



Calendar & Activity Packets

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

Account

Account

Account

Job

Job

Job

Job

Job

Job

Job

Job

Account

Job

Job

Phase

Phase

Activities

Forms

Files

Activities

Forms

Files

Activities

Forms

Account

Job

Job

Phase

Phase

Activities ✓

Forms

Files

Activities ✓

Forms

Files

Activities ✓

Forms

Most Calendars look like this...

Account Sales Lead Job Calendar Report Admin Search... Help CounterGo Sign Out :kathleen					
Calendar					
Options... Views Save View... New Appointment... Printable View...					
Activity Type: Template, Fabrication, Install, Repair					
Color Activities By: Activity Type					
Friday, February 10, 2017 Previous 30 days Next 30 days Go to Today					
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2/6/2017 (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
<p>Lowe's #620 Robert Cole S3014</p> <p>123 Main Street Dallas, TX 8:00am - 10:00am (2 hours) Silestone Star White 39 Cove Dupont yes</p> <p>Tearout - laminate Norm</p> <p>Norm</p>	<p>Home Depot #150 Leanna's kitchen S3186</p> <p>Leanna Smith 12345 Elm Magnolia 8:00am - 10:30am (2.5 hours) Silestone, Granite, Granite bamboo, luna pearl, uba tuba 98, 85, 35 Bevel, Bevel, Bevel yes</p> <p>Tearout - stone Marco</p> <p>Bob HOUSTON</p>	<p>Home Depot #150 Colleen's kitchen S3130</p> <p>Colleen Foley 1234 main 8:30am - 11:00am (2.5 hours) Silestone Ariel 77 3/8" Rounded no</p> <p>Marco</p> <p>Bob</p>	<p>Home Depot #150 Diana's Kitchen S3114</p> <p>213 Maple Unscheduled (2.5 hours)</p> <p>Marco</p> <p>Bob</p>	<p>ABC Builders, Inc. Gus's kitchen S3278</p> <p>Gus Foley 12810 Ivydale Dr Houston, TX 77049 Unscheduled (2.5 hours) Silestone Bamboo 68 Bullnose no Customer has sink Tearout - stone Unassigned confirm sink model, faucet info</p> <p>Emma</p>	
<p>Lowe's #620 Mike Jones S3025</p> <p>Jim Craig 2100 Valley Rd Mesquite, TX 75187 12:00pm - 2:30pm (2.5 hours) Granite Absolute Black 88 Waterfall no see layout No Tearout Norm</p> <p>Rob HOUSTON</p>	<p>Home Depot #150 Antonio's kitchen S3181</p> <p>Antonio Teodoro 123 Main 12:30pm - 3:00pm (2.5 hours) Granite, Granite uba tuba, blue 85, 45 Bevel</p> <p>Norm</p> <p>Bob DALLAS</p>	<p>Texas Kitchens Lydia Lorenz S3111</p> <p>Greg Bahnsen 102 E. Brenham Street Denton, TX 76210 10:30am - 1:00pm (2.5 hours) Silestone, Silestone White Diamond, Ariel 35, 80 Bevel, Bevel no, yes</p> <p>Tearout - tile Norm</p> <p>Emma</p>	<p>ABC Builders, Inc. The Bradbury Building S3072</p> <p>123 main street dallas, tx 8:00am - 12:00pm (4 hours) Granite Uba Tuba 225 Bullnose yes</p> <p>Norm I talked to Don...</p> <p>Bob</p>	<p>Katerina & Phil Jackson Katerina's kitchen S3276</p> <p>Katerina 100 Jackson Houston 8:00am - 10:30am (2.5 hours) Granite Cosmic grey 57 Ogee yes</p> <p>Tearout - laminate Norm Ask about doing powder room in bsement Change order - color</p> <p>HOUSTON</p>	



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

Account Sales Lead Job Calendar Report Admin Search... Help CounterGo Sign Out:kathleen					
Calendar					
Options... Views Save View... New Appointment... Printable View...					
Activity Type: Template, Fabrication, Install, Repair					
Color Activities By: Activity Type					
Friday, February 10, 2017 Previous 30 days Next 30 days Go to Today					
Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
2/6/2017 (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
<p>Lowe's #620 Robert Cole S3014</p> <p>123 Main Street Dallas, TX 8:00am - 10:00am (2 hours) Silestone Star White 39 Cove Dupont yes</p> <p>Tearout - laminate Norm</p> <p>Norm</p>	<p>Home Depot #150 Leanna's kitchen S3196</p> <p>Leanna Smith 12345 Elm Magnolia 8:00am - 10:30am (2.5 hours) Silestone, Granite, Granite bamboo, uba pearl, uba tuba 86, 85, 35 Bevel, Bevel, Bevel yes</p> <p>Tearout - stone Marco</p> <p>Bob HOUSTON</p>	<p>Home Depot #150 Colleen's kitchen S3130</p> <p>Colleen foley 1234 main 8:30am - 11:00am (2.5 hours) Silestone Ariel 77 3/8" Rounded no</p> <p>Marco</p> <p>Bob</p>	<p>Home Depot #150 Diana's Kitchen S3114</p> <p>213 Maple Unscheduled (2.5 hours)</p> <p>Marco</p> <p>Bob</p>	<p>ABC Builders, Inc. Gus's kitchen S3276</p> <p>Gus Foley 12810 Ivydale Dr Houston, TX 77049 Unscheduled (2.5 hours) Silestone Bamboo 68 Bullnose no Customer has sink Tearout - stone Unassigned confirm sink model, faucet info</p> <p>Emma</p>	
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Start with the Options Button

Account | Sales Lead | Job | Calendar | Report | Admin | Search

Calendar

Options... Views ▾ Save View... New Appointment... Printable View...

Activity Type: Template, Fabrication, Install, Repair
Color Activities by: Activity Type

Friday, February 10, 2017 | Previous 30 days | Next 30 days | Go to Today

Monday	Tuesday
<u>2/6/2017</u> (13 hours)	<u>2/7/2017</u> (25 hours)
Lowe's #620 Robert Cole S3014	Home Depot #150 Leanna's kitchen S3186
123 Main Street Dallas, TX 8:00am - 10:00am (2 hours) Silestone Star White 39 Cove Dupont	Leanna Smith 12345 Elm Magnolia 8:00am - 10:30am (2.5 hours) Silestone, Granite, Granite bamboo, luna pearl, uba tuba 98, 85, 35 Bevel, Bevel, Bevel

Select Activity Type – Install

Calendar - Options

Activity Types: Select... | Clear

Assigned To: Select... | Assign

Show activities where: Add Filter...

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals: Select... | Clear

Color Activities By:

Wrap Text:

Auto Refresh

Select Hold... | Clear

Account Name	X
Job Name	X
Standard Job #	X
Job Notes	X
Contact Name	X
Address	X
City, State Zip	X
Time Duration	X
Countertop Details - Material	X
Countertop Details - Color	X
Countertop Details - Soffit	X
Countertop Details - Edge	X
Countertop Details - Sink In stock	X
Countertop Details - Notes	X
Job Summary - Tearout	X
Assigned To	X
Activity Notes	X
Job Issues	X
Salesperson	X
Store Location	X

Display Fields
(Click X to remove fields)

OK Cancel



Select Activity Types

1 item selected Selected Only

Activity Type	Process	
	Sales Lead	Job
<input type="checkbox"/> Appointment	No	No
<input type="checkbox"/> Job Sold	Yes	Yes
<input type="checkbox"/> Collect Deposit (Inactive)	No	Yes
<input type="checkbox"/> Template	No	Yes
<input type="checkbox"/> Fabrication	No	Yes
<input checked="" type="checkbox"/> Install	No	Yes
<input type="checkbox"/> Invoice	No	Yes
<input type="checkbox"/> Repair	No	Yes
<input type="checkbox"/> Plumbing (Inactive)	No	Yes
<input type="checkbox"/> Finish (cabinets)	No	Yes
<input type="checkbox"/> New Sales Lead Created	Yes	No
<input type="checkbox"/> Walk In	Yes	No
<input type="checkbox"/> Call-In	Yes	No
<input type="checkbox"/> Outbound Cold Call	Yes	No
<input type="checkbox"/> Phone Call / Email Follow Up	Yes	No
<input type="checkbox"/> Followup Email (Inactive)	Yes	No
<input type="checkbox"/> Showroom visit (Inactive)	Yes	No
<input type="checkbox"/> Delivery	No	Yes
<input type="checkbox"/> Job In QB (Inactive)	No	Yes
<input type="checkbox"/> Lowe's call confirmation (Inactive)	Yes	No

(Rows 1 to 20 of 20)

OK Cancel

Clear fields & select *only* fields needed

Calendar - Options

Activity Types: Select... | Clear

Assigned To: Select... | Assign

Show activities where: Add Filter...

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals: Select... | Clear

Color Activities By:

Wrap text:

Auto Refresh

Select Holds... | Clear

Account Name	X
Job Name	X
Standard Job #	X
Job Notes	X
Contact Name	X
Address	X
City, State Zip	X
Time/Duration	X
Countertop Details - Material	X
Countertop Details - Color	X
Countertop Details - Soff	X
Countertop Details - Edge	X
Countertop Details - Sink in stock	X
Countertop Details - Notes	X
Job Summary - Tearout	X
Assigned To	X
Activity Notes	X
Job Issues	X
Salesperson	X
Store Location	X

Display Fields
(Click X to remove fields.)

OK Cancel

Select Calendar Fields

Use the (+) buttons to expand the tree. Click on a field name to add it to the report.

Selected Fields

Drag and drop fields to change the order. Click on the X to remove a field.

- Activity
 - Activity Type
 - Time
 - Duration
 - Time/Duration (in use)
 - Activity Status
 - Activity Notes
 - Assigned To (in use)
 - Test field (inactive)
 - Phase
 - Series
- Appointment
- Account
- Sales Lead
- Job
 - Job Name (in use)
 - Job Salesperson
 - Job Issues
 - Store Location
 - Standard Job #
 - Throughput
 - Division (inactive)
 - Customer type (inactive)
 - Job Number (inactive)
 - Job Notes
- Job Address
- Forms
 - Job Summary
 - Job Summary - tearout (in use)
 - Job Summary - Change order needed
 - Job Summary - Final Total \$
 - Job Summary - # Slabs Granite
 - Job Summary - # Slabs Silstone
 - Countertop Details
 - Countertop Details - Room type
 - Countertop Details - Material
 - Countertop Details - Color
 - Countertop Details - Soff

Job Name	X
Time/Duration	X
Assigned To	X
Job Summary - Tearout	X

OK Cancel

Install Calendar

Calendar - Options

Activity Types: [Select...](#) [Clear](#)

Assigned To: [Select...](#) [Myself](#)

Show activities where: [Add Filter...](#)

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals: [Select...](#) [Clear](#)

Color Activities By:

Wrap Text:

Auto Refresh

[Select Fields...](#) [Clear](#)

Display Fields: (Click X to remove fields.)

Job Name	X
Time/Duration	X
Assigned To	X
Job Summary Tearout	X

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help | CounterGo | Sign Out:kathleen

Calendar

Options... Views ▾ Save View... New Appointment... Printable View...

Activity Type: Install
Color Activities By: Activity Type

Monday, February 13, 2017 | Previous 30 days | Next 30 days | Go to Today

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 Unscheduled (4 hours) Unassigned No Tearout	Conner Dre 8:00am - 2:00pm (6 hours) Install Crew #1 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	
Jeff Cotes 8:00am - 12:00pm (4.5 hours) Install Crew #1 Tearout - laminate	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	
Sally Zurich 8:00am - 12:00pm (4 hours) Install Crew #2 No Tearout	Timothy's kitchen 1:00pm - 5:00pm (4 hours) Install Crew #2 Tearout - tile		Willy Hayes 12:30pm - 4:30pm (4 hours) Install Crew #2 No Tearout	Leanna's kitchen 1:00pm - 5:00pm (4 hours) Install Crew #2 Tearout - stone	
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)	2/25/2017
Clare Goode Unscheduled (4 hours) Install Crew #2	Reynaldo's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2	Kathleen'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: [Select...] [Clear]

Assigned To: [Select...] [Myself]

Show activities where:

Begin Date: [Calendar Icon]

Number of Days:

Display Type: (Rows by Columns) ←

Subtotals: [Select...] [Clear]

Color Activities By:

Wrap Text: Auto Refresh

Display Fields:
(Click X to remove fields.)

Time/Duration	X
Assigned To	X
Job Summary - Tearout	X

[OK] [Cancel]

Show only Installers & Unassigned

Calendar - Options

Activity Types:

Assigned To:

Show activities where:

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals:

Color Activities By:

Wrap Text:

Auto Refresh

Display Fields:

Job Name	<input type="button" value="X"/>
Time/Duration	<input type="button" value="X"/>
Assigned To	<input type="button" value="X"/>
Job Summary - Tearout	<input type="button" value="X"/>



Select Assignees

3 items selected Active Assignees Only

<input type="checkbox"/>	Assignee	Description
<input checked="" type="checkbox"/>	(Unassigned)	
<input type="checkbox"/>	Norm	
<input type="checkbox"/>	Marco	
<input type="checkbox"/>	Tull	
<input type="checkbox"/>	Ben	
<input type="checkbox"/>	Charlie	
<input checked="" type="checkbox"/>	Install Crew #1	
<input checked="" type="checkbox"/>	Install Crcw #2	
<input type="checkbox"/>	Jeff	
<input type="checkbox"/>	Nora	
<input type="checkbox"/>	Rey	Plumber
<input type="checkbox"/>	George	Plumber
<input type="checkbox"/>	Kathleen	
<input type="checkbox"/>	Clare	
<input type="checkbox"/>	Patrick	
<input type="checkbox"/>	Bob	
<input type="checkbox"/>	Stephanie	
<input type="checkbox"/>	Eric	
<input type="checkbox"/>	Jason	

(Rows 1 to 19 of 19)

Show Sq Ft on Calendar

Calendar - Options

Activity Types:

Assigned To:

Show activities where:

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals:

Color Activities By:

Wrap Text:

Auto Refresh

Display Fields:
(Click X to remove fields.)

Job Name	X
Time/Duration	X
Assigned To	X
Job Summary - Tearout	X



Select Subtotals

No items selected

Only show:
Field:
Activity Type:

First | Prev | Page 1 of 4 | Next | Last | (Rows 1 to 30 of 114)

<input type="checkbox"/>	Field	Activity Type
<input type="checkbox"/>	Throughput	Job Sold!
<input type="checkbox"/>	Throughput	Collect Deposit
<input type="checkbox"/>	Throughput	Template
<input type="checkbox"/>	Throughput	Fabrication
<input type="checkbox"/>	Throughput	Install
<input type="checkbox"/>	Throughput	Invoice
<input type="checkbox"/>	Throughput	Repair
<input type="checkbox"/>	Throughput	Plumbing
<input type="checkbox"/>	Throughput	Finish (cabinets)
<input type="checkbox"/>	Throughput	New Sales Lead Created
<input type="checkbox"/>	Throughput	Walk-In
<input type="checkbox"/>	Throughput	Call-In
<input type="checkbox"/>	Throughput	Outbound Cold Call
<input type="checkbox"/>	Throughput	Phone Call / E-mail Follow Up
<input type="checkbox"/>	Throughput	Followup Email
<input type="checkbox"/>	Throughput	Showroom Visit
<input type="checkbox"/>	Throughput	Delivery
<input type="checkbox"/>	Throughput	Job In QB
<input type="checkbox"/>	Throughput	Lowe's call confirmation
<input type="checkbox"/>	Sales Lead Info - Square Foot	Job Sold!



Show Sq Ft on Calendar

Calendar - Options

Activity Types:

Assigned To:

Show activities where:

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals:

Color Activities By:

Wrap Text:

Auto Refresh

Display Fields:
(Click X to remove fields.)

Job Name	X
Time/Duration	X
Assigned To	X
Job Summary - Tearout	X

Select Subtotals

No items selected

Only show:
Field:

Activity Type:

<input type="checkbox"/>	Field	Activity Type
<input type="checkbox"/>	Throughput	Install
<input type="checkbox"/>	Sales Lead Info - Square Feet	Install
<input type="checkbox"/>	Countertop Details - Sqft	Install
<input type="checkbox"/>	Job Summary - Final Total \$	Install
<input type="checkbox"/>	Job Summary - # Slabs Granite	Install
<input type="checkbox"/>	Job Summary - # Slabs Silestone	Install

(Rows 1 to 6 of 6)

Show Sq Ft on Calendar

Calendar - Options

Activity Types:

Assigned To:

Show activities where:

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals:

Color Activities By:

Wrap Text:


Auto Refresh

Display Fields:
 (Click X to remove fields.)

Job Name	X
Time/Duration	X
Assigned To	X
Job Summary - Tearout	X

Select Subtotals

1 item selected

Only show:
 Field: 
 Activity Type:

<input type="checkbox"/>	Field	Activity Type
<input type="checkbox"/>	Countertop Details - Sqft	Job Sold!
<input type="checkbox"/>	Countertop Details - Sqft	Collect Deposit
<input type="checkbox"/>	Countertop Details - Sqft	Template
<input type="checkbox"/>	Countertop Details - Sqft	Fabrication
<input checked="" type="checkbox"/>	Countertop Details - Sqft	Install
<input type="checkbox"/>	Countertop Details - Sqft	Invoice
<input type="checkbox"/>	Countertop Details - Sqft	Repair
<input type="checkbox"/>	Countertop Details - Sqft	Plumbing
<input type="checkbox"/>	Countertop Details - Sqft	Finish (cabinets)
<input type="checkbox"/>	Countertop Details - Sqft	New Sales Lead Created
<input type="checkbox"/>	Countertop Details - Sqft	Walk-In
<input type="checkbox"/>	Countertop Details - Sqft	Call-In

Now we can drag/drop

Calendar

Options... Views Save View... New Appointment... Printable View...					
Activity Type: Install					
Color Activities By: Activity Type					
Monday, February 13, 2017 Previous 5 days Next 5 days Go to Today					
Assignee	Monday 2/13/2017	Tuesday 2/14/2017	Wednesday 2/15/2017	Thursday 2/16/2017	Friday 2/17/2017
Unassigned	(4 hours) Countertop Details - Sqft - Install: 65 Barry Newcomb Unscheduled (4 hours) Unassigned No Tearout				
Install Crew #1	(9 hours) Countertop Details - Sqft - Install: 72 Jeff Cotes 8:00am - 12:30pm (4.5 hours) Install Crew #1 Tearout - laminate	(6 hours) Countertop Details - Sqft - Install: 207 Conner Dre 8:00am - 2:00pm (6 hours) Install Crew #1 No Tearout	(6 hours) Countertop Details - Sqft - Install: 78 Denise Turner 8:00am - 2:00pm (6 hours) Install Crew #1 No Tearout	(4 hours) Countertop Details - Sqft - Install: 130 Brigid's kitchen Unscheduled (4 hours) Install Crew #1	(4 hours) Countertop Details - Sqft - Install: 106 Wayne Richmond 8:00am - 12:00pm (4 hours) Install Crew #1 No Tearout
Install Crew #2	(4 hours) Countertop Details - Sqft - Install: 78 Sally Zurich 8:00am - 12:00pm (4 hours) Install Crew #2 No Tearout	(8 hours) Countertop Details - Sqft - Install: 178 Eddie's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - stone Timothy's kitchen 4 hours	(2 hours) Countertop Details - Sqft - Install: 45 Cyr's Kitchen 3:00pm - 5:00pm (2 hours) Install Crew #2 Tearout - laminate	(8 hours) Countertop Details - Sqft - Install: 218 Daniel's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - laminate Willy Hayes 12:30pm - 4:30pm (4 hours) Install Crew #2 No Tearout	(8 hours) Countertop Details - Sqft - Install: 215 Ann's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - stone Leanna's kitchen 1:00pm - 5:00pm (4 hours) Install Crew #2 Tearout - stone
	Monday, February 13, 2017 Previous 5 days Next 5 days Go to Today				

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
Color Activities B

Tuesday, March

Assignee

(Unassigned) Zander Contracting
Unscheduled (4 hours)

Save View

My View

Shared View Name:

Make this my default view

Account | Sales Lead | Job | Calendar | Report | Admin | Search

Calendar

Options... Views Save View... New Appointment... Printable View...

Activity Type: Search:

Assigned To:

Color Activities

Tuesday, March

Assignee

(Unassigned)

My Views		
Dallas fab with appt	[Make Default]	[Rename] X
Kathleen's installs and templates	[Make Default]	[Rename] X
Norm's View	[Make Default]	[Rename] X
Shared Views		
Standard View (default)		[Rename] X
1-Assignee by Day - Install Crews	[Make Default]	[Rename] X
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 Appointment... Printable View...							
Activity Type: Fabrication							
Color Activities By: Countertop Details - Material 							
Friday, February 10, 2017 Previous 2 days Next 2 days Go to Today							
Date	Job Name	Countertop Details - Color	Countertop Details - Sqft	Countertop Details - Edge	Countertop Details - Sink Model	Countertop Details - Notes	Job Issues
Friday 2/10/2017 Countertop Details - Sqft - Fabrication: 572	 Cheryl's kitchen	Luna Pearl	66	Bullnose	h234		 Rush - broke slab
	Dave Lydon	whitest white, caledonia	85, 31	Cove Dupont, Ogee	JKI90, abc898		
	Willy Hayes	Luna Pearl	79	Cove Dupont	jk456	Note cutout for trash	
	Nola's kitchen	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	kg456	see layout	
Saturday 2/11/2017							
Friday, February 10, 2017 Previous 2 days Next 2 days Go to Today							

What are we looking at?

Calendar - Options [X]

Activity Types: Fabrication [v] Select... [Clear] ←

Assigned To: [v] Select... [Myself]

Show activities where: Add Filter...

Begin Date: 2/10/2017 [calendar icon]

Number of Days: 2 [v]

Display Type: Day by Display Field [v] (Rows by Columns) ←

Subtotals: Countertop Details - Sqft - Fabrication Select... [Clear]

Color Activities By: Countertop Details - Material [v] ←

Wrap Text:

Auto Refresh

Select Fields... [Clear]

Display Fields:
(Click X to remove fields.)

Job Name	X
Countertop Details - Color	X
Countertop Details - Sqft	X
Countertop Details - Edge	X
Countertop Details - Sink Model	X
Countertop Details - Notes	X
Job Issues	X

OK Cancel

Color Activities By – Form

Calendar - Options

Activity Types:

Assigned To:

Show activities where:

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals:

Color Activities By:

Wrap Text:

Auto Refresh

Display Fields:

(Click X to remove fields.)

Countertop Details

Room type:
Master bath

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

Add Subtotal #Slabs

Calendar - Options

Activity Types: Fabrication

Assigned To: [Myself]

Show activities where:

Begin Date: 2/10/2017

Number of Days: 2

Display Type: Day by Display Field (Rows by Columns)

Subtotals: Countertop Details - Sqft - Fabrication

Color Activities By: Countertop Details - Material

Wrap Text:

Auto Refresh

Job Name	X
Countertop Details - Color	X
Countertop Details - Sqft	X
Countertop Details - Edge	X
Countertop Details - Sink Model	X
Countertop Details - Notes	X
Job Issues	X

Display Fields:
(Click X to remove fields.)

Select Subtotals

3 items selected

Only show:
Field:

Activity Type: Fabrication

<input type="checkbox"/>	Field	Activity Type
<input type="checkbox"/>	Throughput	Fabrication
<input type="checkbox"/>	Sales Lead Info - Square Feet	Fabrication
<input checked="" type="checkbox"/>	Countertop Details - Sqft	Fabrication
<input type="checkbox"/>	Job Summary - Final Total \$	Fabrication
<input checked="" type="checkbox"/>	Job Summary - # Slabs Granite	Fabrication
<input checked="" type="checkbox"/>	Job Summary - # Slabs Silestone	Fabrication

(Rows 1 to 6 of 6)

Filter by Location

Calendar - Options

Activity Types:

Assigned To:

Show activities where:

Begin Date:

Number of Days:

Display Type: (Rows by Columns)

Subtotals:

Color Activities By:

Wrap Text:

Auto Refresh

Job Name	<input type="checkbox"/>
Countertop Details - Color	<input type="checkbox"/>
Countertop Details - Sqft	<input type="checkbox"/>
Countertop Details - Edge	<input type="checkbox"/>
Countertop Details - Sink Model	<input type="checkbox"/>
Countertop Details - Notes	<input type="checkbox"/>
Job Issues	<input type="checkbox"/>

Display Fields:
(Click to remove fields.)

Filter Activities

Filter Type:
 Account Field
 Process
 Job Field
 Activity
 Form
 Appointment Field

Job Fields:

Job Name
Job Status
Job Creation
Job Salesperson
Job Notes
Store Location
Standard Job #
Division (Inactive)
Customer Type (Inactive)
Job Number (Inactive)
Throughput

Color Activities By:

Wrap Text:

Auto Refresh

Job Name	<input type="checkbox"/>
Countertop Details - Color	<input type="checkbox"/>
Countertop Details - Sqft	<input type="checkbox"/>
Countertop Details - Edge	<input type="checkbox"/>
Countertop Details - Sink Model	<input type="checkbox"/>
Countertop Details - Notes	<input type="checkbox"/>
Job Issues	<input type="checkbox"/>

Display Fields:
(Click to remove fields.)

Filter by Location

The screenshot shows a dialog box titled "Filter Activities" with a close button in the top right corner. On the left, under "Filter Type", the "Job Field" radio button is selected. On the right, under "Job Fields", the "Store Location" dropdown is open, showing a list of values: "Value", "(None)", "DALLAS", "HOUSTON", and "COLLEGE STATION". The "DALLAS" option is checked and highlighted in yellow, with a red arrow pointing to it. Below the list, there are "OK" and "Cancel" buttons.

Filter Type	Job Fields
<input type="radio"/> Account Field	Store Location
<input type="radio"/> Process	<input checked="" type="radio"/> is <input type="radio"/> is not one of the following (check all that apply)
<input checked="" type="radio"/> Job Field	<input type="checkbox"/> Value
<input type="radio"/> Activity	<input type="checkbox"/> (None)
<input type="radio"/> Form	<input checked="" type="checkbox"/> DALLAS
<input type="radio"/> Appointment Field	<input type="checkbox"/> HOUSTON
	<input type="checkbox"/> COLLEGE STATION

Fabrication To Do List – Dallas

Calendar

Options... Views Save View... New Appointment... Printable View...							
Activity Type: Fabrication							
Filters: Store Location is DALLAS							
Color Activities By: Countertop Details - Material							
Friday, February 10, 2017 Previous 2 days Next 2 days Go to Today							
Date	Job Name	Countertop Details - Color	Countertop Details - Sqft	Countertop Details - Edge	Countertop Details - Sink Model	Countertop Details - Notes	Job Issues
Friday 2/10/2017	Cheryl's kitchen	Luna Pearl	66	Bullnose	h234		Rush - broke slab
	Willy 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 Appointment... Printable View...

Activity Type: Appointment, Template
Assigned To: (Unassigned), Norm, Marco
Color Activities By: Activity Type

Monday, February 13, 2017 | Previous 14 days | Next 14 days | Go to Today

Date	Unscheduled	8am	9am	10am	11am	12pm
Monday 2/13/2017 (Unassigned)	Gus's kitchen Houston, TX 555-889-6565					
Monday 2/13/2017 Norm	Katerina's kitchen Houston 555-555-6548 Change order - color			Joey Austin's Kitchen Houston, TX 555-565-8989		
Monday 2/13/2017 Marco				Smelton Jones Blandtown, KY 494-234-4234		
Tuesday 2/14/2017 (Unassigned)						
Tuesday 2/14/2017 Norm				Margie's kitchen		
Tuesday 2/14/2017 Marco	Cory Smith			Eileen's kitchen Irving, TX 972-445-9812		

Calendar - Options

Activity Types: Appointment, Template [Select...] [Clear]

Assigned To: (Unassigned), Norm, Marco [Select...] [Myself]

Show activities who: Add Filter...

Begin Date: 2/13/2017

Number of Days: 14

Display Type: Day & Assignee by Time (Rows by Columns)

Expand hours from 8 am to 5 pm

Subtotals: [Select...] [Clear]

Color Activities By: Activity Type

Wrap Text:

Auto Refresh

Select Fields... [Clear]

Display Fields:
(Click X to remove fields.)

Job Name	X
City, State	X
Phone 1	X
Job Issues	X

OK Cancel

Drag & Drop

Calendar

Options... Views Save View... New Appointment... Printable View...

Activity Type: Appointment, Template
Assigned To: (Unassigned), Norm, Marco
Color Activities By: Activity Type

Monday, February 13, 2017 | Previous 14 days | Next 14 days | Go to Today

Date	Unscheduled	8am	9am	10am	11am	12pm	1pm	2pm	3pm	4pm	5pm
Monday 2/13/2017 (Unassigned)	Gus's kitchen Houston, TX 666-889-6666										
Monday 2/13/2017 Norm		Katerina's kitchen Houston 555-555-8548 Change order - color			Joey Austin's Kitchen Houston, TX 555-565-0969				Gus's kitchen Houston, TX 555-089-6665		
Monday 2/13/2017 Marco				Smelton Jones Houston, TX 666-234-4234						Bob Lee Houston, TX 666-665-9989	
Tuesday 2/14/2017											

Mapping Activities



Mapping

Calendar

Options... Views ▾ Save View... New Appointment... Printable View...

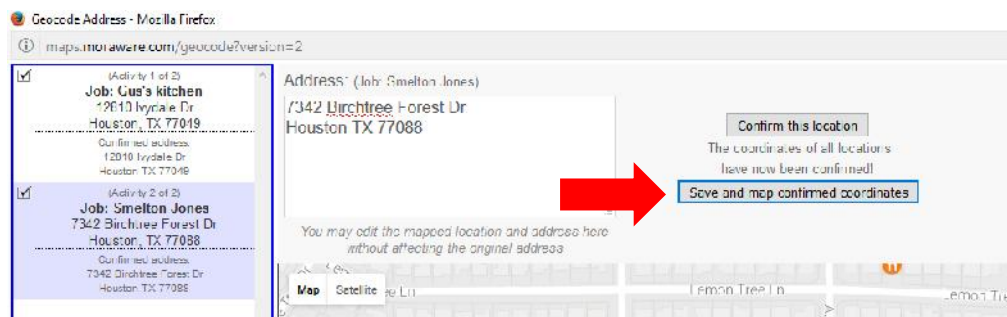
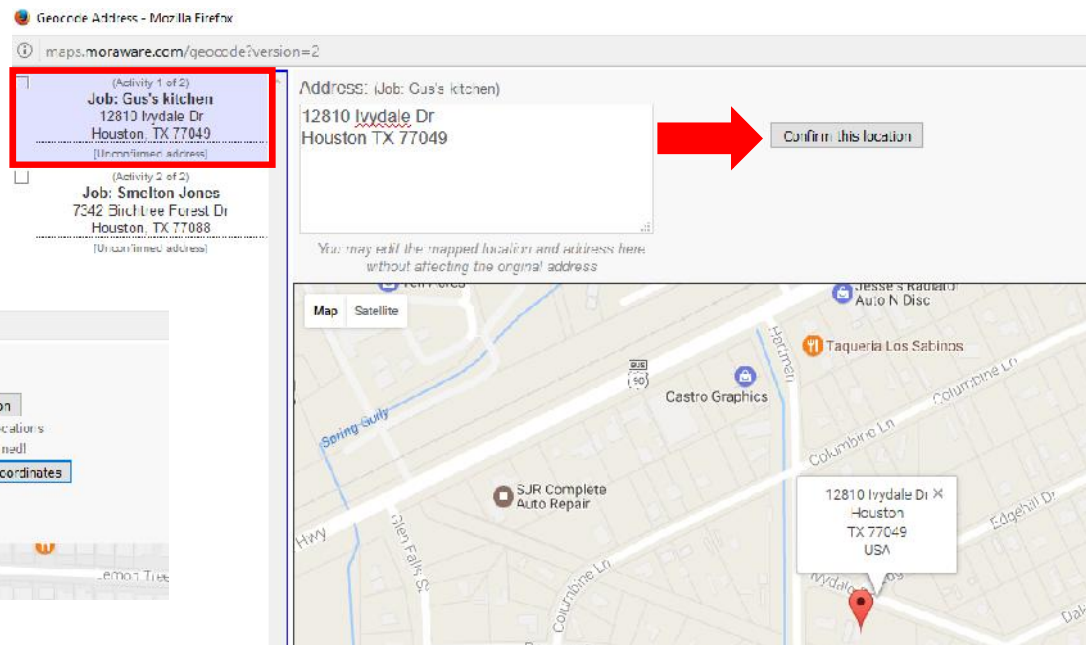
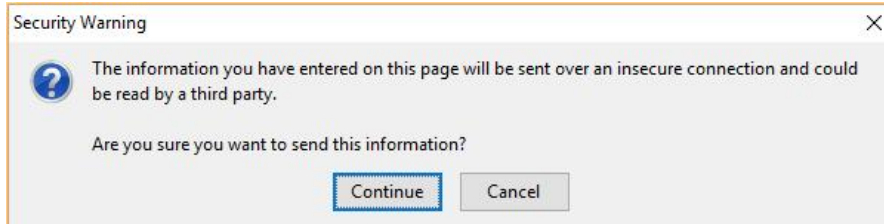
Activity Type: Appointment, Template
Assigned To: (Unassigned), Norm, Marco
Color Activities By: Activity Type

Monday, February 13, 2017 | Previous 14 days | Next 14 days | Go to Today

Date	Unscheduled	8am		9am		10am		11am		12pm		1pm
		:00	:30	:00	:30	:00	:30	:00	:30	:00	:30	
Monday 2/13/2017 (Unassigned)	Gus's kitchen Houston, TX 555-889-6565											
Monday 2/13/2017 Norm		Katerina's kitchen Houston 555-6548 Change order - color					Joey Austin's Kitchen Houston, TX 555-565-8989					
Monday 2/13/2017 Marco						Smelton Jones Blandtown, KY 494-234-4234						
Tuesday 2/14/2017												

Printable View...
Insert Sales Lead Activity...
Insert Job Activity...
New Appointment...
Map Activities for 2/13/2017...

Launches Google Maps



Maps by Assignee

Mapped Activities - Mozilla Firefox

maps.moraware.com/mapActivities?version=2

Alex (Collapse all assignees) (Hide all)

- Unassigned** (1 activity) (Hide)
- Template:** (2.5 hours)
Account: ABC Builders, Inc.
Job: Gus's kitchen
12810 Ivydale Dr
Houston, TX 77049

Norm (2 activities) (Hide)

- Template:** 8:00 AM (2.5 hours)
Account: Katerina & Phil Jackson
Job: Katerina's kitchen
100 Jackson
Houston
- Template:** 11:00 AM (2.5 hours)
Trip distance(lg): 14.1 mi
Trip duration(lg): 22 mins
Account: Joey Austin
Job: Joey Austin's Kitchen
1824 Spring St.
Houston, TX

Marco (2 activities) (Hide)

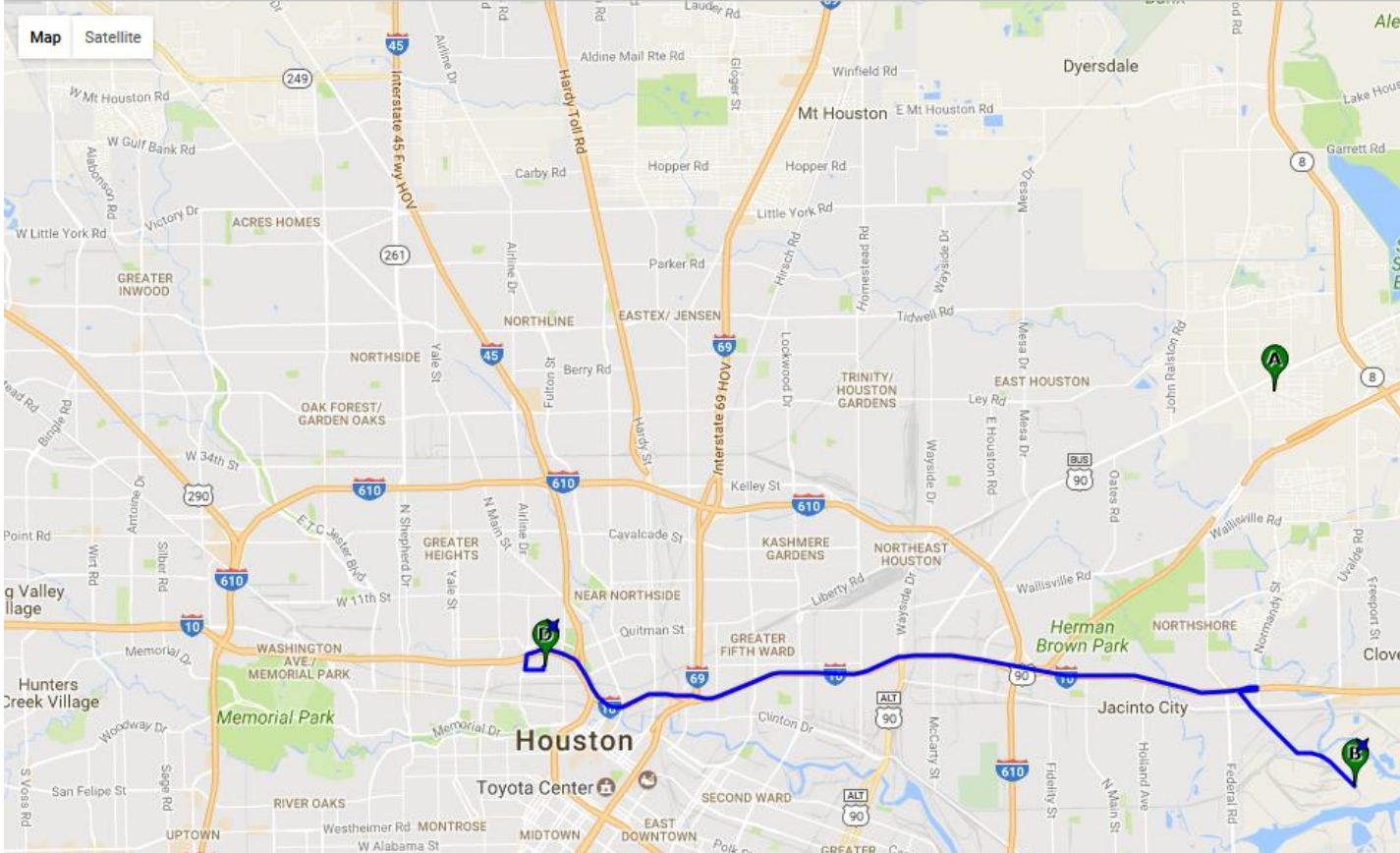
- Template:** 10:00 AM (2.5 hours)
Account: Best Kitchens, Inc.
Job: Smelton Jones
7342 Birchtree Forest Dr
Houston, TX 77088
- Template:** 3:30 PM (1.5 hours)
Trip distance(lg): 8.6 mi
Trip duration(lg): 16 mins
Account: Zander Contracting
Job: Bob Lee
1014 Wirt Rd.
Houston, TX 77055

Show/Hide Assignee

Mapped Activities - Mozilla Firefox

maps.moraware.com/mapActivities?version=2

Map Satellite



Map details: (Collapse all assignees) (Hide all)

Unassigned (1 activity) (Hide)

- Template:** (2.5 hours)
Account: ABC Builders, Inc.
Job: Gus's kitchen
12810 Ivydale Dr
Houston, TX 77049

Norm (2 activities) (Hide)

- Template:** 8:00 AM (2.5 hours)
Account: Katerina & Phil Jackson
Job: Katerina's kitchen
100 Jackson
Houston

- Template:** 11:00 AM (2.5 hours)
Trip distance(lg): 14.1 mi
Trip duration(lg): 22 mins
Account: Joey Austin
Job: Joey Austin's Kitchen
1824 Spring St.
Houston, TX

Marco (2 activities) (Show)

Activity Packets



Calendar

Options... Views ▾ Save View... New Appointment... Printable View...																			
Activity Type: Appointment, Template																			
Assigned To: (Unassigned), Norm, Marco																			
Color Activities By: Activity Type																			
Monday, February 13, 2017 Previous 14 days Next 14 days Go to Today																			
Date	Unscheduled	8am :00	:30	9am :00	:30	10am :00	:30	11am :00	:30	12pm :00	:30	1pm :00	:30	2pm :00	:30	3pm :00	:30	4pm :00	:30
Monday 2/13/2017 (Unassigned)																			
Monday 2/13/2017 Norm		Kareina's kitchen Houston 656-655-8548 ? Change order - color					Joey Austin's Kitchen Houston, TX 655-636-8089					Gus's kitchen Houston, TX 656-980-6666							
Monday 2/13/2017 Marco						Smeton Jones Houston, TX 656-234-4234											Rob Lee Houston, TX 656-656-8089		

Confirm Details

View Printable Calendar [X]

Date: [Calendar Icon]

Activity Types:

Assigned To:

Number of Days:

Page Breaks: [v]

Job Activity Packet: [v]

Calendar Form: [v]

Print As: PDF
 HTML

Page Breaks


View Printable Calendar [X]

Date: 2/13/2017 [Calendar Icon]

Activity Types: Appointment, Template [Select...] [Clear]

Assigned To: (Unassigned), Norm, Marco [Select...] [Clear]

Number of Days: 1

Page Breaks: after each Assignee [v] 

Job Activity Packet: (None) [v]
after each Assignee [v]

Calendar Form: after each Activity [v]

Print As: after each Form

HTML

OK Cancel

Choose Packet (set up in advance)

View Printable Calendar [X]

Date: 2/13/2017 [Calendar Icon]

Activity Types: Appointment, Template [Select...] [Clear]

Assigned To: (Unassigned), Norm, Marco [Select...] [Clear]

Number of Days: 1

Page Breaks: after each Assignee [v]

Job Activity Packet: Field Crew Packet [v]

Calendar Form: Field Crew Packet

Print As: Shop Packet


<New Activity Packet>

HTML

OK Cancel

Compiled Activity Packets

Page: 1 of 28 Automatic Zoom



555-555-3585
Fax: 888-555-1212
info@domain.com
www.domain.com

JOB SUMMARY FORM

Job Name: Katerina's kitchen	Standard Job #: S3276
Job Address: Katerina 100 Jackson Houston 555-555-6548	Account Contact: Phil 555-555-7741 cell

Template Details:

Phase	Date	Sched. Time	Assigned To	Notes
	2/13/2017	8:00am - 10:30am	Norm	Ask about doing powder room in bsement

For each Activity on the Calendar

Page: 6 of 28

555-555-3585
Fax: 888-555-1212
info@domain.com
www.domain.com

Company Name
Tagline here

JOB SUMMARY FORM

Job Name: Joey Austin's Kitchen	Standard Job #: S3073
---	--

Job Address: Joe & Donna Austin 1824 Spring St. Houston, TX 555-565-8989 555 622-7898 cell joey@domain.com	Account Contact:
---	-------------------------

Template Details:

Phase	Date	Sched. Time	Assigned To	Notes
	2/13/2017	11:00am - 1:30pm	Norm	confirm slab images; ask about laundry room

Install Details:


Phase	Date	Sched. Time	Assigned To	Notes
	3/1/2017	8:00am - 12:00pm	Install Crew #2	Flexible re date but must be before 1/25. Confirm 3 days advance.

Job Checklist

CHECK ALL BOXES BEFORE FABRICATION!

Deposit received: <input checked="" type="checkbox"/>	Tearout: Tearout - laminate	Change order needed:	
Final Total \$: \$5,300.00	Final quote approved: <input checked="" type="checkbox"/>	# Slabs Granite: 2	# Slabs Silestone:

Include Open/Urgent Issues

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

History:

kathleen (12/12/2016 2:46:49 PM)

Created
Subject: laundry
Status: Open
Category: Change order

kathleen (1/19/2017 8:36:53 AM)

Changed subject to "color"

Include CounterGo Quote Drawing

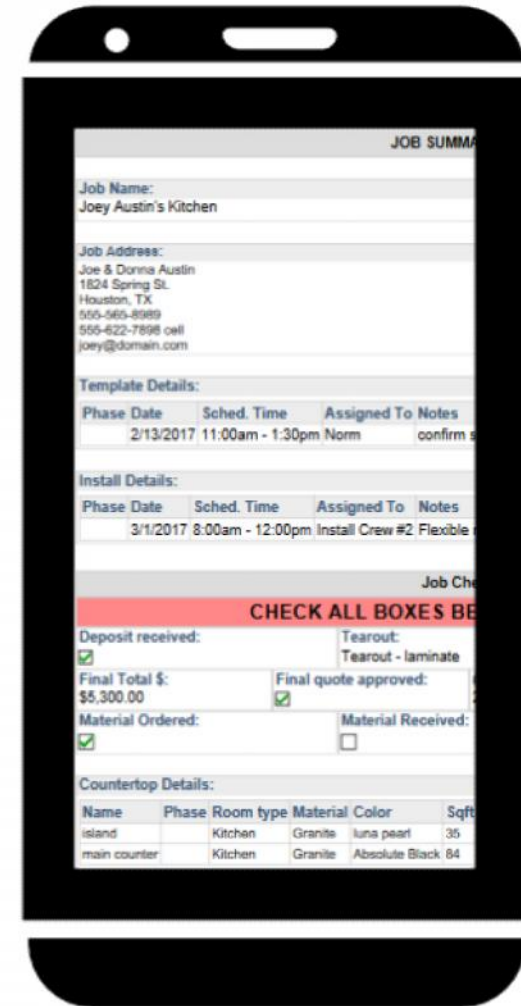
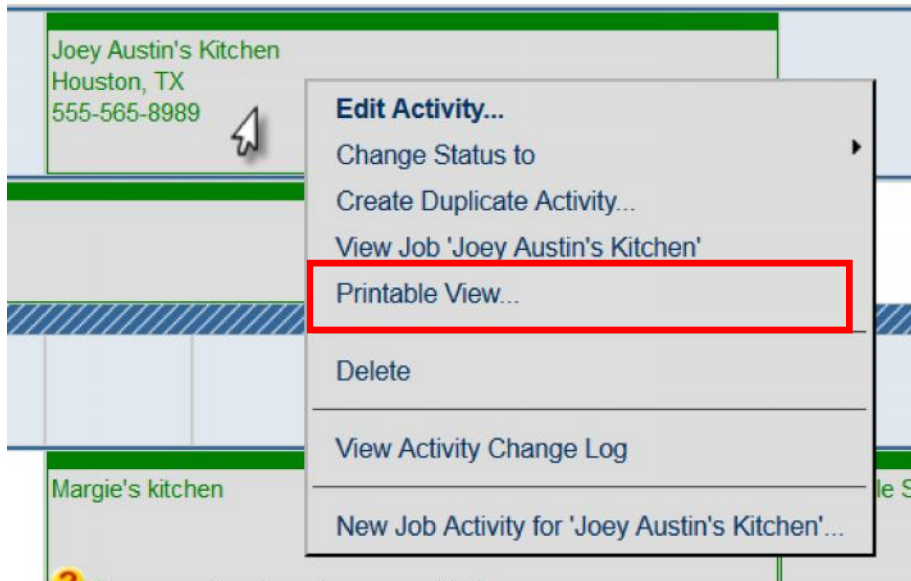
Quote Name: Katerina's kitchen	Revision: 3
Account Name: Katerina & Phil Jackson Katerina	Project Address: Katerina 100 Jackson Houston
JOB DETAILS	
Drawing:	
<p>— Unfinished ○ Cove</p>	

Include Attached Files



(but only the ones you want)

Mobile Devices



Calendar Settings

Calendar | Report | Admin


New Appointment...

View Calendar

 Edit Settings

Account | Sales Lead | Job | Calendar | Report | Admin

Calendar Settings

 Calendar Settings

Calendar Printable Forms

Activity Packets

Appointment Categories

Holidays

Activity Packets: New Activity Packet...

Packet Name	Sequence ↑	Status
<u>Field Crew Packet</u>	1	Active
<u>Shop Packet</u>	2	Active
<u>Warehouse</u>	3	Inactive

Activity Packets

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help

Activity Packet - Field Crew Packet 

Full Packet Info...

Packet Name: Field Crew Packet
 Sequence: 1
 Status: Active

Add

Packet Name	Sequence ↑	Filters
<u>Sales Lead / Job Form - Job Summary</u>	1	Activity Types: Template, Install, Repair
<u>Sales Lead / Job Form - Countertop Details</u>	2	Activity Types: Template, Install, Repair
<u>Sales Lead / Job Issue Form - Job Issue</u>	3	Activity Types: Template, Install Issue Statuses: Urgent, Open All Issue Categories
<u>CG Quote Form - Drawing & Layout (no prices)</u>	4	Activity Types: Template Print each form on a separate page
<u>Sales Lead / Job Image File</u>	5	Activity Types: Template File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Customer drawing, Slab image Max Width: 7.5 inches
<u>Sales Lead / Job Image File</u>	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Job site photo
<u>Sales Lead / Job PDF File</u>	7	Activity Types: Template File Extension: .pdf File Type: Customer drawing, Slab image
<u>Sales Lead / Job PDF File</u>	8	Activity Types: Install File Extension: .pdf File Type: CAD, Shop drawing
<u>Page Break</u>	9	Activity Types: Install
<u>Calendar Form - Warranty.ca</u>	10	Activity Types: Install Print each form on a separate page

(ROWS 1 TO 10 OF 10)

Activity Packets – Filter by Activity Type

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help

Activity Packet - Field Crew Packet 

Full Packet Info...

Packet Name: Field Crew Packet
 Sequence: 1
 Status: Active

Adc ▾

Packet Name	Sequence ↑	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
CG Quote Form - Drawing & Layout (no prices)	4	Activity Types: Template Print each form on a separate page
Sales Lead / Job Image File	5	Activity Types: Template File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Customer drawing, Slab image Max Width: 7.5 inches
Sales Lead / Job Image File	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png File 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 Extension: .pdf File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
Calendar Form - Warranty.ca	10	Activity Types: Install Print each form on a separate page

(ROWS 1 TO 10 OF 10)

Filter Attached Files

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help

Activity Packet - Field Crew Packet ←

Full Packet Info...

Packet Name: Field Crew Packet
Sequence: 1
Status: Active

Add ▾

Packet Name	Sequence ↑	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
CG Quote Form - Drawing & Layout (no prices)	4	Activity Types: Template Print each form on a separate page
Sales Lead / Job Image File	5	Activity Types: template File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Customer drawing, Slab image Max Width: 7.5 inches
Sales Lead / Job Image File	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png File 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 Extension: .pdf File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
Calendar Form - Warranty.ca	10	Activity Types: Install Print each form on a separate page

(ROWS 1 TO 10 OF 10)

Label Attached Files

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 To Job [X]

File: No file selected.

or drop files here

silestone_azul_ugarit.gif (453.52KB)

File Type: [v] ←

- CAD
- Customer drawing
- Job site photo
- Material Info
- Shop drawing
- Signed contract
- Slab image
- <New File Type>

Create a File Custom Field

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help

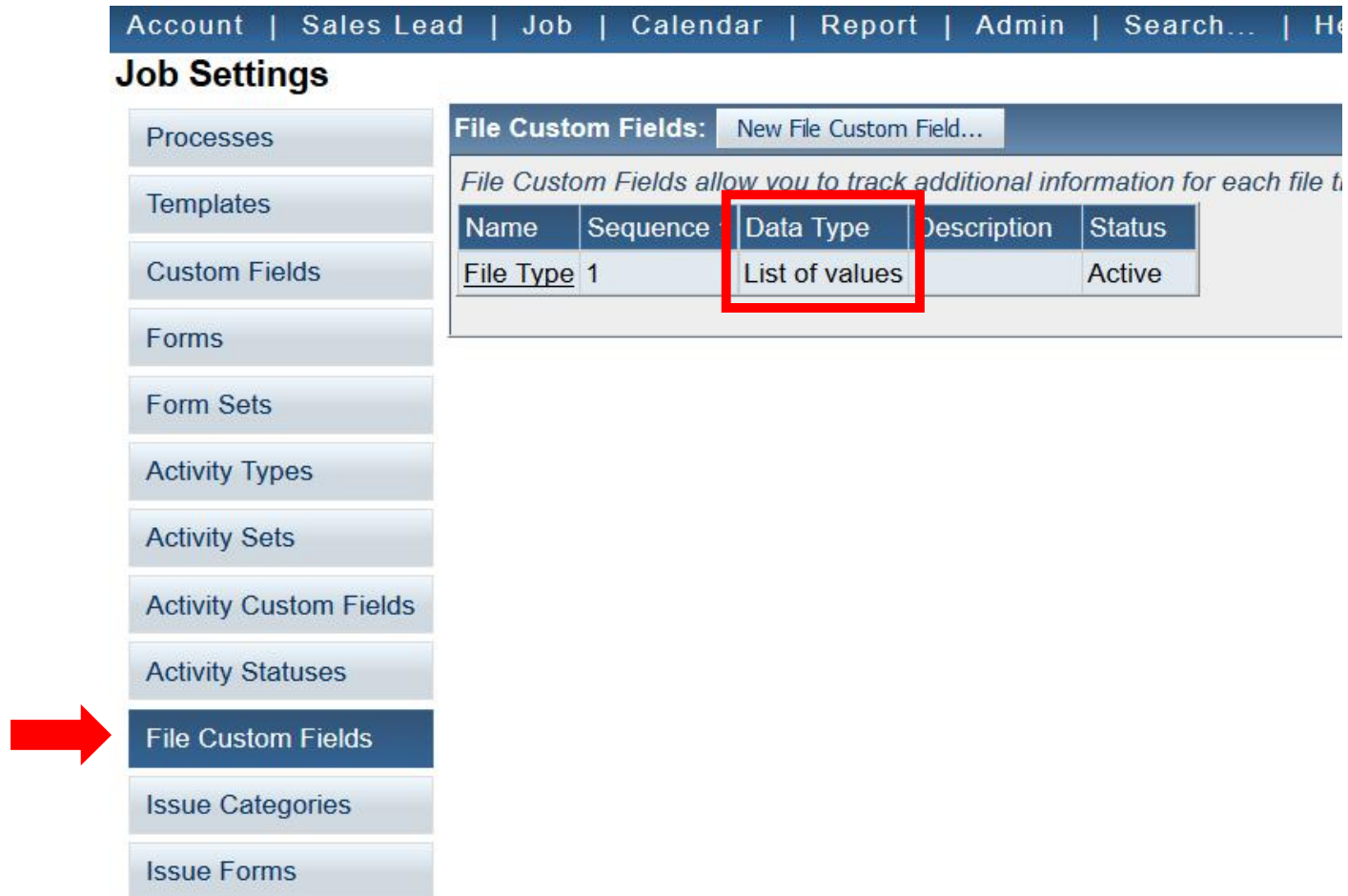
Job Settings

- Processes
- Templates
- Custom Fields
- Forms
- Form Sets
- Activity Types
- Activity Sets
- Activity Custom Fields
- Activity Statuses
- File Custom Fields**
- Issue Categories
- Issue Forms

File Custom Fields: New File Custom Field...

File Custom Fields allow you to track additional information for each file type.


Name	Sequence	Data Type	Description	Status
<u>File Type</u>	1	List of values		Active



Activity Packet – Shop Packet

Page: 3 of 6

Automatic Zoom



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

Activity Notes:

Countertop Details - downstairs kitchen

Room type:
Kitchen

Material: Granite	Color: Uba Tuba	Sqft: 74	Edge: Bevel
Sink type: Undermount	Sink Model:	Sink in stock: yes	Faucet info:

Notes:

Countertop Details - master bath

Room type:
Master bath

Material: Granite	Color: Baltic Brown	Sqft: 32	Edge: Bevel
Sink type: Undermount	Sink Model:	Sink in stock: no	Faucet info:

Activity Packet

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | He

Activity Packet - Shop Packet

Edit Packet Info...

Packet Name: Shop Packet

Sequence: 2

Status: Active

Add ▾

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

Calendar Printable Form

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | H

Calendar Settings

Calendar Settings

Calendar Printable Forms

Activity Packets

Appointment Categories

Holidays

Calendar Printable Forms: New Printable Form... Import Form...

Calendar Printable Forms allow you to tailor the display of Activity info on your calendar, either as a separate page, or as part of an Activity Packet.

Form Template	Sequence ↑	Status
<u>Shop Header</u>	1	Active
<u>Warranty cal</u>	2	Active
<u>Material Info</u>	3	Active