Getting Started Manual

For TreezSoft Job Order

Jan 2013

For information about customer support, please visit our homepage at
http://www.treezsoft.com on the World Wide Web.

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![TreezSoft logo]

Step 1: How to Subscribe to Job Order
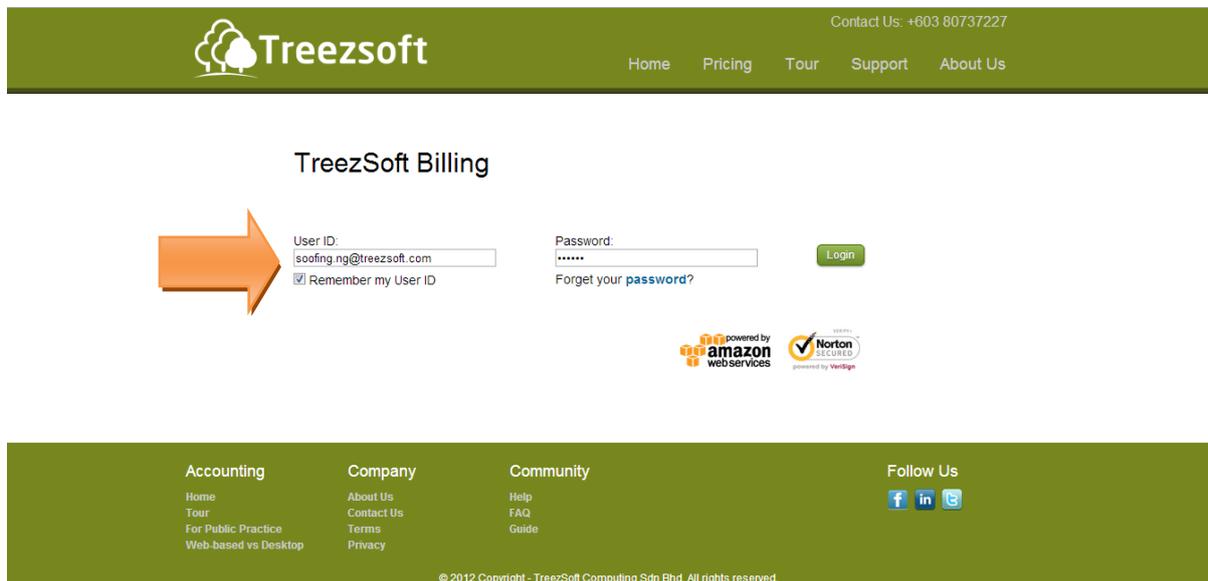
To subscribe for TreezSoft Job Order system, **go to TreezSoft Billing** (https://billing.treezsoft.com/). Enter your User ID & Password (The email & password when you created your account)
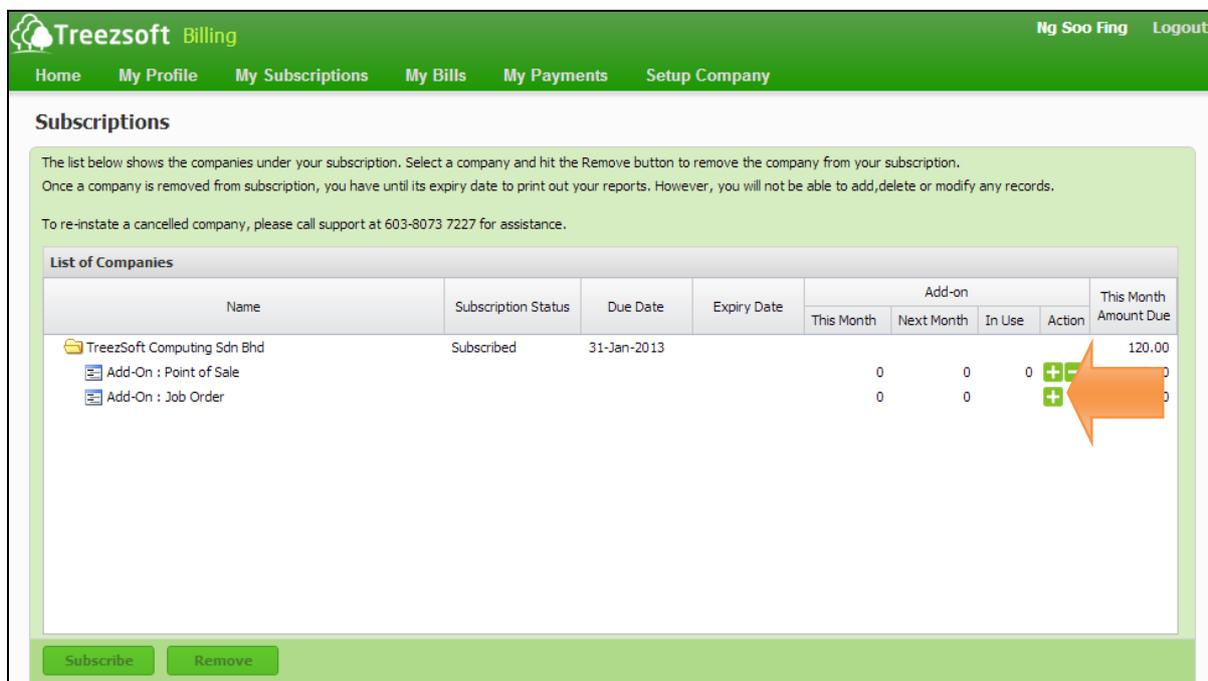
Step 1) Look for the Company you want to subscribe for Job Order system.

Step 2) Click on ➕ icon to add a license. Done!

Step 2: First Time Login

You have completed step 1. Now, logging into TreezSoft Job Order for the first time you will need to configure some accounting settings so the Job Order will be operating smoothly. Hence, you are required to login using your administrative ID (the email address you used to register TreezSoft Accounting with)

Then, please login to https://accounting.treezsoft.com/job, enter your ID & password.

Now you have logged into TreezSoft Job Order. The illustrated image is the main screen the system will direct you to.

Job Order Dashboard

This is the Dashboard. The left panel shows you the calendar which allows you to view your job order lists in specific Day view. You can be more specific by picking the Location or Status to filter your job order lists.

New Job Order button will direct you to the job order creation page. Alternatively, you can click on Job Orders (on the top, next to the Dashboard button) to create a new job order.

In the highlighted area by the orange ring:

Day: Select this option to view a specific DAY's job order lists.

Week: Select this option to view a specific WEEK's job order lists.

Month: Select this option to view a specific MONTH's job order lists.

You are now close to creating your first job order document, voila!

Voilà! You are now close to creating your first job order! But, remember… you are required to configure your setting first then only able to do so.

Reason why:

The reason why you should configure your setting before creating a job order is simply <u>because all applications in TreezSoft are integrated</u>. You can generate bills to your customers from job Order itself.

Here's how you should configure your setting…

Settings

Step A) Go to Settings → Users

A.1) List of Users
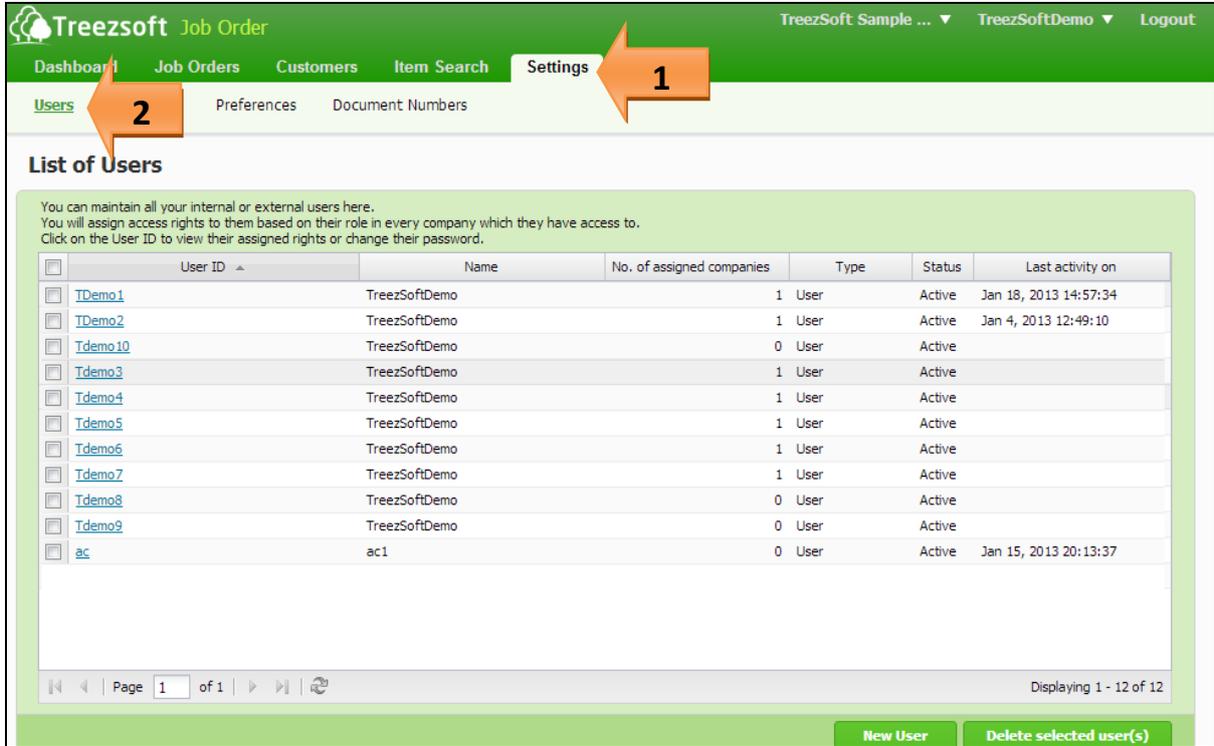
List of Users screen will display all the users you have created in TreezSoft.

Click on **New User** (near the bottom) to setup a new user:

1. If you want to edit a user, click on the hyperlinked username.

2. To delete user(s), tick on the checkbox next to him and then click **Delete selected user(s)**.

    This action is irreversible so please consider carefully.

A.2) Manage User Details / Create User
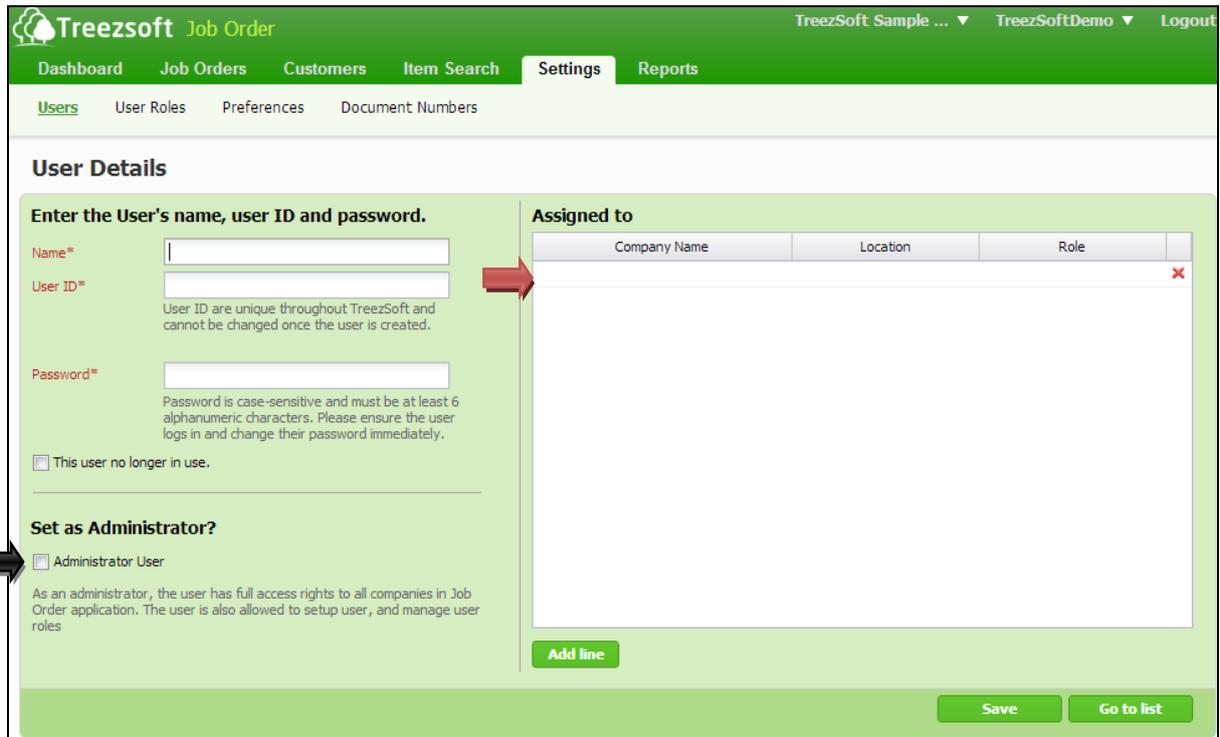
1. Enter the desired name, user ID and password into the particular fields. Fields mark with asterisk (*) are required fields.

2. Assign the user to the specific company and his roles on the right section (As illustrated with the red arrow).

3. If you want to assign more than one company to the user, click Add line to add additional companies to him.

4. If you want to assign the user as administrator of TreezSoft Job Order, tick the checkbox which is below of the "**Set as Administrator?**" (As illustrated with the black arrow).

5. Click on **Save** to confirm your action.

Step B) Go to Settings → User Roles

B.1) Manage User Roles

After setting up users, you shall then proceed to manage the user roles. As illustrated above is the list of User Roles defaulted by the system. It will also display other user roles you have created in TreezSoft Job Order. (Be noted that all copy(s) of your TreezSoft Job Order will share the same user roles. Redefining new roles are not required.)

1. Click on **New User** Role to setup a user role.

2. If you want to edit an existing user role, click on the hyperlinked user role type.

3. To delete user role(s), tick on the checkbox next to it and then click **Delete selected role(s)**.

   Deleting a user role is irreversible so please consider carefully.

B.2) Creating New User Role
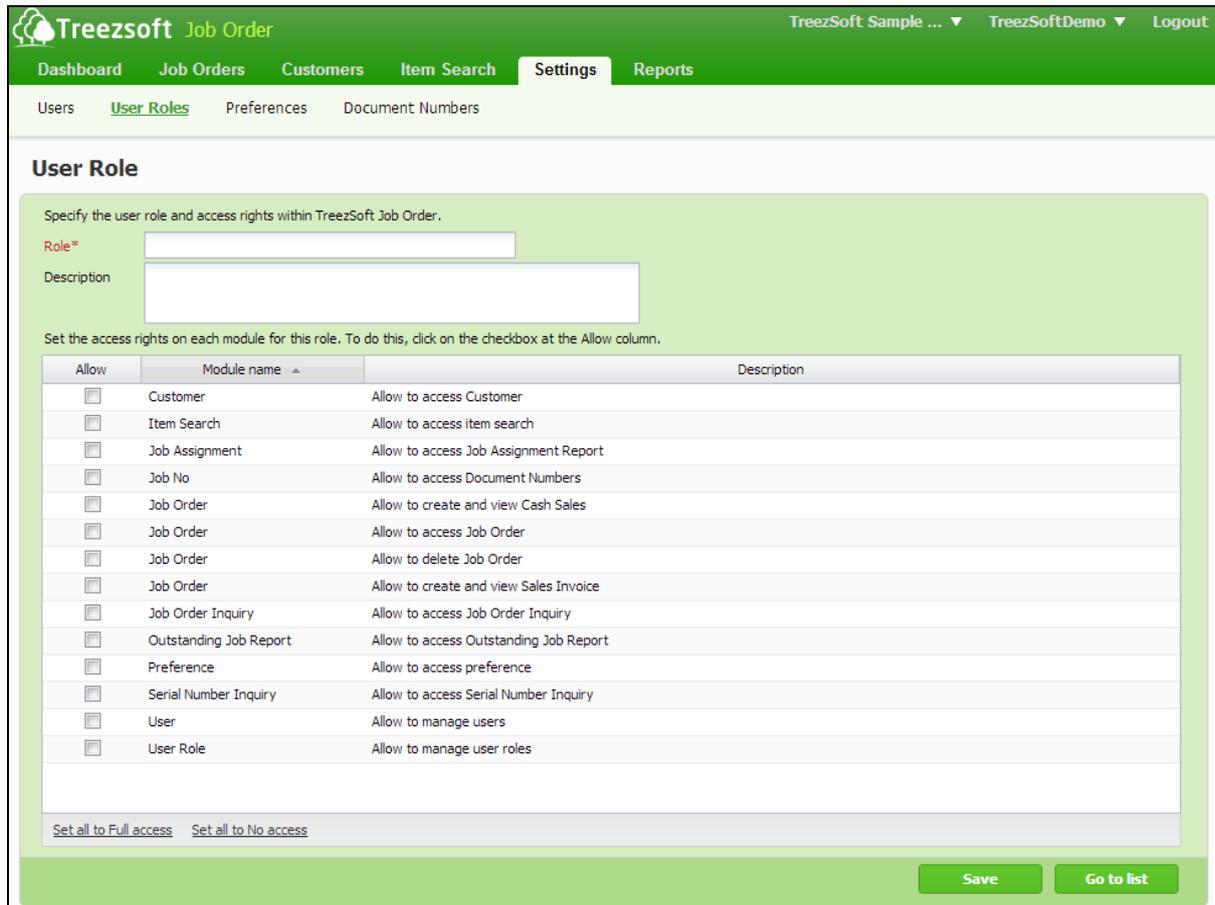
1. Enter the desired Role name and description. Field(s) mark with asterisk (*) is required field.

2. To set access rights on each module for the role, tick the checkbox at the Allow column. (As illustrated with the red arrow)

3. To set either full access or no access to the role, click on the hyperlinked text. (As illustrated with the black arrow)

4. Click on **Save** to confirm your selections.

Step C) Go to Settings → Preferences

Step C.1)

The settings that you need to configure in Preferences are easy.

In the highlighted area by the orange ring:

Business Type: Two types of businesses can be selected

    i)   General and;

    ii)   Electronic Service & Repair

Please select option (ii) if your business falls under electronic devices servicing & repairing (such as notebook repairing, mobile phone repairing & more).

Other businesses which do not fall under this category, please select option (i)

Step C.2) Payment Terms

Next, you are required to set the matching accounts in the **Payment Terms** section. All transactions in TreezSoft applications are integrated and account-linked. Hence the settings are required to be configured in this way.

Step C.3) Job Order Status

Job Order status section allows you to configure the defaulted status naming, define new status type, and highlight status with color to make it recognisable and rearranging the status sequences.

Step D) Document Numbers
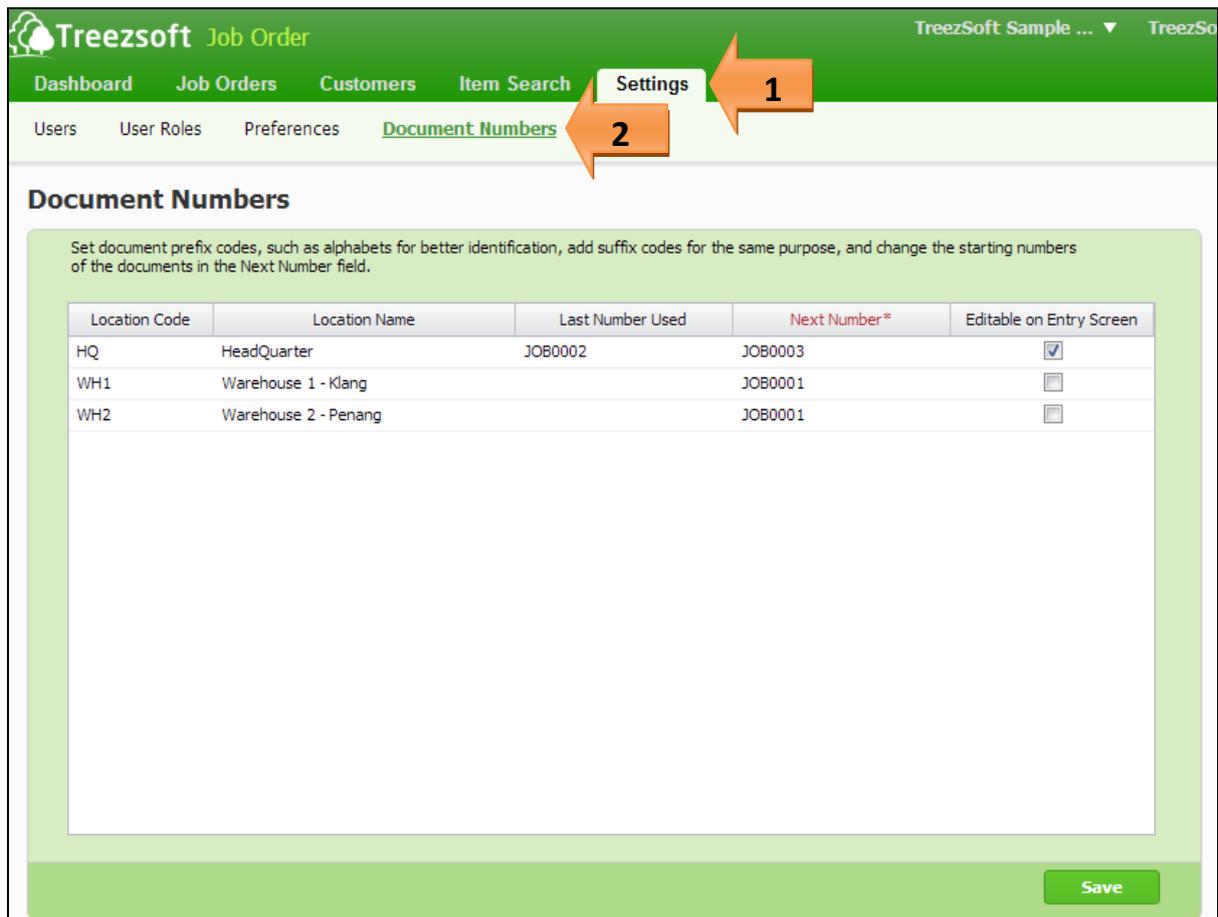
Document numbers settings allow you to set your own sets of numbers other than system defaulted.

You can also determine if the document numbers are editable on entry screen by checking on the checkbox; otherwise just leave the settings as preset.

Click **Save** after you have confirmed your action.

Step 3: Nearly Finish!

Now, you have actually finished setting up what is necessary to get yourself start using TreezSoft Job Order. The rest of the manual will show guides to create a job order.

Job Order Inquiry

Job Order Inquiry illustrates the list of job orders you have entered. The criteria to view the list of job orders are based on the **date range** entered by you.

1. To create a job order, click on New Job Order.

2. To delete a record, select the record and click on Delete Selected record(s).

3. To view a previous record, click on the hyperlinked Job No.

   Deleting a record is irreversible so please consider carefully.

Job Order Entry Screen – Job Details

A) Below illustrates the sample Job Order screen with **General** business type selected:

Please be noted that fields with asterisks (*) are required fields.

Status: Three types of status can be selected

i) **Open**: The job is just created

ii) **Completed**: If job is completed, select this option and system will allow you to generate bill for your customer.

iii) **Closed**: If job is completed and bill has been issued, select this to close the job.

(If the job is a warranty job and will not issue bills, you select Closed right after you have done the job.)

After you have saved the job record, you can print the job order **Check-in Receipt** and issue to your customer.

B) Below illustrates the sample Job Order screen with **Electronics Service & Repair** business type selected:

The interface has slight difference as it is specifically designed for **Electronic Service & Repair** businesses.

Job Order Entry Screen – Service & Repair

Service & Repair screen allows you to enter the tasks and actions performed for the job. The types of job performances are definable manually.

The section at the below allows you to select the item used for the job. The item selected will automatically be deducted from your inventories once you confirmed the stock issuance by issuing a sales invoice or cash sales to your customer.

Job Order Entry Screen – Job Estimate

Job estimate allows you to prepare a quotation for your customer to show him the charges for the job request he makes.

You can print the job estimate by clicking on **Print Estimate** (at the bottom left).

Job Order Entry Screen – Activity Log

Activity log allows you to keep track of the actions performed by your technical engineers.