

# **FireSoft<sup>®</sup>**

## **Application Reviewer's Guide**

---

[www.firesoftsolutions.com](http://www.firesoftsolutions.com)

## 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.

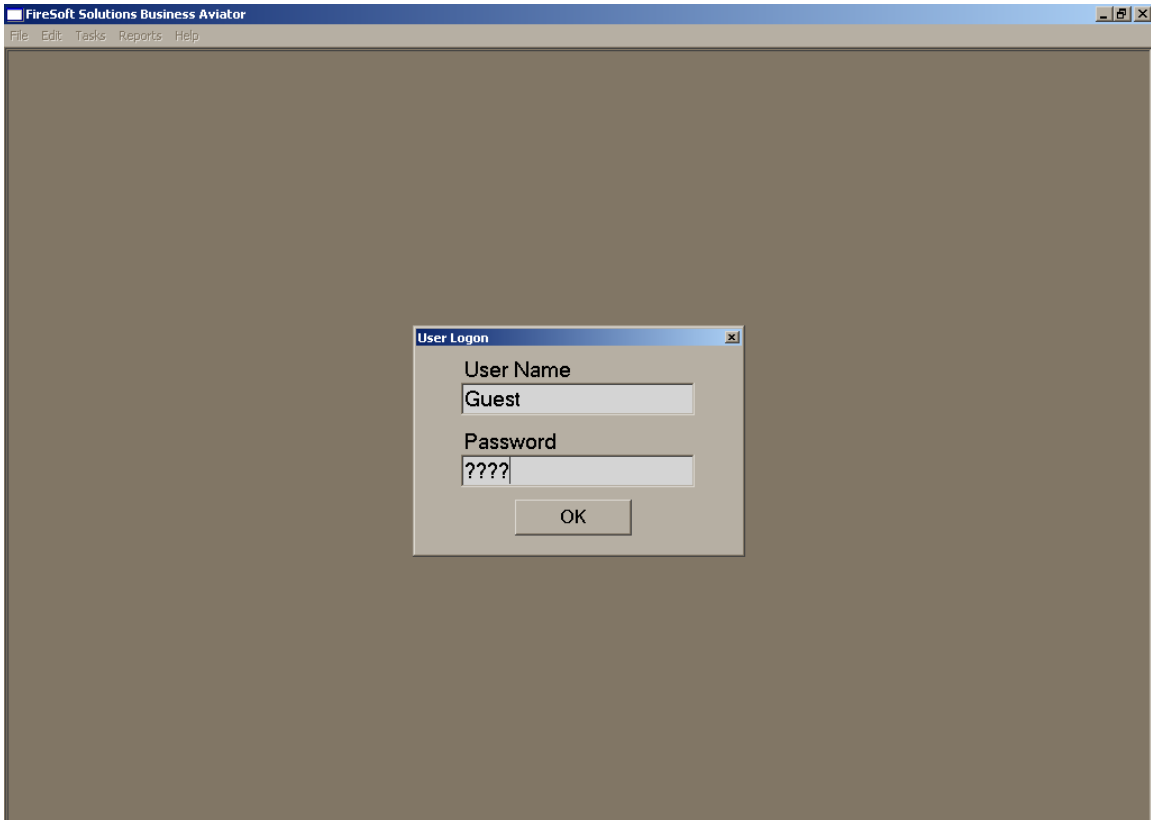
Only a couple reporting mechanisms are contained within this document. Your company will have custom reports that meet your personal needs. Currently some custom reports may not display any data in the Demo Application due to the reliance on SQL Server Reporting that is not an available feature when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

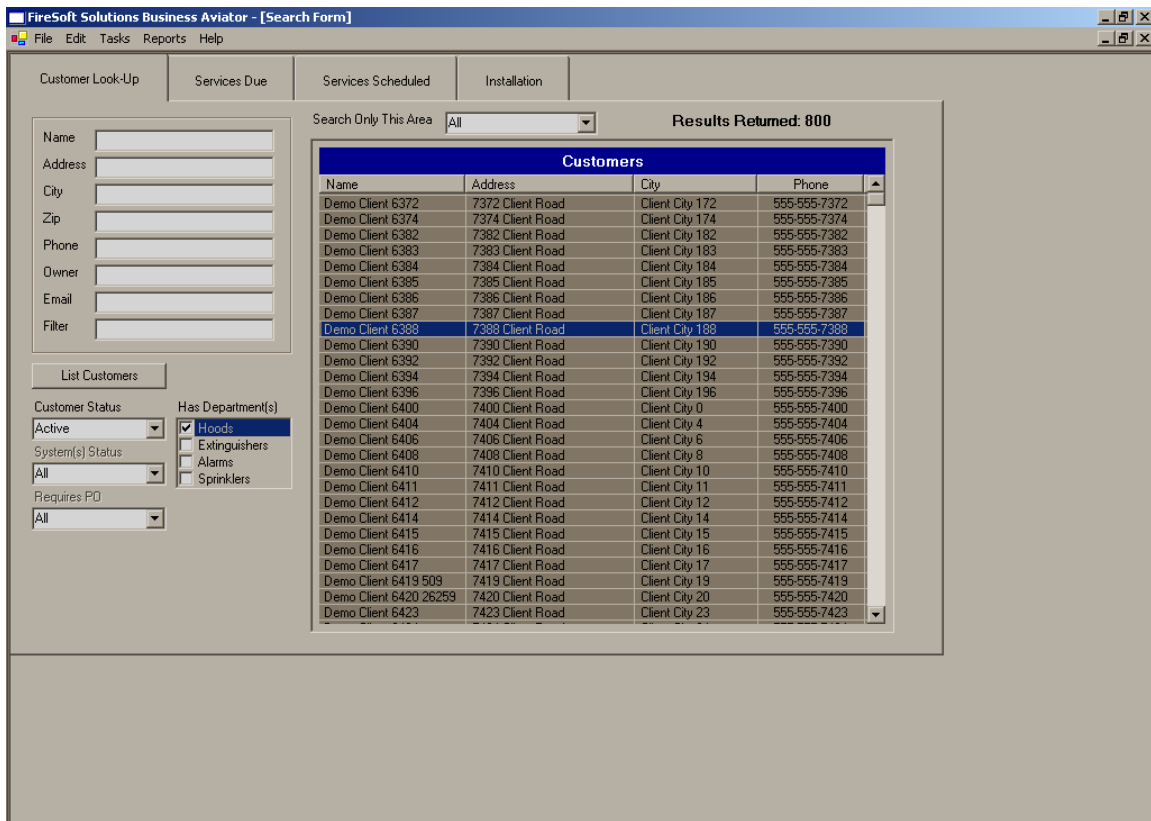
General information and introduction to application use.....	Pg. 3
Information regarding <u>customers</u> in the system.....	Pg. 14
Information regarding <u>installations</u> in the system.....	Pg. 33
Information regarding <u>service management</u> in the system.....	Pg. 48
Miscellaneous management features in the system.....	Pg. 64

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





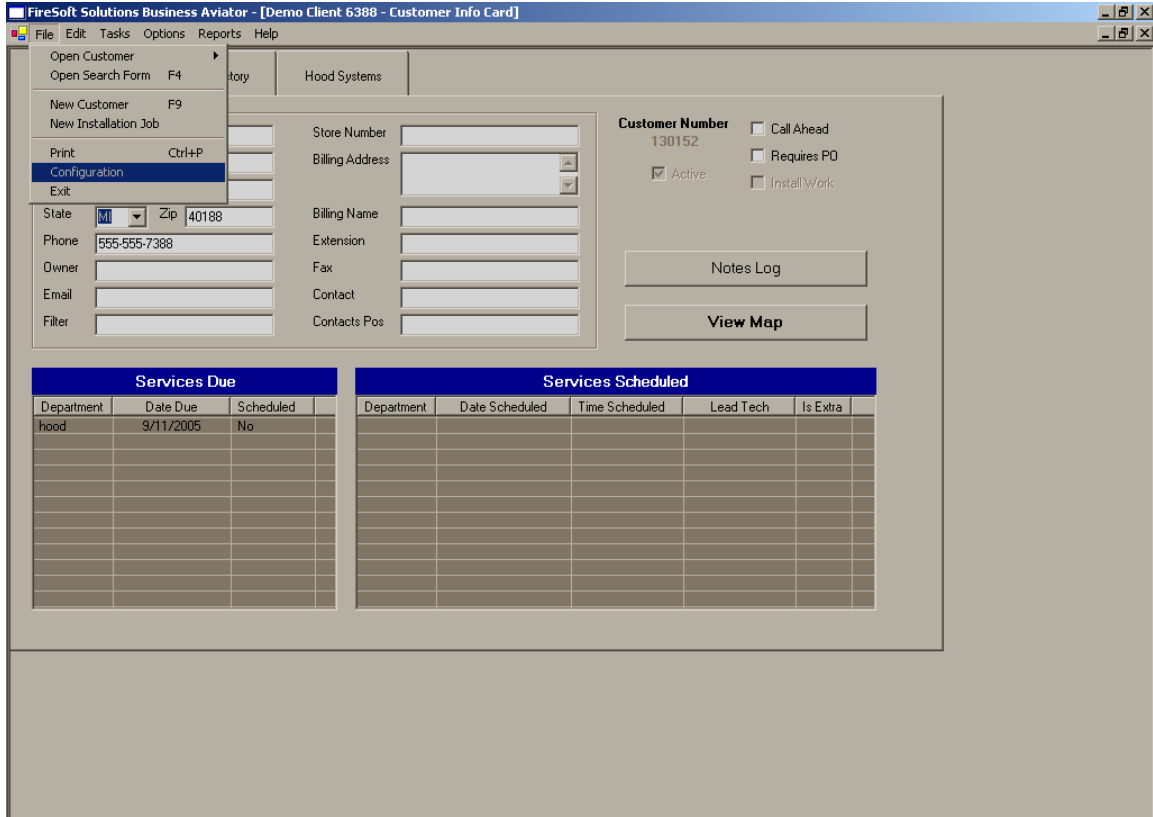
By default, the customer look-up tab is selected, where search criteria can be specified to locate customers in the system.



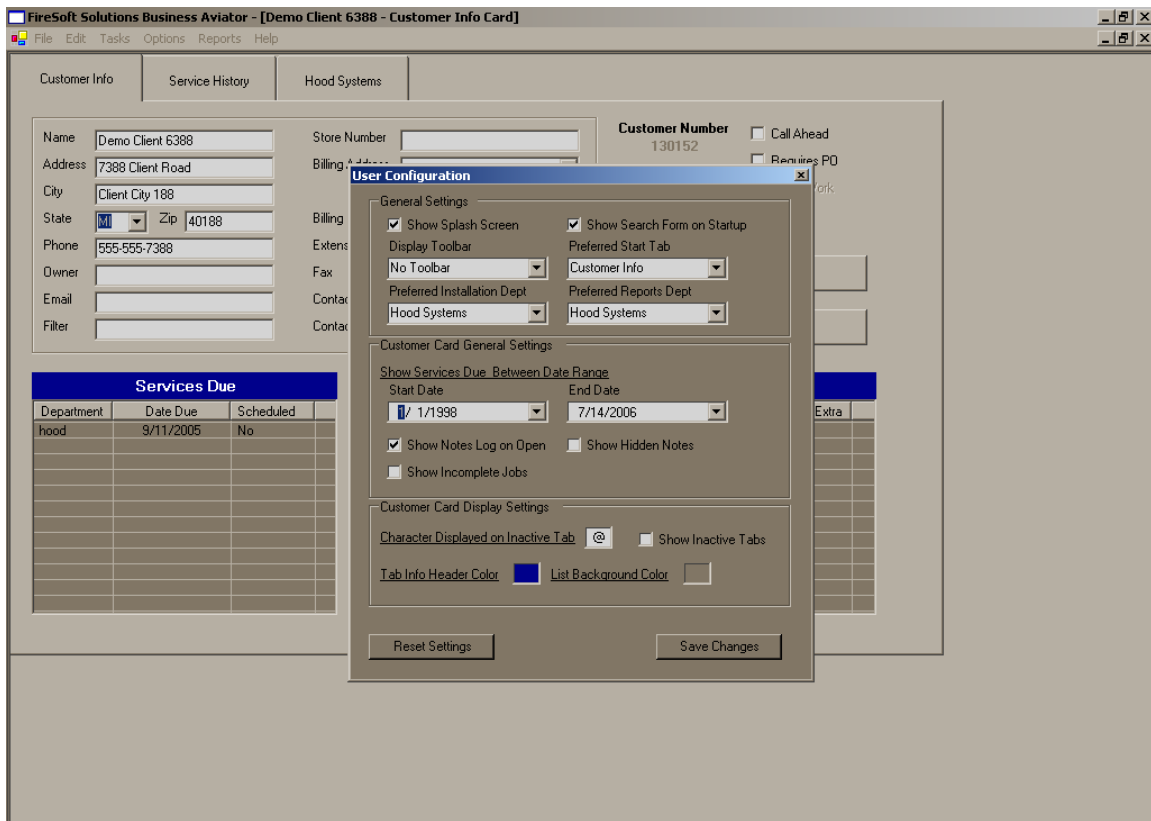
In this screenshot, we searched for customers with an 'Active' status in the system, which had the Hood Systems department serviced by our company.



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.

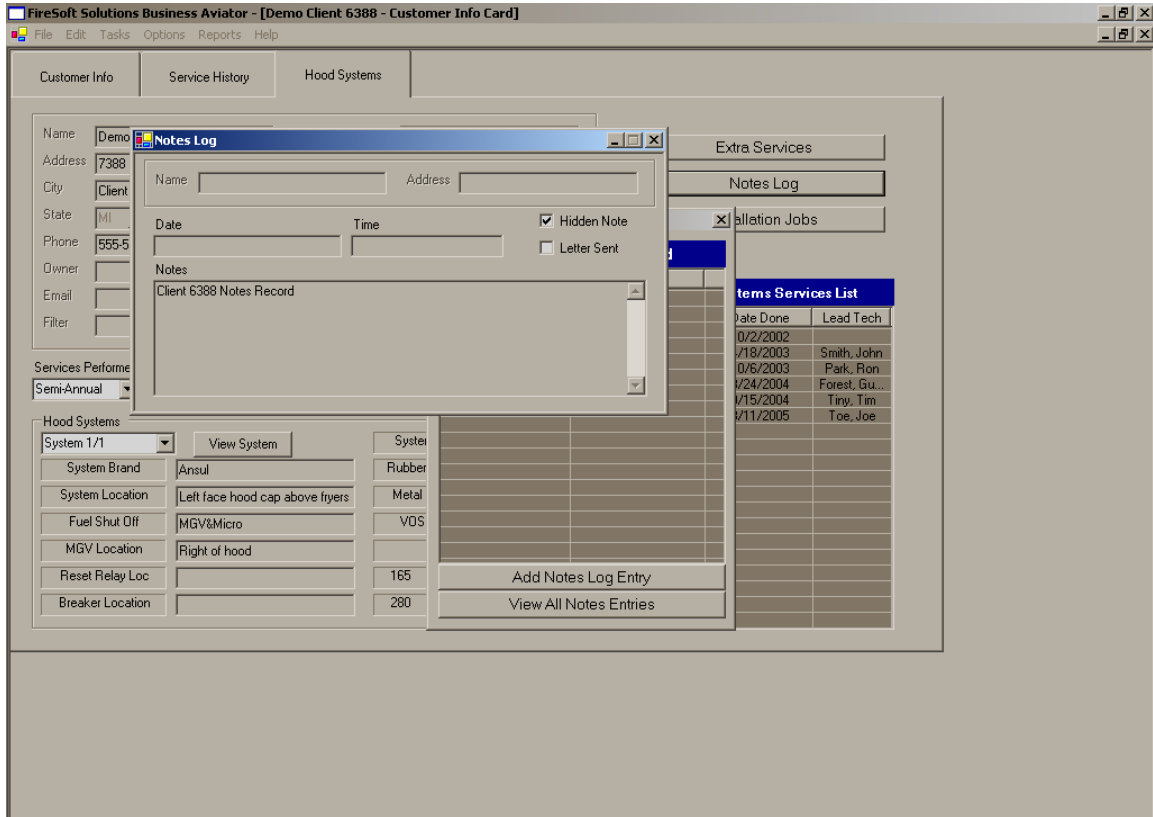
The screenshot shows the 'Hood Systems' tab in the 'Demo Client 6388 - Customer Info Card' window. The interface is divided into several sections:

- Customer Info:** Fields for Name (Demo Client 6388), Address (7388 Client Road), City (Client City 188), State (MI), Zip (40188), Phone (555-555-7388), and Owner.
- Service History:** Fields for Store Number, Billing Address, Billing Name, Extension, Fax, Contact, and Contacts Pos.
- Services Performed:** A dropdown menu set to 'Semi-Annual' and a 'Best Service Time' field.
- Hood Systems:** A detailed view for 'System 1/1' with a 'View System' button. It includes fields for System Brand (Ansul), System Location (Left face hood cap above fryers), Fuel Shut Off (MGV&Micro), MGV Location (Right of hood), Reset Relay Loc, and Breaker Location. It also shows System Model (R102 T-9) and Rubber BO Caps.
- Number of Links:** A table with columns for 165, 500, and 360, and rows for 0 and 4.
- Hood Systems Services List:** A table with columns for Due Date, Date Done, and Lead Tech. The list includes several entries, with the most recent one highlighted in blue.

Due Date	Date Done	Lead Tech
10/2/2002	10/2/2002	
4/2/2003	4/18/2003	Smith, John
10/18/2003	10/6/2003	Park, Ron
4/6/2004	3/24/2004	Forest, Gu...
9/24/2004	9/15/2004	Tiny, Tim
3/15/2005	3/11/2005	Toe, Joe
9/11/2005		



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'

FireSoft Solutions Business Aviator - [Service Card]

File Edit Reports Help

Name: Demo Client 6388 Address: 7388 Client Road Phone: 555-555-7388

Service Information

Service Number: 134527 Date Scheduled: 3/10/2005

Service Contact Person: Felisha Time Scheduled: 8:00 AM

Contact Person's Position: Manager Duration of Service:

Estimated Price: 6388.0000 Bill To: Demo Client 6388

Department: Hood Systems

Active  Complete  Incomplete

Buttons: Add to Schedule, Mark As Complete, Mark As Incomplete, Print Inspection Rpt

Inspection Report Notes: Demo Inspection Report Notes Entry 6388

Technicians: Last Name: Joe, Joe

Service Details: LB Ts&C-02 K-1, 3/05 LBE

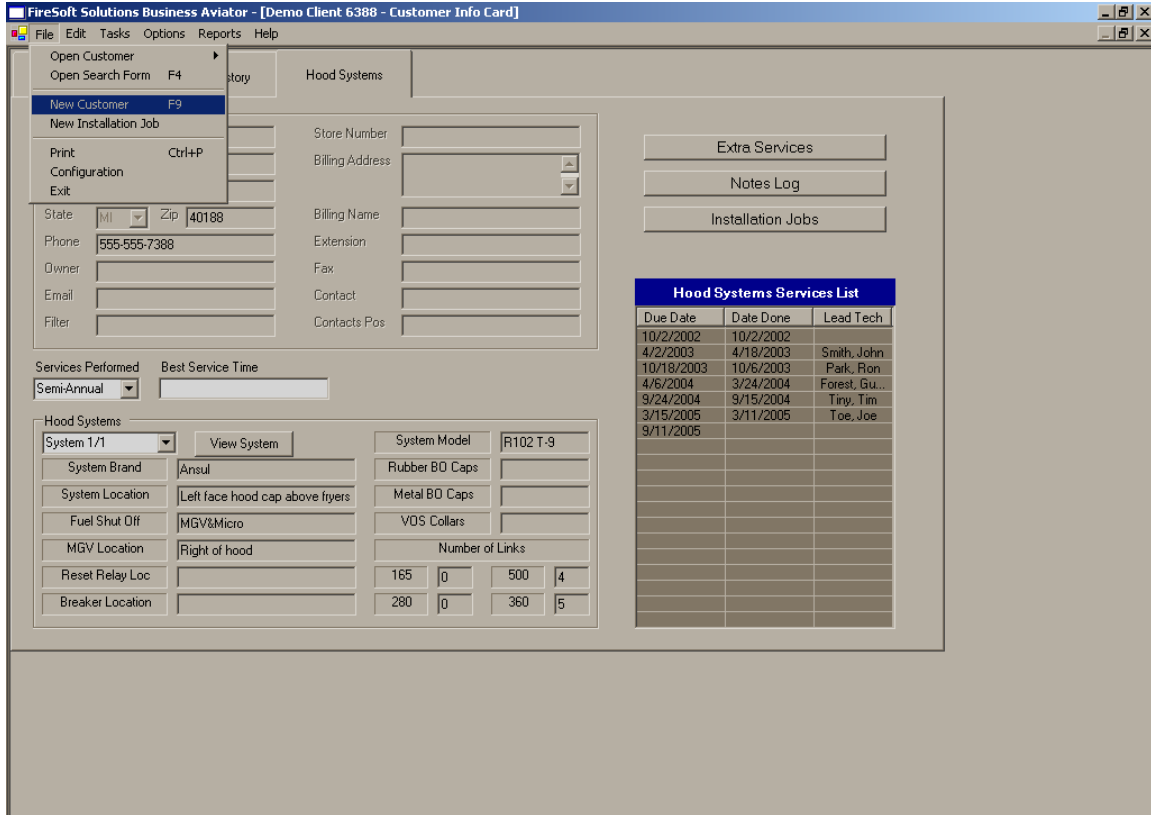
This particular service has already been marked as complete, so it cannot receive any further modifications.

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

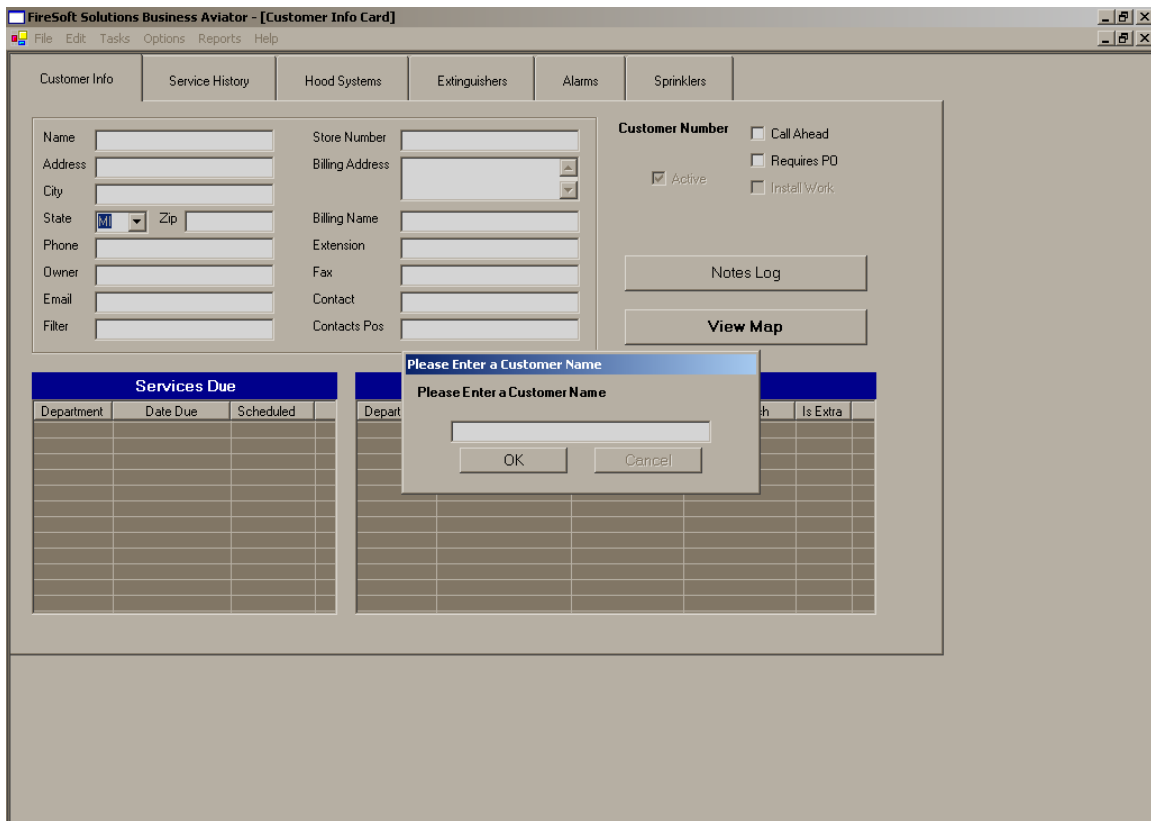
The screenshot shows a software window titled "FireSoft Solutions Business Aviator - [Service Card]". The window contains a form for entering service information. At the top, there are fields for Name (Demo Client 6388), Address (7388 Client Road), and Phone (555-555-7388). Below this is a "Service Information" section with fields for Service Number (425964), Date Scheduled, Service Contact Person (Felisha), Time Scheduled, Contact Persons Position (Manager), Duration of Service, Estimated Price (6388.0000), and Bill To (Demo Client 6388). To the right of these fields are buttons for "Add to Schedule", "Mark As Complete", "Mark As Incomplete", and "Print Inspection Rpt". Below the buttons is a "Department" dropdown menu set to "Hood Systems" and checkboxes for "Active", "Complete", and "Incomplete". At the bottom of the form, there are three panels: "Inspection Report Notes" (containing "Demo Inspection Report Notes Entry 6388"), "Technicians" (with a "Last Name" header and empty rows), and "Service Details" (containing "LB Ts&C-02 K-1" and "3/05 LBE").

# Adding a new Customer

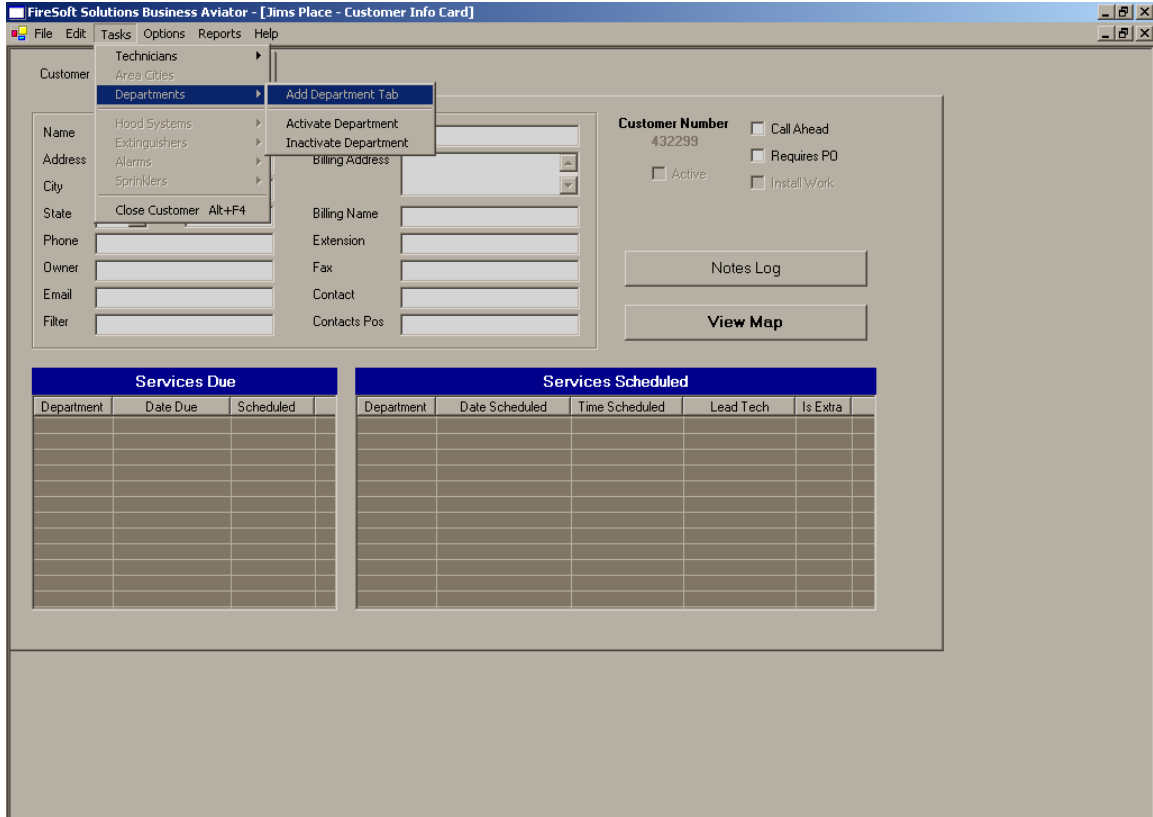
From the File menu, you can select to add a new customer to the system.



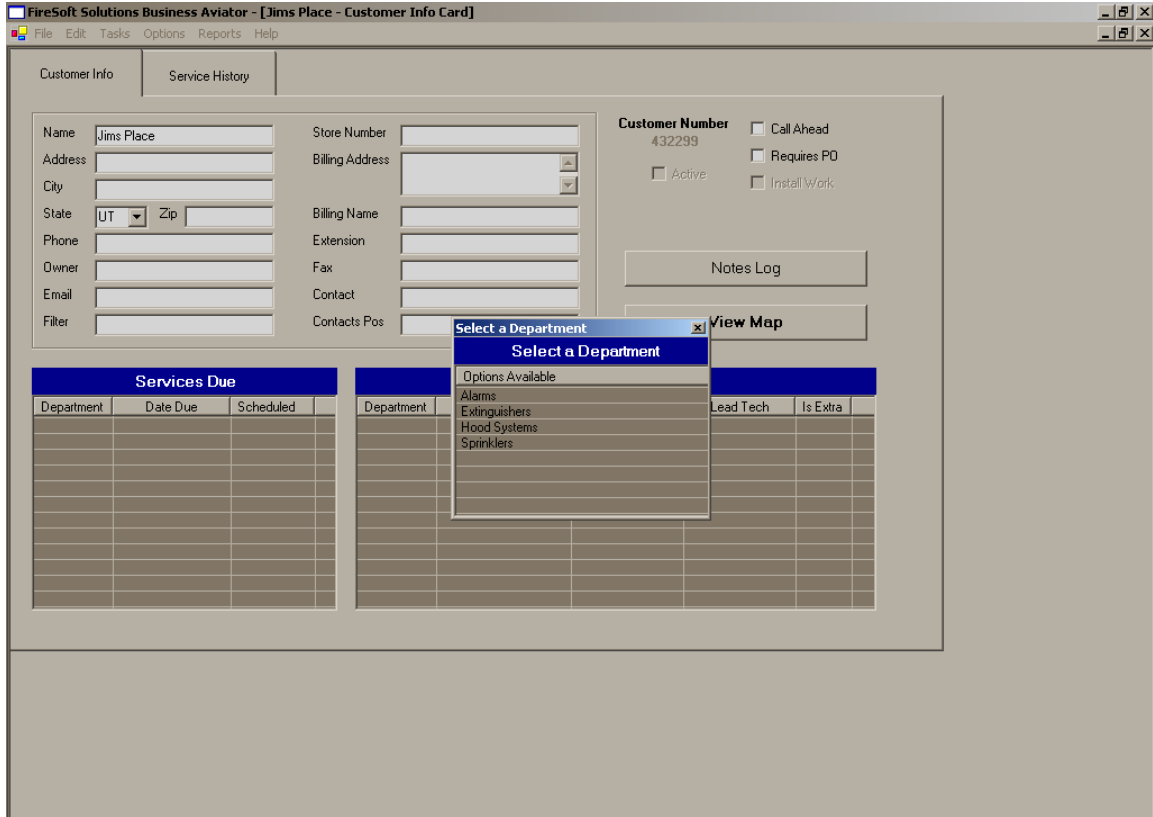
You will be prompted to enter a name for the customer. This is the only 'required' field for the customer at the time of demo release



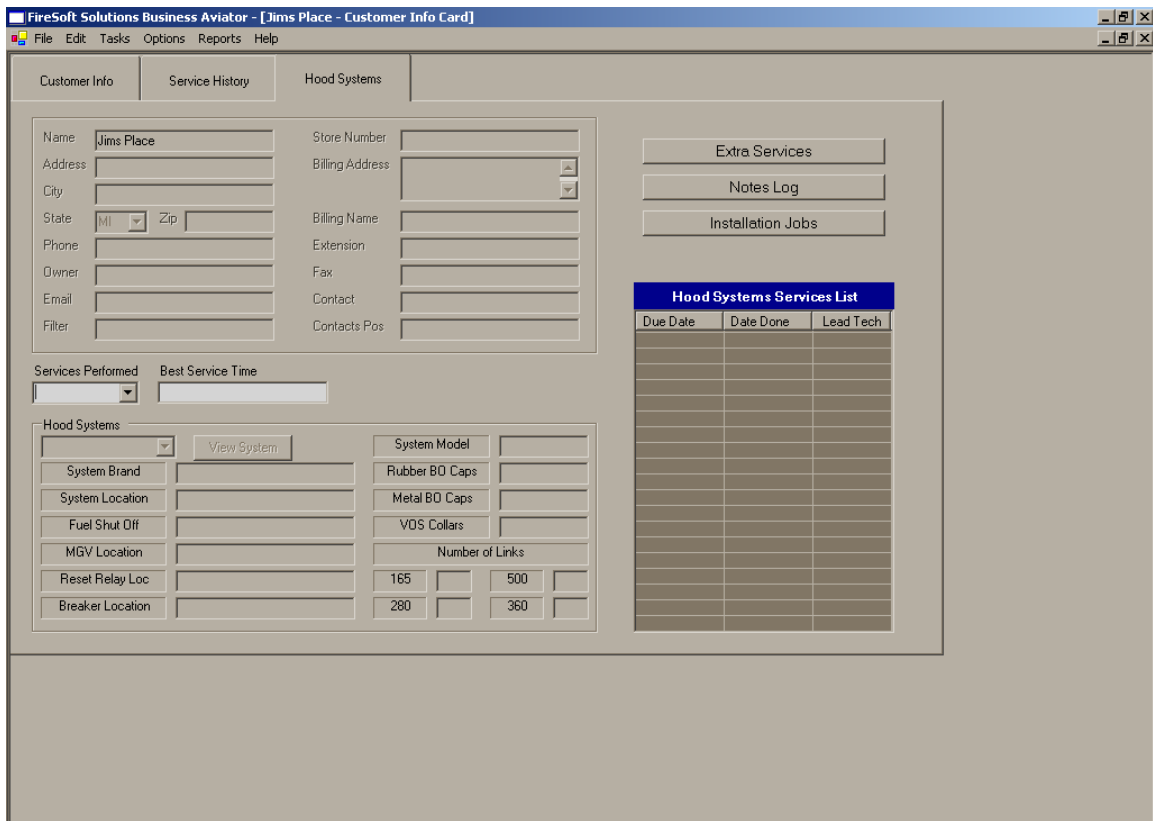
Once you have entered a name, you can edit address, phone number and other information. Next you will likely want to add a department to this customer. This is done from the Tasks menu.



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.

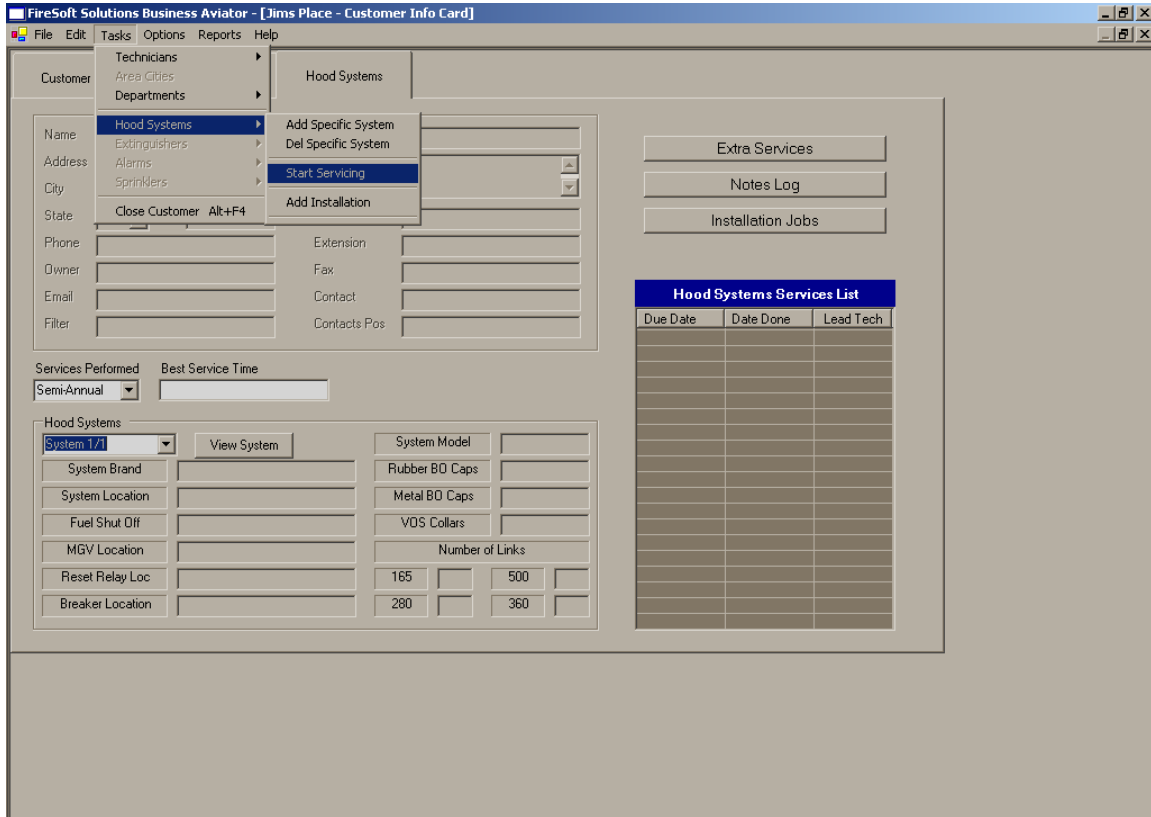
The screenshot shows the 'FireSoft Solutions Business Aviator' interface for a customer named 'Jims Place'. The window title is 'FireSoft Solutions Business Aviator - [Jims Place - Customer Info Card]'. The interface is divided into several sections:

- Customer Info:** Fields for Name (Jims Place), Address, City, State (MI), Zip, Phone, Owner, Email, Filter, Store Number, Billing Address, Billing Name, Extension, Fax, Contact, and Contacts Pos.
- Services Performed:** A dropdown menu is open, showing options: Annually, Semi-Annual (highlighted), Quarterly, Monthly, and Bi-Monthly. A 'Best Service Time' field is also present.
- System Configuration:** Includes a 'View System' button, 'System Model', 'Rubber BO Caps', 'Metal BO Caps', 'VDS Collars', and a 'Number of Links' section with input fields for 165, 500, 280, and 360.
- Buttons:** 'Extra Services', 'Notes Log', and 'Installation Jobs' buttons are located on the right side.
- Hood Systems Services List:** A table with columns 'Due Date', 'Date Done', and 'Lead Tech'.

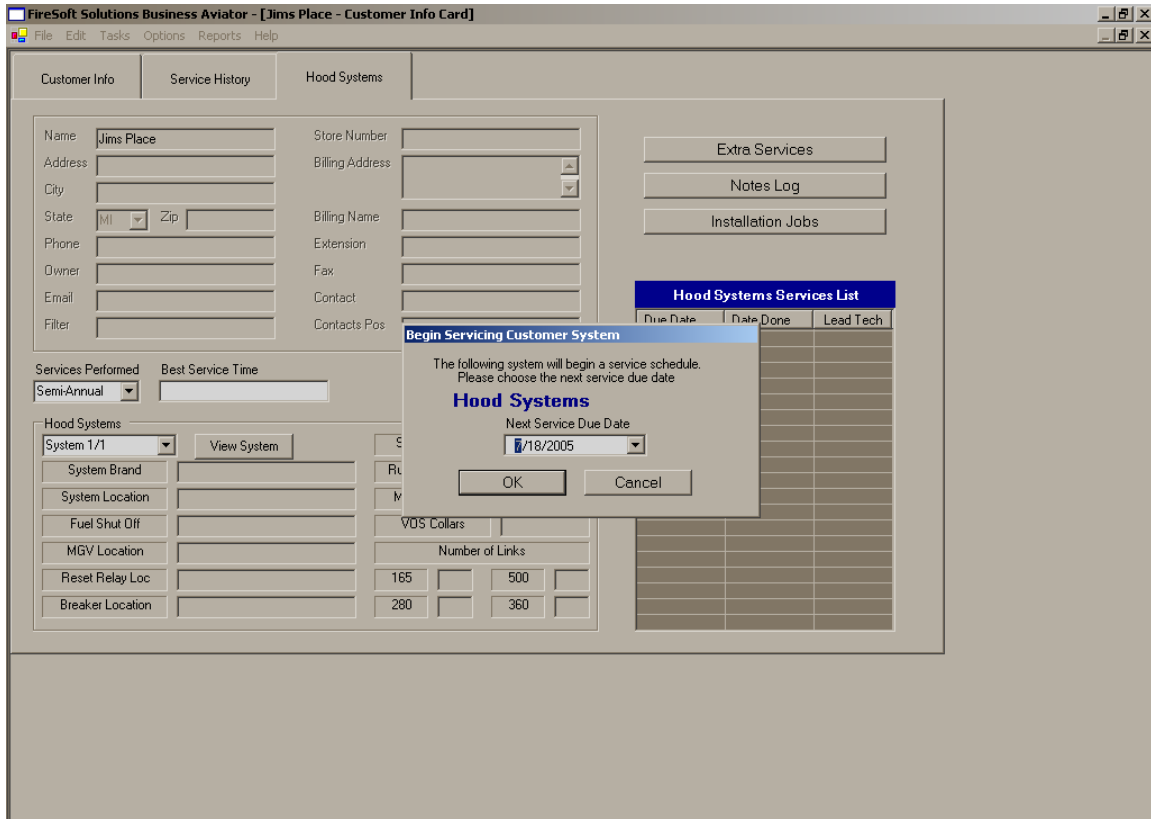




Once you have completed entering the information, or if you have skipped this part, you may want to begin services for the customer. This only has to be done once after you create a customer, or after a customer has been re-activated from a prior de-activation.



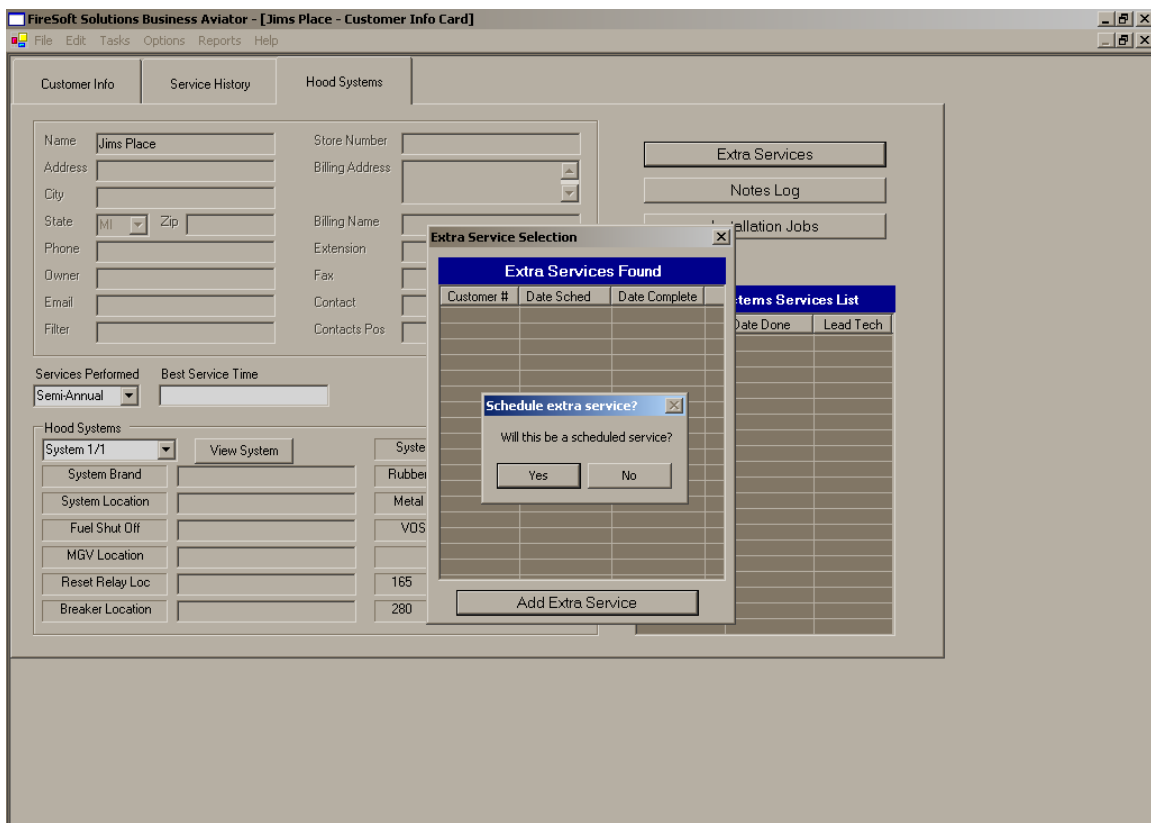
You will be prompted to choose the date this customer departments next service is due. If you don't know at this time, you can still click OK because it can be overridden at any time.



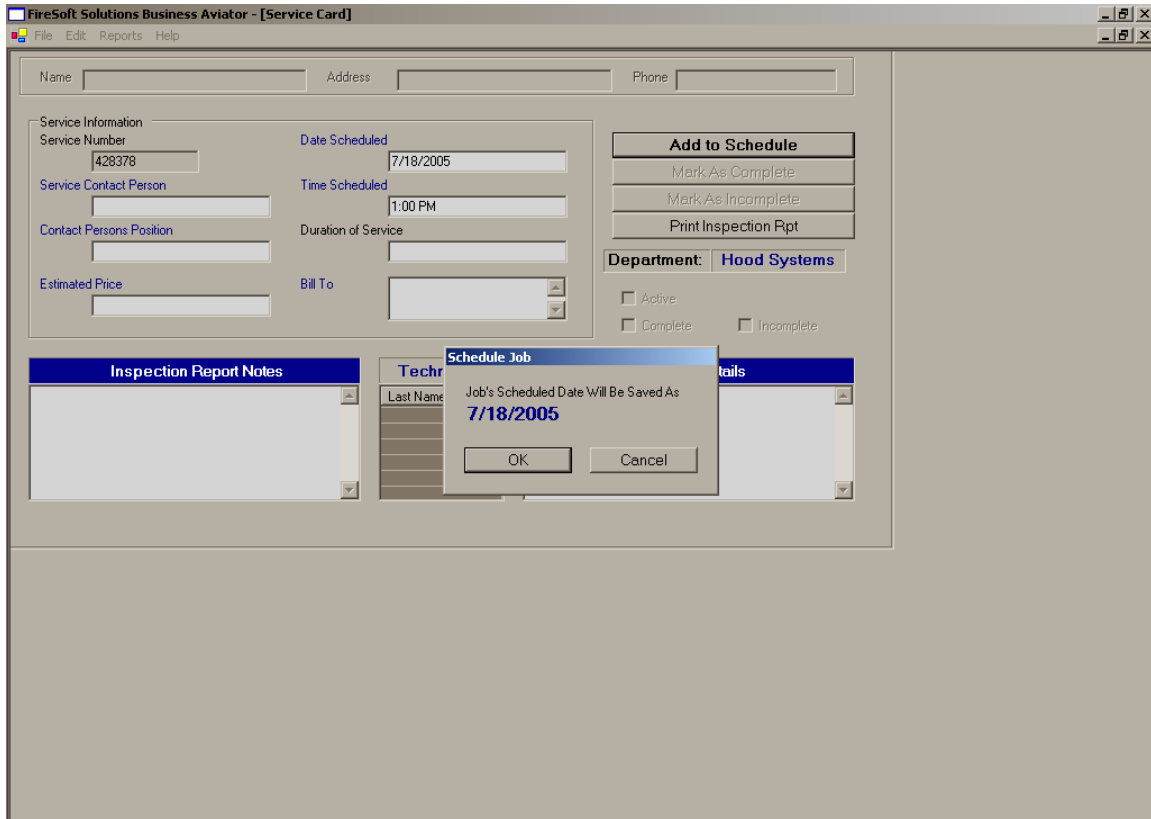


Extra services can be performed outside the normal service schedule in a department by clicking on 'Extra Services'. Most of the time, extra services include emergency services or immediate service requests for whatever reason.

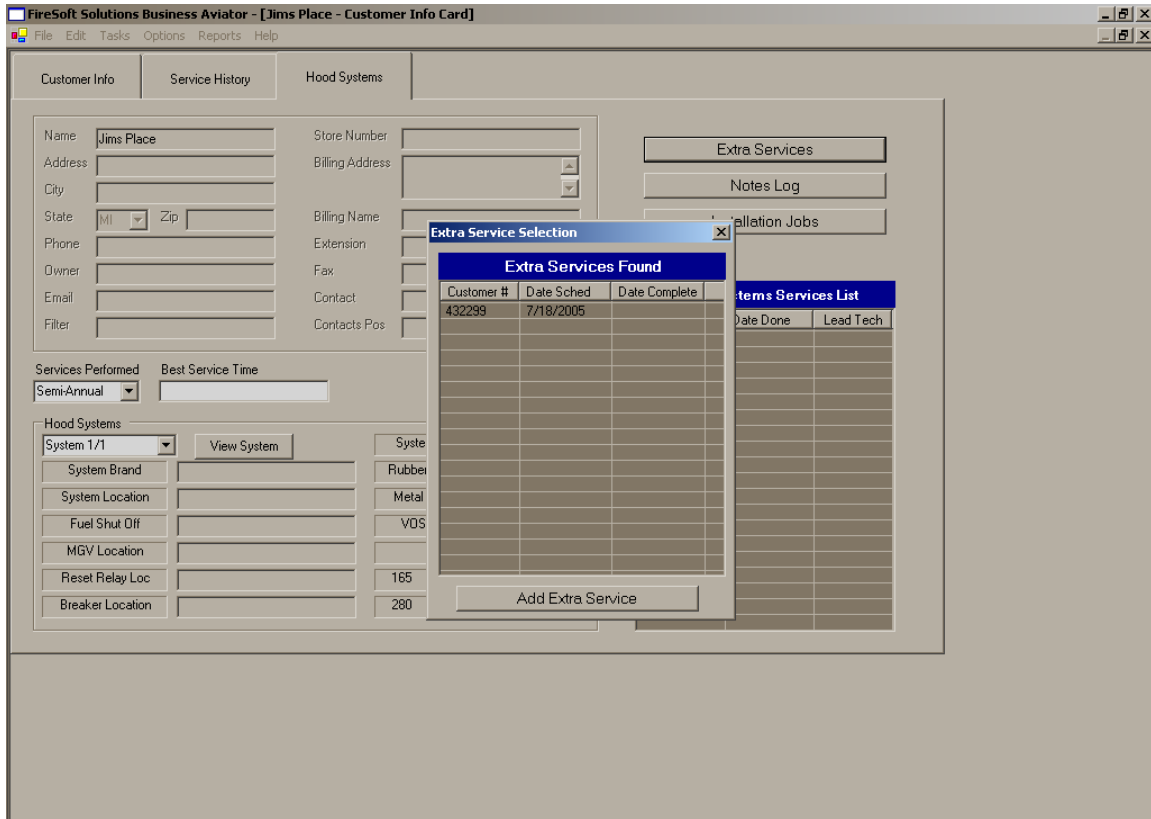
When 'Add Extra Service' is chosen, you will be prompted to specify whether this is a scheduled service or not. If the service is to be performed at a later date (it is being scheduled) you could choose to schedule the service by choosing 'Yes'; if the service needs immediate attention, you may want 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.

FireSoft Solutions Business Aviator - [Jims Place - Customer Info Card]

File Edit Tasks Options Reports Help

Customer Info Service History Hood Systems

Name: Jims Place Store Number: [ ] Customer Number: 432299  Call Ahead

Address: [ ] Billing Address: [ ]  Requires PO

City: [ ]  Active  Install Work

State: [IL] Zip: [ ] Billing Name: [ ]

Phone: [ ] Extension: [ ]

Owner: [ ] Fax: [ ]

Email: [ ] Contact: [ ]

Filter: [ ] Contacts Pos: [ ]

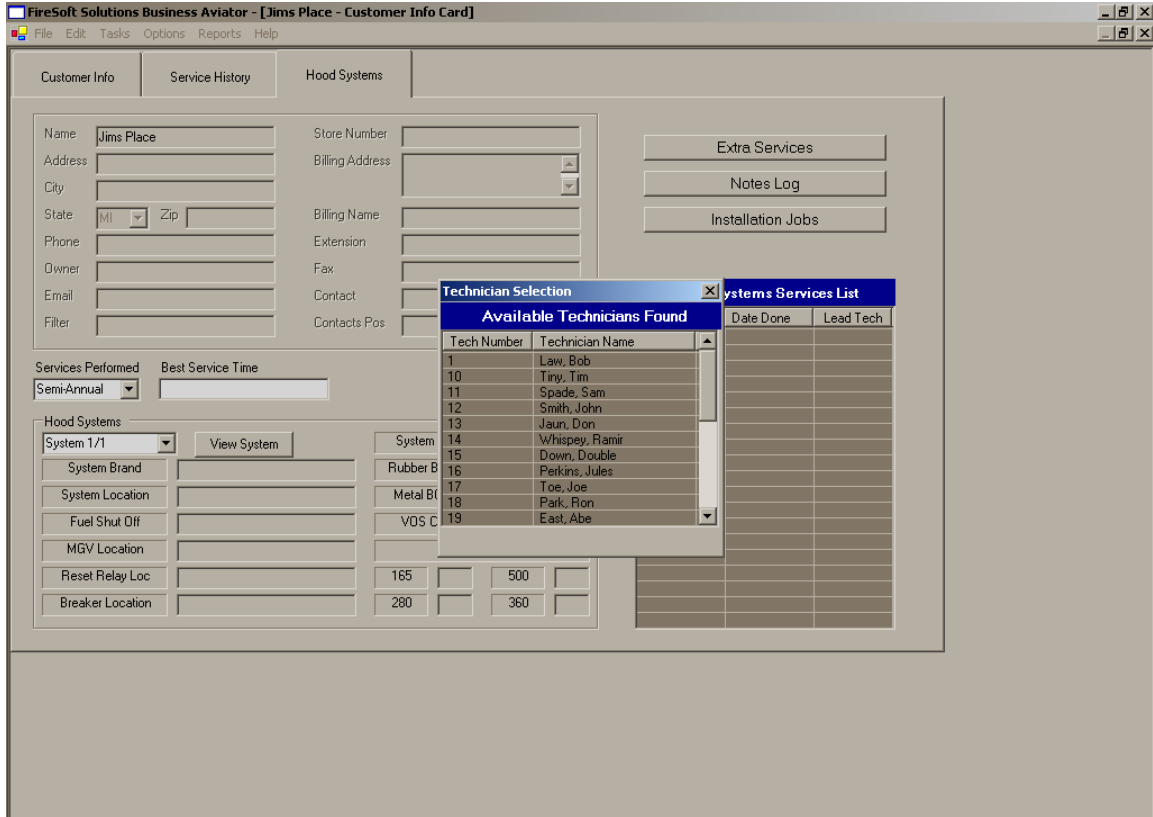
Notes Log

View Map

Services Due			Services Scheduled				
Department	Date Due	Scheduled	Department	Date Scheduled	Time Scheduled	Lead Tech	Is Extra
hood	7/18/2005	No	hood	7/18/2005	1:00 PM		Yes
hood	7/18/2005	Yes					

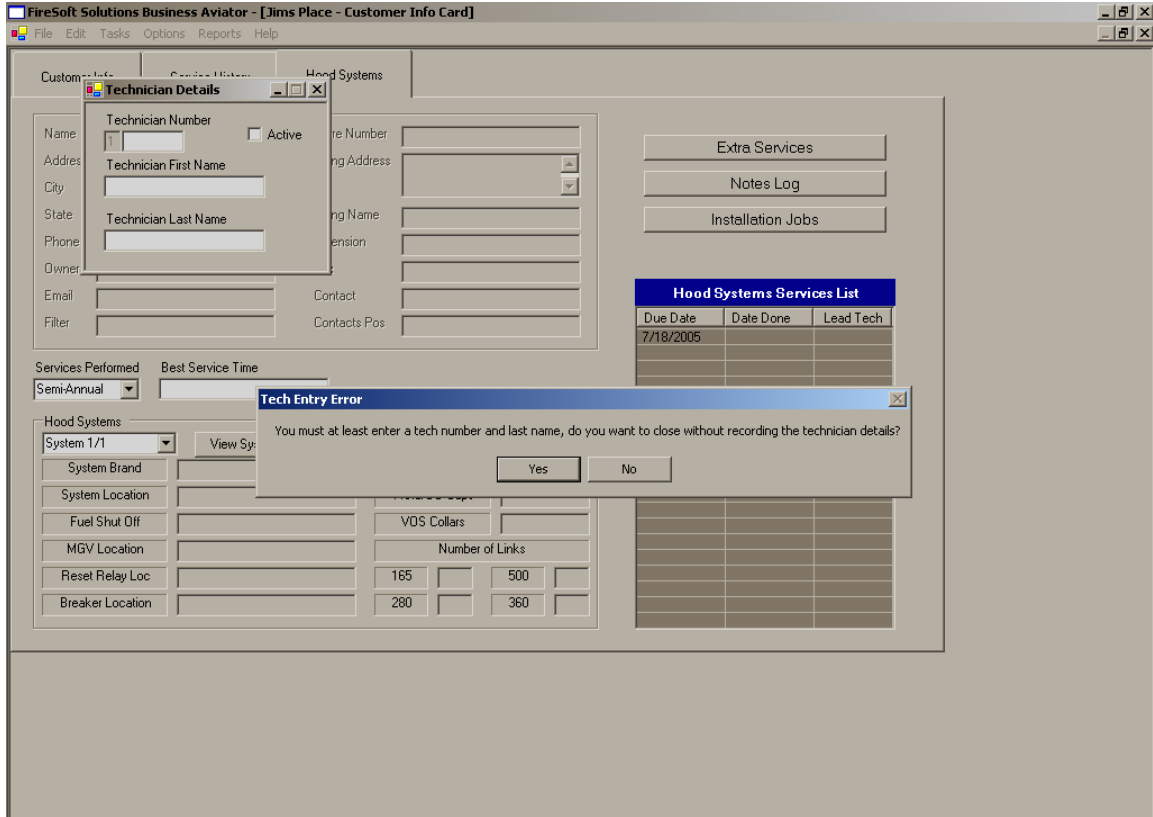


Choosing to edit technicians in the department provides a list of currently available technicians to select from. From here, the technician is selected and any modifications can be made.



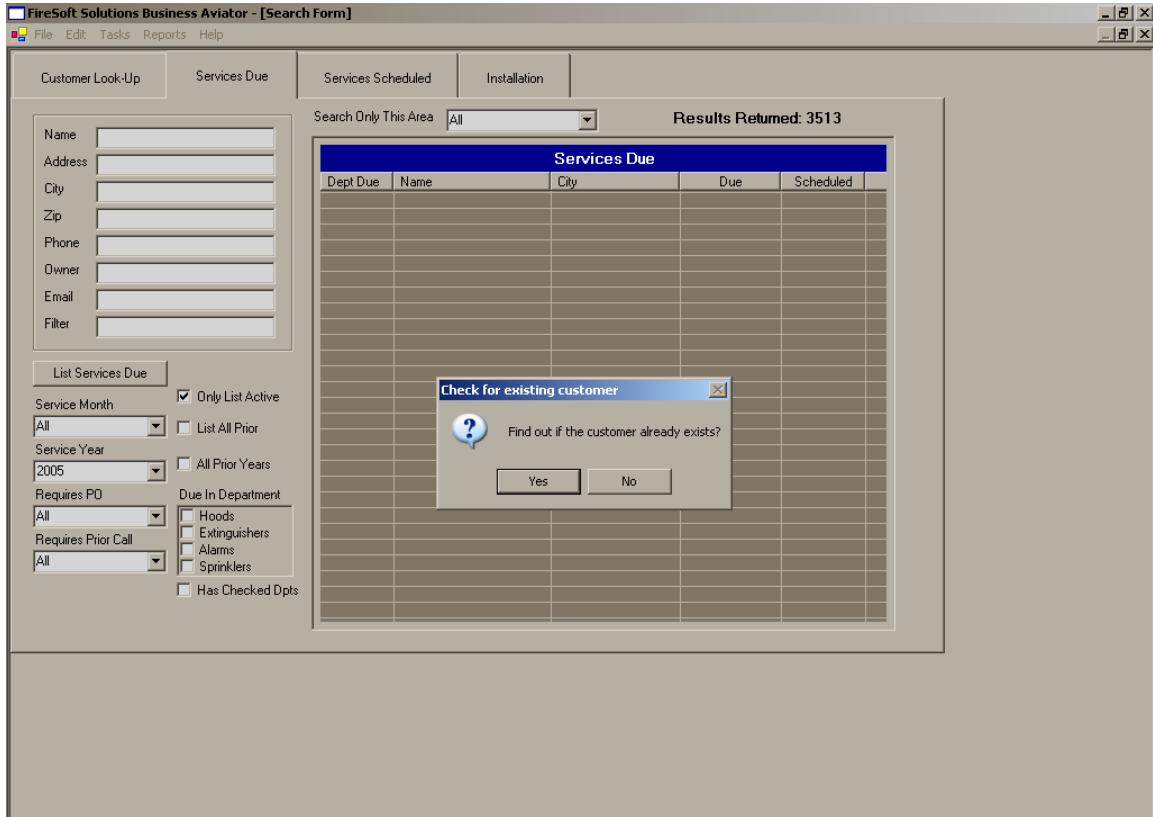


Like any other record addition in the system, if the required information is not entered, you will be notified and provided an option to correct this or discontinue record addition.

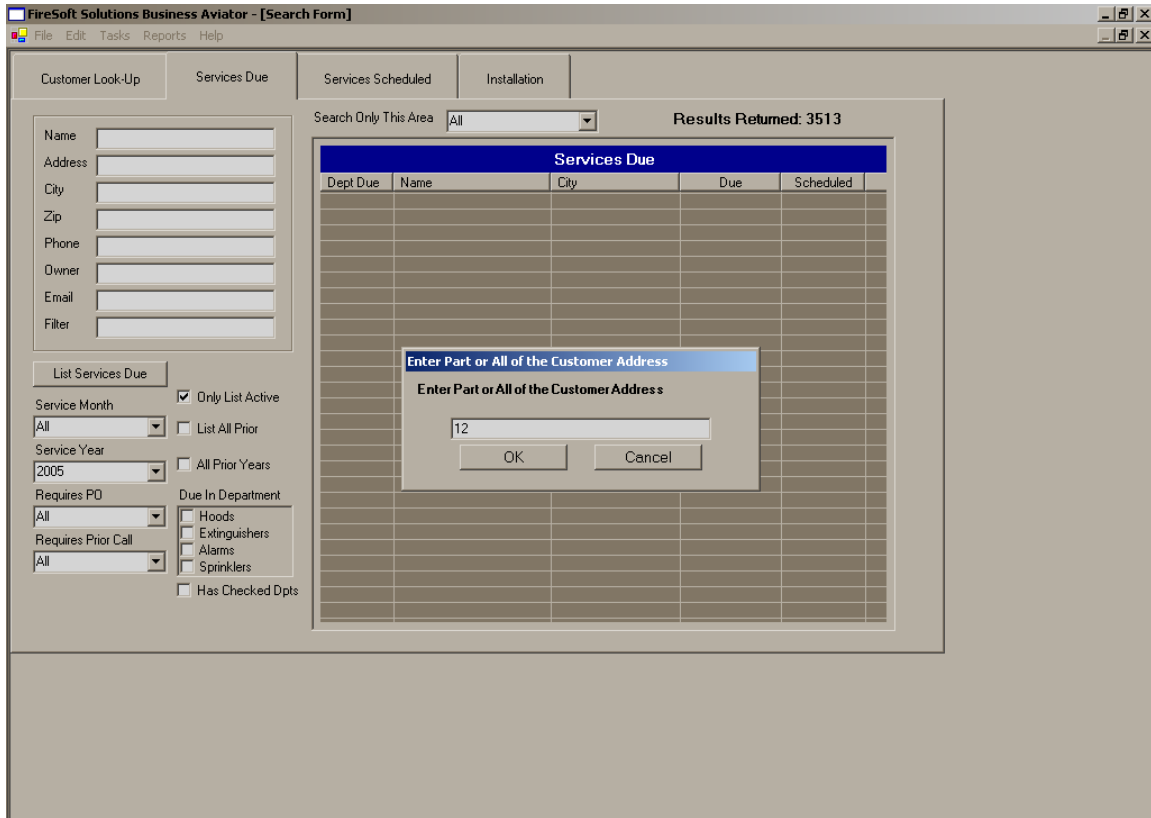




You will be prompted to find out if the customer for which you are adding the installation already exists in the database. Generally you will want to choose 'Yes' just to make sure, unless you are positive this installation is not for someone that was previously serviced by your company.

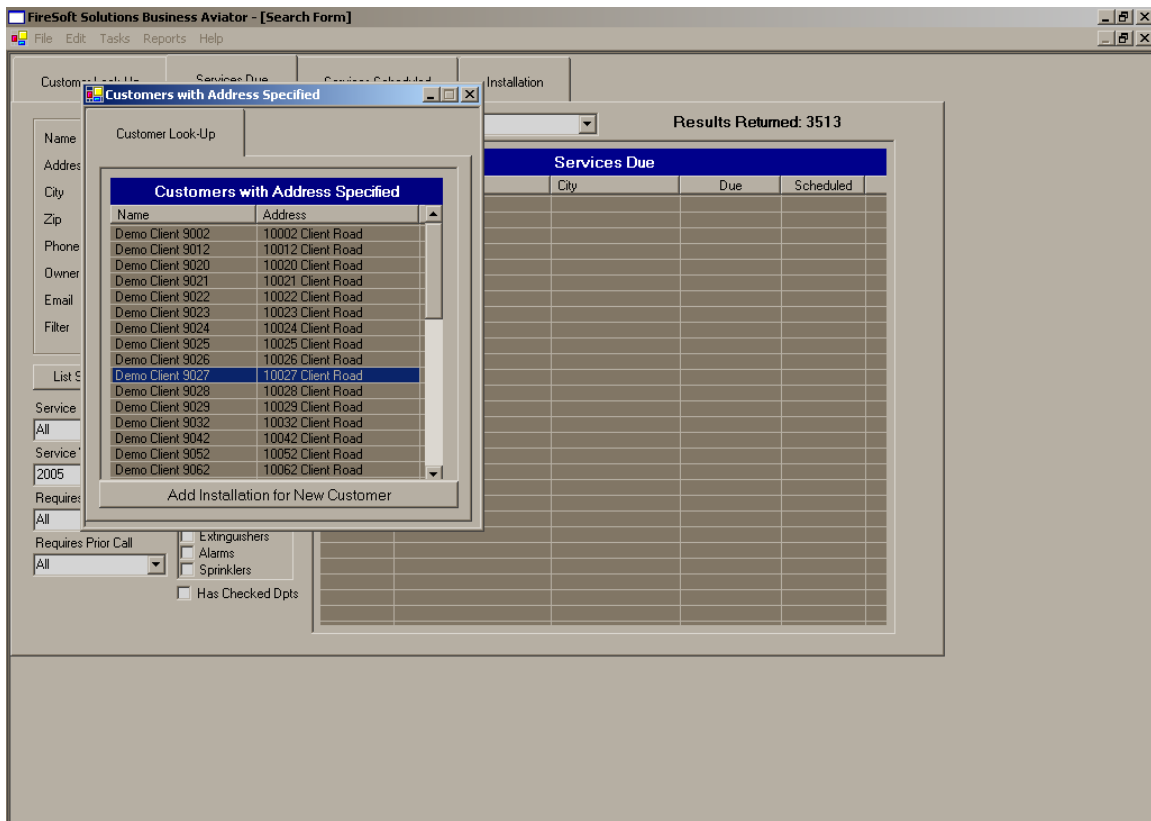


If you choose to find out if the customer exists, you will be prompted to enter part of the customer's address to locate them. The address entered does not have to be full, and it is best if you only enter a portion of the address to make sure someone else didn't enter the address slightly different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



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.

FireSoft Solutions Business Aviator - [Installation Job Information]

File Edit Reports Help

**Job Information**

Job Name: Jim's Bikes Store Number: [ ]

Address: [ ] Billing Address: [ ]

City: [ ]

State: MI Zip: [ ] Billing Name: [ ]

Phone: [ ] Extension: [ ]

Owner: [ ] Fax: [ ]

Email: [ ] Contact: [ ]

Filter: [ ] Contacts Pos: [ ]

**Job Reference Number**

Job Reference Number: 200573447

Job Customer Name: [ ]

Job Status: [ ]

Salesman: [ ]

Job Contact: [ ] Job Contact Phone: [ ]

Notes Log Puff Test Job Worksheet

**System and Gas Valve Information**

None Available Add Remove None Available

System Type: [ ] Gas Valve Type: [ ]

System Brand: [ ] Gas Valve Size: [ ]

System Size: [ ] Delivered Date: [ ]

**Job Details Information**

Scheduled Date: [ ] Job Start Date: [ ]

Ceiling Type: [ ] Ceiling Status: [ ]

Remote Pulls: [ ] Power Type: [ ]

Hoods Installed  Ducts Welded

Finished Walls  Flush Done

Broiler in Place  Salamander in Place

Finished Floor  All equip in place

Fast Track

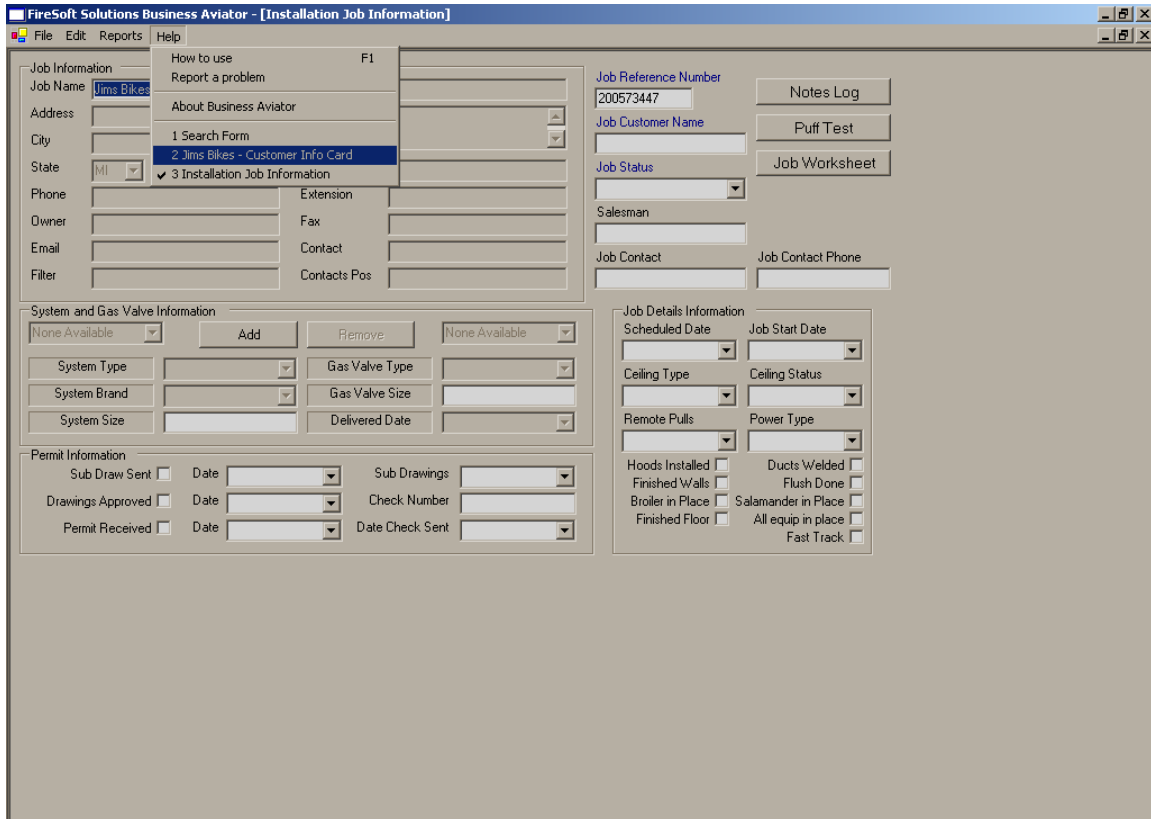
**Permit Information**

Sub Draw Sent  Date: [ ] Sub Drawings: [ ]

Drawings Approved  Date: [ ] Check Number: [ ]

Permit Received  Date: [ ] Date Check Sent: [ ]

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.

The screenshot shows a software window titled "FireSoft Solutions Business Aviator - [Jims Bikes - Customer Info Card]". The window has a menu bar with "File", "Edit", "Tasks", "Options", "Reports", and "Help". Below the menu bar are three tabs: "Customer Info", "Service History", and "Hood Systems". The "Customer Info" tab is active and contains a form with the following fields:

- Name: Jims Bikes
- Address: 123
- City: 123
- State: UT (dropdown), Zip: 123
- Phone: (empty)
- Owner: (empty)
- Email: (empty)
- Filter: (empty)
- Store Number: (empty)
- Billing Address: (empty)
- Billing Name: (empty)
- Extension: (empty)
- Fax: (empty)
- Contact: (empty)
- Contacts Pos: (empty)

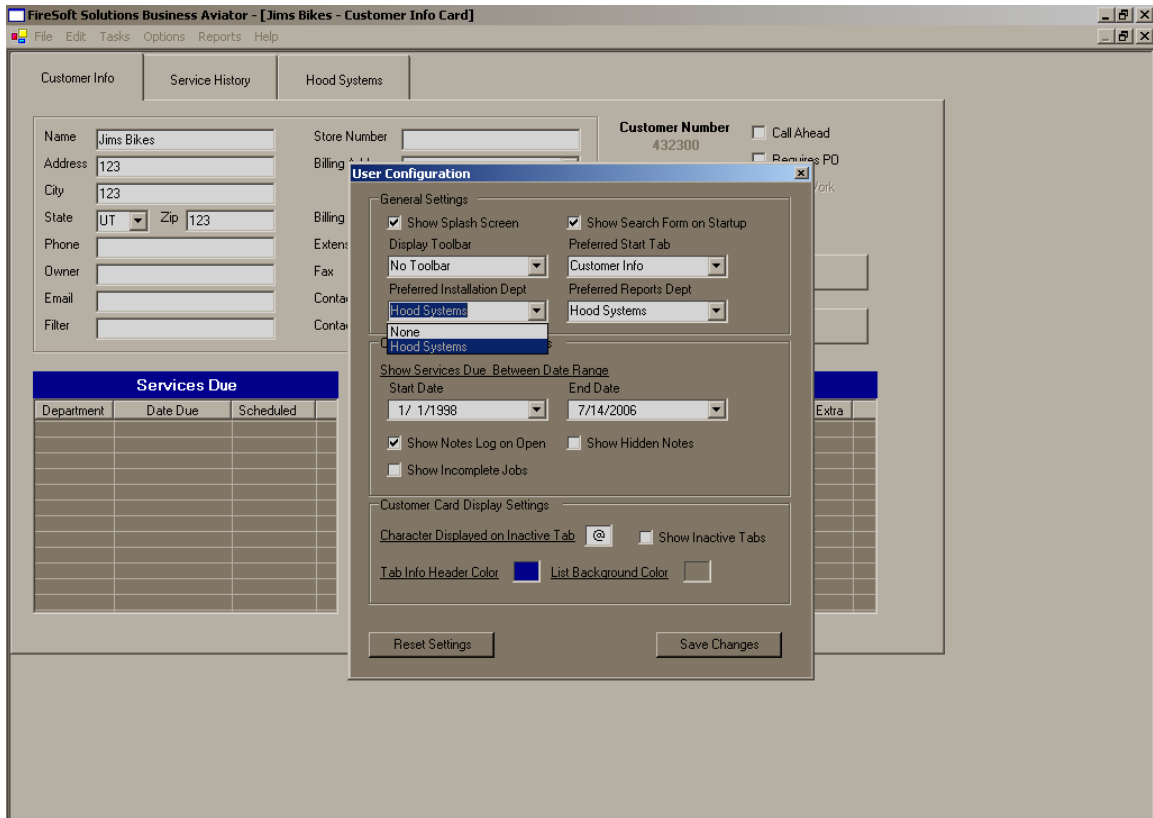
On the right side of the form, there is a "Customer Number" field with the value "432300" and three checkboxes: "Call Ahead" (unchecked), "Requires PO" (unchecked), and "Active" (checked). Below these is an "Install Work" checkbox (unchecked). There are two buttons: "Notes Log" and "View Map".

At the bottom of the form, there are two tables:

Services Due		
Department	Date Due	Scheduled

Services Scheduled				
Department	Date Scheduled	Time Scheduled	Lead Tech	Is Extra

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.

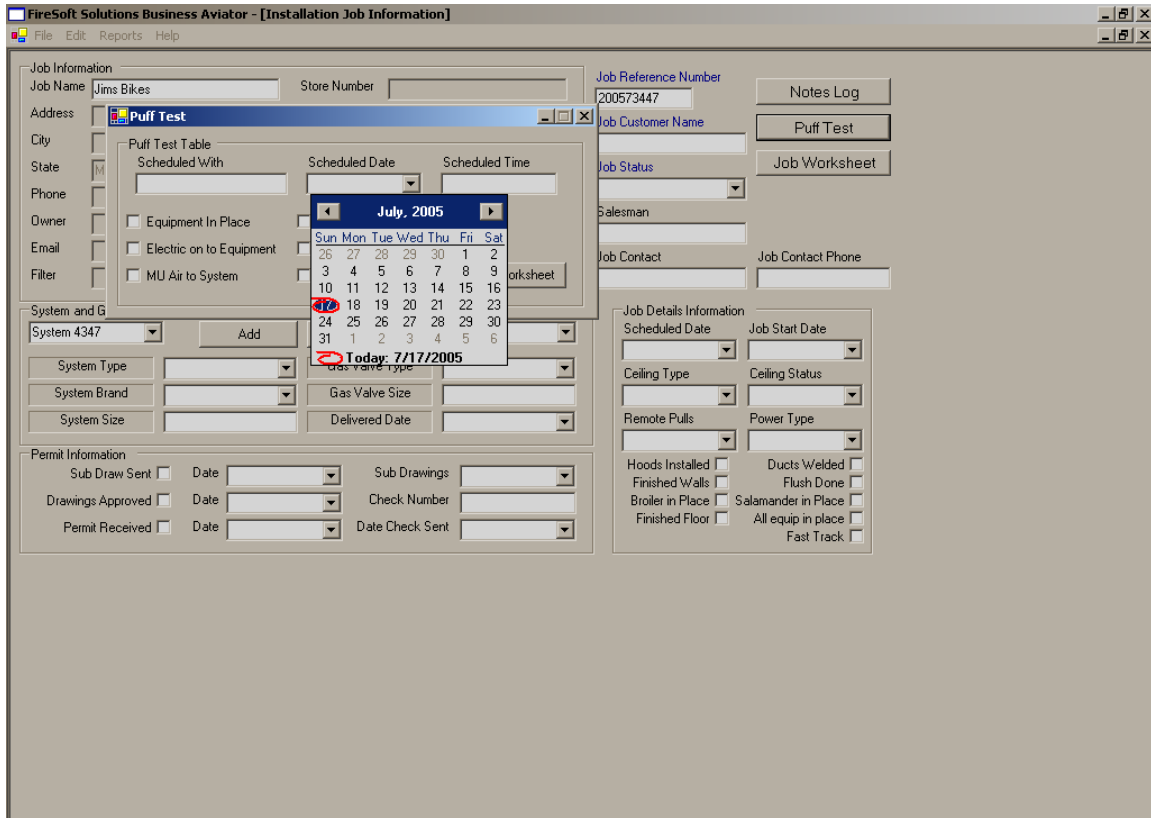


In our example, we added a system and gas valve to the installation, and choose the status: Install from the dropdown.

The screenshot shows the 'FireSoft Solutions Business Aviator - [Installation Job Information]' window. The interface is divided into several sections:

- Job Information:** Fields for Job Name (Jims Bikes), Store Number, Address, Billing Address, City, State (MI), Zip, Billing Name, Extension, Phone, Owner, Fax, Email, Contact, Filter, and Contacts Pos.
- Job Reference Number:** 200573447
- Job Customer Name:** [Empty]
- Job Status:** A dropdown menu with options: N/A, Archives, Puff Test, Repair, **Install** (highlighted), and Install Upgrade.
- Buttons:** Notes Log, Puff Test, Job Worksheet, and Job Contact Phone.
- System and Gas Valve Information:** System 4347, Add, Remove, Valve 2852, System Type, Gas Valve Type, System Brand, Gas Valve Size, System Size, and Delivered Date.
- Permit Information:** Sub Draw Sent, Date, Sub Drawings, Drawings Approved, Date, Check Number, Permit Received, Date, and Date Check Sent.
- Job Details Information:** Scheduled Date, Job Start Date, Ceiling Type, Ceiling Status, Remote Pulls, Power Type, Hoods Installed, Ducts Welded, Finished Walls, Flush Done, Broiler in Place, Salamander in Place, Finished Floor, All equip in place, and Fast Track.

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'.

Display Report - [Print preview]

File Edit View Window Help

Close Page 1

Puff Test Work Sheet

Date: 7/6/2005 Time: 12:00 PM Scheduled With: Jim

---

Jims Bikes  
(Establishment)

---

123  
(Address)

---

123.UT  
(City,State)

---

(Phone Number)

---

(Cross Streets)

---

(Bill To)

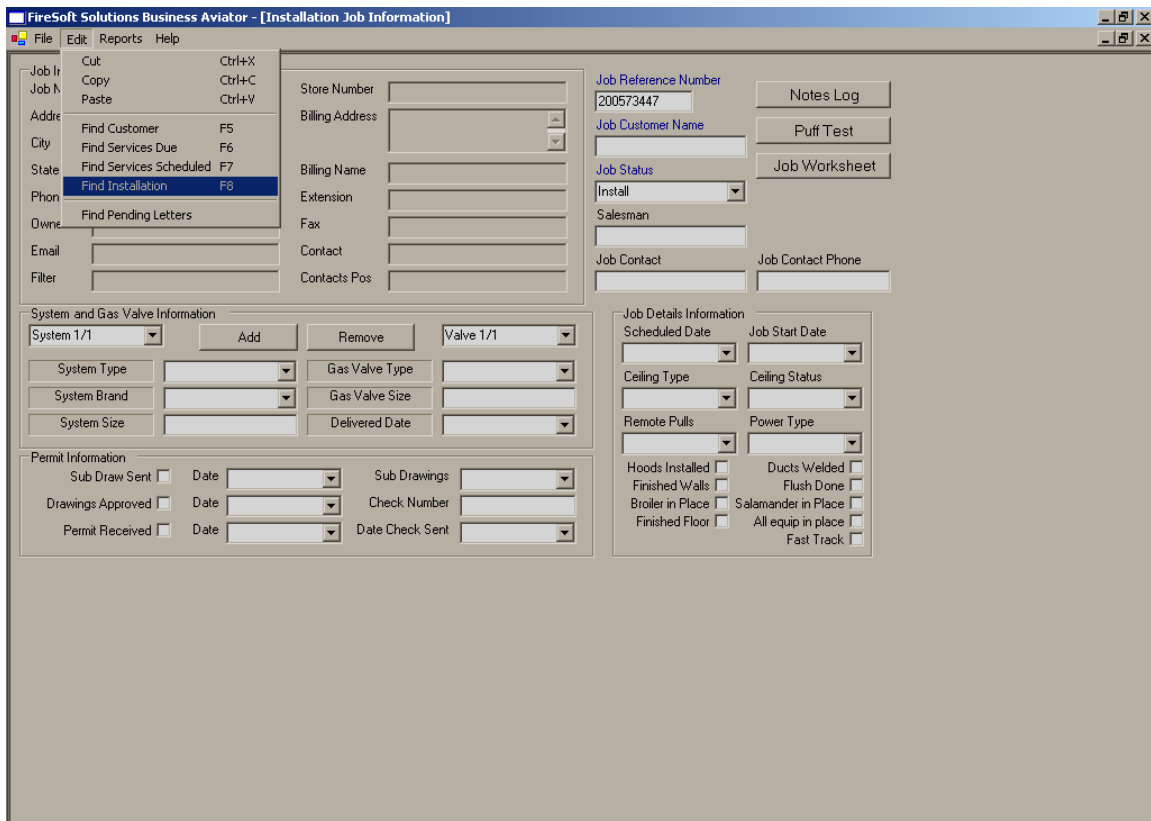
---

(Contact Person)

---

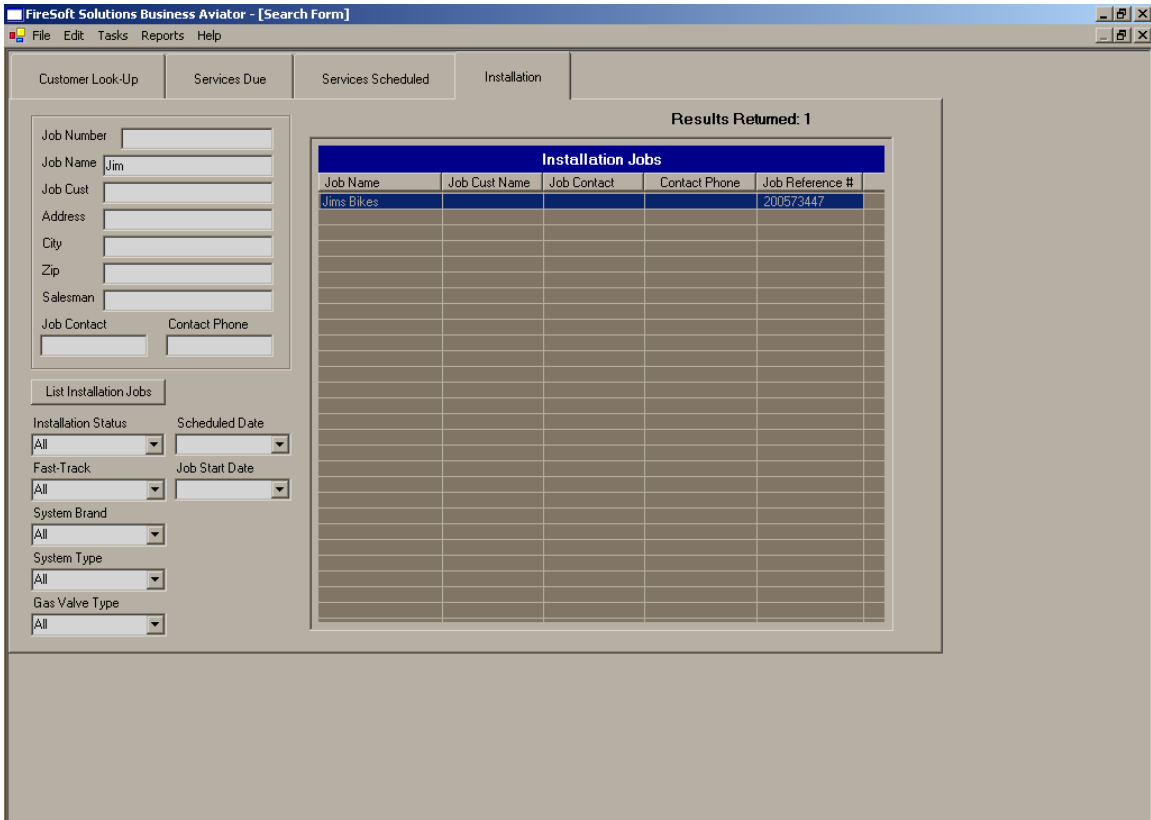
Sys Loc \_\_\_\_\_  
Type Sys R101 \_\_\_\_\_ R102 \_\_\_\_\_ Other \_\_\_\_\_  
Size/Qty Sg \_\_\_\_\_ Dbl \_\_\_\_\_ Other \_\_\_\_\_  
Links 165 \_\_\_\_\_ 280 \_\_\_\_\_ 360 \_\_\_\_\_ 450 \_\_\_\_\_ 500 \_\_\_\_\_ Noz \_\_\_\_\_  
Fuel Shut Off Elec.G. \_\_\_\_\_ MGV \_\_\_\_\_ Other \_\_\_\_\_  
Gas Valve lo \_\_\_\_\_  
Sys cov \_\_\_\_\_

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.



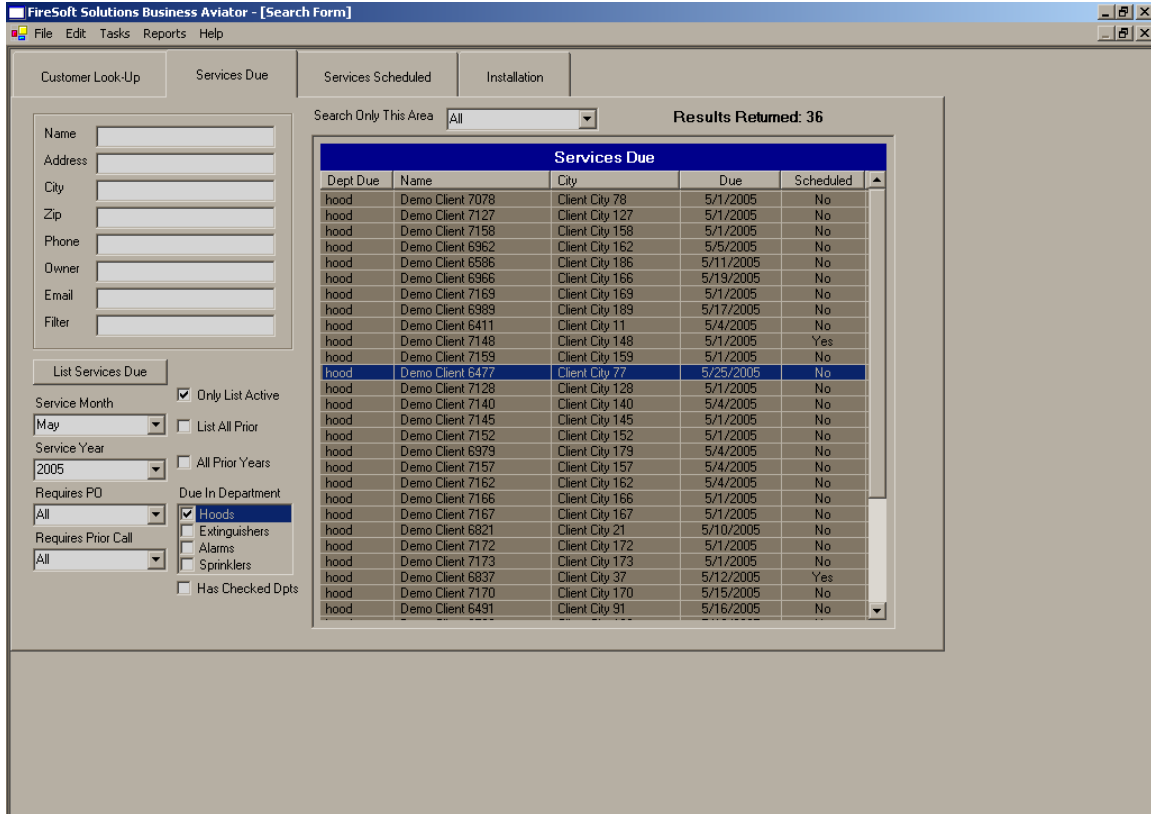
By selecting 'Install' from the Installation Status dropdown, we can list all of the current installation jobs that have 'Install' status. As you can see, the new record we created is among those listed.

The screenshot shows the 'FireSoft Solutions Business Aviator - [Search Form]' window. The 'Installation' tab is selected. On the left, there is a search form with fields for Job Number, Job Name, Job Cust, Address, City, Zip, Salesman, Job Contact, and Contact Phone. Below these fields are several dropdown menus for filtering: Installation Status (set to 'Insta'), Scheduled Date, Fast-Track, Job Start Date, System Brand, System Type, and Gas Valve Type. A 'List Installation Jobs' button is also present. On the right, a table titled 'Installation Jobs' displays 44 results. The table has columns for Job Name, Job Cust Name, Job Contact, Contact Phone, and Job Reference #.

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 Bikas				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.



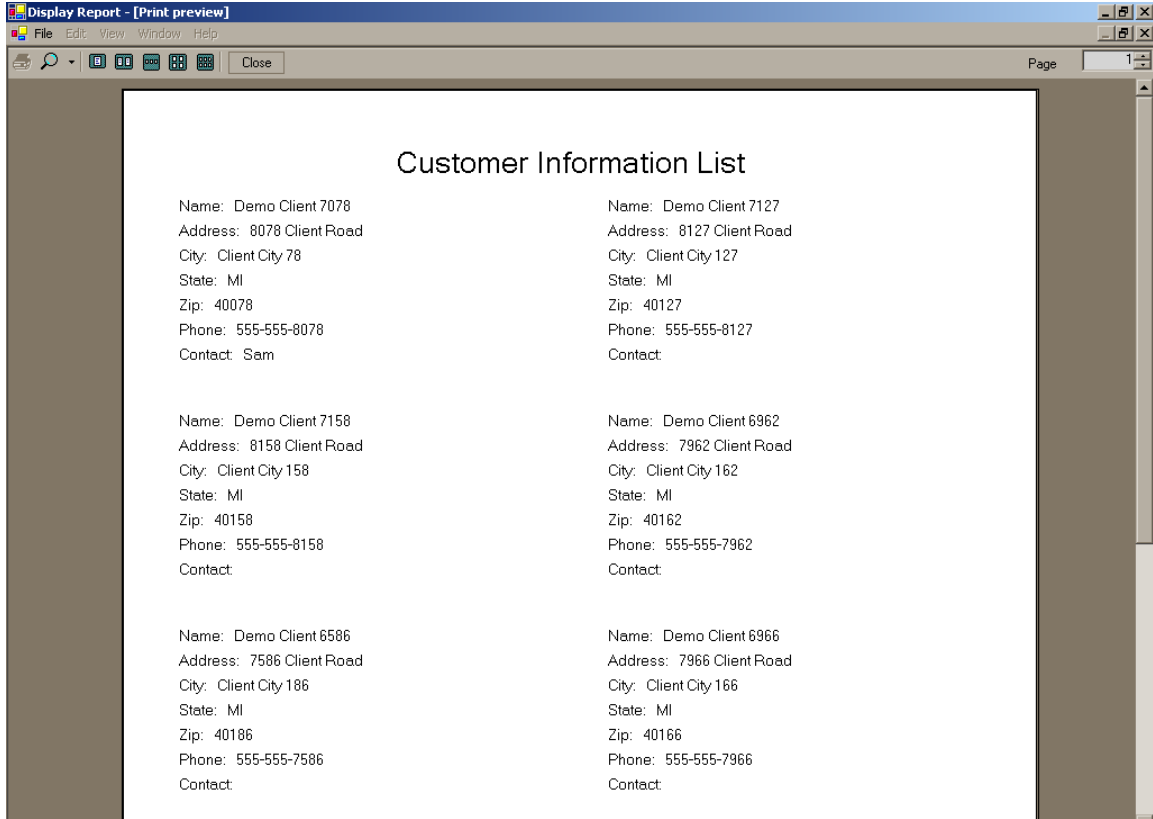
In this case, we searched for services that are due in the month of May, during the year 2005, within the Hood Systems department listing only customers that are active in our database (ones that we currently service).

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.

The screenshot shows the 'FireSoft Solutions Business Aviator - [Search Form]' window. It features a search form on the left with fields for Name, Address, City, Zip, Phone, Owner, Email, and Filter. Below these are filters for 'List Services Due', 'Service Month' (May), 'Service Year' (2005), 'Requires PD' (All), 'Requires Prior Call' (All), and 'Due In Department' (Hoods). The main area displays a table titled 'Services Due' with columns: Dept Due, Name, City, Due, and Scheduled. A context menu is open over the table, showing options: 'Report Options', 'Open Customer Card', and 'Open Service Card'. The table contains 36 rows of data.

Dept Due	Name	City	Due	Scheduled
hood	Demo Client 7078	Client City 78	5/1/2005	No
hood	Demo Client 7127	Client City 127	5/1/2005	No
hood	Demo Client 7158	Client City 158	5/1/2005	No
hood	Demo Client 6962	Client City 162	5/5/2005	No
hood	Demo Client 6586	Client City 186	5/11/2005	No
hood	Demo Client 6966	Client City 166	5/19/2005	No
hood	Demo Client 7169	Client City 169	5/1/2005	No
hood	Demo Client 6989	Client City 189	5/17/2005	No
hood	Demo Client 6411	Client City 11	5/4/2005	No
hood	Demo Client 7148	Client City 148	5/1/2005	Yes
hood	Demo Client 7159	Client City 159	5/1/2005	No
hood	Demo Client 6477	Client City 77	5/25/2005	No
hood	Demo Client 7128			
hood	Demo Client 7140			
hood	Demo Client 7145			
hood	Demo Client 7152			
hood	Demo Client 6979	Client City 179	5/4/2005	No
hood	Demo Client 7157	Client City 157	5/4/2005	No
hood	Demo Client 7162	Client City 162	5/4/2005	No
hood	Demo Client 7166	Client City 166	5/1/2005	No
hood	Demo Client 7167	Client City 167	5/1/2005	No
hood	Demo Client 6821	Client City 21	5/10/2005	No
hood	Demo Client 7172	Client City 172	5/1/2005	No
hood	Demo Client 7173	Client City 173	5/1/2005	No
hood	Demo Client 6837	Client City 37	5/12/2005	Yes
hood	Demo Client 7170	Client City 170	5/15/2005	No
hood	Demo Client 6491	Client City 91	5/16/2005	No

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.

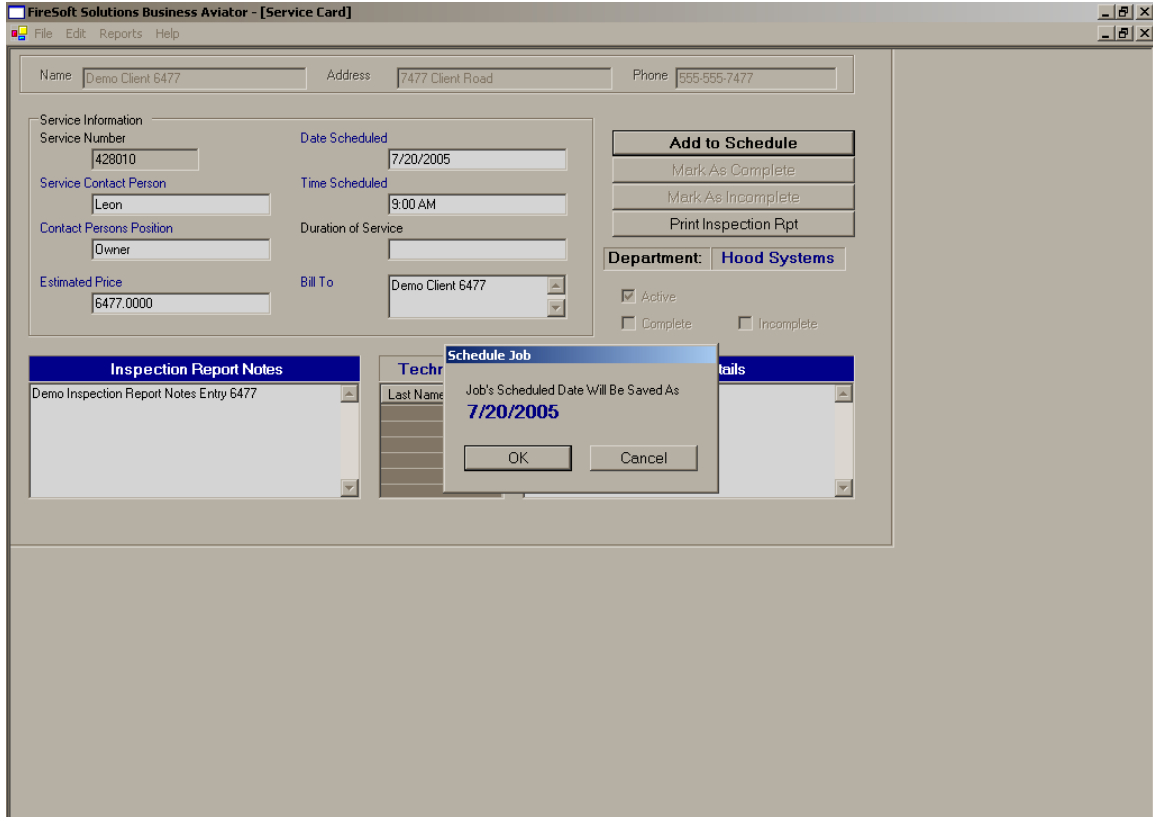
The screenshot shows the 'FireSoft Solutions Business Aviator - [Search Form]' application window. The 'Services Due' tab is active. On the left, there are search filters for Name, Address, City, Zip, Phone, Owner, Email, and Filter. Below these are checkboxes for 'List Services Due', 'Only List Active', 'List All Prior', 'All Prior Years', 'Requires PD', 'Due In Department' (with 'Hoods' selected), 'Requires Prior Call', and 'Has Checked Dpts'. The main area displays a table of services due with columns: Dept Due, Name, City, Due, and Scheduled. A context menu is open over the row for 'Demo Client 6477', showing options: 'Report Options', 'Open Customer Card', and 'Open Service Card'.

Dept Due	Name	City	Due	Scheduled
hood	Demo Client 7078	Client City 78	5/1/2005	No
hood	Demo Client 7127	Client City 127	5/1/2005	No
hood	Demo Client 7158	Client City 158	5/1/2005	No
hood	Demo Client 6962	Client City 162	5/5/2005	No
hood	Demo Client 6586	Client City 186	5/11/2005	No
hood	Demo Client 6966	Client City 166	5/19/2005	No
hood	Demo Client 7169	Client City 169	5/1/2005	No
hood	Demo Client 6989	Client City 189	5/17/2005	No
hood	Demo Client 6411	Client City 11	5/4/2005	No
hood	Demo Client 7148	Client City 148	5/1/2005	Yes
hood	Demo Client 7159	Client City 159	5/1/2005	No
hood	Demo Client 6477	Client City 77	5/25/2005	No
hood	Demo Client 7128	Client City 128	5/1/2005	No
hood	Demo Client 7140	Client City 140	5/1/2005	No
hood	Demo Client 7145	Client City 145	5/1/2005	No
hood	Demo Client 7152	Client City 152	5/1/2005	No
hood	Demo Client 6979	Client City 179	5/4/2005	No
hood	Demo Client 7157	Client City 157	5/4/2005	No
hood	Demo Client 7162	Client City 162	5/4/2005	No
hood	Demo Client 7166	Client City 166	5/1/2005	No
hood	Demo Client 7167	Client City 167	5/1/2005	No
hood	Demo Client 6821	Client City 21	5/10/2005	No
hood	Demo Client 7172	Client City 172	5/1/2005	No
hood	Demo Client 7173	Client City 173	5/1/2005	No
hood	Demo Client 6837	Client City 37	5/12/2005	Yes
hood	Demo Client 7170	Client City 170	5/15/2005	No
hood	Demo Client 6491	Client City 91	5/16/2005	No

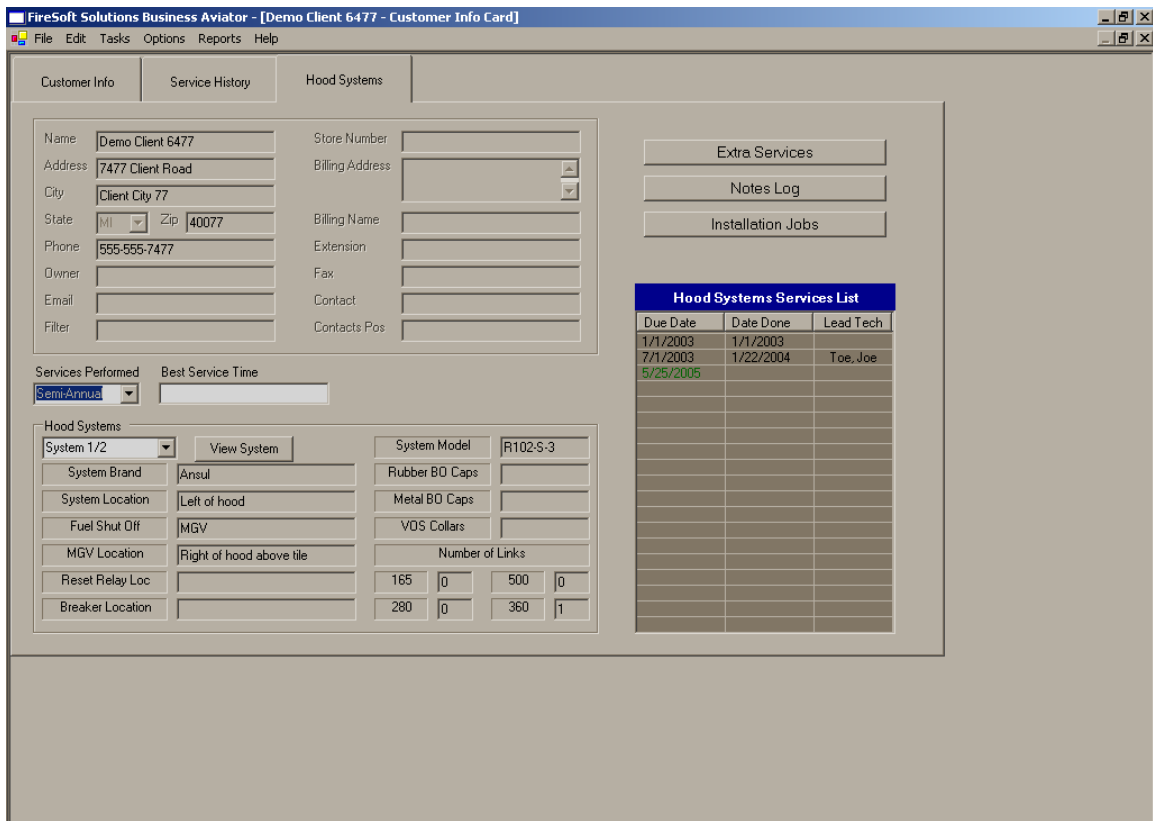
We are then presented with the service card for this customer's due-service. By default, the most recent completed service information is added to the new service card, to avoid having to re-enter data that is normally very similar each service.

The screenshot shows a software window titled "FireSoft Solutions Business Aviator - [Service Card]". The window contains a form for entering service information. At the top, there are three text boxes: "Name" with "Demo Client 6477", "Address" with "7477 Client Road", and "Phone" with "555-555-7477". Below these is a "Service Information" section with several fields: "Service Number" (428010), "Date Scheduled" (empty), "Service Contact Person" (Leon), "Time Scheduled" (empty), "Contact Persons Position" (Owner), "Duration of Service" (empty), "Estimated Price" (6477.0000), and "Bill To" (Demo Client 6477). To the right of these fields are four buttons: "Add to Schedule", "Mark As Complete", "Mark As Incomplete", and "Print Inspection Rpt". Below the buttons is a "Department" dropdown menu set to "Hood Systems" and three checkboxes: "Active" (checked), "Complete" (unchecked), and "Incomplete" (unchecked). At the bottom of the form, there are three panels: "Inspection Report Notes" containing "Demo Inspection Report Notes Entry 6477", "Technicians" with a "Last Name" header and several empty rows, and "Service Details" which is currently empty.

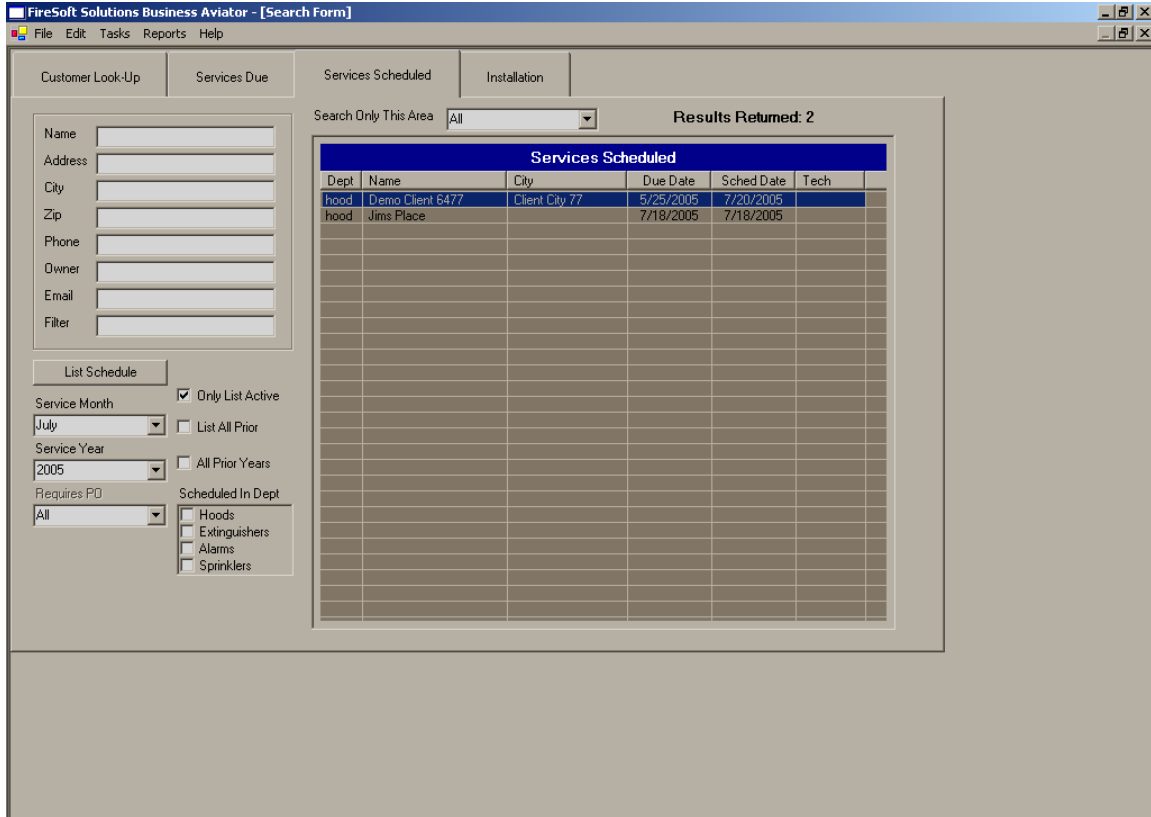
Once we fill in the Date Scheduled and Time Scheduled, the ‘Add to Schedule’ button will become available. Upon clicking ‘Add to Schedule’ you are prompted with a confirmation to add the service to the schedule.



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

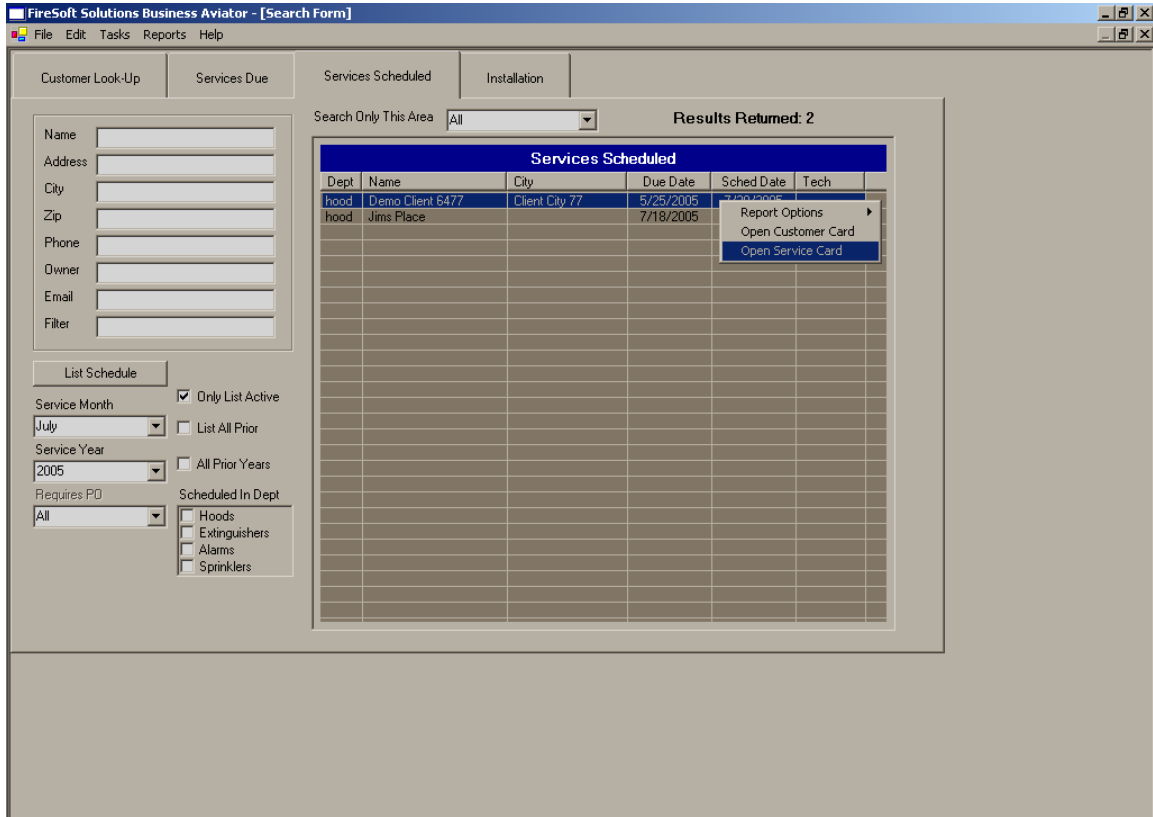


Returning to the search card, we now navigate to the 'Services Scheduled' tab. This has similar criteria to the Services Due tab, but only lists services that are currently scheduled.



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

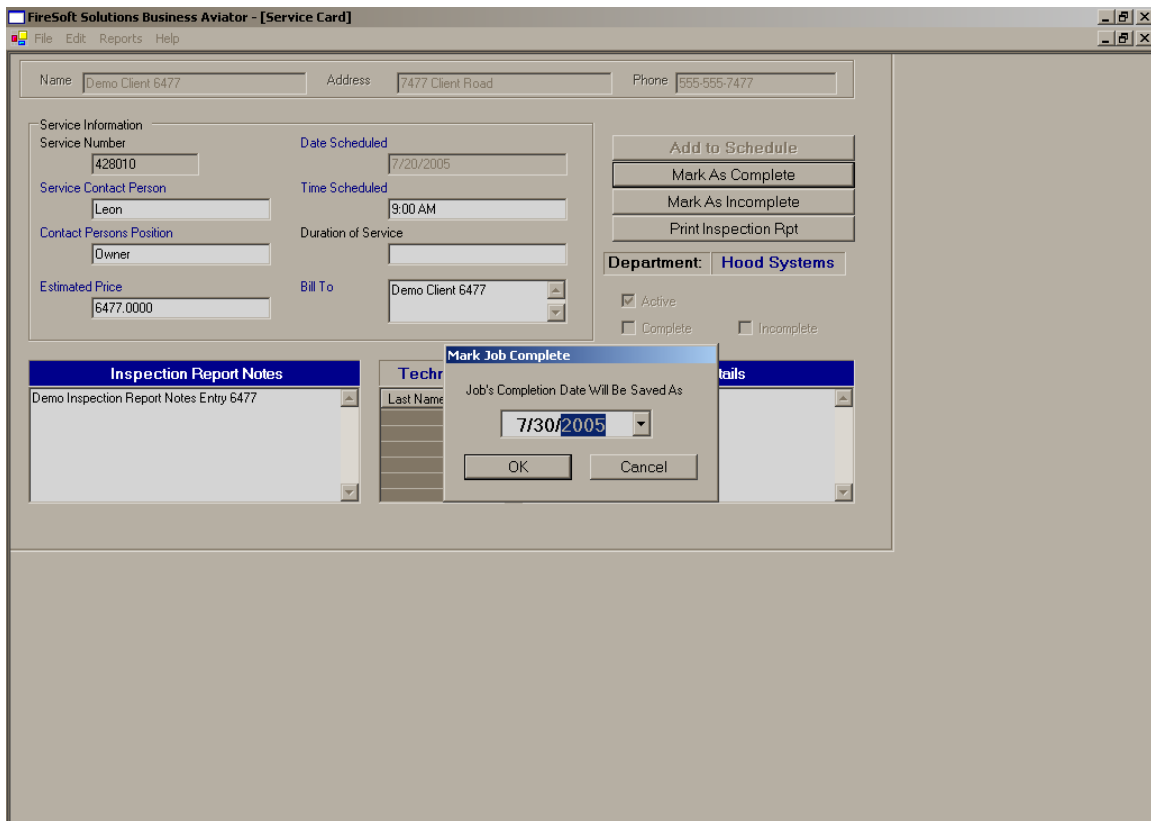
We can then right click and choose to report on the services due that are in the list, or open the service card for the customer to make changes, or mark the service complete. We will choose to open the service card for the customer we just scheduled.



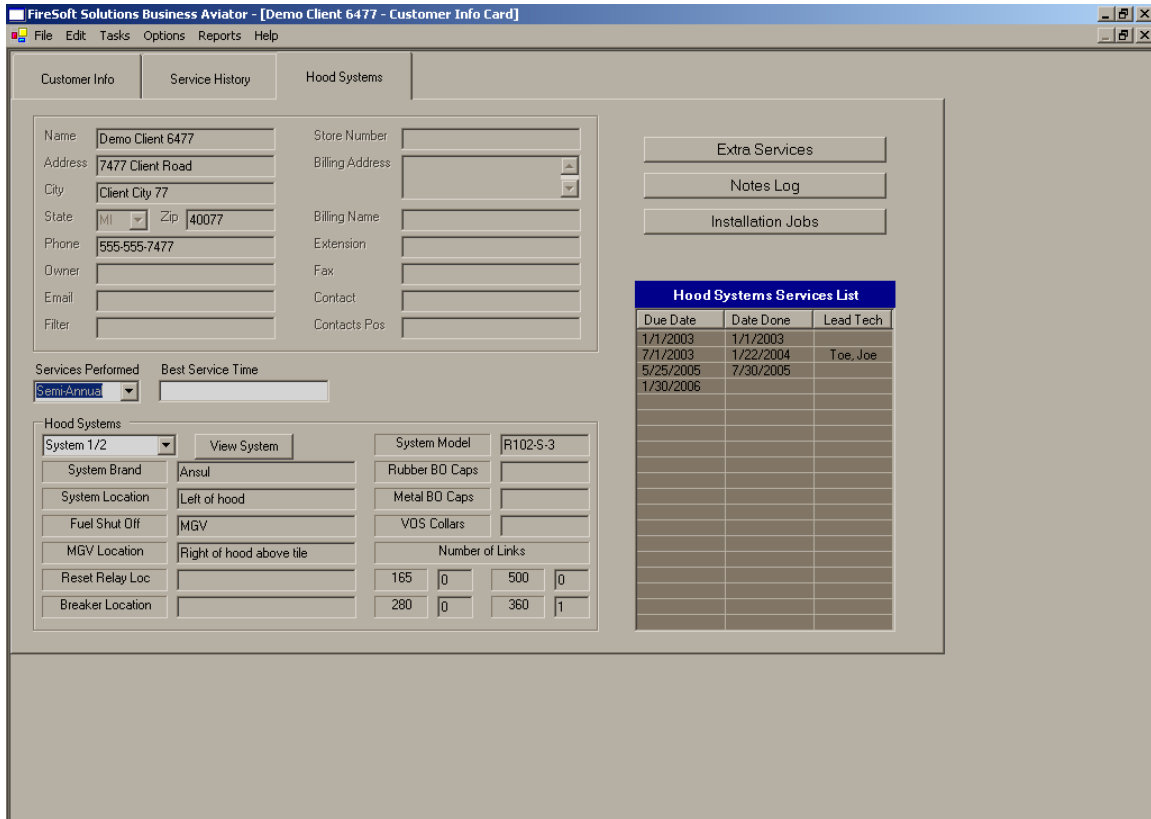
Once a service has been scheduled, its 'Date Scheduled' cannot be changed, but the time can be changed at any time. At this point, a scheduled service has to either be marked 'Complete' or 'Incomplete'.

The screenshot shows a software window titled "FireSoft Solutions Business Aviator - [Service Card]". The window contains a form for managing service cards. At the top, there are input fields for Name (Demo Client 6477), Address (7477 Client Road), and Phone (555-555-7477). Below this is a "Service Information" section with fields for Service Number (428010), Date Scheduled (7/20/2005), Service Contact Person (Leon), Time Scheduled (9:00 AM), Contact Persons Position (Owner), Duration of Service, Estimated Price (6477.0000), and Bill To (Demo Client 6477). To the right of these fields are buttons for "Add to Schedule", "Mark As Complete", "Mark As Incomplete", and "Print Inspection Rpt". Below the buttons is a "Department" dropdown menu set to "Hood Systems" and checkboxes for "Active" (checked), "Complete", and "Incomplete". At the bottom of the form, there are three panels: "Inspection Report Notes" (containing "Demo Inspection Report Notes Entry 6477"), "Technicians" (with a "Last Name" header and empty rows), and "Service Details" (empty).

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

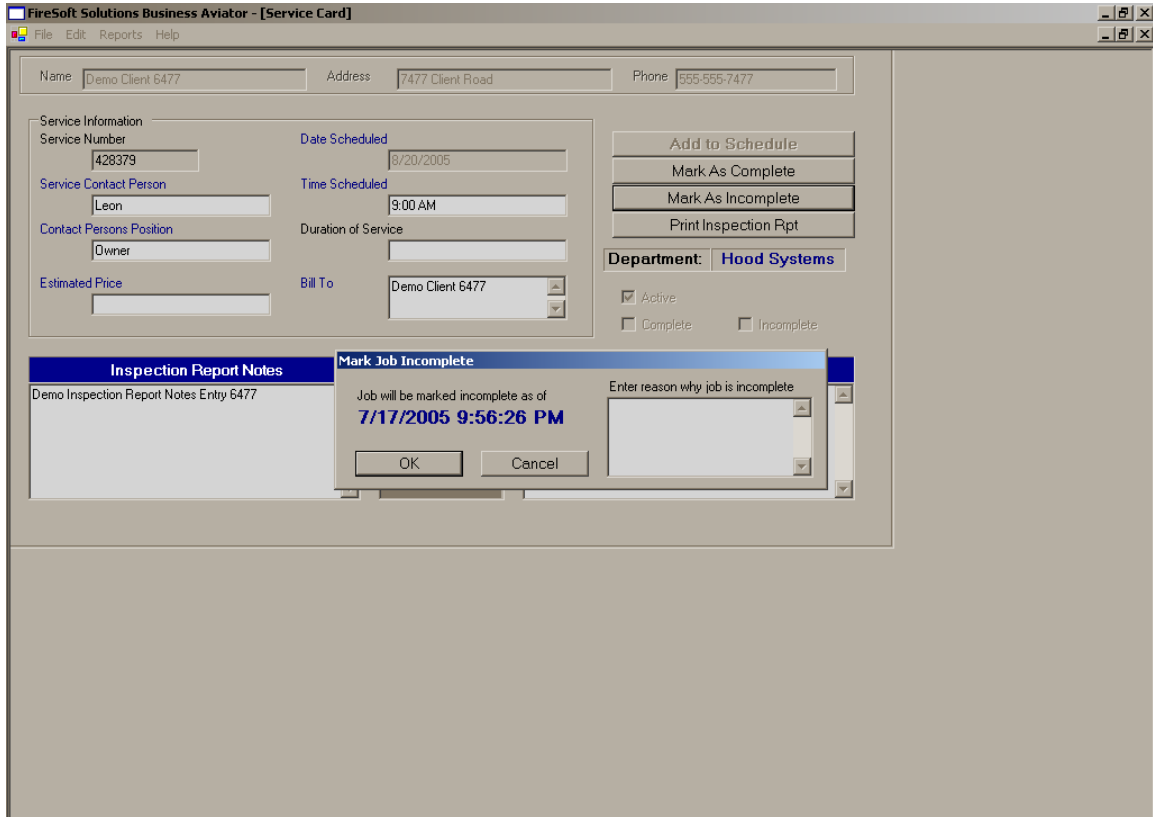


Returning to the customer card, we notice that the service we just completed has our new completion date, and a new service due date has been created based on our selection in the 'Service Frequency' dropdown.

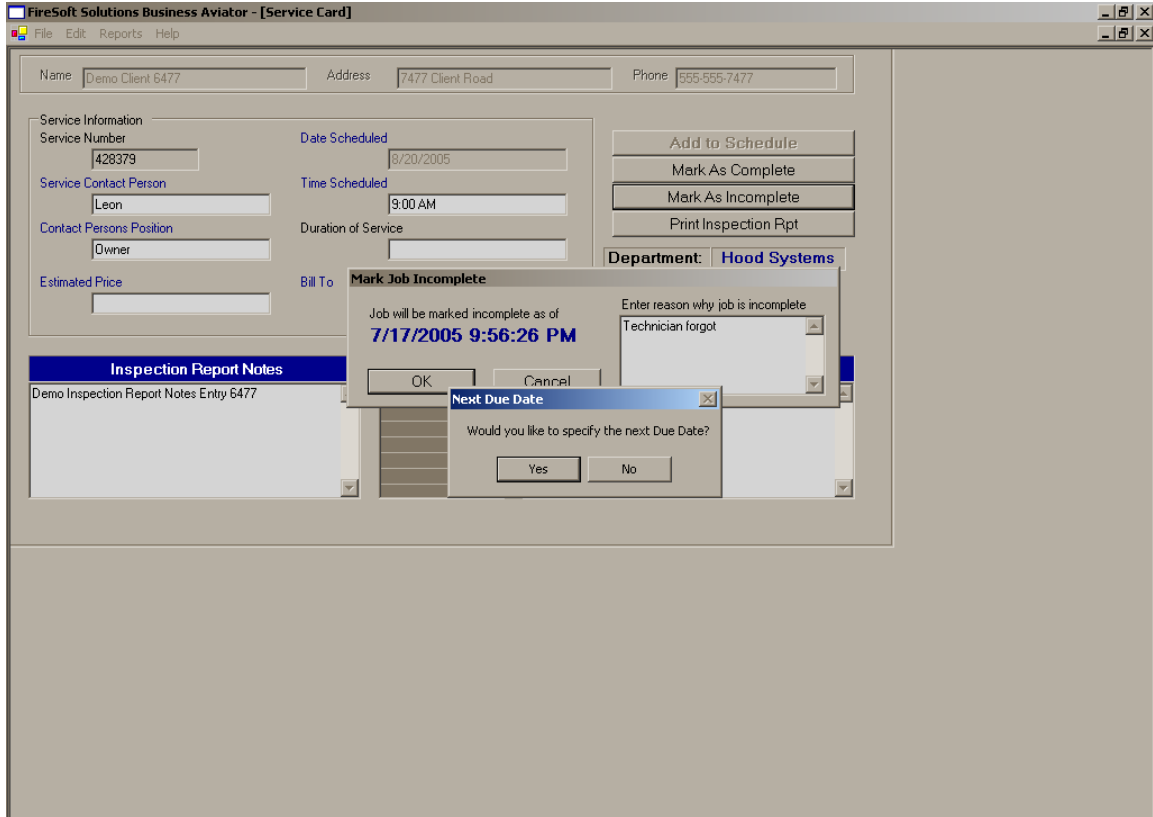


If any service due date is incorrect, by right clicking on the service we can choose 'Override Due Date' to correct the due date.

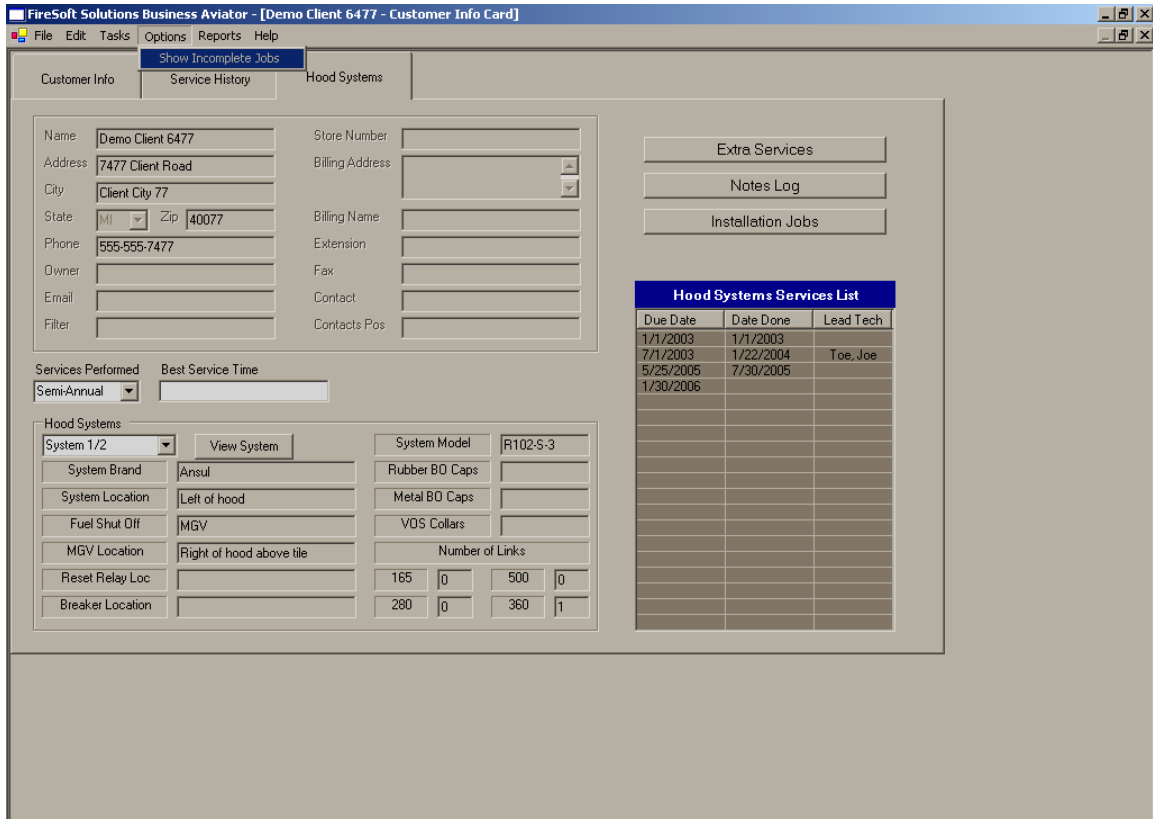
If rather than completing the service on the date it was scheduled, it was not completed for some reason; we would choose 'Mark As Incomplete' on the service card. This will prompt the user to enter a reason why the job was not completed.



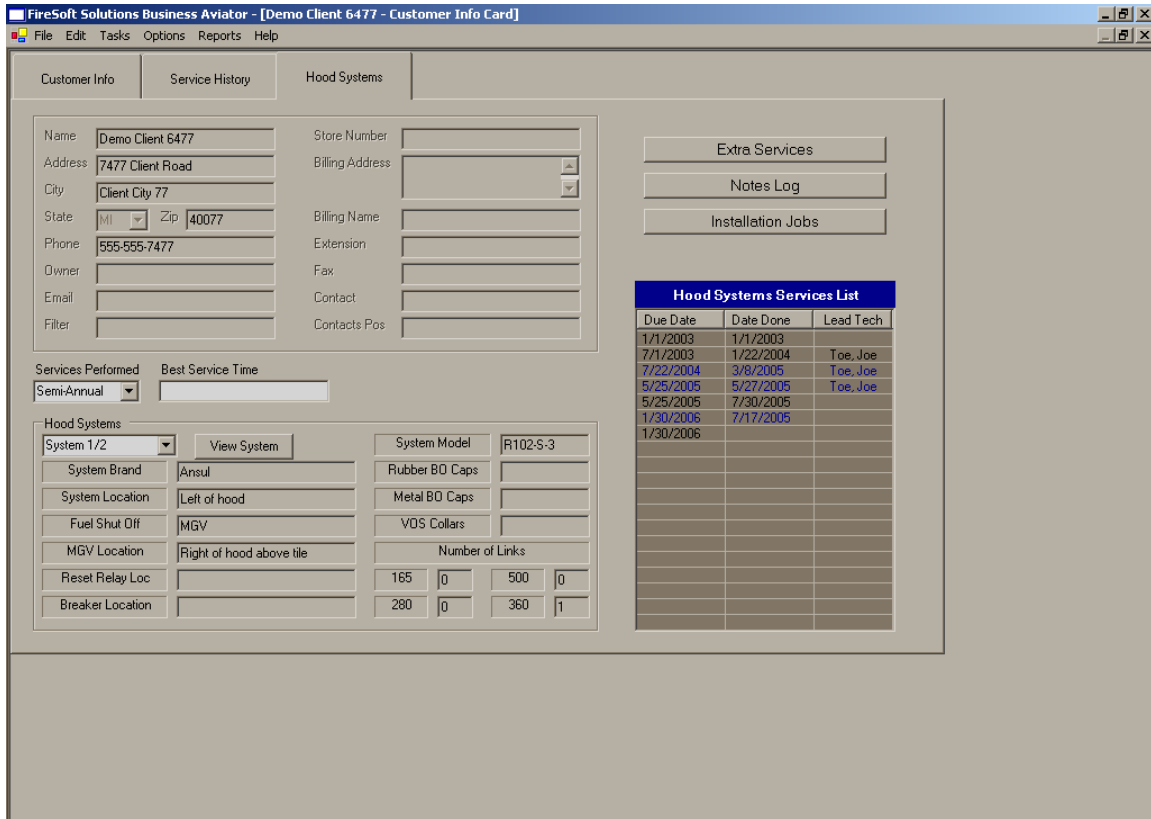
After entering a reason and choosing OK, the user will be given the option to specifically set the next due date or not. If 'No' is chosen, the due date defaults back to the previous service due date.



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.



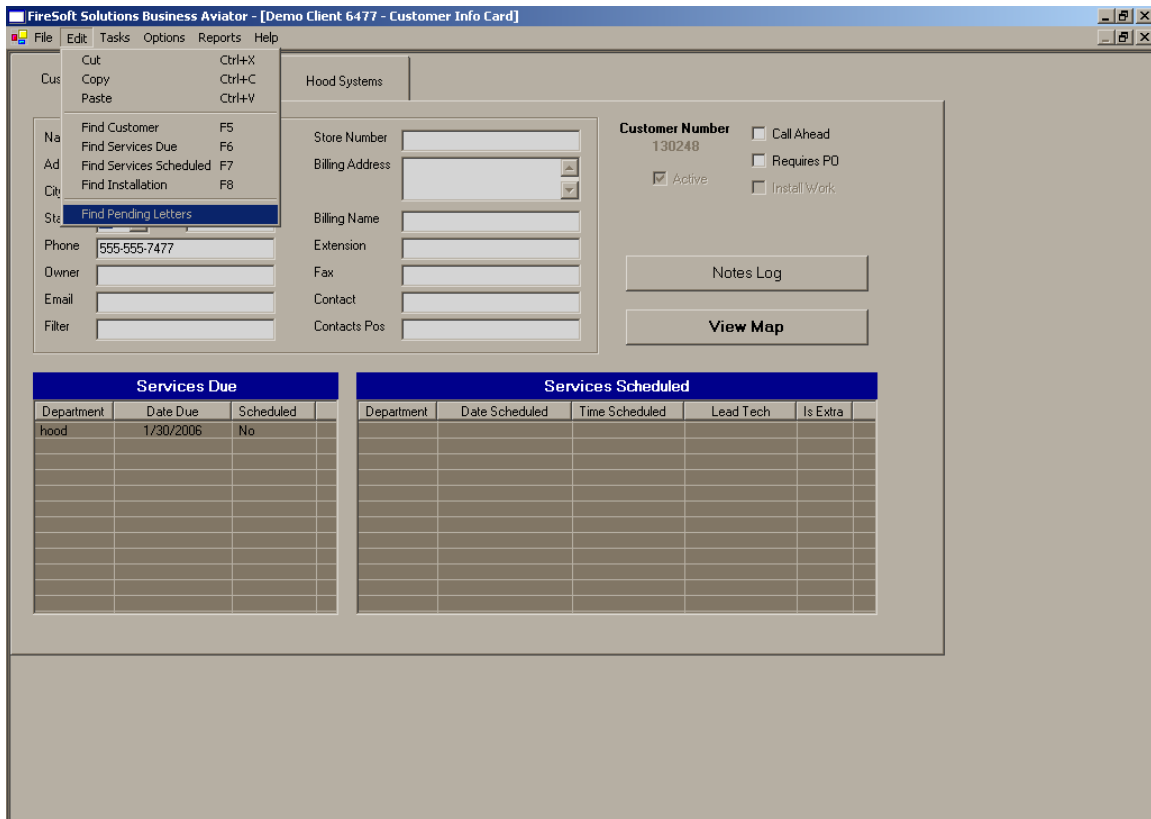
You can see our recent job marked incomplete defaulted back to its original due date because we chose not to specify a due date when marking it incomplete.

# Miscellaneous Management Tools

## Letter List:

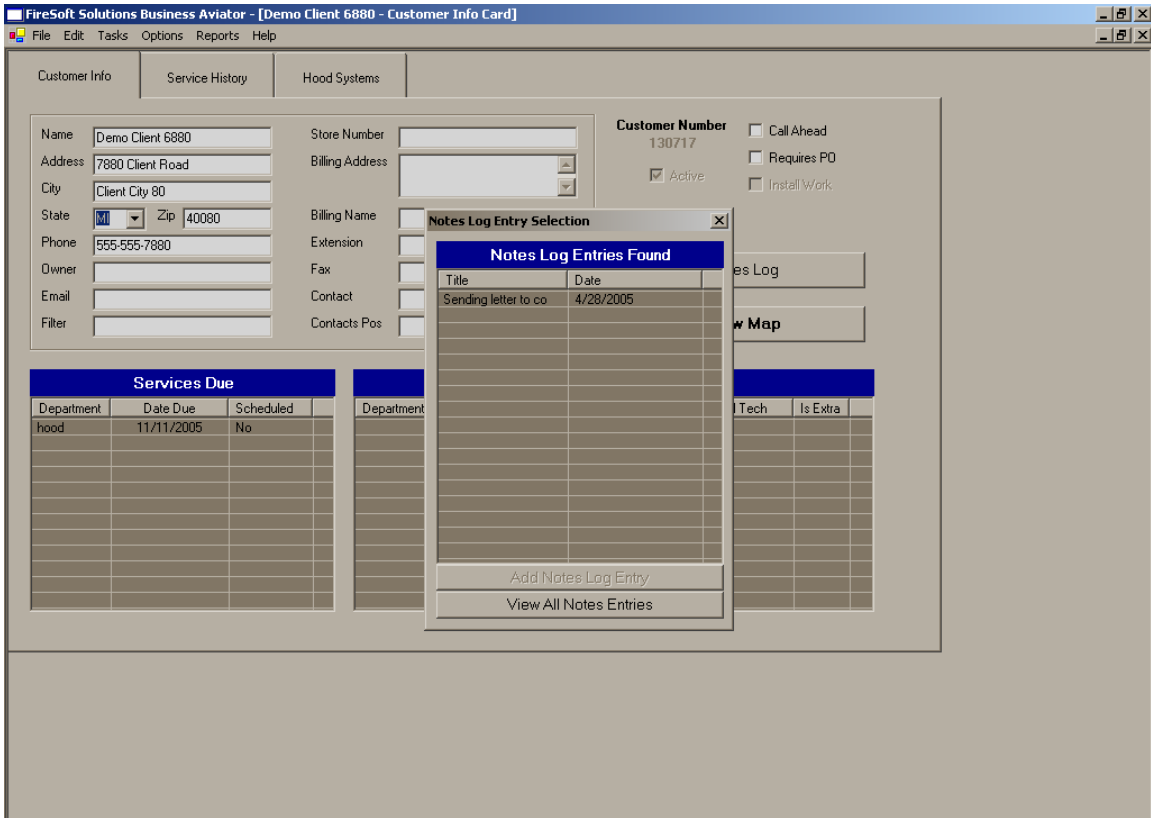
There are a few other general management tools within the application, and any further management tools can be added per your preference to your customized version of the application.

The picture shown below shows us selecting ‘Find Pending Letters’

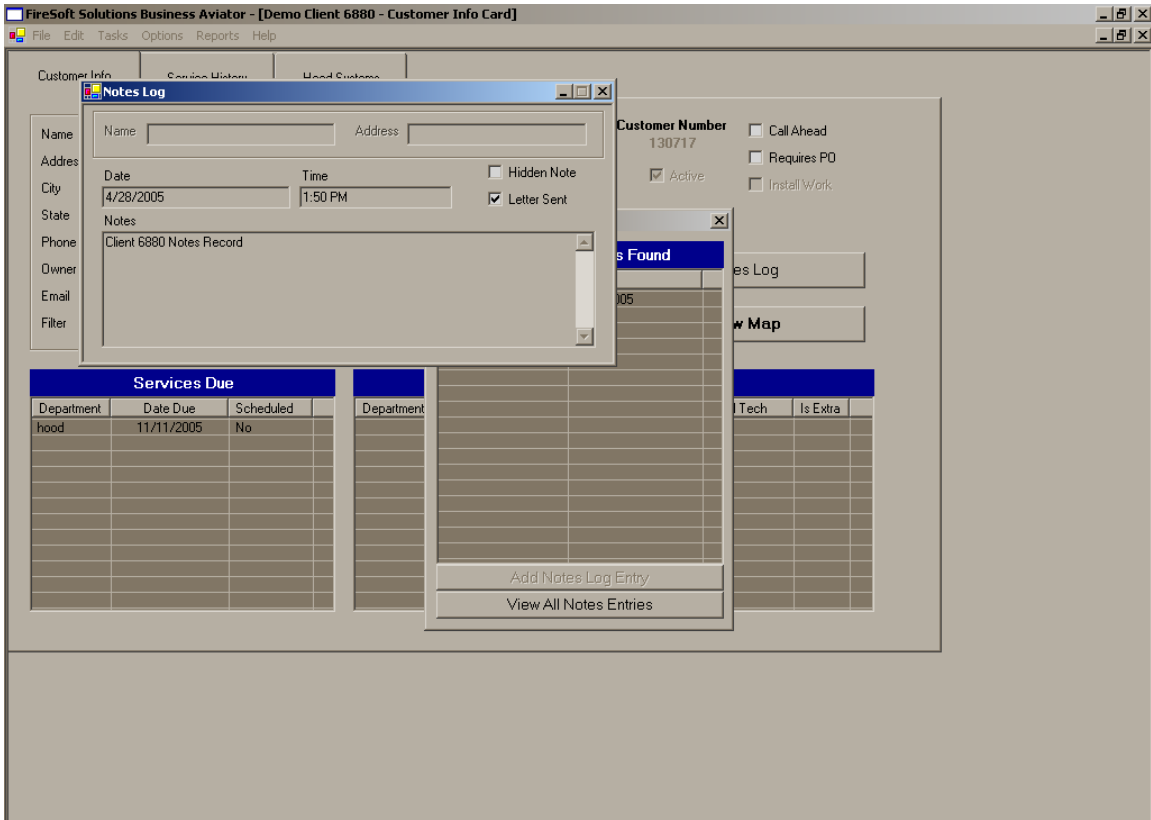




By opening the record from the list, the customer card is opened and we see in the notes list that a record exists regarding this letter.



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.

The screenshot shows the 'FireSoft Solutions Business Aviator - [Demo Client 6880 - Customer Info Card]' window. The 'Tasks' menu is open, and the 'Inactivate Department' option is selected under the 'Hood Systems' tab. The interface includes fields for customer information, a 'Hood Systems Services List' table, and various system configuration options.

**Customer Info Card Fields:**

- Name: [Empty]
- Address: [Empty]
- City: [Empty]
- State: [Empty]
- Phone: 555-555-7880
- Owner: [Empty]
- Email: [Empty]
- Filter: [Empty]
- Billing Address: [Empty]
- Billing Name: [Empty]
- Extension: [Empty]
- Fax: [Empty]
- Contact: [Empty]
- Contacts Pos: [Empty]

**Services Performed:** Semi-Annual

**Hood Systems:** System 1/1, System Model: R 102 S-3

**System Configuration:**

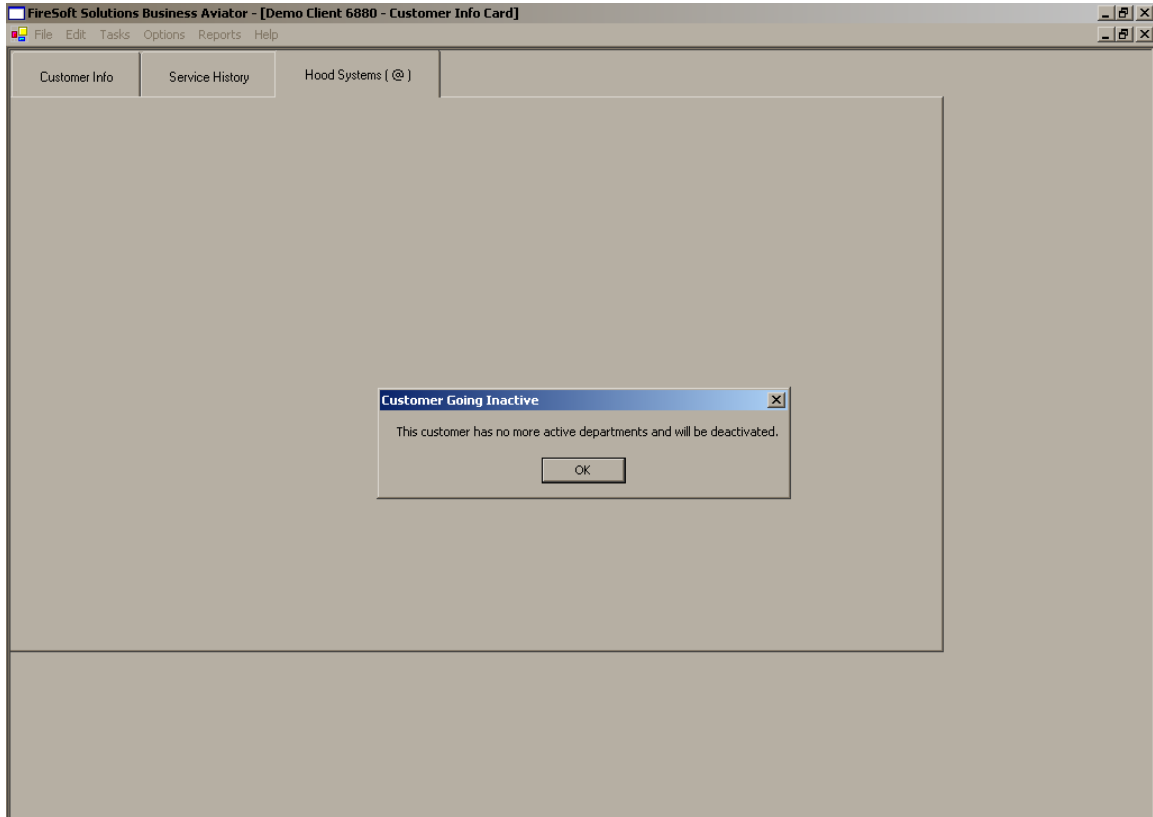
- System Brand: Ansul
- System Location: Right end of hood
- Fuel Shut Off: MGV
- MGV Location: Left of system location
- Reset Relay Loc: [Empty]
- Breaker Location: [Empty]
- Rubber BO Caps: [Empty]
- Metal BO Caps: [Empty]
- VDS Collars: [Empty]
- Number of Links: 165 (0), 500 (1), 280 (0), 360 (2)

**Hood Systems Services List:**

Due Date	Date Done	Lead Tech
2/1/2004	2/1/2004	
8/1/2004	4/28/2005	
5/10/2005	5/11/2005	Toe, Joe
11/11/2005		

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.







## 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](mailto:talktous@firesoftsolutions.com).