



# 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 &amp; 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

# Or maybe 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

Date	Unschedule	8am :00	:30	9am :00	:30	10am :00	:30	11am :00	:30	12pm :00	:30	1pm :00	:30	2pm :00	:30
	<p>Home Depot #150 Brigid's kitchen S3212</p> <p>Brigid Foley 12345 main</p> <p>Unscheduled (4 hours) Granite, Granite, green, blue 55, 45 Bevel, Bullnose</p> <p>Unassigned</p> <p>Bob COLLEGE STATION</p>	<p>Lowe's #620 Jeff Cotes S3000</p> <p>Jim Craig 2100 Valley Rd Mesquite, TX 75187 8:00am - 12:30pm (4.5 hours) Granite</p> <p>Santa Cecilia Gold 72 3/8" Rounded yes</p> <p>Tearout - laminate Install Crew #1</p> <p>Emma DALLAS</p>										<p>Home Depot #150 Nola's kitchen S3205</p> <p>Nola Teodoro 12345 Main</p> <p>1:00pm - 5:30pm (4.5 hours) Silestone, Silestone black, blue 55, 89 Bevel, Ogee no, yes</p> <p>No Tearout Tuli pay special attention to seam location</p> <p>Bob DALLAS</p>			
	<p>ABC Builders, Inc. Gus's kitchen S3278</p> <p>Gus Foley 12810 Ivydale Dr Houston, TX 77049</p> <p>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>Zander Contracting Sally Zurich S3002</p> <p>Ernest Dargen 5000 Alpha Road Farmers Branch, TX 75244 8:00am - 12:00pm (4 hours) Granite blue 78 Ogee</p> <p>No Tearout Install Crew #2</p> <p>Norm HOUSTON</p>										<p>Max Construction Conner Dre S3061</p> <p>Steve Janaszak 784 Jamison Rd. Piano, TX 75094 1:00pm - 5:30pm (4.5 hours) Granite, Granite, Silestone, Granite luna pearl, absolute black, Ariel, santa Cecilia 50, 44, 78, 35 Cove Dupont, Bevel, Cove Dupont, Bevel no, no, no, yes</p> <p>No Tearout Install Crew #1</p> <p>Rob HOUSTON</p>			
		<p>Home Depot #150</p>										<p>Zander Contracting Revu Newcomb</p>			

# 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>	
<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 86 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 &amp; 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>	

# 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:

(Click X to remove fields.)



**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 Feet	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
	Conner Dre 1:00pm - 5:30pm (4.5 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	(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	(8 hours) Countertop Details - Sqft - Install: 215 Ann's kitchen 8:00am - 12:00pm (4 hours) Install Crew #2 Tearout - stone
		Timothy's kitchen 4 hours		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
Monday, February 13, 2017   Previous 5 days   Next 5 days   Go to Today					



# 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	ktg456	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 [Select...] [Clear] ←

Assigned To: [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**

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



# Add Subtotal #Slabs

**Calendar - Options**

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

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

Show activities where: [Add Filter...]

Begin Date: 2/10/2017 [Calendar Icon]

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	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.)

OK Cancel

**Select Subtotals**

3 items selected [Selected Only]

Only show:  
Field: [Dropdown]

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)

OK Cancel



# 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.)

# 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







# Mapping Activities



# 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

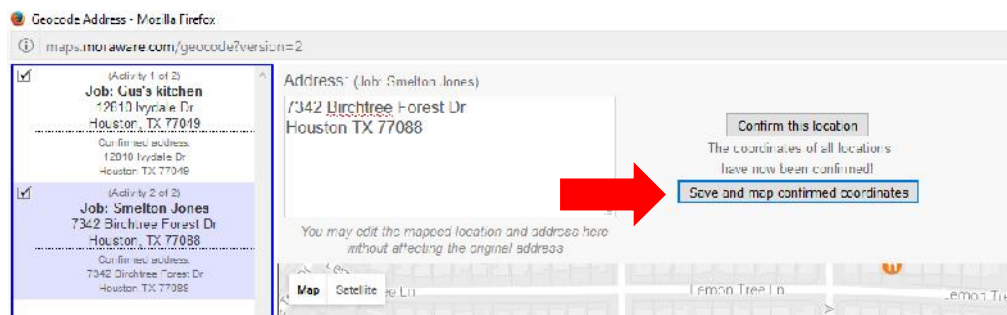
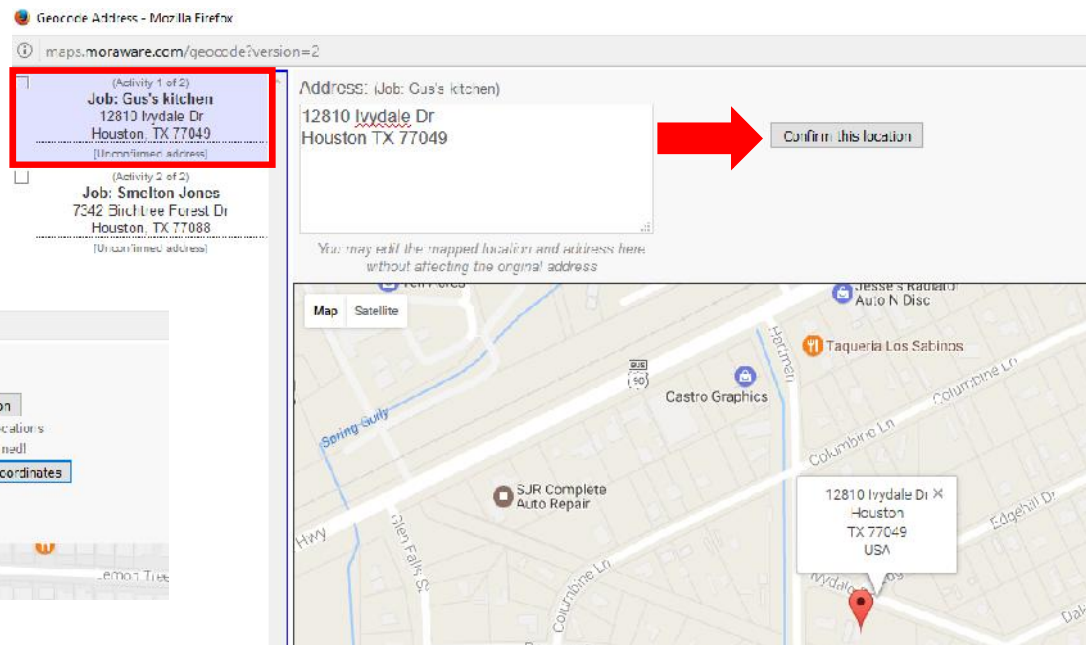
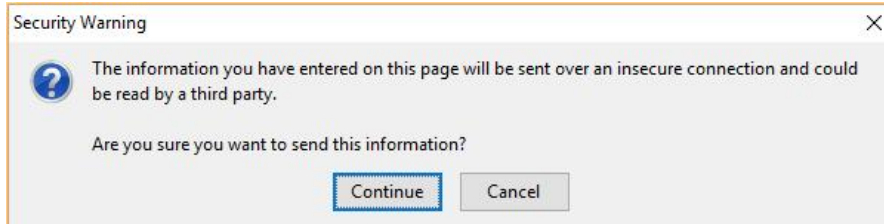
Monday, February 13, 2017 | Previous 14 days | Next 14 days | Go to Today

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

The map displays several activity routes in different colors: purple, blue, and green. A red arrow points to a location in the east part of Houston, near the intersection of Interstate 69 and Interstate 10.

**Assignee: 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

**Assignee: 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

**Assignee: Marco** (2 activities) (Hide)

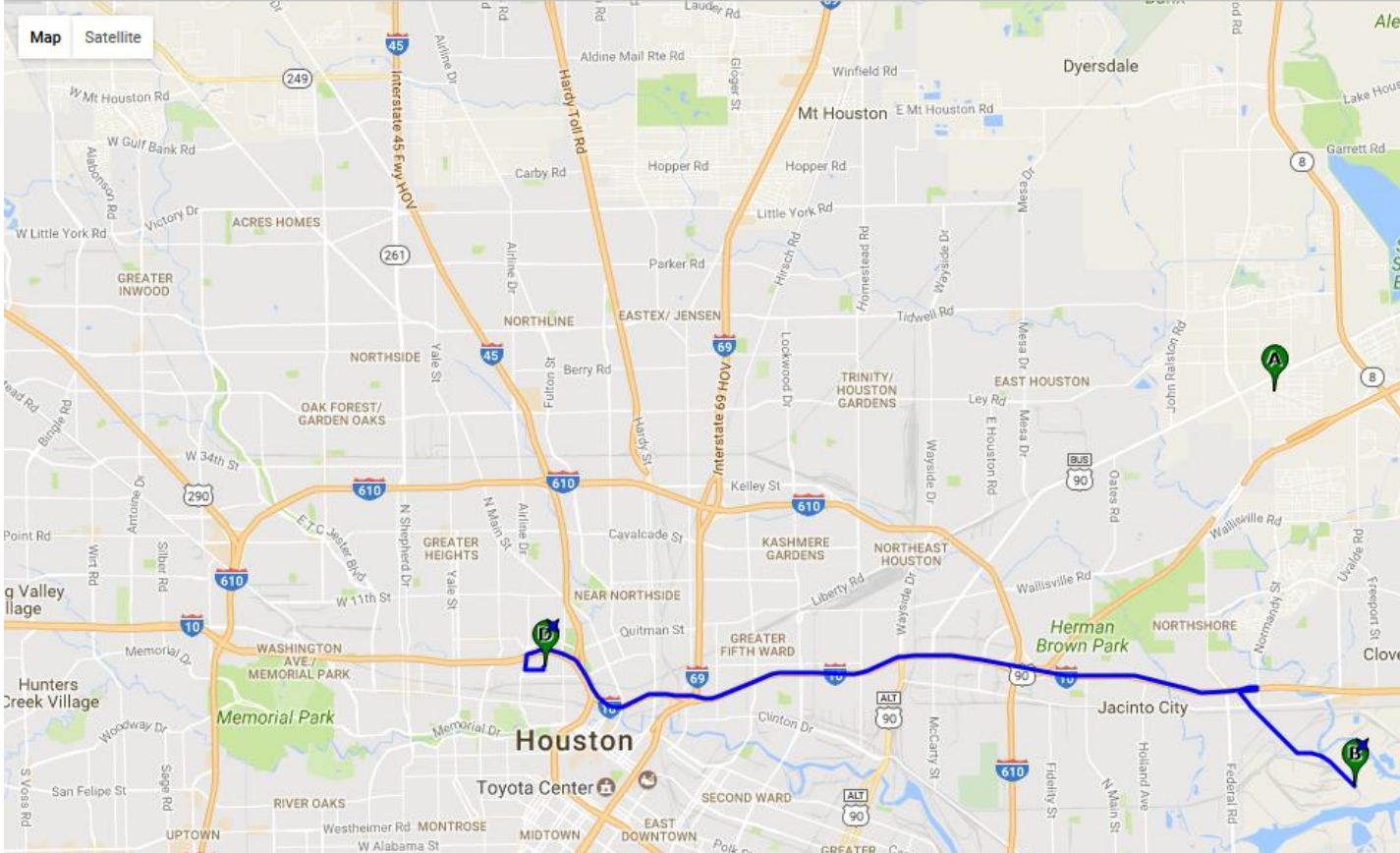
- Template:** 10:00 AM (2.5 hours)  
Account: Best Kitchens, Inc.  
Job: Smelton Jones  
7342 Birchtree Forest Dr  
Houston, TX 77088
- Template:** 3:30 PM (1.5 hours)  
Trip distance(lg): 8.6 mi  
Trip duration(lg): 16 mins  
Account: Zander Contracting  
Job: Bob Lee  
1014 Wirt Rd.  
Houston, TX 77055

# 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... <b>Printable View...</b>																			
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

<b>Job Name:</b> Katerina's kitchen	<b>Standard Job #:</b> <b>S3276</b>
<b>Job Address:</b> Katerina 100 Jackson Houston 555-555-6548	<b>Account Contact:</b> 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

<b>Job Name:</b> Joey Austin's Kitchen	<b>Standard Job #:</b> <b>S3073</b>
---	--

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

**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!**

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

# Include Open/Urgent Issues

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

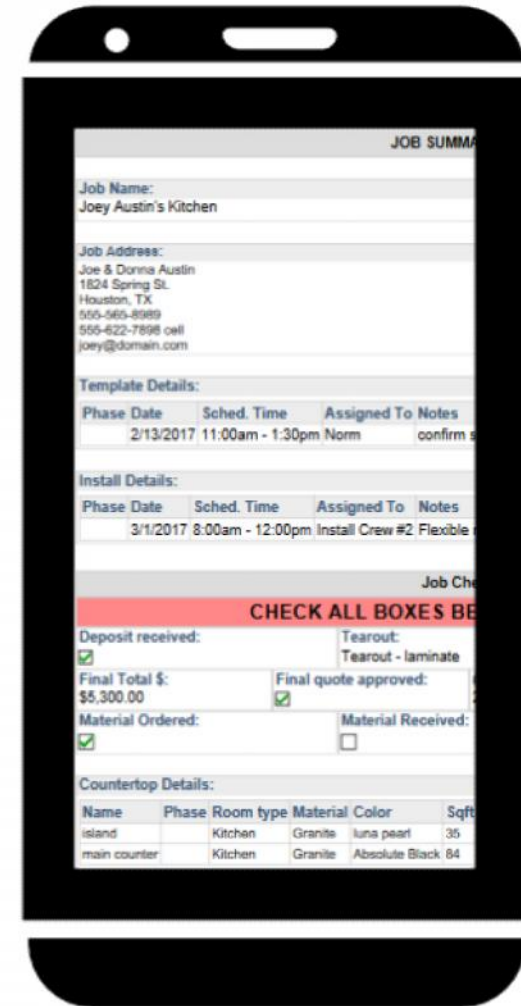
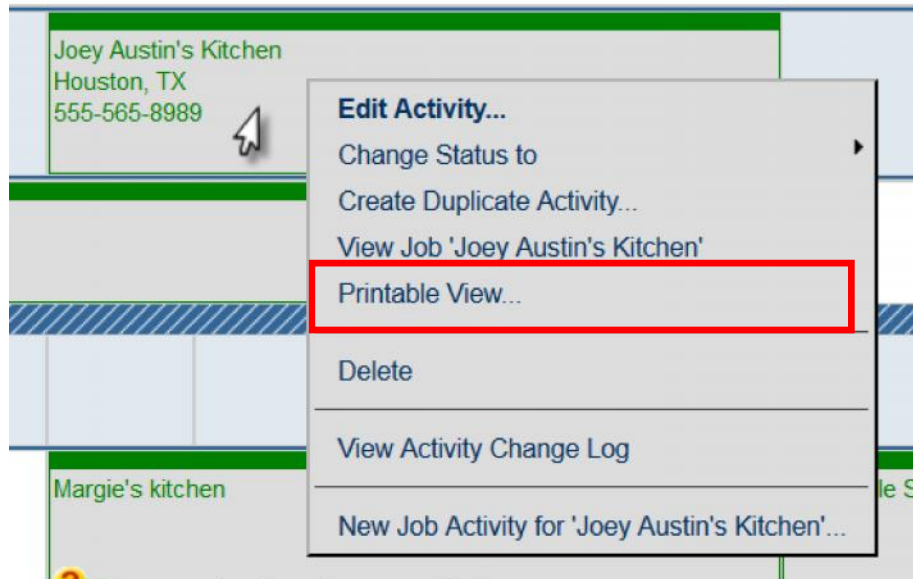
<b>Quote Name:</b> Katerina's kitchen	<b>Revision:</b> 3
<b>Account Name:</b> Katerina & Phil Jackson Katerina	<b>Project Address:</b> Katerina 100 Jackson Houston
<b>JOB DETAILS</b>	
<b>Drawing:</b>	
<p>The drawing shows a kitchen counter layout with the following dimensions and features:</p> <ul style="list-style-type: none"><li><b>Main Counter:</b> 140" long and 51" high.</li><li><b>Left End:</b> 25 1/2" wide.</li><li><b>Right End:</b> 25 1/2" high.</li><li><b>Inner Section:</b> 114 1/2" long.</li><li><b>Island:</b> 65" wide and 30" high, with two sinks.</li><li><b>End Section:</b> 65" wide and 30" high.</li></ul> <p><b>Legend:</b></p> <ul style="list-style-type: none"><li>Unfinished (indicated by a slash symbol)</li><li>Cove (indicated by a circle with a horizontal line)</li></ul>	

## 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 &amp; 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
Page Break	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

Asc ▼

Packet Name	Sequence ↑	Filters
<a href="#">Sales Lead / Job Form - Job Summary</a>	1	Activity Types: Template, Install, Repair
<a href="#">Sales Lead / Job Form - Countertop Details</a>	2	Activity Types: Template, Install, Repair
<a href="#">Sales Lead / Job Issue Form - Job Issue</a>	3	Activity Types: Template, Install Issue Statuses: Urgent, Open All Issue Categories
<a href="#">CG Quote Form - Drawing &amp; Layout (no prices)</a>	4	Activity Types: Template Print each form on a separate page
<a href="#">Sales Lead / Job Image File</a>	5	Activity Types: Template File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Customer drawing, Slab image Max Width: 7.5 inches
<a href="#">Sales Lead / Job Image File</a>	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Job site photo
<a href="#">Sales Lead / Job PDF File</a>	7	Activity Types: Template File Extension: .pdf File Type: Customer drawing, Slab image
<a href="#">Sales Lead / Job PDF File</a>	8	Activity Types: Install File Extension: .pdf File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
<a href="#">Calendar Form - Warranty.ca</a>	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
<a href="#">Sales Lead / Job Form - Job Summary</a>	1	Activity Types: Template, Install, Repair
<a href="#">Sales Lead / Job Form - Countertop Details</a>	2	Activity Types: Template, Install, Repair
<a href="#">Sales Lead / Job Issue Form - Job Issue</a>	3	Activity Types: Template, Install Issue Statuses: Urgent, Open All Issue Categories
<a href="#">CG Quote Form - Drawing &amp; Layout (no prices)</a>	4	Activity Types: Template Print each form on a separate page
<a href="#">Sales Lead / Job Image File</a>	5	Activity Types: template File Extension: .bmp, .gif, .jpg, .jpeg, .png <b>File Type: Customer drawing, Slab image</b> Max Width: 7.5 inches
<a href="#">Sales Lead / Job Image File</a>	6	Activity Types: Install File Extension: .bmp, .gif, .jpg, .jpeg, .png File Type: Job site photo
<a href="#">Sales Lead / Job PDF File</a>	7	Activity Types: Template File Extension: .pdf File Type: Customer drawing, Slab image
<a href="#">Sales Lead / Job PDF File</a>	8	Activity Types: Install File Extension: .pdf File Type: CAD, Shop drawing
Page Break	9	Activity Types: Install
<a href="#">Calendar Form - Warranty.ca</a>	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
<a href="#">amedeus02.jpg</a>		Slab image	101 KB	12/20/2016 2:51:21 PM
<a href="#">pretend customer drawing.pdf</a>		Customer drawing	178 KB	12/20/2016 2:51:40 PM
<a href="#">pretend signed contract.pdf</a>		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

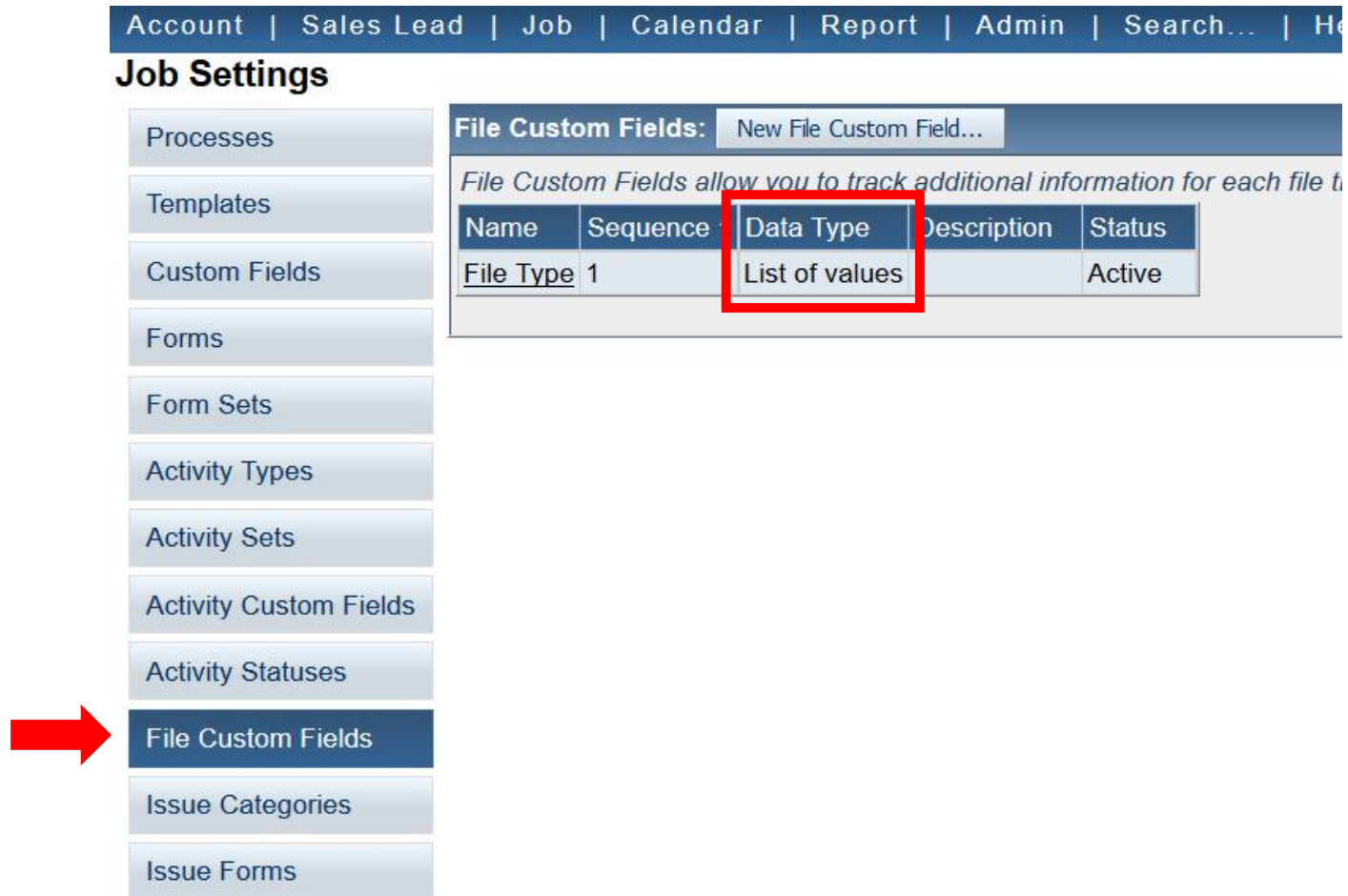
## Job Settings

- 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

<b>Job Name:</b> Lisa's Kitchen		<b>Standard Job #:</b> S3122		
<b>Assigned To:</b> Ben	<b>Activity Type:</b> Fabrication	<b>Phase:</b>	<b>Date:</b> 2/14/2017	<b>Time:</b> 8:00am - 9:00am

**Activity Notes:**

---

### Countertop Details - downstairs kitchen

**Room type:**  
Kitchen

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

**Notes:**

---

### Countertop Details - master bath

**Room type:**  
Master bath

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



# 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 information, 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

