

Web Booking System Changes (for TOMs and BDMs)

The "Quote and Do" job state has been replaced by "Booked Quote" job state. The Quote number required to finish the job in the IPAD is the Quote No. generated when the technician completes the quote form in Four. This means that all technicians doing Quotes must complete the quote forms in Four to finish Quote Request jobs.

Book Quote button

The Book Quote button has been added. This button will only appear if the job state is "Quote Request."

Customer Details ■ No Booking **Job State** Quote Request

Account No: Invoice No:

Home Phone: Mobile: Work:

Title: First Name: Last Name: Company:

Street Address: Post Code: Suburb: State:

Zone: Email: ☐ No Email ☐ Exclude From Mailing List

Customer History:

Date	QuotedPrice	Actual	JobType	Comments	Job Notes
20/10/2022	***** \$50.00	***** \$0.00	Tg0**	*****	quote for 1 k h parking in the driv

☐ Job Address is different to billing address

Contact Phone No: Title: First Name: Last Name:

Street Address: Post Code: Suburb: State:

Job Details

N07 NORTH JAMES W MOULD [ACC] TILE 7:30-3PM \$1250 ☒ Informed customer of terms and conditions

Start Time: End Time: Date: Thursday Lead Source: Promotion:

Job Cleaning Type	Qty	Price	Payment Type	Amount	Date	TxnId	Quote Cleaning Type
Tile and Grout Quote*****	1*****	\$50.00					

Total Sch. & NonSch. \$: **Quoted Price \$:** **Total Payments \$:** **Account \$:**

Customer Rating (1 - 5)

Call customer on:

☐ Proceed with Caution Client

Customer relevant comments: 2000 characters remaining

Internal Job Notes: 1064 characters remaining

Confirmation E-mail Notes: 953 characters remaining

Change Notes:

Created By: Marie Tuballas CC On: 14/10/2022 At: 3:13 PM
Modified By: Lexie Briones CC On: 19/10/2022 At: 12:00 PM

- The book quote button can only be used when booking a converted quote job. Click the button to go to the Daily Reservation Page and look for a spot.

Customer Details

No Booking

Job State

Quote Request

Close

Save

Transfer

Cancel Job

Search Customer

Account No:

Invoice No:

Home Phone:

546235

Mobile:

546235

Work:

546235

Title:

Mr

First Name:

Test

Last Name:

Booked Quote

Company:

Street Address:

1 Booked Quote Test Rd

Post Code:

2298

Suburb:

WARATAH

State:

NSW

Zone:

1

Email:

☒ No Email

☐ Exclude From Mailing List

Customer History:

Date	QuotedPrice	Actual	JobType	Comments	Job Notes
20/10/2022****	\$50.00****	\$250.00****	TgQ*	*****	

Go

☐ Job Address is different to billing address

Contact Phone No:

Title:

First Name:

Last Name:

Street Address:

Post Code:

Suburb:

State:

Job Details

TEST RUN

☒ Informed customer of terms and conditions

Start Time:

8:30 AM

End Time:

9:30 AM

Date:

20/10/2022

Thursday

Lead Source:

Promotion:

Job Cleaning Type	Qty	Price	Payment Type	Amount	Date	TxnId	Quote Cleaning Type
Tile and Grout Quote*****	1****	\$50.00	CreditCard*****	\$250.00***	20/10/2022****	2143*****	
DepositPaidToTechnicians*****	1****	\$200.0					

Delete Type

Add Type

Delete Payment

Add Payment

Delete Type

Add Type

Total Sch. & NonSch. \$:

250.00

Quoted Price \$:

50.00

Total Payments: \$

250.00

Account: \$

.00

Customer Rating (1 - 5)

0

Call customer on:

☐ Proceed with Caution Client

Customer relevant comments:

2000 characters remaining

Internal Job Notes:

2000 characters remaining

Confirmation E-mail Notes:

1996 characters remaining

Change Notes:

Save

Generate Invoice

Extend

Book Quote

Created By: Kylie Ilao CC On: 20/10/2022 At:10:17 AM

1 Job Photos [view](#)

iPad Completion Details [view](#)

Daily Reservations

Add Resource to Current Day

Remove Resource from Current Day

Close

Expenses

<div><div><div></div><div>View Map</div></div><div><div>ACCOUNTS/JPAD</div><div>ISSUE RUN</div><div>Week View</div></div></div>	<div><div><div></div><div>View Map</div></div><div><div>CANX</div><div>DEPOSIT</div><div>Week View</div></div></div>	<div><div><div><div><div></div><div>View Map</div></div><div><div>A.CC North</div><div>BLAKE H</div><div>MOULD</div><div>TILE/ACC</div><div>5 JOBS ONLY</div></div><div>Week View</div></div></div></div> <div><div><div></div><div>View Map</div></div><div><div>A.CC North</div><div>BLAKE Z</div><div>7:30-3</div><div>ACC/MOULD</div><div>TIMBER</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>A.N02</div><div>CC&SOUTH</div><div>ADRIAN</div><div>T&G MOULD</div><div>ACC</div><div>8:30-3:00</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>A.N02.3.4</div><div>ADAM</div><div>MOULD/TIMBER</div><div>NO UPHOLS</div><div>7:30-3:00</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N01.02.03</div><div>BRANDON</div><div>(NEW) 4</div><div>JOBS ONLY</div><div>7:30-3PM</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N03</div><div>WEST</div><div>LUKE K</div><div>7:30-3:00</div><div>ACC</div><div>\$1250</div><div>JOBSMAX</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N04 TOM/DAVID</div><div>MOULD PCT/GO/QUOTE</div><div>ACC</div><div>\$ 30-3:00</div><div>\$1000</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N05 NIAM</div><div>MOULD</div><div>ACC</div><div>JOBSMAX</div><div>7:30-3:00</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N05,N06,N09</div><div>MATTHEW G</div><div>ACC 7:30-3:00</div><div>JOBSMAX</div><div>\$1250</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N07 NORTH</div><div>JAMES W</div><div>MOULD</div><div>ACC</div><div>TILE 7:30-3PM</div><div>\$1250</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N07.10</div><div>NORTH</div><div>BEN</div><div>MOULD</div><div>7:30-3:00</div><div>JOBSMAX</div><div>\$1250</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>N08</div><div>STEPHEN</div><div>TILES</div><div>MOULD</div><div>ACC</div><div>7:30-3:00</div><div>\$1250</div></div><div>Week View</div></div>	<div><div><div></div><div>View Map</div></div><div><div>SCONE/MUSWELLBROOK</div><div>RUN ALL JOBS</div><div>8:30AM-3PM</div></div><div>Week View</div></div>		
Total	-	-	-	\$717	\$139	\$393	-	-	\$1287	\$866	\$259	\$1459	\$299	\$259	-
7:00 AM	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote
7:30 AM	Book Quote	Book Quote	Book Quote	\$349 - C GREEN POINT-South 2	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	\$299 - U TANILBA BAY-7	\$259 - C SCONE-3	Book Quote
8:00 AM	Book Quote	Book Quote	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Unavailable	Unavailable	Book Quote
8:30 AM	Book Quote	Book Quote	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Unavailable	Unavailable	Book Quote
9:00 AM	Book Quote	Book Quote	Book Quote	Unavailable	Book Quote	\$224 - C WEST WALLSEND-4A	Book Quote	Book Quote	\$299 - C MACQUARIE HILLS-4	\$866 - MCAF OAKHAMPTON-2C	\$259 - C CESSNOCK-3	Book Quote	Unavailable	Book Quote	Book Quote
9:30 AM	Book Quote	Book Quote	Book Quote	\$363 - UACCSI WAMBERAL-South 1	Book Quote	Unavailable	Book Quote	Book Quote	Unavailable	Unavailable	Unavailable	Book Quote	Book Quote	Book Quote	Book Quote
10:00 AM	Book Quote	Book Quote	Book Quote	Unavailable	\$50 - TgO BALMORAL-1	Unavailable	Book Quote	Book Quote	Unavailable	Unavailable	Unavailable	\$1459 - ACCSIMCM/IN HAMILTON SOUTH-3B	Book Quote	Book Quote	Book Quote
10:30 AM	Book Quote	Book Quote	Book Quote	Unavailable	Unavailable	\$169 - C JESMOND-4B	Book Quote	Book Quote	\$448 - C EDGEWORTH-4	Unavailable	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote
11:00 AM	Book Quote	Book Quote	Book Quote	Book Quote	Book Quote	Unavailable	Book Quote	Book Quote	Unavailable	Unavailable	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote
11:30 AM	Book Quote	Book Quote	Book Quote	Book Quote	\$89 - U CHARLESTOWN-2	Book Quote	Book Quote	Book Quote	Unavailable	Unavailable	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote
12:00 PM	Book Quote	Book Quote	Book Quote	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote	Unavailable	Unavailable	Book Quote	Unavailable	Book Quote	Book Quote	Book Quote

• Once you click the spot, the system automatically saves the booking, but it won't trigger the email and SMS confirmation.

• Don't click the spot right away if the customer is still unsure of the date and time as the system automatically saves the booking. But if the customer changes her mind, you can simply transfer the booking to a different day.

- Ideally, the quote booking needs to be completed first in the technician's iPad to make sure the assessment fee and deposit taken by the technician get carried over to the actual job when Book Quote function is used.

Customer Details ■ No Booking **Job State** Booked Quote

Close Save Transfer Cancel Job Search Customer Account No: Invoice No: [Linked Quote Request](#)

Home Phone: 546235 Mobile: 546235 Work: 546235
 Title: Mr First Name: Test Last Name: Booked Quote Company:
 Street Address: 1 Booked Quote Test Rd Post Code: 2298 Suburb: WARATAH State: NSW
 Zone: 1 Email: ☐ No Email ☐ Exclude From Mailing List

Customer History:

Date	QuotedPrice	Actual	JobType	Comments	Job Notes
20/10/2022	***	-\$250.00	***	AF	*****
20/10/2022	***	\$50.00	***	TgQ	*****

☐ Job Address is different to billing address
 Contact Phone No: Title: First Name: Last Name:
 Street Address: Post Code: Suburb: State:

Job Details ☒ Informed customer of terms and conditions

TEST RUN
 Start Time: 9:30 AM End Time: 10:30 AM Date: 20/10/2022 Thursday Lead Source: Promotion:

Job Cleaning Type	Qty	Price	Payment Type	Amount	Date	TxnId	Quote Cleaning Type	Qty	Price
Assessment Fee	1	-\$50.00							
Deposit Paid To Technicians	1	-\$200.00							

Delete Type Add Type Delete Payment Add Payment Delete Type Add Type

Total Sch. & NonSch. \$: -250.00 Quoted Price \$: -250.00 Total Payments: \$.00 Account: \$.00

Customer Rating (1 - 5) 0

Call customer on:

☐ Proceed with Caution Client

Customer relevant comments: 2000 characters remaining Internal Job Notes: 2000 characters remaining Confirmation E-mail Notes: 2000 characters remaining Change Notes: 2000 characters remaining

Save Generate Invoice Extend Created By: Kylie Ilao CC On: 20/10/2022 At: 10:27 AM