Customer Contacts nav

Customer	Contact	S					Create Ticket]				
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin					
Contacts	Billing	Products										
					<u></u> <	2 0	of 6 > 🗵	L.				
Customer In	nfo			Custor	ner Sites							-
	Customer S	umo Wrestler's Gu	uild LLC		lo. Name				Street	City	St Zip	
Da	ate Added 1	/9/2007			1							
Affiliated	Location	allas										
Account	Manager											
		ala Adduces										
Street	M	ain Address —										
Type 3						and a stand	e !					
City		St	Zip	Custon	ner Contacts for	<selected< td=""><td>Site></td><td></td><td>Email -</td><td></td><td></td><td></td></selected<>	Site>		Email -			
subtype	3	3370	75112				First Name	Last Name	Alert Prm 🕇			
	M	ain Phones —		<u>.</u>			🔍 Jim	Beam	Critical 🗆 🖶 📤			
Туре	Phone	Comments	Prm 🗆	-			e					
									-			
		Main Email —		_			s	elected Contact De	tails			
Send Er	mail Notificat	ion for New Tick	et				First Nam	e				
Email Alerts	5						Last Nam	e				
	Affiliated Sta	ff A	lert 🗧				Email Aler	t				
0		C	ritical 📅 📤				Sit	e				
0							Departmen	it				
							Titl	e				
			•									
							Turne Bhane	Commente				
Manager Die	spatch Note						Type Priorie	Comments	, <mark>Fmi ●</mark>			
Deale and	opaten note	h - Para and		-				1	<u>r= @</u> F1			
Don't get the	ese guys angry,	believe me!										
							L		•			
						Туре	Email		Comments	Prm 🕇		
]		
										-		

New Customer	From Menu only, runs a script which first runs a duplicate check, then adds customer. Also adds a default site, which cannot be deleted unless the customer is deleted. Also imports customer labor rate records from the labor rate lookup table; rates can then be edited.
Main address	actually fills in site no. 1
omail alorto	created a join record between this sustemar and an affiliated staff

- email alerts creates a join record between this customer and an affiliated staff person.
- email alert hover over it to get the email address info
- add email alert alert adds an email join record, lands the cursor in the aff staff field, which is a drop down menu with type ahead turned on; once a match is made, it auto enters their zzk; auto-enters "All" for the alert.

delete email pops a modal dialog confirming delete, then deletes the record **alert**

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Customer Contacts nav

Customer sites/no.	auto-enters a sequential number for each new site, doesn't skip; not an enterable field. If a site is deleted, it does NOT try to resequence the numbers. Once a site is deleted, NEVER resequence the numbers.	
Customer sites/add	adds a new customer site record, selects it, and ends with the cursor in the street field; auto-enters "TX" as the state	+
customer sites/delete	checks to see if there are tickets or what-not attached to it, and aborts with a modal warning if so. This can't be overcome outside of developer mode in a utility layout. If no other attachments, pops a modal dialog asking to confirm delete, then deletes record. Also won't allow deletion of the last site.	đ
customer sites/select	sets the selected site to hilited background, and sets it as the chosen site under customer contacts.	0,
customer contacts/ site	a value list of all the customer sites, along with the word "all" at the top. "all" shows all contacts regardless of site affiliation. choosing a site filters the list of contacts to only contacts for that site. Once changed, the selected contact changes to the primary contact for that site. It shows the No., the Street, and the City	
	Jan 16, 2007 Rudy said, the all option is not needed.	
primary	in any portal, deselects the previous primary, and checks the new one; for contacts, if "all" is selected, makes that contact the primary for his OWN site.	
add contact	adds a contact for the selected site. If "all" is selected, the button disappears, and you can't add a new contact. Contacts have to be associated with a site. Automatically selects the new contact, and goes to the first name field in the detail section. If this is the first contact for the site, it makes it the primary.	•
delete contact	pops a modal dialog confirming intention to delete, then deletes. also deletes associated phone and email records, and alert join records.	đ
select contact	hilites selected portal row, and shows details for tha tcontact below.	0,
contact alert	actually creates a join record through a relationship with the selected value	
contact details site	not editable, because of logic problems: if you changed a primary contact to a site which already had a primary it would not know which is the primary contact. Must be managed by selecting the site first and then adding the contact.	
Find	Pops up a customer find window; find always filters to the current logged in person's location	6



Customer Contacts nav

List View	Pops up a customer list window, with the current found set showing	<u> </u>		
Navigate	goes back and forth through the current found set	<	2 of 6	>
first login behavior	finds all for the current logged in person's location, unless it is the Dallas admin op mgr, in which case it simply shows all. In either case, sorted in creation order (unsorted)			
all portal selections	all portal selections are stored in text fields as part of the customer record, not in global fields	۵.		
Account Manager	Popup Menu of Sales Persons for this Aff location			

Customer Billing nav

Customer B	lilling						Create Ti	ket					
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admir	n					
Contacts	Billing	Products											
					<u></u> <	2 of	6 >	₹					
Customer					Customer S	ites							
Custom	er				No. N	ame				Street	City	St Zip	
Billing Conta	ct												
Billing Addres	ss												
	I				Info for <s< td=""><td>elected Site></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td></s<>	elected Site>							
Account Info A Tax I WPP Author	Account Nur Exempt Nur rization Nur	nber nber nber Credit Hold					Customer Ser Maintena	vice Type ince Default Rate	Customer Rate	Maintenance Cont blah Sales Tax Iten	n	%	
		Provider				_		Ex	pected Re	sponse Times			
	DO Boguire	DIR d for Tickot						-					
	PO Require	d for ficket						Critical		0 16	-		
Travel Billing Travel Bill Ho Remote Billing	ling Option ourly Rate: Flat Rate: Bill f	Hourly						Major Minor		1 8 5	.		
		Rate											

Billing Contact	Drop Down type ahead; Value list is filtered to contacts for this customer
Billing Address	auto-enters the billing address contact's site address, concatenated into this field
excluded fields	Moving to QB's, so this isn't needed, it is stored in QB's; These fields include Customer Payment type, Customer Payment, and invoice terms
Customer Service Type	This has a vlaue list that is hard coded into the solution, in a normal textual value list as here.
Maintenance Contract Type	Value list from the appropriate table as on the admin/global page
Auto Enter values	Sales tax rate, hourly, flat, and trip charge, remote billing rate all auto-enter from the admin page values
Credit Hold	This does not come over from QB, but is manually set by Aff management.

Customer Products nav

Customer	Products	5				Create	Ticket			
Customer	Ticket	PO	Inventory	Vendor	Product	Staff Ad	min			
Contacts	Billing	Products			<u> </u>					
					<	2 of 6	> 🚉 Custo	mer Volce		
		Custo	mer Sites No. Name			Street	City	St Zip	+ 	
									.	
Type	Switch	<u>Sw</u>	itch Vsn II	nstall Date 団 団	★ [-]	Type Swi	tch Si Total Ports Phi	witch Vsn Install Dat	Ports	
							SEB Phone No.	SEB Login		SEB Password
		-				Secondary Equipme	nt			
		Prod	uct	Version Install Da	te No. Ports	No. Licenses Login	Password	Serial No.		
									•	

select site select a site to see the associated products for that site below

0

Customer New pop

		New Customer	
	Make sure the new custo	mer you are trying to enter is	sn't already in the database.
Customer		Customer	
Contact		Contact	
Street		Street	
City		City	
			View
ſ	<back< td=""><td>Cancel</td><td>New</td></back<>	Cancel	New

match info	initially, this doesn't appear. One information has been entered, and new clicked, if there is a match, it shows the match, and the new button text changes to "New - Override Match"
Back	only appears if there is a match after clicking "new"

- **Cancel** Closes popup window and goes back to the original window.
- New checks first to see that all fields have entries. Then checks to see if there is a partial match against a customer for the customer, site, and contact. If not, creates the new customer and adds these values. If so, shows the match info and view button, and the new button changes to "new Override Match"
- View closes window, and goes to that customer as the only record in the found set.

Customer Find pop	
Location	
Customer	
Date Added	
	·
Contact	
Address	
Manager's Note	
F	or Multiple Matches, go to:
	O Detail O List
Cana	al Eind
Cance	Find

Location auto-enters logged in user's locationhidden unless logged in user is admin operations manager

MultipleIf only one match is found, always closes this window, returns to
original window, establishes single found record as teh focus, and
only record in the found set. If Multiple matches are found, Detail
option returns to original screen with 1rst match as focus and
several in the found set, but showing only one. If Lis, this window
does NOT close, but goes to the list view popup, where a customer
can be selected.

Customer List pop

		tomer List				
ustomer	Affiliated Location	Address	Primary Contact			
			I			
	Ι	I	I			

Layout list view layout; click a row to select, which closes window and goes to that selected record with the same found set and the same sort order.

Ticket PrepList nav

Ticket PrepList

:ket	PO	Inventory	Vendor	Product	Staff	Admin	
rep	Dispatch	Close	Timesheet	List	·		
				-	Att Location	Austin	_
Date/Time	Site/Custom	er		Pro	blem Type	Scheduled Date	
26/06 12:22P	Thomas J	Jefferson Elemen	tarv	Vo	cemail Probler	ms	>
27/06 12:29A	Plaza of t	he Americas	,	Sy	stem Down	12/27/2006 9 AM	>
							>
		-					
	t Date/Time 26/06 12:22P 27/06 12:29A	t Date/Time Site/Custom 26/06 12:22P Thomas J 27/06 12:29A Plaza of t	t Date/Time Site/Customer 26/06 12:22P Thomas Jefferson Element 27/06 12:29A Plaza of the Americas	t Date/Time Site/Customer 26/06 12:22P Thomas Jefferson Elementary 27/06 12:29A Plaza of the Americas	t Date/Time Site/Customer Pro 26/06 12:22P Thomas Jefferson Elementary Vo 27/06 12:29A Plaza of the Americas Sys	Aff Location t Date/Time Site/Customer 26/06 12:22P Thomas Jefferson Elementary 27/06 12:29A Plaza of the Americas System Down	Imp Disparent Orasio Immediate List It Date/Time Site/Customer Problem Type Scheduled Date 26/06 12:22P Thomas Jefferson Elementary Volcemail Problems 12/27/2006 9 AM 27/06 12:29A Plaza of the Americas System Down 12/27/2006 9 AM 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1

- e site customer, shows their SITE/CUSTOMER, not the other way around
- **portal arrow** actually if you click anywhere on the entire row, it selects it and takes you to that record within this found set on the Ticket/Prep layout
- **Portal found** All tickets with status of "New" or "Incomplete" are found upon navigating to this layout the first time in a session, and are further filtered by the location. These ticket ID's are put into a multiline key, and remain here for this user's session until they log out.
- **Refresh** Drops any tickets that have been prepped or dispatched without logging out...
- **Hilited Rows** If the ticket severity level is critical or major, that row hilites red and sorts to the top of the list in the sort order

Ticket PrepList nav

- **Selected row** The current ticket in the Prep layout is hilited yellow on the portal row here
- List view Jan 16, 2007 Rudy would prefer a list view instead of a portal

Ticket Prep nav

Ticket Pre	p						Create Ticket]			
Customer	Ticket	PO	Inventory	Vendor	Produc	t Staff	Admin				
PrepList	Prep	Dispatch	Timesheet	Close	Review						
	•		<	2 of 24	>	Ticket No. 12	2345		Aff	iliated Locations	`````````````````````````````````````
Ticket	No. These pe	custon	rama queens a ner/Site —	ind	_						
	Customer	Plaza of the A	Americas			Problem	Dispa	tch Note	Products	Returns	Related Ticket
	Site	Plaza of the A	Americas			Problem					
	Customer PO	Plaza of the A	Americas			System is down. V	Vorld is coming t	to an end. Global	warming is killing all the	endangered animals. R	obots are taking over the
	Maintenance Contract Type					world. It's all your	fault. Replacing	the switch didn't	solve any of this.		
		Ticke	et		.						
	Ticket Date	e 12/15/2006									
	Scheduled Date	e									
	Statu	s Major									
	Severit	y Service									
	Ticket Type	e Major									
	Problem Type	e System Down	n								
	Technicia	n									
	Work Location	n									
	Labor Type	e									
	Labor Rate	e									
	DI	R 🗌									
I	ncoming Alert II	System Dow	n								
	GNTS No	· Plaza of the	Americas								
	GNTS Outcome	e									
Send Ema	ail Confirmation	s 🗆									
s	end Email Alert	s 🗌									
		Expected Res	ponse Time —		_						
_	- Contracted -		Schedule	d							
			Days								
			Time	Hours							
				20							
			No Later Than 1/2 5:27 PM	20/2007							
		Submit /II	nsubmit								
		oublint/0	Isabilit								

PreviousGoes to previous record, hilites appropriate portal on the PrepList**Record "<"**screen

Next Record Goes to next record, hilites appropriate portal on the PrepList screen ">"

- **Products/Pro** a type ahead value list of all product types **duct Type**
- **Products/Su** a type ahead list filtered by Product Type selection **b Type**
- **Products/Pro** a type ahead list of product numbers which also show a portion of the description; when selected, it shows the product no. in the field
- **Products/+** adds a product to the ticket to either get from inventory or order on a PO from a vendor; once clicked, creates a portal record below, and sets the cursor in the Ord'd field
- **Products/Or** quantity of items needed for the ticket; entered manually within the portal

+

Ticket Prep nav

Products/Inv try	Shows the products in inventory for the chosen location, minus the count of products for tickets in this list that have been committed	
Price	auto-entered from the product price adjusted for customer and product discounts for DIR and WPP	
Affiliated Locations	This only shows for the departments set in admin/global; for others, it auto-enters their location at login and hides this option	
Refresh List	Re-evaluates the found set for tickets that are status NEW for the chosen location; appears for ALL operations manager, not hidden like the location chooser	2
Returns Tab	Puts items on a list so the system will know what products and how many to expect back into inventory before the ticket can close	
Delete Button	Deletes a portal row	đ
Unsubmit	If status is not new, moves it back to new status, removes from dispatch and PO queue. Adds a status history and timestamp to the ticket history; does not reverse this. Also creates an inventory record adding the products back if they were free and subtracted from free inventory for this ticket, freeing those items back up for allocation.	
	Submit and Unsubmit are the same button with dynamic text; if it has been submitted, the button says unsubmit; if it has not been submitted, or has been unsubmitted, it says submit.	
Submit	If there are no products needed for the ticket, sets the status to "Ready" and moves it into the dispatch queue. If there are products associated with the ticket, and there is no free inventory for the products, status gets set to "PO" and moves into the PO queue. If there are products associated with the ticket and there IS free inventory for the ticket, sets the status to "Ready", and creates an inventory entry for these product lines subtracting these items from inventory. Records the status of the ticket with a timestamp into the ticket history table.	

Submit button changes to say "Unsubmit"

Ticket Prep nav

Product entry Jan 16, 2007 Rudy: 1. choose product by description; the popup list shows the description concatenated with the prod no. with a monker for whether it is refurbed or not.

Also choose by product number; two products can have same number but be refurb or not refurb. Choice should show this, and price should auto-enter accordingly.

In products, remember that there are two entries esparately for the same product for refurb or non-refrub, and inventory is tracked separately.

If refurb, the product description will contain this information...

- RelatedJan 16, 2007 Rudy: You can choose a closed ticket from a list thatTicketfilters to only closed tickets within the last 30 days for this
customer/site.
- **Products/Inv** auto-enters amount that is available from inventory; if it fulfills the order 100%, doesn't go to purchasing.
- Labor type
and rateThe customer looks up labor rates from the global admin table. The
ticket looks it up from the tech's default labor type, and gets the
rate from that. This rate can be edited on this screen.

Expected
ResponseThis is pretty confusing, but this is it. if the ticket is MAJOR or
CRITICAL, it calculates the days and hours based on the hours in
the hours field that it looks up from the customer. If it is minor, it
calculates according to this:

If the ticket is minor, the hours do not show. If it is major or critical, ONLY the hours show.

For minor, if days says 1-5, then ONLY AM/PM shows as a choice for the time. The Response time says "No later than " and the ticket date + that many days, + AM or PM. If the days has an actual date, the time has no value list, and validates to have a valid time.

If someone chooses the MMDDYYYY option, it puts the date that is the number of days for their customer site preference. Time

Ticket Dispatch nav

Ticket Dispatch	Create Ticket
Customer Ticket	PO Inventory Vendor Product Staff Admin
PrepList Prep	Dispatch Timesheet Close Review
Dispatch Date 12/27/06	View Prefs Stats Dispatch View Timesheet PDF View Customer Ticket View Daily Invtry
Site	Ckets Load Items Technicians
? Thomas Jefferson	12/27/06 12/28/06 P<
? Plaza of the Americas	12/27/06 12/27/06 20 Sick Sick
	Ticket Details Tech Details
	Ticket No.
	Customer Plaza of the Americas Site Plaza of the Americas
	Customer PO Plaza of the Americas
	Maintenance Contract Type
	Ticket Problem Dsp Note
	Ticket Date 12/27/2006
	Status Critical
	Severity Service
	Technician
	Work Location
	Labor Rate
	Ticket Reference
	Tricoming Alert ID
	GNTS No. Plaza of the Americas
	Send Email Alerts
	Contracted Scheduled
/	
Tech's	Gives either "Available", a conflicting load item site concurrent with
Relevant	the date and time expectation of the selected ticket, or vacation or
Location	sick or training leave
_	
Dispatch	auto enters today's date when first navigated to this screen per
Date	session; has a calendar popup when clicked into
View Prefs	Pops up the Dispatch view prefs window
Stats	Pops up the dispatch statistics window
Dispatch	Sets the status of all tickets shown here to "Dispatched" and creates
	a time sheet PDF for each tech, and separate customer ticket PDF's
	for each client, and a daily inventory report for each tech for the

day, assembles each into a single PDF, and emails these to the techs; also gives each ticket a new ticket status history child record with the status and timestamp. IMPORTANT NOTE: Also creates inventory ledger entries subtracting the loaded items out of inventory, and updates the totals for the product records

Dispatch

Ticket Dispatch nav

? If hovered over, gives a tooltip with the type, level, and problem; if clicked, pops up window with details about the ticket, without selecting it

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- **Refresh List** Refreshes the list to show only tickets in the ready status for the selected location
- Tickets Portal The portal on the left side, shows a list of tickets with a status of Ready; sorted by problem level, response time (a calc field showing alternate if it exists, else contracted), and then creation order; critical items are hilited red unless they are actually selected, then they are hilited with the hilite color. Note that none of the fields in this portal are editable or enterable. Also, a click on a portal row anywhere is the same as clicking the magnifying glass, and a shift click is the same as clicking the arrow. Prepped tickets that still have products that have not been received do not show up here, they are in PO status. Once all products have been received the ticket status is triggered to change to "Ready" and it shows up in this screen.
- Tickethilites the portal row, shows ticket details in the lower middleMagnifyingsection of the screen. Also shows load items in the middle top portalGlassfor that ticket, and causes move arrows to appear in the technician
portal. Move arrows disappear from the tickets portal. If there is a
prior ticket associated with this ticket, it shows a refresh arrow
graphic for that tech.
- **Ticket Move arrow** Only appears if a technician has been selected by clicking the magnifying glass for that tech. If clicked while not appearing, the script does nothing. If clicked while a tech is selected, it creates a load item for that tech for that ticket. It ends by having the cursor in the time field in the load items portal.
- **delete load** Deletes a load item from the portal **item**
- Load itemsorted only by creation order; Site and Tech are not editable. Timeportalis editable.
- **Ticket Details** Middle lower screen, shows when a ticket is selected with the magnifying glass. The screen will not actually show tabs for ticket details or tech details, it will simply show what is appropriate for the selection. None of the fields in this section are editable
- **Technicians** Alphabetized by full name, first then last. **Portal**
- Technician
Magnifyinghilites the portal row, shows technician details in the lower middle
section of the screen. Also shows load items in the middle top portal
for that technician, and causes move arrows to appear in the ticket
portal. Move arrows disappear from the technician portal. If there
are prior tickets associated with this tech, it shows a refresh arrow
graphic for each one.

15

Ticket Dispatch nav

Technician move arrow	Only appears if a ticket has been selected by clicking the magnifying glass for that ticket. If clicked while not appearing, the script does nothing. If clicked while a ticket is selected, it creates a load item for that tech for that ticket. It ends by having the cursor in the time field in the load items portal. If they have vacation, sick, or training time, pops a warning modal dialog, but can be overridden and loaded anyway.	<
Technicians Hrs	shows the hours loaded for that tech for the selected dispatch date, accounting for both previously loaded items that are already dispatched that are not appearing on this screen, and items that are not yet dispatched but loaded on this screen.	
Technician Relevant Location	for the given dispatch date, shows either available if nothing is oaded for that dispatch date, or sick or vaction or training if relevant. If there is a load item for that tech, and no ticket is selected, it shows the first load item for that tech for that day. If there is a ticket selected, it shows the tech's availablity according to the response time for that ticket that is demanded. If a tech is busy in the morning but the ticket asks for an afternoon appearance, it shows available.	
Timesheet	When dispatch is clicked, a pdf is created for each appropriate tech and emailed as an attachment. this button will NOT appear on the layout, but is here as a reminder that this pdf will go out, and its format must be reviewed. The file should be named "timesheet_ <ddmmyyyy>.pdf</ddmmyyyy>	View Timesheet PDF
Customer Ticket	PDF's of each ticket will be created for teh techs and attached to the same email noted above, named the ticket_ <number>.pdf</number>	View Customer Ticket
Daily Inventory	The inventory that will need to be gathered in order to fulfill the daily load, in a pdf report. named "inventory_ <ddmmyyyy>.pdf</ddmmyyyy>	View Daily Invtry
Drill to ticket or related ticket	goes to review screen, with ticket or if applicable the related ticket and the ticket in the found set.	>

Ticket Timesheet nav

cket Tin	nesneet					Create Tick	et				
Customer	Ticket	PO	Inventory	Vendor	Product	Staff Admin					
PrepList	Prep	Dispatch	Timesheet	Close	Review						
Date					<	2 of 6 >			Timeshee	t for Jack Frost	
ravel	Begin 9:00 AM	End	Site	lementary	Ticket Status	+					
lere is a time	sheet note ente	red by a tech or	nline	liennen europy	incompie	Time She	et			Timesheet fo	or Jack Frost
					0	Tickets		Completed	1	Incomplete	
					X	Hrs Travel		Hrs Worke	d	Hrs OT	
0:30 AM	11:00 AM	1:00 PM	Plaza of the Americ	as	Complete	-			wheeled		
					e,	Ву		•	When		
					x						
						Time She	et Entry I	Detail		Took Bojasti Ba	ek to Dispatch
					0			< 2	of 2 >	Tech Reject; Ba	
						Travel	Begin	End E	Site	New Ticket Re	ferencing This
					~	10:30 AM	11:00 AM	1 1:00 PM	Plaza of the J	Americas	
						Rate	Hours	Total	Tck Status Complete	Reason Incomplet	<u>e</u>
						Here is an	other timeshee	et not entered t	y a tech online		
								Pi	oduct Returns		
						Product T	pe	Qt	y Product No.	Product Description	
								3	3368		X -
						Product	ub-Type				X
						Product	10	_			
								-			
								-			
											-

Date	Autoenters today's date upon startup; includes a calendar dropdown; triggers new found set when changed. The date is the only find available for timesheets.	
timesheet nav buttons	goes from one tech's timesheet for the selected date; if no detail record has been selected, it selects the top record; otherwise the prior selection for that timesheet persists.	
timesheet entry detail nav buttons	goes from one entry to the next that appear in the portal to the left. Should have a corresponding menu item and key command under the Navigate menu	
Add entry	creates a new time entry for this tme sheet, selects it, displays its details to the right, and puts the cursor in the travel time field, Also updates the "2 of 2" display.	•
select time sheet entry	hilites portal row and shows details to the right. Also updates the "2 of 2" display.	0,

Ticket Timesheet nav

Delete Time Sheet	After a warning modal dialog, deletes the portal row record, selects the record above it, and updates the "2 of 2" display. Also cascade deletes any return products for that ticket	X
Product No.	Product No. VL; type ahead; shows Product number and description, but only enters No. and refurb	
Delete Returned Products	Deletes a portal row record for a returned product entry	X
product return portal	shows records entered by tech online, if any, or can be manually entered	
return product flag	Shows if ticket has any returned products	i
Authorized	checkmark autoenters the logged in Operations Manager and timestamp; unchecking it removes the entries	
initial found set	today's date is auto-entered, and the found set is all timesheets for that day.	
Tech Reject	Pops a modal dialog confirming intention. Tech refuses load item; render load item status as rejected, and move the ticket status back to Ready, add a history item with timestamp. Pops a modal dialog saying this all happened.	Tech Reject; Back to Dispatch
New Ticket Referencing	Incomplete tickets automatically show back up in the prep list with the new tickets; no button is needed for them to go back around. This button closes this ticket, duplicates it, and duplicates its problem, return product, and product info to the new ticket. This ticket gets a history record with a timestamp showing that it was closed.	New Ticket Referencing This
Find/List	add a find and list popup to this, so all timesheets can be seen historically. Still defaults to unauthorized ones when first navigating to the screen.	
OT hours	anything over 8 hrs, including travel goes here	
Dispatch access	give dispatch access to this screen	
Find	Find auto-enters the date entry, and if the find doesn't specify a date, it blanks it out. In fact, these should be the same field. Changing the date on this nav screen triggers a find for timesheets with that date without popping up the find button. this button, and the find menu item, pops up a window to search for timesheets.	%
List	Pops up a window with a list of the current found set.	=

Ticket Timesheet nav

ProductType ahead value list of product description; also shows the ProductDescriptionNo. to the right, but only enters the description. Triggers a lookup
for the product No.

Ticket Close nav

								Create Tick	(et		
stomer	Tick	et	PO	Inventory	Vendor	Product	Staff	Admin			
PrepList	Pre	p I	Dispatch	Timesheet	Close	Review					
				Comp	leted Ti	ckets <	2 of	f 24 >	۴		۴
Ticke	et No.					Problem	Notes	Invoice	Billing Time Sheet	Product Required	Returned Product
		0	stomer/S	ite				Send	to Invoicing OClose with	out Invoice	
Cust	tomer	33699 - Nort	el Phone Ja	ick			Lines		Internal Memo	Customor	Maccana
	Site						Lines		Internal Memo	Customer	message
Custom	er PO								Create Lines		
Mainter	nance					Quantity	Description			Unit Price Tax	Ext Price
			Ticket								
Ticket	Date										
5cheduled	Date										
s	Status	Type 1									
Sev	verity										
Ticket	Туре	Type 1									
Problem	Туре	Send to Invo	icing								
Techr	nician										
Work Loc	cation		Ъ								
Labo	or Type		1								
Labo	or Rate										
	DIR										
coming Ale	ort ID										
GN	TS No.										
GNTS Ou	tcome										
icket Refe	rence			>							
Send E	Email Co	nfirmations									
	Send	Email Alerts									
		Res	ponse Tin	ne							
Contra	acted										
Sche	duled										[]
		Actu	al Respon	se	_						
Hours: T	Fravel		Labor	Total							+
s to Compl	letion									Sub-Total	
									Tax Area	% Tax Amt	
										Price Total	

Ticket Info	On the left of the screen; this is all for info, none is editable at this stage, except Send to Invoicing
Send to Invoicing	this marks the ticket as approved to go to QB for invoicing that night. It also sets the status of the ticket to "Completed". Once the nightly update has taken place, and the ticket has received an invoice number from QB's, the ticket status is changed to "Closed".
Billing Info	Same as in the Customer tab
Time Sheet	This shows all load items for the ticket, including multiple techs and multiple days if the ticket was allowed to go that way; no fields are editable from here. rows with unreturned product are hilited red
time Sheet red flag	if there are unapproved time sheet entries for this ticket, it shows here
Time Sheet arrow	goes to the timesheets relevant to this ticket under timesheet, with the relevant load items pre-selected for each

ĥ

Ticket Close nav

Returnedappears if there are quantities of product expected to be returnedProduct Redthat have not yet been reurnedFlag



Initial found Tickets with a status of "Complete", sorted in creation order **set**

Invoice lines navigation to a ticket, even the first record upon navigation, causes an evaluation of the lines if none yet exist. This happens according to customer prefs: travel and trip charges, per hour or prepay or maintenance contract, and product orders with appropriate discounts. This is all presented for REVIEW, and can be edited extensively at this point. Once sent to invoicing, if it has received a QB invoice number, it will no longer show up here, and is no longer editable.

labor invoicelabor entries need to account for overtime hours as a separate**lines**invoice line.

Ticket Review nav

icket Rev	riew						Create Ticket				
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin				
Ticket Info	o icket No.				<u></u>	Problem	f 6 ≥ 🖳	Timesheets	Inv Cus Msg) Inv Internal Memo	Status History
C Custr Main Contr	Site Site comer PO ntenance ract Type	Custome	r/Site		_						
Tici	ket Date Iled Date Status Severity	Ticket			_						
Tici Probl Te Work Li	ket Type						Product Returns Quantity romised Actual Produ	ict No. Prod	Product Orders	5	
Incoming GNTS Ticket R	Alert ID GNTS No. Outcome					-					
Con Sc	nd Email Confi Send Em Intracted Cheduled	rmations ail Alerts Response Actual Res	Time		_						
Hour: Hrs to Cor	s: Travel	Labor	Tota	1							

initial found set	all tickets for logged in person's location, unsorted (in creation order). If admin, shows all records.
fields	no fields are enterable on this layout.
Status History	sorted descending, so the most recent is at the top
Product Orders - Source	Lists, inventory, or PO # and vendor

Ticket Find pop

Location	All						
Ticket No.							
Date							
Customer/Site							
Ticket Type	Cabling/Wiring						
Problem Level	Acknowledgement						
Problem Type	Call Center Problems						
Problem							
For Multiple Matches, go to: O Detail O List							
Cancel Find							

Location Default - logged in person's location; hidden unless Dallas admin ops mgr is current user

Ticket List pop

			18 Four	nd Tickets			
Location	Ticket No.	Date	Туре	Level	Problem	Customer	^
		-					
		-					
	,						
							₩

Layout Notes List view layout, click a row to select; selection closes window, goes to main window with same found set, sort, and record focus.

Ticket Detail pop

<	2 of 23	>
Ticket No.		
Ticket Date	12/27/2006	
Scheduled Date		
Ticket Type	Service	
Problem Level	Critical	
Problem Type	System Down	
Customer	Plaza of the Americas	
Site	Plaza of the Americas	
Maintenance Contract Type		
Response Time Contracted		
Alternate		
Hours: Travel	Labor	
Rate		
Problem	·	
I		Close

Layout notes form view; click arrows to navigate

Ticket Stats pop

atistics for Dispat	ch for 12	/29/06 fo	r Dallas Loc	atio
Severity	Count	Loaded	Unloaded	
Critical	3	3	0	-
Major	4	3	1	1
Minor	8	6	2	1
MAC	12	3	9	
Acknowledgem	0	0	0	
				-

Layout Notes based on session table

Ticket Prefs pop

Show Tickets in Status	Ready Assigned Dispatched Incomplete		
Show Tickets for Location	O Dallas O Austin O Houston		
	○ All ☐ ? Hover pops detai	Is	
			Done

Show Tickets for Location Filters the tickets and techs; auto enters the logged in Op Manager's location, hides it unless it is the Dallas Op Manager; if changed, automatically triggers the refresh list function

Layout notes based on session table; these settings are stored per user account.

Ticket CreateChooseCus pop

Customer	Thomas Jefferson Elementary	Value List pops up, and once you type, it types ahead to the nearest match, and narrows your choices to potential matching customers
	Cancel	

Cancel closes popup window and returns to the original screen

Ticket CreateChooseError pop



Cancel closes popup window and returns to the originating screen

Print goes to manual print form and prints without dialog to user's default printer, then closes and returns to the originating screen

Customer You can still type into here and try to choose another customer **field**

Ticket CreateChooseSite pop

Site Address Contact Martin Luther King 1111 Elementary Pkwy Dallas Marie Smith Thomas Jefferson 2222 Elementary Pkwy Dallas Jeb Stuart	Address Contact Address Contact rtin Luther King 1111 Elementary Pkwy Dallas Marie Smith omas Jefferson 2222 Elementary Pkwy Dallas Jeb Stuart	nas m	ultiple sites. Click to choo	se a site for this ticket
Martin Luther King 1111 Elementary Pkwy Dallas Marle Smith Thomas Jefferson 2222 Elementary Pkwy Dallas Jeb Stuart	rtin Luther King 1111 Elementary Pkwy Dallas Marie Smith omas Jefferson 2222 Elementary Pkwy Dallas Jeb Stuart >		Address	Contact
Thomas Jefferson 2222 Elementary Pkwy Dallas Jeb Stuart	omas Jefferson 2222 Elementary Pkwy Dallas Jeb Stuart >	King	1111 Elementary Pkwy Dallas	Marle Smith >
		rson	2222 Elementary Pkwy Dallas	Jeb Stuart
				>
				Coursel .
			King	Address King 1111 Elementary Pkwy Dallas Son 2222 Elementary Pkwy Dallas

Customer Field	User can type again into this field and choose another customer; once selected or entered, if the new customer doesn't have multiple sites, it skips this screen.
portal fields	tooltip pops up with contents of field in case the text runs over, with instructions to click the row to select it for the ticket
Cancel	closes popup window and returns to the originating screen
portal fields	Click a row anywhere and it chooses that site for the ticket; the fields are NOT editable on this screen
Add new screen	after this, if this site has open tickets, it should show them, so they can explain when the ticket has been dispatched and cancel. Otherwise they progress to the new different ticket.

Ticket CreateConfirmSite pop

Customer Site	Thomas Jefferson Elementary Thomas Jefferson Elementary
Contact Contact	Edit Choose New
First	Last
Phone Email	
Location	
City/St/Zip Notes/Directions	Service

If a single site customer, this doesn't appear, it assumes the customer IS the site; if a multi-site customer, this appears to give visual confirmation that the correct site was chosen.

- **Contact Tab** The information here is uneditable, meant for review; the primary contact for the site is entered by default
- **Edit Tab** The same info as on contact tab, but editable. This is so it will be clear that you are EDITING the current main contact, not creating a new contact or choosing another existing contact
- **Choose Tab** This is to review existing contacts for the site; click a contact to make them the main contact for this ticket; returns to the contact tab with their information showing
- New This is all global fields, fill them in and click create, and it creates a new contact for that site, and established the new contact as the contact for this ticket; also blanks out the global fields afterwards; once clicked, it retruns to the contact tab with the new information entered
- **Continue** goes to popup window for entering ticket info
- **Cancel** Closes the popup window and returns to the originating screen.

Ticket CreateEnterTicket pop

Cus	stomer	Thom	as Jeffe	rson Elem	nenta	ry		
	Site	Thoma	s Jeffers	on Element	ary			
Maint Ctro	ct Type							
							Print	Ticket
PO#				1	Tech			
Severity	MAC			Labo	r Type			
Туре	Service	9		Wk Lo	cation			
Problem				Incoming A	lert ID			
NTS No.				DIR Elig	gible			
	Send	Email Co	nfirmation	Se Se	nd Ema	ail Alerts		
Р	Send Problem	Email Co	nfirmation Dis	Se Spatch Notes	end Ema	ail Alerts	Product	s
P	Send Problem	Email Co	nfirmation Dis	D Se	end Ema	ail Alerts	Product	s
P	Send Problem	Email Co	Dis	Se	end Ema	ail Alerts	Product	s
P	Send Problem	Email Co	nfirmation	Se	s	ail Alerts	Product	s
P	Send	Email Co	nfirmation Dis	patch Notes	s	ail Alerts	Product	s
P	Send	Email Co	nfirmation Dis	Sepatch Note:	s s	ail Alerts	Product	s
P	Send	Email Co	Dis	patch Note:	s	ail Alerts	Product	5
P	Send	Email Co	Dis	Sepatch Note:	s S	ail Alerts	Product	s
P	Send	Email Co	Dis	patch Note:	s	ail Alerts	Product	5
P	Send	Email Co	Dis	patch Notes	s	ail Alerts	Product	s
P	Send	Email Co	Dis	patch Notes	s	ail Alerts	Product	5

- **Finish** If this is a critical or major ticket, the button changes to say "continue" and when clicked, it goes on to the immediate dispatch popup window. If Customer requires a PO no. and it has not been entered, finish or continue pops a modal dialog alerting to this, and gives the option to print the presently entered info off to a manual print ticket, or return to popup window to enter it. Once the modal dialog is dismissed, the cursor goes straight to the PO# field.
- **Problem** This is from a value list that is in a table, editable by the overall system admin; it does not require dev access to change.
- **PO #** If required, doesn't allow entry until this is filled in. always shows, but if required, says "Required PO" on the field label.

Ticket CreateEnterTicket pop

Finish Once clicked, creates a ticket, assigns a ticket number, assigns the ticket a status of "New", creates a ticket history with a status of New and current timestamp. Also sends out alert emails to Aff staff and customer contacts assigned for that customer.

If severity = critical or major, and no tech is chosen, it goes to status "New" (meaning, it goes into the ticket prep queue).

If it is critical or major, and a tech IS chosen, and there is no product, it goes to status "Dispatched".

if critical or major, and tech is chosen, and there IS product, if the product is in inventory, it removes the product from inventory and sets the status to "Dispatched".

- **Products** add a section to this to add products for the ticket within the wizard
- Tech chooser only appears if severity is critical or major
- **PO Red Flag** shows a red flag if value is required



Send Email If checked, sends a text email confirmation of the ticket number, date, time severity, problem description of the ticket. This goes only to the main customer email.

Ticket CreateDispatch pop

r	itical Ticket Dispatch Technician	- Choose Tech Mbl Phone	nicia Certs	n s Trn's	Current Location	
	David Frost	(333)444-5555	4	16	Thomas Jefferson Elementary	^
	Fred Hamilton	(333)444-6666	3	12	Plaza of the Americas	
	Zed Smith	(333)445-7777	5	10	Backwoods Distillery	
				Car	Finish	

Cancel at this stage, it pops up a warning dialog asking if they really want to throw all this data away and cancel. If yes, closes the window, deletes any entered data, and returns to the originating screen.

Select aDoes nothing except hilite them for the dispatch; action happensTechnician"Finish" is clicked

Finish Sets ticket status to "Dispatched", sends text message email to selecteed technicican with Customer, Address, Expected response time, and problem description. Also sends appropriate notification emails to selected Aff'd and customer parties according to Customer prefs

Timesheet List pop

(no comment)

Timesheet Find pop

Location	Auto-enters logged in persons location; hidden from non-admin persons.
Customer	type ahead value list
Site	Only appears if the chosen customer has multiple sites for the given customer. This is based on the name, so for customers with the same name, this also works.
Tech	type ahead drop-down list of techs for the selected location
Ticket Timesheet print

Daily Technician Time Sheet											
Technician: Ja	ck Frost				Cell F	hon	e: 214	-555-1	212	Date: Wed,	Jan 3,
Customer	Ticket No.	Open Date	Due Date/Time	Est Hrs	Trave	In	Out	Total	Ticket Status	Comments	Miles
										Total Mileage	
										Regular Hrs	
		Su	ipervisor Signa	ture						Overtime Hrs	
										SICK Hrs	

Customer Database field; filled in automatically

Open Date Database Field; filled in from database

Ticket No. Filled in from database

- DueFilled in from databaseDate/Time
- **Est Hrs** Filled in from database
- Travel filled in by tech by hand, later into database
- In filled in by tech by hand, later into database
- **Out** filled in by tech by hand, later into database
- **Total Time** would probably just need to be calc'd by database, doesn't need to be on here

Ticket Timesheet print

Ticket Status	filled in by tech by hand, later into database
Comments	filled in by tech by hand, later into database
Miles	hmmm; this is pure print, I didn't see this in the requirements
regular and overtime hrs	filled in by hand if desired, but once the hours are entered, the database will calc them automatically
total mileage	not in the requirements, so filled in by hand
sick hours	filled in by hand, this is entered on the tech screen
developer notes	this form is printed from a list view per load item, with a header at the top with the technician and phone; it is intended that the script that produces it goes to each tech's items one by one and prints

them to a PDF individually

Ticket DailyInventory print

Daily I Tech: Ja	nventory ck Frost		Printed Wed, Jan 3, 2007
Qty	Product No.	Product Description	
Ticket	33698	Thomas Jefferson Elementary	
5	3067 C	Nortel Phone Junction	
5	3068	Nortel Phone Widget	
5	3069	Nortel Phone	
Ticket	33702	Plaza of the Americas	
5	3067 C	Nortel Phone Junction	
5	3068	Nortel Phone Widget	

DailyThis is a subsummary report by ticket of products; the entire found
set is a single tech's ticket load for a day; this goes out as a PDF in
an email once the ticket has been dispatched

Ticket CustomerTicket print

Work and p this service satisfactory reported to within 48 ho	arts used in co order are cons unless problen ATI service de ours of complet	mpleting ildered ns are partment tion.			Affilia 7	ated Telephone, Inc. 30 Ave. F, Suite 210 Plano Texas 75074 972-423-4222
		Custon	ier Ser	vice C	Order	
Ticket No 59608	Receiv 12/30/	red 2006 11:30 AM	Type Service	Level Minor	Tech Jack Frost	
Custome City of Fo	r rt Worth	Site City Hall	Address 1000 Throc Ft. Worth T	kmorton X 76211	Contact Gary Smith	Phone (817) 555-1212
Problem de	cription goes f	iere				
Qty	Part No.	Description				
Ticket Con Customer / Forms atta HOURS: T Installer S	nplete? Yes_ Advised? Yes Inched for this Travel ignature	No Res ; No Co ticket? (AM/PM)	chedule For: ontact: Arriv In	al Rpt To:	De 1/PM) Out _ Date (Onsite Remote part Rpt To: (AM/PM) Completed:
Customer	Signature					

Product List This is a list of all parts for the ticket; it wouldn't go out unless all parts were on hand, either already in inventory or from a PO

Upper right Comes from the database, for the location that issued the ticket **company info**

Bottom stuff This is all just pasted on the layout, and meant to be filled in by hand

PO Create nav

O Create							Create Ticke	t						
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin							
Create	Temp	Confirmation	Shipped	Review										
	Location					<	2 of 6	> 🔍	т	icket No	b. 33	968 🔍		
	Ticket F	roducto										Broduc	t Courses	
Product No.	Breduct Deser	intion	Cto Cure Day	Qty	014	Broduct No.	PO Lines		Vender	Price		Produc	t Sources	
Product No.	Product Descr	iption	Stocus Hq	a po'd		Product No.	Product Description		vendor	Price	÷	PO/V	/endors	
											ŧ	Vendor	GL Code	-
												Tech Data	📇 t	٥-
												<<	blah2 📇 f	•
											$-\parallel$		At	a
														-11
														-
											$-\parallel$			11
											-11			-11
														-11
											•			
														-11
														-
														11
														-11
														-
												On hand	inventory -	
												- On nand	inventory	
													2274 B	
					- 11							Product No	22/4 D	
					- 11							1		

First Nav to Screen	Within a session, when the user first navigates to this screen, it causes a search for tickets with a status of "PO", which is the found set, sorted by ticket number, and begins on record 1 of that found set.	
No Records Found	Instead of this screen, a screen is displayed which says, there are no tickets needing PO's at this time	
mag glass/Ticket No.	pops up a window with ticket and customer details	0
Nav tickets	Navigate forward and backward through the found set of tickets	<
Ticket Products	A list of products needed for a ticket. The qty Rq'd is the quantity requested to fulfill the needs of the ticket; the Qty Ord'd is the quantity alloted to the ticket in PO lines on this screen, added up, for that product	

PO Create nav

mag glass/ ticket products	selects a product line for the ticket. Hilites the portal, and all arrows in the portal disappear and become nonfunctioning. Arrows appear in the PO/Vendor list, and the On hand Inventory section appears, with the selected product's inventory levels showing. These levels reflect current inventory AND items allocated via this screen that have not been moved from temporary status. Any PO lines for ANY PO for ANY vendor show in the middle PO line portal for that ticket/product line that is selected.	0
arrow/ticket products	Appears when a PO/Vendor has been selected. Creates a PO Line in the middle for that product for the selected vendor. Sets the cursor in the Qty field for the newly created PO Line record. It autoenters the Qty needed to make the Qty Ord'd equal to the Qty Rq'd for the clicked Ticket Product, and when the cursor is in the Qty field at the conclusion of the script, the contents of the field are all selected.	>
ticket products portal	sorts by product number; rows still requiring source allocations (the Qty Rq'd > Qty Ord'd) hilite red, unless it has been actually selected with the magnifying glass, in which case it hilites yellow. If the Qty Rq'd = the Qty Ord'd, the row hilites green, unless it has been selected with the magnifying glass, in which case it hilites yellow. The product description has a tooltip which pops up more info only if it has truncated. Also, no fields in the portal are editable, and a normal click selects the row, whereas a shift click serves to move the item to a PO line, the same as clicking the arrow.	
PO lines portal	The Qty field is editable, all others are not enterable. If it is on hand inventory, it reads "Inventory"	
trash can	deletes a portal row; for PO lines, deletes that PO line record; for PO/Vendors, deletes that PO, and cascade deletes the PO lines associated with it.	Ō
trash can arrow/PO/V endors	deletes a portal row; for PO lines, deletes that PO line record; for PO/Vendors, deletes that PO, and cascade deletes the PO lines associated with it. appears only if a Ticket product line has beeen selected with the magnifying glass, otherwise simply does nothing. When clicked while active, a PO line is created for the selected ticket product for that PO for that vendor, and the cursor lands in the Qty field of the new PO line record. Shift click anywhere on the portal that is not otherwise occupied by a button does the same thing. It autoenters the Qty needed to make the Qty Ord'd equal to the Qty Rq'd for the selected Ticket Product, and when the cursor is in the Qty field at the conclusion of the script, the contents of the field are all selected.	
trash can arrow/PO/V endors mag glass/ PO/Vendors	deletes a portal row; for PO lines, deletes that PO line record; for PO/Vendors, deletes that PO, and cascade deletes the PO lines associated with it. appears only if a Ticket product line has beeen selected with the magnifying glass, otherwise simply does nothing. When clicked while active, a PO line is created for the selected ticket product for that PO for that vendor, and the cursor lands in the Qty field of the new PO line record. Shift click anywhere on the portal that is not otherwise occupied by a button does the same thing. It autoenters the Qty needed to make the Qty Ord'd equal to the Qty Rq'd for the selected Ticket Product, and when the cursor is in the Qty field at the conclusion of the script, the contents of the field are all selected. selects a PO/Vendor for the ticket. Hilites the portal, and all arrows in the portal disappear and become nonfunctioning. Arrows appear in the Ticket Products portal list. PO lines for that selected PO which has been assigned a vendor appear in the PO Lines portal in the center of the screen.	

PO Create nav

Print Icon first selects the PO as if the magnifying glass icon had been clicked. Then prints the PO to the user's default printer for review without a dialog.



- **On hand Inventory** This section disappears if a PO has been selected; The Qty field is uneditable and reflects the current free inventory for a selected Ticket Product minus any PO Lines temporarily created via this screen. Inventory received that is tagged for a specific ticket is NOT included in this total, only inventory received that is not tagged for a certain ticket is included in this amount. The Qty is filtered to the selected location, and cannot be altered to show all inventory for any location.
- arrow/On
 hand
 Creates an orphaned PO line record (it is a line which is not connected to a Vendor PO). The Vendor field in the PO Line portal will show "On Hand Inventory". Once clicked it creates a PO line entry for the selected Ticket Product, and enters either the Qty Rq'd for that line if there is enough on hand inventory, or else enters all the rest of the on hand inventory.
- View ListPops up a window of a list of the found set of tickets, with info
peculiar to the creation of PO's in the list.
- View TicketPops up a window with certain details about the current PODetails
- **DIR flag** shows if the current ticket has DIR flag turned on.









DIR Ticket

PO Temp nav

stomer	Ticket	PO	Inventory	Vendor		Product		Staff	Admin							
Create	Temp	Confirmation	Shipped	Review						!						
nporary	γ ΡΟ΄	S					<	2 of	6 >	₹.						
Send Back									Post						F	rint
		PO Information								PO Lines	5					
					No.	Qty		Product No	Product D	escription	Vendor No.	Unit \$	DIR %	WPP %	Extended	\$
Р	O No.						2									
Tick	cet No.															
Cus	stomer			-	<u> </u>											
DIRE	ligible															
Reseller \	/endor															
Accounting	g Code															
Date Requ	ested															
Date Re	quired															
V	endor															
Reques	ted By															
Shipping R	equest				-											
	Terms															
Invo	oice To			-												
PO Note	s															
					<u> </u>											
					<u> </u>											
																—Ц
																-

- **Post** sets the status not temporary (posted); also sends it as an email to vendor
- WPP\$ looked up from the product catalog table
- **WPP%** manual entry, auto-enters from last visited record; "9" means .09, 9%
- unit\$ wpp\$ * wpp%

THERE SHOULD BE A GLOBAL SETTING FOR THE STANDARD WPP DISCOUNT (RIGHT NOW ITS 9%) WPP\$ IS PULLED FROM THE NORTEL PRODUCT CATALOG, SAME FIELD WPP% IS PULLED FROM THE GLOBAL SETTING AS JUST INDICATED ABOVE UNIT\$ - THIS VALUE IS WPP\$ *(1-WPP%) WILL NEED TO CONVERT % TO DECIMAL, EX 9% IS .09 EXTENDED \$ IS UNIT\$ * QTY

PO Temp nav

DIR Eligible	shows this from the ticket, but not editable.
Ship to	auto-enters for location, but can be overwritten
Provider	this is actually from the customer table; if not checked, the customer field looks up the customer and site names, and address; if checked, it blanks this out and someone types it in manually here
shipping request	auto-enter "best way"
terms	auto-enter net 30
ship to	auto-enters for the ticket's office location, but can be overridden
Post	changes PO status, and creates PDF of PO; creates email in local machine's email client with attachment.
Requested By	dropdown list of all staff; can be overridden manually; enters a textual value, not relational key

PO Confirmation nav

Customer	Ticke	et	PO	Inventor	y .	Vendor	Product	Staff		Adm	iin		
Create	Tem	p	Confirmation	Shipped		Review							
						<	2 of	6 >	<u>=</u>				
O Info										Date		onfirmation No	+
	PO No.	1007							0	1/16/20	007 33	445566	
	Vendor	Tech Dat	а						0,	1/9/200	07 33·	445555	1
т	icket No.	30791							<u>_</u>				
	Contact	Matthe	v Mark										
	Phone	343-45	4-5656										
	Email	matthe	v@techdata.co	m				Cor	nfirm Al	н –			
Number	Inquiries	3	_					Coffd	-Quantit		- Broduct No	Product Description	Vendor Product
	inquires							3	onem	3	3386 B	Phone Connector	2222
								-					
								3		6			
nquiries Date	Metho 07 Email	od Sub	ject RE's MY STUF	F??!!!				3 7		6 7			
inquiries Date	Metho 07 Email	od Sub	ject RE's MY STUF	F??!!!				3 7		6 7			
Subject	Metho 07 Email Here is a	od Sub WHt	ject RE's MY STUF	F??!!!	tech on	1		3 7		6 7			
Subject	Meth 07 Email Here is a	od Sub WHI	ject RE's MY STUF eet note ent	F??III ered by a	tech on t Messa	1line ge		3 7		6 7			
Inquiries Date 1/7/20 Subject Message Incomple	Metho 07 Email Here is a	od Sub WHI	ject RE's MY STUF eet note ent	ered by a	tech on t Messa	tiine ge				6 7			
Inquiries Date 1/7/20 Subject Message Incomple	Metho 07 Email Here is a	od Sub WHE	ject RRE'S MY STUF	ered by a	tech on t Messa	tiine ge				6 7			
Subject Incomplete	Meth 07 Email Here is a	od Sub WHt	ject RE's MY STUF	ered by a	tech on t Messa	tine ge				6 7			
Subject	Metho 07 Email	od Sub	ject RE's MY STUF	ered by a	tech on	tine ge				6 7			
Inquiries Date	Metho 07 Email Here is a ete	od Sub WHU	ject RE's MY STUF	ered by a	tech on t Messa	tine ge				6			
Inquiries Date	Metho 07 Email	od Sub WHE	ject RE's MY STUF	F??III ered by a	tech on t Messa	tine ge				677			
Inquiries Date 1/7/20	Meth 07 Email Here is a ate	od Sub	ject RE's MY STUF	ered by a	tech on	tine ge				6			
Inquiries Date	Meth	timesh	ject RE's MY STUF	ered by a	tech on	tine ge				6			

Navigation	When you first navigate to this layout in a session, it finds the list of PO's that are open that have not been completely received, and establishes that as the found set.	<	2 of 6	> 🔍
List Popup Window	Clicking this icon pops up a window with the list of open unconfirmed PO's	₹		
Send Back	If a certain item is not going to be confirmed, it can be sent back to the ticket and reallocated to a different PO for a different vendor	?		
Set Message	automatically creates an inquiry message, with a subject which references the PO no., and a message which references the all the line items and quantities in the PO, and the expected arrival date as well as the PO date.			
Email This	Creates an email with the subject and message indicated. It also attaches a PDF to the email of the PO and sends the email via the local user's email client, NOT SMTPit.			
Trash Can	deletes a history item, incase something was added by mistake	đ		

PO Confirmation nav

History portal	hovering over a subject causes a tooltip with the message to pop up.	
Add History Item	Creates a new history item, takes user to the message tab to fill in the details. Also has a menu item and key command on this layout for this function.	+
Inquiry mag glass	selects an inquiry to see its details directly below	0
send email	goes through local machine client, not SMTPit; creates PDF of PO and creates email but doesn't send it, presents it for further editing before sending.	Email This
select confirmation	once selected, the numbers in the cnf'd column under the lines change to reflect the values entered only for that confirmation. These values start off blank, and are entered via a create relationship.	
confirm all	Sets the unconfirmed qty into the cnf'd qty for all lines; afterwards, the uncnf'd qty will all be 0.	Confirm All
Add Confirmation Record	adds a record to the portal, navs to the new record, leaves cursor in the confirmation no. field, auto-enters today's date	•
Set Message	sets the message from default text according to the admin/global page setting	Set Message

PO Shipped nav

°O Shippe	ed						Create Ticket	£	
Customer Create	Ticket _{Temp}	PO Confirmation	Inventory Shipped	Vendor Review	Product	Staff	Admin		
Select P	O No.								
PO Info					PO Lin	es			
	Vendor					Shipped Ord'd	Product No.	Product Description	Vendor Product No.
Confirm									<u> </u>
Confirmat	tion Date								
Shipments									
Car	rier			-					
Tracking	No.			_					
Ship Met	hod								
Est'd	Rcv								
Corrier	Ter	oking No F	hin Mothod	Fat'd Bay	•				
<_			mp Method	<u> </u>	- -				
					- -				•

Select PO No. Drop down list of open PO's with product yet to ship

- **PO Info** Fills in automatically, uneditable
- **Shipments** Large fields at the top are initially blank, and typing into them automatically creates a new shipment in the list below and selects it.
- Add Adds a new shipment line, selects, and makes it the active fields for editing above. Not needed unless two shipments are entered in the same user session for the same PO.
- select hilites portal row, makes the data in that row's fields visible and editable above, and shows the quantities shipped for that shipment in the PO line portal to the right.

shipment none of these fields are editable
portal row

0.

PO Shipped nav

delete shipment portal row	doesn't allow deletion if not created in the same session as the current one.Pops a modal dialog confirming desire to delete. Selects most recent shipment if any.
PO Line	Only the "Shinned" field is editable, and is unique to the selected

- **PO Line** Only the "Shipped" field is editable, and is unique to the selected shipment. The others are from the PO lines as entered, and are uneditaable.
- **Conf#** Value list of conf# for PO; ship from conf autoenters same qty's as that conf set.

PO Review nav

PO Review					Cre	eate Ticket						
Customer Ticket	PO	Inventory	Vendor	Product	Staff	Admin						
Create Temp	Confirmation	Shipped	Review									
PO's				< ح	2 of 6	> ₹	L					
	PO Information			PO Lines		Cont	firmations	5	hipments		Ŷ	Receiving
PO No. Ticket No. Customer			_	No. Qty	Product No.	Product De	scription	Vendor No.	Unit \$	DIR %	WPP %	Extended \$
DIR Eligible Reseller Vendor												
Date Required												
Requested By												
Shipping Request Terms												
Invoice To												
PO Notes												
				L				PO	Amount			<u>1*</u> _

Initial found all records for logged in person's location; if admin, shows all. unsorted.

Date is this Required

PO TicketList pop

layout comments	This is a list view based on the same TO as the PO Create table; It is a list view, not a portal; when opened, resizes down automatically appropriate to the number of rows required.
List row	No fields are editable; clicking a row closes the popup window and takes you to that record in the main screen under the PO/Create tabs
Date	This is the ticket creation date
Prd Qty	This is a composite calculation per ticket of the number of ticket product lines still needing allocation of PO lines or inventory
completed	this means that all ticket product lines have had products either allocated from inventory or assigned to a PO
options for layout	no find view; not in table view; simplifed menu set

PO TicketDetail pop

	Ticket Detail	
Ticket No.		
Cust	omer	
	Site	
Custome	er PO	
Mainten Contract	ance Type	
Ticket	Problem	Dsp Note
т	icket Date	
Schee	duled Date	
	Status	
	Severity	
т	icket Type	
Pro	blem Type	
	Technician	
Wor	k Location	
ı	.abor Type	
I	Labor Rate	
Ticket	Reference	
Incomir	IG AIETT ID	
GNT	S Outcome	
Send Email Con	firmations	
Send Er		o Timo
Contracted	Sched	uled

(No Notes)

PO Find pop

Ticket No.								
PO No.								
Confirmation No.								
Tracking No.								
Vendor								
PO Date								
Shipping Date								
Aff Prod No.								
Vendor Prod No.								
For Multiple Matches, go to: O List								
Cancel	Find							

Cancel Closes window, returns to original screen

Find If only 1 match, goes to original screen with that one record showing and only it in the found set. If multiple matches, if the detail is selected, closes the window and goes to the original window with the matching records in the found set, and record one showing. If List is selected, stays in the same popup window but goes to the PO list selector popup window.

PO Temp print

			PL	JRCHAS	E ORDER			
Charg	ge Acc	ount Num	ber	Requ	ested By			
3369	8			Terri I	Huxley			
Affili 730	ated T Avenu	elephone, e F, Suie 2	Inc. 210		PO#: Affiliated Telepho	one, Inc.		
972- 972-	0, 1X / 423-43 422-98	222 - Voic 867 - Fax	e X4003		Job # Name: Critical			
					Req #:			
Date	Reque	sted	Date Requ	ired	Shipping Inst:		Т	erms
Tue,	1/2/20	07			Dallas		N	VET 30
Vend	or Nan	ne:			Invoices To:	CEE A	BOVE	
					Shin To:	SEE A	BOVE	
					Ship to.	SEE A	BOVE	
					□ Tax	Exempt	Taxab	le
No.	Qty	Part Nu	mber	Descriptio	on	U	nit Cost	Total Cost
Detai I	12	740-5003	80-01	8 Channel 1	IDVR		1,395.00	11,160.00
Detai I	12	740-5003	80-01	8 Channel 1	IDVR		1,395.00	11,160.00
Detai I	12	740-5003	80-01	8 Channel 1	IDVR		1,395.00	11,160.00
Detai I	12	740-5003	80-01	8 Channel 1	IDVR	[1,395.00	11,160.00
Detai I	12	740-5003	80-01	8 Channel	IDVR		1,395.00	11,160.00
Vend	or Ord	er #:		Plea	se Confirm Recei	pt		29,227.00
Confi	rming	то:		On:	B	y:		
Via:								
				SIGN	ATURE:			

Layout Explanation This is a list view layout based on the PO Temp line item table. The header info we see here is in a Title Header; there will also be a smaller normal header which will show only the PO# and ppage number

Customer is If the customer for the ticket is a provider (billing_provider = 1); hide all customer information on this form

Inventory Return nav

Inventory Return Customer Ticket PO Inventory Vendor Product Staff Admin Return Receive List Ticket Number Product No. Product Description **Qty: Expected Returned**

TicketA drop down type-ahead Value List, filtered to tickets that are in the
status of Dispatched, Incomplete, or Completed, and have
unreturned but expected equipment.

- **Product**Only the Returned Qty field is editable; it is a create relationship to
teh inventory table for this ticket, lline item, and date.
- Date not shown here, it is always today.
- Bad If bad, doesn't enter it into inventory

Inventory Receive nav

ntory	Rece	ive						Create Ticket
omer	Tic	ket	PO	Inventory	Vendor	Product	Staff	Admin
Return Receive Review				u				
РО	No.							
Ticket	No.				v	endor		
					Estimated	Date		
Receiv	red	Expected	Product No.		Product Descripti	on		Vendor Product No.

- **Tracking No.** Drop Down Value List, type ahead, filtered to shipments that have been entered but not received
- **PO lines** Only shows the lines expected on that shipment; teh expected number is not the PO qty, but the expected to ship qty from the PO/Shipped screen. Numbers entered here automatically go into inventory for that product.
- **Ticket status** If all product for a ticket has now been received, a change in the ticket status is triggered to "Ready", placing it in the dispatch queue.
- Use PO No.Jan 16, 2007 Rudy: all shipments don't get track no's, and they careas lookupmore about tying it to a PO than a shipment.
- **QB** enter shipments into QB with PO info reference so it will know what is being paid for on an invoice from vendor...
- **received** background is gray if all is received, and value cannot be edited; background is white if editable.

Inventory Receive nav

PO type If the PO is linked to a ticket, the inventory is logged only against that ticket, and is not available as general inventory; if it is a PO created independently of a ticket, it enters general availability as inventory for any ticket.

Inventory Review nav

PO Review	Inventory	Vendor	Product	Staff	Admin			
Review								
	5							
-								
Date	Number	Description		Cost	Status	Ticket No.	PO No.	
		1		I				
-								

Initial found	all records, sorted by date descending, for the logged in person's
set	location; if admin, shows all records

Status Refurb, Bad, New

Cost Looks up cost from the product table

Free If it is not connected to a ticket, it is free inventory. If it is bad, it does not belong to free inventory. If it comes back repaired, it is refurbed.

Inventory Find pop

(no comment)

Vendor Info nav

ndor In	fo							Create Ticket
stomer	Ticket	PO	Inventory	Vendor	Product		Staff	Admin
						<	2 0	f 6 > 🔍
Vendor						Contac	t Info	
	Vendor Name					Vend	dor Phone	e
Ac	count Number					Web	Address	
	Description				_		Contact	t
						Cont	act Phone	e
						Cont	tact Email	1
Address	• • • • • • • •				_			
	Address					PO's		
								Confirm PO
E	Billing Address				_	Pret	ferred De	livery Means
								PO Email
Shi	pping Address				-			PO Fax
	ļ							
Miscella	neous							
	reseller							
	subcontractor			_				
	1099	•		-	These value	s show	only if	
	Insurance Info	• •			subcontract	or is che	ескеа	
	Tax Exemp	t 🗖						
	Tax II							

initial found show all records, unsorted (creation order)
set

Vendor List pop

	18 Found Vendors	
Vendor		*
		V

Q: list fields Do there need to be more fields in list view beyond just the vendor name?

Vendor Find pop

Vendor	
For Multiple Matches, go to: O Detail O List	
Cancel Find	

search fields Do there need to be more fields to search on for vendors?

Product List nav

Customer Ticket Po Inventory Vendor Product Staff Admin	Product	List							Create Tick	et						
	Customer	Ticket	t P	O Inv	rentory	Vendor	Product	Staff	Admin							
	List						1									
	Туре	Sub-Type	Model No.	Subst Model	No.		Description	, 🖗		Aff \$ F	Refurb \$	MSRP	WPP	CISV	Inventory	∧
	1			1	I					I	I	I	I	I	I	
V																Y
																-
			_													
initial found all records, unsorted	initial	l foun	n d a	all reco	ords,	unsort	ed									

sub-type A value list, type-ahead drop-down, based on values in the field itself.

Inventory This means, in inventory, FREE from ticket association. If Product has arrived that is meant for the fulfillment of a ticket, it does not figure into this number.

Product Find pop

	Find Products	
Туре	33698	
Sub-Type	Terri Huxley	
Model No.	Affiliated Telephone,	_
Subst Model No.	Critical	_
Description	Dallas	
Canc	el	Find

(no comments)

Staff Info nav

Staff Info							Create Tic	ket			
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin				
Info	Out	Certs									
Staff Info				9	< <	2 of 6	> 🔍]	
Fir	st Name							Birth Date			
La	ist Name							Cargo Coverage			
Affiliated	Location						Dispatch Pri	nt Date Preference			
Dep	partment	Technician					Driver's	License Expiration			
	Title						Driver	's License Number			
	nce						Insurar	ce Incident Phone			
		Set FileMak	er Login					Labor Rate Type			
							0	fice Security Code			
							Vehicle Boo	filv Injury Liability			
Email Settings	5					Vehicle B	odily Injury A	gravated Liability			
	Emai	1					Vehicle	Property Liability			
Text N	lessage Emai	1					Vehicle Ide	ntification Number			
	SMTP Mail Se	rver					Vehicle	Insurance Carrier			
							Vehicle In	surance Expiration			
		Set SM	TP Account			`	renicle Insura	Vehicle Make			
	Use							Vehicle Model			
	Auth	Туре									
L						Admir	n Comment				

Set login pops a modal dialog with a user and password field to reset the user's account and password. Sets the privilege set based on the department

Set SMTP pops a modal dialog with a user and password field to reset the user's email account and password.

Staff Out nav

ustomer Ticket PO Inventory Vendor Product Staff Admin Info Out Certs Location Dallas Technician Jack Frost								Create Tick	tet
Location Dallas Technician Jack Frost	ustomer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin	
Location Dallas Technician Jack Frost	Info	Out	Certs					u	
Type Begin Date > Begin Time End Time End Date > Begin Time	Lo	ocation	Dallas		Tech	nnician Jac	<pre>< Frost</pre>		

raining	Won, 1/8/07	N N	7:00 AM	12:00 PM	Won, 1/6/07	IVI	7:00 AN	12:00 PM	L L
acation/	Thu, 2/15/07	W	7:00 AM	6:00 PM	Thu, 3/1/07	W	7:00 AM	6:00 PM	ť
									t

Location Chooser	New session login auto-enters user's default location; hidden except for Dallas admin Op Mgr and purchasing/accounting user	
Technician Chooser	type ahead value list of active techs for the chosen location	
add leave time	creates a new leave record for the selected technician, and goes to the new record, which is always at the top of the list, with the type popped up ready to choose.	•
Begin and End date	pops up a calendar chooser	
End Date	if blank, autoenters the same date as the begin date; if not blank, remembers the number of days between, and auto-enters a new date that is the same number of days between; Also, if training, auto-enters same date as begin, if vacation or sick, leaves it blank.	

+

Staff Out nav

>	whole day, morning, or afternoon; causes times to enter for begin time and end time in accordance with admin prefs for these selections; if dates are different and > is blank, auto-enters whole day
> - end date fields	if the end date is the same as the begin date, autoenters the same value and causes the times to auto-enter; if different, auto-enters $\rm W$
Begin Time/End Time	Auto-enters values from the > selection, set by the admin in the admin section for these selections; can be edited
delete	Only allows if the item is in the future

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Staff Certs nav

. . . .

Info	Ticket Out	PO Certs	Inventory	Vendor	Product	Staff	Admin		
		Technician				Tra	ining	Cert	fications
L	ocation	Dallas			Technicia	Jack	Frost		
						4	0		
	Inderwater	Jrse Baskot Woaving	7	Date 6/15	/2005 #	• •	Vortel Service Tech 42	Date 2/1/2005	2/1/2007
	Cilderwater	Dasket Weaving	9	0/13	12000 [Nortel Service Tech 42	6/15/2006	6/15/2008 💼
					-	71			
						41			
						11			
						11			
						11			
						41			
						41			
	<u> </u>								
						11			
						11			
						41			
						41			
						41			
	1								

Whole layout defaults to the technician tab

training or	adds a new training course record, selects it in the portal, and goes
certification/	to the Training Course field in the detail area t the right
add	

0,

Ш

training orclick the magnifying glass icon or anywhere on the portal row tocertification/select; hilites the chosen record and shows details about the courseselectand attendees to the left.

training or	for the selected course, adds an attendee; once record is added,
certification/	goes to the new portal row and enters the the tech selection field,
tech/add	which pops up a value list of staff filtered by which staff are techs for the chosen location; autoenters most recently visited record's date.

training or
certificationchecks to see if there are any related tech join records, and if so,
aborts. Otherwise pops a modal dialog confirming intention to
delete, then deletes record.

Staff Certs nav

training or certification list portal	sorts with most recent tech assignments at the top, otherwise in creation order
Location Chooser	Auto-enters logged in user's location; Appears ONLY for Dallas operation manager admin user; otherwise,otherwise hidden. This affects the filtering of the technician choosing value lists, and the number of current techs under training and certs.
Tech assignment delete	under any tab, doesn't delete the tech, but the tech's assignment to a training or certification. Pops a modal dialog confirming desire to delete, then deletes.
Certification/ Exp Mo's	This means, the number of months before the expiration expires.
Technicians/ Tech chooser	type ahead value list filtered to active techs for the selected location.
red flag	indicates that a certification item will expire in 1 month or less; for certification recordds themselves, indicates that the current number will dip below the required number in 1 month or less.
Certification/ Product selection	uses the same product selection schema as other screens -> drop- down type-ahead value list of either prod no. or prod descr., auto enters the other one

ĥ

Staff Find pop

	Find a Staff Member
Affiliated Location	Dallas
Department	Technician
Name	
Admin Comment	
Training	
Certification	
Cert is Current	
	For Multiple Matches, go to: O Detail O List
	Cancel Find

Location Auto-enters logged in user's location; only appears for Dallas admin op mgr

Training/Cert Only appear if Department = "Technician"

Staff List pop

18 Found Staff Members

Location	Department	Name	Title	٨
Dallas	Technician	Jack Frost	Senior Engineer	
Dallas	Technician	Jack Frost	Senior Engineer	
Dallas	Technician	Jack Frost	Senior Engineer	
Dallas	Technician	Jack Frost	Senior Engineer	
Dallas	Technician	Jack Frost	Senior Engineer	
Dallas	Technician	Jack Frost	Senior Engineer	

comments list view layout; click a row to select; selection closes window and takes you to the original detail screen with that staff member showing, with a found set like the list.

Admin Locations nav

						l	Create Ticket	
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin	
Locations	Global	EventLog	Audit					
City	Dispatch	Company	Return E	Email Address	Address			
Path to QB file			I					
Path to QB file								
Path to QB file		I						
Path to QB file								
Path to QB file								
Path to QB file								

initial found shows all, creation order (unsorted)
set

Dispatch Are there situations where the dispatch city is different than the location's city? Do
Admin Global nav

.

Admin Global	Create Ticket	
Customer Ticket PO Inventory Vendor Produ	ct Staff Admin	
Locations Global Nightly Audit		
		Y
Lookup Tables	Email Settings	Value Lists
Rates Sales Tax 8.25%		
Order Labor Type Rate Travel Rate		
2 Skilled technician 25.00 B Remote		
Markup - Maint Cust		
WPP %		
DIR %		
Problem Level/Response Times		
Order Type Hours		
Technician 20 m ≜		

Email settings	if User Settings is selected, the admin settings just below disappear; if Admin Settings is selected, they appear. Also, on the staff info page, if the admin settings is clicked, those options disappear from there as well.
VL notes: Departments	This is pretty well built in, and should not be flexibly done in a table on this page
VL notes: how they work	For popup menus, the real value entered in a value list is going to be the ORDER number. This is going to be set as unique per table. There will be a separate table per value list and lookup table. That way the value list will show show in the chosen order. Then the true value can be entered via the relationship. For dropdown lists, it will generally be a textual type-ahead list, which then performs a lookup to get the true value.
Resonse Time	The requirements definitely seem to be asking for something additional here.

Admin Global nav

Other valueIf a value list doesn't show up here, it can be set as a normal set-in-
stone value list. Remember that any value list that is editable will
lose its user entered setting upon update unless it is set up as a
table that can be imported.

ProblemThis is a bit tricky. I haven't got it figured yet...LevelResponseTimes

Admin EventLog nav

5	2							Create Ticket
Customer	Ticket	PO	Inventor	у	Vendor	Product	Staff	Admin
Locations	Global	Nightly	Audit					
luickbooks Nigh Run Date	tly Update New Cust	New tomers Invoices	Customers Updated	Errors				
					^			
					-			

Nightlysorted with most recent to the top; one record per day, showsportalstatistics for nightly run.

Admin Audit nav

Admin Audit

Admin Au	ait						Create Ticket	
Customer	Ticket	PO	Inventory	Vendor	Product	Staff	Admin	
Locations	Global	Nightly	Audit	·				
able	Timesta	mp	Change					
	Ì		1					

initial found shows last 7 days of changes, sorted with most recent to the top. set

description this is a raw list of all changes made to all fields in all data tables in the database.

Timesheet_Detail_iwp

		Weld	ome Jack Frost			
Date 1/2/20	07 < 2	of 24	> Ticket No.	33698		
	Thomas Jefferson El	ementary				
Travel T	ime 8:45 AM	Begin Time	9:30 AM	End Time	11:30 AM	
	Notes		ſ	Returned	d Products	
				Qty	Product No.	
Product Type	Type 1	0		3	33700	
Sub Type	subtype 2		>			X
Product No.	33700 - Nortel Phone					
Quantity	3					
						— <u> </u>
				L		
			Enter			

IWP	This layout must work for Instant Web Publishing. The graphics may invert, and value lists must work correctly. When it is first navigated to, it must enter a field to force it into edit mode. Record navigation must accomplish the same thing
Date	Defaults to today, can't navigate to timesheets for more than 3 days ago. Also can't go forward past today.
Ticket No.	Non-editable
Site	Composite of Customer, and if different, the site, with a forward slash between them
Notes	tech notes specific to this time sheet
Return Products/Pr Type	A VL of all product types
Sub Type	Filtered VL of all sub types for the selected product type

Timesheet_Detail_iwp

Product	Filtered VL of all products for the selected type and sub-type; VL also shows product descriptions out to 30 chars, but enters only the product number into the field	
Arrow button	moves the selected product into the returned product list; also submits the form	
Returned Product Portal	no fields in this are editable; they can delete records and redo them only.	
mag glasses	submits the form to filter the next value list; if they go back and change the Product Type, it blanks our sub type and forces them to resubmit it.	0
Rethink product entry	they will already know what the product number is, so have a way for them to simply enter that.	