EQ Professional
Workflow Module
User Guide

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What is Workflow?

Workflow takes a task oriented approach to ensure all your jobs are complete. For each quote and/or sales order EQ can apply your tasks automatically and assign them to each user who will be responsible for them.
When you begin with Workflow you will enter every task that you may need and then setup the conditions of each task. For example tasks for fitting special products only need to appear if the relevant products are on the sales order.

Tasks can be dependent on:

1. Individual products
2. Types and categories of products
3. Room types
4. Order Types (Quotes, Full Orders, Add-Ons, Remedial Orders)
5. Customer status
6. Order status
7. Milestones already completed
8. Tasks already completed
9. Customer Types

Tasks can be viewed in 1 of 3 ways:

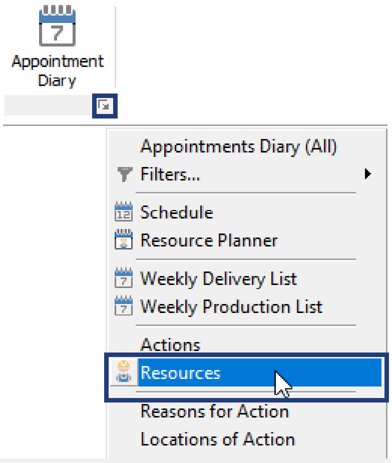
- My Tasks
- Projects > Workflow window (shows all tasks not completed)
- Order Task List (shows all tasks relevant to a specific quote/sales order)

Tasks can then be completed in 1 of 5 ways:

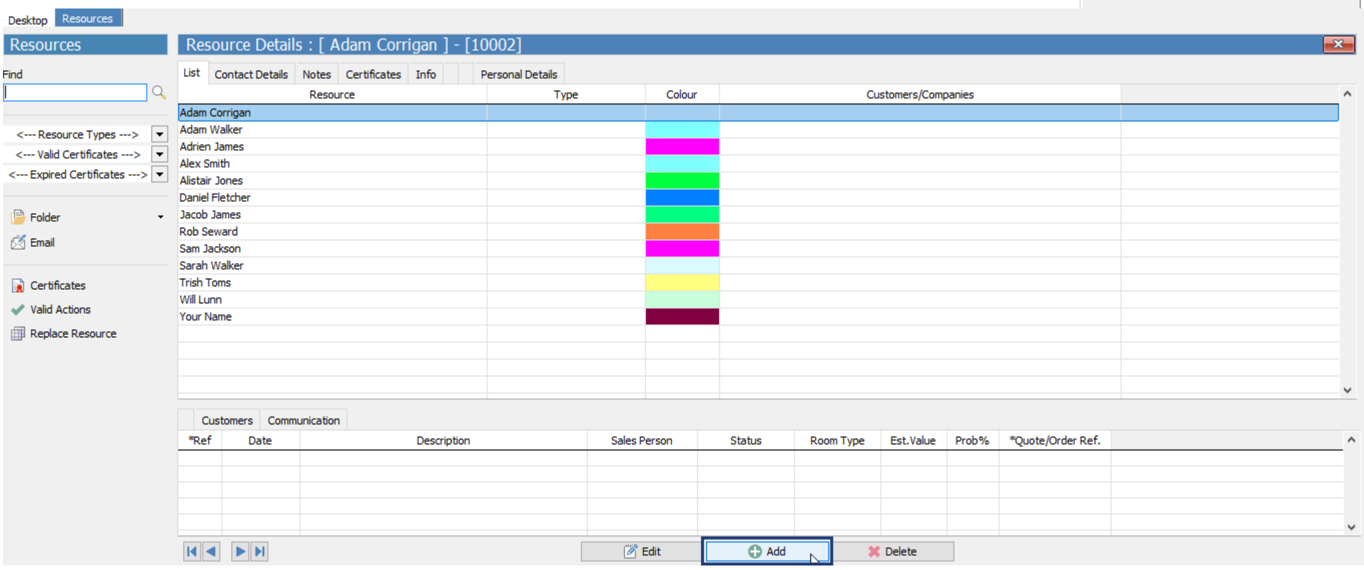
1. Ticking them off manually
2. Sending a templated email
3. Sending a templated text
4. Sending a templated letter
5. Marking an entire quotation or sales order’s tasks as completed

Adding Resources

A resource is a person who works for you - these could be Fitters, Sales People or Lead-Takers. To record them in EQ, click the drop down arrow next to Appointment Diary from your Main Toolbar & select **Resources**.



To add a New Resource, click 



Fill in your resource's contact information.

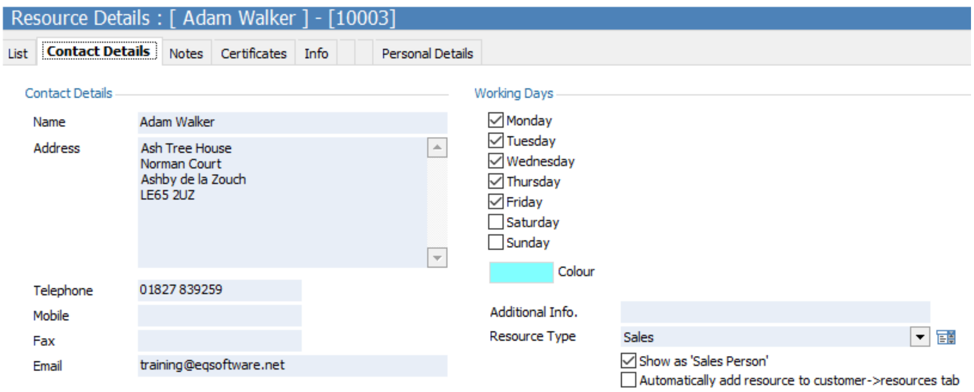
To the right, select their working days (for Resource Planner and Workflow Order Task List) and choose a colour for all actions relevant to this resource to appear on the appointments diary.

Configure resource types by using the pop-up contents box, then select the relevant option from the list.

If you wish to see your resource listed as a salesperson on the customer screen, tick the box **Show as 'Sales Person'**.

Click **Update** to save your changes.

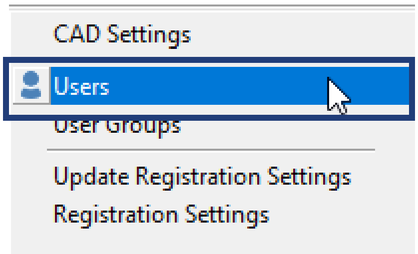
Repeat as necessary for all of your Resources.



Configuring User Settings

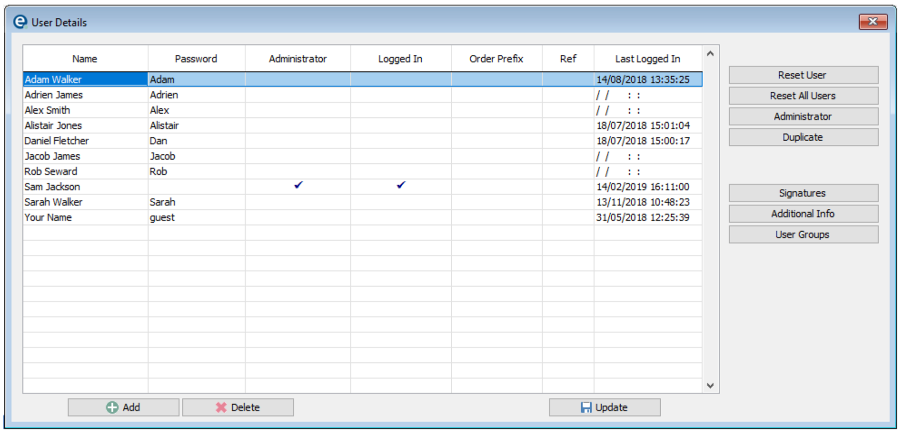
Anybody that uses EQ will need to be set up with a **Username** and **Password**, and will need to be given access rights in order to allow all access or limit the functionality available to users.

Part A – Configure Users

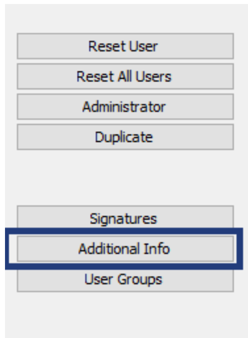


Click the System Config dropdown from the main menu bar and select **Users**.

This opens a screen that allows you to add users to your system.



By default, there are two users, the **Administrator** and a blank user. For first time set-up, select the **Administrator** user and change it to your own name. Give yourself a password in the next box across. You will need to enter this the next time you log into EQ. In the blank user, type the name of another person that will be using EQ, and give them a DIFFERENT password to your own (*note that passwords must be unique for each user)*. In the **Order Prefix** column, you can put the user's initials if you wish. This will then prefix all quotes produced by that particular user with these letters instead of your **Default Order Prefixes**. You can add additional users by clicking **Add** at the bottom and entering the relevant information. If you are the only user of your system, highlight the blank line and click **Delete**.

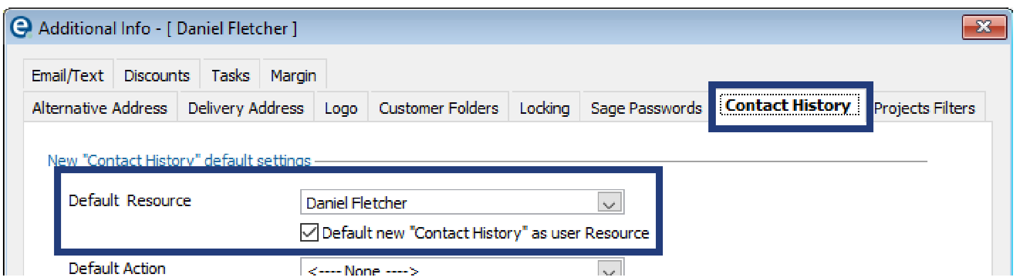


You may then want to configure additional settings for each user. This can be done by selecting the user, and clicking **Additional Info** on the right hand side. Here, you can set user-specific addresses, delivery addresses, email settings (so users can email out of their own accounts instead of using the default settings), logo, minimum margin etc.

Click **Update** to save and close.

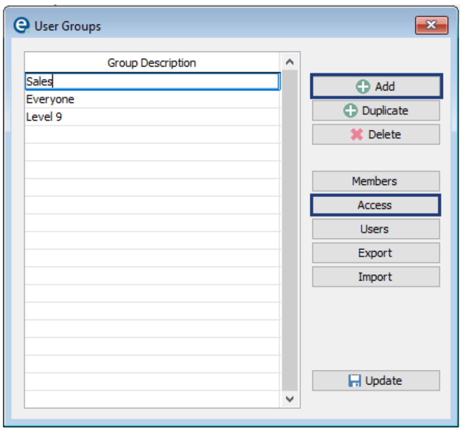
Hints and Tips

Link users to resources by clicking Additional Info > Contact History. Select the relevant Resource and tick the box below.



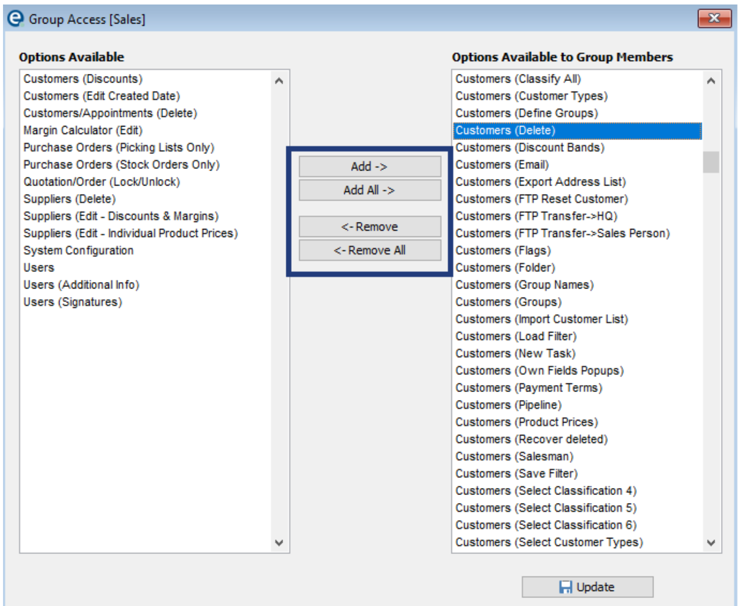
Part B – Add Users to Access Groups

From the main menu bar, click the **System Config dropdown arrow** and **User Groups**. These are your access groups, allowing you to restrict users' functionality within the software. By default, there are two groups: **Everyone** and **Level 9**.



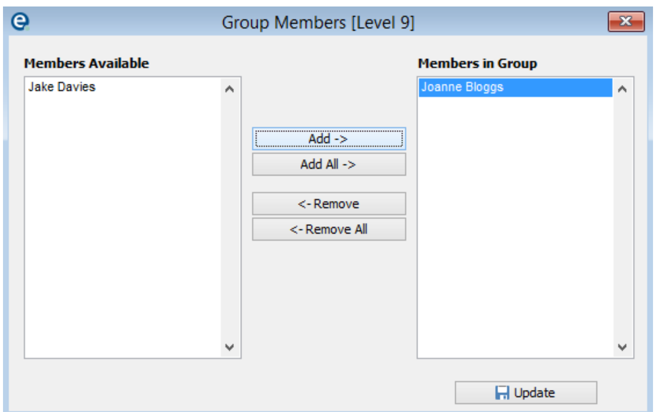
You can add additional access groups by clicking **Add** on the right hand side. Give your group a name and then click **Access** on the right.

This gives you a list of functionalities – those which members DO NOT have access to, on the left, and those which they DO, on the right. To enable a functionality for group members, highlight it on the left and click **Add**. To remove a functionality, highlight it on the right and click **Remove**.



Click **Update** to save and close.

Back in the **User Groups** screen, select a group and click **Members** on the right (you won't be able to do this if you've got the **Everyone** group selected as this always contains all users). Select a user you wish to add into this group on the left and click **Add**, to add them into this access group. Click **Update** to save and close.



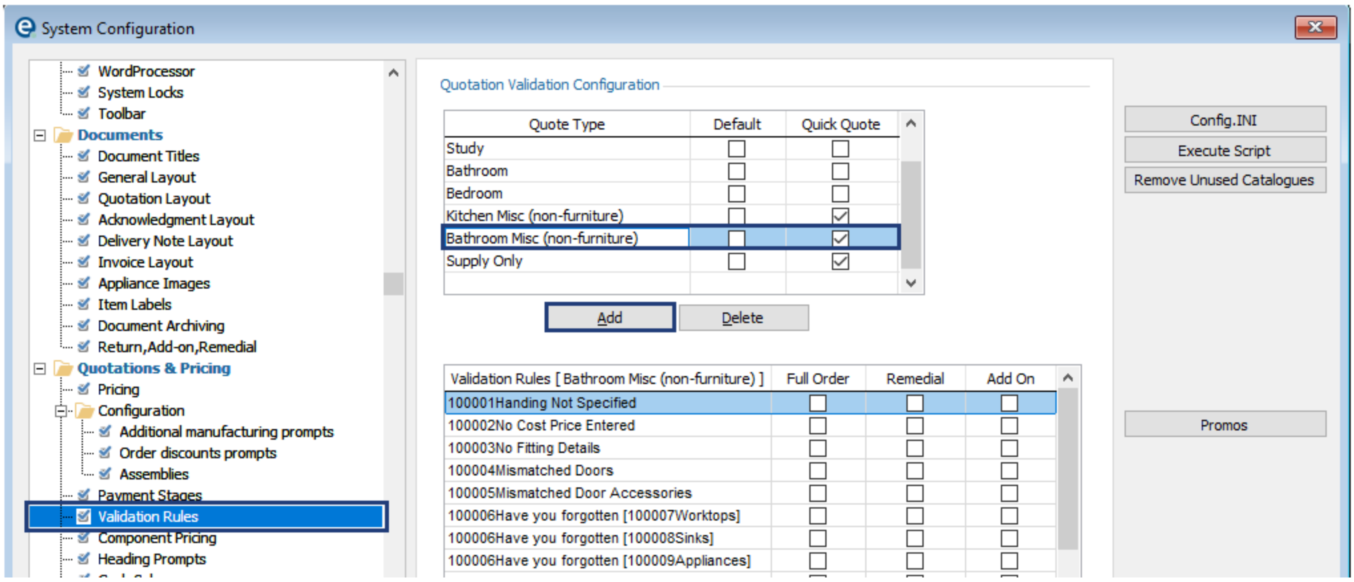
Remember to click **Update** in the **User Groups** screen to save your settings.

Hints and Tips

Restrict the Everyone group to a basic level of access settings. All users will have at least this level of access.

Quotation Types

Quotation types can be useful for setting different validation rules and assigning different Workflow tasks.

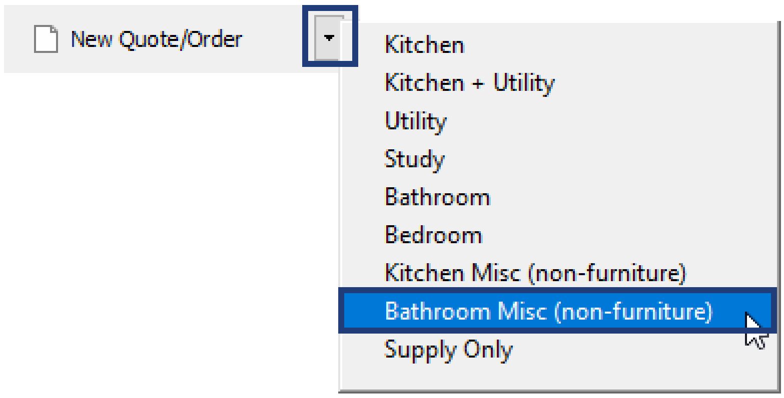


From System Config, locate Quotations & Pricing and select Validation Rules. Select a quotation type in the right and set the relevant validations rules to be applied at the bottom.

Add additional quote types by clicking add and entering a description. Tick Quick Quote to omit the furniture manufacturer headings.

Click update to save and close.

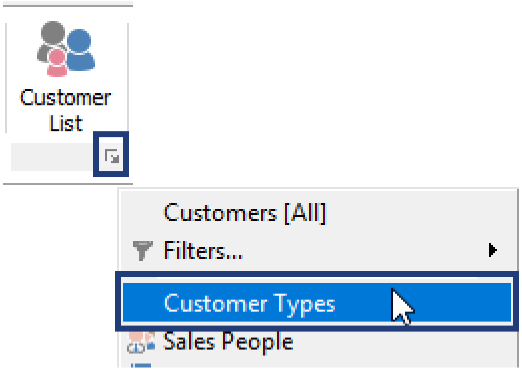
You can select which quote type to utilise when you create a new quote from the customer screen.



Hints and Tips

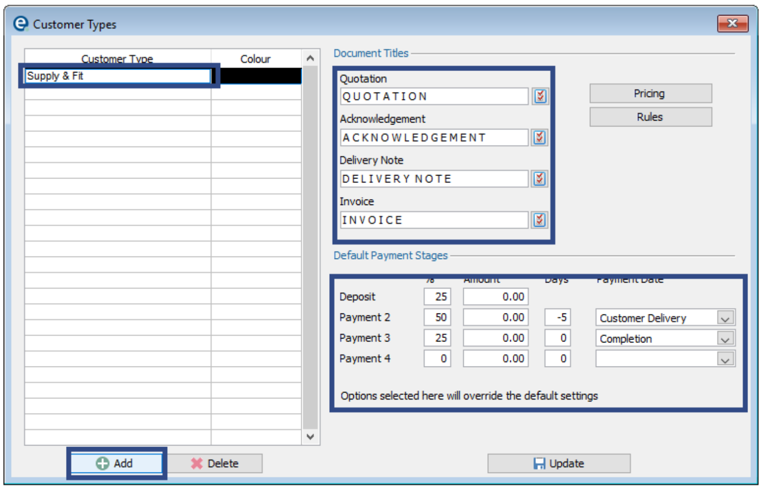
- Turn quotation headers on for quick quotes by clicking System Config > Heading Prompts and ticking Show prompts on Quick Quotes.
- Turn on classifications to select the sales person for each quotation in System Config > Quotations and Pricing > Configuration and ticking Show classifications when saving a new quotation.

Creating Customer Types



Customer Types allows for different default payment structures, rules, basic document layouts and different Workflow tasks for each type of customer

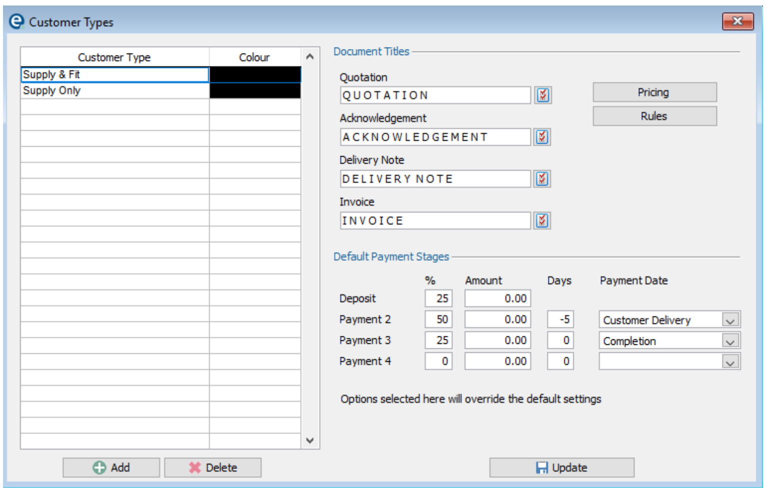
Click the drop down arrow below Customers and select Customer Types.



Click Add at the bottom to add a type of customer in to the list.

Give your customer type a name (in this example we've used Supply & Fit), and then configure the settings on the right.

Amend if necessary the names of the documents for this type of customer. Click the pop up boxes to the right for additional options, such as to set default notes at the bottom of the documents for this type of customer. Enter the default payment stages at the bottom.



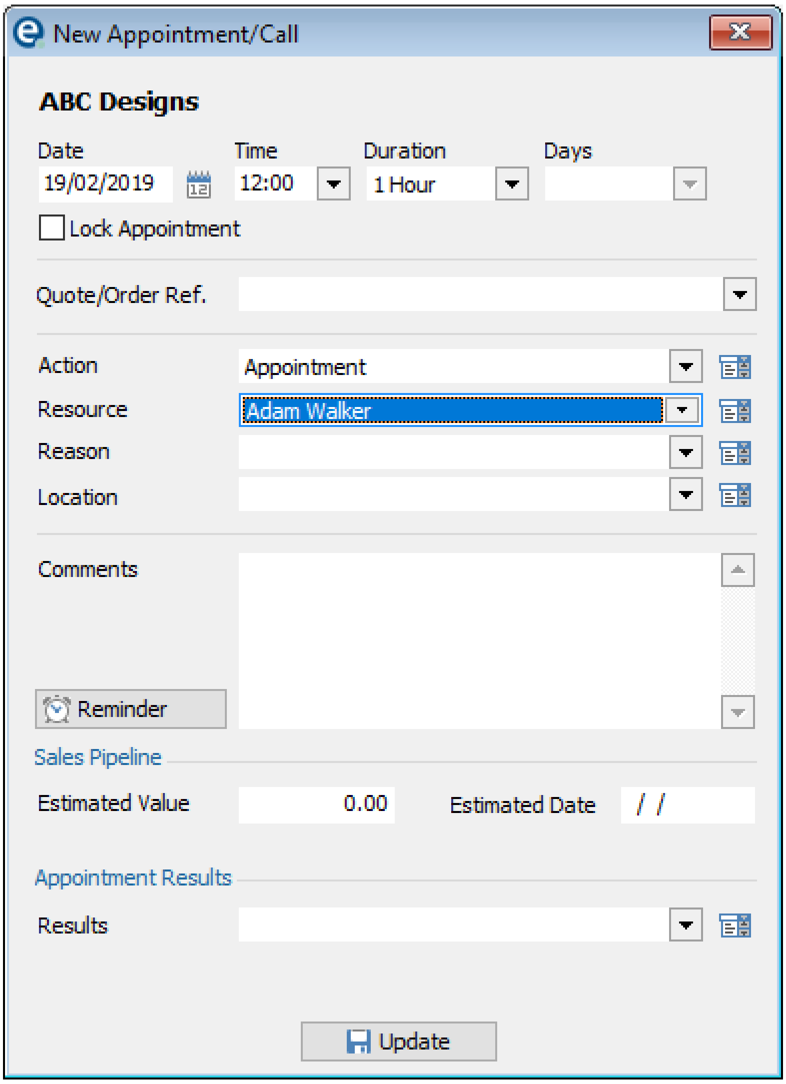
Click Update to save you changes.

Creating Communication Events

Communication entries can be created from a number of places:

- **Customer Screen** – By selecting a customer record and clicking the **New Communication button** on the left.
- **Projects>Contact History** – By right clicking on a **Ref** and selecting **New** (note that the Ref you select must already be allocated to the customer you want to record the new communication entry for).
- **Projects>Quotations** – Right click on a **Customer Name** and select **New** (and any other projects screens where you can right click on a customer name).

Whichever way you choose, the following New Appointment form will opened.



Ensure the date and time is correct, and select a duration for the contact.

If your contact is in relation to a quote or order that you have already done for the customer, select this from the drop down.

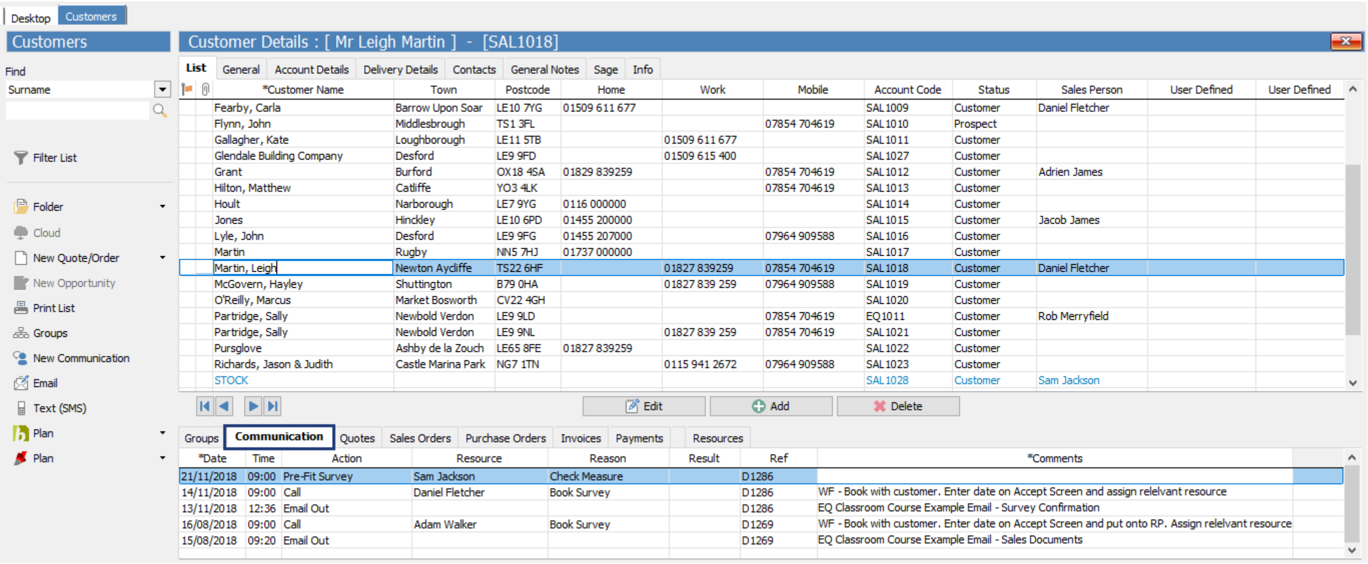
Choose your **Action** – what is happening.
Choose the **Resource** – who is doing it
Choose the **Reason** – why it is happening
Choose the **Location** – where it is happening

In the **Comments** box, type any additional information that is relevant, such as what exactly was discussed if you are logging a telephone conversation. A useful feature here is that you can right click in this box to give you a date and time stamp.

Select a **Result** for the contact, and a **Result Reason** if necessary, and click **Update** to save and close.

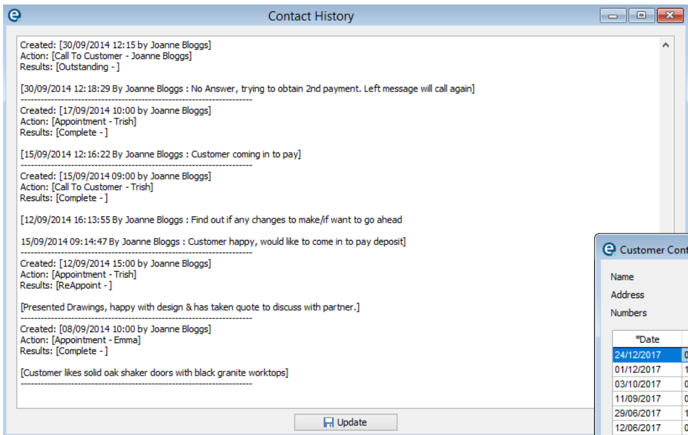
Viewing Communication Entries

Any communication you have created can be viewed from a number of different locations within EQ – the first (and probably easiest) is the customer screen. From the customer database, select a **Customer** and click the **Communication Tab** at the bottom of the window.

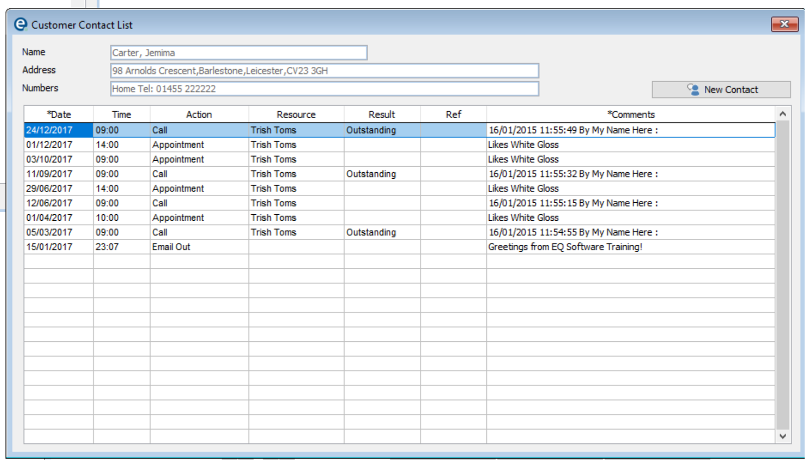


This will allow you to view the complete list of communication your company has had with that customer.

Right click on the **Date** of an entry to open and make any amendments to it, print it (useful for on-site appointments), open the quote/order to which it relates, or delete it completely.



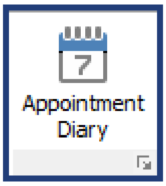
Right click on the **Communication Tab** to pop-out all of the contact entries for easy viewing of all the contact that has occurred with the customer



Double click on the **Communication Tab** to pop-out all of the contact entries for a different view of them. Right click in a **Comments Field** to open it and see more detail.

Appointment Diary

The appointments diary within EQ allows you to view and add actions for your resources (usually Sales People) that are relevant to your customers, such as appointments and surveys. Anything you add onto the appointments diary will appear as an entry in the relevant customer's communication tab on the Customer Screen.



To open the diary, click the **Appointment Diary** icon on the main toolbar.

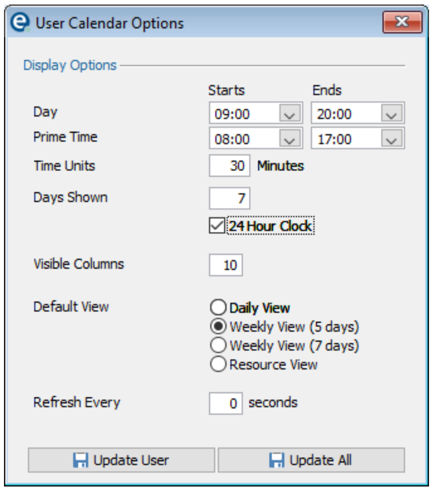
Diary Toolbar

The toolbar buttons at the top of the diary allow you to navigate through the different dates and diary views, add new diary appointments, open the customer folder, customise the layout of the screen and refresh the screen.

Customising the Diary Screen

Here you can set the working times for a standard day, time units, number of days shown, clock type, default view and screen refresh time.

You can update your own user, or update all users with these customisation settings.

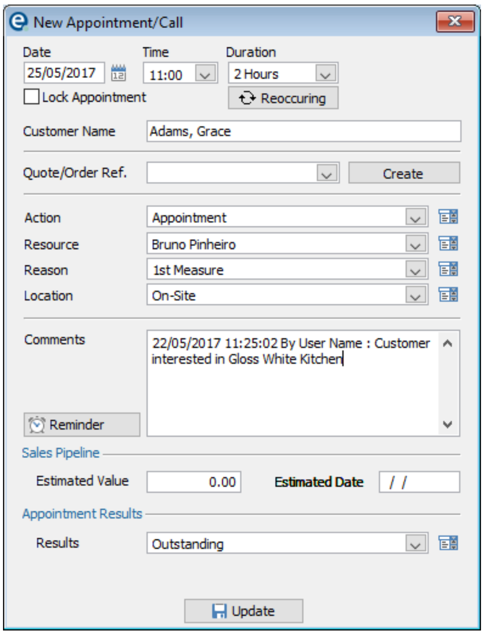


Adding an Appointment (Action) to the Diary

Note: You must first have a customer record in order to record any action (eg – appointments) anywhere in EQ.

To add an appointment to the diary you can either click on the **New** button or double click on the appointment slot you require on the diary.

Then complete the **New Appointment/Call** window.



Complete the **Date**, **Time** and expected **Duration**.

Type in the **Customer's Surname** or **Company name** and press the **Enter Key** on your keyboard. This will list all customer records that match the name. Use the up and down arrow keys to highlight the customer you require and press the **Enter Key** again to select.

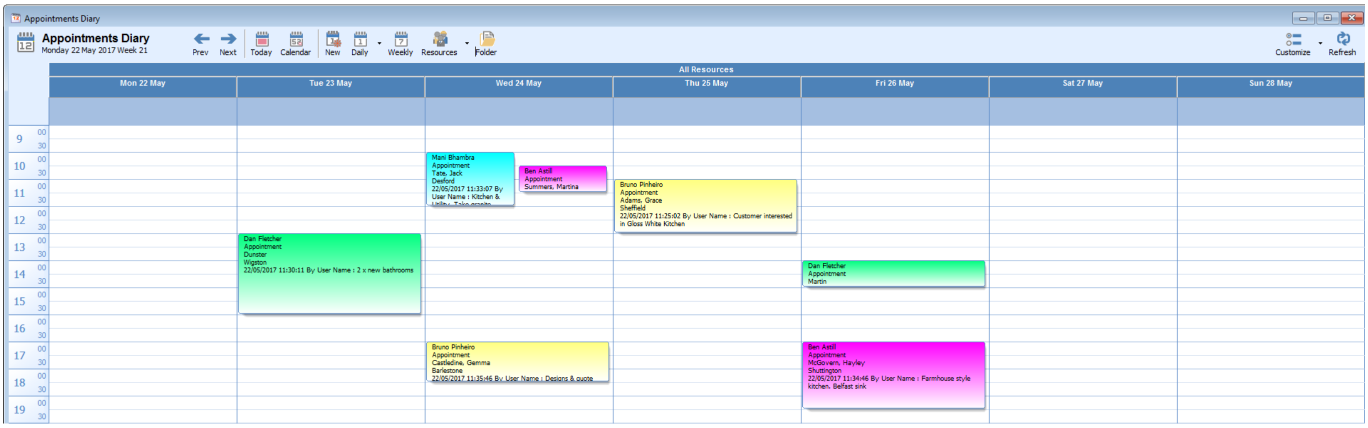
Select the **Action, Resource, Reason, Location*** and enter any relevant comments. Right click the comments box to enter a time and date stamp.

Select the relevant **Results** for your action and click update. You should now be able to view your appointment in the diary.

*These popup options can be customised to suit your own business requirements.

Editing Appointments (Actions) on the Appointment Diary

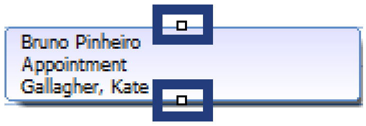
Once an appointment has been created you can view them on the diary as below. The colours you see are the colours that have been assigned to the resource when configuring them.



To edit an appointment:

Double click on an **Appointment Entry** to open and make changes.

Single click on an **Appointment entry** to give you editing **handles**:



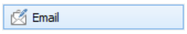
Click and drag the top handle to move the action around – e.g. into a different time slot or onto a different day. Note that there will be no record of the original time slot if you do this.

Click and drag the bottom handle to extend or reduce the duration of the action.

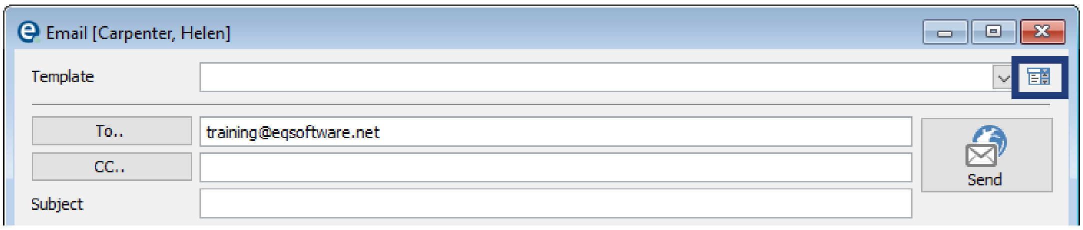
Configuring Text and Email Templates

If you find that many of the texts or emails you're sending contain the same/similar information, you can configure templates to do most of the work for you.

Email Templates



From the customer screen, select a customer and click the "Email" icon on the left. Click on the pop-up box icon in the top right hand corner. Please note that this screen can be accessed from many different places – anywhere that you can send an email, you can create a template for it.

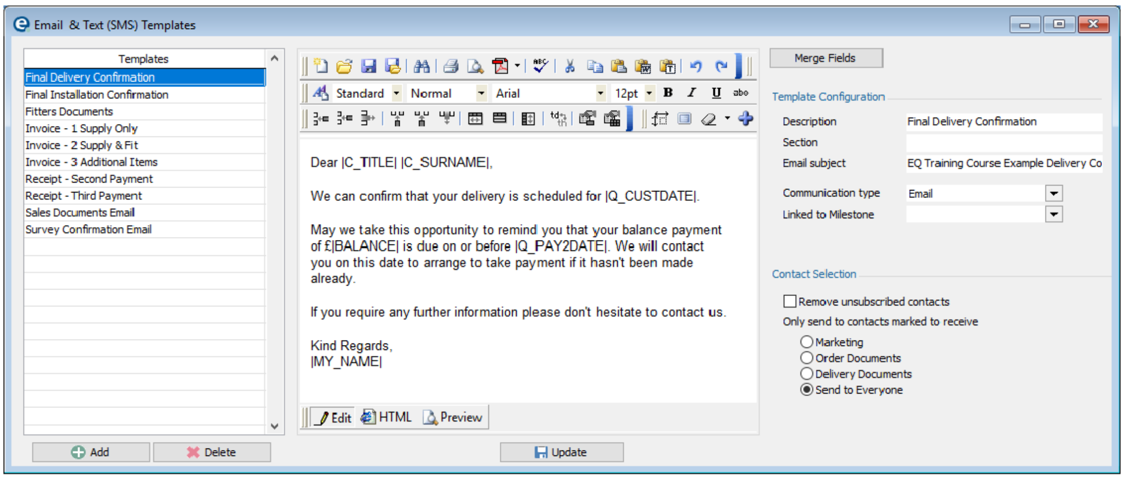


This will open a window to allow you to create your templates.

Start by clicking **Add** and giving your template a name, for example Quotation. Press **Enter**.

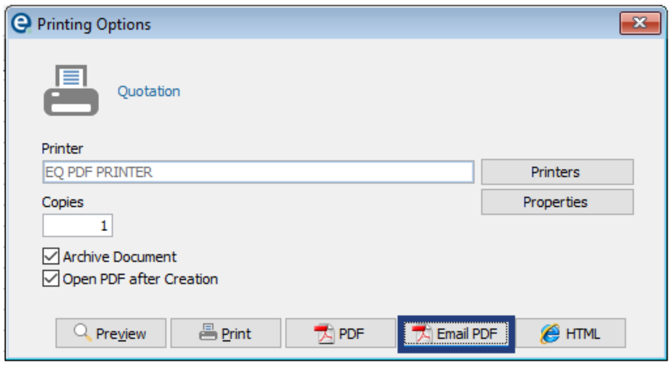
Click into the subject line field and enter a subject line for your email, for example [Your Company Name] Quotation. Select what type of template this is, i.e. Email or Text.

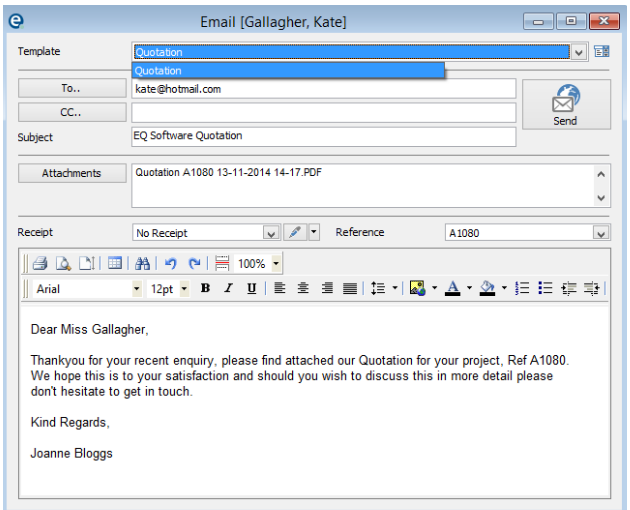
In the space at the bottom, type what you would want to say. Use the **Merge Fields** icon to pull information across from EQ into the body of the email, such as the customer's name or the Quotation reference.



Click **Update** to save and close.

To use the example above, open a Quotation, click **Print**, click **Print** again and select **Email PDF** from the options.





From the email screen, chose your template from the drop-down. This will pre-populate your email with the details you'd entered when you configured the template, and automatically attach a PDF of the Quotation to your email.

Click **Send** to send the email and complete the process.

If you are using templates to confirm appointments, ensure you have the correct appointment highlighted in the communication tab before you send the email.

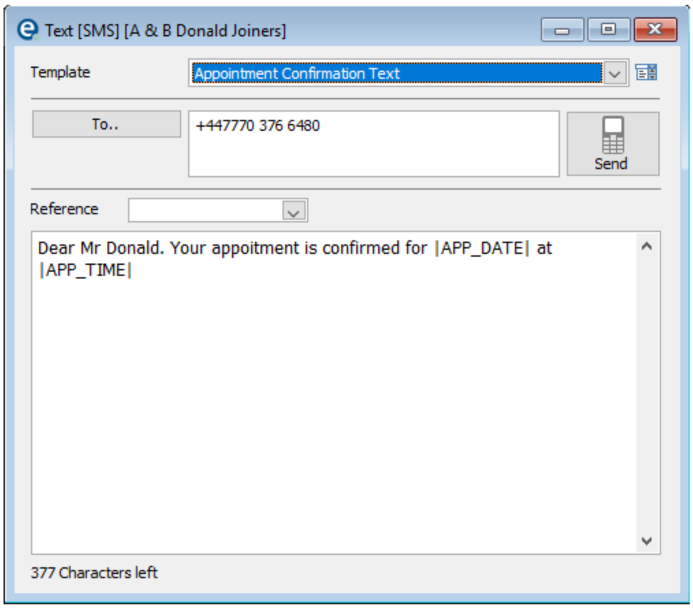
Templated emails can be sent from a number of places, including, but not limited to: Customer Screen, Supplier Screen, the Print Menu of Quotations, Acknowledgements, Receipts, etc

Text Templates

From the Customer screen, select a customer and click the **Text (SMS)** icon on the left. As with emails, click the pop-up box in the top right-hand corner to configure your template. Follow the steps above, omitting a subject line (text messages don't need them) and choosing the type to be text.

Try to keep text messages as short as possible – 1 credit = 160 characters. 161 characters will use 2 credits. Contact our sales department for current pricing information on these.

Templated texts can be sent from the customer screen and many of the Projects screens.

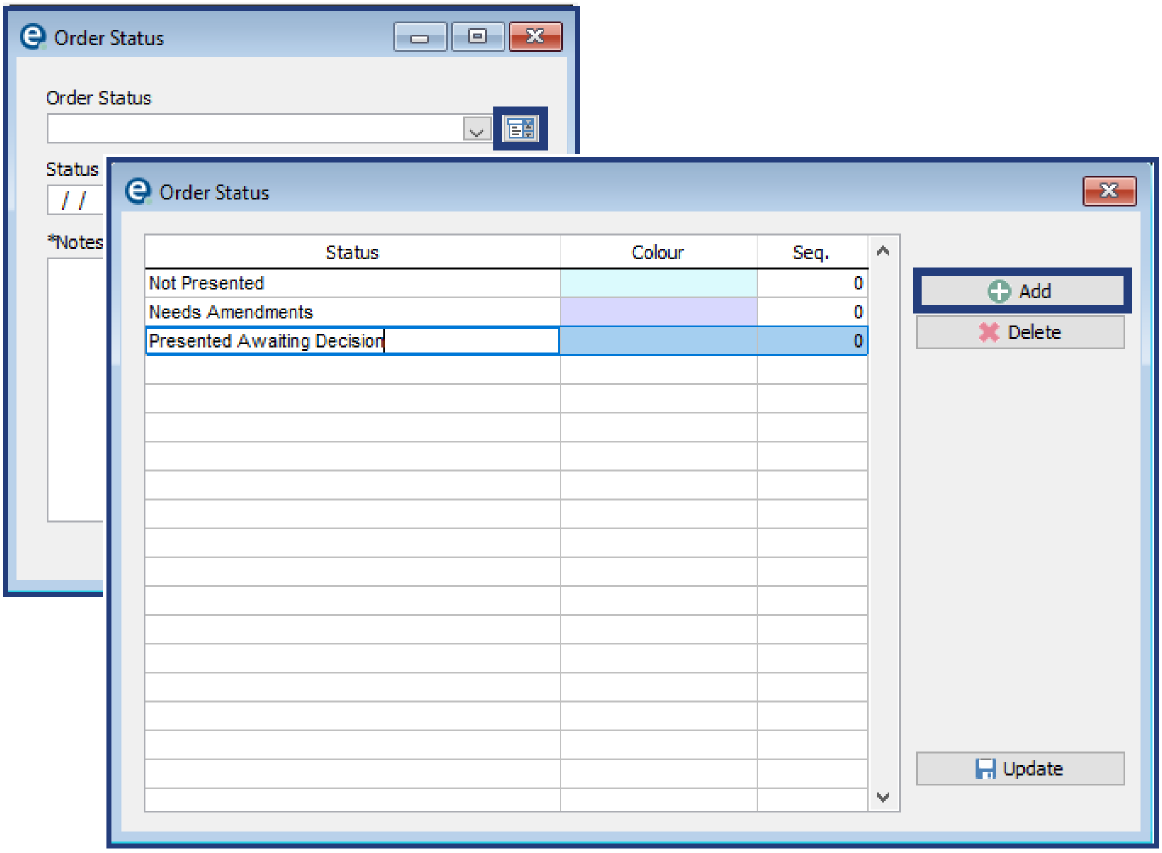


Quote/Order Status

A status can be applied to both Quotations and Sales Orders. You can customise these statuses yourself to suit your business operations.

Creating statuses

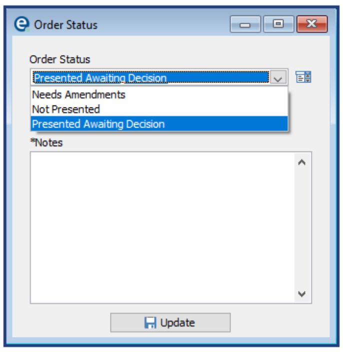
Right click on any quotation or sales order **reference number**, then select **Order Status**. Then click the **Edit Popup Contents** icon to the right of the order status popups.

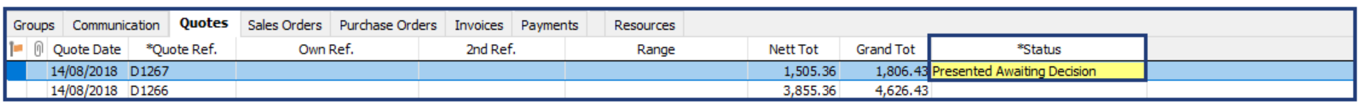


Click add and enter all of the statuses you require. Right click the colour box to apply a colour to your status and use the seq. column to control which order the statuses appear when applying them to quotations and orders.

Applying statuses to quotations and orders

To apply a status to your quotation or order, right click the reference number and select **Order Status**. Then select the status you wish to apply from the popup list and enter notes if you wish.





Once the status has been applied you can view this in the customer quotations/sales orders tab and some of the projects screens.

Projects

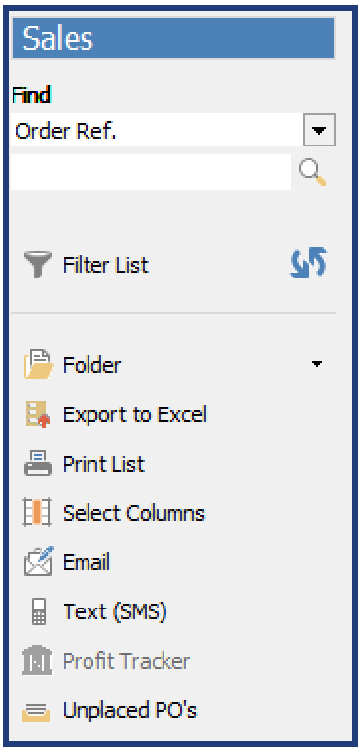
Unlike the Customer screen which allows you to view entries on a customer-by-customer basis, the Projects screens are a centralised area of the system to view all communication and documentation, enabling effective management of the sales order process from beginning to end. Each screen can be opened independently, multiple times and share the same common features.

The Projects screens are accessed from the Project Lists icon on the main Toolbar or by clicking Contact History, Quotations, Sales Orders or Workflow.

The list of Projects Screens are:

- Contact History
- Quotations
- Sales Orders
- Delivery Notes
- Payments
- Payments Due
- Invoices
- Purchase Orders
- Purchase Invoices
- Collection Notes
- Returns Notes
- Workflow
- Saved filters – Allows you to delete any saved filters you've created

Common Features of Projects Screens



Find - Choose which field you want to look for using the dropdown box, then enter the information into the blank box below. Click the magnifying glass to highlight the entry.

Filter List - Allows you to filter the list of entries

Folder - Opens the customer folder.

Export to Excel - Allows you to export either the full list of entries, or a filtered list (if you've applied a filter), into excel for editing outside of EQ.

Print List - Prints either the full list of entries, or a filtered list if you've applied a filter.

Select Columns - Allows you to choose which columns are visible in the top part of the screen (user specific).

Email - Allows you to email to selected customer.

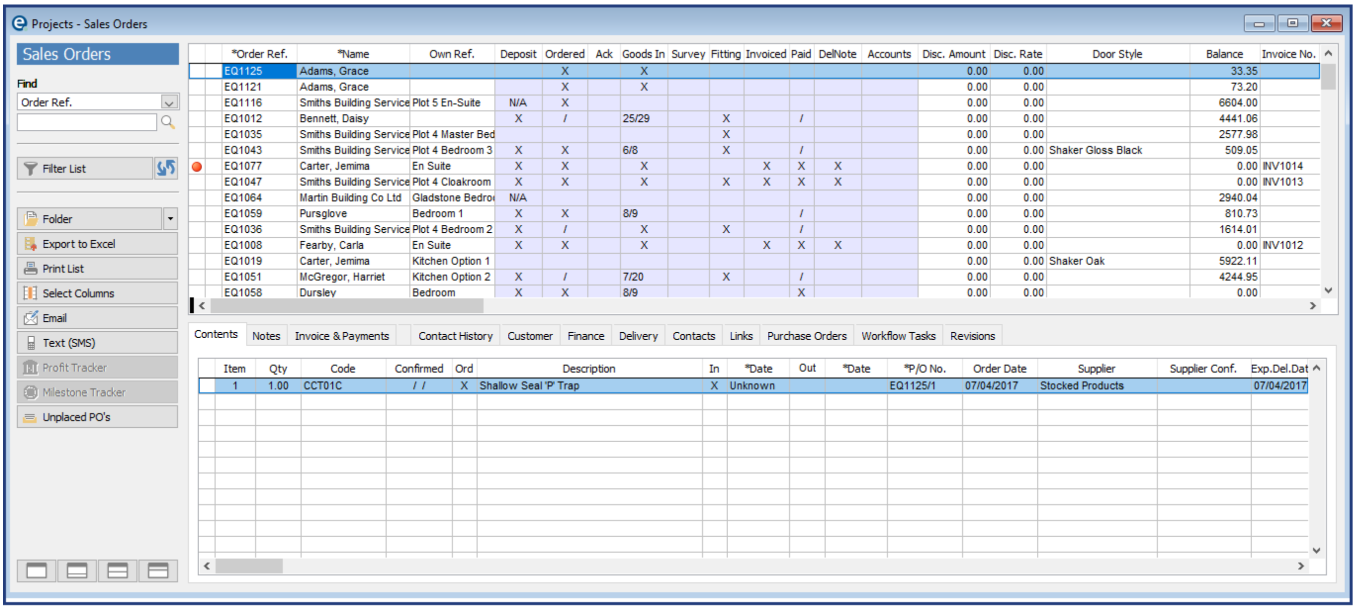
Text (SMS) - Allows you to send a text message to the selected customer.

Hints & Tips

You can customise your toolbar to show the project screen icons that you use most often. To do this **Right Click** in the blank toolbar space and select **Toolbar Buttons**. You can then click the icon you would like to appear on your own toolbar. This changes your own toolbar. If you would like to change the default toolbar for all users please speak with your Key User.

Changing the layout of the project screens

Each of the project screens are set out in a similar format. They show a list of items (contact, sales orders quotations etc.) at the top, a button stack on the left and tabs across the bottom.



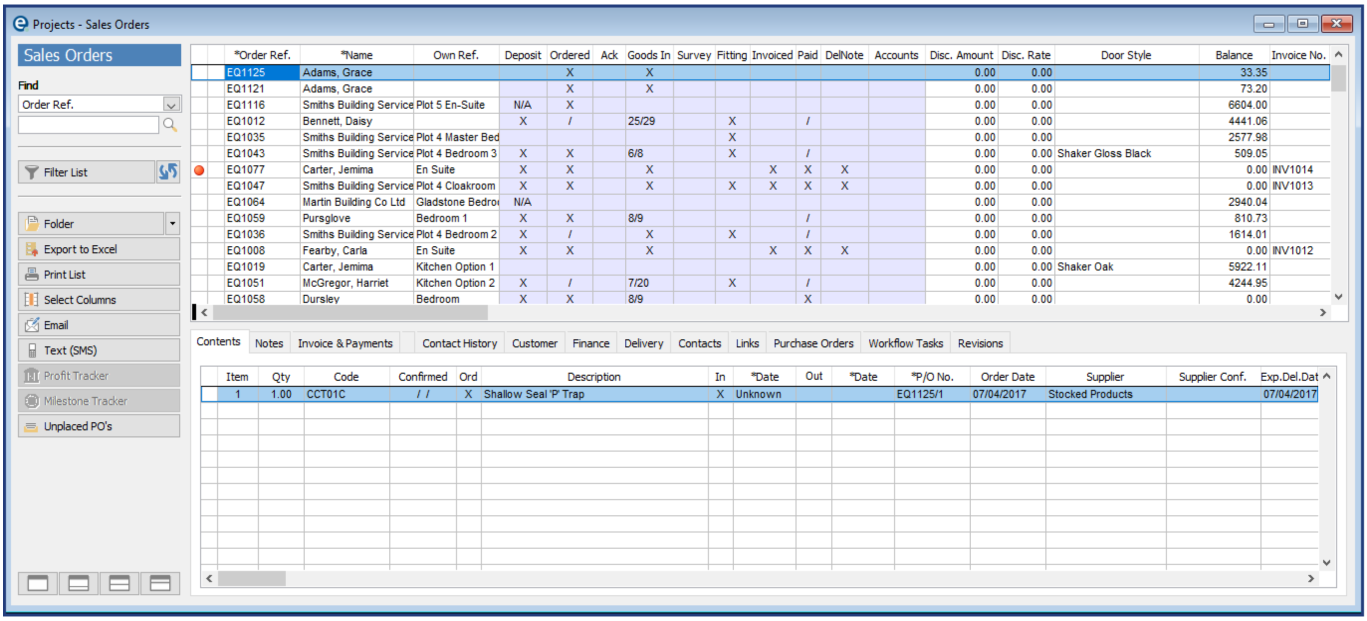
- You can change the size of the bottom tab area using the buttons to bottom left of the screen.

- Drag and drop column headers to change the horizontal order of columns. Close the screen after each change to save the layout.

- Apply a filter and click on a column header to reorder your entries in ascending order. Click again to reorder the entries in descending order.

Projects > Sales Orders

Use this screen to see an overview of the orders on your system, to see what stage they are at and filter accordingly to show relevant information. You can also **Right Click** on a **Sales Order Ref** to work on it.



The top part of the window lists all Sales Orders and the Milestones (see below) associated with each of these. Select an Order to see the detail across the tabs at the bottom part of the screen.

Project Screen Tabs

Contents	-	Displays the contents of the Sales Order along with relevant item-specific status information.
Notes	-	Displays any internal notes entered against the Order.
Invoice & Payments	-	Lists all invoices raised, payments expected, payments received, Order total and overall balance outstanding.
Contact History	-	Can show either all Contact entries for the Customer, or just those relating to the Sales Order. By default will show all entries for the Customer.
Customer	-	Displays the Contact Information for the Customer as entered in the General Tab on the Customer Screen.
Finance	-	Shows the Finance Information (if used).
Delivery	-	Shows the Delivery Information relevant to the Order.
Contacts	-	Shows additional Customer Contact Information.
Links	-	Lists any Linked Orders – i.e. Add Ons, Remedials, Collections and Returns.
Purchase Orders	-	Click back on the Sales Order in the top part of the screen to list all Purchase Orders raised for that Order.
Workflow Tasks	-	Displays all Workflow tasks for the selected quotation (Workflow is an additional purchasable module).
Revisions	-	Shows all revisions relating to the selected quotation.

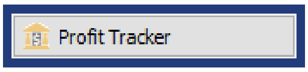
Filters

Filters can be very useful on this screen. For example, filter by Delivery Date Next Month and Outstanding Milestone Goods Ordered to see all orders due for delivery next month where goods have not been ordered.

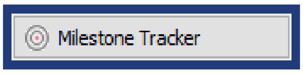
You can save this filter and it will appear in the filter menu beneath the Project/Communication button.

Button Stack

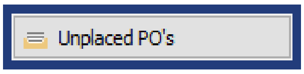
The below button is available in addition to the ones described on page 16.



- Additional Module requiring activation. Contact our Sales department for more information.



- Additional Module requiring activation. Contact our Sales department for more information.



- Apply a filter and click this to see a list of Purchase Orders that still require placing with your Suppliers.

Milestones

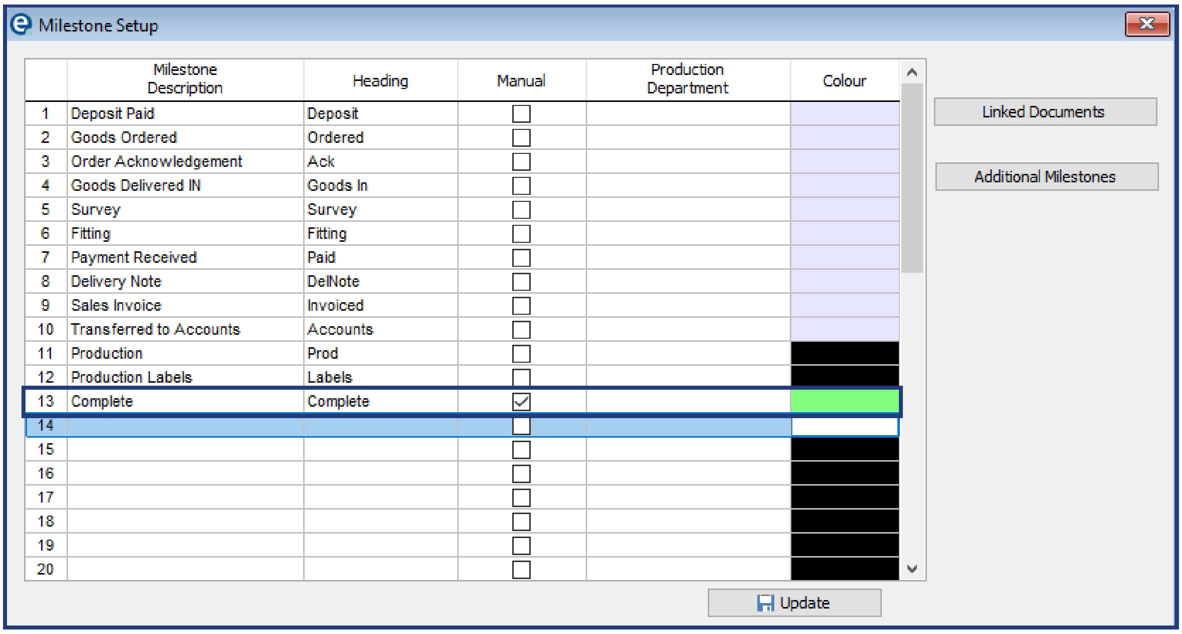
Milestones are the columns highlighted in purple. They are the stages of an order and show whether each stage has been completed or is still outstanding. By default these are automatic (they complete as you complete a process within EQ) but you can change them to be manual and also add your own in.

Right Click on any **Sales Order Ref**, select **Milestones**, then **Milestone Setup**.

Milestones 1 through to 12 are prefilled and cannot be changed. You can add your own manual milestones here. These milestones will be crossed manually by double clicking the box on the Projects Sales orders screen.

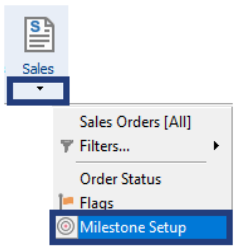
Adding Manual Milestones

To add a manual milestone click in an empty **Milestone Description** box and type the name of the milestone. Then enter a **Heading**. This will appear at the top of column on the Projects Sales Orders screen. **Tick** the box for **Manual**, select a **Colour** and click **Update** to save and close.



Turn your milestone on by selecting it in the **Select Columns** button. Scroll to the right of the screen and you will see your manual milestone. You can click and drag the column header to put it in a suitable place.

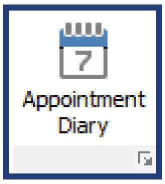
To complete a manual milestone simply **Double Click** the empty box.



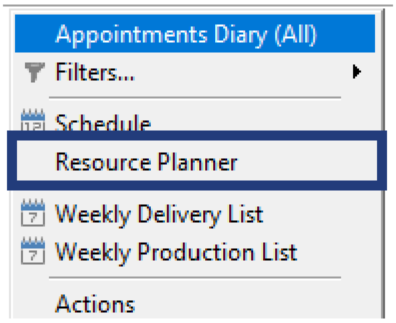
Hints & Tips

You can also access the Milestone Setup window from the arrow beneath **Sales**.
Click Orders > Save Layout to all users so that everyone can see and use your new milestone.

Resource Planner



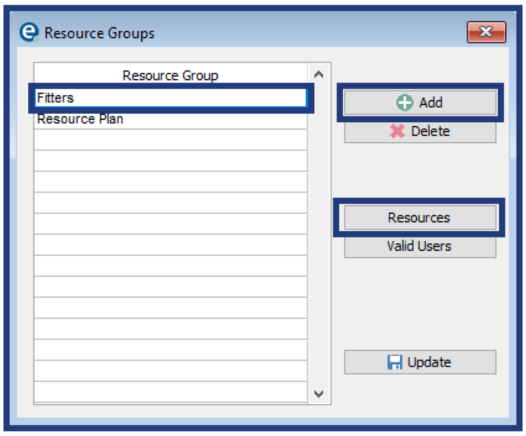
The Resource Planner is a diary that spans multiple days, rather than having set times for appointment slots, and is usually utilised for fitters.



Access the Resource Planner by clicking the drop down arrow under Diary and selecting Resource Planner.

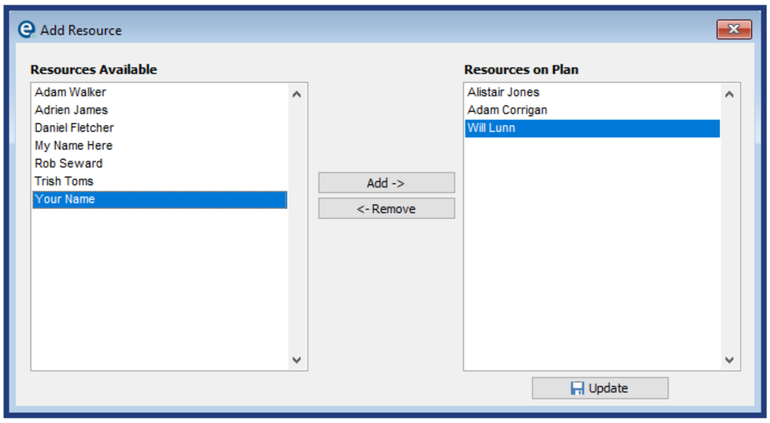
Create Resource Plans

You may need to configure at least 1 resource plan in the first instance. Click Resource Groups to add resources to a plan. You can add as many plans as you wish, so you could have one for fitters and another for electricians, or a plan for a specific project.



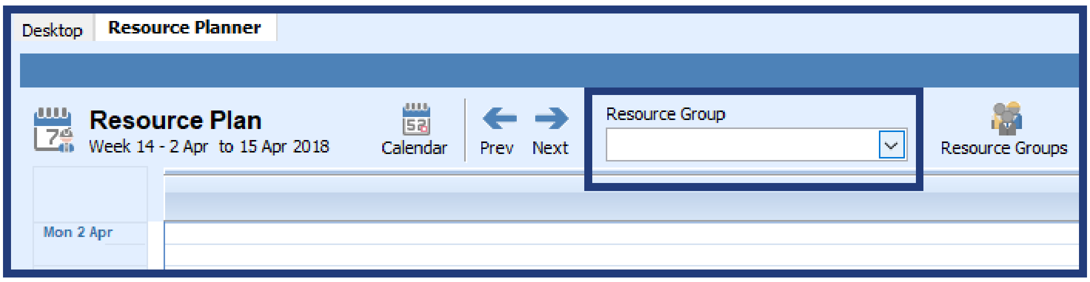
Click Add to create a new plan. Give your plan a name and then click Resources.

Double click on a resource to add them onto your plan. Click Update to save and close.

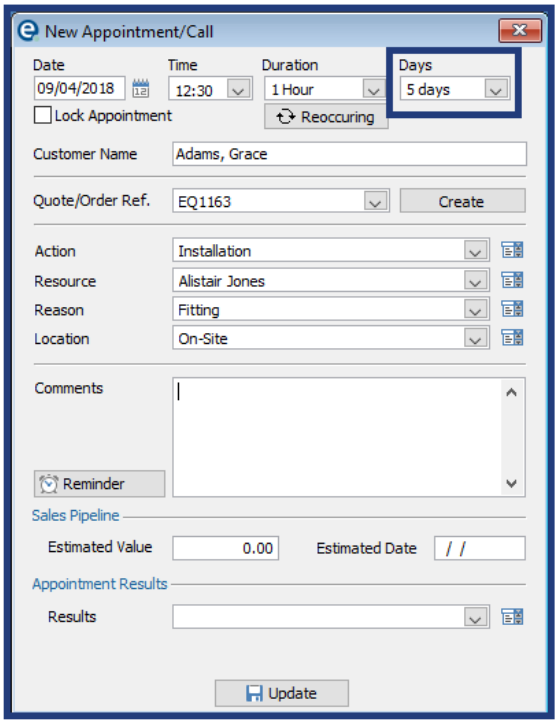


Once you have finished creating your plans, click **Update**.

Select your plan on the main resource planner screen by clicking the drop down under Resource Group and selecting your required plan.



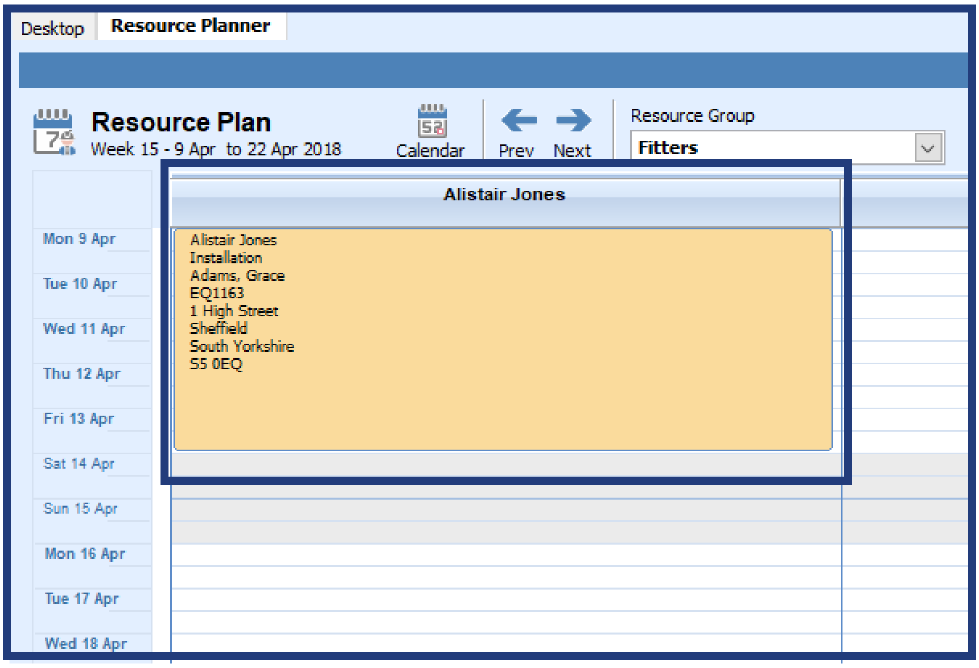
Adding entries



From the open Resource Planner and with a plan selected, double click on a time slot under a particular Resource. Fill in the relevant information – you will notice that you can set the duration to be multiple days from here.

Click **Update**.

You will now be able to see the entry in the Relevant Resource's section of your plan. It will also appear in the Customer's Communication tab and Projects>Contact History.

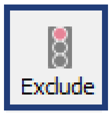


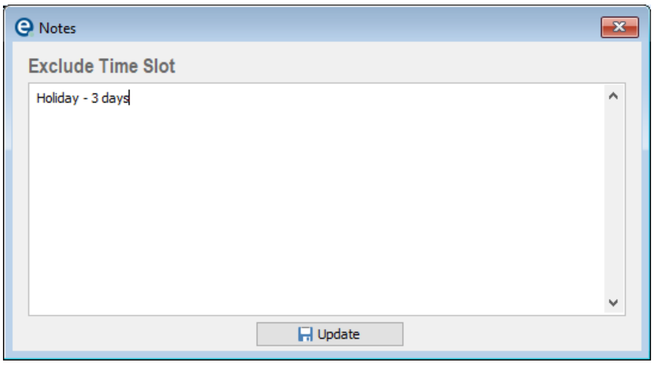
Editing entries in the Resource Planner

You can double click on an entry to change the details of it. Alternatively, you can single click on an entry to drag and drop it by clicking on the handle at the top. This will allow you to move the entry to a different date, or maybe a different Resource should you wish.

Excluding Time Blocks

You may wish to exclude available working days – for example, if a Resource is on holiday. With an open Resource Plan, click and drag to select the days that you wish to exclude. Click the Exclude icon at the top of the screen.

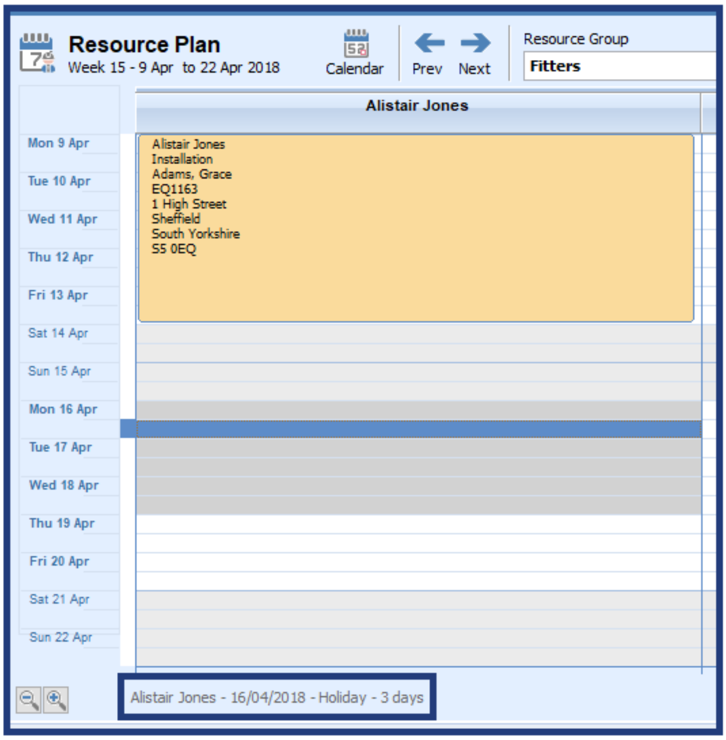




You can type some notes as to why this time block is excluded, and click **Update**.

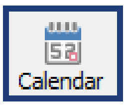
This will now block those days out of the Resource Planner.

Clicking on a date will show the notes at the bottom as to why the time block is excluded.

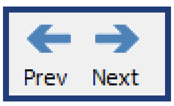


If you try to book anything in during the excluded days, EQ will automatically extend the duration of the entry on this screen to cover the excluded time block.

Navigating through the Resource Planner



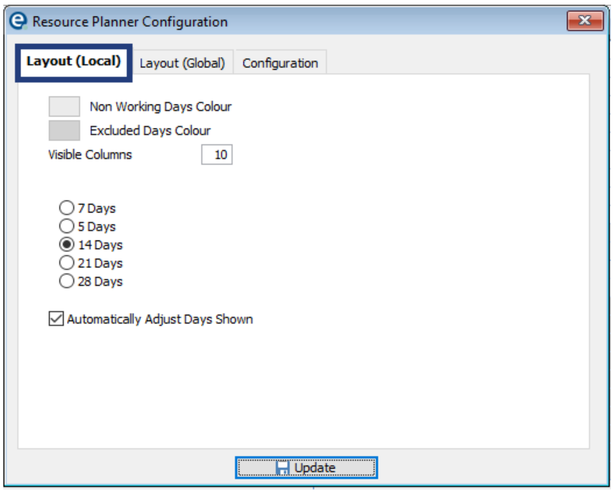
Click the **Calendar** icon to quickly jump to a date



Use the **Prev** and **Next** buttons to navigate to the previous or next week's views

Customising the Resource Planner

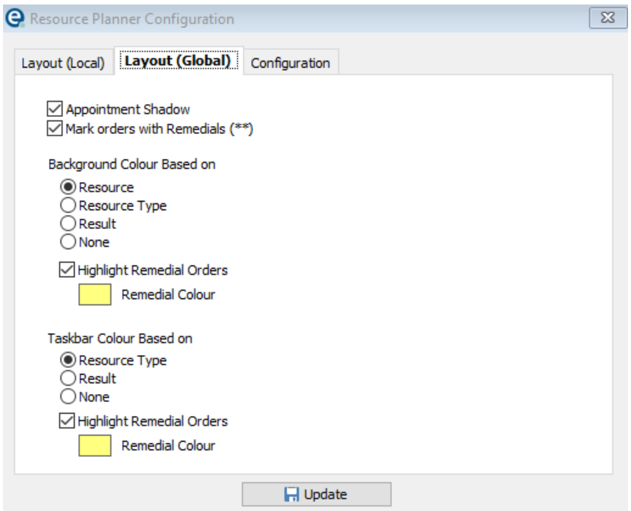
Click the Customise Icon at the top. Settings you change in here will affect all users.



Layout (Local)

Here you can choose the colours for Non Working Days (as specified when you configured your Resources), Excluded Days, number of entries visible per resource for the same day, and number of days shown.

Layout (Global)



Choose whether or not you wish to show a shadow on your entries, and whether or not you wish orders with Remedials to be marked.

You can select which colour the main part of an entry is based on, and the colour of the taskbar (side bar) for each entry. You can also highlight entries relating to Remedial Orders.

Click **Update** to save your changes.

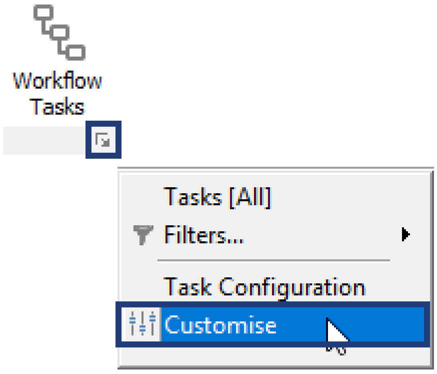
Hints and Tips

Create a quick-access button to the resource planner by right clicking in the grey area on your toolbar, clicking customise toolbar and selecting Resource Planner. Click Update User to save your changes.

Workflow Part 1: Configuration

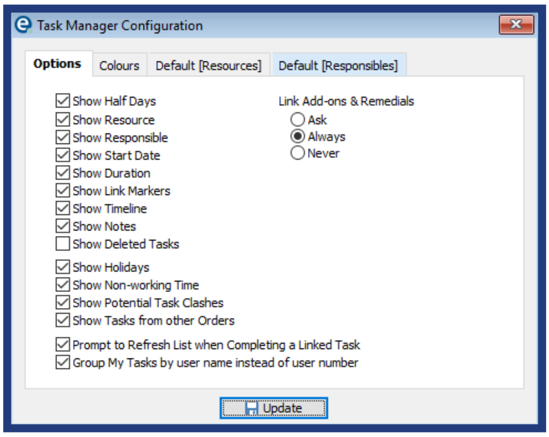
Configure Default Settings

From the drop down arrow under the main Workflow icon, select Customise.



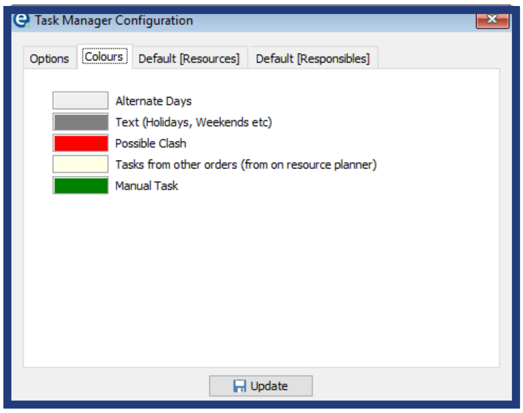
Options

Use this tab for configuring the Order Task List

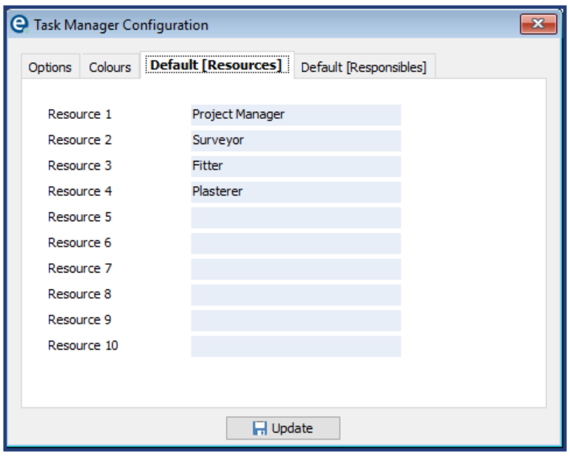


Colours

Right click in each coloured box to set the colours on the Order Task List



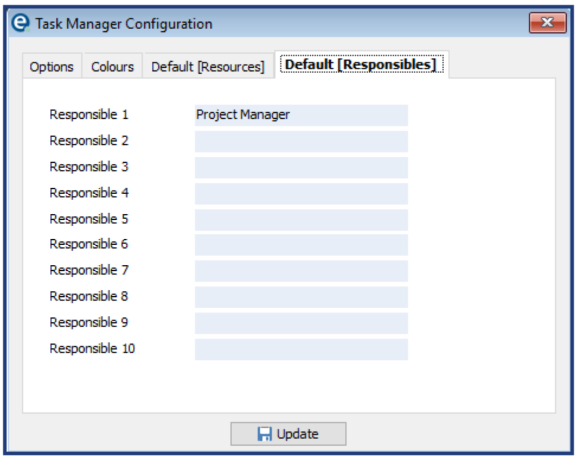
Default (Resources)



Enter a description for the type of resource that will be completing the task. Tasks can be assigned to Default Resource Type, and Default Resources can be set against each Resource Type on an order-by-order basis. For example, Resource 1 might be "Surveyor". We can then set the Surveyor (Resource Type) against more than 1 task, even though we might have 3 surveyors working for us. The Surveyor Resource can then be set against an order, so that all the tasks with the Default Resource of "Surveyor" inherit the same Resource against them. You can still over write the Default Resources on an order by order, task by task basis.

You can have up to 10 Default Resource Types. This is useful for assigning Communication entries against tasks and for general record keeping.

Default (Responsibles)



Responsibles are EQ Users who can view their own Desktop Task List. Like Default Resources, tasks can be automatically assigned to a type of Responsible (EQ User), and then the actual Responsible User can be assigned to each order on an order by order basis. You can have up to 10 Default Responsibles + the Sales Person.

It is likely that there will be some duplication in Resources and Responsibles, in a similar way that there is duplication between Users and Resources, as this is ultimately what these Defaults are.

Configuring Tasks

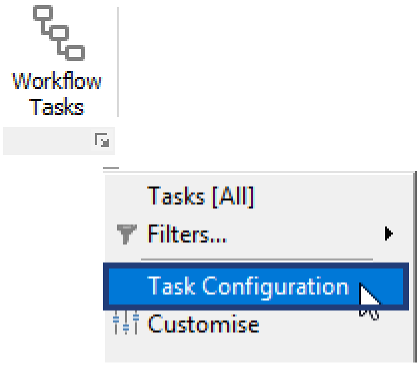
Before starting to setup your Workflow module you will need to define the tasks that are required. This will mean going through all of your business processes step by step to understand what is important and what determines whether a task is relevant. You can start to create tasks as soon as a quotation is saved and they can be linked to quotations and/or sales orders.

Examples of tasks:

- Send sales documents to the customer
- Check the signed order confirmation has been received
- Book a survey
- Book a fitter
- Place purchase orders
- Send delivery/installation confirmation to the customer
- Contact the customer to take the 2nd payment
- Prepare the fitters paperwork
- Contact the customer to take the final payment
- Send the invoice

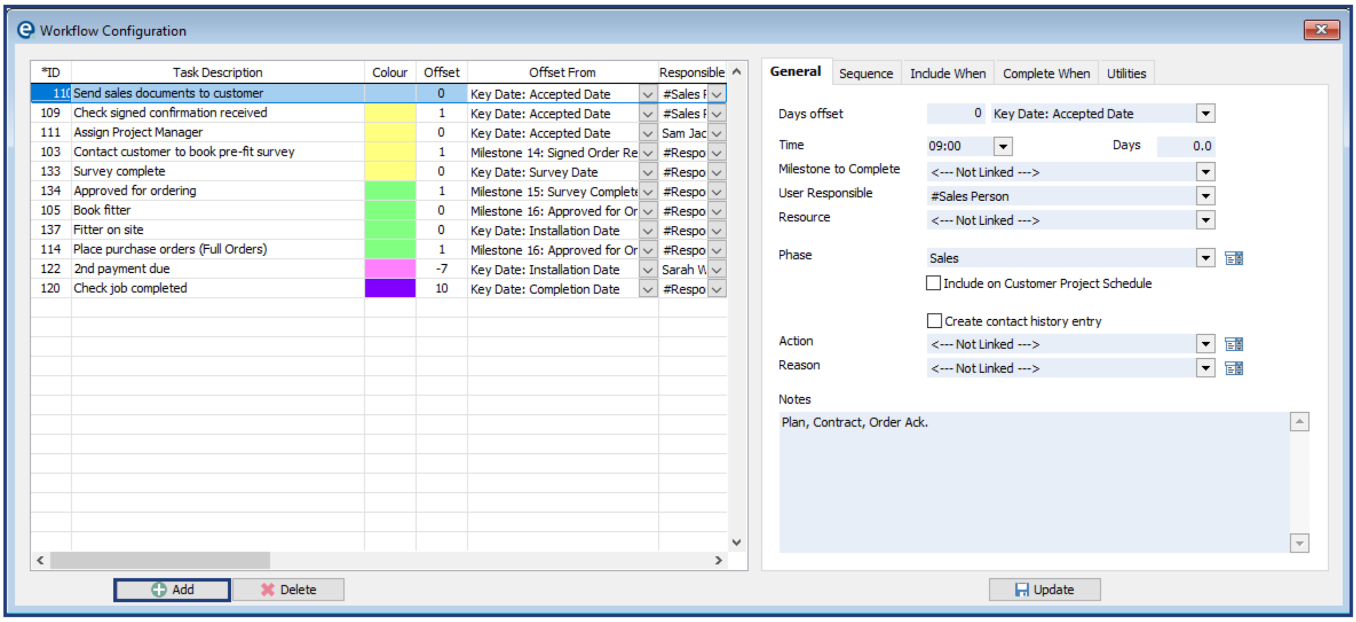
Some of these tasks will be dependent on other factors. For example, there is no need to book a fitter if the order is for supply only. You can configure which tasks are relevant to an order, who they're relevant to, and when they become relevant in Task Configuration.

Step 1: Add Tasks



Open the task configuration window by clicking the drop down arrow under the Workflow icon on you main toolbar.

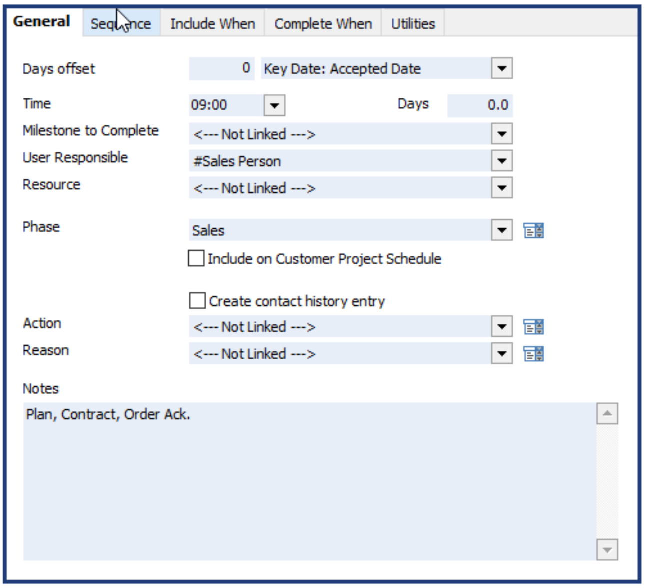
This is the screen where you set each individual task and its conditions.



Click  to add a new task. Give it a description and assign a colour by right clicking in the box to the right.

You will then need to configure the options for this task by working your way through each of the tabs at the top.

Step 2: General Tab



This is where you can configure some general settings for your task – when it is due, who is responsible for completing it, whether or not you want to link milestones and/or Communication entries to your task.

Days Offset

When your task is due, based on the number of days before or after a Key Date or completed milestone.

Time

The time the task begins. This is useful if you wish to create a Communication entry for your task (see below).

Milestone to complete

Select the milestone that you want to automatically complete when the task is completed. This needs to be configured as an Additional Milestone, and ticked to be manual in Milestone Set Up.

User Responsible

This is the EQ user that is responsible for ensuring the task is complete – it will appear on their desktop tasklist. You can select from the list of defaults, the Sales Person or an individual User

Resource

This is the resource who is going to complete the task, and the name of the resource on the contact entry (if linked).

Phase

Allows you to create phases and assign tasks to them. Useful for filtering.

Include on the Projects Tasklist Report

Tick this box if you want this task to print on the customer facing document.

Create Communication

Tick this box if you want to automatically create a communication entry for this task.

Action

The action assigned to the communication entry (if created).

Reason

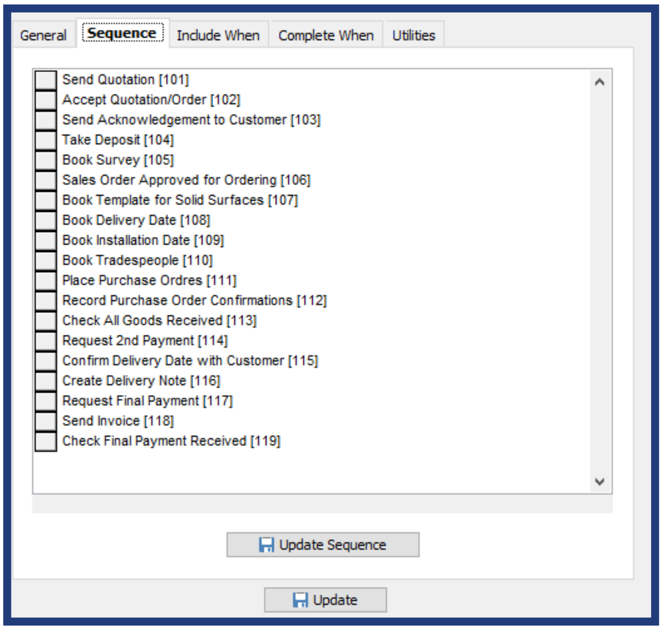
The reason assigned to the communication entry (if created).

Notes

Additional notes about the task to assist users. These will also appear in the notes for a communication entry if you have chosen to create one.

Step 3: Sequence Tab

Drag and drop to change the order of the tasks as they appear in your master Task List. They will display in this sequence when applying tasks for an order. Don't forget to click Update Sequence once you have finished to save your work.

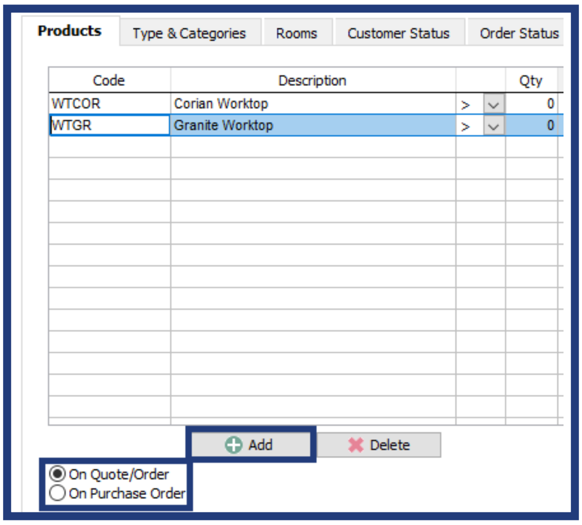


Step 4: Include When Tab

By default, all tasks are relevant to all Sales Orders. This tab allows you to determine the conditions as to whether a task is relevant to an order or whether it can be ignored.

Products

Use this tab to select which specific products your selected task relates to. This is particularly useful for example with solid surfaces when you need to book a template.



Select whether you want the task to appear based on whether the item/s are present on the Quote/Order, or select On Purchase Order if you only want to see the task when the purchase order for the item/s have been placed with the supplier.

Example Task

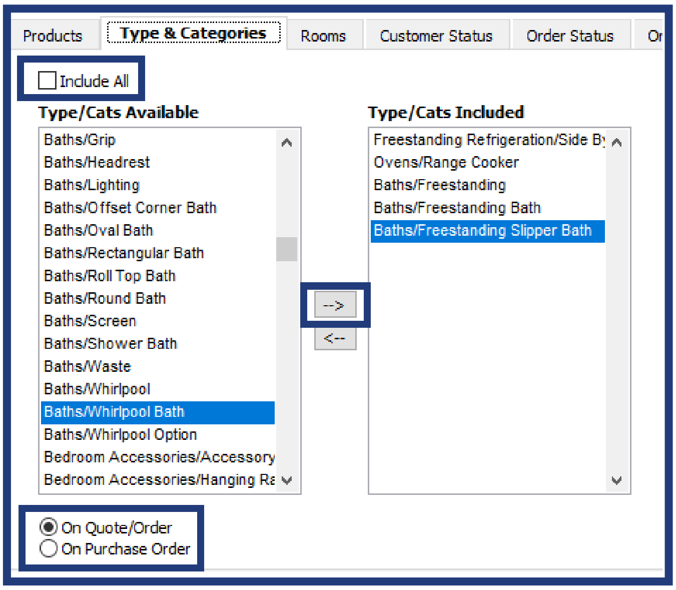
Book Template for solid surfaces and include your codes for Granite/Composite/Quartz etc.

Hints & Tips

This list uses OR logic: it will generate the task if any of the items are present, as long as all other Include When conditions are satisfied.

Types & Categories

By default, all product Types & Categories are included. This tab allows you to select which specific Product Types & Categories will generate the task.



Untick Include All and then highlight the Product Type/Category that your task relates to, and click the arrow in the middle to add it to the list of included types/categories.

Example Task

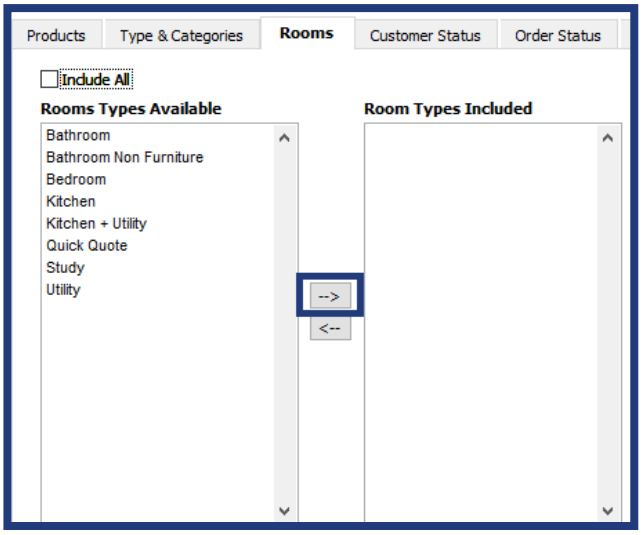
Book 2 Man Delivery for freestanding baths/range cookers/side by side fridge freezers etc...

Hints & Tips

This list uses OR logic: it will generate the task if any of the items are present, as long as all other Include When conditions are satisfied.

Rooms

This is where you can select which Room Types your task relates to. By default, all Room Types are ticked.



Untick Include All and then highlight the Room Type your task relates to, and click the arrow in the middle to add it to the list of included Room Types.

Example Task

Customer Services to contact customer and ask if they'd like to hire rigid hanging boxes for their clothes during Bedroom refurbishment, which would only be relevant to the Room Type of Bedroom.

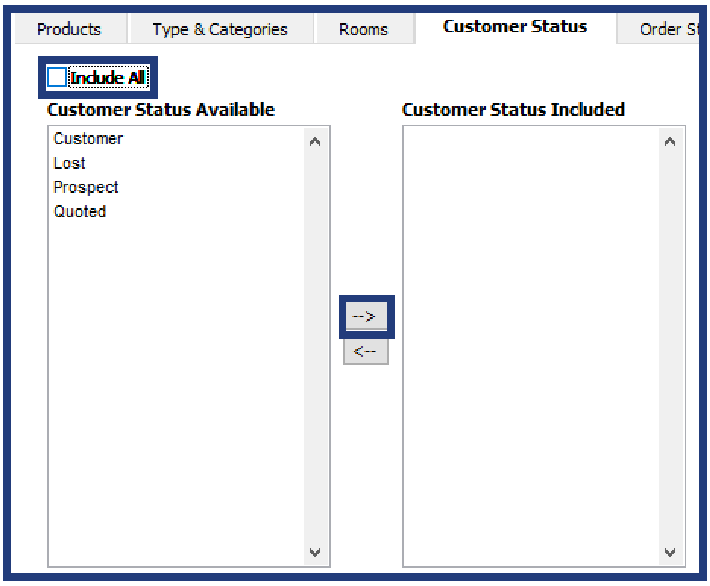
Hints & Tips

Room Types are configurable and can be changed in your System Configuration settings.

This list uses OR logic: it will generate the task if any of the items are present, as long as all other Include When conditions are satisfied.

Customer Status

This allows you to generate tasks based on the Customer Status. By Default, all statuses are ticked.



If you want tasks to only appear based on a customer status, untick Include All, select which statuses you want to include and move them into the list on the right using the arrow button in the middle.

Example Task

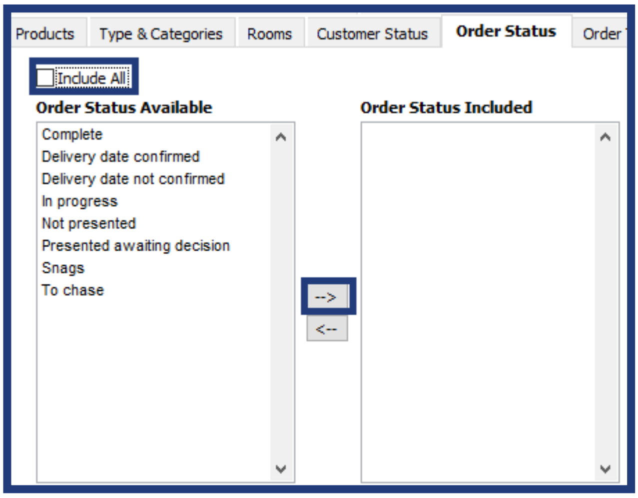
Chase customer for decision on quote only when the status is Quoted.

Hints & Tips

Customer statuses are configurable. The defaults are Prospect, Quoted, Customer and Lost. EQ will ask you at various stages throughout the sales process if you would like to update the customer status.

Order Status

This window allows you to generate tasks based on the status of a quote/order. You will need to configure your statuses in the first instance prior to using this option.



By default, all statuses are included. If you only want a task to be relevant for certain statuses, untick Include All and then highlight the Order Status your task does relate to. Click the arrow in the middle to add it to the list of included Statuses.

Example Task

Contact customer to arrange delivery when the status is "Delivery Date not confirmed".

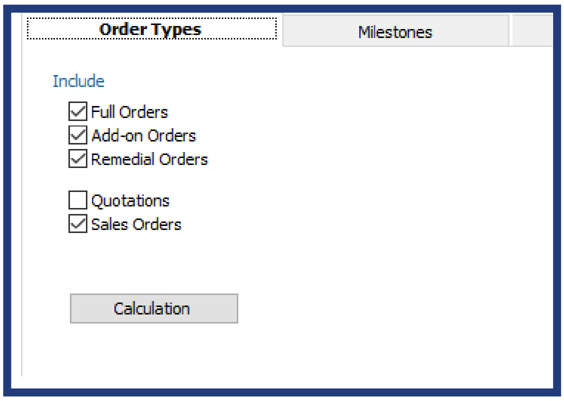
Hints & Tips

Quote/Order statuses can be configured from the drop down arrow under Sales on the Main toolbar and selecting Order Status.

This option uses OR logic – you can include multiple statuses and the task will appear if any of those statuses are true, as long as all other Include When conditions are satisfied.

Order Types

This tab allows you to differentiate which tasks are based on Quotes, Full Orders, Remedial Orders and Add Ons.



By default, all Types of Sales Orders are ticked.

Example Task

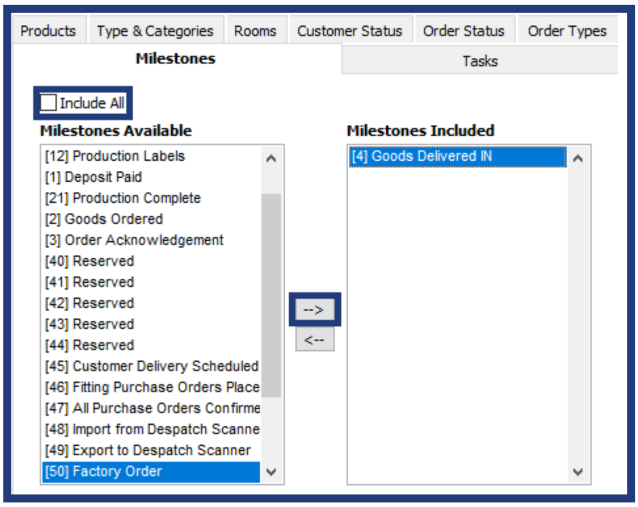
Contact Customer to request Payment would not be relevant to Remedial Orders.

Hints & Tips

Make sure you tick the Quotations option for all tasks relating to Quotations.

Milestones

Use this tab to select which milestones should be completed for the task to be included.



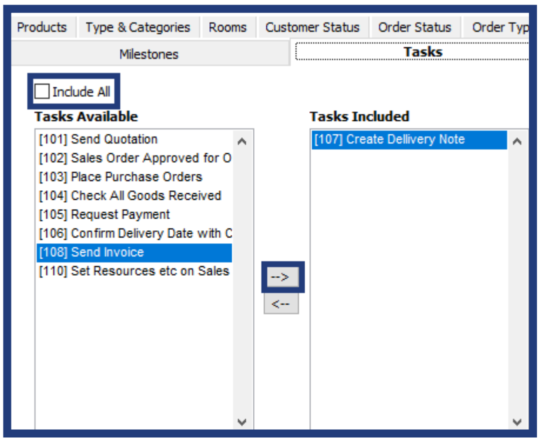
By default, all milestones are included. Untick Include All, select the milestone you wish to include and click the arrow in the middle.

Hints & Tips

Milestones can be configured by clicking the drop down arrow under Sales on the main toolbar.
This tab uses AND logic: all milestones in the list on the right must be completed in order for the task to appear and when all other Include When conditions are satisfied.

Tasks

This tab allows you to relate your task back to other tasks, so that your task will only appear if a previous task has been completed.



By default, all tasks are included. If you want your task to only appear if another task has been completed, untick Include All, select your task to link to and click the arrow in the middle.

Hints & Tips

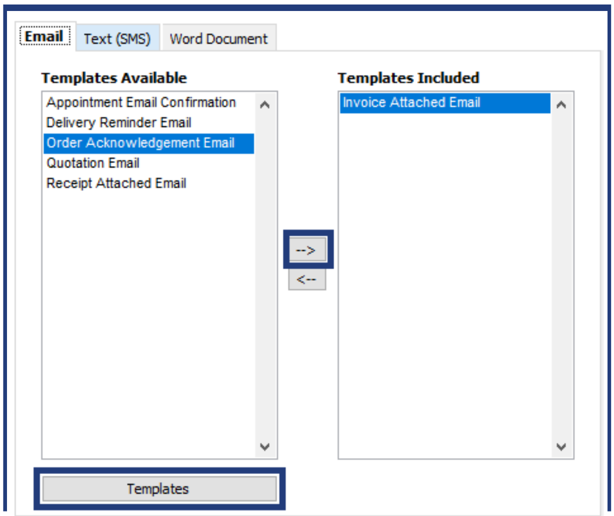
This tab uses OR logic: the task you are configuring will appear if any of the tasks you are including have been completed, as long as all other Include When conditions are satisfied.

Step 5: Complete When Tab

The usual way to complete a task is to tick it off the list (which can be accessed from a number of places within EQ). Complete When will automatically complete a task when a templated email, text or Word Processor document is generated by EQ.
If you have configured any templates already on your system you will see them under each of the following tabs:

- Email
- Text
- Word Processor

You can also create additional templates by clicking the Templates button at the bottom of the window.



To complete a task by sending a template, create and/or select your template from the list on the left, and click the arrow in the middle to add it to the list of templates that will complete the task.

Example Task
Send Invoice to customer.

Hints & Tips

This tab uses OR logic: the task you are configuring will be marked as complete if any of the templates (Email, Text or Word Processor) you are including have been sent.
Remember that 1 template could potentially complete more than 1 task.

Utilities Tab

This can only be turned on by EQ Support or your consultant.

General Hints & Tips

- Ensure you have configured Users and Resources to make Workflow as efficient as possible
- Complete steps 1-5 for each task before moving on to the next task.
- Don’t forget to click update periodically as you create tasks, to save your work.
- Be sure to test each task once you have created it.
- Start off with a basic list of tasks and let Workflow evolve gradually.
- Remove the settings “Workflow (Customise)” and “Workflow (Task Configuration)” in User Groups to prevent your configuration settings being accessed & amended by other users.

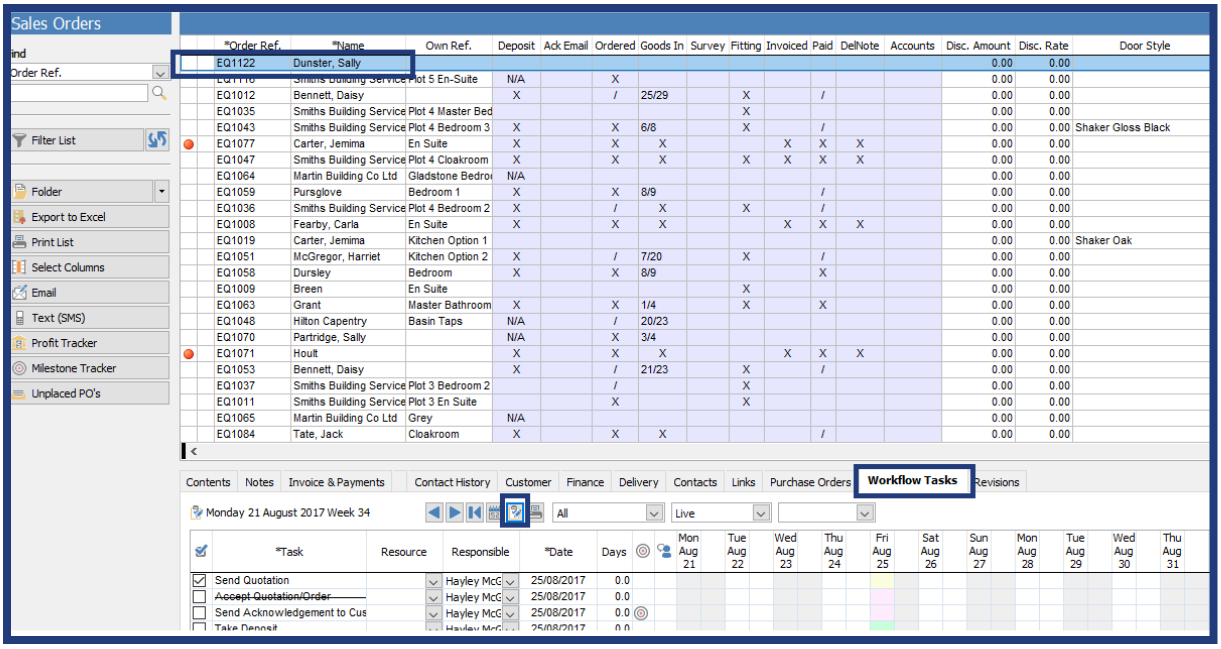
Part 2: Using Workflow

You can view Workflow tasks in 3 ways:

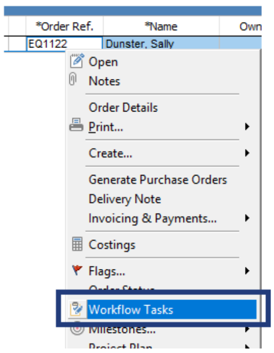
- From the Task Manager Window (order specific)
- From your own User Desktop Task List (My Tasks – user specific for all orders)
- From the Projects > Workflow window (shows all tasks for all orders for all users)

Task Manager Window

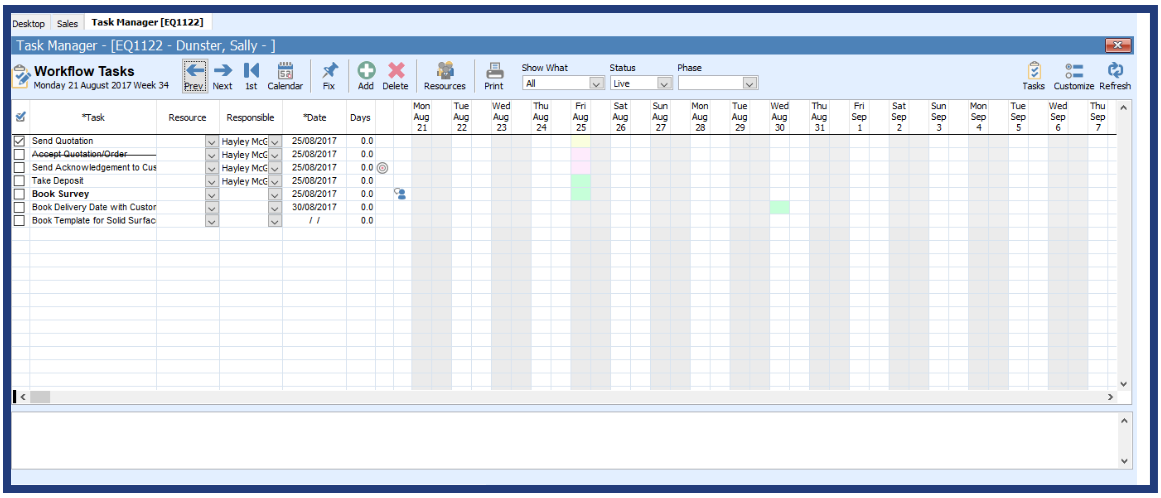
A) Locate your Order in Projects Sales Orders, click the **Workflow Tasks** tab and click the  icon to open.



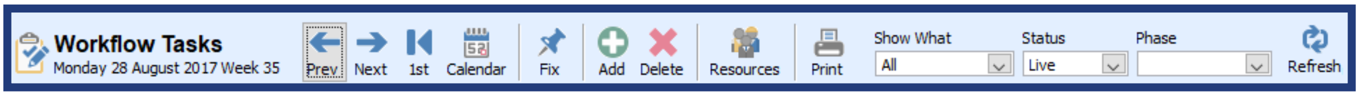
B) By right clicking on an Order reference and selecting Workflow Tasks.



This will open the following window and allow you to work with the tasks for just that one order.



Workflow Toolbar



Prev
Scrolls back 1 day.

Next
Scrolls to the next day.

1st
Takes you to the date first task due date

Calendar
Allows you to jump to a specific date

Fix
Places an "F" marker on the original due date of the task to allow comparison between original dates and recalculated dates on an order by order basis.

Add
Allows you to manually add a task to the order

Delete
Allows you to delete the selected task for the order

Print
Prints either the whole task list, or the Customer Project Schedule.

Show What
Allows you to filter tasks based on when they're due and/or just your own tasks

Status
Allows you to change the status of the task list:

> **Live:** The task list is live and calculating tasks in the background (default).
>
> **Locked**: Workflow will NOT recalculate any further tasks for the order. Tasks outstanding will remain available to view on the Task Manager, Projects > Workflow and My Task List.

Complete: Workflow will NOT recalculate any further tasks for the order. Tasks outstanding will only be available to view on Task Manager window but will NOT appear in Projects > Workflow or My Task List.

Phase

Filters the task list to show each phase of tasks.

Refresh

Refreshes the Task List to make sure all information is up to date.

Other features of the Task Manager Window

 Tasks with this symbol are linked to a Milestone. Once the task has been marked as completed, the milestone it is linked to will also be marked as completed.

 Tasks with this symbol are linked to Communication events. These can be found in Projects > Contact History / from the Customer record / from the Projects > Sales Orders Communication tab.

Double click on a date to manually change it. You will see the date turn Red to denote that this date is now locked and will NOT automatically recalculate.

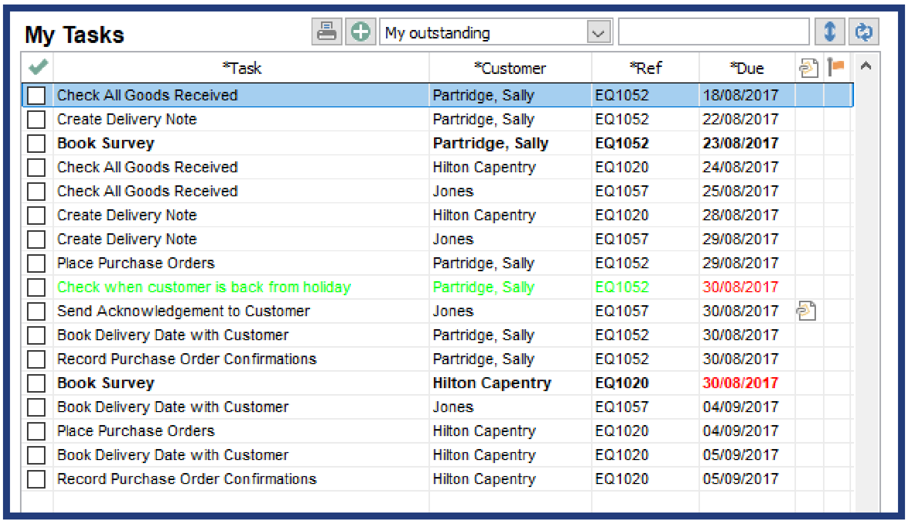
Right click on a date to lock it. This will turn the date red and will prevent the date from being automatically recalculated.

If you want to show an entry as taking more than 1 half day, you can right click on a date and select Start, and then right click on another date and select Extend To. This is particularly useful if you wish to send the Customer Project Schedule to your client, showing when events are happening (such as Delivery/Fitting etc).

The window at the bottom may contain notes relevant to the selected task to assist the user in completing the task.

User Desktop Task List

Click on the clipboard icon at the bottom right hand corner of your EQ Desktop Window to open up your own Task List.

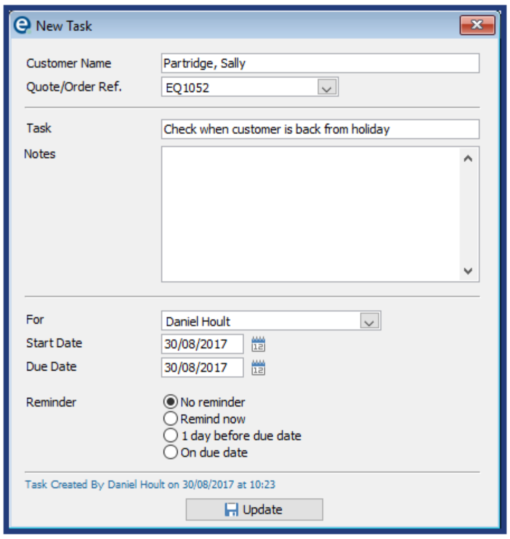


By default, all of your outstanding tasks will appear here. Tick the boxes to the left to mark a task as complete.

Features of My Task list

Use this to print the list off.

Use this to manually add tasks to the list. Note that tasks added here will not appear in the Task Manager (Order Specific), or Projects > Workflow windows.



Type the customer name (surname/company name first) and press enter to select (this isn't compulsory but may help you to find information later on).

Select which quote/order the task relates to.

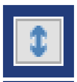
Type the description for the task, and any notes.

Set which User the task is for (whose task list it will appear on), along with its Start Date and End Date.

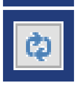
You can set a reminder to flash up on the user's screen if you wish.

Click Update to save the task.

This will now appear in the task list in green to denote it being a manually added task.



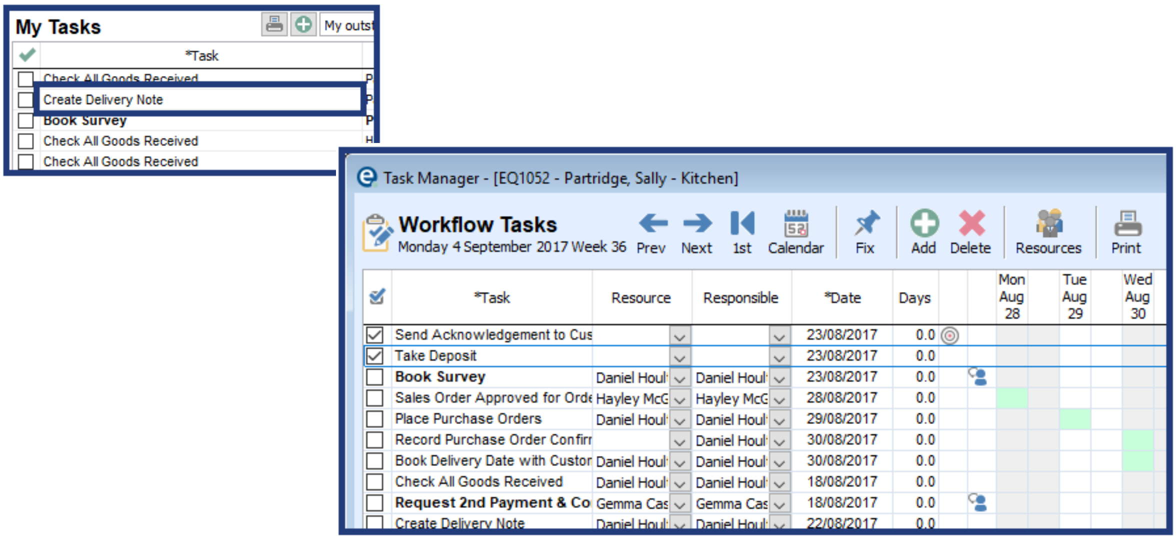
Use this to expand the Notes section at the bottom of the Task List.



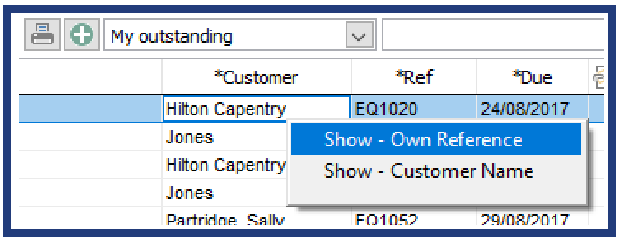
Use this periodically to refresh the task list and show newly added tasks.

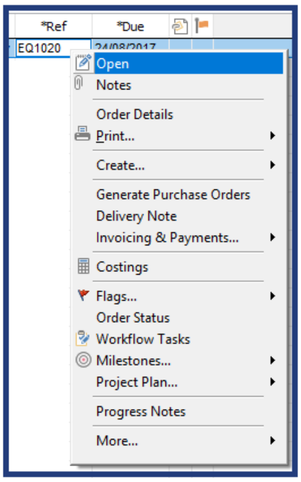
Tasks with this symbol in the right hand column have templates linked to them. Right click on the Task description to view and send the templated email/text/WP document to the customer.

Double click on a Task description to open the Task Manager window.



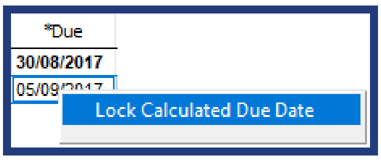
Right click on a Customer/Own Ref to select which option to show. Note that showing the Customer Name will allow you to double click and easily access the Customer Database.

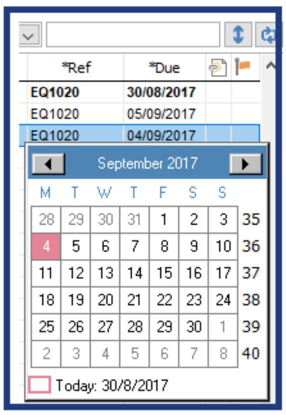




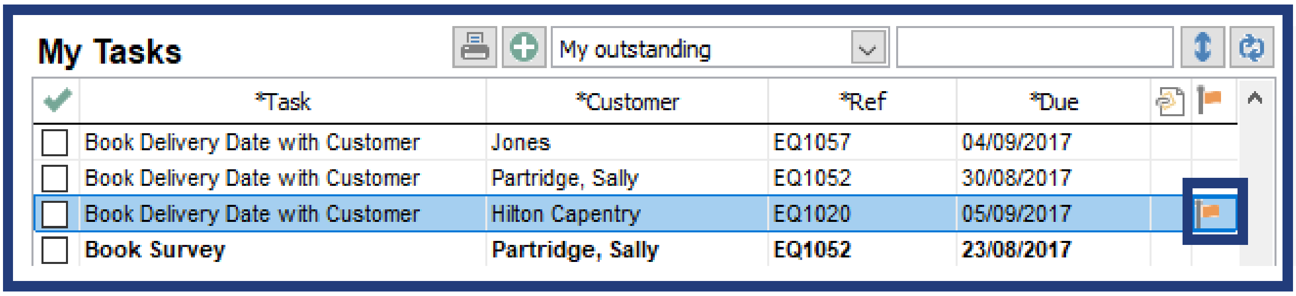
Double click on the Order Ref to Open, or right click for more options.

Double click on a date to manually override it, or right click to lock it (so it won't be recalculated).





Select a task and double click in the far right hand column to flag the task. This not only applies a visual marker against the task, but also allows you to view only your flagged tasks by applying filters (see below).

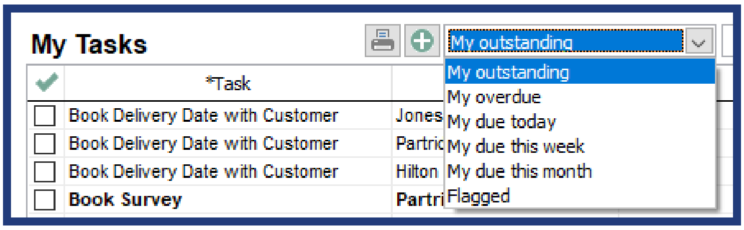


Tasks in bold have Communication entries linked to them. You can find these entries from a number of places, including Projects > Contact History, the Customer window, and Projects > Sales Orders.

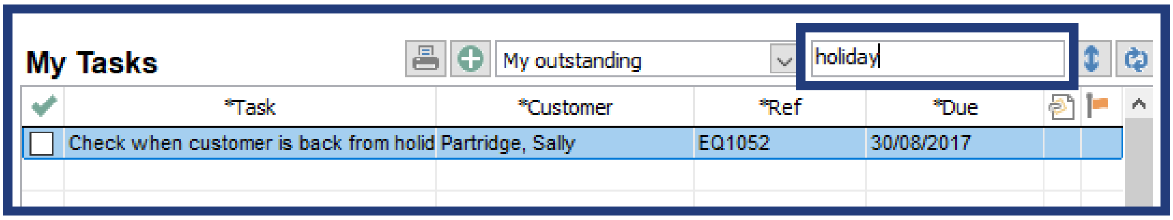
Filtering Tasks

There are 2 ways of filtering your tasks.

1) Click the drop down arrow next to My Outstanding. This will allow you to see All Tasks (My Outstanding - default view), just what's overdue, due today, due this week, due this month or flagged tasks.



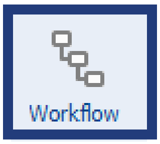
2) Type a key word into the blank box to the right of the drop down arrow to search tasks that contain this word.



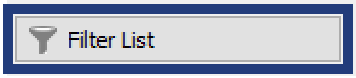
Hints & Tips

Click on the Customer column header to list all customers' tasks together on your task list

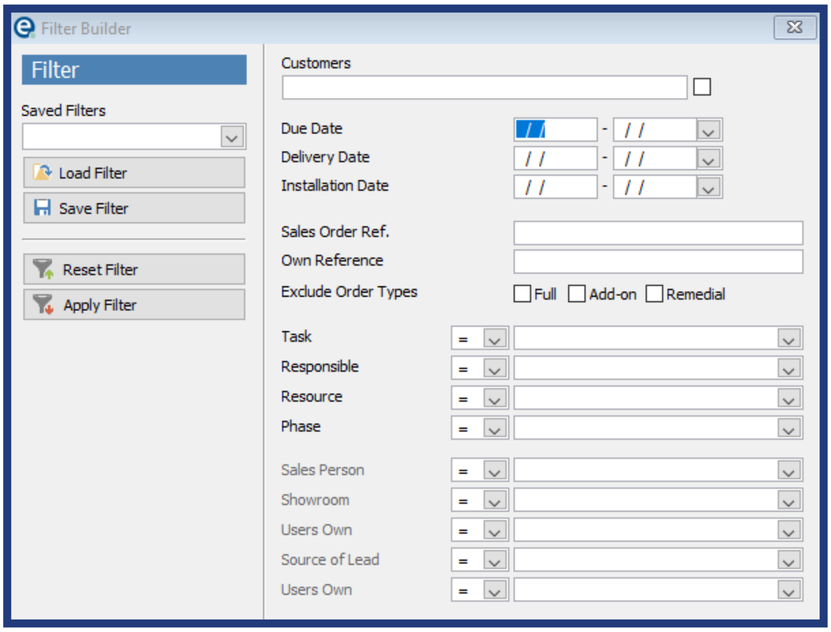
Projects > Workflow Window



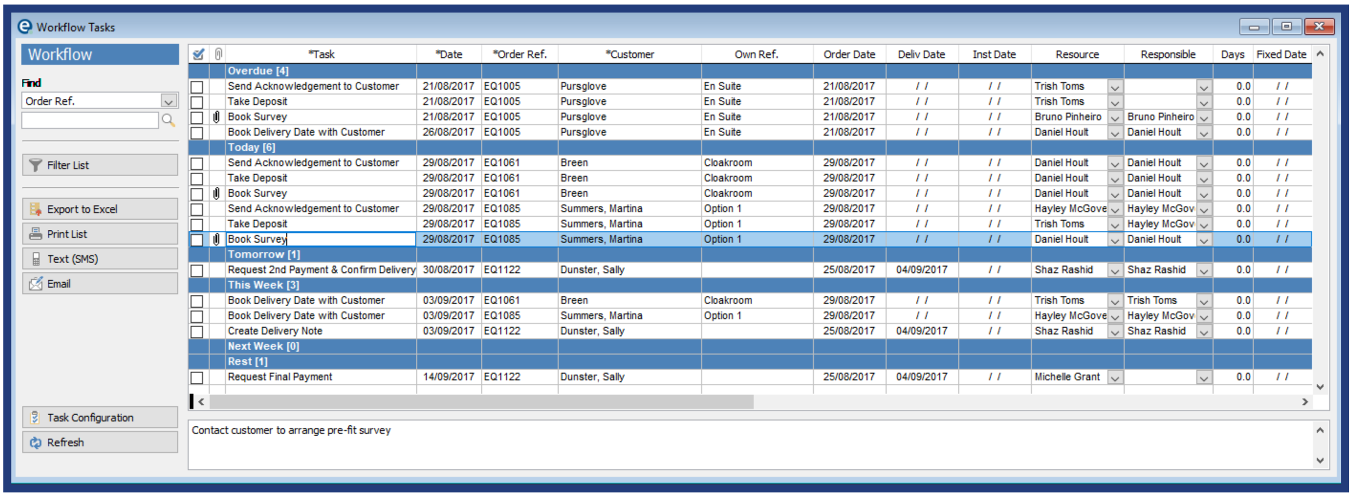
This window allows you to view all outstanding tasks for all orders. It is organised to show Overdue tasks at the top, then tasks due Today, Tomorrow, This Week, Next Week and the Rest.



Use the Filter List button to only show tasks that are relevant to you.



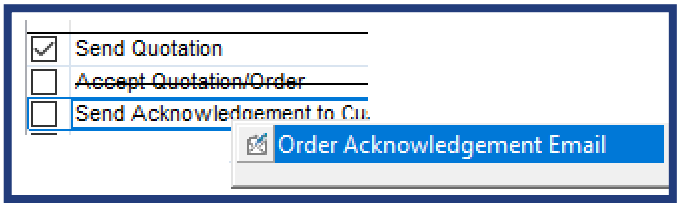
You can manually complete tasks by ticking them off on the left hand side. Some tasks will have email/text or word processor templates attached to them. Right click on a task's description to find out if it has a template attached to it. Select the template and send to the customer to complete the task.



Completing Tasks

Once you have identified a task to be completed, there may be 2 methods of marking the task as complete.

1) You can manually complete a task by clicking it in the tick box to the left of the description.
2) Tasks can be configured to automatically complete when an email, text or letter template has been created and sent to the customer. Right click on a task description to see if it has any linked templates. Once you have sent the relevant template, the task will automatically complete

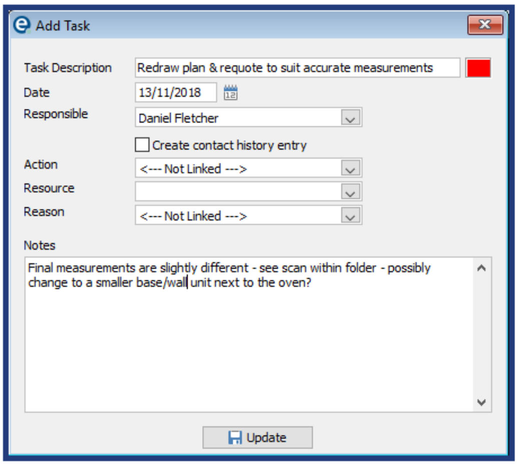


Adding Manual Tasks

You may wish to manually add a task for an order where something is very specific to that order, for example, if the pre-fit survey has been completed but the design needs changing as a result.

Open the Task Manager window for the order you wish to manually add a task in for.

Click Add on the toolbar to open the following window:



Type a description for the task and click in the box to the right to assign a colour.

You can choose a different date (the task will automatically have today's date set) by clicking the calendar icon.

Select a responsible user, and tick if you wish to create a communication event linked to this task. You will only need to assign an action, resource and reason of you are creating a communication event.

Type some notes in the box to give more detail about your task, and click **Update.**

You will now see the manually added task on within the Task Manager window in green text to denote that it is a manually added task.

As long as you have set a responsible user, this task will appear on the relevant User's Desktop Task List.

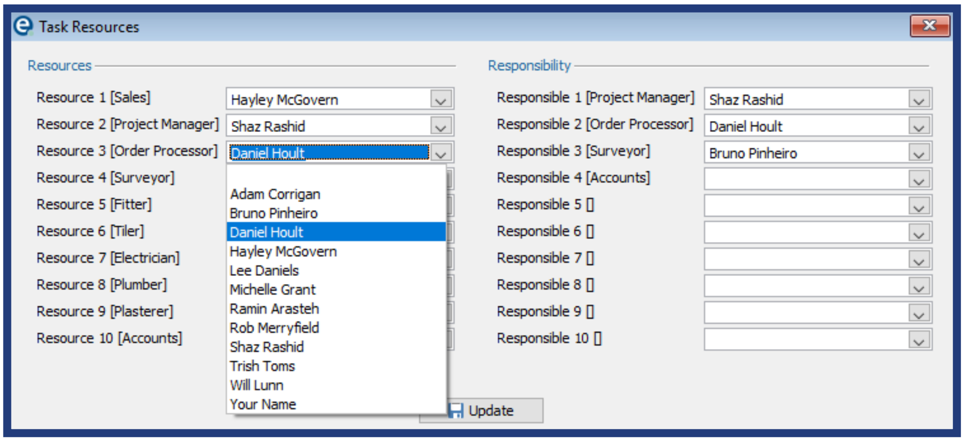
Hints & Tips

You can manually override the responsible user/resource against individual tasks by clicking the relevant drop down and selecting from the list. This can be done from the Task Manager window and from the Projects > Workflow window.

Assigning Resources / Responsibles

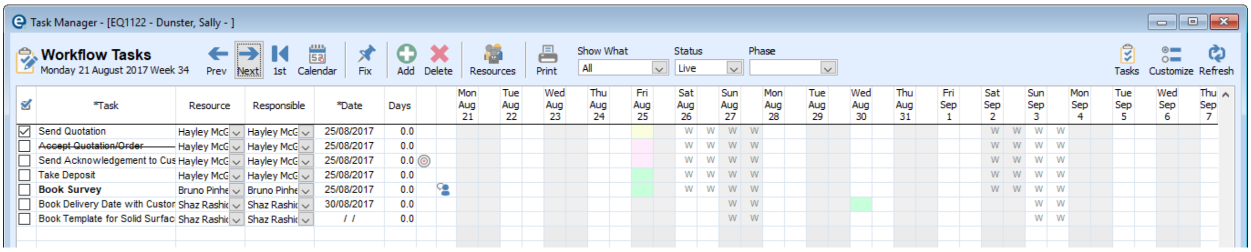
Open the Orders Task List Click the Resources button at the top.

This will open the following window.

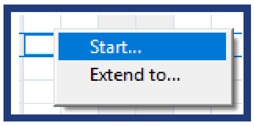


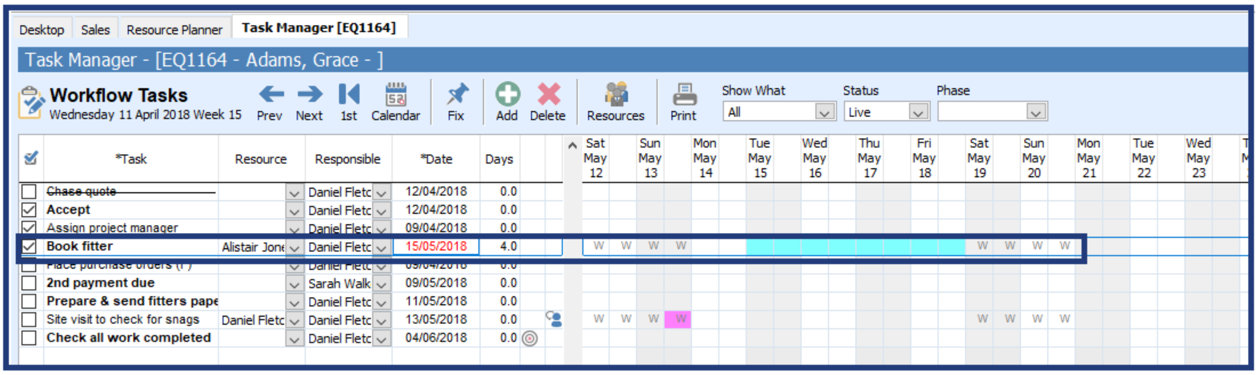
Work your way down the list of default Resources, and default Responsibles, to assign the relevant tasks for the job.

Click update once you have finished to return to the previous window.
You should now see that all tasks have Resources and Responsibles set against them.



Within this window, you can also right click on a date within the time line and select “Start”, and then right click in a later date and select “Extend to...” if you would like to see a gant chart of when events are occurring (such as fitting). You may notice the Date turns red: this is to denote that the date has been manually overridden. You can double click on any date against a task to manually override it, or you can right click on it to lock the date so that it doesn’t recalculate. Any manual dates will automatically be locked.





Hints & Tips

The first step to using Workflow is to ensure all tasks are assigned to Responsible users. This could even be set as a Workflow task.

Implementing Workflow on your own system

Now that you have an idea of how to configure the Workflow module, you are going to need to configure this on your own system. You can do this in 1 of 2 ways:

1) Create a small number of tasks, ensure you and your colleagues are happy with them, and then gradually add more tasks, or
2) Book a day out of your diary to configure the entire Workflow Module

- Think about areas of the system that you may wish to refresh yourself on (see F1 or Online Help)
- Think about areas of the system that your team members may need training on, or areas where elements might change once you begin to configure the module (for example, milestones, filters, templates)
- Compile a basic list of order processes from start to finish. Think about the following elements for each task:
    - When is it due?
    - Does it need to complete a milestone?
    - Whose responsibility is it?
    - Does it need a resource?
    - Which phase of the job is it?
    - Does it need a contact history event?
    - Does it need any further explanation?
    - Under which circumstances is this task relevant?
    - How do you plan on completing the task?
- Within EQ:
    - Ensure all users and relevant resources are configured within EQ
    - Configure each task, as we have today, testing as you go along
    - Make a note of any intrinsic changes you make to the system as you go along to assist other users (Customer Types, Quotation types, Quotation/Order Statuses, Milestones)
    - Create an Archive database if you haven't got one already, to move old/dummy orders into
    - Consider setting the Workflow status of existing/ongoing orders to Complete

Whichever method you choose to utilise to configure your Workflow module, please be aware that old/existing orders will generate tasks as you process them, which may have already been completed prior to the implementation of Workflow. You can set the Workflow Status (see page 36) of these orders as locked (so existing tasks still remain as "outstanding" but no new tasks are created), you could set them to Complete (so that all outstanding tasks are completed and no new tasks are created), or you could tick off the "old" tasks as you see them appear. They will eventually phase themselves out.