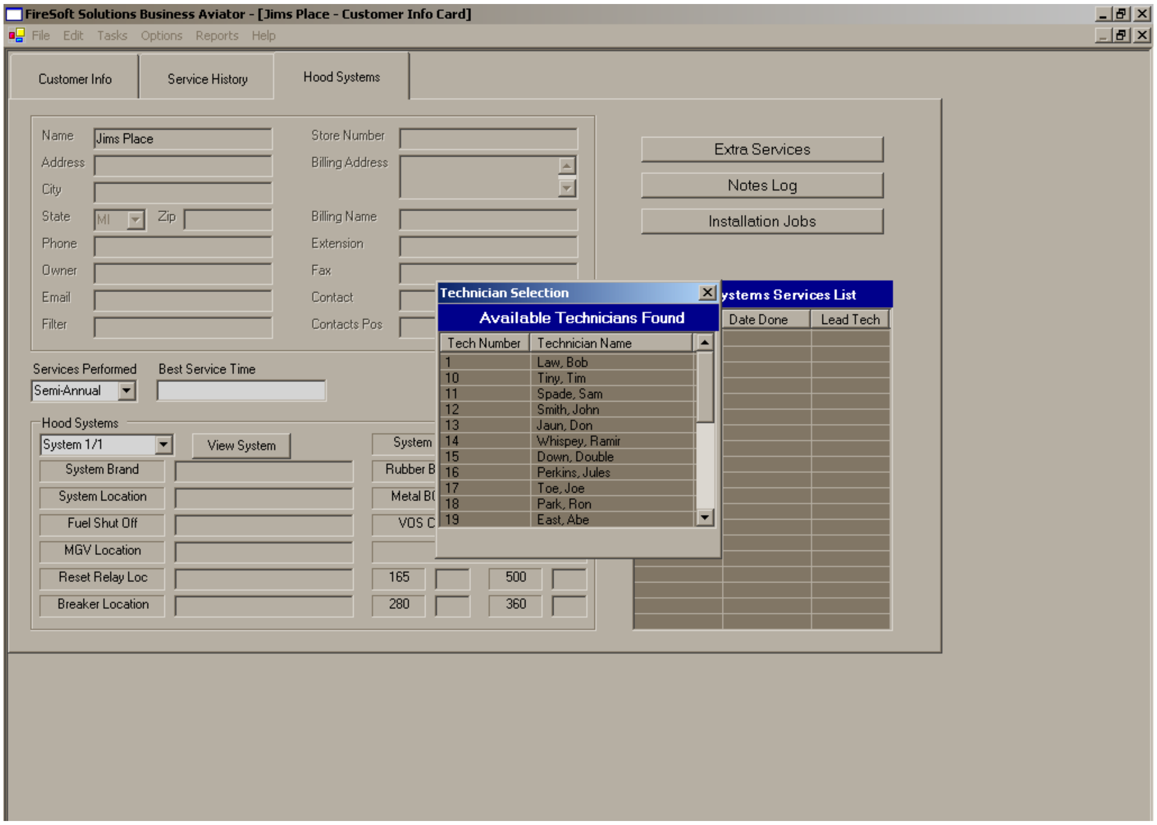
By clicking on the Customer Info tab, we also can see this service listed in the scheduled services section, along with information that it is an Extra Service.



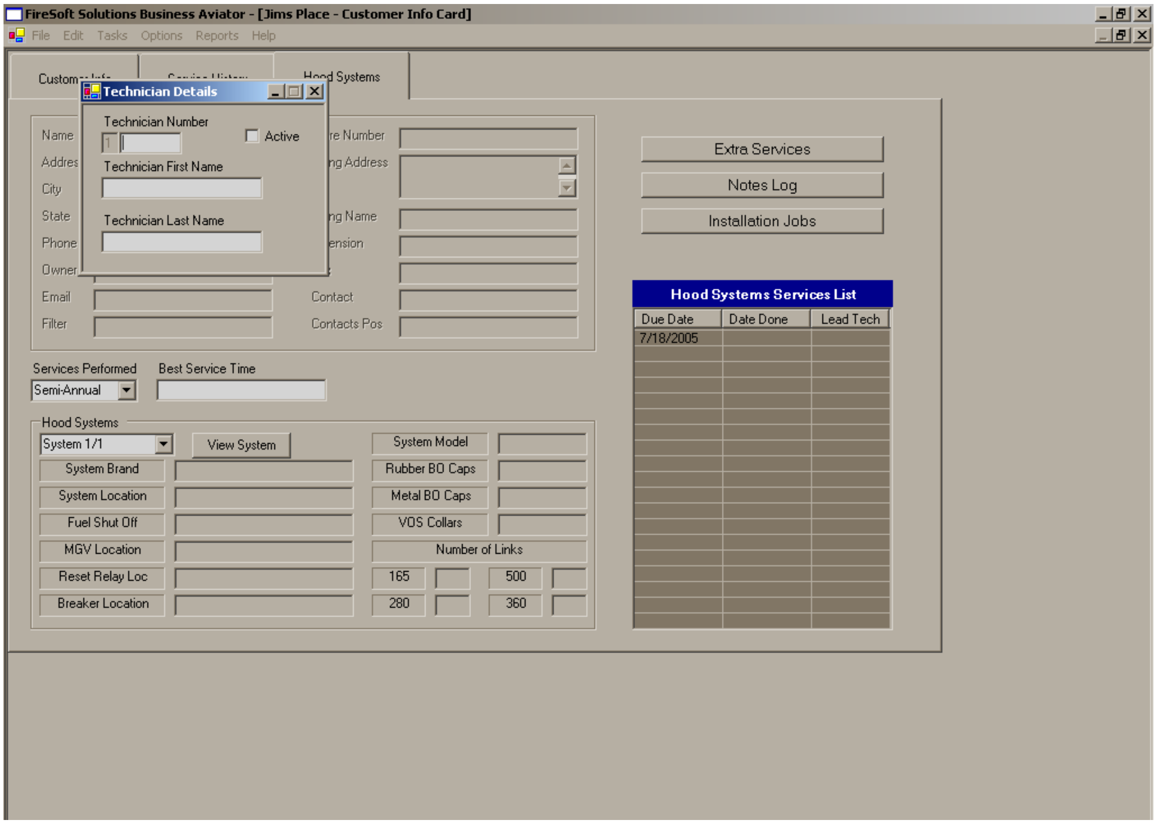
Technicians can only be manipulated when the department tab for which the technicians exist is selected. Once selected (Hood Systems tab is selected in this case) the Technicians can be manipulated from the tasks menu.



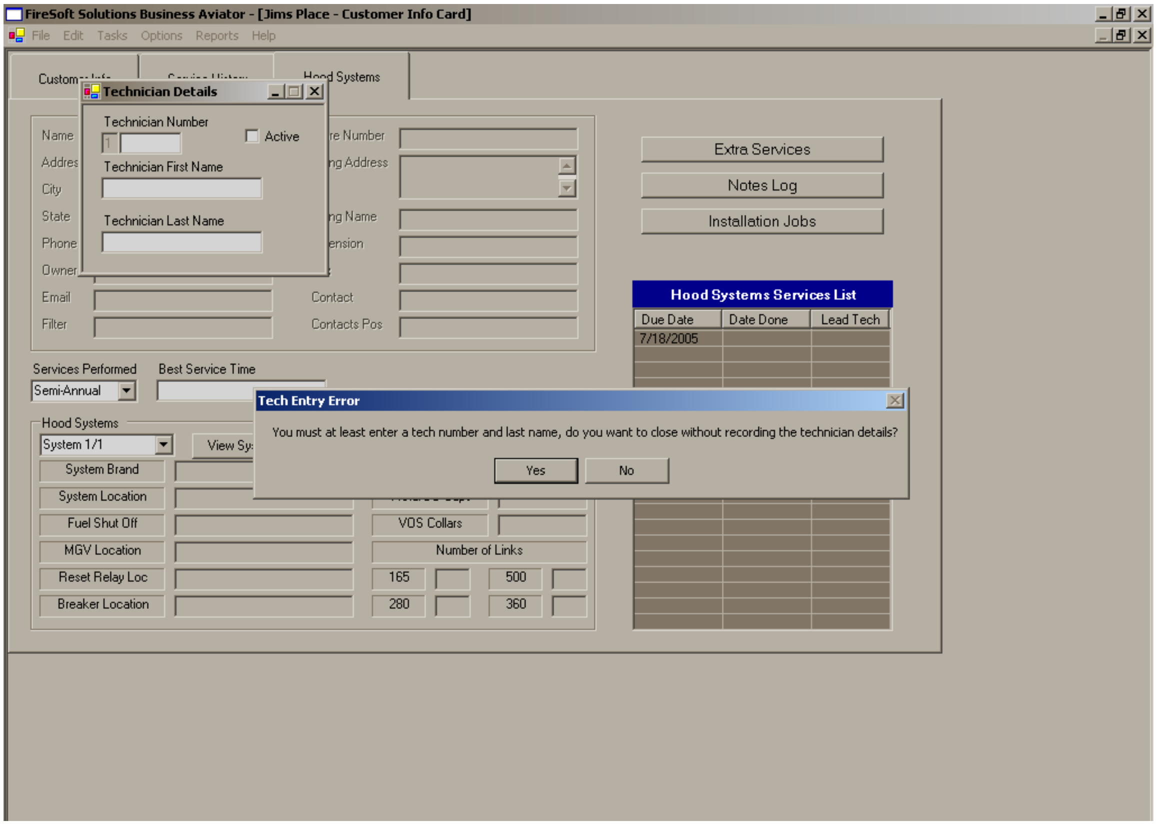
Choosing to edit technicians in the department provides a list of currently available technicians to select from. From here, the technician is selected and any modifications can be made.



Choosing to add a new technician in the department displays a blank technician information form.

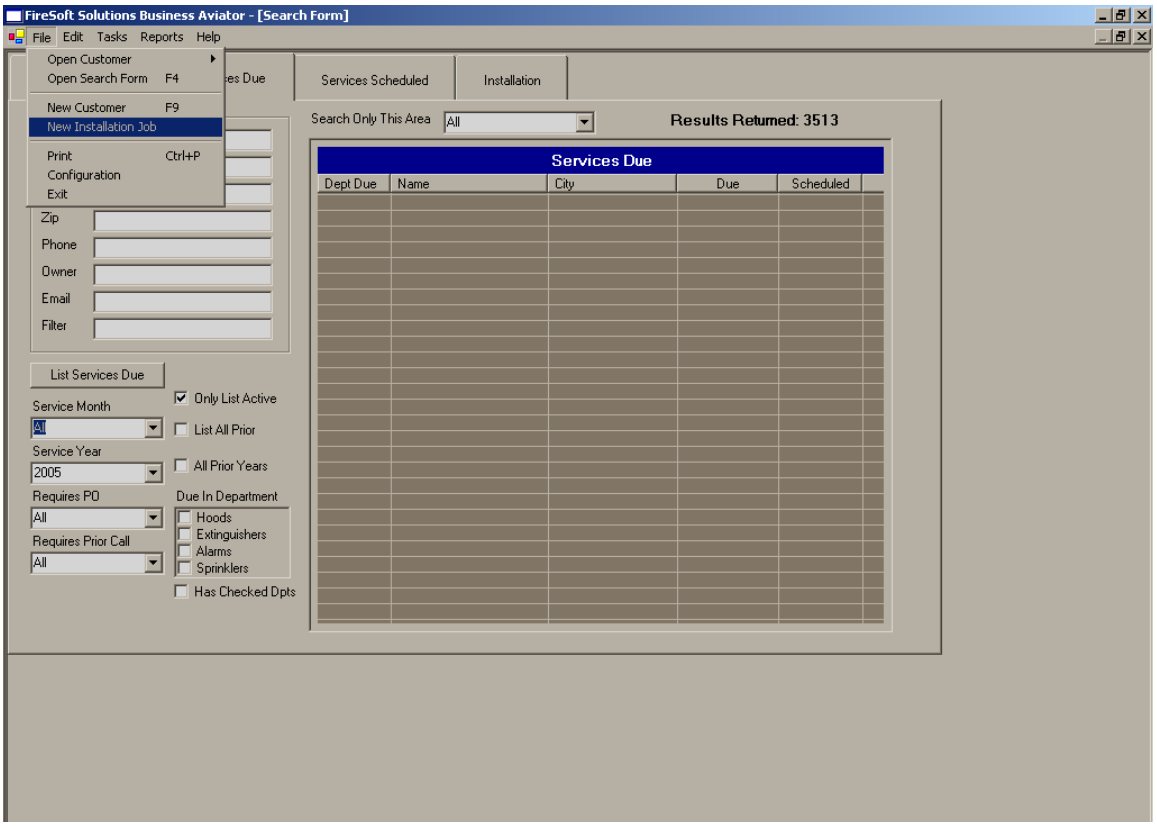


Like any other record addition in the system, if the required information is not entered, you will be notified and provided an option to correct this or discontinue record addition.

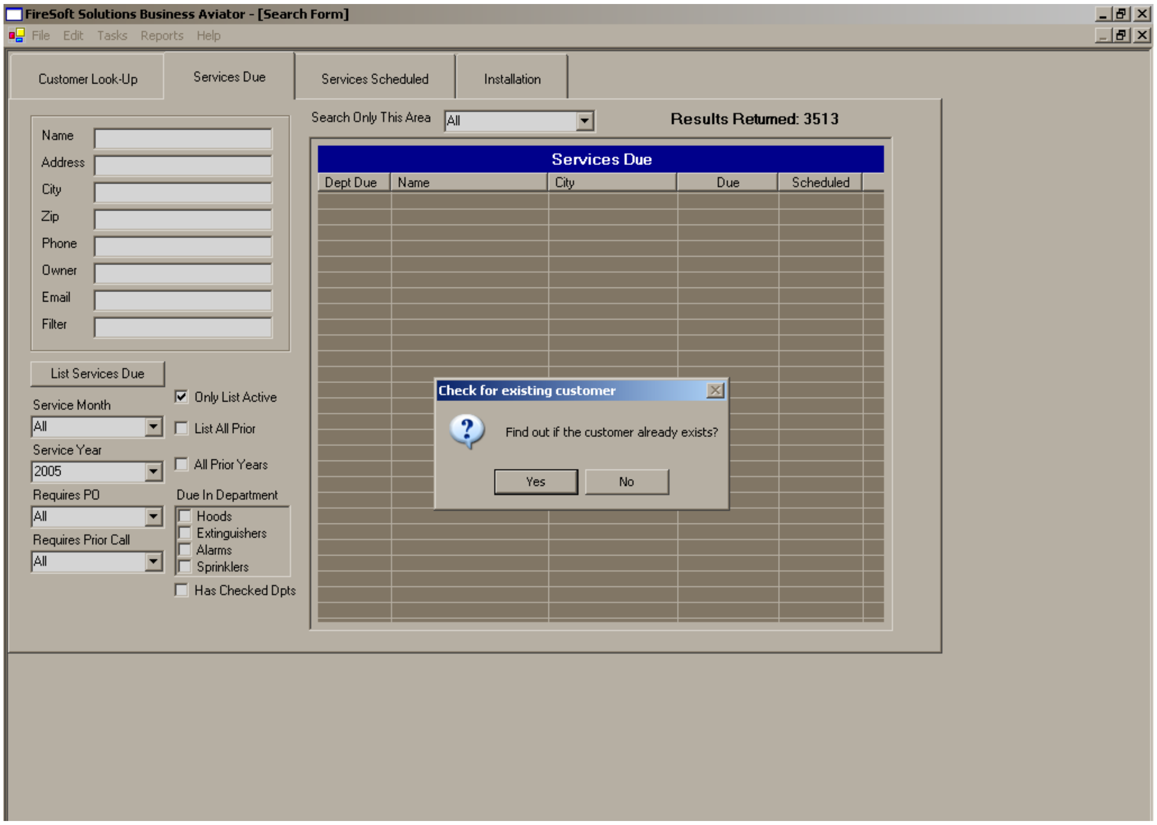


Adding a new Installation Job

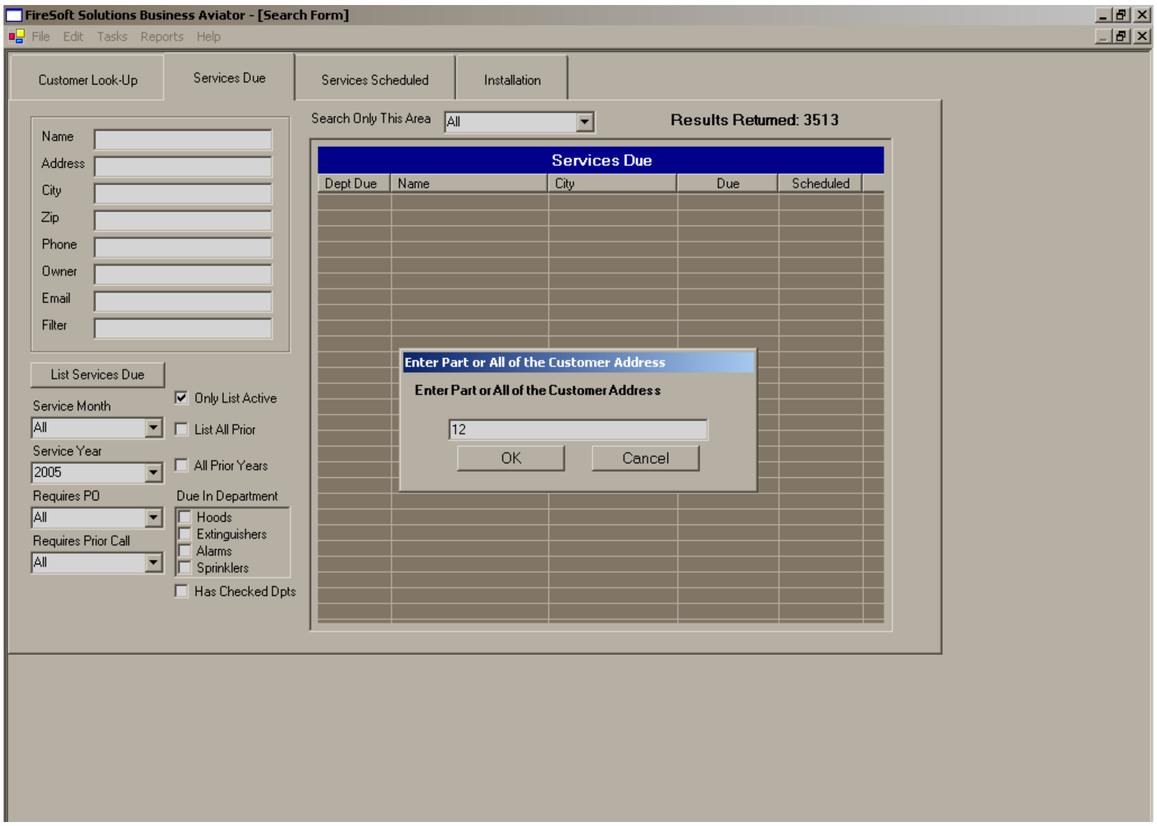
From the File menu, you can select to add a new installation job to the system. Installations can be customized to be available to every department for which you perform and desire to manage installations. In the demo, only the Hood Systems department has installations management available.



You will be prompted to find out if the customer for which you are adding the installation already exists in the database. Generally you will want to choose 'Yes' just to make sure, unless you are positive this installation is not for someone that was previously serviced by your company.

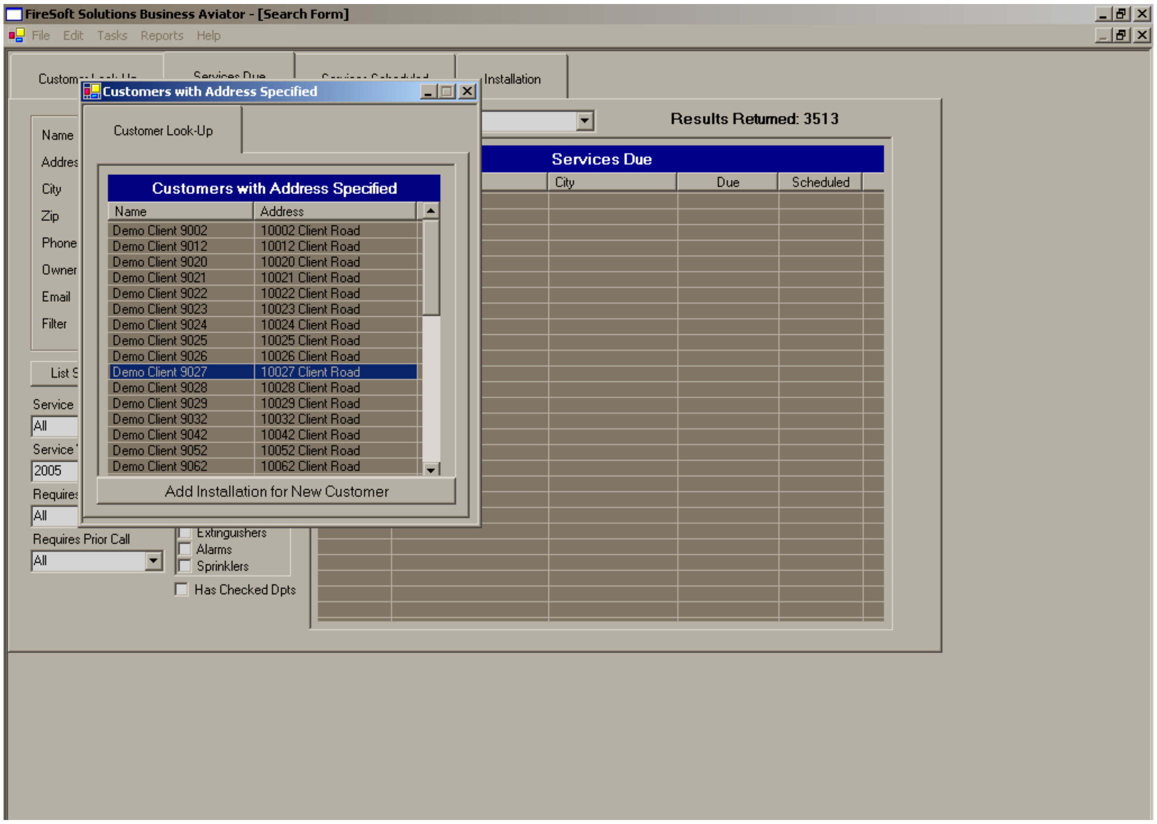


If you choose to find out if the customer exists, you will be prompted to enter part of the customer's address to locate them. The address entered does not have to be full, and it is best if you only enter a portion of the address to make sure someone else didn't enter the address slightly different (i.e. with Rd. at the end instead of Road)



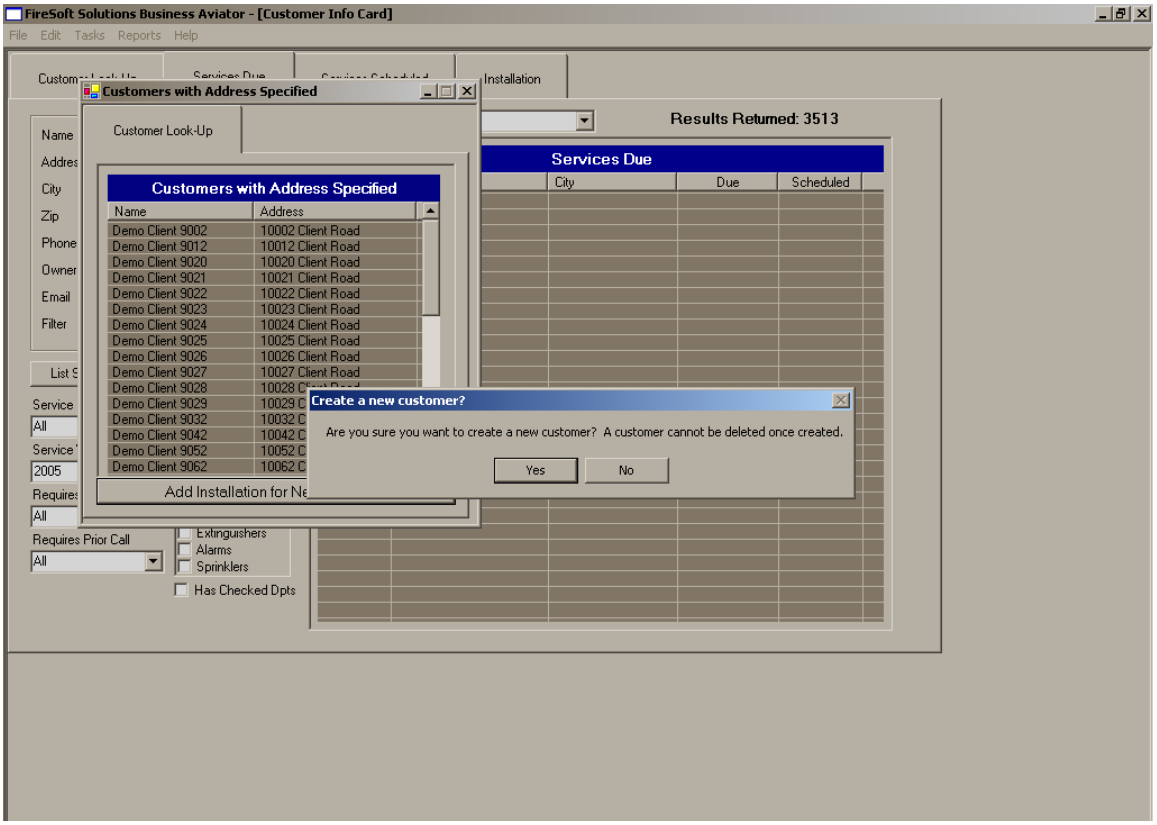
In this example, we just enter two digits of the address.

We are then provided a list of all the customers that have an address containing these two digits to select from.

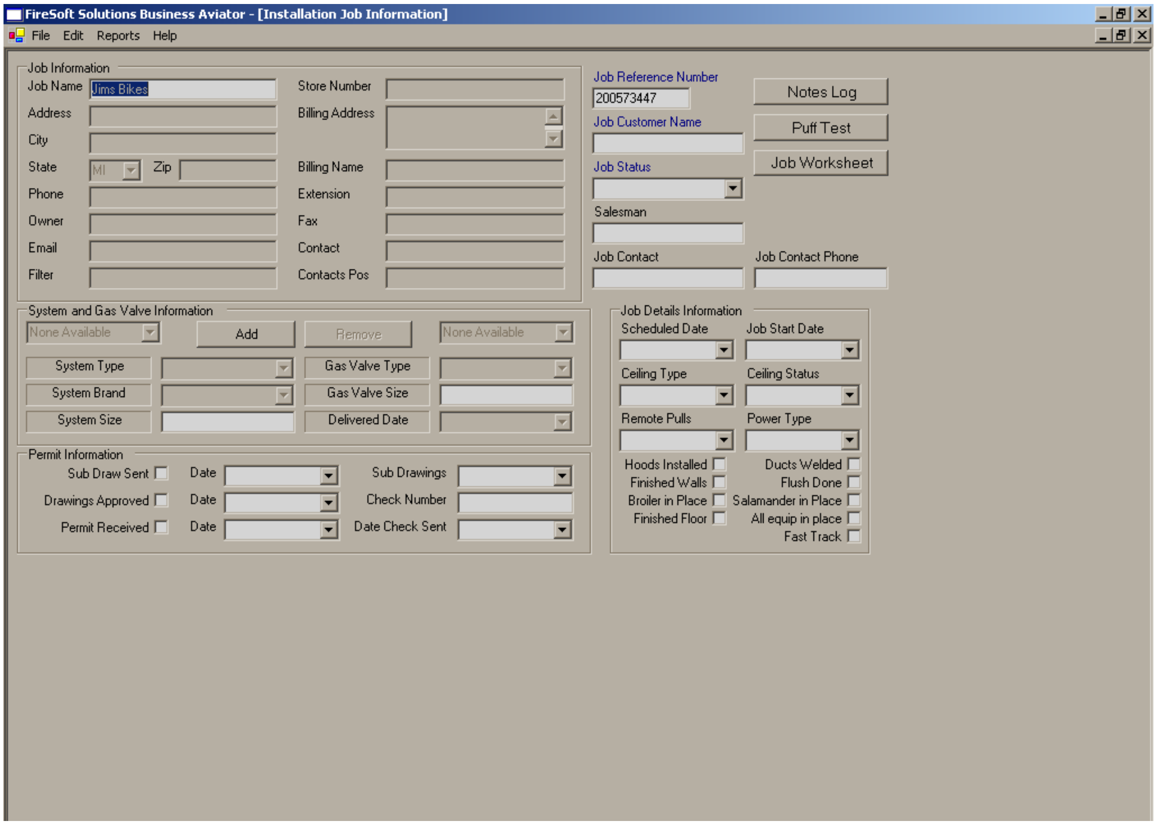


In this case, we may have wanted to be more specific with the address to avoid such a large list of customers.

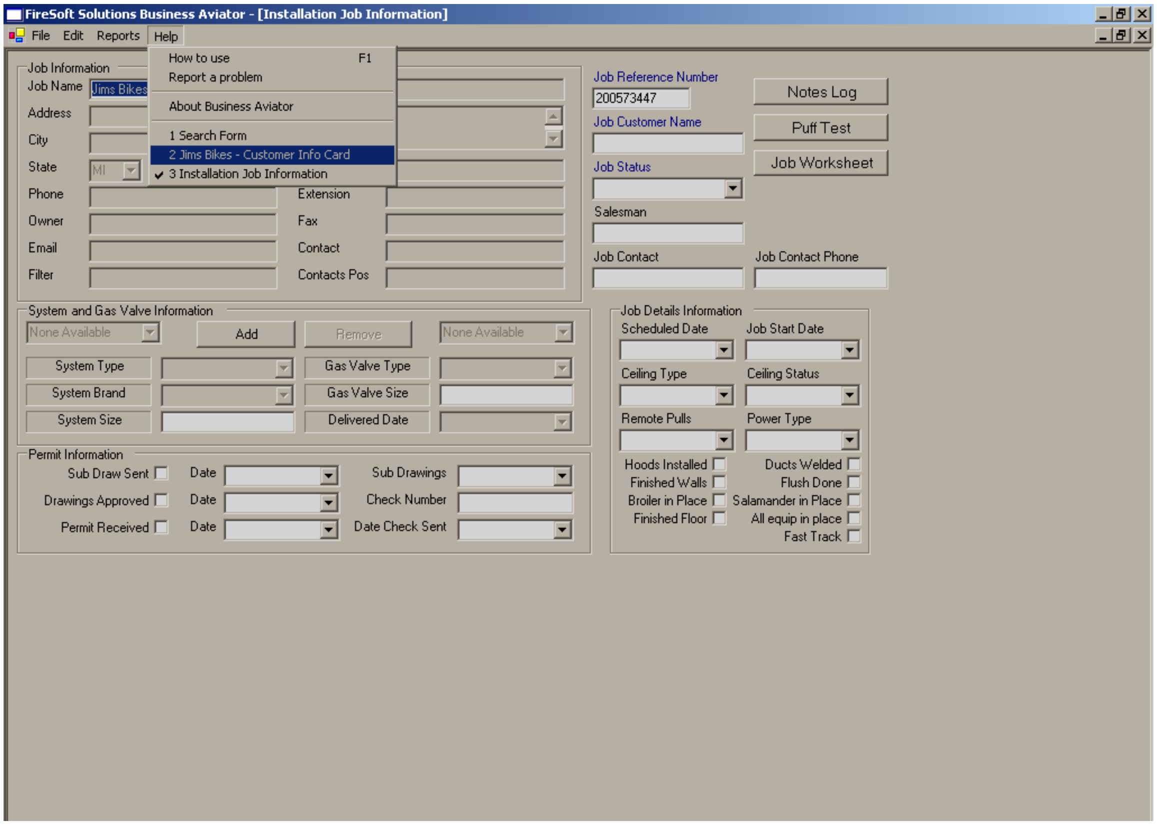
At this point, if the customer is not in the list, we would choose 'Add Installation for New Customer.' You will go through the same process we used to create a customer, with one exception. The department tab for which we added the install will be automatically added to the customer.



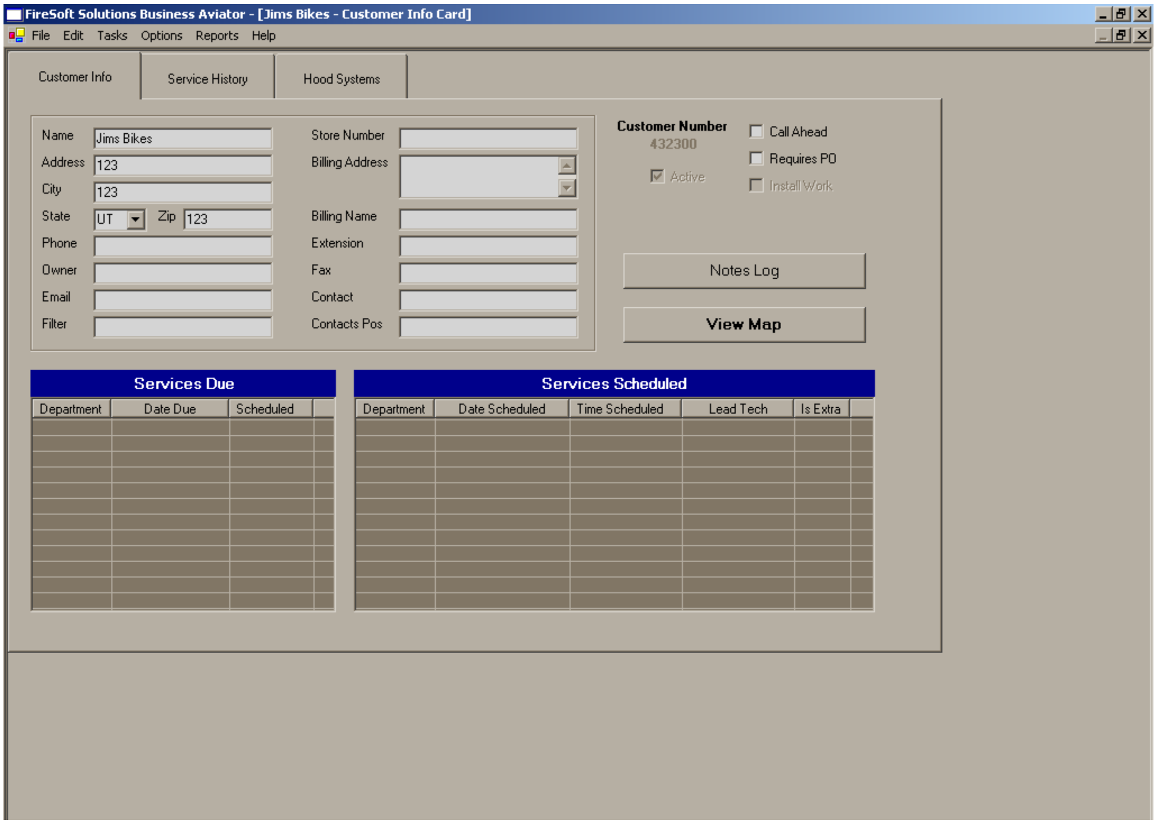
The installation job information will be displayed first. You will notice that none of the address or general customer information can be added or modified from here.



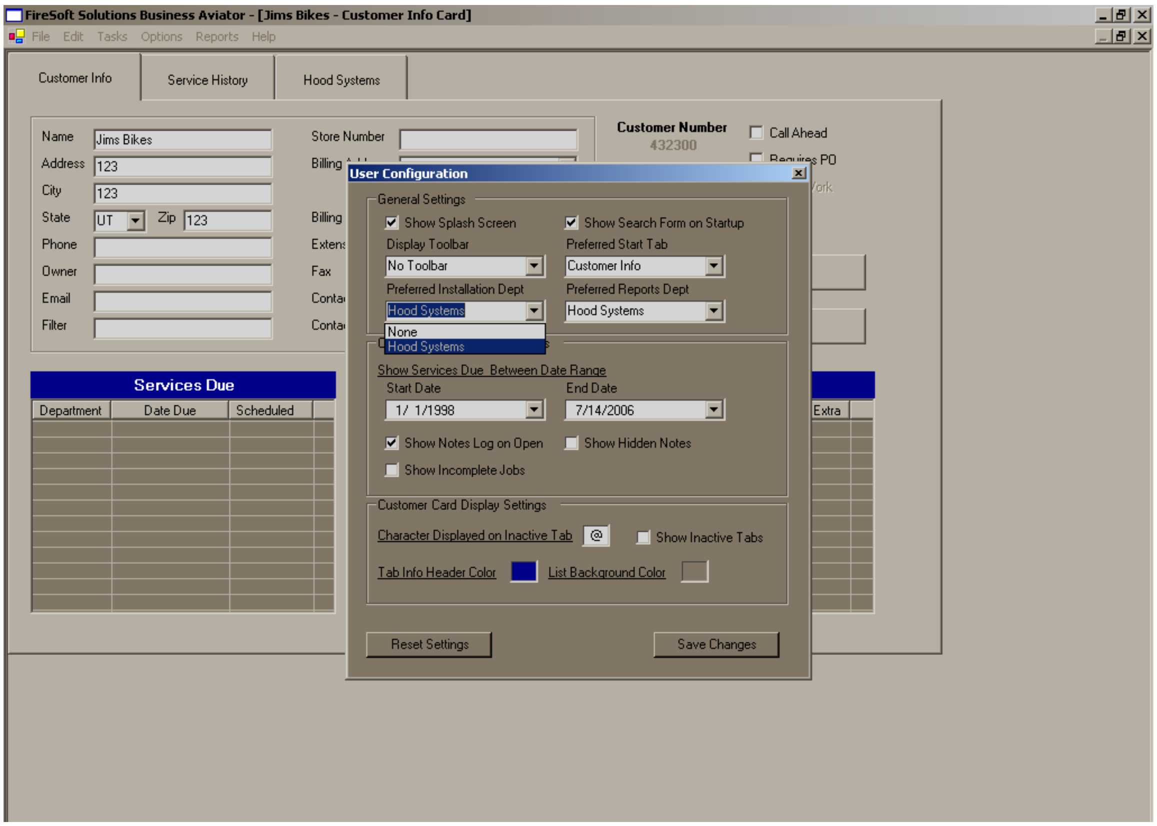
The customer card window opened along with the installation card window, and we can choose the customer card window at this point if we desire to enter the customer's general information.



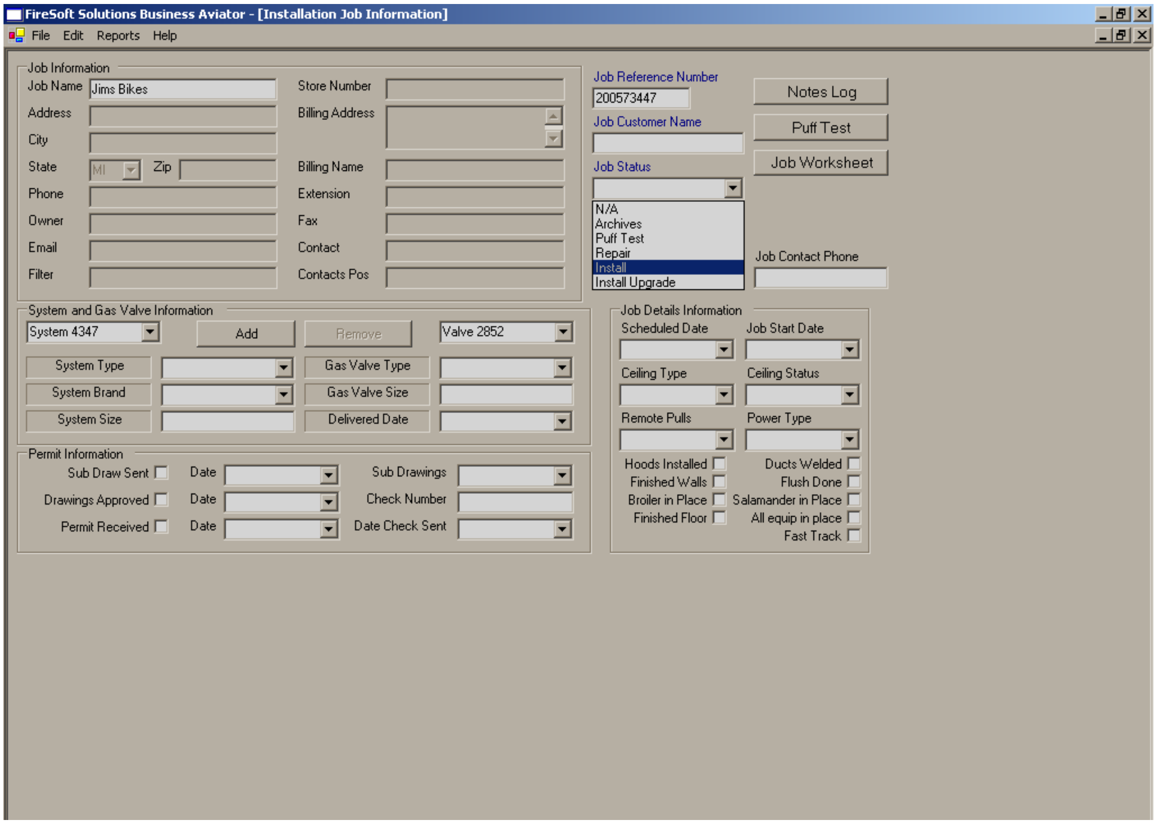
Once the general information has been entered, the customer card can be closed and you can continue working with the installation.



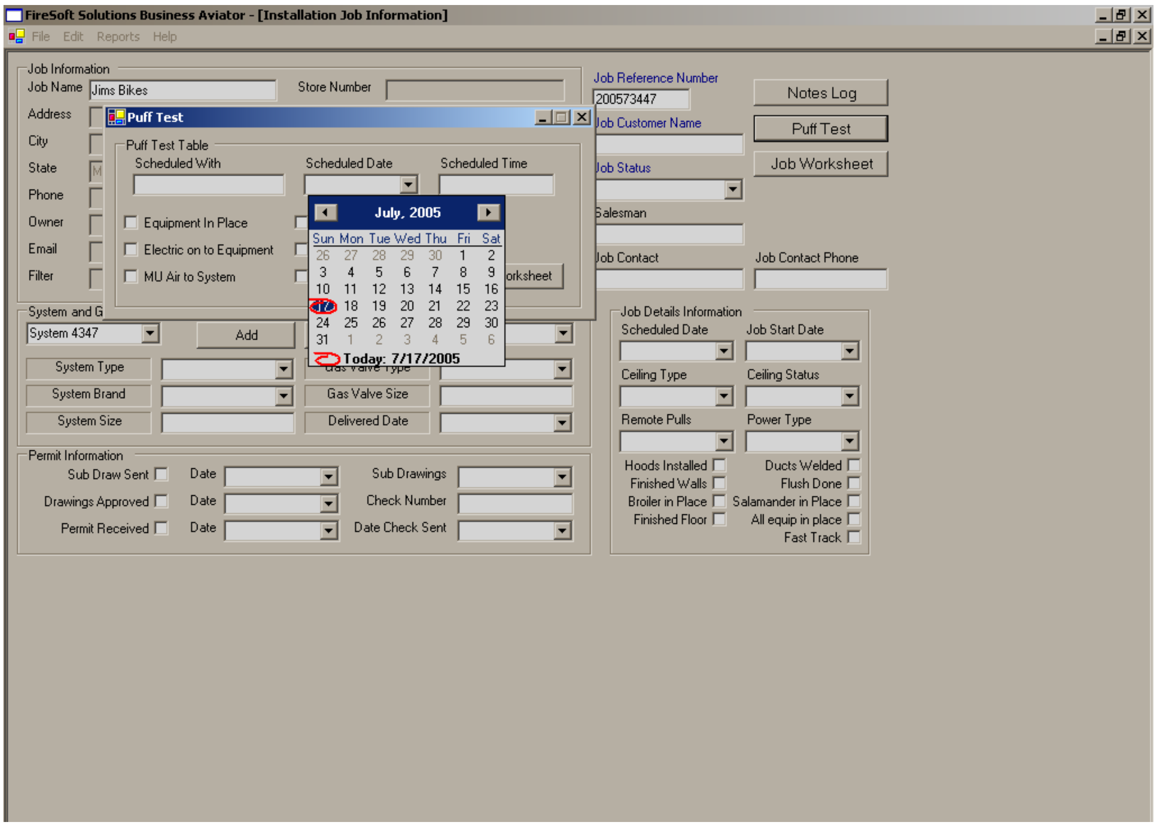
Under the configuration options, you will notice a 'preferred installation department'. Selecting the department for which you personally manage the installations gives you the ability to choose 'Add New Installation' from the file menu to add a new installation for this department. Currently if the default option of 'None' is chosen, you will receive a message preventing you from adding installations in this manner.



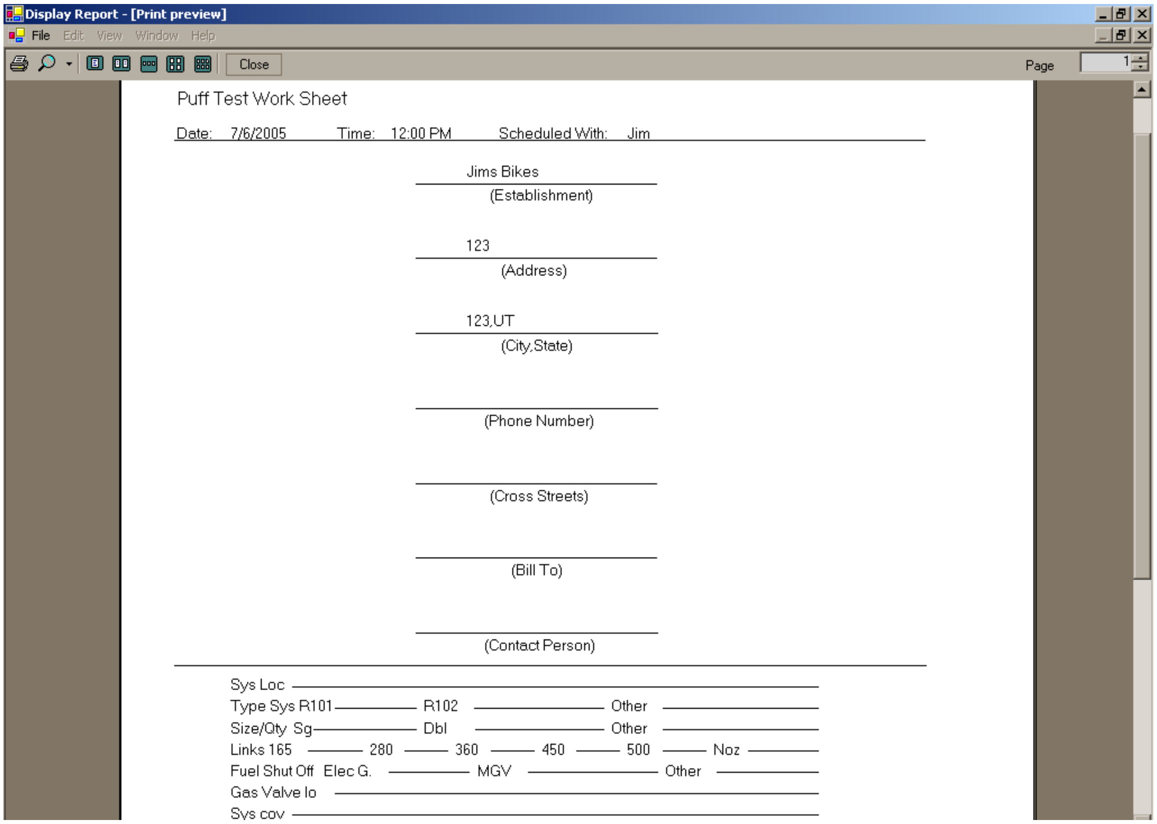
In our example, we added a system and gas valve to the installation, and choose the status: Install from the dropdown.



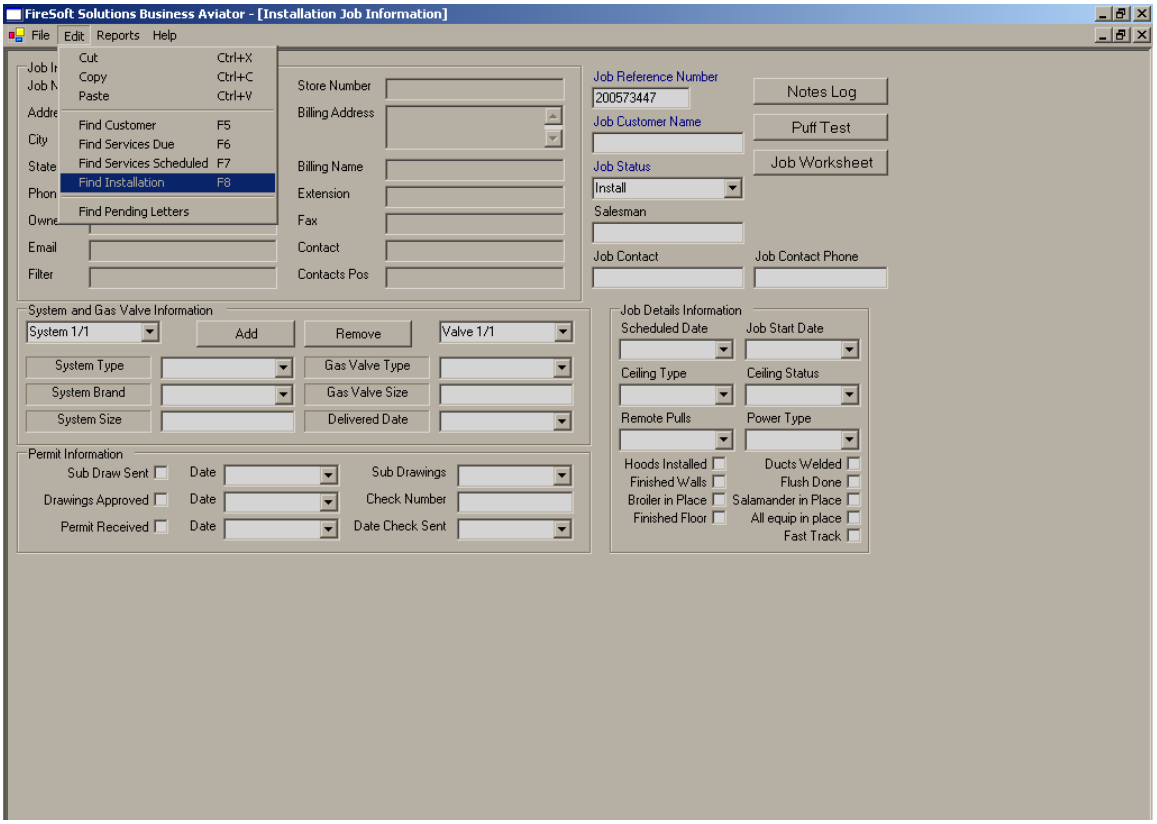
Clicking ‘Puff Test’ will display a list of puff tests performed in our case, and will allow us to manage the status of the puff test and date it is scheduled. Obviously this may not apply to your department, but it’s a good example of additional management operations added to a department’s installations.



This particular puff test has its own custom report called the ‘Puff Test Worksheet’.

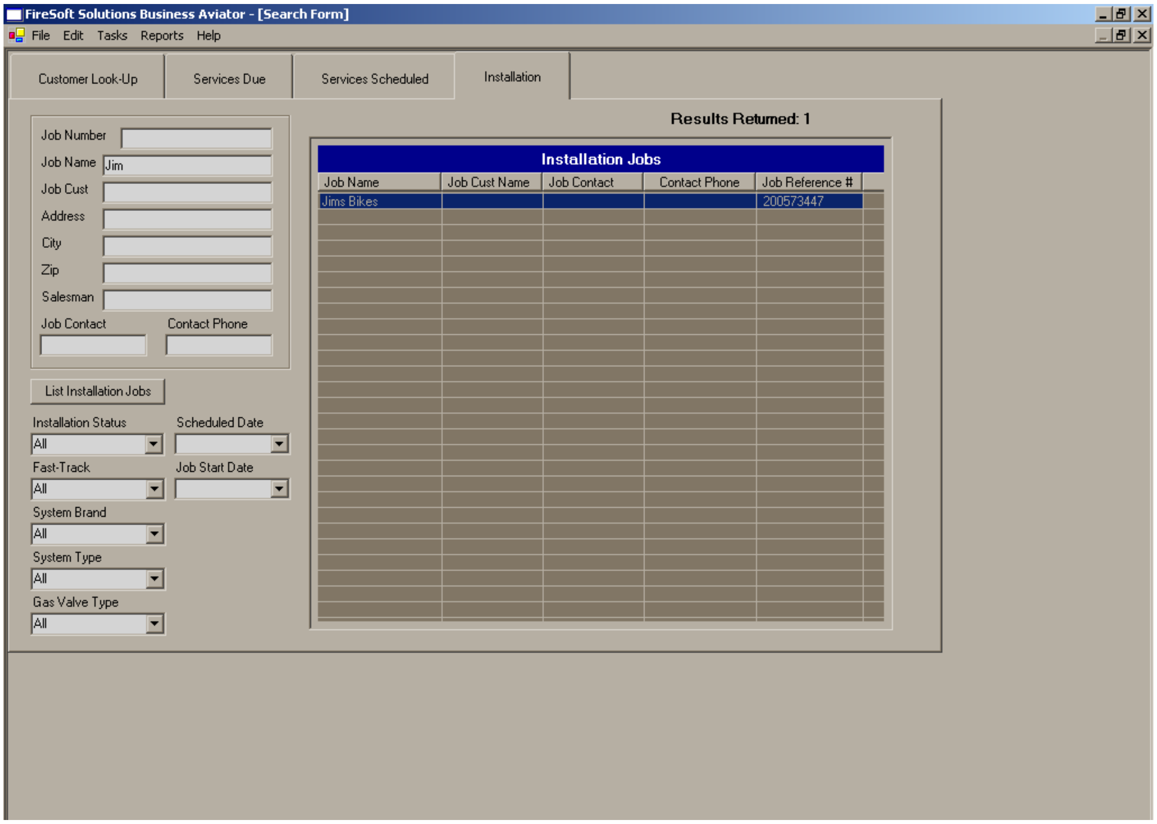


The search form's specific tabs can be accessed at any time by selecting from the Edit menu, or pressing the corresponding F-key for quick access.

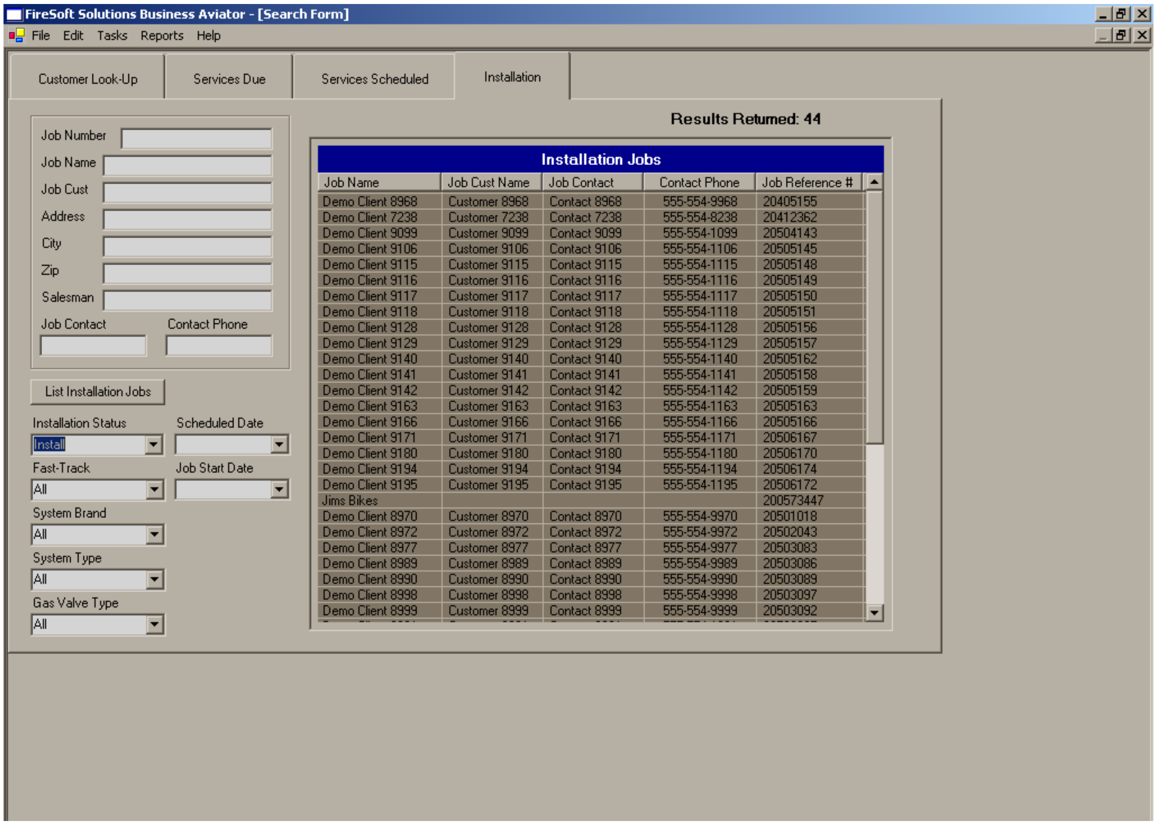


In this case, we want to navigate to the installations search tab so we can make sure we can find this newly added installation.

By typing ‘Jim’ in the job name field, and pressing ‘List All’, we see our installation appear in the list.



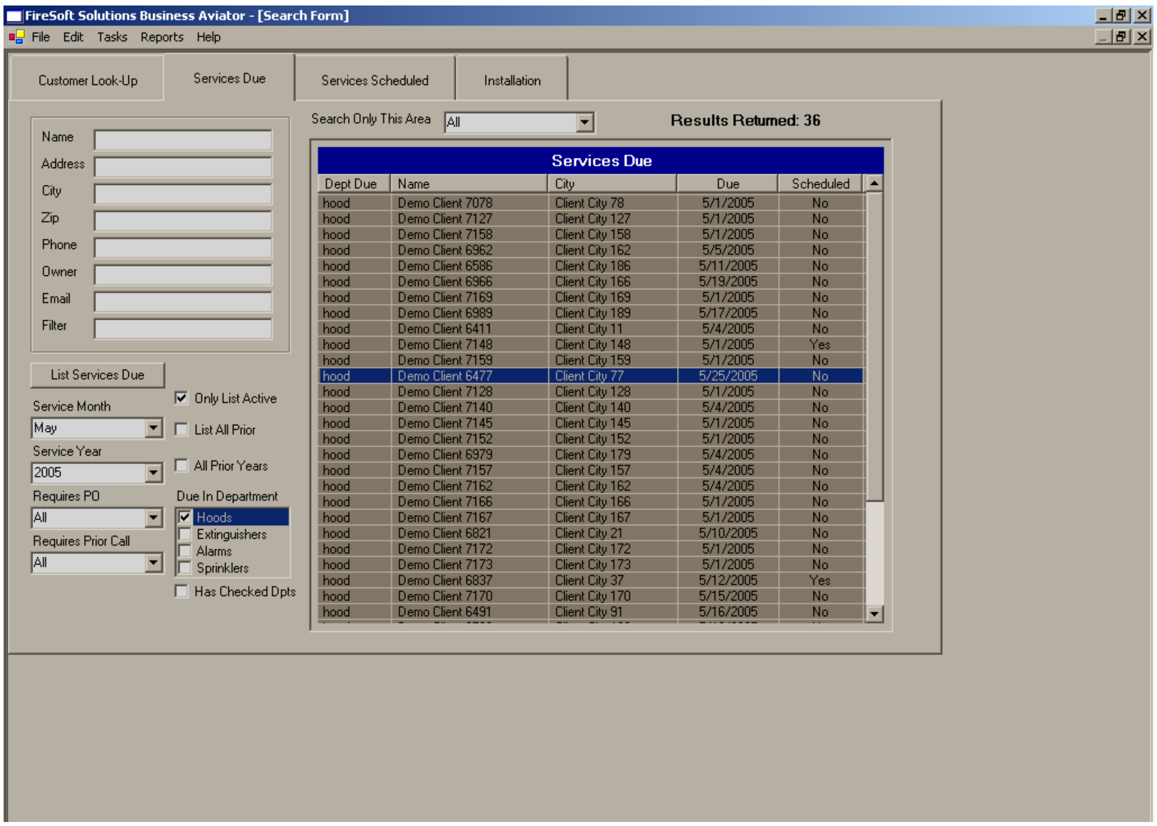
By selecting ‘Install’ from the Installation Status dropdown, we can list all of the current installation jobs that have ‘Install’ status. As you can see, the new record we created is among those listed.



Job Name	Job Cust Name	Job Contact	Contact Phone	Job Reference #
Demo Client 8968	Customer 8968	Contact 8968	555-554-9968	20405155
Demo Client 7238	Customer 7238	Contact 7238	555-554-8238	20412362
Demo Client 9099	Customer 9099	Contact 9099	555-554-1099	20504143
Demo Client 9106	Customer 9106	Contact 9106	555-554-1106	20505145
Demo Client 9115	Customer 9115	Contact 9115	555-554-1115	20505148
Demo Client 9116	Customer 9116	Contact 9116	555-554-1116	20505149
Demo Client 9117	Customer 9117	Contact 9117	555-554-1117	20505150
Demo Client 9118	Customer 9118	Contact 9118	555-554-1118	20505151
Demo Client 9128	Customer 9128	Contact 9128	555-554-1128	20505156
Demo Client 9129	Customer 9129	Contact 9129	555-554-1129	20505157
Demo Client 9140	Customer 9140	Contact 9140	555-554-1140	20505162
Demo Client 9141	Customer 9141	Contact 9141	555-554-1141	20505158
Demo Client 9142	Customer 9142	Contact 9142	555-554-1142	20505159
Demo Client 9163	Customer 9163	Contact 9163	555-554-1163	20505163
Demo Client 9166	Customer 9166	Contact 9166	555-554-1166	20505166
Demo Client 9171	Customer 9171	Contact 9171	555-554-1171	20506167
Demo Client 9180	Customer 9180	Contact 9180	555-554-1180	20506170
Demo Client 9194	Customer 9194	Contact 9194	555-554-1194	20506174
Demo Client 9195	Customer 9195	Contact 9195	555-554-1195	20506172
Jims Bikes				200573447
Demo Client 8970	Customer 8970	Contact 8970	555-554-9970	20501018
Demo Client 8972	Customer 8972	Contact 8972	555-554-9972	20502043
Demo Client 8977	Customer 8977	Contact 8977	555-554-9977	20503083
Demo Client 8989	Customer 8989	Contact 8989	555-554-9989	20503086
Demo Client 8990	Customer 8990	Contact 8990	555-554-9990	20503089
Demo Client 8998	Customer 8998	Contact 8998	555-554-9998	20503097
Demo Client 8999	Customer 8999	Contact 8999	555-554-9999	20503092

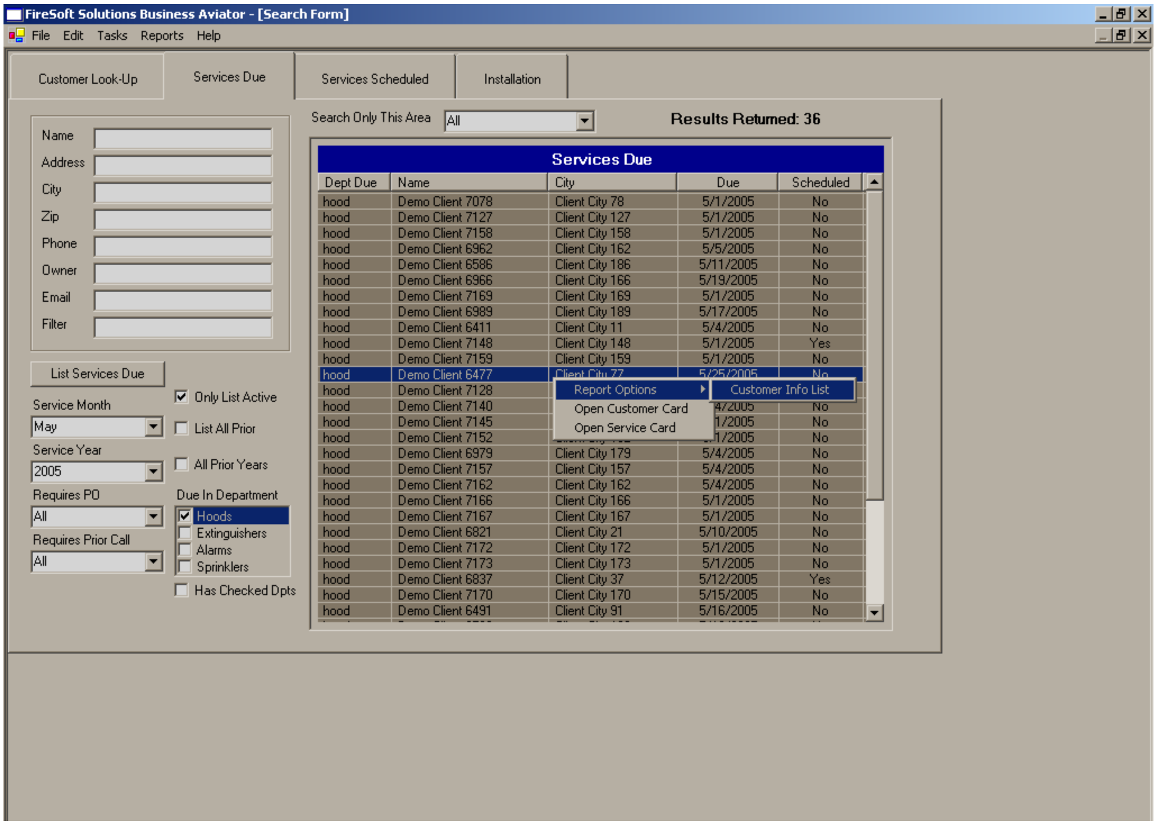
Managing Services

By opening the 'Services Due' search tab, we can begin our service scheduling by entering specific search criteria and generating a list of only the services that are currently due meeting our criteria.

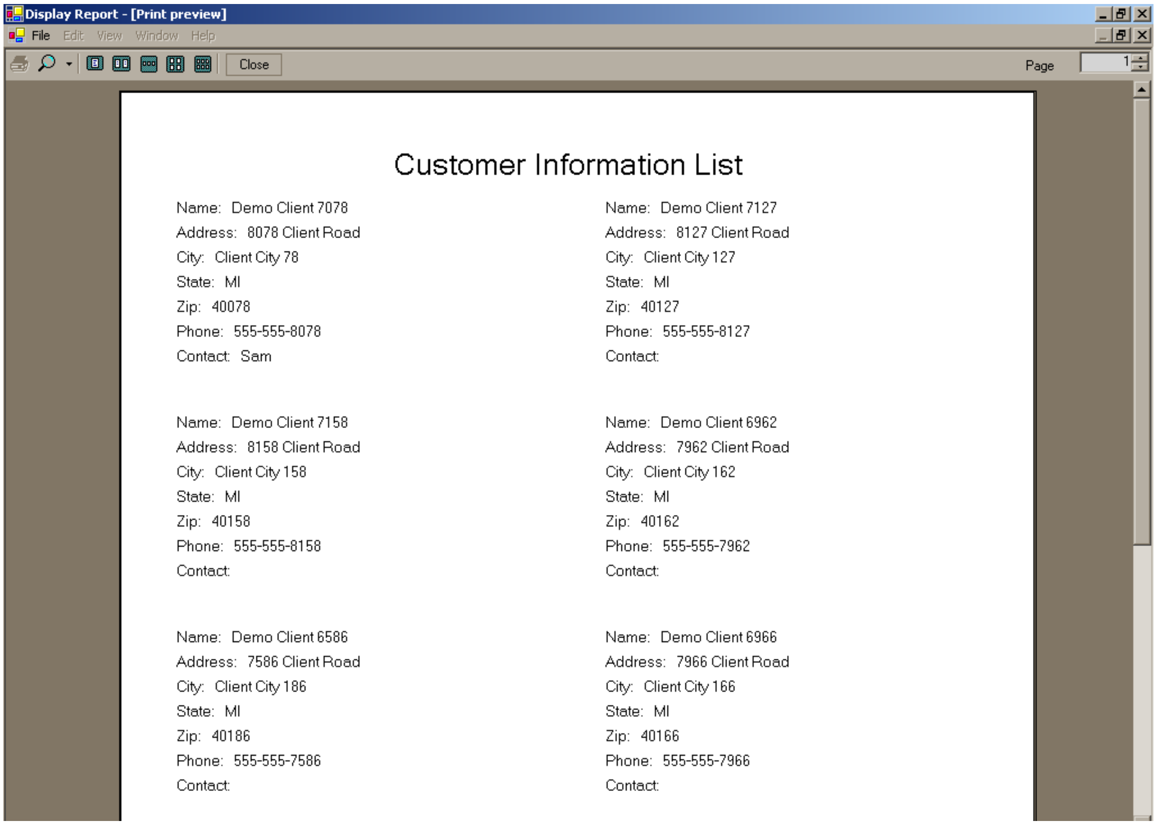


In this case, we searched for services that are due in the month of May, during the year 2005, within the Hood Systems department listing only customers that are active in our database (ones that we currently service).

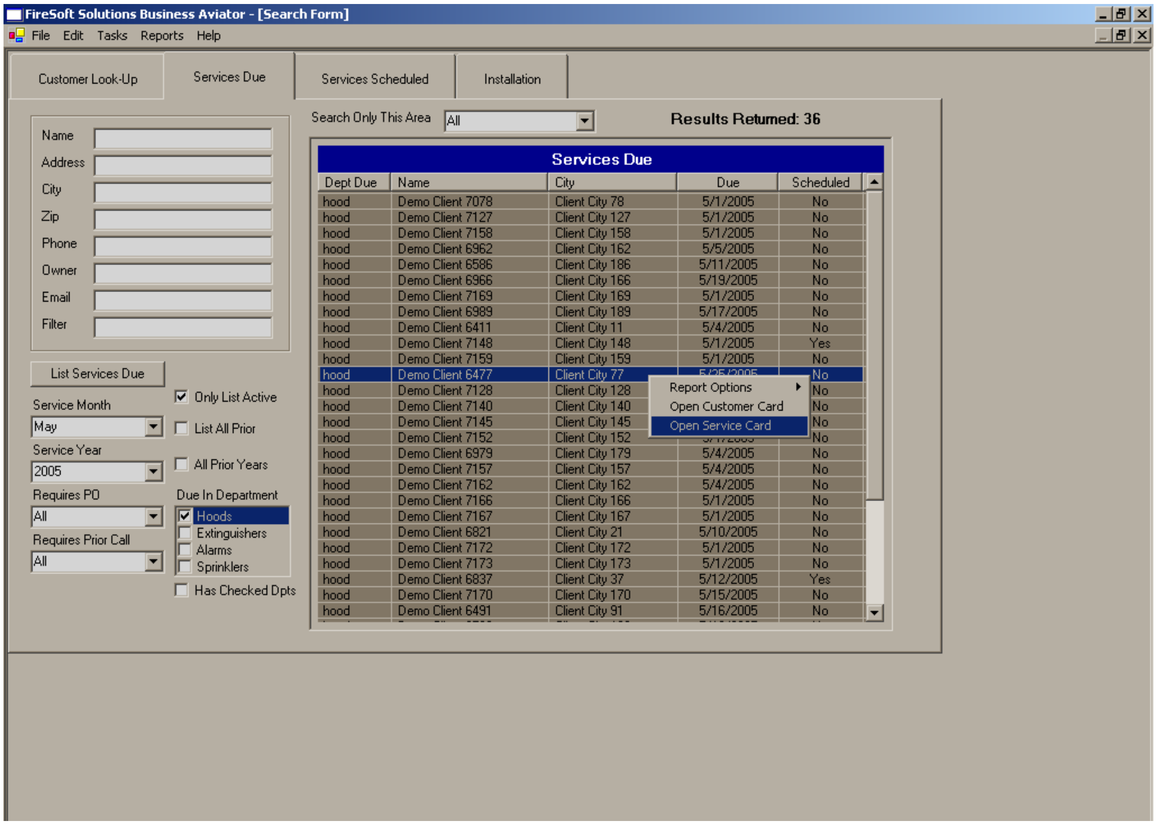
By right clicking, we have a few options at our disposal. These options include generating a report for all the listed entries, opening the customer card for a specific record or opening the service card for a record.



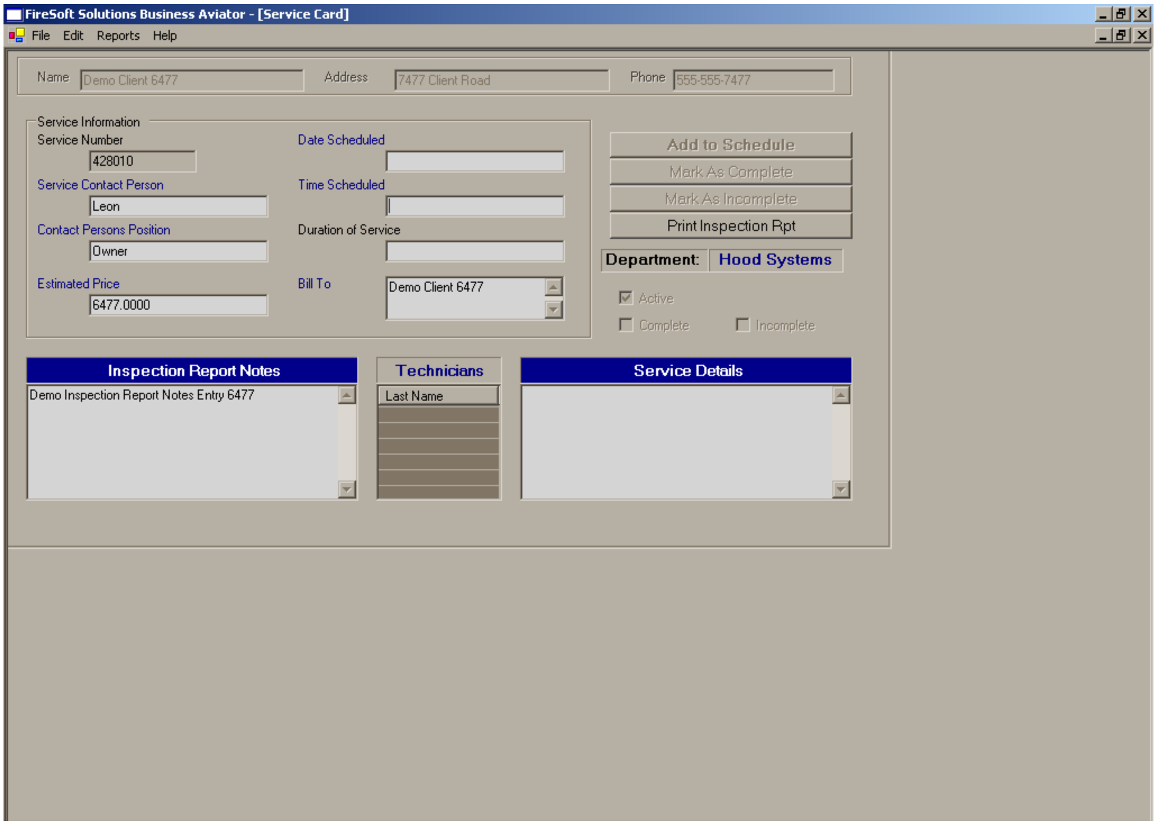
By choosing ‘Customer Info List’ we are provided with a report detailing all the customers that met our search criteria. This mechanism provides a powerful way to utilize the search forms as a reporting tool.



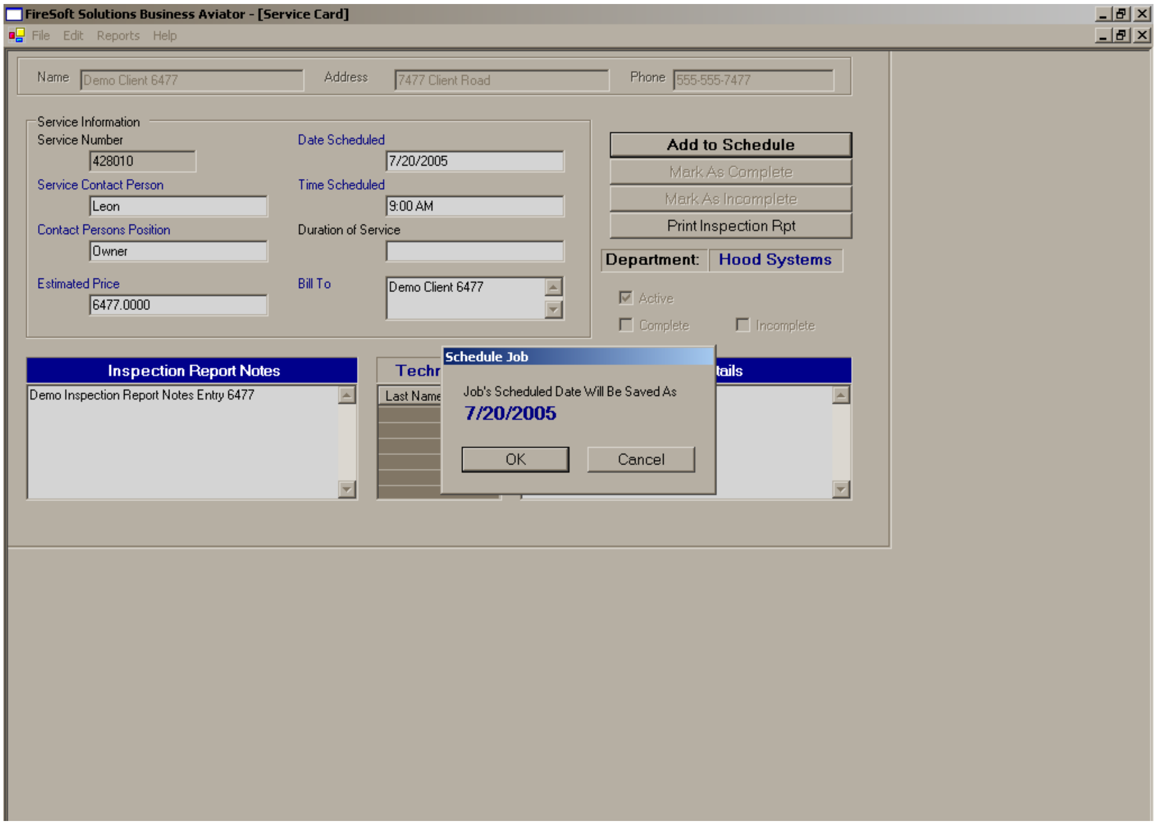
For the purpose of managing the services, we would normally opt to choose 'Open Service Card' once we located a customer with a service due that we would like to schedule.



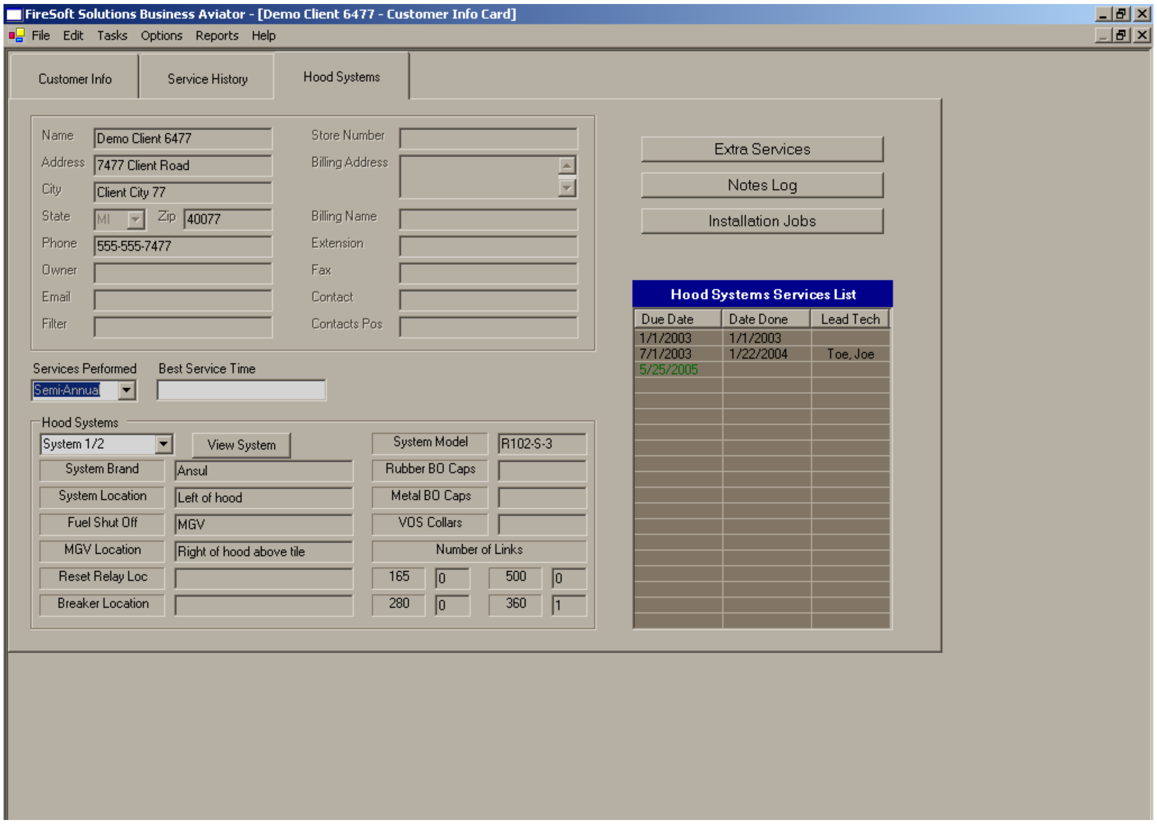
We are then presented with the service card for this customer's due-service. By default, the most recent completed service information is added to the new service card, to avoid having to re-enter data that is normally very similar each service.



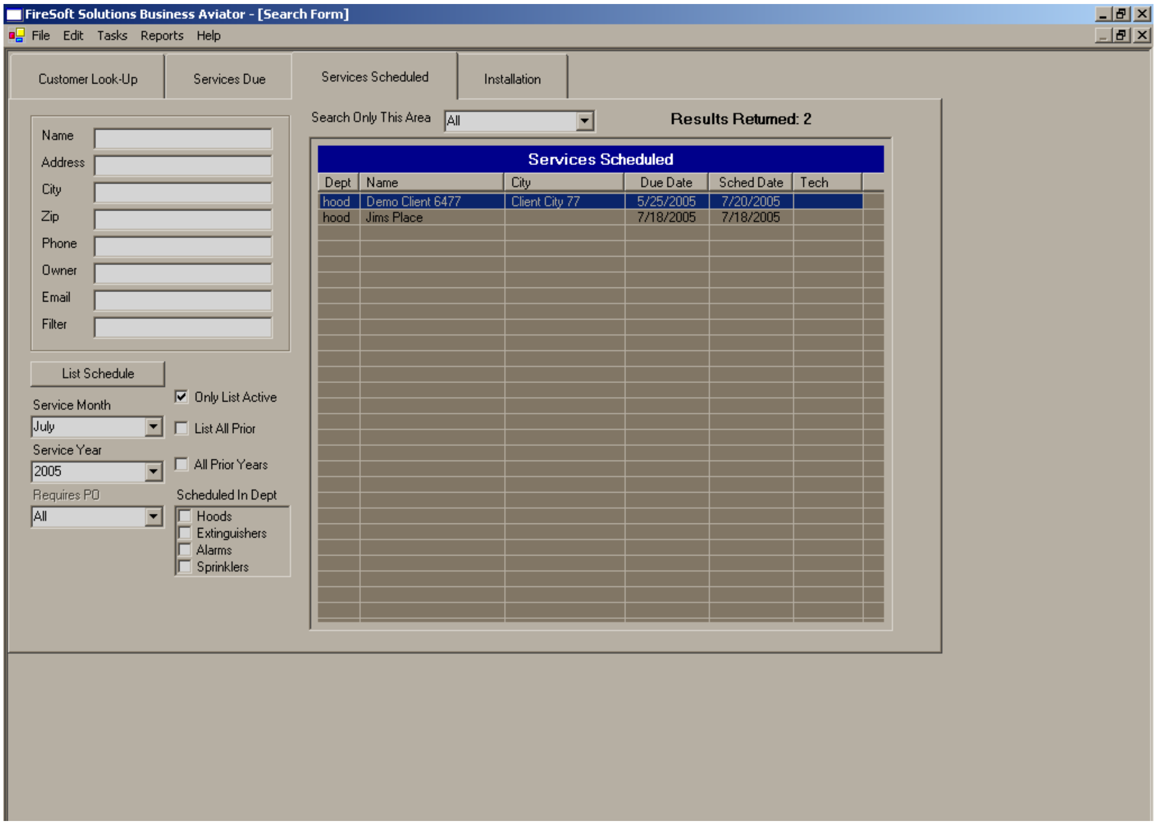
Once we fill in the Date Scheduled and Time Scheduled, the 'Add to Schedule' button will become available. Upon clicking 'Add to Schedule' you are prompted with a confirmation to add the service to the schedule.



All services that have been scheduled will appear highlighted in green on the customer cards department tab for which the service was scheduled.

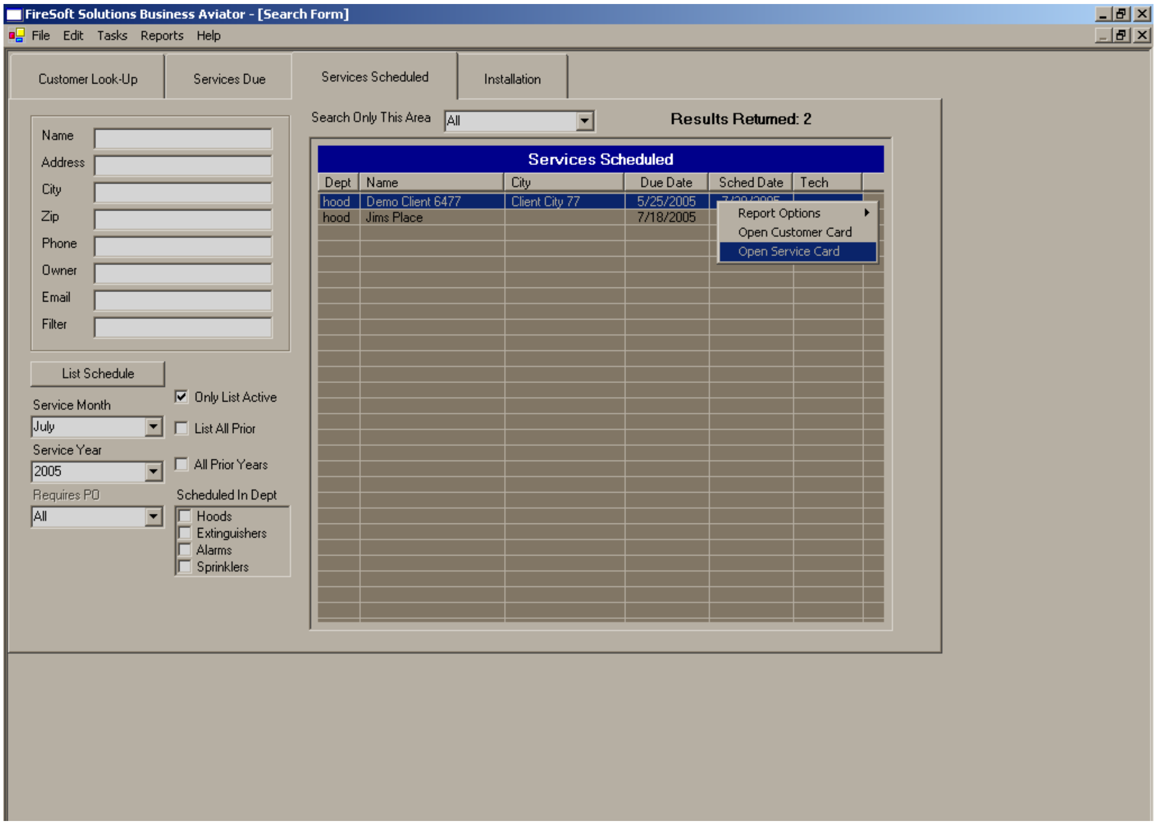


Returning to the search card, we now navigate to the 'Services Scheduled' tab. This has similar criteria to the Services Due tab, but only lists services that are currently scheduled.

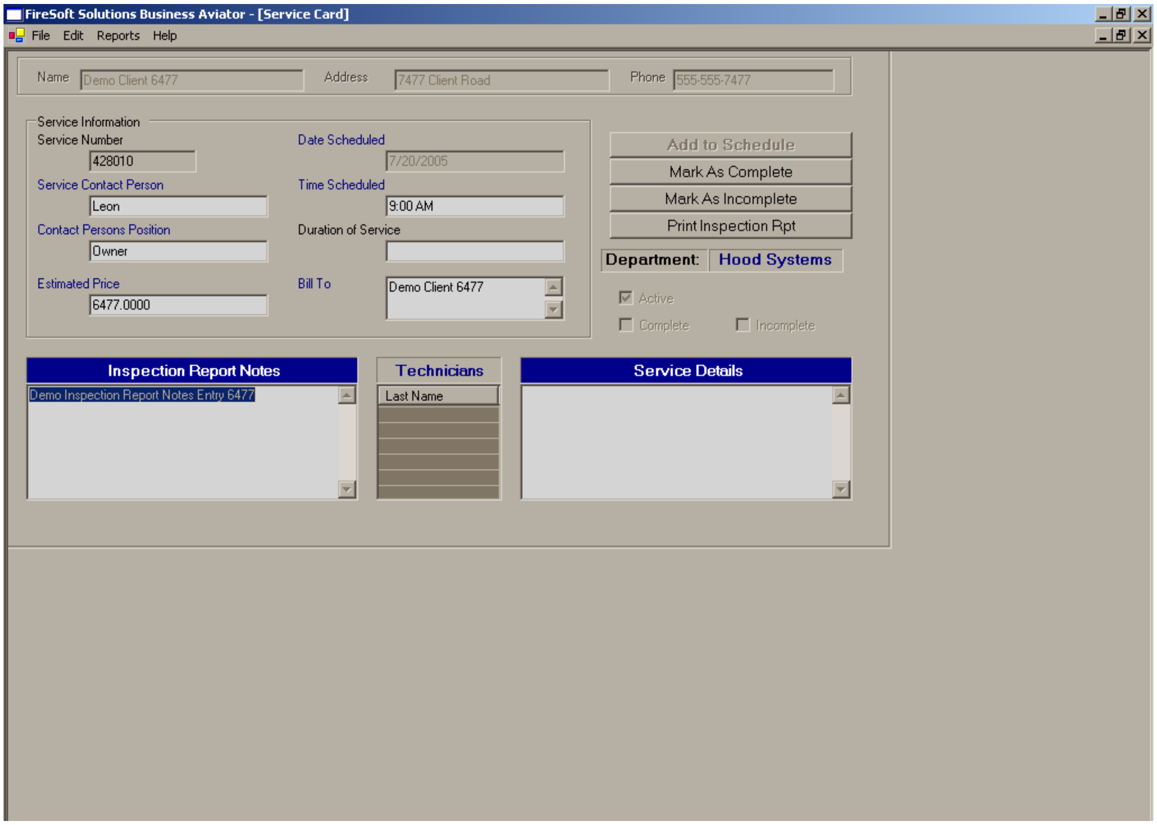


By searching for services scheduled in July 2005, we find the customer for which we just scheduled a service in the hood systems department.

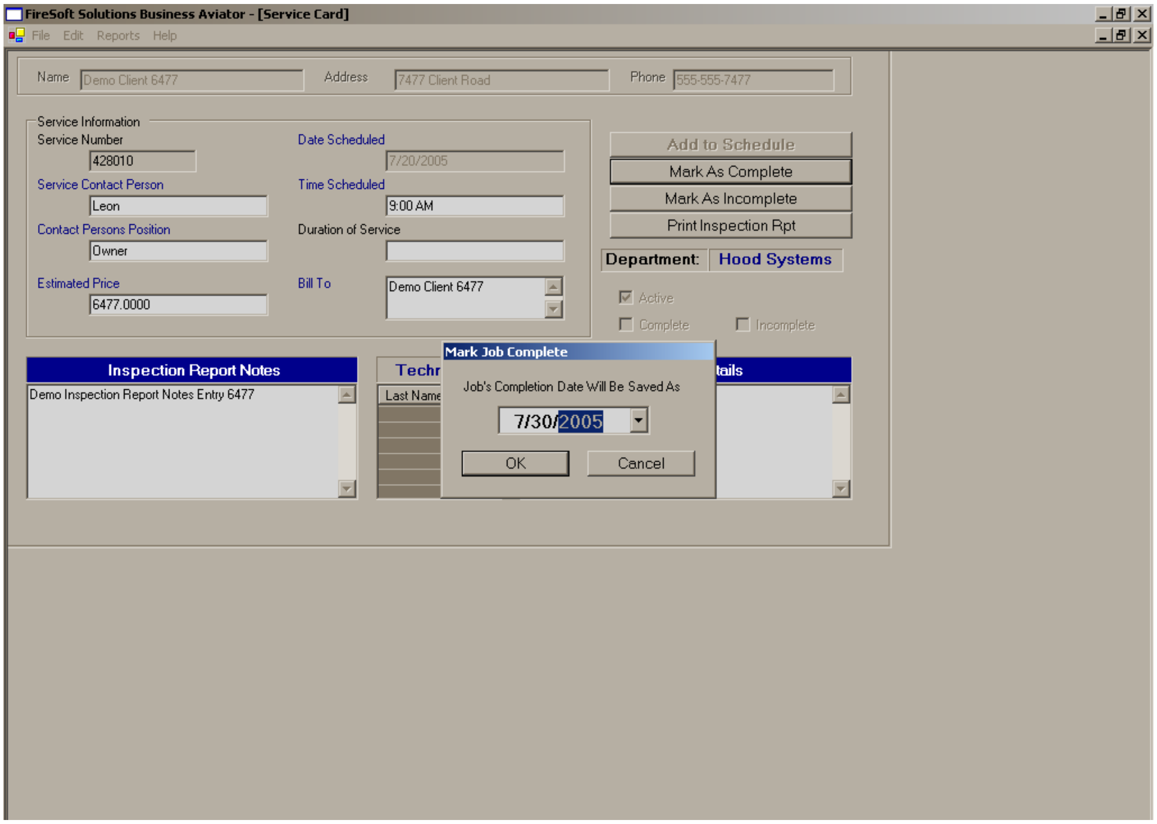
We can then right click and choose to report on the services due that are in the list, or open the service card for the customer to make changes, or mark the service complete. We will choose to open the service card for the customer we just scheduled.



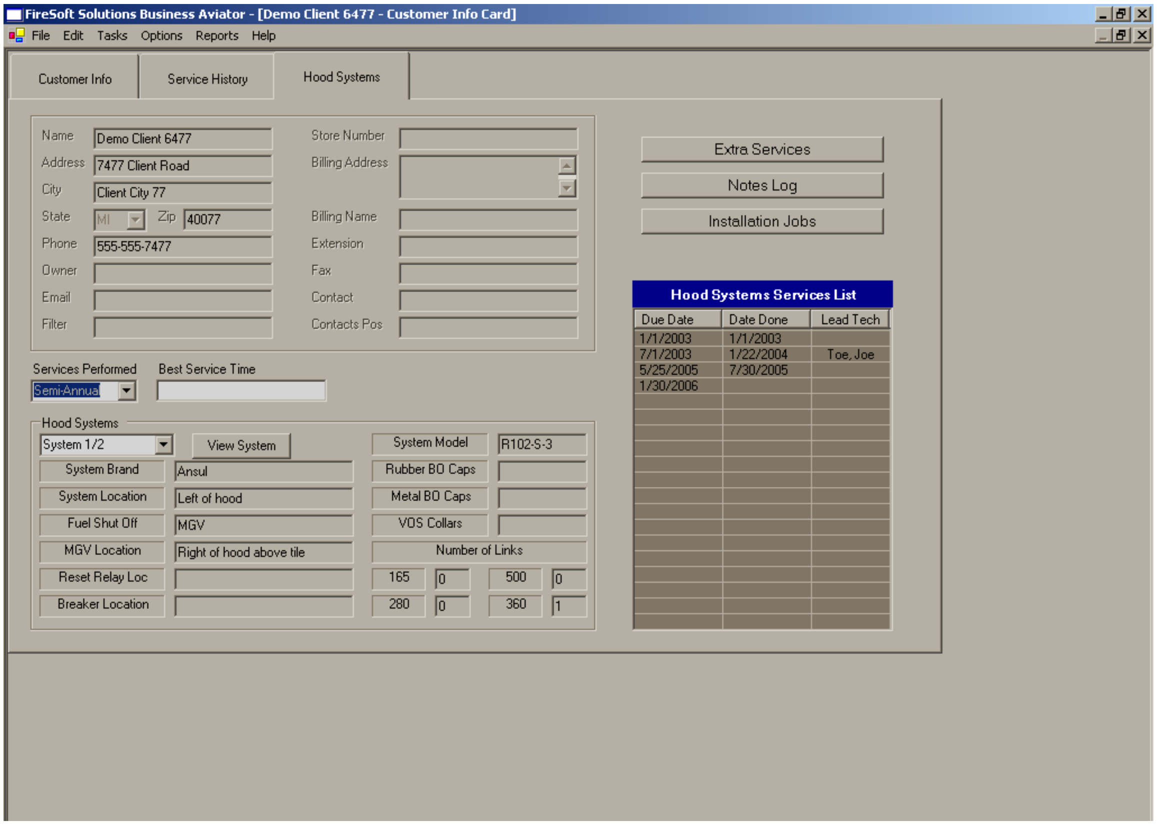
Once a service has been scheduled, its 'Date Scheduled' cannot be changed, but the time can be changed at any time. At this point, a scheduled service has to either be marked 'Complete' or 'Incomplete'.



When the service is completed, we will choose ‘Mark As Complete’. We will then be prompted to enter the completion date.

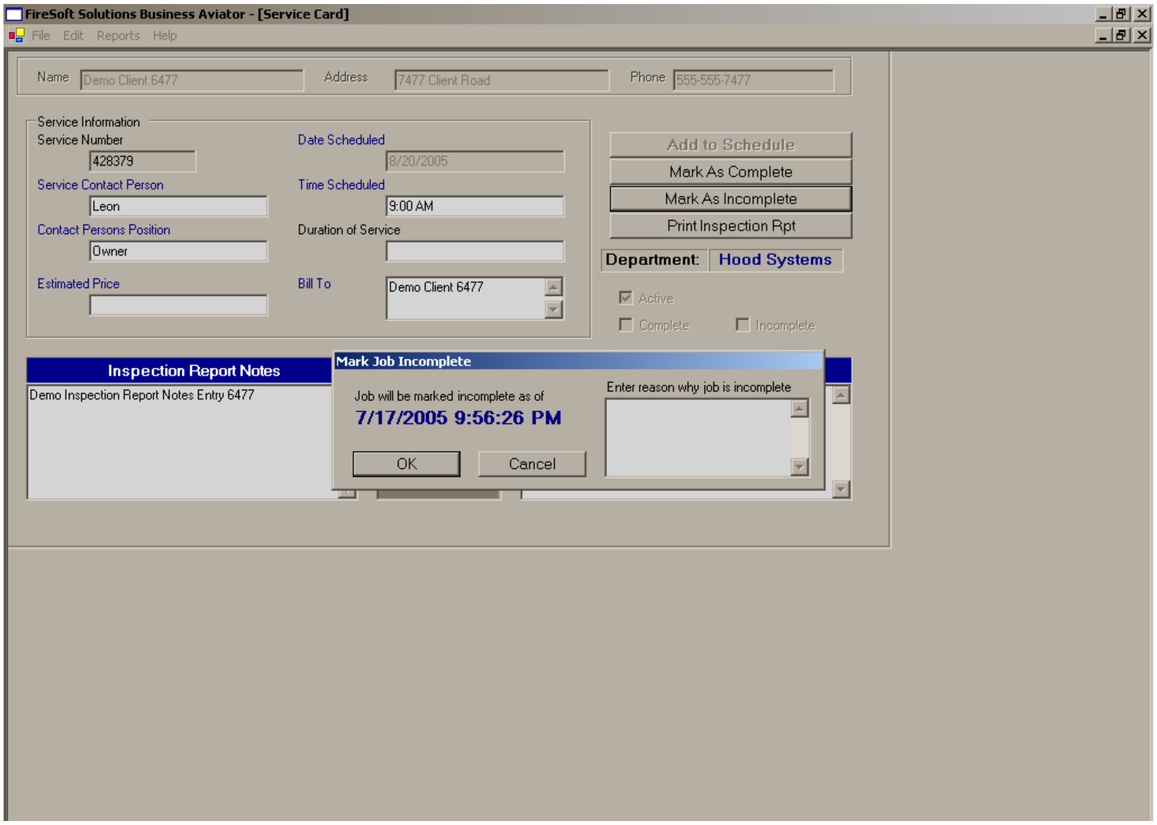


Returning to the customer card, we notice that the service we just completed has our new completion date, and a new service due date has been created based on our selection in the 'Service Frequency' dropdown.

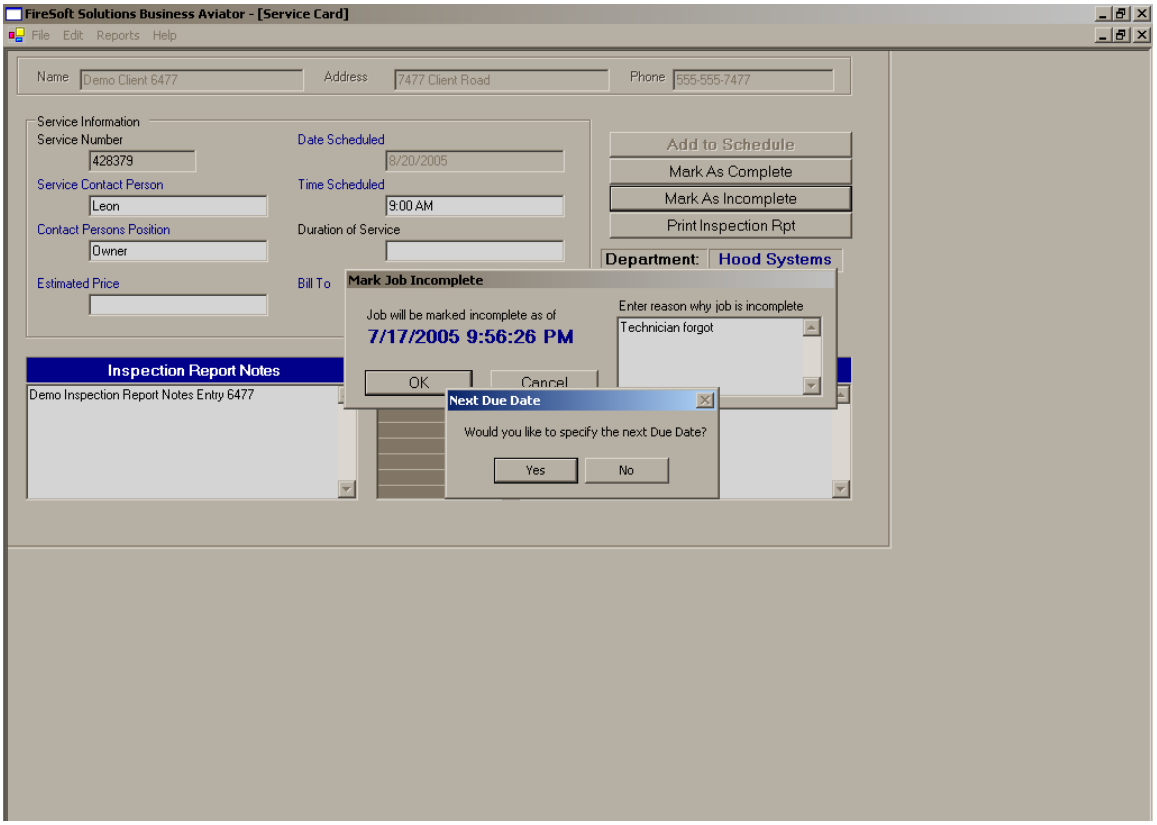


If any service due date is incorrect, by right clicking on the service we can choose 'Override Due Date' to correct the due date.

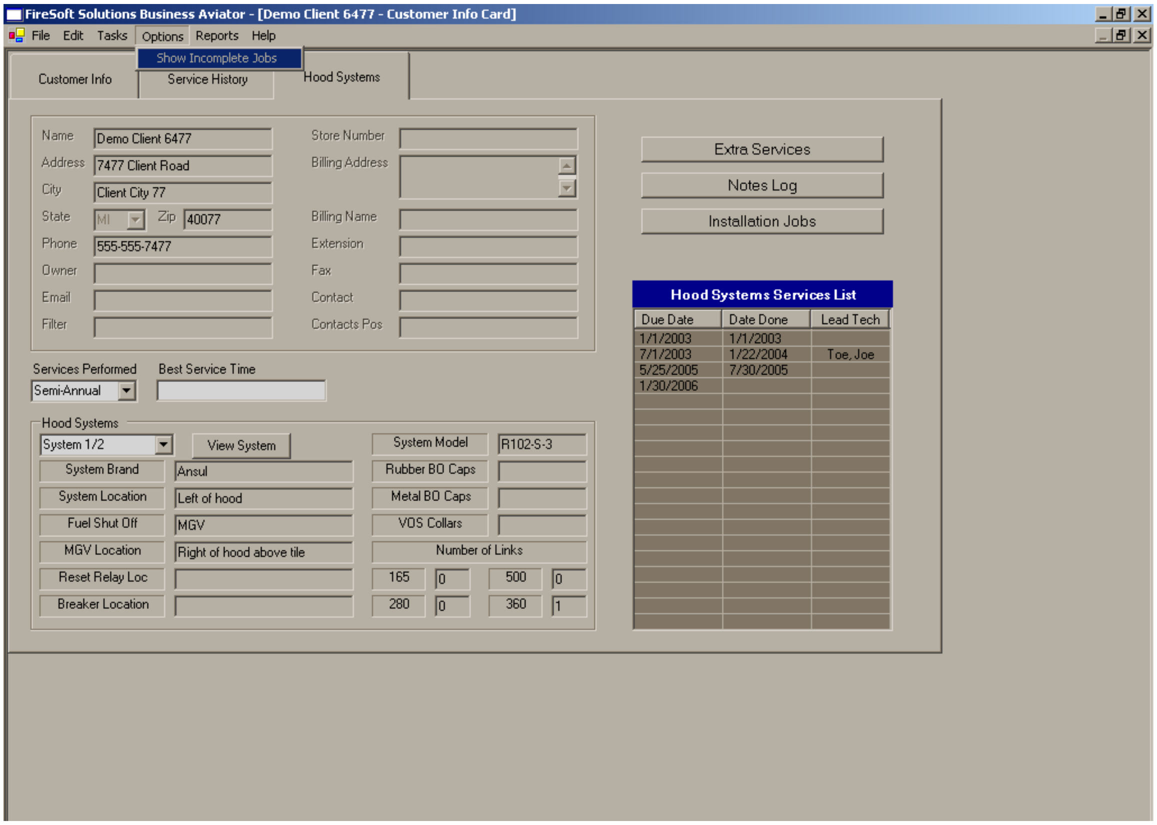
If rather than completing the service on the date it was scheduled, it was not completed for some reason; we would choose 'Mark As Incomplete' on the service card. This will prompt the user to enter a reason why the job was not completed.



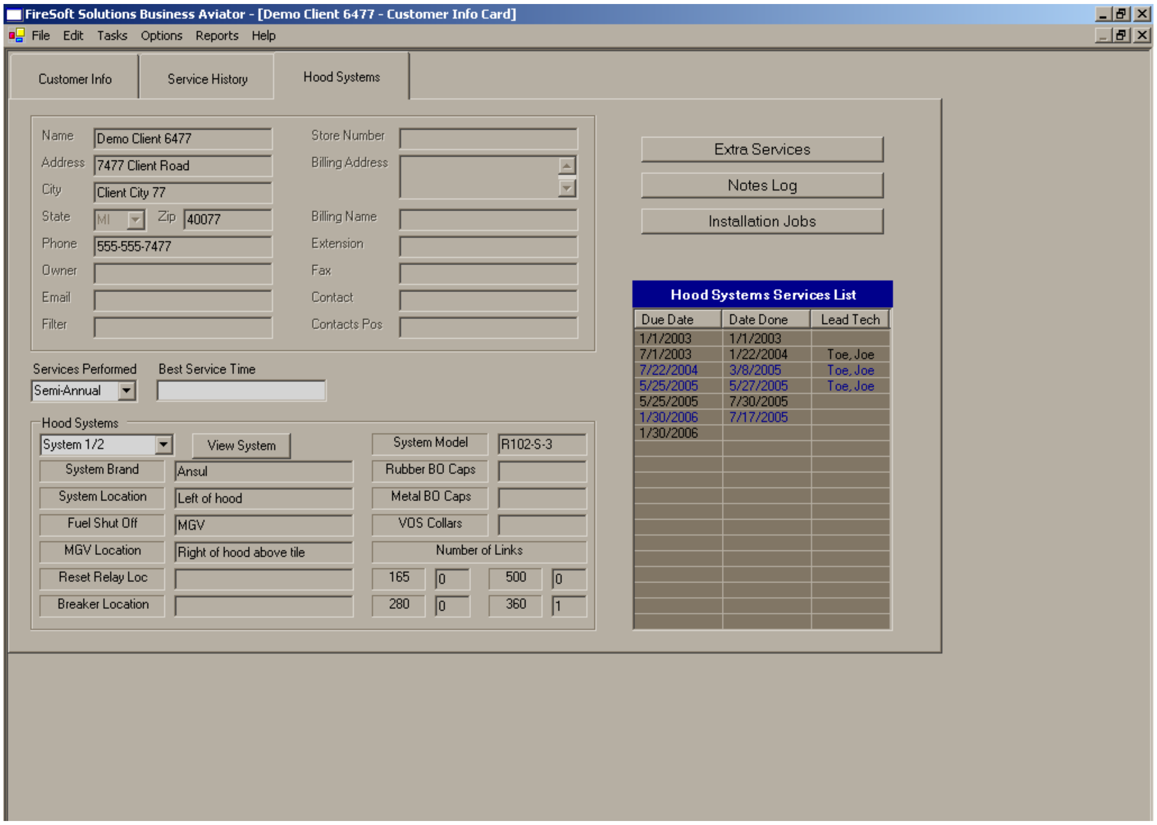
After entering a reason and choosing OK, the user will be given the option to specifically set the next due date or not. If 'No' is chosen, the due date defaults back to the previous service due date.



By default, incomplete jobs are not shown in the services list in a department. We can choose Options-> Show Incomplete Jobs at any time to list these.



With ‘Show Incomplete Jobs’ selected, all of the jobs marked incomplete will show highlighted in blue on the systems services list in each department.



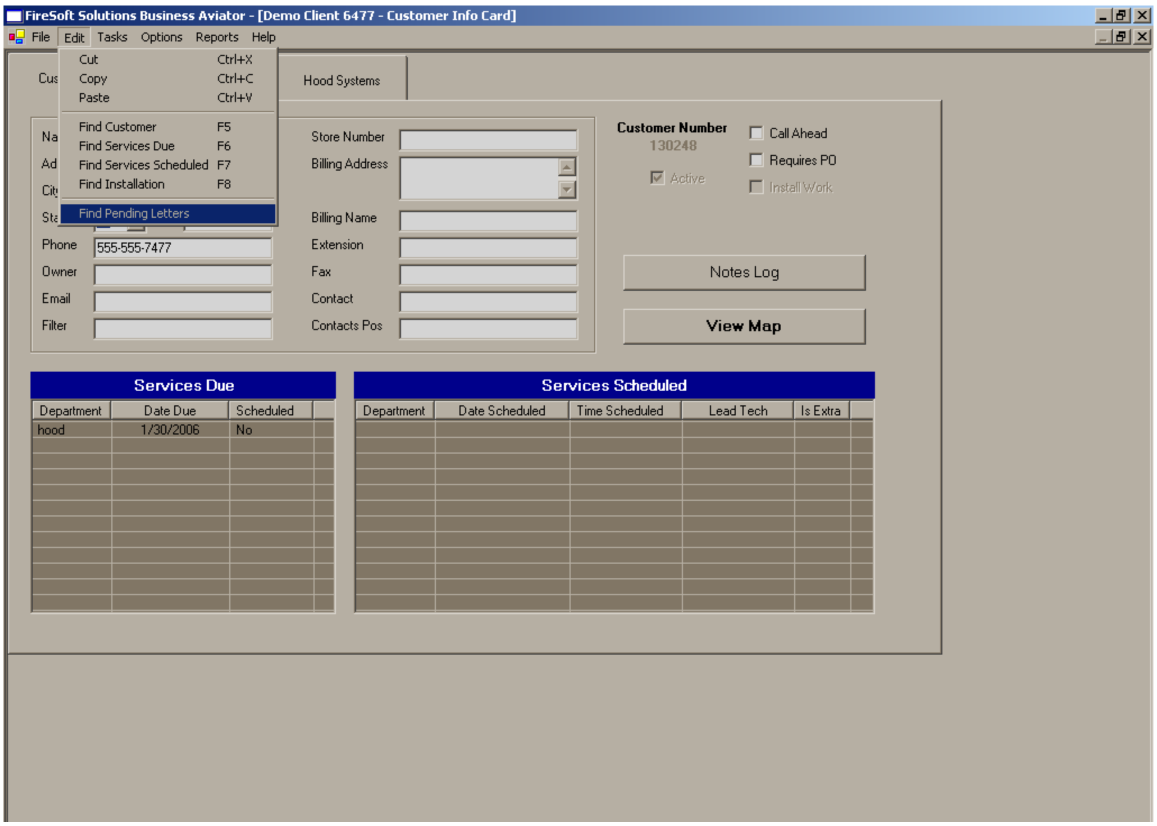
You can see our recent job marked incomplete defaulted back to its original due date because we chose not to specify a due date when marking it incomplete.

Miscellaneous Management Tools

Letter List:

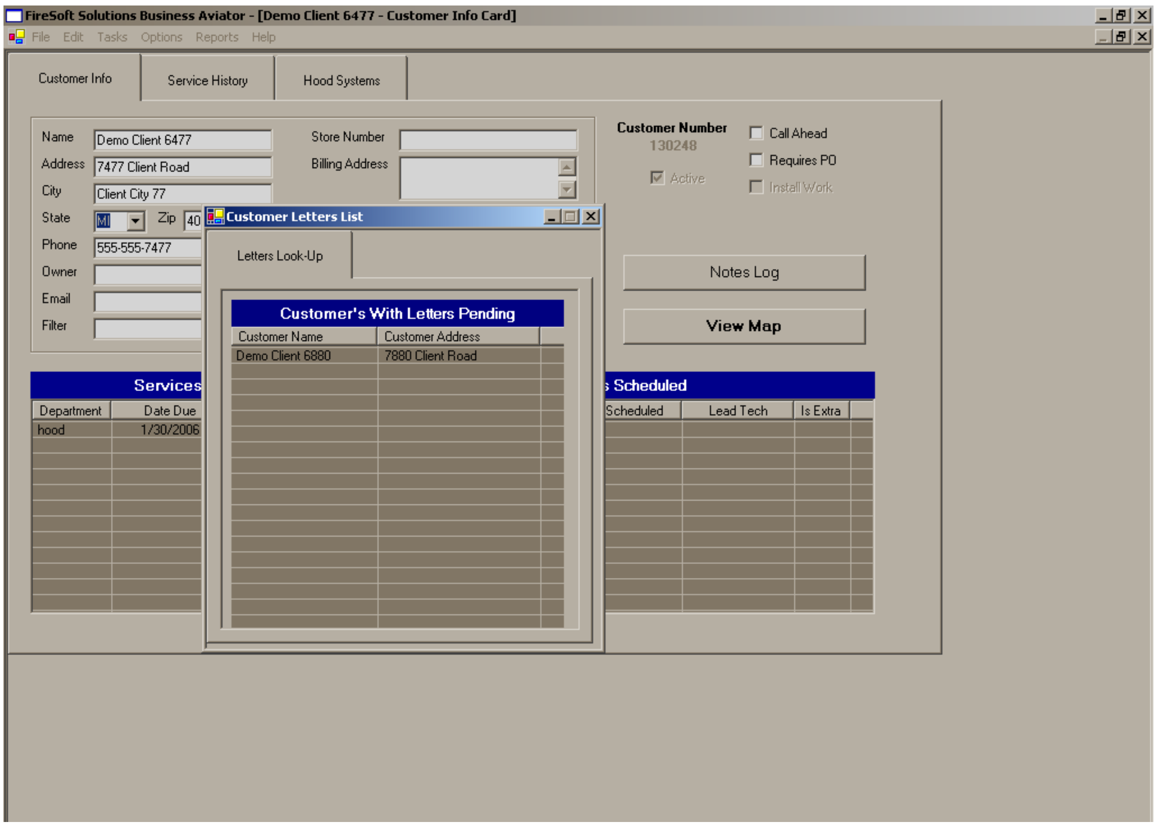
There are a few other general management tools within the application, and any further management tools can be added per your preference to your customized version of the application.

The picture shown below shows us selecting 'Find Pending Letters'

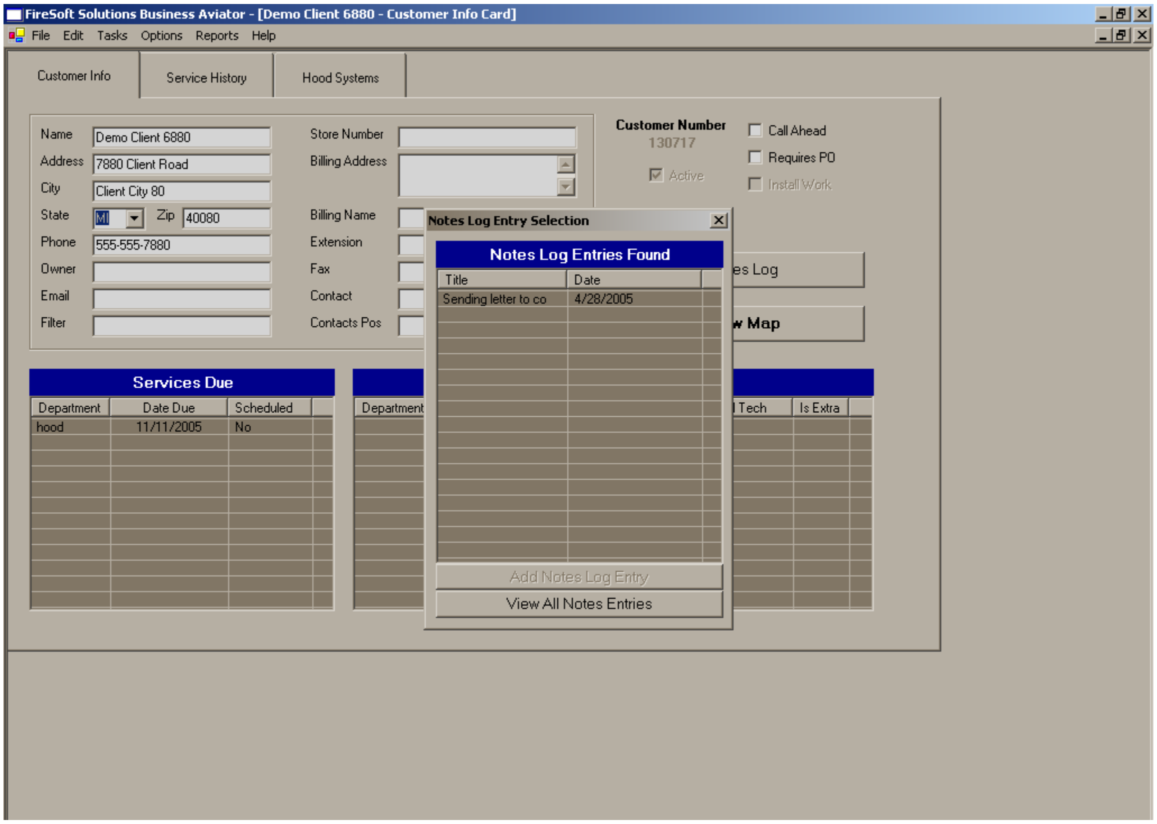


The ‘Letter List’ will allow us to manage letters sent to customers for any reason. This letter list is integrated with the notes log records, so we are able to record when and why a letter was sent to a customer.

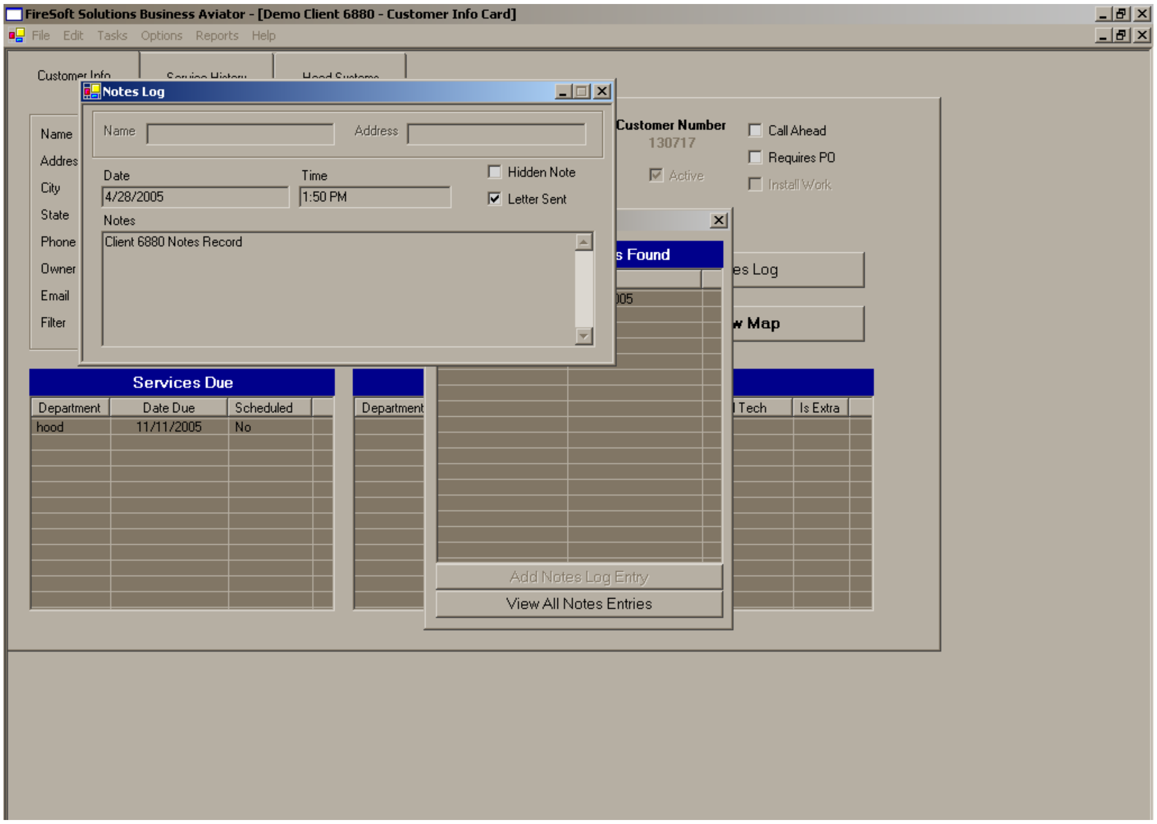
Choosing ‘Find Pending Letter’ displays a list of customers that currently have unresolved letters pending in the company.



By opening the record from the list, the customer card is opened and we see in the notes list that a record exists regarding this letter.



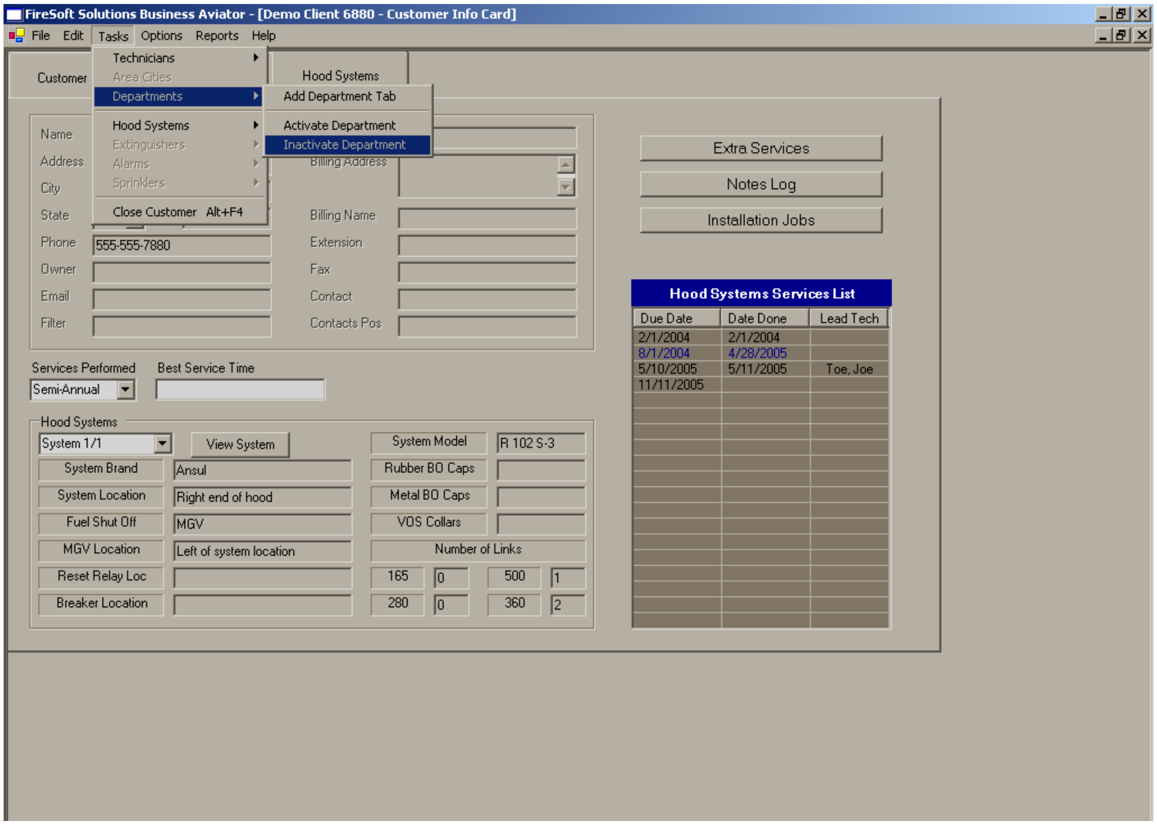
A notes record can be added to this pending letter list by checking the 'Letter Sent' box within a notes log entry.



Department Management:

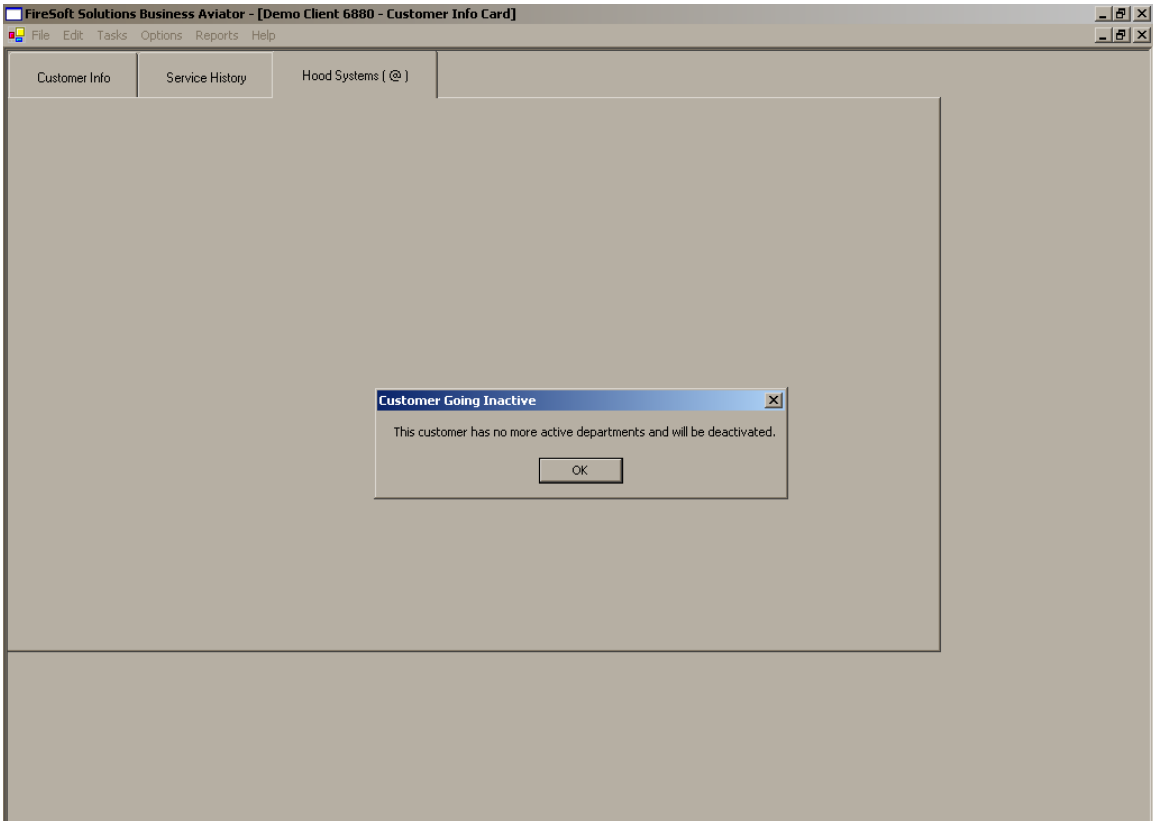
If a customer is no longer serviced by a particular department, de-activating the customer in that department is very easy.

By opening the customer, and navigating to the department tab that we want to deactivate, we simply choose to inactivate the department from the Tasks menu.

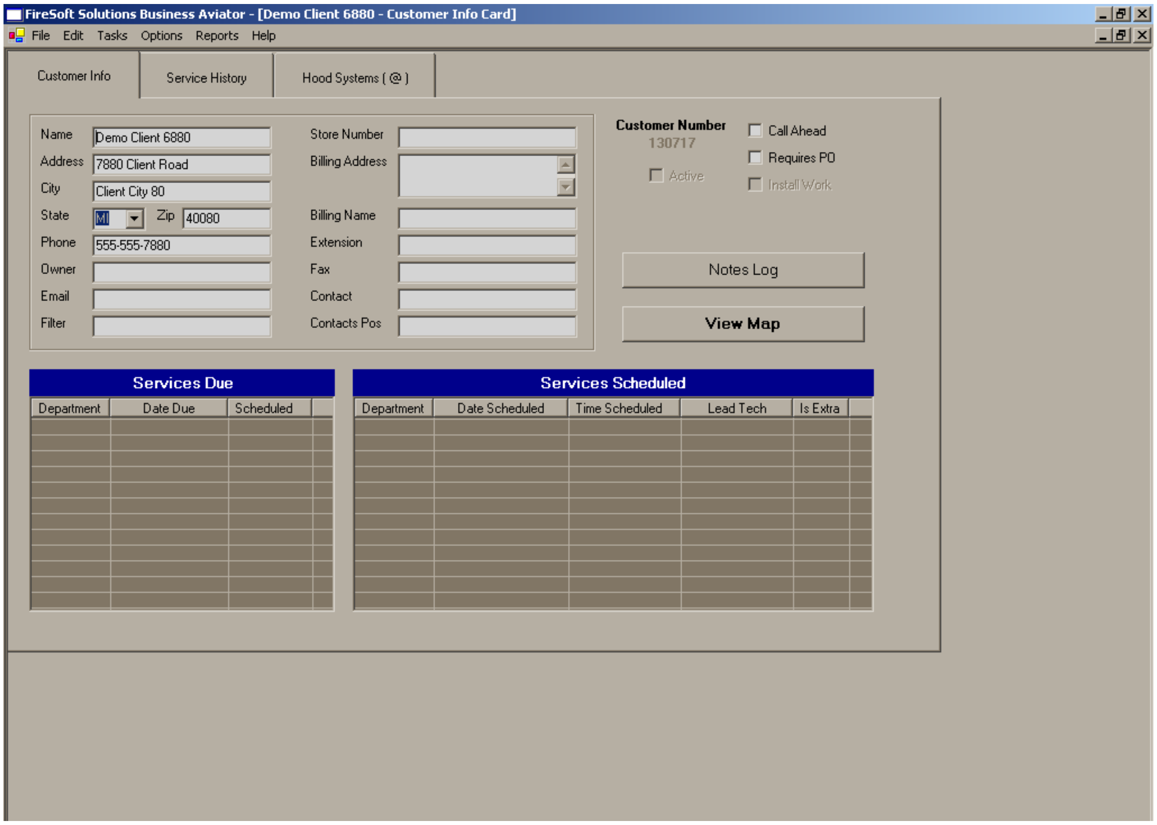


If the customer no longer has any active departments in the company, you will receive a message stating that the customer itself is being deactivated.

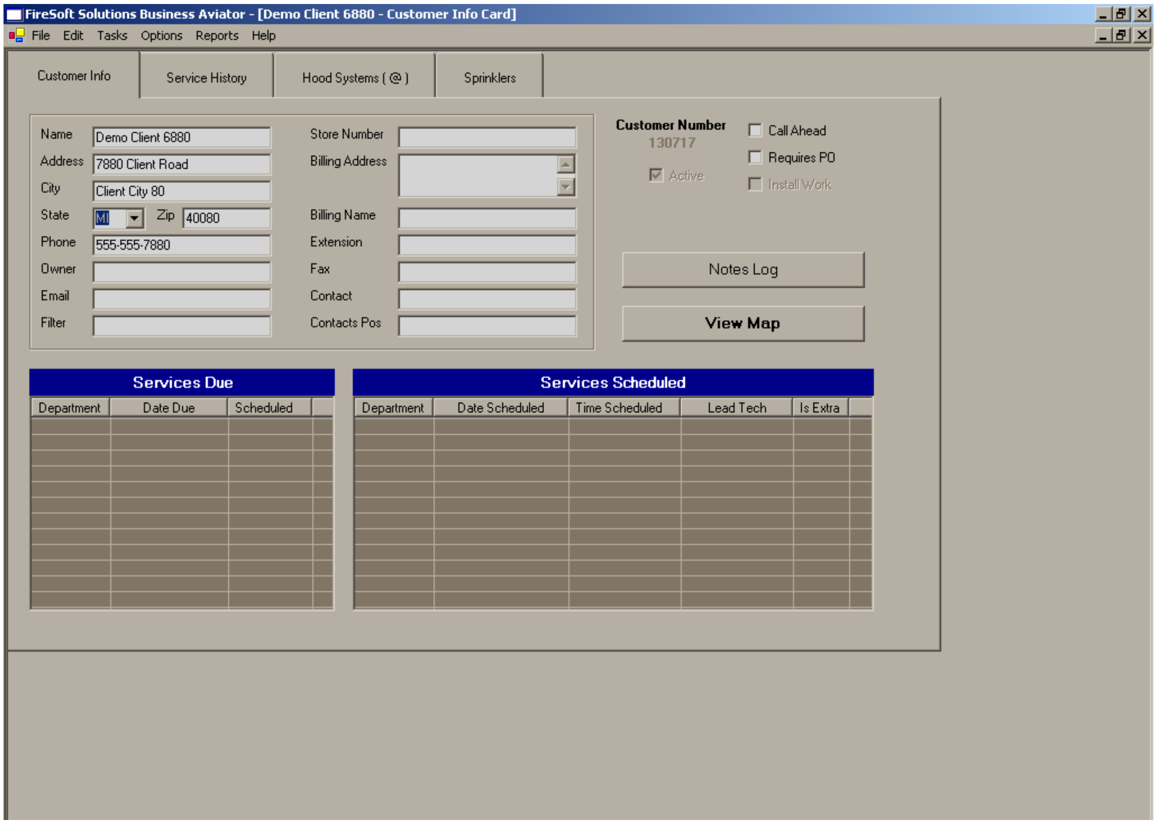
The customer will no longer show up when searching ‘Active’ customers.



As you can see, when a department is de-activated it is shown with unique character on the tab, and the department information is not displayed. Both the character and whether or not this information is displayed are definable in the configuration.



By adding a new department to this customer, the customer becomes active again, but the department that was marked inactive does not.



A department cannot be removed once added; it can only be deactivated. A department can be re-activated following the same procedure used to deactivate the department.

Conclusion:

Although not everything was covered in this document, this should provide a good basis for performing any of the operations within the system. Adding a customer, managing services and adding and managing installations within each department is the basis from which most operations in the system work.

This is a living document, and will be updated based on user feedback and necessity. If you have any further questions regarding a feature or features that were not covered in this document, or find that the document is lacking in explanation of a specific area you believe should be included, please feel free to email us anytime at talktous@firesoftsolutions.com.