



# ServiceTracker User Guide

**Version 2.0 | 03/01/2017 | ©2014-2017 ServiceTracker**

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## ServiceTracker Overview

ServiceTracker is a full end-to-end business software solution, including streamlined quote and order management, and real-time contract and pricing management. Customer Services teams and labour planners have full visibility of what's happening in the field and know exactly the location of all field staff with fully integrated scheduling and mobile workforce optimisation using intuitive drag and drop screens and fully interactive calendars

The ServiceTracker field service mobile app allows users to update service visits or create electronic service sheets / log books / Inspections which can be automatically sent to the customer upon completion.

Contracts, billing and one-off quotes are all integrated to ensure invoices are created and dispatched at the earliest opportunity. ServiceTracker can then be fully integrated to all core financial systems.

Follow-up Task creation and scheduling is easy together with the creation of service actions for new issues discovered while on-site and knowledge base searches if help is required.

Customers can have access to their own online portal account via ServiceTracker's online Communities and they can be automatically informed of any recommendations or non-conformances in real time to ensure there are never any surprises following a customer field service visit.

ServiceTracker is also a Revenue Management and ERP solution providing a holistic view of both the customer and internal resources through effortless reporting.

The standardised use of one application running across the entire business ensures increased efficiencies are realised as well as decreasing total cost of ownership (TCO) so that leadership will quickly see the benefit of reducing operational costs and improving company profitability.

## ServiceTracker Definitions

**User** – Username, password and profile of a licenced ServiceTracker user

**Resource** – A member of staff or piece of equipment that can be associated with a Visit

**Resource Category** – The financial details of any given resource (Cost and Charge)

**Skill** – Certifications, licenses and training details for a specific resource

**Service Territory** – A method of grouping Clients and Resources for Servicing

**Products / Price Books** – The products, services and customer specific pricing for any items that are sold/provided

**Client** - Competitor, Customer, Subcontractor, Partner and Prospect Addresses

**Contact** – Individuals who Work at an Account

**Inspection Item** – Any Item to be inspected as part of a Service Contract.

**Contract/Job** – A written agreement for services provided to a customer

**Schedule** – Specific details of any services to be carried out as part of the Contract

**Schedule Item** – Inspection items specifically related to a schedule of work

**Visit** – Details, dates, record assignment, completion history of visits that are carried out as part of a Service

**Inspection** – Details of any Inspection Items that are inspected as part of a visit.

**Action** – Actions to be completed if required from each inspection or visit

**Quote/Invoice/WO** – Service Quotations, Invoice management and Work Orders

**Report** – Access to data stored in ServiceTracker

**Dashboard** – Visual representation of data collected and stored in ServiceTracker

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## 1. ServiceTracker Setup and Configuration


### 1.1 Creating New Users

To setup new users, profiles and roles, please see Salesforce Help and Documentation pages. [https://help.salesforce.com/htviewhelpdoc?err=1&id=admin\\_users.htm&siteLang=en\\_US](https://help.salesforce.com/htviewhelpdoc?err=1&id=admin_users.htm&siteLang=en_US)

### 1.2 Creating Skills


- From the **All Tabs** menu (+ on the tab bar) click on the Skills Icon  **Skills** to access the skills view
- Click New
- Enter a Skill Name and select a correct Type from the picklist (See standard Salesforce documentation for picklist editing)


 Skill Edit  
New Skill




Skill Edit	
<div>Save Save &amp; New Cancel</div>	
Information	
Skill Name <input type="text"/>	Type  --None--
<div>Save Save &amp; New Cancel</div>	

- Click Save

### 1.3 Creating Service Territories


- From the All Tabs menu click on the Service Territories Icon  **Service Territories** to access the Service Territories view
- Click New
- Enter a Service Territory Name, Territory Description and Parent Territory if applicable


 Service Territory Edit  
New Service Territory

Service Territory Edit	
<div>Save Save &amp; New Cancel</div>	
Information	
Territory Name <input type="text"/>	Owner Mike Day
Territory Description  <input type="text"/>	Parent Territory  <input type="text"/> 
<div>Save Save &amp; New Cancel</div>	

- Click Save

## 1.4 Creating Resources with Skills and Service Territories

- From the All Tabs menu click on the Resources Icon  Resources to access the Resources view
- Click New
- Enter a Resource Name
- Enter a User Name (if you are not setting up a sub-contractor or equipment)
- Enter a Service Territory

 Resource Edit  
**New Resource**

---

**Resource Edit** Save Save & New Cancel

**Information**

Resource Name	<input type="text"/>	Owner	Mike Day
User	<input type="text" value="User"/>	Status	<input type="text" value="Available"/>
Service Territory	<input type="text"/>		

- Click Save

## 1.5 Creating Resource Categories

- From the new Resource detail page click the New Resource Category button

Resource Categories					
			New Resource Category		Resource Categories Help ?
Action	Resource Category Number	Category Name	Charge Unit	Cost Rate	Charge Rate
<a href="#">Edit</a>   <a href="#">Del</a>	RC-000000	Technician	Hour	£70.00	£100.00

- Enter a Category Name (i.e. Standard Service), Select a Charge Unit from the picklist (See standard Salesforce documentation for picklist editing), enter a Charge Rate and a Cost Rate

### Resource Category Edit New Resource Category

<b>Resource Category Edit</b>		<a href="#">Save</a>	<a href="#">Save &amp; New</a>	<a href="#">Cancel</a>
<b>Information</b>				
Resource	<input type="text" value="Mike Day"/>		Charge Unit	<input type="text" value="--None--"/>
Category Name	<input type="text"/>		Charge Rate	<input type="text"/>
			Cost Rate	<input type="text"/>
		<a href="#">Save</a>	<a href="#">Save &amp; New</a>	<a href="#">Cancel</a>

- Click Save

## 1.6 Creating Products & Pricebooks

To add new products and pricebooks please see to the Salesforce Help and Documentation pages

[https://help.salesforce.com/htviewhelpdoc?err=1&id=products\\_overview.htm&siteLang=en\\_US](https://help.salesforce.com/htviewhelpdoc?err=1&id=products_overview.htm&siteLang=en_US)  
for more information



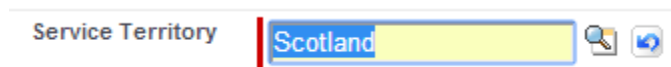
## 2. Creating New Clients

### 2.1 Create a Client with a Service Territory and Pricebook

To create a Client (or standard Salesforce records), please see the standard Salesforce Help and Documentation pages

[https://help.salesforce.com/htviewhelpdoc?err=1&id=account\\_overview.htm&siteLang=en\\_US](https://help.salesforce.com/htviewhelpdoc?err=1&id=account_overview.htm&siteLang=en_US)

When the Account has been created, select a Service Territory and Pricebook from the lookup on the Client detail page



### 2.2 Create a Contact

To create a new Contact please see to the Salesforce Help and Documentation pages

[https://help.salesforce.com/htviewhelpdoc?err=1&id=contacts\\_edit.htm&siteLang=en\\_US](https://help.salesforce.com/htviewhelpdoc?err=1&id=contacts_edit.htm&siteLang=en_US)

### 2.3 Create Inspection Items

- From the Client detail page click on the New Inspection Item button to create a single Service Item or click the Add Multiple\* button to create multiple records at once

Inspection Items										
		New Inspection Item		Add Multiple		Edit Selected		Inspection Items Help ?		
Action	Sort Order	Number	Master Type	Item Type	Location	Reference	Inspection Interval	Inspection Frequency	Next Inspection Date	Status
<input type="checkbox"/>   Edit   Del	1	A-001624	Water Treatment and Delivery	Calorifier	Basement Level	CAL1	1	Monthly	31/12/2016 13:45	Active
<input type="checkbox"/>   Edit   Del	2	A-001625	Water Treatment and Delivery	Cold Water Storage Tank	Loft Space	CWST	3	Monthly	22/07/2016 08:10	Active
<input type="checkbox"/>   Edit   Del	3	A-	Water Treatment and	Hot and Cold Water	Gate	HC1	1	Monthly	31/12/2016 13:45	Active

- Select the Correct Record Type (if applicable) then select from the Master Type picklist, Item Type picklist and Make picklist (see Salesforce Help and Documentation for assistance on creating new picklist items)
- Enter any additional details, the Location, Serial Number, Inspection Interval, Inspection Frequency, Anniversary date and any Grace Days required.

**Inspection Item Edit** [Save] [Save & New] [Cancel]

**Information** I = Required Information

Site I Milton Hotel - Manchester

Location I

Reference I

Serial Number I

Master Type I Water Treatment and Delivery ▼

Item Type I Cooling Tower ▼

Make I --None--

Material I

BlowDown Valve I --None-- ▼

Destratification Pump Fitted I --None-- ▼

Cold Water Make-Up I

Ball Valve Details I

Create Call Out I ☐

**Additional Details** I

Access Details I

Dimensions I

Cold Water Feed Size I

Hot Water Supply Size I

Hot Water Return Size I

Temperature Gauge Location I

Heat Source I --None-- ▼

Supplementary Heating I

Status I Active ▼

Linked Item I

Record Type Water Cooling Tower

Sort Order I

- Click Save

You can edit all Inspection Items by selecting the Inspection Items from the list and clicking the Edit All button

\* Screens may vary from Single and Multiple record insert

### 3. Create a Contract/Job & Schedule

#### 3.1 Create Contracts and schedules

##### Part 1 - Creating the Contract

- From the Client detail page (you must create the client first), go to the Contracts/Jobs section of ServiceTracker and click the Create New button

▼ ServiceTracker

Contracts / Jobs Schedules Visits Location									
<input type="radio"/> All Active <input type="radio"/> Active Contracts <input type="radio"/> Active Jobs <input type="radio"/> Show All Inactive									
Active Contracts / Jobs									
<a href="#">Create New</a>									
Action	Number	Reference	Notes	Type	Value	Start Date	End Date	Invoiced?	
<a href="#">Edit</a>   <a href="#">Del</a>	002854		Monthly L8 Monitoring	Contract	£0.00	01/12/2016			<input type="checkbox"/>
<a href="#">Edit</a>   <a href="#">Del</a>	002836	PO12345		Job	£0.00	01/11/2016			<input type="checkbox"/>

- Enter the Service Type, Customer Reference (if applicable), Start Date, End Date (if applicable), Special Instructions, Signed By name, Signed by Date, Review Date and Cancellation notice period. (see Salesforce Help and Documentation for editing picklist values)

**New Contract / Job**

Save Cancel

Record Type

Billing Account

Customer Reference

Type

Start Date

Status

End Date

Special Instructions

Signed by

Signed Date

Review Date

Cancellation Notice Period

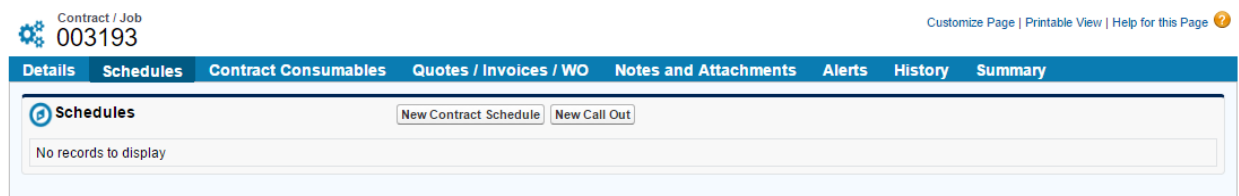
Save Cancel

- Click Save

NB: You can add more detail to the contract such as Invoicing details, consumables, portal sharing rules etc. by editing the Contract once it has been created

## Part 2 - Create the Schedule

- Once you have created the new Contract / Job, go to the schedules tab within the new contract record and click one of the “New” buttons to create the schedule (these buttons will change depending on the contract type)



- Enter the details of the new schedule, including the frequency (a drop down list of date ranges) and the interval (the corresponding number to work with the frequency) together with any mandatory fields. Here are some tips:
  - Schedule Owner** – This is the resource that is responsible for completing the visits. You can assign the schedule owner to a sub-contractor or a queue depending on how you have created your resources
  - Schedule Start Date** – This is the date of the first visit
  - Product** – This is taken from your product table and will be created at the setup/config stage. The product determines the price of the schedule and is taken from the pricebook on the client record
  - Schedule Range** – This is only applicable when Monthly or Weekly is selected. You can choose the months or days of the week that any visits will be scheduled
  - Time Allocation** - This is the time you would expect a visit to be completed. It can be changed at a later date if required
  - First Visit Number** – This should be set to the current visit number if working with a calendar year. i.e. visit “7” of 12 if starting in July
  - Schedule From** – The options here are to create the next visit from either the original planned date, the due date (if changed from the planned date) or the completed date
  - Full Schedule** – This means all visits will be created when the record is saved. If you do not select this, only one visit will be created and the system will automatically generate the next visit upon completion
  - Add Inspection Items** – This keeps adding any Inspection items from the account into the schedule and therefore the visits

**Details**

Site:

Schedule Owner:

Type:  Business Type:

Contact Name:  P.O. Number:

Schedule Start Date:  Product:

Schedule Interval:  Schedule Frequency:

Schedule Range: Available: Jan, Feb, Mar, Apr, May Chosen:

Time Allocation (M):  Schedule From:

First Visit Number:  Value:

Full Schedule: ☐ Add Inspection Items: ☐

- Click Save or Save and New to enter additional services for the Service Contract

NB: You can use the Inspection Items list at the bottom of the page as a guide to ensure you create a correct Service Schedule

Inspection Items							
Master Type	Item Type	Location	Inspection Interval	Inspection Frequency	Next Inspection Date	Status	Current State
Fire Safety Equipment	Fire Extinguisher	door	3	Monthly	01/12/2016 12:14	Active	
Water Treatment and Delivery	Calorifier	Basement Level	1	Monthly	31/12/2016 13:45	Active	

**The Contract, Schedule and Associated visits have now been created and assigned to the Schedule Owner ready for completion or planning.**

### 3.2 Create Alerts

- From the Contract/Job screen or the Schedule screen click the Alerts Tab and click New Alert

The screenshot shows the 'Alerts' tab selected in the top navigation bar. Below the tabs, there is a 'New Alert' button and a message 'No records to display'.

- Enter the Name of the person who will receive the Service Contract Alerts (you will need to create the contact record first as per 2.2) and Check any required boxes to state the type of Alert they will receive.

The screenshot shows the 'New Alert' form. It has a title 'Alert Edit' and buttons for 'Save', 'Save & New', and 'Cancel'. The form is divided into sections: 'Information' and 'Alert Type'. In the 'Information' section, there is a 'Service Contract' field with the value 'SC000252' and a 'Contact' field. In the 'Alert Type' section, there are three checkboxes: 'Completed Visits', 'Actions', and 'Billing', all of which are currently unchecked. At the bottom, there are buttons for 'Save', 'Save & New', and 'Cancel'.

- Click Save

NB: If you are creating Alerts from the Contract/Job screen, alerts will be sent out for any associated schedules. If creating an alert for a schedule, the alerts will only ever get sent from that particular schedule

### 4. Create additional Schedules

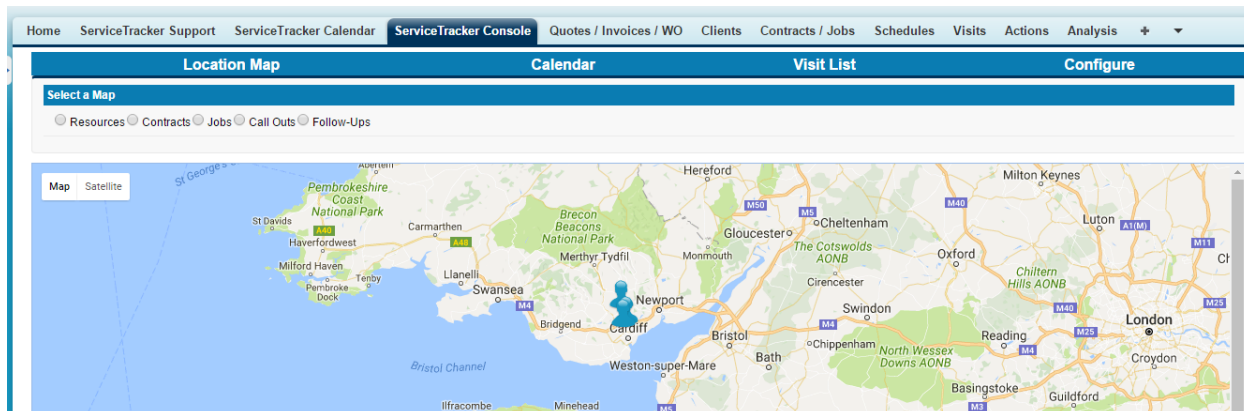
- Click on the Schedules Tab of the Contract/Job Detail Page and Click New Schedule

The screenshot shows the 'Schedules' tab selected in the top navigation bar. Below the tabs, there are buttons for 'New Contract Schedule' and 'New Call Out'. A message 'No records to display' is shown below the buttons.

- Follow the steps listed in guide **3.1 Part 2** to complete the Schedule insert page

## 5. The ServiceTracker Console

Click on the ServiceTracker Console Tab along the Navigation bar (or go to the + button first and select it in the list of tabs). From here you can access the location map of all resources, clients, contracts etc, view all visits on a calendar, access the visit list or configure the system.



### 5.1 Automatic Visit Allocation using the Visit list

- Click on the Visit List at the top of the console
- Select or Create a new view (see Salesforce help for creating new views)
- Select the Visits to Automatically Allocate and click on the Auto Schedule Button

New Visit

Auto Schedule

Manually Allocate

A

B

C

D

E

F

G

H

I

J

K

L

M

N

O

P

Q

R

S

<input type="checkbox"/>	Action	Visit Number ↑	Due Start	Visit Description	Status
<input checked="" type="checkbox"/>	Edit   Del	<a href="#">V00069</a>	07/07/2014 16:09	Sample visit for testing purposes	Open
<input type="checkbox"/>	Edit   Del	<a href="#">V00097</a>	07/07/2014 10:28		Open
<input checked="" type="checkbox"/>	Edit   Del	<a href="#">V00100</a>	07/07/2014 11:38	Gas Visit	Open
<input checked="" type="checkbox"/>	Edit   Del	<a href="#">V00106</a>	05/01/2015 15:05	These are the notes	Open
<input type="checkbox"/>	Edit   Del	<a href="#">V00108</a>	02/07/2014 14:14	Monthly temps, 6 monthly Cal, 1 Year To...	Open
<input checked="" type="checkbox"/>	Edit   Del	<a href="#">V00113</a>	02/07/2014 14:14	Monthly temps, 6 monthly Cal, 1 Year To...	Open
<input type="checkbox"/>	Edit   Del	<a href="#">V00208</a>	18/08/2014 12:45		Open
<input type="checkbox"/>	Edit   Del	<a href="#">V00493</a>	31/07/2014 08:53		Open

- This will now search for all Visit Service Territories and Assign the Visits to the Corresponding Resources with the Same Service Territory

## 5.2 Manual Visit Allocation using the Visit list

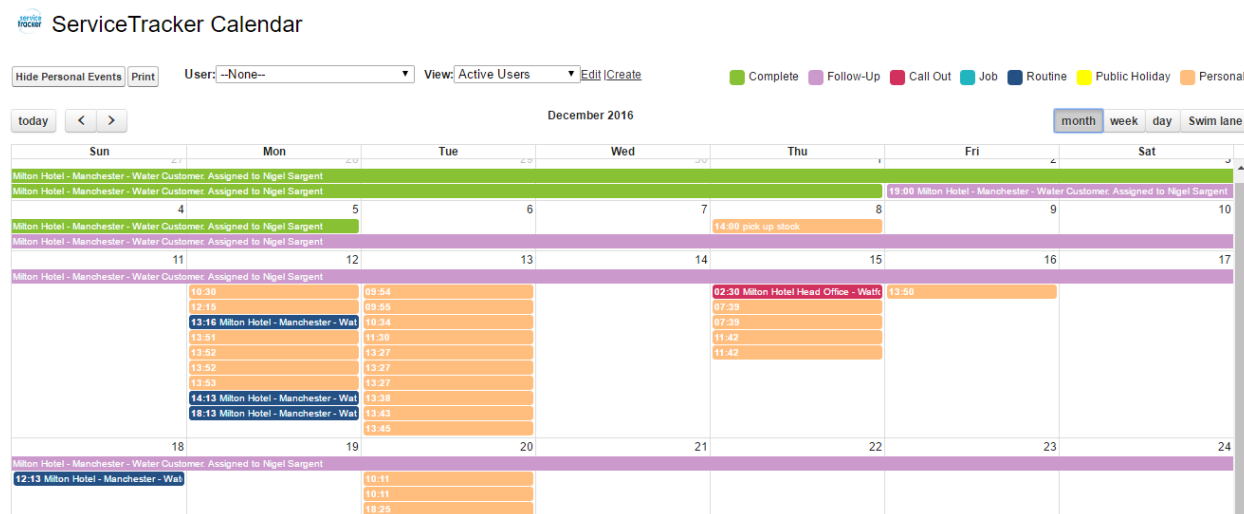
- Follow the Steps shown for Automatic Allocation and click Manually Allocate instead of Auto Schedule from the View

[Show Calendar](#)

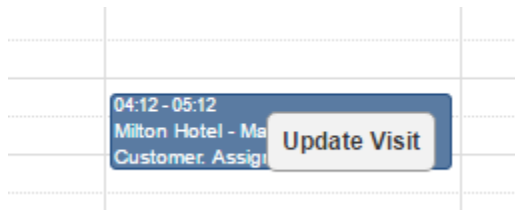
Due Start	Due Finish	Account	Product	Type	Resource
31/07/2014 18:50 [ 01/08/2014 13:11 ]	31/07/2014 19:50 [ 01/08/2014 13:11 ]	Electrical Solutions Ltd	Chlorine Dioxide	Unscheduled	Sub Contractor [ 🔍 ]
31/07/2014 18:37 [ 01/08/2014 13:11 ]	31/07/2014 19:37 [ 01/08/2014 13:11 ]	Pest Solutions Ltd	Routine Inspection	Unscheduled	Pete Nicholson [ 🔍 ]
31/07/2014 08:53 [ 01/08/2014 13:11 ]	31/07/2014 09:53 [ 01/08/2014 13:11 ]	Electrical Solutions Ltd	Routine Inspection	Unscheduled	Mike Day [ 🔍 ]
30/07/2014 10:30 [ 01/08/2014 13:11 ]	30/07/2014 11:30 [ 01/08/2014 13:11 ]	Electrical Solutions Ltd	Routine Inspection	Scheduled	Pete Nicholson [ 🔍 ]

## 5.2 Manual Visit Allocation using the Calendar

- Access the Calendar by clicking the Calendar option in the ServiceTracker Calendar



- You can edit the Due Start, Due Finish and Resource by right clicking the calendar entry or, update the Due Start and Due Finish only by using the drag and drop features





## 6. Managing Calendars

### 6.1 Using the ServiceTracker Calendar

- From the Calendar page you can select a particular user or a collection of users using the View. To create a new view see the Salesforce help pages

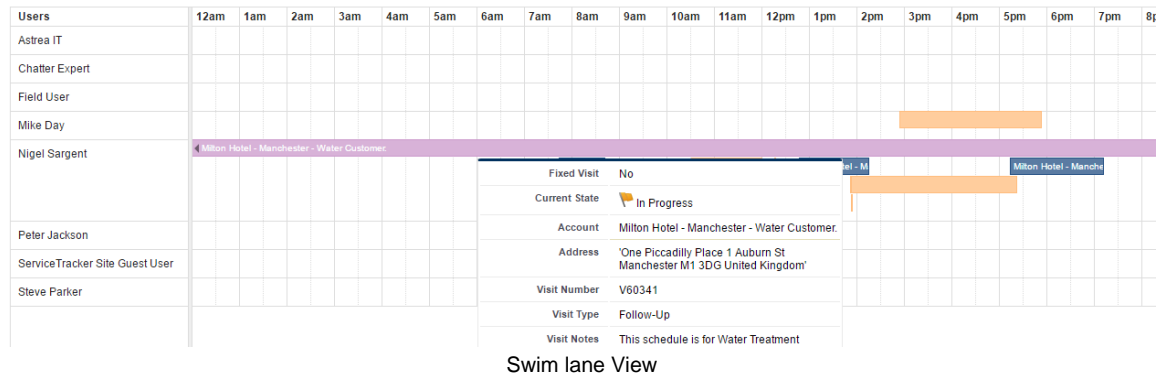
User: --None-- View: Active Users [Edit](#) [Create](#)

- Once you have selected either the user or the collection of users you can navigate the Calendar as follows:

- Navigate the Days, Weeks, Months and years using the left and right arrows



- Select the Calendar screens using Month view, Week view, Day view or Swim Lane view (to see all users in a matrix)



- Use the Key to ascertain the types of visits being shown in the Calendar

■ Complete 
 ■ Follow-Up 
 ■ Call Out 
 ■ Job 
 ■ Routine 
 ■ Public Holiday 
 ■ Personal

- Show or Hide and personal events, including public holidays, office appointments, sales appointments etc

[Hide Personal Events](#)
[Show Personal Events](#)

- Roll your mouse over a calendar entry to view the detail and current state

## 7. Creating Quotes, Invoices or Work Orders

### 7.1 Creating a Quote/Invoice/WO and Line Items

- From either the Client, Contract/Job, Schedule or Visit Detail pages click the Quotes/Invoices/WO Tab and click “Quick Create”

Contract / Job  
002666

Customize Page | Printable View | Help for this Page

Details Schedules Contract Consumables **Quotes / Invoices / WO** Notes and Attachments Alerts History Summary

**Quotes / Invoices / WO** Quick Create

Action	Number	Date	P.O. Number	Total Value	Status	Recurring	Next Billing Date
Edit   Del	QI-003271	14/12/2016		£456.00	New	<input type="checkbox"/>	

- Enter The RecordType (Quote, Invoice or WorkOrder), enter the date and select Contract or Job Work

**New Quote / Invoice / WO** Save Cancel

Record Type: Invoice Contract or Job: -None-  
Billing Account: Milton Hotel Head Office - W Date: 10/01/2017  
Account Ref: PEST01 Bill To Site: ☐  
P.O. Number: HH1

**Line Items**

You can enter 10 line items at a time. More items can be added after the record has been created.

Line Item	QTY	Help
<input type="text"/>	<input type="text"/>	Pricing and Descriptions will be taken from the associated pricebook. You can change these on the next page
<input type="text"/>	<input type="text"/>	Pricing and Descriptions will be taken from the associated pricebook. You can change these on the next page
<input type="text"/>	<input type="text"/>	Pricing and Descriptions will be taken from the associated pricebook. You can change these on the next page

- Select any Line items using the Lookup to the product and enter and Quantity
- Click Save to go to the next step
- Enter the Line item description and add any discount, amend the price etc. if required

**Edit Line Items (Step 2)** Save Cancel

Item	Line Description	QTY	Sales Price	Discount %	Total Line Value
24 Hour Call out	24 Hour call out	1	150.00		£150.00

- Click Save to create the record
- Click Print or Email (Depending on your setup) to generate the document

NB: You can amend, remove or add new line items using the Line Items tab within the Quote/Invoice/WO record

Quote / Invoice / WO  
QI-004151

Customize Page | Printable View | Help for this Page

Details **Line Items** Recurrence Open Activities Activity History Notes and Attachments History

**Line Items** New Line Items Edit Selected Remove Selected Invoice Selected

Action	Item Number	Product	Product Code	Line Description	Quantity	Line Value	Already Invoiced	Invoice Status
--------	-------------	---------	--------------	------------------	----------	------------	------------------	----------------

## 7.2 Converting a Quotation

- To convert a quotation to an Invoice or Work Order, click on the Line Items tab and select the items you wish to convert

Back to List

Details

Line Items

Open Activities

Activity History

Notes and Attachments

History

Line Items

New Line Items

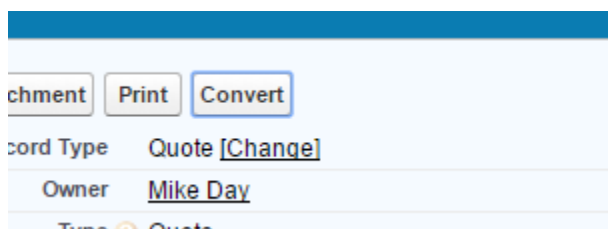
Edit Selected

Convert Selected

Remove Selected

<input checked="" type="checkbox"/>	Action	Item Number	Product	Product Code	Line Description	Quantity	Sales Price	Discount %	Line Value	Invoice Value	Status
<input checked="" type="checkbox"/>	<a>Edit</a>   <a>Del</a>	<a>IN-008485</a>	<a>24 Hour Call out</a>	24h	24 Hour call out	1	£150.00		£150.00		New

- Click Convert Selected (you will be prompted to accept the conversion then taken to the detail tab)
- Click Convert at the top of the screen



- Follow the on-screen wizard to create the contract, schedule and visits and to associate the quotation with the new record. At this stage you can change the Quote to a Work Order or leave it as a quote for another conversion

### Convert Quote

Please enter the Number of Visits, Schedule Interval, Frequency and the Owner using the fields provided

Schedule Start Date	<input type="text" value="10/01/2017"/>
Number of Visits	<input type="text"/>
Schedule Interval	<input type="text"/>
Schedule Frequency	<input type="text"/>
Schedule Owner	<input type="text"/>
Change Quote to Work Order on Convert	<input type="checkbox"/>
Convert Line Items to Actions	<input type="checkbox"/>
Add Inspection Items to Schedule	<input type="checkbox"/>
Share Via Portal	<input type="checkbox"/>

<

January

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2017

▼

Mon	Tue	Wed	Thu	Fri	Sat	Sun
26	27	28	29	30	31	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today

## 7.3 Invoicing

With ServiceTracker you can part invoice selected line items or the entire invoice depending on how the system has been configured to work with your finance system

To simply invoice the entire record, you can change the status of the invoice to “Send to Finance System”. This will then mark the record ready for sending

Requested By ?

Status ? **New**

Bill To Site ?

xtInvoiceCreated

To select specific values or items, firstly go to the Line Items tab, select the records you would like to invoice then click “Invoice Selected”

Quote / Invoice / WO  
f QI-004151

Customize Page | Printable View | Help for this Page ?

« Back to List

Details Line Items Recurrence Open Activities Activity History Notes and Attachments History

Line Items

New Line Items Edit Selected Remove Selected Invoice Selected

Action	Item Number	Product	Product Code	Line Description	Quantity	Line Value	Already Invoiced	Invoice Status
<input checked="" type="checkbox"/>   Edit   Del	IN-008485	24 Hour Call out	24h	24 Hour call out	1	£150.00		Not Invoiced

Enter the values you would like to Invoice, change the line item status to “To be Invoiced” and click save before changing the status of the invoice to Send to Finance System”.

Edit Line Items

Save Cancel

Reference	Item	Line Description	QTY	Sales Price	Discount %	Total Line Value	Invoice Value Remaining	Invoice Value	Status	Status
	24 Hour Call out	24 Hour call out	1	£150.00		£150.00	£150.00	100	Not Invoiced	To Be Invoiced

## 7.4 Set Recurring Invoice reminders

- Click the Recurrence tab on the Quote/Invoice/WO record (The Quote must be related to a contract with the correct invoice settings entered see 3.1)

Quote / Invoice / WO  
 f QI-004151 Customize

**Details** Line Items Recurrence Open Activities Activity History Notes and Attachments History

**Recurrence Information**

Recurring	Next Billing Date
Billing Interval	Billing Frequency

- Check the Recurring Flag so that the record appears in reports and set the Billing Interval, Next Billing Date and Billing Frequency
- Click Save

## 8. Reports and Dashboards

### 8.1 Accessing the Report features and individual reports

- From the Tab bar (or the + at the top) select “Reports”

Home ServiceTracker Support ServiceTracker Calendar ServiceTracker Console Quotes / Invoices / WO Clients Contracts / Jobs Schedules Vis

**Reports & Dashboards** New Report... New Dashboard...

**Folders**

Find a folder...

**All Folders**

- Unfiled Public Reports
- My Personal Custom Reports
- My Personal Dashboards
- Customer Dashboards
- Customer Reports
- ServiceTracker Key Business Metrics
- ServiceTracker Key Business Metrics
- Client and Contact Reports

**All Folders**

Find reports and dashboards...

Action	Name	Folder	Created By
	Portfolio by Technician	ServiceTracker...	Day Mike
	Clients signed up last 60 days	My Personal C...	Day Mike
	Clients with no Postcode or Geolocation All Clients with no Postcode or Geolocation	ServiceTracker...	Day Mike
	Timesheet	Customer Rep...	Day Mike
	Overdue Visits by User	Customer Rep...	Day Mike

- You can search for a folder using the left pane and search area or for a specific report/dashboard using the right pane search
- Click on the Report or Dashboard you would like to view

### 8.2 Running a report

- Once you have selected the report you can change some of the parameters using the date ranges and filters

**Report Options:**

Summarize information by:

Schedule Owner ▼

Show

All contracts / jobs ▼

**Time Frame**

Date Field

End Date ▼

Range

Custom ▼

From

To

- Once you have selected your report options you can then click the “Run Report” button to view the changes

Run Report ▼

- You can also export all the details to an Excel or CSV using the Export Details button or Printable View

Printable View

Export Details

## 8.3 Viewing a Dashboard

- Once you have selected the Dashboard you would like to view from the Reports list you can then drill down into the detail by clicking into any of the charts

**ServiceTracker Key Business Metrics**[Help for this Page](#)

Find a dashboard... ▼

Edit Clone Refresh

As of 01 December 2016 at 18:15

Viewing as Mike

**ACTIVE USERS BY PROFILE**[\(CLICK TO VIEW\)](#)

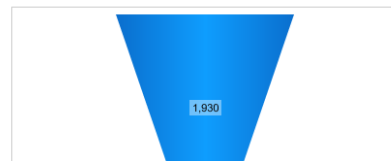
Profile	Record Count
Chatter Free User	1
Non Developer Admin	1
ServiceTracker Customer	1
ServiceTracker Field User	2
ServiceTracker Portal	1
ServiceTracker Profile	1
System Administrator	2
<b>Total</b>	<b>9</b>

**NOT LOGGED IN (CLICK TO VIEW)****PORTFOLIO BY TECHNICIAN**[CLICK TO VIEW DETAILS](#)

Schedule Owner	Sum of Number of Visit Per Year	Sum of Value
Mike Dav	57	£54K
Nigel Sargent	32	£9K
Service Queue	12	£567
<b>Total</b>	<b>101</b>	<b>£63K</b>

**VISITS DUE (NEXT 90 DAYS)**[CLICK TO VIEW DETAILS](#)**QUOTE STATUS REPORT**

Status	Record Count	Sum of Total Value
New	3	£2K
Survey	1	£150
<b>Total</b>	<b>4</b>	<b>£2K</b>



NB: You can also change Dashboards using the “Find a dashboard...” area at the top of the screen

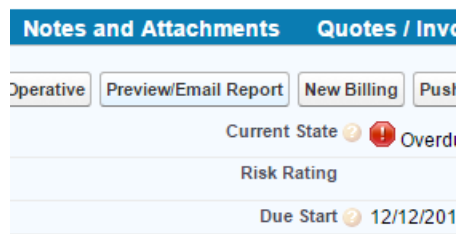
## 9. Documents, Certificates and Files

ServiceTracker is capable of creating and storing many different types of records. You can generate and send quotations, invoices, service sheets, certificates, contract documents and much more depending on how your system has been setup

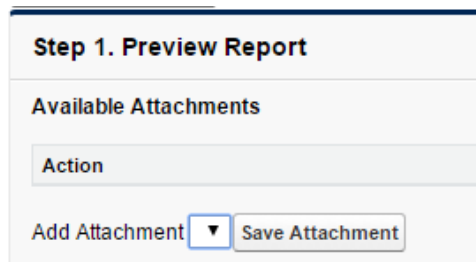
ServiceTracker also acts as a document repository/E-Log book for customers and mobile users.

### 9.1 Generating and sending Visit reports / Service Sheets

- Within a visit record you can click the Preview/Email report button to access the document screen



- Select the Report you would like to generate using the list of available reports and click Save Attachment



- You can now either view the generated document or send it via email using the email feature in Step 2 of the page



## 9.2 The Documents tab

- From the tab bar (or +) click Documents

**Document Folders**

Folder: My Personal Documents Go! [Create New Folder](#)

---

**Recent Documents** New Recently Viewed ▼

Name	Description	Type
<a href="#">Mike Day Signature</a>		png
<a href="#">Signature Nigel Sargent.png</a>		png
<a href="#">Test Signature</a>		jpg
<a href="#">Health &amp; Safety Policy.docx</a>		docx
<a href="#">COSH Assessment.docx</a>		docx

- Select or Create a new document folder
- Click on the document to view the detail or click “New” and follow the steps to upload a new document



### Upload New Document

**1. Enter details**

Document Name

Document Unique Name

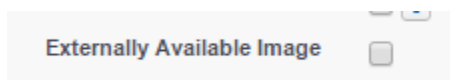
Indicate Document is Internal ☐ i



### 9.3 Standard Documents (for mobile and portal users)

Standard documents are used to allow mobile and portal users visibility of your documents such as Health and Safety, COSHH, MSDS etc.

- Ensure that you have created a document folder and the document you would like to share exists and has been given permissions for external access



- From the tab bar (or +) click Standard Documents

View: Standard Documents Edit Create New View						
A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Other All						
Action	Name +	Description	File Size	Last Modified	Type	Author
Edit   Del   View   Email	COSHH Assessment.docx		10KB	06/10/2015	docx	MDay
Edit   Del   View   Email	Health & Safety Policy.docx		10KB	06/10/2015	docx	MDay
Edit   Del   View   Email	ISO Document.pdf		53KB	06/10/2015	pdf	MDay

- Create a new view to the folder you would like to share

**Documents**  
**Edit View**

Save Save As Delete Cancel

**Step 1. Enter View Name**

View Name: Standard Documents

View Unique Name: Standard\_Documents

Namespace Prefix: STKR

Created By: Mike Day, 29/05/2015 17:57 Modified By: Mike Day, 06/10/2015 12:34

**Step 2. Specify Filter Criteria**

**Filter By Owner:**

☒ All Public Documents

☐ \_\_MISSING LABEL\_\_ PropertyFile - val mine not found in section DocumentFilter

**Filter By Additional Fields (Optional):**

Field	Operator	Value	
Folder Name	equals	Standard Documents	AND
--None--	--None--		AND
--None--	--None--		AND


- Give the view a name, select the folder you wish to share and allow permissions for all users to have visibility
- Click Save

## 9.4 Client Attachments

Client Attachments are files related specifically to a client or site for reference via the web, portal or mobile. These would typically include schematics, contract documents or important information related to the site.

Client Attachments				
			<a href="#">Add Attachment</a>	<a href="#">Client Attachments Help ?</a>
Action	File Name	Description	Type	View
<a href="#">Edit</a>   <a href="#">Del</a>	<a href="#">schematic.png</a>	Schematic	Photo	<a href="#">View</a>

- Click the View link to access the file
- Click Add Attachment to upload a new file

 Milton Hotel - Manchester - Water Customer  
**Attach File**

Back

Cancel

File

Choose file

No file chosen

Type

Document ▼

Description

Attach File

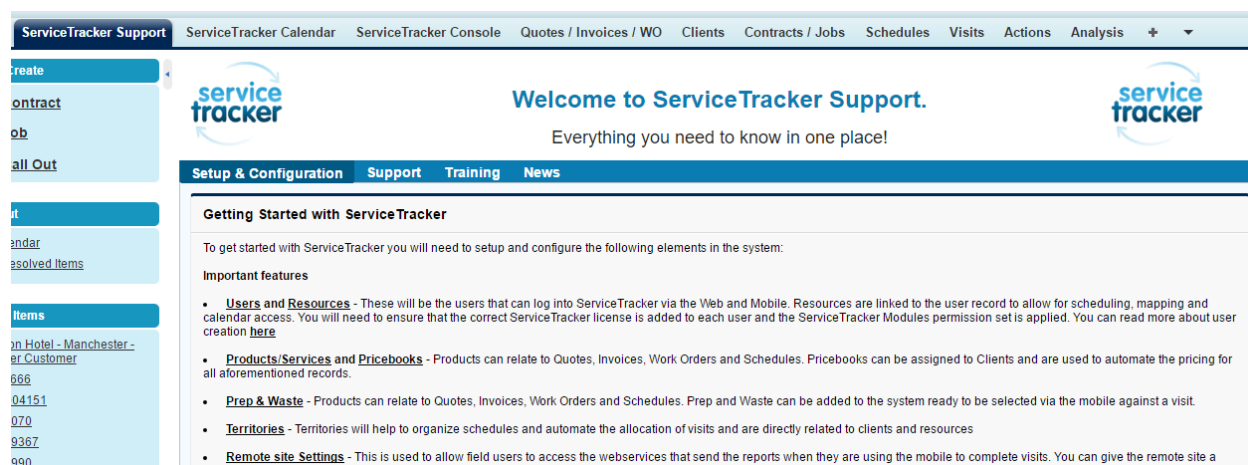
## 10. Other Information and Features

We are constantly updating the ServiceTracker application depending on our customer requirements and as such there are many features not covered in this manual or yet to be developed.

You can always check the release notes on our website to keep up to date with new features and changes and we will send a mail-shot when changes are due to be applied

<http://www.servicetrackersystems.com/blog/support/>

The ServiceTracker support tab (accessed at the top of the screen or using the +) will provide you with all the important setup features, training, news and access to the support console



For any other support related queries, comments or feature requests, please email us at [support@servicetracker.uk.com](mailto:support@servicetracker.uk.com)