



Getting Started Manual

For TreezSoft Job Order

Jan 2013

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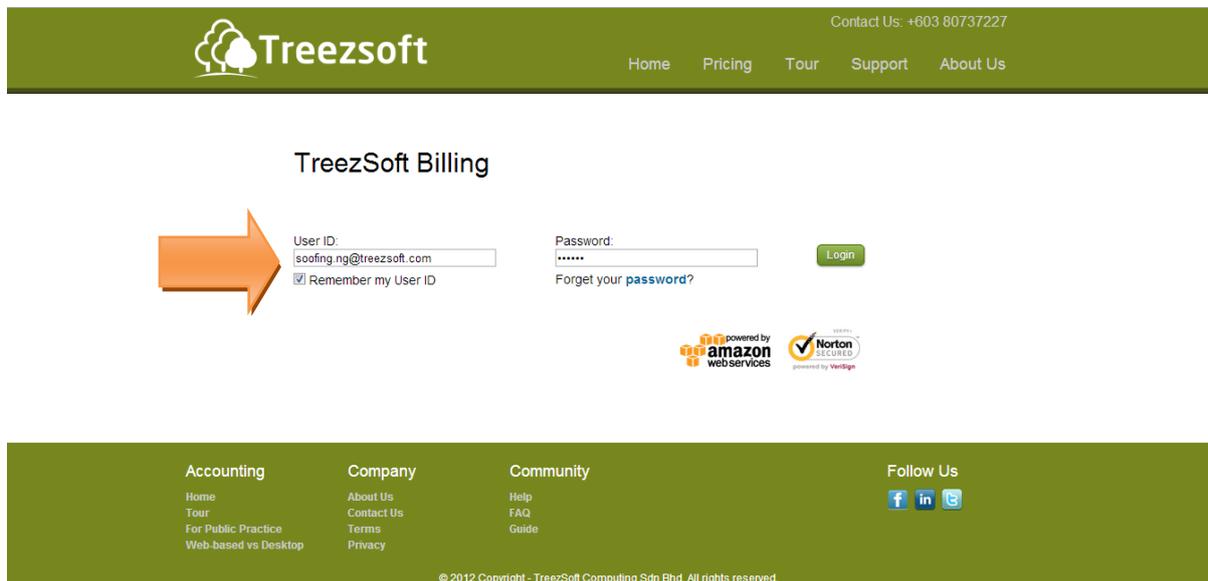
For information about customer support, please visit our homepage at <http://www.treezsoft.com> on the World Wide Web.

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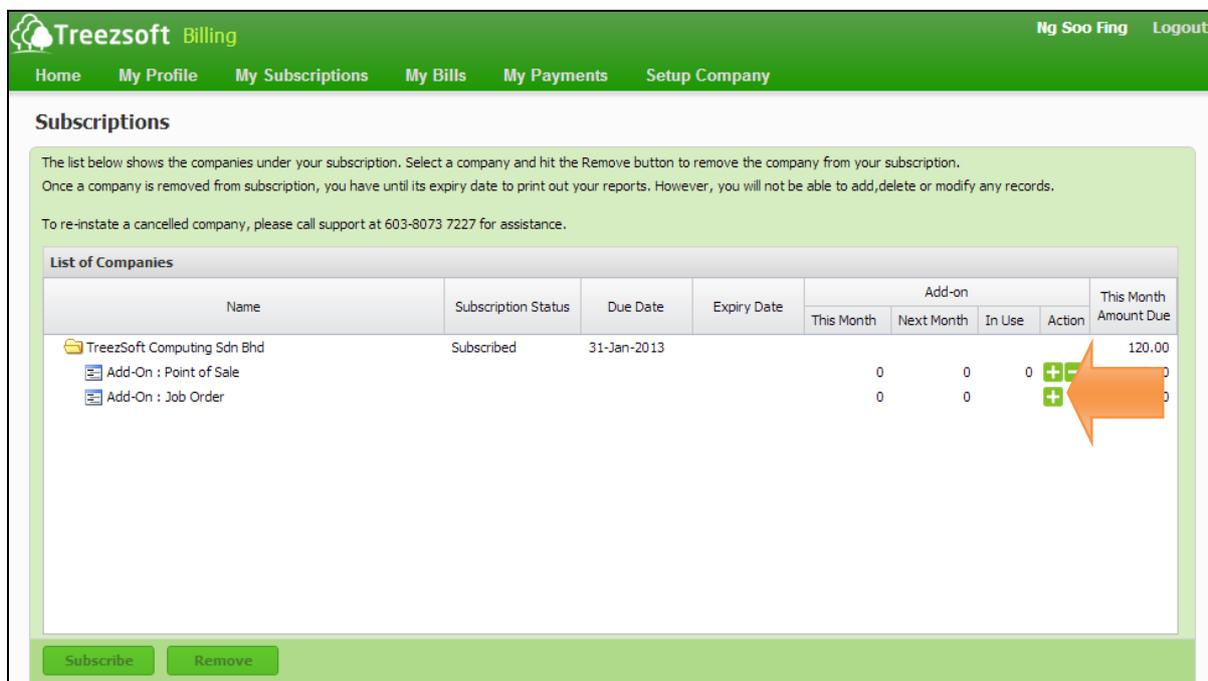
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Step 1: How to Subscribe to Job Order



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!

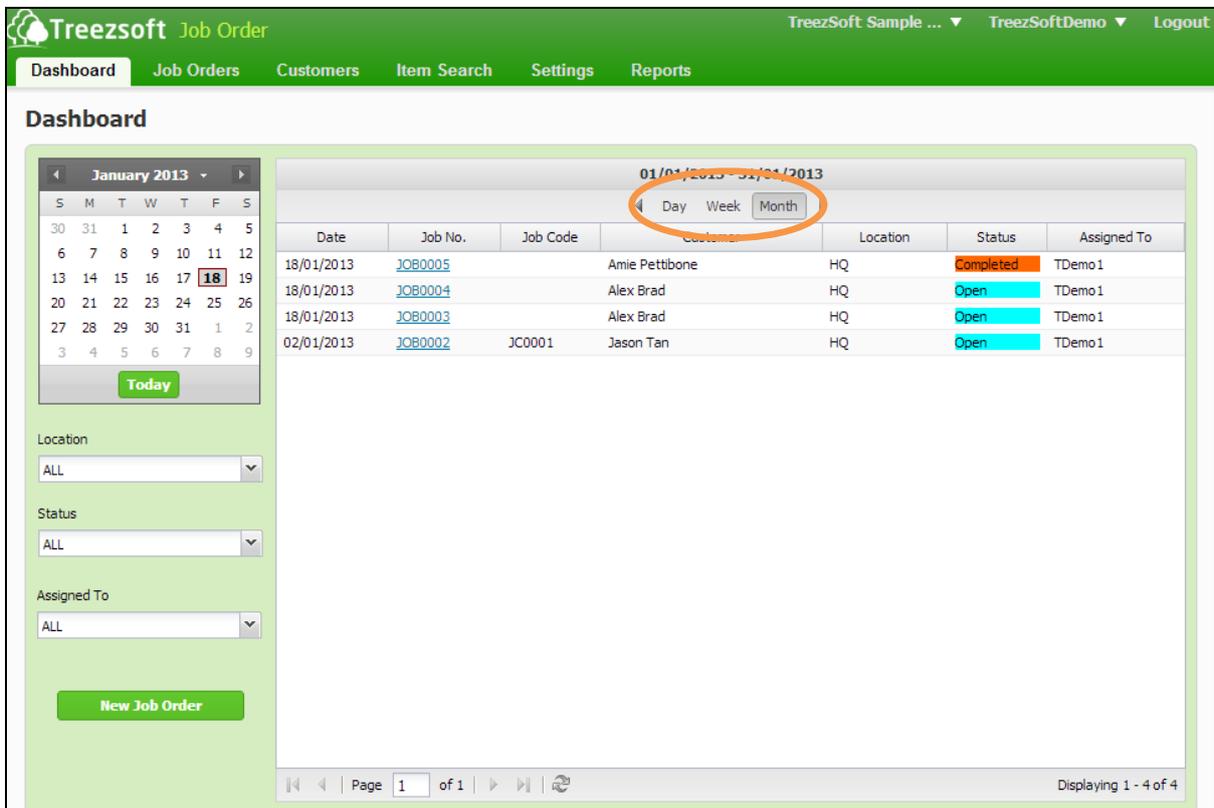
Step 2: First Time Login

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



Treezsoft Job Order TreezSoft Sample ... TreezSoftDemo Logout

Dashboard Job Orders Customers Item Search Settings Reports

Dashboard

January 2013

01/01/2013 - 01/01/2013

Day Week **Month**

Date	Job No.	Job Code	Customer	Location	Status	Assigned To
18/01/2013	JOB0005		Amie Pettbone	HQ	Completed	TDemo1
18/01/2013	JOB0004		Alex Brad	HQ	Open	TDemo1
18/01/2013	JOB0003		Alex Brad	HQ	Open	TDemo1
02/01/2013	JOB0002	JC0001	Jason Tan	HQ	Open	TDemo1

Location: ALL

Status: ALL

Assigned To: ALL

New Job Order

Page 1 of 1 | Displaying 1 - 4 of 4

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:

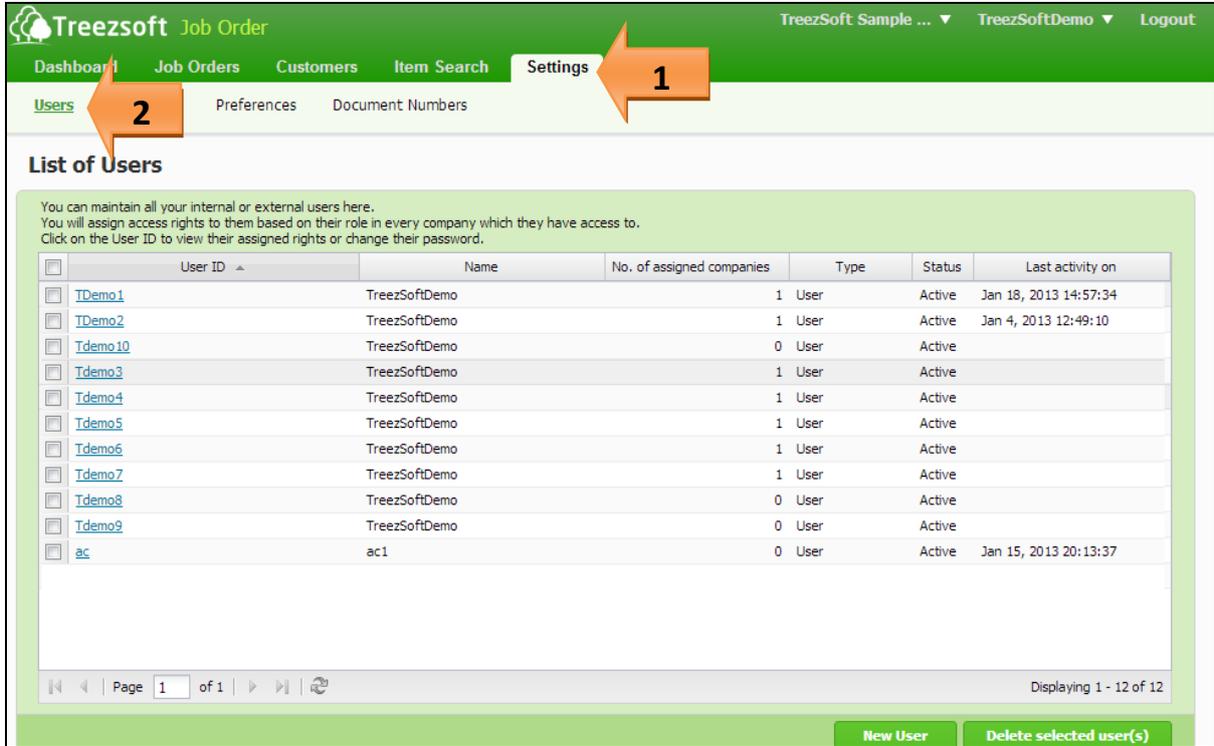
The reason why you should configure your setting before creating a job order is simply because all applications in TreezSoft are integrated. You can generate bills to your customers from job Order itself.

Here's how you should configure your setting...

Settings

Step A) Go to Settings → Users

A.1) List of Users



The screenshot shows the TreezSoft interface. The top navigation bar includes 'Dashboard', 'Job Orders', 'Customers', 'Item Search', and 'Settings' (highlighted with an orange arrow labeled '1'). Below this, there are sub-menus: 'Users' (highlighted with an orange arrow labeled '2'), 'Preferences', and 'Document Numbers'. The main content area is titled 'List of Users' and contains a table of users. The table has columns for 'User ID', 'Name', 'No. of assigned companies', 'Type', 'Status', and 'Last activity on'. The users listed are Tdemo1 through Tdemo9 and ac. At the bottom of the table, there are two buttons: 'New User' and 'Delete selected user(s)'. The footer shows 'Page 1 of 1' and 'Displaying 1 - 12 of 12'.

<input type="checkbox"/>	User ID	Name	No. of assigned companies	Type	Status	Last activity on
<input type="checkbox"/>	Tdemo1	TreezSoftDemo	1	User	Active	Jan 18, 2013 14:57:34
<input type="checkbox"/>	Tdemo2	TreezSoftDemo	1	User	Active	Jan 4, 2013 12:49:10
<input type="checkbox"/>	Tdemo10	TreezSoftDemo	0	User	Active	
<input type="checkbox"/>	Tdemo3	TreezSoftDemo	1	User	Active	
<input type="checkbox"/>	Tdemo4	TreezSoftDemo	1	User	Active	
<input type="checkbox"/>	Tdemo5	TreezSoftDemo	1	User	Active	
<input type="checkbox"/>	Tdemo6	TreezSoftDemo	1	User	Active	
<input type="checkbox"/>	Tdemo7	TreezSoftDemo	1	User	Active	
<input type="checkbox"/>	Tdemo8	TreezSoftDemo	0	User	Active	
<input type="checkbox"/>	Tdemo9	TreezSoftDemo	0	User	Active	
<input type="checkbox"/>	ac	ac1	0	User	Active	Jan 15, 2013 20:13:37

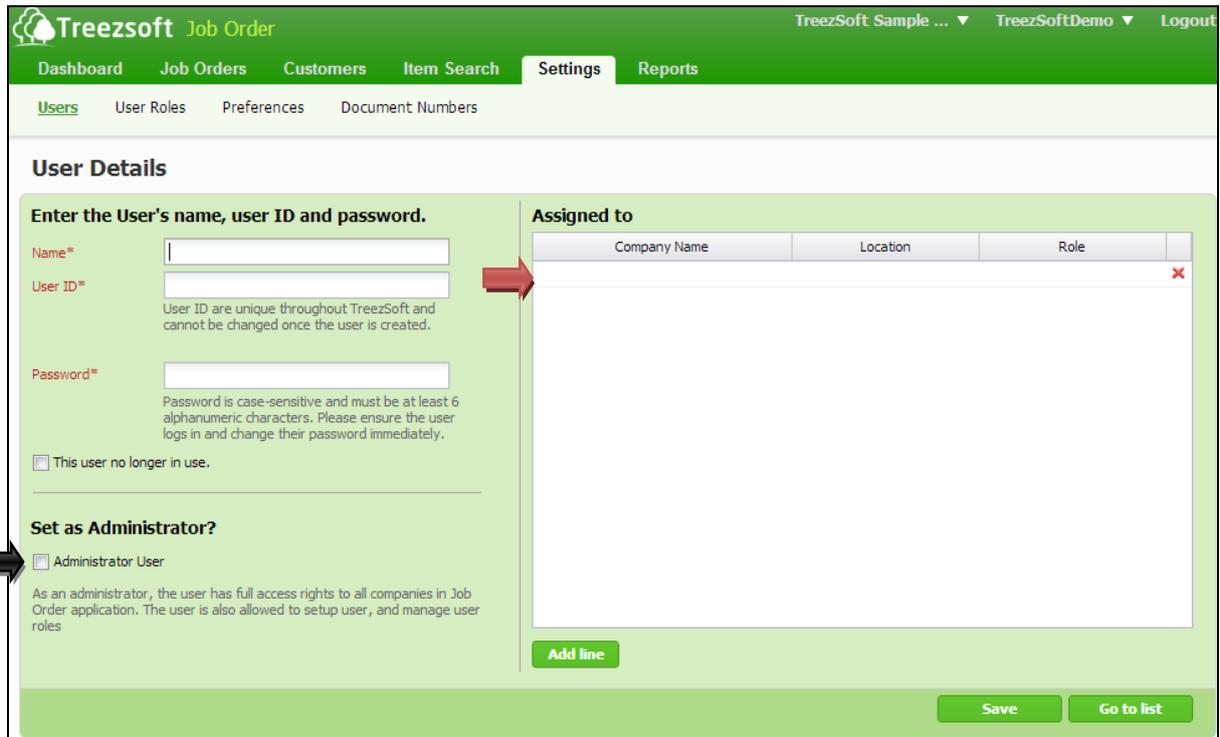
List of Users screen will display all the users you have created in TreezSoft.

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



User Details

Enter the User's name, user ID and password.

Name*

User ID*
User ID are unique throughout TreezSoft and cannot be changed once the user is created.

Password*
Password is case-sensitive and must be at least 6 alphanumeric characters. Please ensure the user logs in and change their password immediately.

This user no longer in use.

Set as Administrator?

Administrator User
As an administrator, the user has full access rights to all companies in Job Order application. The user is also allowed to setup user, and manage user roles

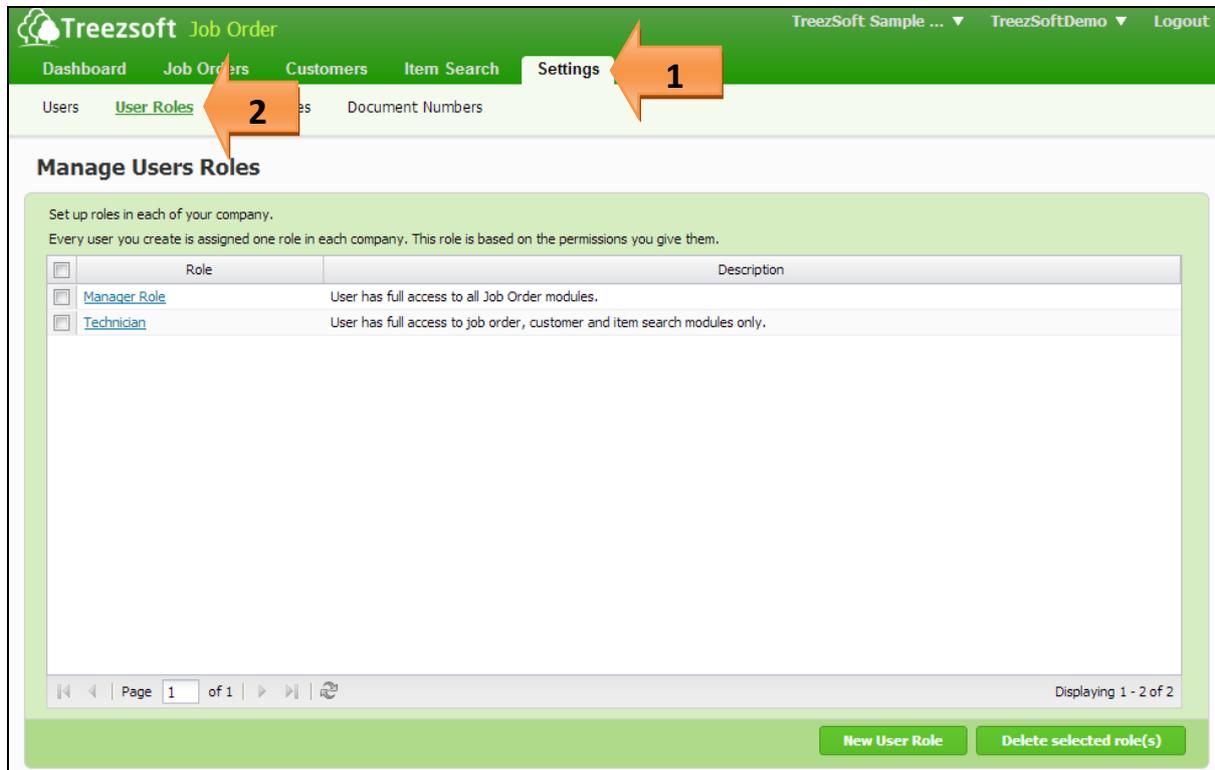
Assigned to

Company Name	Location	Role

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



The screenshot displays the 'Manage Users Roles' interface. The top navigation bar includes 'Dashboard', 'Job Orders', 'Customers', 'Item Search', and 'Settings' (indicated by arrow 1). Below this, a sub-menu shows 'Users', 'User Roles' (indicated by arrow 2), 'Roles', and 'Document Numbers'. The main content area is titled 'Manage Users Roles' and contains the following text:

Set up roles in each of your company.
Every user you create is assigned one role in each company. This role is based on the permissions you give them.

<input type="checkbox"/>	Role	Description
<input type="checkbox"/>	Manager Role	User has full access to all Job Order modules.
<input type="checkbox"/>	Technician	User has full access to job order, customer and item search modules only.

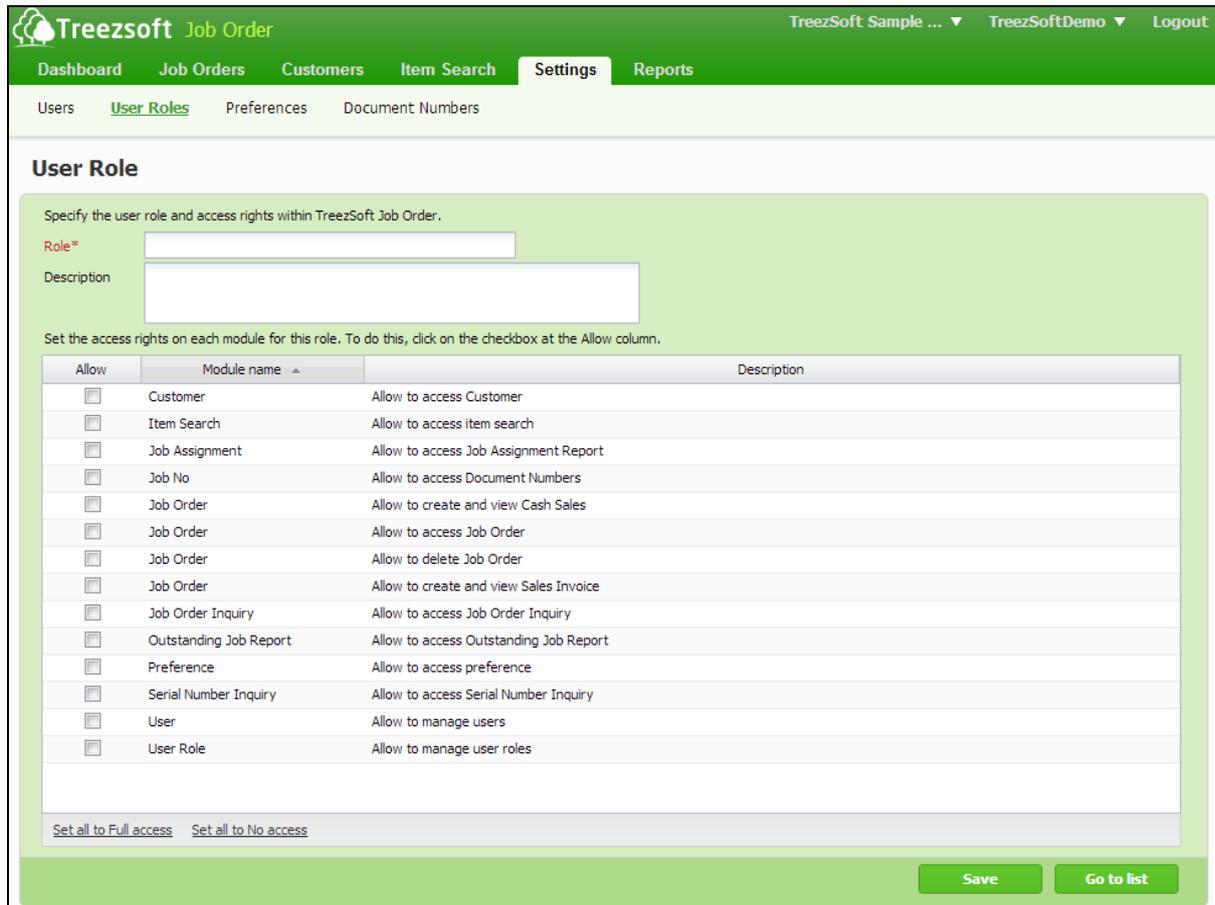
At the bottom of the page, there are two buttons: 'New User Role' and 'Delete selected role(s)'. A footer indicates 'Page 1 of 1' and 'Displaying 1 - 2 of 2'.

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



Treezsoft Job Order TreezSoft Sample ... TreezSoftDemo Logout

Dashboard Job Orders Customers Item Search **Settings** Reports

Users User Roles Preferences Document Numbers

User Role

Specify the user role and access rights within TreezSoft Job Order.

Role*

Description

Set the access rights on each module for this role. To do this, click on the checkbox at the Allow column.

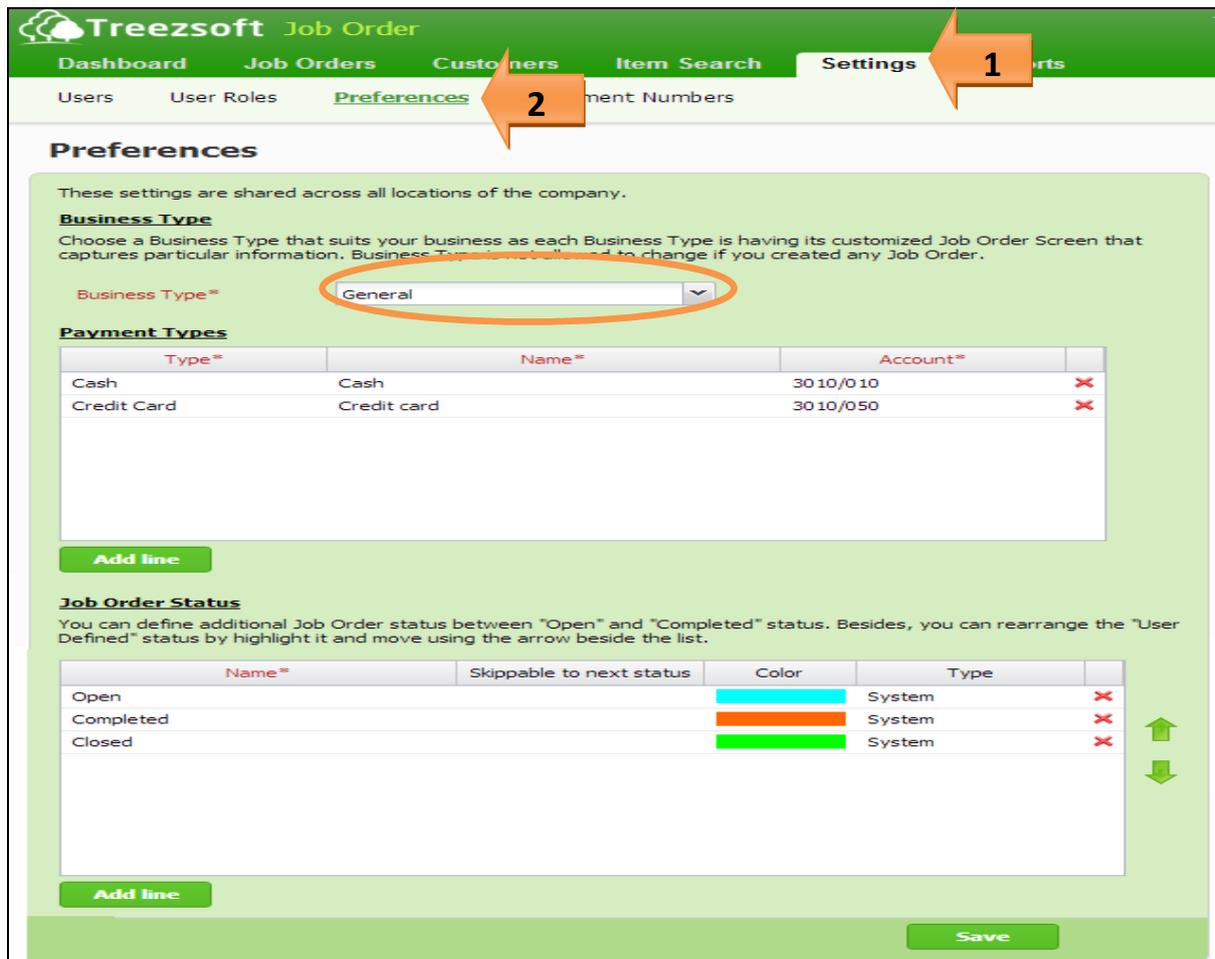
Allow	Module name ▲	Description
<input type="checkbox"/>	Customer	Allow to access Customer
<input type="checkbox"/>	Item Search	Allow to access item search
<input type="checkbox"/>	Job Assignment	Allow to access Job Assignment Report
<input type="checkbox"/>	Job No	Allow to access Document Numbers
<input type="checkbox"/>	Job Order	Allow to create and view Cash Sales
<input type="checkbox"/>	Job Order	Allow to access Job Order
<input type="checkbox"/>	Job Order	Allow to delete Job Order
<input type="checkbox"/>	Job Order	Allow to create and view Sales Invoice
<input type="checkbox"/>	Job Order Inquiry	Allow to access Job Order Inquiry
<input type="checkbox"/>	Outstanding Job Report	Allow to access Outstanding Job Report
<input type="checkbox"/>	Preference	Allow to access preference
<input type="checkbox"/>	Serial Number Inquiry	Allow to access Serial Number Inquiry
<input type="checkbox"/>	User	Allow to manage users
<input type="checkbox"/>	User Role	Allow to manage user roles

[Set all to Full access](#) [Set all to No access](#)

Save **Go to list**

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



These settings are shared across all locations of the company.

Business Type
Choose a Business Type that suits your business as each Business Type is having its customized Job Order Screen that captures particular information. Business Type is not allowed to change if you created any Job Order.

Business Type* General

Payment Types

Type*	Name*	Account*	
Cash	Cash	30 10/0 10	X
Credit Card	Credit card	30 10/050	X

Job Order Status
You can define additional Job Order status between "Open" and "Completed" status. Besides, you can rearrange the "User Defined" status by highlight it and move using the arrow beside the list.

Name*	Skippable to next status	Color	Type	
Open			System	X
Completed			System	X
Closed			System	X

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)

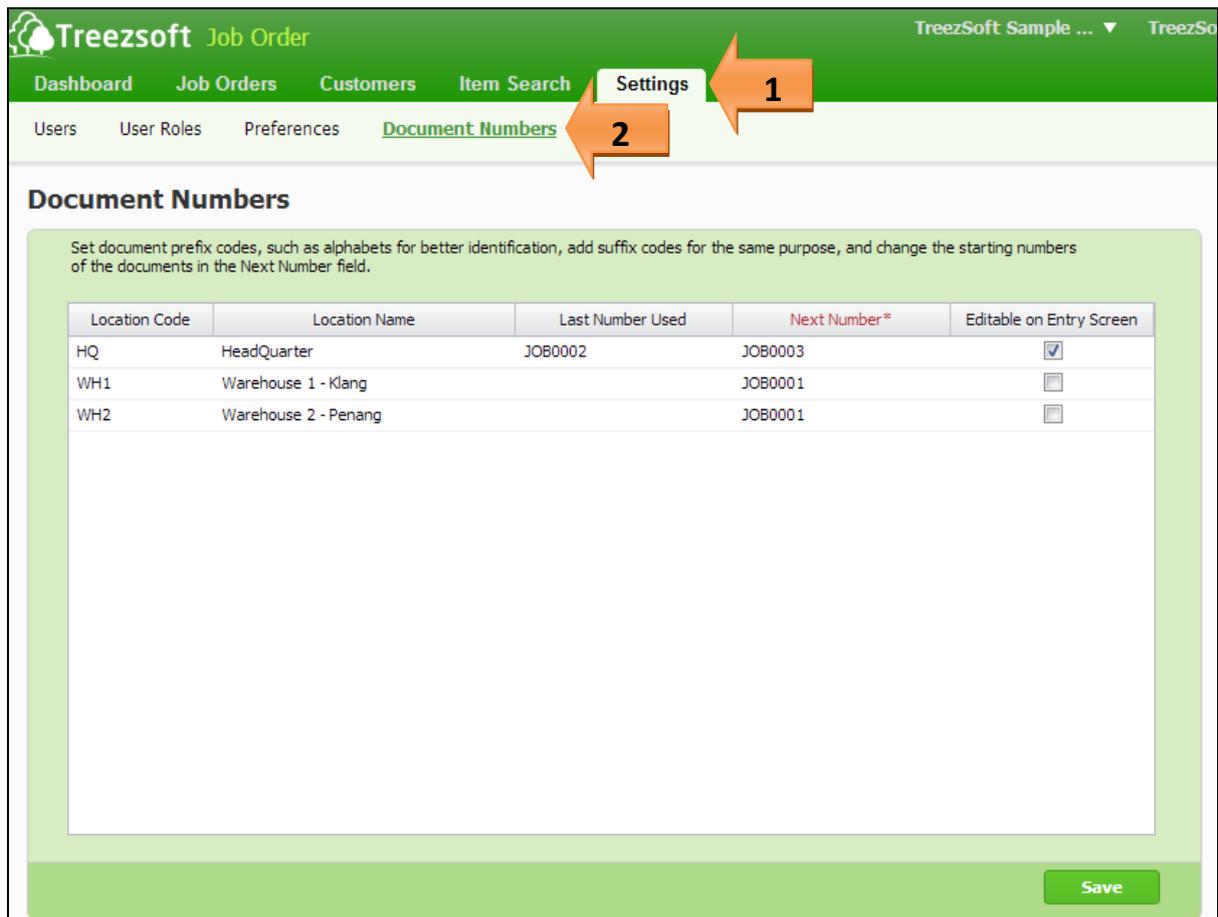
Step C.2) Payment Terms

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



Set document prefix codes, such as alphabets for better identification, add suffix codes for the same purpose, and change the starting numbers of the documents in the Next Number field.

Location Code	Location Name	Last Number Used	Next Number*	Editable on Entry Screen
HQ	HeadQuarter	JOB0002	JOB0003	<input checked="" type="checkbox"/>
WH1	Warehouse 1 - Klang		JOB0001	<input type="checkbox"/>
WH2	Warehouse 2 - Penang		JOB0001	<input type="checkbox"/>

Save

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

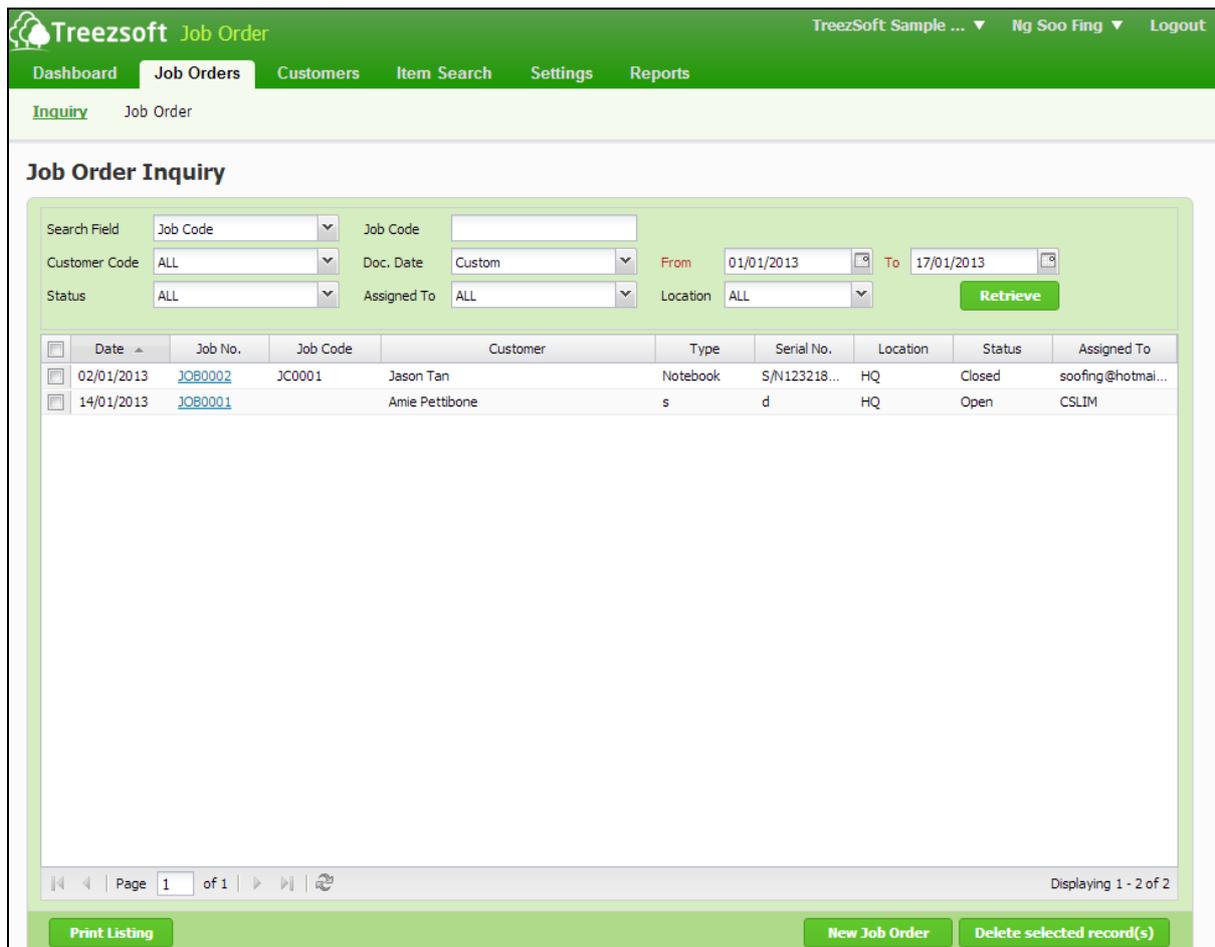
You can also determine if the document numbers are editable on entry screen by checking on the checkbox; otherwise just leave the settings as preset.

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

Search Field: Job Code [dropdown] Job Code: [input]
 Customer Code: ALL [dropdown] Doc. Date: Custom [dropdown] From: 01/01/2013 [calendar] To: 17/01/2013 [calendar]
 Status: ALL [dropdown] Assigned To: ALL [dropdown] Location: ALL [dropdown] **Retrieve**

Date	Job No.	Job Code	Customer	Type	Serial No.	Location	Status	Assigned To
02/01/2013	JOB0002	JC0001	Jason Tan	Notebook	S/N123218...	HQ	Closed	soofing@hotmail...
14/01/2013	JOB0001		Amie Pettibone	s	d	HQ	Open	CSLIM

Page 1 of 1 | Displaying 1 - 2 of 2

Print Listing **New Job Order** **Delete selected record(s)**

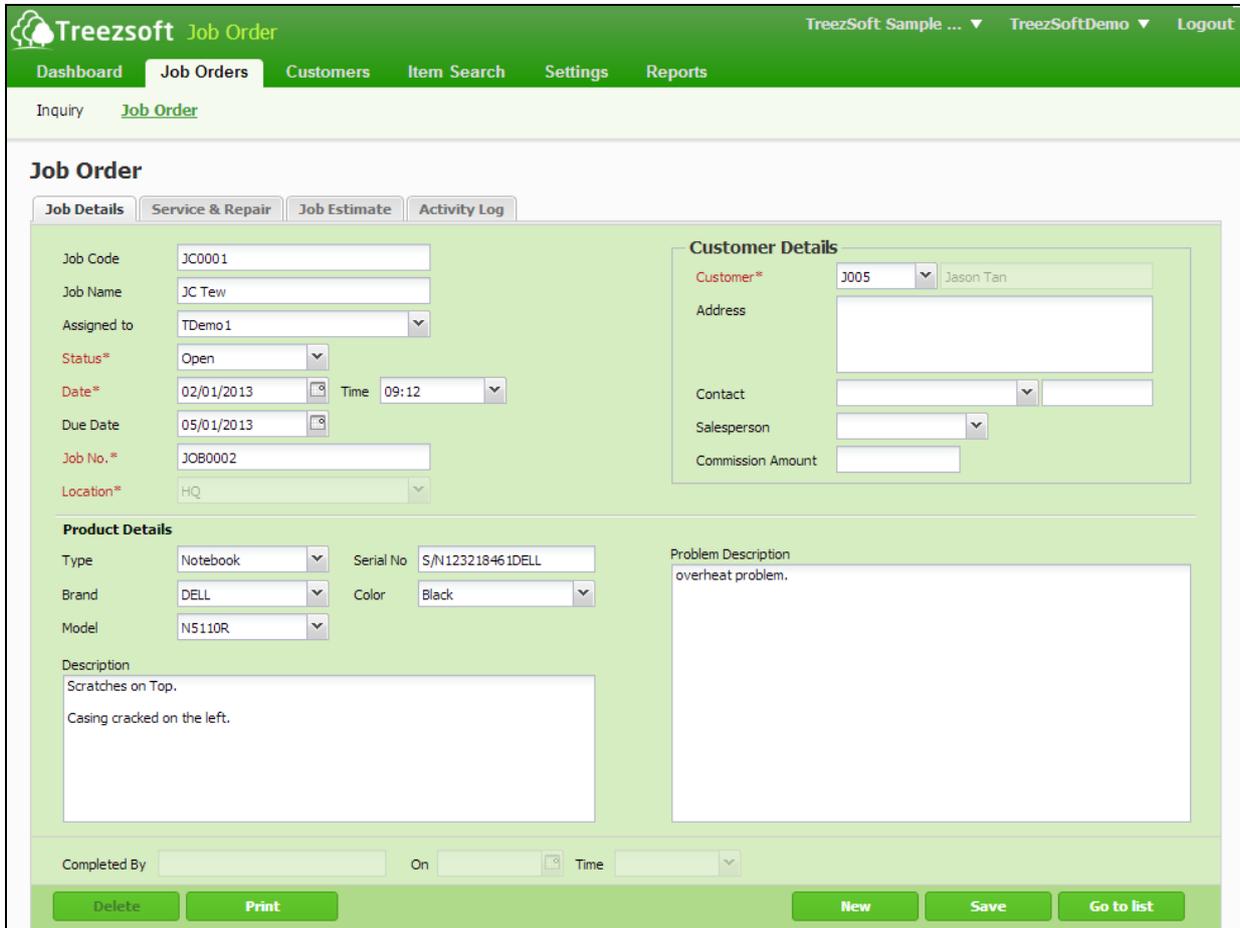
Job Order Inquiry illustrates the list of job orders you have entered. The criteria to view the list of job orders are based on the **date range** entered by you.

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:



The screenshot shows the TreezSoft Job Order Entry screen. The top navigation bar includes 'Dashboard', 'Job Orders', 'Customers', 'Item Search', 'Settings', and 'Reports'. The main content area is titled 'Job Order' and contains several sections:

- Job Details:** Fields for Job Code (JC0001), Job Name (JC Tew), Assigned to (TDemo1), Status* (Open), Date* (02/01/2013), Time (09:12), Due Date (05/01/2013), Job No.* (JOB0002), and Location* (HQ).
- Customer Details:** Fields for Customer* (J005), Customer Name (Jason Tan), Address, Contact, Salesperson, and Commission Amount.
- Product Details:** Fields for Type (Notebook), Brand (DELL), Model (N5110R), Serial No (S/N123218461DELL), and Color (Black).
- Description:** A text area containing 'Scratches on Top.' and 'Casing cracked on the left.'
- Problem Description:** A text area containing 'overheat problem.'
- Completed By:** A field for the user who completed the job, with 'On' and 'Time' fields.

At the bottom, there are buttons for 'Delete', 'Print', 'New', 'Save', and 'Go to list'.

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:

Job Order

Job Details
Service & Repair
Job Estimate
Activity Log

Customer* JC0001 JC Tew

Address

Contact

Job No.* Auto-generated

Status* Open

Date* 18/01/2013

Due Date

Check-in Type* Drop Off

Check-out Type* Pick Up

Max. Price

Location* Branch

Assigned To TDemo1

Salesperson hariza

Commission Amount 10.00

Deposit

Receipt No. Auto-generated

Payment Method

Deposit Amount

Cheque No.

[Print Receipt](#)

Check-in Details

System Type* Windows 7 Serial No. SN8888

Under Warranty Color Black

Brand Dell Remark Scratches on Top

Model D123 Casing cracked on the left

Accessories

Description	Quantity	Serial No.	
AC Power	1.00	NNN12345	✖
Lithium Battery	1.00	MMM1656	✖

[Add line](#)

Initial Check

Power On Optical Drive System Password 123456

System Boot USB

BIOS Access Battery

Screen

Problem Description

Flickering screen..

Completed By On

[Delete](#)
[Check-in Receipt](#)
[New](#)
[Save](#)
[Go to list](#)

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

Job Order Entry Screen – Service & Repair

Treezsoft Job Order
TreezSoft Sample ... ▼ TreezSoftDemo ▼ Logout

Dashboard **Job Orders** Customers Item Search Settings Reports

Inquiry Job Order

Job Order

Job Details
Service & Repair
Job Estimate
Activity Log

Task

Type	Description	Duration (hr)	Enter By	Enter On	
Dismantling	Dismantling	1.00	soofing@hotmail.com	17/01/2013 17:56:18	✖

Add line

Item Used

Item Code	Description	Quantity	UOM	Invoice No.	
Stock_00011	160GB HDD NOTEBOOK 2.5 IDE - W/DIGITAL*	1.00	unit	IV0009	✖

Add line
Create Sales Invoice
Create Cash Sales

Completed By On Time

Delete
Print
New
Save
Go to list

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

Treezsoft Job Order
TreezSoft Sample ... TreezSoftDemo Logout

Dashboard **Job Orders** Customers Item Search Settings Reports

Inquiry **Job Order**

Job Order

Job Details
Service & Repair
Job Estimate
Activity Log

Customer: Jason Tan

Address:

Job No.:

Date:

Contact:

Click on the button next to the price to view Price history.

Item Code	Description	Quantity	UOM	Unit Price	Tax Rate	Amount
Service	Service Charges - Repairing	1.00	each	120.00	\$	120.00 ✘
Subtotal						120.00
Grand Total						120.00

Completed By:
On:
Time:

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

Treezsoft Job Order
TreezSoft Sample ... ▾ TreezSoftDemo ▾ Logout

Dashboard **Job Orders** Customers Item Search Settings Reports

Inquiry **Job Order**

Job Order

Job Details Service & Repair Job Estimate **Activity Log**

Date/Time	Action	Status	Assigned To	Customer Code	Customer	User
2013-01-17 16:23:31	Created	Open	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:26:10	Modified	Open	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:27:04	Modified	Open	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:27:40	Modified	Open	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:27:57	Modified	Open	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:28:13	Modified	Closed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:28:25	Modified	Completed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:28:29	Modified	Completed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:30:56	Modified	Closed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:31:34	Modified	Completed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:33:02	Modified	Closed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:33:22	Modified	Completed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:33:32	Invoice Created	Completed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 16:33:51	Modified	Closed	soofing@hotmail.com	J005	Jason Tan	soofing@hotmail.com
2013-01-17 17:55:45	Modified	Open	TDemo1	J005	Jason Tan	soofing@hotmail.com
2013-01-17 17:55:56	Modified	Open	TDemo1	J005	Jason Tan	soofing@hotmail.com
2013-01-17 17:56:18	Modified	Open	TDemo1	J005	Jason Tan	soofing@hotmail.com

Completed By On Time ▾

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