

Business Goals

Clearly communicate daily & weekly responsibilities to individuals & teams

Work more efficiently by eliminating distractions & highlighting important details

Save time & reduce errors

Technical Objectives

Create a variety of different calendars by changing Display Type, Colors or Activities

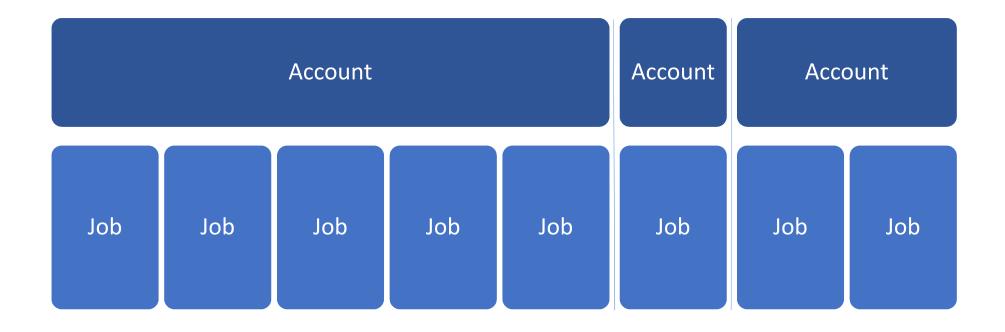
Show Subtotals on your Calendar (for square feet, # slabs, \$, etc.)

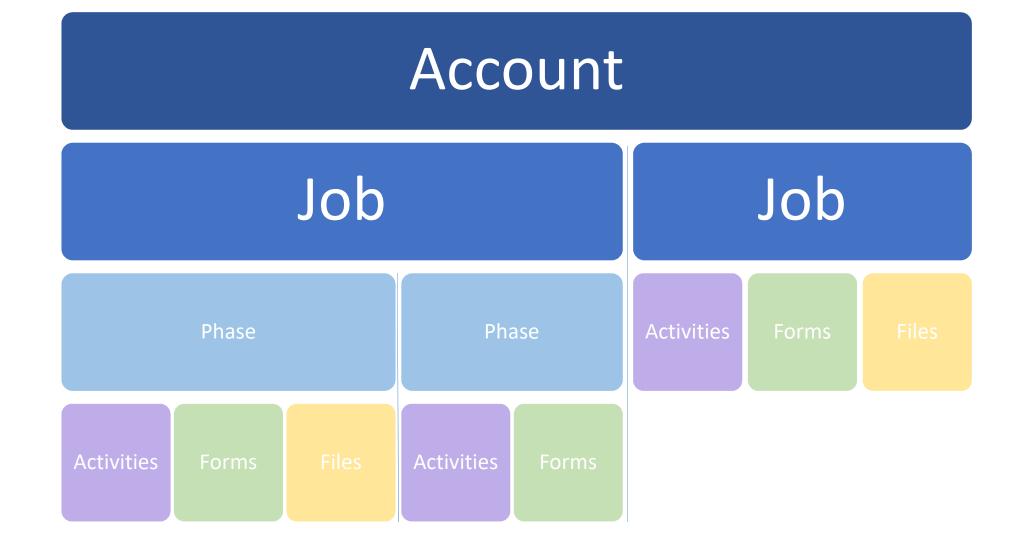
Filter your calendar by a Custom Job Field, Form Field or Activity Status

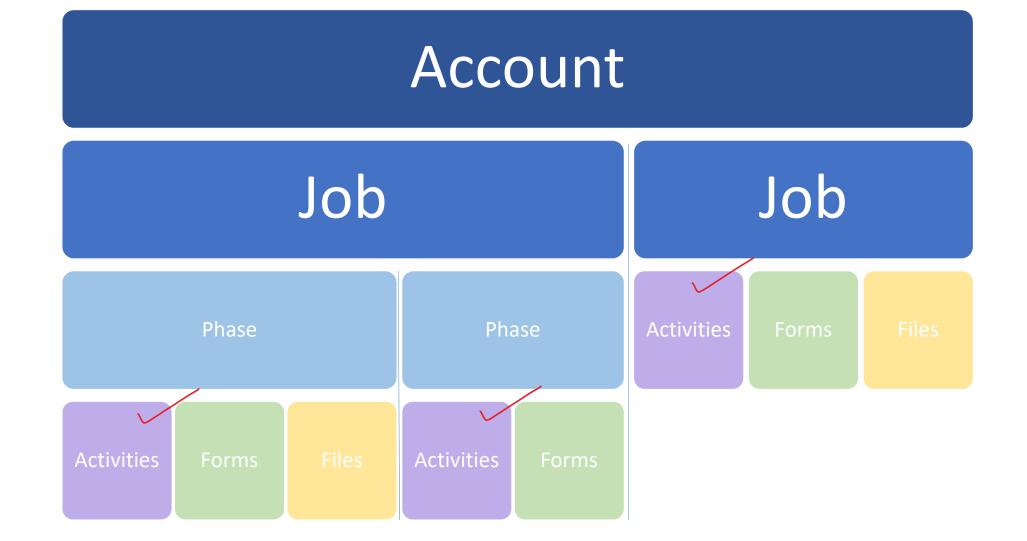
Map Activities and group by Assignee

Customize Activity Packets and include attached files

Your JobTracker







Most Calendars look like this...

alendar Optons Views - Save	View New Appointment Printable View				
ctivity Type: Template, Fabrica olor Activities By: Activity Type					
Friday, February 10, 2017 Pre	vious 30 days Next 30 days Go to Today				
londay	Tuesday	Wednesday	Thursday	Friday	Saturday
/6/2017 (13 hours)	2/7/2017 (25 hours)	2/8/2017 (19.5 hours)	2/9/2017 (39h 45m)	2/10/2017 (49h 25m)	2/11/2017
owe's #620	Home Depot #150	Home Depot #150	Home Depot #150	ABC Builders, Inc.	
obert Cole	Leanna's kitchen	Colleen's kitchen	Diana's Kitchen	Gus's kitchen	
3014	S3186	S3130	S3114	S3278	
	Leanna Smth	Colleen foley		Gus Foley	
23 Main Street	12345 Eim	1234 main	213 Maple	12810 lvydale Dr	
allas, TX	Magnolia	1.COT MONT	L to mape	Houston, TX 77049	
:00am - 10:00am (2 hours)	8:00am - 10:30am (2.5 hours)	8:30am - 11:00am (2.5 hours)	Unscheduled (2.5 hours)	Unscheduled (2.5 hours)	
llestone	Silestone, Granite, Granite	Silestone		Silestone	
star White	bamboo, luna pearl, uba tuba	Ariel		Bamboo	
9	98, 85, 35	77		68	
ove Dupont	Bevel, Bevel, Bevel	3/8" Rounded		Bulnose	
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	And the second sec			Customer has sink	
earout - laminate	Tearout - stone			Tearout - stone	
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				Commi sink model, ladcet mo	
Norm	Bob	Bob	Bob	Emma	
	HOUSTON				
owe's #620	Home Depot #150	Texas Kitchens	ABC Builders, Inc.	Katerina & Phil Jackson	
like Jones	Antonio's kitchen	Lydia Lorenz	The Bradbury Building	Katerina's kitchen	
3025	S3181	S3111	\$3072	S3276	
im Craig	Antonio Teodoro	Greg Bahnsen		Katerina	
100 Valley Rd	123 Main	102 E. Brenham Street	123 main street	100 Jackson	
esquite, TX 75187	and a second state of the	Denton, TX 76210	dallas, tx	Houston	
2:00pm - 2:30pm (2.5 hours)	12:30pm - 3:00pm (2.5 hours)	10:30am - 1:00pm (2.5 hours)	8.00am - 12.00pm (4 hours)	8:00am - 10:30am (2.5 hours)	
ranite	Granite, Granite	Silestone, Silestone	Granite	Granite	
bsolute Black 8	uba tubea, blue 85, 45	White Diamond, Ariel 35, 80	Uba Tuba 225	Cosmic grey 57	
aterfall	Bevel	Bevel Bevel	Bullnose	0gee	
D	Detter	no, yes	ves	yes	
ee layout		10,700	A COL	,	
o Tearout		Tearout - tile		Tearout - laminate	
orm	Norm	Norm	Norm	Norm	
			I talked to Don	Ask about doing powder room in bsement	
				Change order - color	
lob	Bob	Emma	Bob		
IOUSTON	DALLAS			HOUSTON	



There's no perfect calendar

What makes a good Calendar View?

- Who will be using it?
- Where will they be looking at it? What device?
- What task are they trying to complete?
- What do they need to see?



Install Calendar

Is it for the person who schedules the Installs or person who does the installing?

- Where will they be looking at it? What device?
- What task are they trying to complete?
- What do they need to see?

Remove what you don't need

Options Views - Sav	e View New Appointment Printable View				
ctivity Type: Template, Fabric					
olor Activities By: Activity Typ					
	evious 30 days Next 30 days Go to Today				
Jenday, February 10, 2017 [Pr Jonday	Tuesday	Wednesday	Thursday	Friday	Saturday
1/6/2017 (13 hours)	2/7/2017 (25 hours)	2/8/2017 (19.5 hours)	2/9/2017 (39h 45m)	Q2/10/2017 (49h 25m)	2/11/2017
.owe's #620	Home Depot #150	Home Depot #150	Home Depot #150	ABC Builders, Inc.	
Robert Cole	Leanna's kitchen	Colleen's kitchen	Diana's Kitchen	Gus's kitchen	
3014	53186	\$3130	53114	\$3278	
	Leanna Smith	Colleen foley		Gus Foley	
23 Main Street	12345 Elm	1234 main	213 Maple	12810 lvydale Dr	
allas. TX	Magnolia			Houston, TX 77049	
00am - 10:00am (2 hours)	8:00am - 10:30am (2.5 hours)	8:30am - 11:00am (2.5 hours)	Unscheduled (2.5 hours)	Unscheduled (2.5 hours)	
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Star White	bamboo, luna pearl, uba tuba	Ariel		Bamboo	
19	98. 85. 35	77		68	
Cove Dupont	Bevel, Bevel, Bevel	3/8" Rounded		Bullnose	
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103	yes	10		Customer has sink	
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with the second s	HOUSTON			Linna	
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lesquite, TX 75187	and a second	Denton, TX 76210	dallas, tx	Houston	
2:00pm - 2:30pm (2.5 hours)	12:30pm - 3:00pm (2.5 hours)	10:30am - 1:00pm (2.5 hours)	8:00am - 12:00pm (4 hours)	8:00am - 10:30am (2.5 hours)	
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Vaterfall	Bevel	Bevel, Bevel	Bullnose	Ogee	
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lo Tearout		Tearout - tile	An and a second s	Tearout - laminate	
lorm	Norm	Norm	Norm	Norm	
			I talked to Don	Ask about doing powder room in bsement	
				Change order - color	
Rob	Bob	Emma	Bob	- change of del - color	
	DALLAS			HOUSTON	

Start with the Options Button

Account	Sales Le	ad Job	Calendar Repo	rt Admin S			
Calendar							
Options	Views 🗸	Save View	New Appointment	Printable View			
Activity Typ Color Activiti			on, Install, Repair				
Friday, Fel	bruary 10, 20	17 Previous 3	0 days Next 30 days G	to Today			
Monday			Tuesday				
2/6/2017 (13	hours)		2/7/2017 (25 hours)				
Lowe's #620 Robert Cole S3014			Home Depot #150 Leanna's kitchen S3186				
123 Main Stree Dallas, TX 8:00am - 10:00 Silestone Star White			Leanna Smith 12345 Elm Magnolia 8:00am - 10:30am (2.5 hour Silestone, Granite, Granite bamboo, luna pearl, uba tub				
39 Cove Dupont			98, 85, 35 Bevel, Bevel, Bevel				

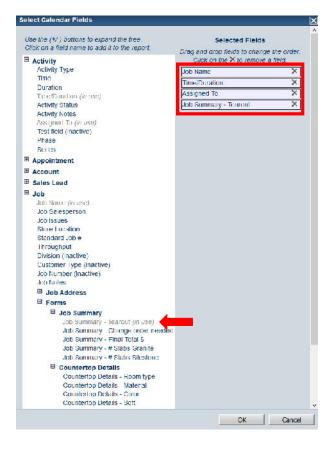
Select Activity Type – Install

Activity types I empate, Fabrication, Install, Repar Select (Class Assigned To Cect (Mosel) Show activities where: Add Fite Tegin Date 2/10/2017 Number of Days 30 ~ Display Type Week by Weekday (Rows by Columns) Subtotals Color Activities By Activity Type (Rows by Columns) Subtotals Activity Type (Rows by Columns) Subtotals Activity Type (Rows by Columns) Subtotals (Rows	alendar - Options			x
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Job Summary Tearout X		Countertop Details - Notes	×	
		Job Summary Tearout	×	
Assigned To		Assigned To	×	
Activity Notes X		Activity Notes		
Job issues		Job issues	×	
Salesperson				
Store Location X		Store Location	X	

1 10	em selected Selected Only			
	Activity Type	Process		
-		Sales Lead	Job	
	Appointment	No	No	
	Job Sold!	Yes	Yes	
	Collect Deposit (Inactive)	No	Yes	
1	Template	No	Yes	
	Fabrication	No	Yes	
Z	Instal	No	Yes	
	Invoice	NO	Yes	
	Repair	No	Үсэ	
0	Plumbing (Inactive)	No	Yes	
	Finish (cabinets)	No	Yes	
	New Sales Lead Created	Yes	No	
	Walk In	Yes	No	
	Cal-In	Ycs	No	
٦	Outbound Cold Call	Yes	No	
	Phone Call / Email Follow Up	Yes	No	
	Followup Email (Inactive)	Yes	No	
	Showroom Visit (Inactive)	Yes	No	
	Delivery	No	Үсэ	
	Job In QB (Inactive)	No	Yes	
	Lowe's call confirmation (Inactive)	Yes	No	

Clear fields & select only fields needed

Activity Types:	Lemplate, Fabrication, Install, Repart		Select IClea
Assigned To:	- Select Mysen		
Show activities where:	Add Fiter		
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	Address	×	
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	Job issues	X	
	Salesperson	×	
	Store Location	X	



Install Calendar

Activity Types:	Instal	~	Select	lear
Assigned To:	Select	t Myself		
Show activities where.	Add Filter			
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Display Type:	Week by Weekday	~ (F	Rows by Coli	unns)
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	Job Summary Tearout		X	

Account Sales Le	ad Job Calend	ar Report Admi	n Search Helj	o CounterGo Sig	gn Out:kathl
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Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2/13/2017 (17 hours)	2/14/2017 (14 hours)	2/15/2017 (8 hours)	2/16/2017 (12 hours)	2/17/2017 (12 hours)	2/18/2017
Barry Newcomb Urischeduled (4 hours) Unassigned No Tearout	Conner Dre 8:00am - 2:00pm (6 hours) Ill Crew #1 Fearout	Denise Tumer 8.00am - 2.00pm (6 hours) Instal Crew #1 No Tearoul	Brigid's kitchen Unscheduled (4 hours) Install Crew #1	Wayne Richmond 8.00am - 12.00pm (4 hours) Install Crew #1 No Tearoul	
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Conner Dre 1:00pm - 5:30pm (4.5 hours) Install Crew #1 No Tearout					
2/20/2017 (25 hours)	2/21/2017 (16 hours)	2/22/2017 (20 hours)	2/23/2017 (18 hours)	2/24/2017 (24 hours)	<u>2/25/2017</u>
Clare Goode Unscheduled (4 hours) Install Crew #2	Reynaldo's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2	EXathleen's 8:00am - 3:30pm (7.5 hours) Install Crew #1	💼 Kathleen's 8:00am - 3:30pm (7.5 hours) Install Crew #1	➡ Kathleen's 8:00am - 3:30pm (7.5 hours) Install Crew #1	

Change the Shape – Display Type

Calendar - Options		X
Activity Types:	Install	Select [Clear]
Assigned To:	Select Mys	self
Show activities where:	Add Filter	
Begin Date:	2/10/2017	
Number of Days:	30 ~	
Display Type:	Assignee by Day	(Rows by Columns)
Subtotals:	Assignee by Day Day by Activity Type	Select [Clear]
Color Activities By:	Day by Assignee Day by Display Field	
Wrap Text:	Day by Time	
Auto Refresh	Day & Assignee by Display Field	
Display Fields	Day & Assignee by Time Week by Weekday Week & Assignee by Weekday	×
Display Fields: (Click X to remove fields.)	Time/Duration	×
	Assigned To	×
	Job Summary - Tearout	×

Show only Installers & Unassigned

Calendar - Options	X	<	ct Assignees				
Activity Types:	Install V Select [Clear]		items selected	Selected Only	·	5earch	Active Assignees On
Assigned To:	(Unassigned), Install Crew #1, Install Crew #2 Select [Myself]		Assignee	Description			
Show activities where:			(Unassigned)				
Begin Date:			Norm				
Number of Days:			Marco				
	Assignee by Day V (Rows by Columns)		Ben				
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Wrap Text:			Install Crcw #2				
Auto Refresh			Jeff				
	Select Fields [Clear]		Nora				
	Job Name		Rey	Plumber			
Display Fields:	Time/Duration		George Kathleen	Plumber			
Click 🗙 to remove fields.)	Assigned To		Clare				
	Job Summary - Tearout		Patrick				
			Bob				
	OK Cancel		Slephanie				
			Eric				
			Jason				
		(Row	vs 1 to 19 of 19)				

OK Cancel

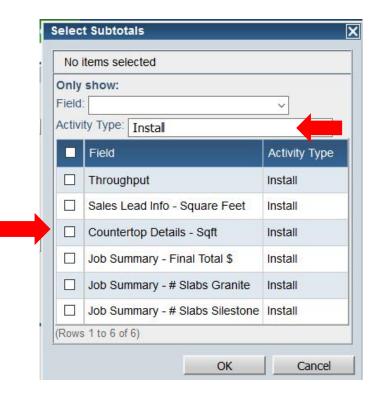
Show Sq Ft on Calendar

Activity Types:	Install V Select [Clear]
Assigned To:	(Unassigned), Install Crew #1, Install Crew #2 Select [Myself]
Show activities where:	Add Filter
Begin Date:	2/10/2017
Number of Days:	5 ~
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Subtotals:	Countertop Details - Sqft - Install Select Clear)
Color Activities By:	Activity Type
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	Assigned To
	Job Summary - Tearout

ND	items selected	
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	Field	Activity Type
	Throughpul	Job Sold!
	Throughput	Collect Deposit
	Throughput	Template
Ц	Throughput	Fabrication
	Throughput	Install
Ц	Throughput	Invoice
	Throughput	Repair
U	Throughput	Plumbing
	Throughput	Finish (cabinets)
	Throughput	New Sales Lead Created
	Throughput	Walk-In
	Throughput	Call-In
	Throughput	Outbound Cold Call
	Throughput	Phone Call / Email Follow Up
	Throughput	Followup Email
	Throughput	Showroom Visit
	Throughput	Delivery
	Throughput	Job In QB
	Throughput	Lowe's call confirmation
	Sales Lead Info - Square Feet	Job Sold!

Show Sq Ft on Calendar

Activity Types:	Instal
Assigned To:	(Unassigned), Install Crew #1, Install Crew #2 Select Myself
Show activities where:	Add Filter
Begin Date:	2/10/2017
Number of Days:	5 ~
Display Type:	Assignee by Day (Rows by Columns)
Subtotals:	Countertop Details - Sqft - Install
Color Activities By:	Activity Type
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Display Fields: (Click X to remove fields.)	Time/Duration X
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	Job Summary - Tearout



Show Sq Ft on Calendar

Calendar - Options	٥
Activity Types:	Instal V Select [Clear]
Assigned To:	(Unassigned), Install Crew #1, Install Crew #2 Select Myselfi
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Display Fields	Job Name X
Display Fields: (Click X to remove fields.)	Time/Duration ×
	Assigned To
	Job Summary - Tearout
	OK Cancel

elec	t Subtotals		>
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Only	show:		
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Activ	ity Type:	~	
	Field	Activity Type	
	Countertop Details - Sqft	Job Sold!	
	Countertop Details - Sqft	Collect Deposit	
	Countertop Details - Sqft	Template	
	Countertop Details - Sqft	Fabrication	
	Countertop Details - Sqft	Install	
	Countertop Details - Sqft	Invoice	
	Countertop Details - Sqft	Repair	
	Countertop Details - Sqft	Plumbing	
	Countertop Details - Sqft	Finish (cabinets)	
	Countertop Details - Sqft	New Sales Lead Created	
	Countertop Details - Sqft	Walk-In	
	Countertop Details -	Call-In	
		OK Cance	el

Now we can drag/drop

Options	Views - Save View New	Appointment Printable View.			
activity Type: Ir Color Activities	nstall By: Activity Type				
Monday, Febr	ruary 13, 2017 Previous 5 days	Next 5 days Go to Today			
	<u>Monday</u> 2/13/2017	<u>Tuesday</u> 2/14/2017	<u>Wednesday</u> 2/15/2017	<u>Thursday</u> 2/16/2017	<u>Friday</u> 2/17/2017
	(4 hours) Countertop Details - Sqft - Install: 65				
Jnassigned	Barry Newcomb Unscheduled (4 hours) Unassigned No Tearout				
	(9 hours) Countertop Details - Sqft - Install: 72	(6 hours) 2 Countertop Details - Sqft - Install: 20	(6 hours) 7 Countertop Details - Sqft - Install:	(4 hours) 78 Countertop Details - Sqft - Install:	(4 hours) 130 Countertop Details - Sqft - Install
nstall Crew #1	Jeff Cotes 8:00am - 12:30pm (4.5 hours) Install Crew #1 Tearout - Iaminate	Conner Dre 8:00am - 2:00pm (6 hours) Install Crew #1 No Tearout	Denise Turner 8:00am - 2:00pm (6 hours) Install Crew #1 No Tearout	Brigid's kitchen Unscheduled (4 hours) Install Crew #1	Wayne Richmond 8:00am - 12:00pm (4 hours) Install Crew #1 No Tearout
	Conner Dre 1:00pm - 5:30pm (4.5 hours) Install Crew #1 No Tearout				
	(4 hours) Countertop Details - Sqft - Install: 78	(8 hours) Countertop Details - Sqft - Install: 17	(2 hours) 8 Countertop Details - Sqft - Install:	(8 hours) 45 Countertop Details - Sqft - Install:	(8 hours) 218 Countertop Details - Sqft - Install:
nstall Crew #2	Sally Zurich 8:00am - 12:00pm (4 hours) Install Crew #2 No Tearout	Eddie's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - stone	Cyra's Kitchen 3:00pm - 5:00pm (2 hours) Install Crew #2 Tearout - laminate	Daniel's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - laminate	Ann's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - stone
	Barry Newcom	Timothy's kitchen 4 hours)		Willy Hayes 12:30pm - 4:30pm (4 hours) Install Crew #2	Leanna's kitchen 1:00pm - 5:00pm (4 hours) Install Crew #2

Save your view to use again

Account Sales Lead Job Calendar Report Admin Search	Help
Calendar	
Options Views - Save View New Appointment Printable View	
Activity Type: Install	
Assigned To: (Un Save View	
Color Activities B O My View	
Tuesday, March Shared View Name: Install Schedule Select.	
Assignee 3 D Make this my default view	/2011
(4	
B OK Cancel	
(Unassigned)	
Accou	int Sales Lead Job Calendar Report Admin Search
Calen	dar 🎽
Optio	ns Views Save View New Appointment Printable View
Activity	Type: Search:
Assign	ing tions
Color A	Ctivitie Dallas fab with appt [Rename] X
Tue:	sday, Ma Kathleen's installs and templates [Make Default] [Rename] ×
Assign	Norm's View [Make Default] [Rename] ×
Assign	Shared Views
	Standard View (default) [Rename] ×
	1-Assignee by Day - Install Crews [Make Default] [Rename] X
(1)	2-Day by Activity Type - Production Calendar [Make Default] [Rename] X

Charlie's Calendar

- Daily Fabrication To Do List
- Show #slabs needed for each Job
- Show only Jobs at our Dallas location



Start from an existing View

Calendar							
Options Views - Save View	New Appoin	tment Printable View	i				
Activity Type: Fabrication Color Activities By: Countertop Detail	s - Material						
Friday, February 10, 2017 Previous	2 days Next 2 day	s Go to Today					
Date	Job Name	Countertop Details - Color	Countertop Details - Sqfl	Countertop Details - Edge	Countertop Details - Sink Mode	Countertop Details - Notes	Job Issues
	📅 Cheryl's kitchen	Luna Pearl	66	Bullnose	h234		\rm Rush - broke slab
	Dave Lydon	whitest white, caledonia	85, 31	Cove Dupont, Ogee	JKI90, abc898		
Friday 2/10/2017	The second second second	Luna Pearl	79	Cove Dupont	jk456	Note cutout for trash	
Countertop Details - Sqft - Fabrication: 572		black, blue	55, 89	Bevel, Ogee	hg788, abc 7899		
	Eric Smith	autumn, uba tuba, absolute blac	30, 52, 65	Bevel, Bevel, Bevel	BJ87, F5678, B1234	Note layout for preferences	
	Mike Jones	Absolute Black	86	Waterfall	kfg456	see layout	
Saturday 2/11/2017							
Friday, February 10, 2017 Previous	2 days Next 2 day	s Go to Today					

What are we looking at?

Activity Types:	Fabrication V Select [Clear]
Assigned To:	Select [Myself]
Show activities where:	Add Filter
Begin Date:	2/10/2017
Number of Days:	2 ~
Display Type:	Day by Display Field V (Rows by Columns)
Subtotals:	Countertop Details - Sqft - Fabrication Select IClear
Color Activities By:	Countertop Details - Material
Wrap Text:	
Auto Refresh	
Auto Refresh	Select Fields [Clear]
Auto Refresh	Select Fields [Clear]
Auto Refresh	
Display Fields:	Job Name
	Job Name × Countertop Details - Color ×
Display Fields:	Job Name X Countertop Details - Color X Countertop Details - Sqft X
Display Fields:	Job Name × Countertop Details - Color × Countertop Details - Sqft × Countertop Details - Edge ×

Color Activities By – Form

Calendar - Options	×
Activity Types:	Fabrication V Select [Clear]
Assigned To:	Select Myselfi
Show activities where:	Add Filter
Begin Date:	2/10/2017
Number of Days:	2 ~
Display Type:	Day by Display Field (Rows by Columns)
Subtotals:	Countertop Details - Sqft - Fabrication, Countertop D. Select [Clear]
Color Activities By	Countertop Details - Material 🗸
Wrap Text	
Auto Refresh	Assignee Type
Display Fields: (Click X to remove fields.)	Store Location Division Countertop Details - Material Job Summary - Change order needed Countertop Details - Sqft Countertop Details - Edge Countertop Details - Sink Model
	Countertop Details - Notes X Job Issues X
	OK Cancel

Room type: Master bath			
Material:	Color:	Sqft:	Edge:
Granite	caledonia	31	Ogee
Sink type:	Sink Model:	Sink in stock:	Faucet info:
Undermount	abc898	no	

Add Subtotal #Slabs

Activity Types:	Fabrication ~	Select [Clear]
Assigned To:	Select [Myself]	
Show activities where:	Add Filter	
Begin Date:	2/10/2017	
Number of Days:	2 ~	
Display Type:	Day by Display Field 🗸 🗸 (Rows by Columns)
Subtotals:	Countertop Details - Sqft - Fabrication	Select [Clear]
Color Activities By:	Countertop Details - Material	~
Wrap Text:		
Auto Refresh		
	Select Fields [Clear]	
	Job Name	×
	Countertop Details - Color	X
Display Fields:	Countertop Details - Sqft	×
(Click 🗙 to remove fields.)	Countertop Details - Edge	×
	Countertop Details - Sink Model	X
	Countertop Details - Notes	×
	Job Issues	X

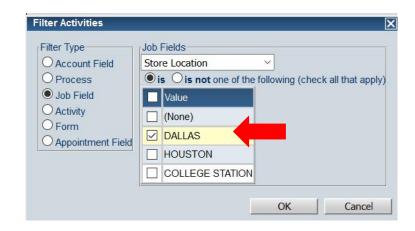
3 ite	ems selected Selected Only	
ield	show:	~
ctiv	ty Type: Fabrication	~ ·
	Field	Activity Type
	Throughput	Fabrication
	Sales Lead Info - Square Feet	Fabrication
	Countertop Details - Sqft	Fabrication
	Job Summary - Final Total \$	Fabrication
	Job Summary - # Slabs Granite	Fabrication
	Job Summary - # Slabs Silestone	Fabrication
lows	1 to 6 of 6)	

Filter by Location

	Fabrication V Select [Clear]
Assigned To:	Select [Myself]
Show activities where:	Add Filter
Begin Date:	2/10/2017
Number of Days:	2 ~
Display Type:	Day by Display Field V (Rows by Columns)
Subtotals:	Countertop Details - Sqft - Fabrication Select [Clear]
Color Activities By:	Countertop Details - Material
Wrap Text:	
Auto Refresh	
Auto Refresh	Select Fields [Clear]
Auto Refresh	Select Fields [Clear]
Auto Refresh	
Display Fields:	Job Name X
	Job Name X Countertop Details - Color X
Display Fields:	Job Name X Countertop Details - Color X Countertop Details - Sqft X
Display Fields:	Job Name X Countertop Details - Color X Countertop Details - Sqft X Countertop Details - Edge X

	Job Fields	<u>14</u>
O Account Field	Job Status	·
O Process	Job Name	ving (check all that apply):
Job Field	Job Status	
O Activity	Job Creation	
O Form	Job Salesperson	
O Appointment Field	Job Notes Store Location	
	Standard Job #	
	Division (Inactive)	OK Cancel
COIOL ACTIVITICS DY.	Customer Type (Inactive)	
and the second second	Job Number (Inactive)	
Wrap Text:	Throughput	
Auto Refresh		
	Select Fields [Clear]	
	Select Fields [Clear] Job Name	×
		×
Display Fields:	Job Name	
Display Fields: (Click X to remove fields.)	Job Name Countertop Details - Color	×
	Job Name Countertop Details - Color Countertop Details - Sqft	
	Job Name Countertop Details - Color Countertop Details - Sqft Countertop Details - Edge	

Filter by Location



Fabrication To Do List – Dallas

Calendar

Options Views - Save View	New Appointme	nt Printable View					
Activity Type: Fabrication Filters: Store Location is DALLAS Color Activities By: Countertop Details - I	vlaterial						
📕 Friday, February 10, 2017 Previous 2 da	ys Next 2 days 0	Go to Today					
Date	Job Name	Countertop Details - Color	Countertop Details -	- Sqft Countertop Details -	Edge Countertop Details - Si	nk Model Countertop Details - No	otes Job Issues
Friday 2/10/2017	료 Cheryl's kitchen	Luna Pearl	66	Bullnose	h234		\rm Rush - broke slab
Ocuntertop Dotails Ogft Fabrication: 220 Job Summary - # Slabs Granite - Fabrication: 4	Villy Hayes	Luna Pearl	79	Cove Dupont	jk456	Note cutout for trash	
	Nola's kitchen	black, blue	55, 89	Bevel, Ogee	hg788, abc 7899		

Template Schedule (for the Scheduler)

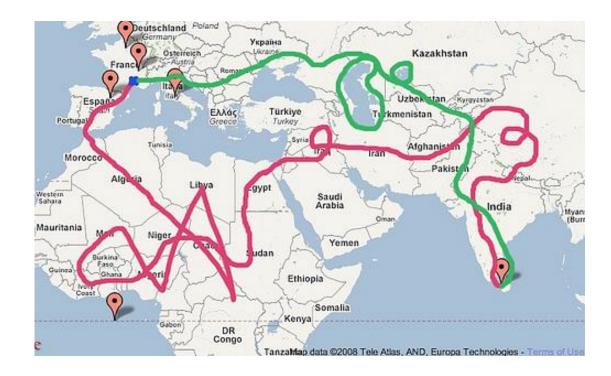
Calendar															
Options	Views 🗸 🛛 Save	View	New Appoint	ment	Printable View	N									
Color Activities I	By: Activity Typ	e													
Monday, February	uary 13, 2017 P	revious 14 d	ays Next 14	4 days Go	to Today							Calendar - Options			×
Date	Unscheduled	8am	:30	9am :00	:30	10am .00	:30	11am :00	:30	12pm :00	:30	Activity Types:	Appointment, Template	Sele	ct [Clear]
Monday	Gus's kitchen												(Unassigned), Norm, Marco	Sele	ect [Myself]
2/13/2017 (Unassigned)	Houston, TX 555-889-6565											Show activities where:			
Monday		Katerina's k	itchen						in's Kitchen			Begin Date			
Monday Katerina's kitchen 2/13/2017 Houston Norm 555-555-8548 Change order - color						Houston, 555-565-8									
		? Change	order - color	-	_	-					_	Number of Days:			
Monday 2/13/2017						Smelton Jo Blandtown	, KY					Display Type:	Day & Assignee by Time	(Rows by Comparison of the second	lumns)
Marco						494-234-4						0	Expand nours from 8 am y to 3	o pm 👻	
Tuesday												Subtotals:		Sele	ect [Clear]
(Unassigned)				-	-			_			_	Color Activities By.	Activity Type	~	
Tuesday								Margie's k	atchen			Wrap Text:			
<u>Norm</u>								Chang	je order - Lau	ndry room add	ed	Auto Refresh			
Tuesday 2/14/2017		Cory Smith						Eileen's ki Irving, TX					Select Felds [Clear]		
Marco								972-445-9				Diseles Fields	Job Name	×	
												Display Fields: (Click X to remove fields.)	City, State	X	
	Options Views - Save V Citivity Type: Appointment, Temp ssigned To: (Unassigned), Norr olor Activities By: Activity Type Monday, February 13, 2017 Pre- tate Unscheduled Ionday (13/2017 Gus's kitchen Houston, TX 555-889-6565 Ionday (13/2017 Gus's kitchen Londay (13/2017 Ionday (13/2017 Ionday (13/2017 Ionday (13/2017 Ionday (13/2017 Ionday (14/2017 Ionday (14/2017 Uesday (14/2017 Ionday (14/2017												Phone 1	×	
													Job Issues	×	
														ок	Cancel
														UN	Cancel

Drag & Drop

Calendar

Options	Views - Save	View	New Appoir	ntment	Printable Vie	w													
	ppointment, Ten	-																	
and the second se	Inassigned), Nor	and the second sec																	
Color Activities	By: Activity Type	3																	
🗏 Monday, Febru	uary 13, 2017 Pr	revious 14	days Next	14 days Go	to Today														
Date Unschedu	Unscheduled	8am		9am		10am		1 1am		12pm		1pm		2pm		3pm		4pm	
Jale	onscheduled	.00	.30	.00	.30	.00	.30	.00	.30	.00	.30	.00	.30	.00	.30	.00	.30	.00	.30
<u>Monday</u> 2/13/2017 (Unassigned)	Gus's kitchen Houston, TX 555-389-6565																		
<u>Monday</u> 2/13/2017 Norm		Katerina's Houston 555-555-61 ? Change		r				Joey Austin's Kitchen Houston, TX 555-565-8969							Houst	kitchen on, TX 89-6565			
A <mark>onday</mark> 2/13/2017 Aarco						Smelton Houston, 666-234-	TX										Bob Lec Houston, T 566-565-89		
uesday																			

Mapping Activities

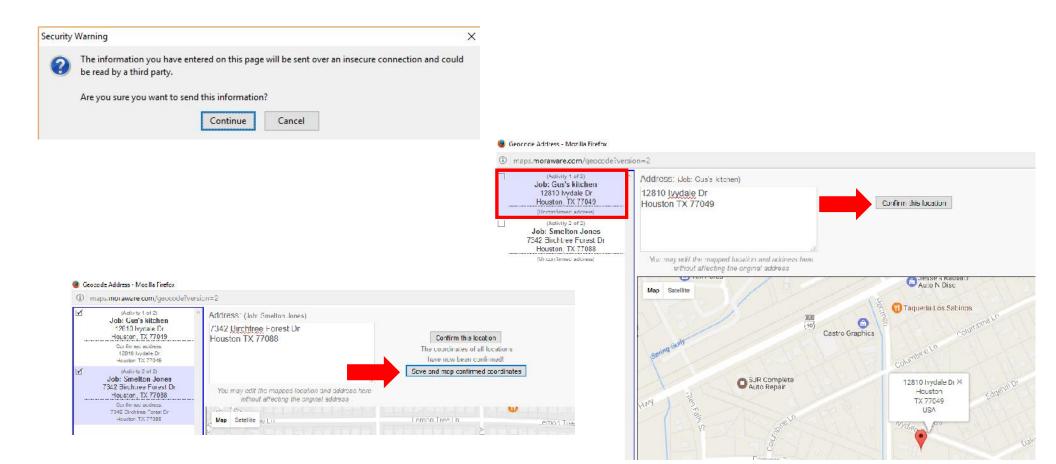


Mapping

Calendar

Options	Views 👻 🛛 Save	View	New Appoir	ntment	Printable Vie	ew						
Activity Type: A Assigned To: (U Color Activities	Inassigned), No	rm, Marco										
Monday, Febr	uary 13, 2017 P	revious 14 da	iys Next	14 days Go	to Today							
Data Unashadula		8am		9am		10am		11am	4.1	12pm	12	1pm
Date	Unscheduled	:00	:30	:00	:30	:00	:30	:00 :30		:00	:30	:00
<u>Monday</u> 2/13/2017 (Unassigned)	Gus's kitchen Houston, TX 555-889-6565											
								Joey Aus Houston 555-565-				
Mol Insert Job 2/1: New Appoi Ma Map Activit Tuesday 2/14/2017						Smelton J Blandtown 494-234-4	n, KY	///////////////////////////////////////				

Launches Google Maps

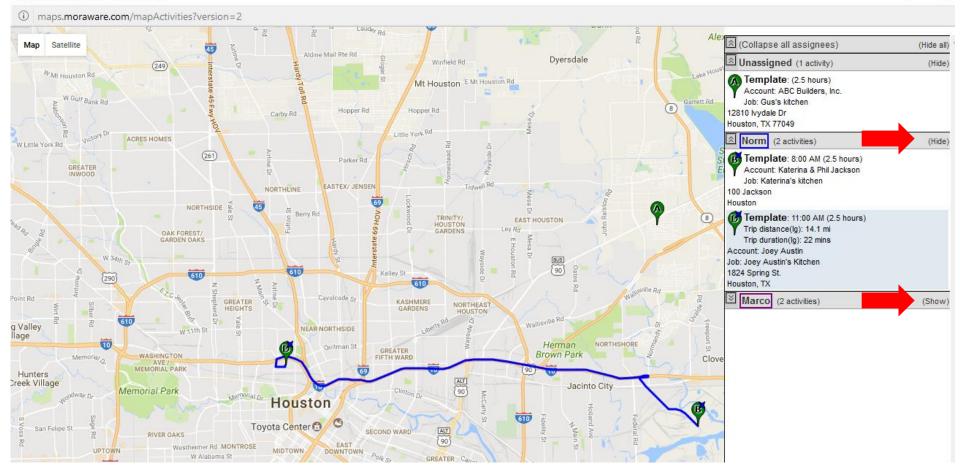


Maps by Assignee

Mapped Activities - Mozilla Firefox X i maps.moraware.com/mapActivities?version=2 Lauder Rd - 70 20 Al 🖄 (Collapse all assignees) Map Satellite (Hide all) Aldine Mail Rte Rd Dyersdale Winfield Rd Unassigned (1 activity) (Hide) (249) WMt Houston Rd Template: (2.5 hours) Mt Houston E Mt Houston Rd Account: ABC Builders, Inc. W Gulf Bank Rd Job: Gus's kitchen (8) Hopper Rd Hopper Rd 12810 lvydale Dr Carby Rd Houston, TX 77049 Little York Rd ACRES HOMES Norm (2 activities) (Hide) W Little York Rd (261) Template: 8:00 AM (2.5 hours) Parker Rd GREATER Account: Katerina & Phil Jackson INWOOD Job: Katerina's kitchen EASTEX/ JENSEN NORTHLINE 100 Jackson Houston 69 NORTHSIDE (A) Berry Ro TRINITY/ HOUSTON GARDENS Template: 11:00 AM (2.5 hours) (8) EAST HOUSTON Trip distance(lg): 14.1 mi OAK FOREST/ Trip duration(lg): 22 mins GARDEN OAKS Account: Joey Austin W 34/ BUS 90 Job: Joey Austin's Kitchen 610 1824 Spring St. 610 (290) 610 Houston, TX oint Rd Cavalcade St Marco (2 activities) GREATER KASHMERE (Hide) 5 B NORTHEAST GARDENS HOUSTON Template: 10:00 AM (2.5 hours) Wallisville Rd 6 Yale g Valley Account: Best Kitchens, Inc. NEAR NORTHSIDE w 11th St lage Job: Smelton Jones Herman NORTHSHORE Quitman St GREATER FIFTH WARD 7342 Birchtree Forest Dr Brown Park WASHINGTON Memoria/ Clove Houston, TX 77088 AVE/ MEMORIAL PARK 69 Hunters Template: 3:30 PM (1.5 hours) ALT (90) reek Village Jacinto City Trip distance(lg): 8.6 mi Memorial Park Trip duration(lg): 16 mins Houston B Account: Zander Contracting Job: Bob Lee Toyota Center 🔁 🔘 Voss Rd San Felipe St ALT (90) 1014 Wirt Rd. SECOND WARD RIVER OAKS In St Houston, TX 77055 EAST Westheimer Rd MONTROSE UPTOWN MIDTOWN DOWNTOWN Polk St W Alabama St GREATER Can 610

Show/Hide Assignee

😻 Mapped Activities - Mozilla Firefox



X



Activity Packets

Calendar				_															
Options	/iews 🚽 🛛 Save	View	New Appoi	ntment	Printable Vie	w													
Activity Type: Ap Assigned To: (U Color Activities I	nassigned), No	rm, Marco	1																
🖪 Monday, Febru	Jary 13, 2017 Pr	revious 14	days Next	14 days Go	to Today							2010-011							
Date	Unscheduled	8am :00	:30	9ат :00	:30	10am :00			:30	12pm :00	:30	1pm :00	:30	2pm :00	:30	3pm :00	:30	4pm :00	:30
<u>Monday</u> 2/13/2017 (Unassigned)										percent.	in Berneten								
<u>Monday</u> 2/13/2017 Norm		Kalerina's kilchen Houston 555-555-6548 ? Change order - color						Joey Austin's Kitchen Houston, TX 655-566-8089							Gus's kito Houston, 555-889-6	ТХ			
Monday 2/13/2017 Marco						Smellon Houston, 555-234-	TX										Bob Lee Llouston, 555-555-	ТХ	

Confirm Details

View	Printable Calenda	ar		×
	Date:	2/13/2017		
	Activity Types:	Appointment, Template		Select [Clear]
	Assigned To:	(Unassigned), Norm, Marco)	Select [Clear]
	Number of Days:	1		
	Page Breaks:	after each Assignee ~		
● J	ob Activity Packet:	Field Crew Packet ~		
(O Calendar Form:	Field Crews		
	Print As:	• PDF		
		OHTML		
			ОК	Cancel

Page Breaks

View Printable Calenda	ar		×
Date:	2/13/2017		
Activity Types:	Appointment, Template		Select [Clear]
Assigned To:	(Unassigned), Norm, Marco		Select [Clear]
Number of Days:	1		
Page Breaks:	after each Assignee 🗸		
Job Activity Packet:	(None) after each Assignee		
O Calendar Form:	after each Activity		
Print As:	after each Form		
		ОК	Cancel

Choose Packet (set up in advance)

View Printable Calend	ar	×
Date:	2/13/2017	
Activity Types:	Appointment, Template	Select [Clear]
Assigned To:	(Unassigned), Norm, Marco	Select [Clear]
Number of Days:	1	
Page Breaks:	after each Assignee ~	
Iob Activity Packet:	Field Crew Packet	
O Calendar Form:	Field Crew Packet Shop Packet	
Print As:	<new activity="" packet=""></new>	
	OHTML	
	ОК	Cancel

Compiled Activity Packets

	Page:	1 of 28		• 🕂 Automatic Zo	pom ‡	
C Stor	ompany R	ame				555-555-3585 Fax: 888-555-1212 info@domain.com www.domain.com
			JO	B SUMMARY FO	RM	
					Standard	Job #:
	me: a's kitchen				Standard S3276	Job #:
Katerin	a's kitchen				S3276	
Katerin	a's kitchen dress:				S3276	
	a's kitchen dress: a kson				S3276	Contact:
Job Add Katerina 100 Jac Houston	a's kitchen dress: a kson				S3276 Account C Phil	Contact:
Katerina Job Add Katerina 100 Jac Houston 555-555	a's kitchen dress: a kson				S3276 Account C Phil	Contact:
Katerina Job Add Katerina 100 Jac Houston 555-555	a's kitchen dress: kson -6548 ate Details:	Sched. Time	Assigned To	Notes	S3276 Account C Phil	Contact:

For each Activity on the Calendar

0	ompany	Tome					555-555-358 Fax: 888-555-121 info@domain.cor www.domain.cor
			JO	B SUMM/			
Job Na Joey Au	me: ustin's Kite	chen				Standard \$3073	Job #:
1824 Sp Houston 555-565 555-622 joey@do	, TX						
	Date	Sched. Time	Assigned To	Notes			
Phase		7 11:00am - 1:30pm	Norm	confirm s	slab images; ask ab	out laundry	room
Phase	2/13/201						
	2/13/201 Details:						
	Details:		ssigned To	Notes			
Install	Details: Date	Sched. Time	Assigned To nstall Crew #2		re date but must be	before 1/2	5. Confirm 3 days advance.
Install	Details: Date	Sched. Time	-		re date but must be	before 1/2	5. Confirm 3 days advance.
Install	Details: Date	Sched. Time	-			before 1/2	5. Confirm 3 days advance.
Install	Details: Date	Sched. Time 8:00am - 12:00pm I	nstall Crew #2	Flexible Job Che			•
Install Phase	Details: Date	Sched. Time 8:00am - 12:00pm I CHECK	nstall Crew #2	Flexible Job Che	ecklist		•

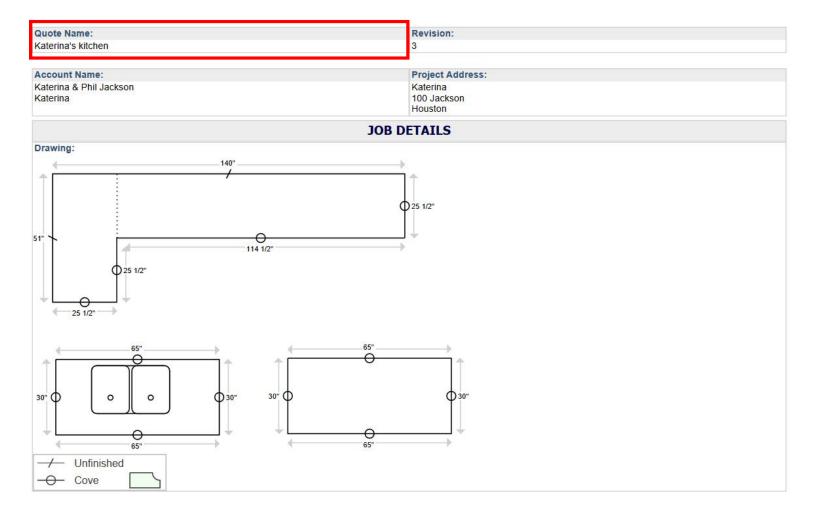
Include Open/Urgent Issues

Job Name:	Subject:	Category:	Status:	
Katerina's kitchen	color	Change order	? Open	
I ssue Type:	Last Update:	Last Updated By:	Update Count:	
Job	8:36:53 AM	kathleen	1	

History:

kathleen (12/12/2016 2:46:49 PM)	
Created	
Subject: laundry	
Status: Open	
Category: Change order	

Include CounterGo Quote Drawing



Include Attached Files



(but only the ones you want)

Mobile Devices

Change Status to
Create Duplicate Activity
View Job 'Joey Austin's Kitchen'
Printable View
Delete
View Activity Change Log

				JOB \$	UMM
Job Name: Joey Austin's	s Kitche	0			
Job Address	¢				
Joe & Donna 1824 Spring S					
Houston, TX					
555-565-8989					
joey@domain					
Template D	etails:				
Phase Date		Sched, Tim	a A.	signed To No	ins.
2/13	2017 1	1:00am - 1	:30pm No	orm cor	m
2/13	2017 1	1:00am - 1	:30pm No	orm cor	mirm
2/13 Install Detai		1:00am - 1	30pm No	orm oor	anrm
	ils:	1:00am - 1			tes
Install Detai Phase Date	ils: e So	ched. Time	Ass		tes
Install Detai Phase Date	ils: e So	ched. Time	Ass	signed To No	tes
Install Detai Phase Date	ils: e So	ched. Time	Ass	signed To No all Crew #2 Fle	ites xoible
Install Detai Phase Date	ils: e So	ched. Time 00am - 12:0	Ass 00pm Inst	signed To No all Crew #2 Fle	ites xible ib Ch
Install Detai Phase Date	ils: • So 2017 8:1	ched. Time 00am - 12:0	Ass 00pm Inst	signed To No all Crew #2 Fle Jo	ites xible ib Ch
Install Detai Phase Date 3/1/2	ils: • So 2017 8:1	ched. Time 00am - 12:0	Ass Dopm Inst	signed To No all Crew #2 Fie Jo LL BOXE	ites mible b Ch S B
Install Detai Phase Date 3/1/2 Deposit reo	ils: e So 2017 8:1 eived:	ched. Time 00am - 12:0 CH	Ass 00pm Inst ECK A	signed To No all Crew #2 Fle Jo LL BOXE Tearout:	ites mible b Ch S B
Install Detai Phase Date 3/1/2 Deposit rec P Final Total (\$5,300.00 Material Orc	ils: e So 2017 8:1 eived: \$:	ched. Time 00am - 12:0 CH	Ass 00pm Inst ECK A	signed To No iall Crew #2 Fle Jo ILL BOXE ! Tearout: Tearout - Iamin	ites initiale b Ch S B nate
Install Detai Phase Date 3/1/2 Deposit rec 2 Final Total 3 \$5,300.00	ils: e So 2017 8:1 eived: \$:	ched. Time 00am - 12:0 CH	Ass 00pm Inst ECK A	signed To No all Crew #2 Fie Jo ALL BOXE Tearout: Tearout - lamin te approved:	ites initiale b Ch S B nate
Install Detai Phase Date 3/1/2 Deposit rec P Final Total (\$5,300.00 Material Orc	ils: e So 2017 8:1 eived: \$: dered:	ched. Time 00am - 12:0 CH	Ass 00pm Inst ECK A	signed To No all Crew #2 Fie Jo ALL BOXE Tearout: Tearout - lamin te approved:	ites initiale b Ch S B nate
Install Detai Phase Date 3/1/2 Deposit rec P Final Total 1 \$5,300.00 Material Orc	ils: 2017 8:0 eived: k: dered: Details	ched. Time 00am - 12:0 CH	Ass D0pm Inst ECK A	signed To No all Crew #2 Fie Jo LL BOXES Tearout - lamin te approved: Material Rece	ites initiale b Ch S B nate
Install Detai Phase Date 3/12 Deposit reo Pinal Total 1 \$5,500.00 Material Ore Countertop	ils: 2017 8:0 eived: k: dered: Details	ched. Time 00am - 12:0 CH	Ass D0pm Inst ECK A	signed To No all Crew #2 Fie Jo LL BOXES Tearout - lamin te approved: Material Rece	ites wible b Ch S B nate

Calendar Settings



Calendar Settings	Activity Packets:	New Activity F	acket
Calendar Printable Forms	Packet Name	Sequence ↑	Status
Calendar i fintable i offits	Field Crew Packet	1	Active
Activity Packets	Shop Packet	2	Active
Appointment Categories	Wharehouse	3	Inactive

Activity Packets

Filit Packet Info		
Packet Name: Field Crew Packet		
Sequence. 1 Status: Active		
Packet Name	Sequence 1	Filters
Sales Lead / Job Form - Job Summary		Activity Types: Template, Install, Repair
	100	
Sales Lead / Job Form - Countertop Details	2	Activity Types: Template, Install, Repair
Sales Lead / Job Issue Form - Job Issue	2	Activity Types, Template, Install Issue Statuses: Urgent, Open
<u>Sales Feau / Jourissue Form - Jourissue</u>		All Issue Categories
		Activity Types: Template
CC Quote I orm - Drawing & Layout (no prices)	4	Print each form on a separate page
		Activity Types: Template
Sales Lead / Job Image File	5	File Extension: .bmp, .gif, .jpg, .jpcg, .png
	5	File Type. Customer drawing, Slab image
		Max Width: 7.5 inches
		Activity Types: Install
Sales Lead / Job Image File	6	File Extension: .bmp, .gif, .jpg, .jpeg, .png I ile Type: Job site photo
Sales Load / Job PDF File	7	Activity Types: Template File Extension: .pdf
	1	File Type: Customer drawing, Slab image
		Activity Types: Install
Sales Lead / Job PDF File	8	File Extensionpdf
		File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
Calendar Form - Warranty cal	10	Activity Types: Install
Concentral Fronti - Avententi y Cel	10	Print each form on a separate page

Activity Packets – Filter by Activity Type

Activity Packet - Field Crew Packet		
Fdit Packet Info		
Packet Name: Field Crew Packet Sequence: 1 Status: Active		
Adc 🗸		
Packet Name	Sequence 1	Filters
Sales Lead / Job Form - Job Summary		Activity Types: Template, Install, Repair
Sales Lead / Job Form - Countertop Details	2	Activity Types: Template, Install, Repair
Sales Lead / Job Issue Form - Job Issue	3	Activity Types. Template, Install Issue Statuses: Urgent, Open All Issue Categories
CC Quote I orm - Drawing & Layout (no prices)	2	Activity Types: Template Print each form on a separate page
Sales Lead / Job Image File	5	Activity Types: Template File Extension: .bmp, .glf, .jpg, .jpcg, .png File Type. Customer drawing, Stab image Max Width: 7.5 inches
Sales Lead / Job Image File	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png I ile Type: Job site photo
Sales Lcad / Job PDF File	7	Activity Types: Template File Extension: .pdf File Type: Customer drawing, Slab image
Sales Lead / Job PDF File	8	Activity Types: Install File Extensionpdf File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
Calendar Form - Warranty cal	10	Activity Types: Install Print each form on a separate page

Filter Attached Files

Account Sales Lead Job Calen	dar Rep	oort Admin Search Help
Activity Packet - Field Crew Packet		
Packet Name Field Crew Packet Sequence. 1 Status: Active		
Add 🗸		
Packet Name	Sequence 1	Filters
Sales Lead / Job Form - Job Summary	1	Activity Types: Template, Install, Repair
Sales Lead / Job Form - Countertop Details	2	Activity Types: Template, Install, Repair
Sales Lead / Job Issue Form - Job Issue	3	Activity Types: Template, Install Issue Statuses: Urgent, Open All Issue Categories
CC Quote I orm - Drawing & Layout (no prices)	4	Activity Types: Template Print each torm on a separate page
Sales Lead / Job Image File	1	Activity Types: Template File Extension: bmp_dif_ipd_ipcd_pnd File Type. Customer drawing, Stab image Max Width: 7.5 inches
Sales Lead / Job Image File	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png I ile Type: Job site photo
Sales Lead / Job PDF File	7	Activity Types: Template File Extension: .pdf File Type: Customer drawing, Slab image
Sales Lead / Job PDF File	8	Activity Types: Install File Extensionpdf File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
Calendar Form - Warranty cal	10	Activity Types: Install Print each form on a separate page

Label Attached Files

Files: Attach File				
File Name ↑	Description	File Type	Size	Date
amedeus02.jpg		Slab image	101 KB	12/20/2016 2:51:21 PM
pretend customer drawing.pdf		Customer drawing	178 KB	12/20/2016 2:51:40 PM
pretend signed contract.pdf		Signed contract	43 KB	12/20/2016 3:04:56 PM

Attach File	e To Job			×	
	Browse or drop files silestone_az [Add a Field]			<u>e]</u>	CAD Customer drawing Job site photo Material Info Shop drawing
		ОК	Cancel		Signed contract Slab image <new file="" type=""></new>

Create a File Custom Field

Account Sales Lea Job Settings	ad Job Calenc	lar Report	Admin	Search	H
Processes	File Custom Fields:	New File Custom	Field		
Templates	File Custom Fields all	ow vou to track Data Type	additional inf Description	ormation for each f	ïle
Custom Fields	File Type 1	List of values	Jeschpuon	Active	
Forms					
Form Sets					
Activity Types					
Activity Sets					
Activity Custom Fields					
Activity Statuses					
File Custom Fields					
Issue Categories					
Issue Forms					

Activity Packet – Shop Packet

		SHOP	PACKET		
Job Name: Lisa's Kitchen			Standard Job # S3122	:	
Assigned To: Ben	Activity Type: Fabrication	Phase:		Date: 2/14/2017	Time: 8:00am - 9:00am
Countertop Details	s - downstairs kito	chen			
Kitchen Material:	Color:		Sqft:		ge:
Kitchen Material: Granite	Uba Tuba		74	Be	vel
Kitchen Material: Granite Sink type:				Be	-
Kitchen Material: Granite Sink type: Undermount	Uba Tuba		74 Sink in stock:	Be	vel
Kitchen Material: Granite Sink type: Undermount Notes:	Uba Tuba Sink Model:		74 Sink in stock:	Be	vel
Kitchen Material: Granite Sink type: Undermount Notes: Countertop Details Room type:	Uba Tuba Sink Model:		74 Sink in stock:	Be	vel
Kitchen Material: Granite Sink type: Undermount Notes: Countertop Details Room type: Master bath	Uba Tuba Sink Model:		74 Sink in stock: yes	Be Fa	vel ucet info:
Room type: Kitchen Material: Granite Sink type: Undermount Notes: Countertop Details Room type: Master bath Material: Granite	Uba Tuba Sink Model: S - master bath		74 Sink in stock:	Be Fa	vel ucet info: ge:

Activity Packet

Edit Packet Info		
Packet Name: <u>Shop Packet</u> Sequence: 2 Status: Active		
Add 🗕		
Packet Name	Sequence ↑	Filters
Calendar Form - Shop Header	1	Activity Types: Fabrication
Sales Lead / Job Form - Countertop Details	2	Activity Types: Fabrication
Sales Lead / Job Image File	3	Activity Types: Fabrication File Extension: .bmpgif, .jpg, .jpeg, .png File Type: Job site photo, Slab image
Sales Lead / Job PDF File	4	Activity Types: Fabrication File Extension: .pdf File Type: Shop drawing
Sales Lead / Job CAD File	5	Activity Types: Fabrication File Extension: .dwg, .dxf Auto-Rotate Print each file on a separate page

Calendar Printable Form

alendar Settings	Calendar Printal	ale Forme:	New Printable Form	Import Form
Calendar Settings	Calendar Frintan	Sie Forms.	New Phillable Form	import i onn
Calendar Printable Forms	Calendar Printab own, or as part o		w you to tailor the c Packet.	lisplay of Activity
Activity Packets	Form Template	Sequence 1	Status	
	Form Template Shop Header	Sequence 1	Status Active	
Activity Packets Appointment Categories	Manager and the	Sequence 1 1 2		