

# NewWaySERVICE

## NewWaySERVICE User Guide

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# NewWaySERVICE User Guide

## About the application

Both simple and comprehensive, NewWaySERVICE is an application that allows you to track your service requests. Developed in 1996, NewWaySERVICE is used by thousands of users in over 80 countries. It is undeniably a choice solution for efficiently and intelligently tracking your different requests.

NewWaySERVICE is a SaaS/cloud-based web application. Its 100% responsive user interface adapts no matter the size and orientation of the screen. You can access the application using a desktop computer, a tablet, or a smartphone which makes NewWaySERVICE the ideal solution for both workshop and field technicians. NewWaySERVICE is available 24/7. No installation is required; all you need is an internet connection to use NewWaySERVICE. In short, NewWaySERVICE allows you to manage your work orders paperless.

NewWaySERVICE allows you to track every work order (service request) from start to finish, and to keep a record of the amount of time each of your technicians has spent on it. The hours worked can be automatically calculated using a timer that can be started and stopped with the simple click of a button. The hours worked may also be different from the amount of time you want to bill your customer, which can be very practical for invoicing.

In addition to entering the amount of time worked and a description of the work performed, technicians can enter the parts that they had to use or replace on each work order. In such cases, the parts inventory in NewWaySERVICE is automatically updated. Additional information can also be entered for each work order. Files may be attached to it, for example, photos that your technician took on site, and they can be directly included in the work order using his or her smartphone.

Since NewWaySERVICE is so flexible, you can adjust the application's settings according to your needs. For example, you can add additional fields (called "user defined fields") to manage specific information about your company. Security is also flexible and can be adjusted according to your needs. For example, you can limit access to work orders so that a technician only sees the work orders to which he or she has been assigned. This function is very useful when, for example, you would like to give subcontractors access to NewWaySERVICE who are not your direct employees. You are therefore able to limit the information that they can see.

In short, with NewWaySERVICE, you can take advantage of many other functions not mentioned here. You will be pleasantly surprised by how easy they are to use.

On that note, we would like to thank you for using NewWaySERVICE. Enjoy!

The team at NewWaySERVICE

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## Starting off on the right foot

### **NewWaySERVICE: Easy as 1, 2, 3**

A work order is, in effect, a service request, but it can also refer to any other type of request. Normally, when you create a work order, you must enter specific mandatory information, beginning with the customer who requires the service. It is then possible to enter one or more types of equipment, but this information is optional. First, specifying the type of equipment in the work order provides more information to the technician about the nature of the work to be completed. In addition, it allows you to more efficiently manage your work orders. For example, it is possible to categorize or even filter work orders according to the type of equipment, on screen or in reports.

You can then enter a description of the request, specify its priority level and its status. You can also enter information in user defined fields specific to your company that you have previously configured. See the section on **User defined fields** later in the documentation for more information.

Lastly, you must specify the technician responsible for the work order. You will then be able to schedule appointments with your customer for one or more technicians. Appointments are also optional. You can therefore add appointments to a work order at a later point and only if necessary.

As a result, before you can fully track your work orders, it is best to begin by entering certain basic information into the application, such as a list of your technicians or a list of your diverse types of equipment. It will be much easier to manage your work orders after doing so.

**Tip:** Entering your customers beforehand is not mandatory. When adding a work order, if the customer entered does not exist, the application will automatically create the customer for you (if you have the necessary access rights). Later, if necessary, you can access the customer's file and enter the missing information. The same principle applies for other information, such as equipment and equipment types.

Since it is best to enter additional information into the application beforehand that is necessary for optimal functioning (for example, the list of your work order statuses or priority levels), we invite you to continue reading the user guide.

### **Where do I start?**

We suggest simply continuing to read the chapters in this document in the order presented. The order was intentionally chosen to allow you to learn how to use the application from beginning to end. If you are already familiar with the application, you can easily go directly to a specific chapter for more information on a given topic. In the next chapter, we invite you to continue configuring the application.

## Configuring the application

### **Information about your company**

To get started, take a few moments to enter some specific information about your company. To go to this section, click on the **More** tab and then select the menu **Configuration | Information about your company**.

The information that you enter on this screen will be displayed on your work orders when they are printed or they will be displayed in the customer portal.

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We recommend taking the time to enter your company's information. In effect, this information is also used for other functions in NewWaySERVICE. Don't forget to add your company logo, if you have one. It will be displayed on your work orders and in the customer portal.

Click on the **Save** button to save the changes you have made.

## **Application configuration**

This section allows you to personalize certain application settings. To go to this section, click on the **More** tab and then select the menu **Configuration | Application configuration**.

This option is divided into several sections:

### **Description and color of work order statuses**

A work order may have 20 different statuses. You can personalize each description, as well as the color of each of these statuses. The color used to display the work order in the list of work orders on the screen will depend on its status. This makes it very visual and helps you to easier identify your work orders on the screen.

A work order may have 10 different priority levels. As with the statuses above, you can personalize the description of each of these priorities.

### **Other descriptions and colors**

In a work order, the cost of parts and the cost of labor are calculated separately. One box allows you to add an additional amount for parts and the other is for labor. This is practical, for example, if you need to adjust the overall amount of a work order. You can therefore personalize the description of these two boxes.

A quote may have 10 different statuses. You can personalize each description, as well as the color of each of these statuses. The color used to display the quote in the list of quotes on the screen will depend on its status. This makes it very visual and helps you to easier identify your quotes on the screen.

A purchase order can have 4 different statuses: Pending, In process, Closed and Canceled. You can personalize the color for each of these statuses. The color used to display the purchase order in the list on-screen will then depend on its status. This is very visual and allows you to easily identify your purchase orders in the list.

### **Default values and behaviors**

#### **When adding a work order**

In the application, you can specify the number that you would like to assign to the next work order that will be created. This is practical when you switch from one application (or a manual system) to NewWaySERVICE and you would like to continue the work order number sequence where you left off.

In this section, you can also specify the information that will be automatically entered by default when adding new work orders.

Finally, you can indicate the behaviour that the application should have when you add equipment on a work order that is assigned to a different customer. By default, the application automatically replaces the customer on the work order with the customer assigned to the equipment that you are adding on the work order. This is because once sold, equipment does not usually change owners.

You can change this behaviour and indicate the application not to replace the customer currently selected on the work order and instead allow you to assign equipment to the customer on the work order. This is especially useful when you are renting equipment and this equipment can change customers often. This

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saves you having to manually change the customer in the equipment file each time.

Tip: Even if you enable this option, the equipment is not systematically reassigned to the customer of the work order. NewWaySERVICE always let you decide to reassign the equipment or not for each work order using a checkbox. This therefore allows you even more flexibility.

#### When adding work performed on a work order

Once a work order has been created, you or your technicians can enter what has been done on the work order, as well as the amount of time worked. This is what we refer to as "work performed." You can enter as much work performed as you wish on each of your work orders. In this section, you can also determine how the information will be automatically entered when adding work performed to a work order.

Tip: NewWaySERVICE allows you to separately enter the time worked by your technician and the amount of time you would like to bill to your customer. The application therefore allows you to specify if you would like to automatically copy the time worked that has been entered at a specific labor rate in the Labor section. Please see the section on **Labor rates** for more information.

### **Default values and behaviors (Continued)**

#### Option "Mark as completed"

A **Mark as completed** button exists in the work order that allows technicians to mark a work order as completed. When a technician clicks on this button, the application simply changes the status of the work order to a status that you have previously specified. This is where you can specify this status.

Clicking the **Mark as completed** button on a work order has exactly the same effect as changing the status of the work order by using the drop-down list. This option is useful when a technician does not have the right to change the status of a work order, which is normally the case. The **Mark as completed** button therefore allows a technician to change the status of a work order, but only to a status that you have pre-determined.

Finally, you can also indicate if you want to change the status of the work order when a technician starts a timer on it. Select the first entry (blank) to not change the status of the work order.

#### Other

In this section, you can indicate whether you want to display the total amount of the work order in the window when capturing the customer's signature.

#### Parts to be planned or to order

When a work order gets to a certain status, if you want the application to no longer take into account quantities to be planned that you entered in the section **Parts to be planned or to order** of a work order, uncheck these statuses from this section. This option is useful, for example, when the quantity of parts installed differs from the planned quantity. In such a case, the application would indicate that there are still parts to be planned for the work order even if it is finished.

#### When adding a quote

In the application, you can specify the number that you would like to assign to the next quote that will be created. This is practical when transitioning to another application (or from a manual system) to NewWaySERVICE and you would like to continue where you left off in the number sequence for your quotes.

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### When adding a purchase order

In the application, you can specify the number that you would like to assign to the next purchase order that will be created. This is practical when transitioning to another application (or from a manual system) to NewWaySERVICE and you would like to continue where you left off in the number sequence for your purchase orders.

### **Taxes**

In the section **Tax #1**, enter the name of the tax (ex: GST in Canada, VAT in France, etc.) and the tax number, if you would like it to appear on the work order (or quote) when printed.

In certain countries or regions, there are two taxes to be calculated on invoices, such as the QST in Quebec, which is calculated in addition to the GST. If this is the case, check the box **Activate tax #2** and then enter the information concerning the second tax.

Take care of selecting the way in which the second tax must be calculated for parts and also for labor by selecting the appropriate option in fields **Formula for tax #2 (Parts)** and **Formula for tax #2 (Labor)**.

You will notice that NewWaySERVICE allows you to specify different tax parameters for parts and for labor. In effect, in certain countries or regions, it may happen that the tax rate differs depending on whether it is a good that has been sold (such as parts) or a service that has been provided (such as labor).

Tip: To manage tax rates, access menu **Configuration | Tax rates** available under the tab **More**.

Tip: Please note that it is possible to go back and manually adjust the tax rates that you have entered on any work order (or quote), at any time, simply by accessing the work order and clicking on the button **Edit billing summary**, in the **Billing summary** section.

Tip: Tax information entered here also applies to quotes.

### **Regional settings**

Begin by selecting your preferred language. This setting is used at some places in the software, such as to display the customer portal page in a default language.

Next, specify your time zone according to your geographic location. Specifying your time zone tells the application the date and time according to your location. This information is used, for example, to specify the date and time you have created a work order, or exactly when a work order changed statuses. It is therefore important to choose the correct time zone.

Now select the date, time and number formats, as well as the currency that you wish to display on the screen, when sending emails or when printing reports or forms. These options do not change the way the application behaves, but will allow you to display information in your preferred format.

Tip: Note that NewWaySERVICE does not perform currency conversions. The currency you select here is solely used for aesthetic purposes when displaying amounts. When entering amounts, no currency information is stored in the database. Only numbers (without currencies) are recorded.

### **Reports and forms**

You can also select the desired paper format (Letter or A4) to print reports or work orders, or to print forms, such as work orders and purchase orders.

The field **Message to print at the bottom of work orders** allows you to enter the text that you want to automatically appear at the bottom of each work order when printing. This text is automatically displayed on all work order templates already included with NewWaySERVICE.

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The text entered in the box **Message to print at the bottom of invoices** will be displayed only when you select the **Invoice** model form, when printing your work order. Note that NewWaySERVICE does not come with an invoicing module. Nevertheless, since all of the information you need in order to print an invoice is normally entered into the work order, you can print an invoice simply by printing your work order and selecting the **Invoice** form.

You can also specify the term that you would like to be displayed when printing the invoice. You have the choice of **Invoice**, **Tax Invoice**, and **Proforma Invoice**.

The field **Message to print at the bottom of quotes** allows you to enter the text that you want to automatically appear at the bottom of each quote when printing. This text is automatically displayed on all quote templates already included with NewWaySERVICE.

The **Message to print at the bottom of purchase orders** box allows you to enter text that you would like to automatically appear at the bottom of each purchase order when printed.

### **Calendar of appointments**

Begin by specifying the first day of the week. The day that is specified here determines the first day that will be displayed in the **Calendar of appointments** tab.

Tip: When you click on a date field, a calendar displays. The first day of the calendar week also corresponds to the day of the week specified here.

### **Appointment reminder**

In this section, you can indicate whether you want NewWaySERVICE to automatically send appointments by email to technicians. You can also specify the number of days in advance these appointments should be sent. Appointments are normally sent the night before around 1 a.m. The email received by the technician contains the main information of the work order as well as an iCalendar file in attachment. Most email client software can read and understand this file format and display it directly in the email. With a simple click, the technician could add the appointment to his personal agenda on his or her smartphone, tablet or computer.

### **Maintenance schedule**

When you create a maintenance schedule (recurring work orders) for a piece of equipment, you can specify here how many days in advance you would like the work order to be created.

Example: For a piece of equipment, let's say you specify that the work order must be created every three months to carry out maintenance. If the application determines that the next maintenance appointment for this piece of equipment is due on January 15 and you have instructed the application to create work orders five days in advance, then on January 10, the application will create the work order that is planned for January 15.

### **Authentication**

NewWaySERVICE also allows your users to log in using their Google or Microsoft ID. It is from this section that you can enable this feature.

Tip: This feature is sometimes called Single sign-on (SSO).

### **API (Application Programming Interface)**

This is where you can activate the API in NewWaySERVICE. The API (Application Programming Interface) for NewWaySERVICE allows you to exchange information between NewWaySERVICE and other software

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using any programming language.

Consult the API documentation for more information. The API documentation is available from the **Help and support** option, via the **More** tab.

## Technicians

As previously mentioned, before being able to enter and manage your work orders, you must enter specific information. Let's start with the technicians.

To manage your technicians, click on the **More** tab, and then select the **Technicians** option. From this option, you will obtain the list of technicians.

Simply click on the **Add new technician** button to add a new technician or click on the technician's name in the list to access the technician's file. From the technician's file, you have access to all of the relevant information that you can consult or modify.

When adding a technician, you must enter a name, email address, and password, at a minimum. This information is mandatory. Note that the name and email address must be unique, meaning, no two technicians can have the same name and email address. When the new technicians access the application, they must enter the email address and password that you have entered.

**Tip:** Once logged in to the application, technicians can change their password in the **Change my password** option under the **More** tab. Technicians who have forgotten their password can also reset it by clicking on the **Lost password** link from the application login screen.

All of the other information in the **Main information** section is optional. Nevertheless, we encourage you to enter the technician's complete address. This information will allow you to see where the technician lives and therefore his or her "home base." This information can also be useful if the technician is a subcontractor, for example. You can view this information in the **Map** tab, which will display a Google Map®. Visit the **Map** section for more information on this topic.

### Additional information

In this section, you can specify the technician's category. The technician's category is not used in the application. However, it allows you to filter your technicians on screen when viewing the list of technicians, or it allows you to filter information for certain reports.

**Tip:** Use the **Plus**, **Pencil**, and **Trash can** buttons located to the right of the **Category** dropdown list to manage this information.

Then specify the warehouse where the technician is assigned by default. This information is used when the technician enters a part on the work order when entering work performed. By default, the application will propose deducting the parts from this warehouse, but the technician can select another warehouse if necessary.

**Tip:** If your technician keeps an inventory of parts in his or her truck, you can create a warehouse that is the technician's truck, for example.

**Tip:** Use the **Plus**, **Pencil**, and **Trash can** buttons located to the right of the **Warehouse** dropdown list to manage this information.

Lastly, you can enter a priority level (seniority) for each of your technicians. This allows you to, for example,

determine the display order of the technicians in the calendar of appointments or the selection order when the application proposes appointment options for a work order.

## Security

A technician is active by default. Active technicians may access the application using their email addresses and passwords. If you wish to suspend a technician's access to the application, simply select the **Inactive** option in the **Status** field.

Tip: When a technician leaves your organization, simply set the technician's status to Inactive. The technician will no longer be able to access the application. In addition, you can keep a complete history (work performed, etc.) for the technician. Since inactive technicians are not taken into consideration for subscriptions, you can add a new technician to replace the inactive technician without changing the number of technicians in your subscription.

## Role

In NewWaySERVICE, there are three types of technicians (or user types). These types are called "roles." A user can have the role of **Technician**, **Dispatcher**, or **Administrative staff**. A technician can also have two roles at once, meaning, either **Technician** and **Dispatcher** or **Technician** and **Administrative staff**.

Tip: In the documentation, we use the term "user" instead of technician, but it is the same thing.

The main difference is that you can assign work orders to users that have the role of **Technician**. However, you cannot assign work orders to **Dispatchers** or **Administrative staff**, unless the user also has the role of **Technician**.

For example, do not give the role of **Technician** to users who must only access the application to manage work orders or print reports, and who do not need to be assigned to appointments or work orders.

Since you do not have to purchase a subscription for users who do not have the role of **Technician**, this allows you to save money on your subscription. You must only purchase a subscription for users to whom you assign the role of **Technician**. Please note, however, that you cannot have more users with the role of **Dispatcher** or **Administrative staff** than users with the role **Technician**.

Tip: Note that, at any time, you can change a user's role, if necessary, by simply accessing their file.

The role of **Dispatcher** is the role that gives access to all of the options in the application. This is the only role that allows the user to access the **Technicians** section to manage technicians. Normally, only some users in your organization should have this role.

Finally, the role of **Administrative staff** is the role that you must use to grant access to certain options in the application to a user who is not a technician.

Tip: The role Administrative staff allows some additional privileges to the user in the application. Among other things, this role allows the user to see appointments and timers for all technicians via the **Dashboard** tab and via the **Limited View** while the **Technician** role limits appointments or timers displayed in these options. This role also allows the user to access the **Map** tab.

## Additional rights

This section allows you to specify the user's access rights in the application.

Tip: This section disappears when the user has the role of **Dispatcher** because this role automatically grants access to all of the options in the application.

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Tip: If you would like to give access to a subcontractor who is not a direct employee of your company and you would like to filter the data that the subcontractor can view and access, simply check the role **This user is a technician**, then be sure that the box **This user is a dispatcher or an administrative staff member** is unchecked.

Then check the boxes **Limit the technician to see only his work orders**, **Limit the technician to see only his quotes** and **Limit the technician to see only his customers**, in the **Work orders**, **Quotes** and **Customers & Equipment** sections.

Tip: To do a quick test of the technician's access rights, from the list of technicians, click on the small icon to the right of the technician's name. You will then be logged in as if you were the technician and you will see the exact options that he or she can access and the data that the technician can see. To go back to your own account, click on **Log out and log back in as...**, from the tab **More**.

You must have the role of **Dispatcher** to be able to log in as another technician. Note that you cannot log in as another technician who also has the role of **Dispatcher** or who is inactive.

Finally, even if you log in as another technician to test its access rights, you will never be able to see their conversations via the **Chat** option. Each user's chat conversations remain private at all times and can only be accessed by the user itself.

## User defined fields

As in most of the application's other modules, it is possible to add additional fields in the technician's file that allow you to store information that is specific to your company. Please see the section **User defined fields** later in the documentation for more information on how to add additional fields.

## Work schedule

When you create a work order, you can enter appointments. You can enter as many appointments as you wish on each of your work orders. Every appointment has a date and time, a duration, and a technician.

In order for NewWaySERVICE to propose appointments only during your technicians' working hours, we recommend creating one or more work schedules and then assigning your technicians to those schedules.

A work schedule is the working hours for a given period (1, 2, 3, or 4-week periods), such as 8 am to noon and 1pm to 5pm, from Monday to Friday. Once you've created your work schedules, you can assign your technicians to them.

Tip: There is already a work schedule named **Default schedule** in NewWaySERVICE and, when you add a new technician, NewWaySERVICE automatically assigns the technician to this work schedule. You can modify this schedule and adjust the working hours according to your company.

From the section **Work schedules**, click on the button **New assignment** to assign the technician to a work schedule. When you assign a technician to a work schedule, you must select the schedule from the dropdown list and specify the date on which the schedule will come into effect for your technician. Using this date, it is possible to specify the changes to your technicians' work schedules in advance.

Tip: You can manage work schedules from the menu **Other options | Work schedules** located in the **More** tab.

## Assigned zones

You can assign your technicians to one or more zones. This allows you to, for example, quickly find out

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which technician you must send to a particular customer. Since each customer is also assigned to a zone, the application can know which technicians cover the customer's zone.

Simply click on **Add** to assign a zone to a technician. Repeat the procedure to assign a technician to additional zones.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Zone** dropdown list to manage this information.

## Documents

It is possible to attach documents to each of your technicians. Simply click on the button **Add a document** to attach a document, or click on the **Trash can** button to the left of the document in the list to delete it.

## Print

It is possible to print a technician's file. Go to the technician's file and then click on the **Print** button. Select the desired model form from the **Form** dropdown list, select the output format (normally a PDF) from the **Format** dropdown list, and then click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet browsers propose downloading the file before being able to view it.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a technician. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Technicians** module. Refer to the **Questionnaires** section later in the documentation for more information.

# Customers

The Customers module is used to manage your customers that you complete work orders for. To manage your customers, select the **Customers** tab. From this section, you will obtain the list of customers. Simply click on the **Add a new customer** button to add a new customer or click on the name of a customer in the list to access its file.

When adding a customer, you must enter the customer's name. The customer name must be unique; there cannot be two customers with the same name. You can also enter a code for the customer (in the **Main information** section). This field is optional but, if you enter a code, the code must also be unique; there cannot be two customers with the same customer code.

You can then enter the customer's address, as well as information about the customer's primary contact person. Check the box **This contact can receive email notifications** if you would like the customer's contact to receive notifications by email. You could program notifications, for example, a notification about a change in status for a work order, or a notification concerning the expiration of a warranty for a piece of equipment. Please see the section on **Email notifications** later in the documentation for more information.

Tip: Once the customer has been created, you can add additional contacts in the **Additional contacts** section.

## Main information

The **Category** field allows you to specify the customer category. Categorizing customers is not mandatory. The customer categories are simply another way to group customers. For example, from the list of

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customers, you can filter customers based on one or several categories so that only those categories appear on the screen. When printing a report that displays the customer list, you can also specify that the report should only print customers belonging to certain customer categories.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Category** dropdown list to manage this information.

The **Zone** field allows you to specify the zone where your customer is located. As seen previously in the **Technicians** section, zones can help you to select the technician(s) to send to the customer.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Zone** dropdown list to manage this information.

Then specify the preferred technician if it is important to always send the same technician to the customer. If not, select **None** in the dropdown list. This information is considered when the application proposes a technician for an appointment in a work order.

If you have customers who prefer to communicate in English and others in French, you can specify in which language you would like the work order (or quote) to be printed. If you do not specify it, the form will be printed in the language you chose when logging in to the application. Note that you can change the language at any time during your session by simply selecting **Switch language** in the **More** tab.

If you activate the customer portal and you limit access to the portal only to customers who have a customer code and a valid password, then enter the customer's password into the field **Portal password**. Customers will be able to access the customer portal using their customer code and password. See the section on the **Customer portal** later in the documentation for more information.

Then enter the customer's payment term and specify the tax rates to use.

Tip: NewWaySERVICE allows you to specify different tax parameters for parts and for labor.

Tip: To manage tax rates, access menu **Configuration | Tax rates** available under the tab **More**.

If you enter text in the **Special instructions** field, when adding a new work order and you select a customer, the text that you have entered in this field is automatically copied in the **Special instructions** field in the work order.

Use the **Internal notes** field to enter information about your customer. This field is not printed on work orders.

To deactivate a customer, select **Inactive** in the **Status** section. If you have activated the customer portal, this customer will no longer be able to access it. No data will be erased (for example, work orders), even if you set a customer's status to inactive.

The other fields are optional and available for information purposes only. These options do not change the way the application behaves.

## User defined fields

As in most of the application's other modules, it is possible to add additional fields in the customer's file that allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

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## Additional contacts

You can add as many contacts as you wish for each customer. Click on **Add new contact** in this section to add a new contact for the customer.

## Customer equipment

Equipment is a good that you have either sold or rented to a customer, or simply a good that you must conduct maintenance on. A piece of equipment must have a unique number (serial number) and it must be linked to an equipment type, as well as a customer.

Example: Your company repairs and conducts maintenance on printers and you must conduct maintenance on an HP LaserJet 5000 whose serial number is HP123456, for your customer, ABC Inc. If you would like to create this piece of equipment in the application, the equipment number could be the printer serial number (**HP123456**), the customer would be **ABC Inc.**, and the type of equipment could be **HP LaserJet 5000**.

Tip: You do not have to create equipment to add it to a work order. However, it is a good idea to create equipment if, for example, you would like to know which customer has which equipment, to manage warranties or service contracts, or simply to plan preventive maintenance on the equipment. Once the equipment has been created, you can, for example, automate the creation of work orders for the equipment.

The **Customer equipment** section allows you to add and manage a particular customer's equipment, while the **Equipment** tab allows you to manage all equipment, regardless of the customer.

Even though it is sometimes easier to manage equipment in the customer's file instead of in the complete list of equipment, it does not matter if you add or modify equipment in the customer's file or under the **Equipment** tab. For that reason, you can simply refer to the section on **Equipment** later in the documentation for more information about how to manage equipment.

## Labor rates

When adding work performed to a work order, you can specify the amount of billable time in the **Labor** section. You can manage the "standard" billing rates from the menu **Other options | Labor rates** in the **More** tab. However, if certain customers have labor rates that are different from the standard rates, you can specify the personalized rates in the **Labor rates** section in the customer file.

When entering labor details for work performed on a work order, if the application detects that you have specified personalized rates for the customer, these rates will be copied in the **Labor** section, instead of the standard rates.

Tip: Since, in a work order, the customer that is "Billed to" may be different from the customer for whom the work was performed, you can specify if the personalized rates to be used must come from the "Billed to" customer or the customer that you have completed the work for.

You can tell the application what to do in such cases in the section **Default values when adding a work order** in the **Application configuration** section under the **More** tab.

## Banks of hours

If necessary, in this section, you can add banks of hours that you sell to your customers. When adding a bank of hours, you can specify if it has an expiration date.

A bank of hours is used when adding work performed to a work order. In the **Labor** section for a work performed entry, if the application detects that the customer has at least one active bank of hours, the application will propose taking time from this bank of hours instead of billing the time to the customer. In such a case, the billing rate will become 0 and the time will be subtracted from the customer's bank of hours

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that you have specified.

When entering billable time in the **Labor** section for work performed, the application will also tell you the amount of time remaining in each of the customer's banks of hours and will warn you if there is not enough time in a bank.

Lastly, the application will not propose a bank of hours with an expiration date that has already passed, even if there is unused time in the bank. The same applies if you have set a bank of hours to the inactive status.

## Branches

NewWaySERVICE allows you to manage your customer's branches. This allows you to, for example, complete work for a customer while always specifying to bill the parent company.

A customer cannot simultaneously have branches and be a branch for another customer. In effect, branches are limited to a single level in the application.

To specify that a customer is a branch of another customer, edit the customer file then from the box **Branch of**, enter or select the name of the customer that will be the customer's parent company. You can also do that at the time you add the customer.

If you would like to make a branch independent again (so that it is no longer a branch of another customer), simply modify the customer's file then remove the customer name from box **Branch of**.

## Documents

It is possible to attach documents to each of your customer files. To do so, simply click on the **Add a document** button. To delete it, click on the **Trash can** button located to the left of the document in the list.

## Print

To print a customer's file or specific information about the customer, such as a list of its banks of hours, the equipment list or simply its work order history, go to the customer's file and click on the **Print** button. Select the desired model form from the **Form** dropdown list. Then select the output format (normally a PDF) from the dropdown **Format** list and click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet browsers propose downloading the file before being able to view it.

## New work order

It is possible to add a work order for a customer directly from its file. From the customer file, simply click on the **New work order** button. The new work order window will be displayed and the customer will already be selected in the section **Work to perform for**. All that you must do is enter additional information about the work order, if necessary.

Tip: A quick way to view a customer's list of work orders is to go to the customer's file and click on the **More...** link at the bottom of the section **Latest work orders**. The **More...** link will not be visible if the customer has no work orders.

## New quote

It is possible to add a quote for a customer directly from its file. From the customer file, simply click on the **New quote** button. The new quote window will be displayed and the customer will already be selected in the section **Work to perform for**. All that you must do is enter additional information about the quote, if necessary.

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Tip: A quick way to view a customer's list of quotes is to go to the customer's file and click on the **More...** link at the bottom of the section **Latest quotes**. The **More...** link will not be visible if the customer has no quotes.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a customer. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Customers** module. Refer to the **Questionnaires** section later in the documentation for more information.

## Equipment types

As seen previously in the **Customers** section, equipment must always be linked to a customer as well as an equipment type. You can manage your equipment types under the **Equipment types** tab. Simply click on the **Add a new equipment type** button or click on its description in the list to access its file.

When adding an equipment type, you must enter a description. The equipment type description must be unique; there cannot be two equipment types with the same description. You can also enter a code for the equipment type. This field is optional but, if you enter a code, the code must also be unique.

The **Category** field allows you to specify the equipment type category. Categorizing equipment types is not mandatory. It is simply a way to group equipment types. For example, from the list of equipment types, you can filter them based on one or several categories so that only those categories appear on the screen. In addition, when printing a report that displays the list of equipment types, you can specify, for example, that you would like to only print the equipment types belonging to certain categories.

Tip: Use the **Plus**, **Pencil**, and **Trash can** buttons located to the right of the **Category** dropdown list to manage this information.

If you enter text in the **Special instructions** field when adding a new work order and you select an equipment type, the text that you have entered in this field is automatically copied in the **Special instructions** field in the work order.

Use the **Internal notes** field to enter information about the equipment type. This field is not printed on work orders.

To deactivate an equipment type, select **Inactive** in the **Status** section. No data will be erased (for example, work orders), even if you set an equipment type's status to inactive.

## Parts linked to this equipment type

In this section you can indicate which parts are usually used on this equipment type. So, when entering parts on a work performed in a work order, the application will allow you to choose only among parts linked to the equipment type of the work order. This greatly facilitates the selection of parts in such a case.

Tip: There is also a section entitled **Equipment types linked to this part** in the part's file. The principle is the same, except in this case, you must specify a list of equipment types instead of a list of parts.

## User defined fields

As in most of the application's other modules, it is possible to add additional fields in the equipment type's

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file that allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

## Documents

It is possible to attach documents to each of your equipment type files. Simply click on the button **Add a document** to attach a document, or click on the **Trash can** button to the left of the document in the list to delete it.

## Print

To print an equipment type's file, click on the **Print** button in the file. Select the desired model form from the **Form** dropdown list. Then select the output format (normally a PDF) from the **Format** dropdown list and click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet browsers propose downloading the file before being able to view it.

## New work order

It is possible to add a work order directly from the equipment type's file. From the equipment type's file, simply click on the **New work order** button. The new work order window will be displayed and the equipment type will already be selected in the section **Equipment**. All that you must do is enter additional information about the work order.

Tip: A quick way to view an equipment type's list of work orders is to go to the equipment type's file and click on the **More...** link at the bottom of the section **Latest work orders**. The **More...** link will not be visible if there is no work orders for this equipment type.

## New quote

It is possible to add a quote directly from the equipment type's file. From the equipment type's file, simply click on the **New quote** button. The new quote window will be displayed and the equipment type will already be selected in the section **Equipment**. All that you must do is enter additional information about the quote.

Tip: A quick way to view an equipment type's list of quotes is to go to the equipment type's file and click on the **More...** link at the bottom of the section **Latest quotes**. The **More...** link will not be visible if there is no quote for this equipment type.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to an equipment type. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Equipment types** module. Refer to the **Questionnaires** section later in the documentation for more information.

# Equipment

As seen in the **Customers** section earlier, you can manage the list of all of your customer's equipment in NewWaySERVICE. Remember that equipment is a good that you have either sold or rented to a customer, or simply a good that you must conduct maintenance on. A piece of equipment must have a unique number (serial number) and it must be linked to an equipment type, as well as a customer.

To manage your equipment, select the **Equipment** tab. From this section, you will obtain the list of

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equipment. Simply click on the **Add new equipment** button to add new equipment or click on the equipment's serial number in the list to access its file.

Tip: You can manage equipment that is specific to a customer directly in the **Customer equipment** section in the customer's file.

When adding equipment, you must select the customer that it is linked to. Position your cursor in the **Customer** box, then start entering your customer's name or code. As you enter letters, if the application finds one or more customers that correspond to what you have typed, they will be proposed to you in a list that will appear under the **Customer** box. Select the desired customer from the list by clicking on it. If it is a new customer, simply type its name in the **Customer** box and it will automatically be created when you click on **Save** to save your new equipment.

You must also select the equipment type that will be linked to this equipment. Position your cursor in the **Equipment type** box, then start entering the equipment type's description or code. As you enter letters, if the application finds one or more equipment types that correspond to what you have typed, they will be proposed to you in a list that will appear under the **Equipment type** box. Select the desired equipment type from the list by clicking on it. If it is a new equipment type, simply type its description in the **Equipment type** box and it will automatically be created when you click on **Save** to save your new equipment.

Then enter the serial number in the **Serial number** box. This number must be unique; no other equipment may have the same serial number.

Tip: If necessary, you can change the serial number for the equipment by going to the equipment's file. In such cases, the serial number will be automatically and immediately changed everywhere in the application, such as for example on work orders linked to the equipment.

If you enter text in the **Special instructions** field when adding a new work order and you select this equipment, the text that you have entered in this field is automatically copied in the **Special instructions** field in the work order.

Use the **Internal notes** field to enter information about your equipment. This field is not printed on work orders.

To deactivate a piece of equipment, select **Inactive** in the **Status** section. No data will be erased (for example, work orders), even if you set a piece of equipment's status to inactive.

## Warranty information

Check the box **Has warranty** to be able to enter information about the warranty. You can enter the purchase date for the equipment, or the date the customer acquired the equipment, as well as the duration of the warranty in months. The application will automatically display if the equipment is still under warranty.

Tip: When you select equipment for a work order, the box **Under warranty** will be automatically checked if the equipment is still under warranty on the date that you create the work order.

Tip: Use the option **Email notifications related to equipment** to automatically send an email to your team, your customer, or another person when a warranty is about to expire. See the section on **Email notifications** later in the documentation for more information.

## Service contract information

Check the box **Has service contract** if, for example, you have sold a service contract for the equipment. You can enter the start date for the service contract, the contract's duration (in months), and the contract number or reference number. The application will automatically display if the equipment is still under service

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contract.

Tip: When you select equipment for a work order, the box **Under service contract** will be automatically checked if the equipment is still under service contract on the date that you create the work order. The contract number will also be copied in the box **Reference/Contract #** on the work order.

Tip: Use the option **Email notifications related to equipment** to automatically send an email to your team, your customer, or another person when a service contract is about to expire. See the section on **Email notifications** later in the documentation for more information.

## Meter information

A piece of equipment may have a meter. For example, in the case of photocopiers, the meter could be the number of copies made, while in the case of a motor, the meter may be number of hours of use. This information can be useful to plan preventive maintenance on this type of equipment.

For example, when a technician records the equipment's meter and enters it into a work order (in a work performed entry on the work order), the meter will be automatically updated in the equipment's file. Given this information, the application will be able to automatically create work orders when the value reaches a certain amount. Visit the **Maintenance schedules** section for more information on this topic.

Simply check **Has meter** and enter the current meter value for the piece of equipment in question.

## User defined fields

As in most of the application's other modules, it is possible to add additional fields in the equipment's file that allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

## Maintenance schedule

NewWaySERVICE allows you to create work orders for your equipment, either automatically (recurring work orders), on a regular basis on a fixed date (for example, every 6 months), or according to the equipment's meter value (for example, in increments of 2,000).

You can create multiple maintenance schedules for the same piece of equipment. Click on the button **Add a new maintenance schedule** to add your first maintenance schedule for your equipment.

Start by indicating if the application must create a work order on a fixed date or when the equipment's meter reaches a certain value. In the case of a fixed-date maintenance schedule, specify the date and time that the next work order (or, rather, the next appointment) must be created, as well as the interval between each work order to be created from thereafter.

Tip: In the **Application configuration** option, you can specify how many days in advance you would like the work orders to be created. Example: The application determines that the next maintenance appointment must be on January 15 and you have specified that the work order must be created 5 days in advance. As a result, on January 10, the application will create the work order that is planned for January 15.

In the case of a maintenance schedule created according to the equipment's meter, specify the threshold to be reached in order for the application to create a new work order, as well as the starting value.

Then, indicate whether you want the work order to be created with or without an appointment. If you specify to create an appointment, enter the expected duration of the appointment. Then select the technician from the drop-down list or select **According to availabilities** and the application will automatically assign the appointment to the next available technician.

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Tip: By default, even if the application determines that an appointment must be created on a specific date, if no room is available in the schedule or no technicians are available on that date, the application will move the appointment forward until it finds room. You can however change this behaviour by checking the box **Force creation of the appointment at the date and time expected even if there is no room available in the Calendar of appointments**.

Finally, enter a description of the work to be performed as well as other work order information and click on **Save** to save the new maintenance schedule.

Tip: Set the status to **Inactive** if you would like to temporarily stop creating work orders for a maintenance schedule.

## Documents

It is possible to attach documents to each of your equipment files. Simply click on the button **Add a document** to attach a document, or click on the **Trash can** button to the left of the document in the list to delete it.

## Print

To print an equipment file or specific information about equipment, such as the work order history for the equipment, go to its file and click on **Print**. Select the desired model form from the **Form** dropdown list, select the output format (normally a PDF) from the **Format** dropdown list, and then click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet browsers propose downloading the file before being able to view it.

## New work order

It is possible to add a work order directly from the equipment's file. In the file, simply click on the **New work order** button. The New work order window will be displayed and the customer will be already selected in the section **Work to perform for**. The equipment will also already be selected in the section **Equipment**. All that you must do is enter additional information about the work order, if necessary.

Tip: A quick way to see the list of work orders for a piece of equipment is to go to the equipment's file and click on the **More...** link at the bottom of the section **Latest work orders**. The **More...** link will not be visible if there are no work orders for the equipment.

## New quote

It is possible to add a quote directly from the equipment's file. In the file, simply click on the **New quote** button. The New quote window will be displayed and the customer will be already selected in the section **Work to perform for**. The equipment will also already be selected in the section **Equipment**. All that you must do is enter additional information about the quote, if necessary.

Tip: A quick way to see the list of quotes for a piece of equipment is to go to the equipment's file and click on the **More...** link at the bottom of the section **Latest quotes**. The **More...** link will not be visible if there are no quotes for the equipment.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to an equipment. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Equipment** module. Refer to the **Questionnaires** section later in the documentation for more information.

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## Parts

When entering work performed on a work order, you can also enter the parts that you used to conduct maintenance or repairs. The application will automatically manage the inventory for your parts. In effect, every time a technician adds a part to a work performed entry, it is automatically subtracted from the inventory.

Tip: Since NewWaySERVICE allows for multiple warehouses (a warehouse can simply be a technician's truck), you can assign a default warehouse to each of your technicians. In such cases, the application will suggest, by default, subtracting the parts from the technician's warehouse.

Tip: A quick way to see the list of work orders where a part was used is to go to the part's file and click on the **More...** link at the bottom of the section **Latest work orders**. The **More...** link will not be visible if there are no quotes for that part.

Tip: A quick way to see the list of quotes where a part was used is to go to the part's file and click on the **More...** link at the bottom of the section **Latest quotes**. The **More...** link will not be visible if there are no quotes for that part.

To manage your parts, select the **Parts** tab. From this section, you will obtain the list of parts. Simply click on the **Add a new part** button or click on the part's description in the list to access its file.

When adding a new part, you must enter a description. The description of the part must be unique; there cannot be two parts with the same description. You can also enter a code for the part. This field is optional but, if you enter a code, the code must also be unique; there cannot be two parts with the same code.

Enter a price for the part. This price will be automatically entered when the part is selected in the work performed section. Also enter the quantity that you have in stock at the time the part is created.

The **Category** field allows you to specify the parts category. Categorizing parts is not mandatory. The parts categories are simply another way to group parts. For example, from the list of parts, you can filter them based on one or several categories so that only those categories appear on the screen. As another example, when printing a report that displays the list of parts, you can specify that you would only like to print the parts belonging to certain parts categories.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Category** dropdown list to manage this information.

The field **Default supplier** is for information purposes only.

When you manually adjust the quantity for a part, if you select the adjustment type **Manual Purchase/Reception/RMA**, you can specify the supplier from the dropdown list that will appear. The default supplier that you previously indicated for the part will automatically be selected.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Supplier** dropdown list to manage this information. You can also manage suppliers from the **Suppliers** option, via the **More** tab.

Use the **Internal notes** field to enter information about the part.

To deactivate a part, select **Inactive** in the **Status** section. No data will be erased (for example, work orders), even if you set a part's status to inactive.

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## User defined fields

As in most of the application's other modules, it is possible to add additional fields in the part's file that allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

## Quantity in stock

In this section, you can indicate the number of parts that you have in stock at each warehouse. At any time, you can adjust the inventory or transfer parts from one warehouse to another. To adjust the quantity in a warehouse, simply click on the quantity (link in green) and specify the type of adjustment as well as the quantity to adjust. You can even specify the reference number, if necessary, such as a receiving number in the case of the receiving of parts.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Warehouse** dropdown list to manage this information.

Note that a complete record of each transaction that affects the inventory will be stored in the application. This is useful when you need to retrace transactions or complete audits.

## Supplier part codes

If the supplier part code you have entered in NewWaySERVICE is different from the code used by the supplier who you normally order the part from, in this section you can specify the part code for each of your suppliers. You can also use this option to enter the cost of the part for this supplier and enter a description of the part, which is unique to each supplier.

Then, when you select the part in the purchase order, the supplier (supplier selected in the purchase order) part code will be printed and not your own part code. This also applies for the cost specified, as well as the description.

Tip: There is also a section entitled **Supplier part codes** in the supplier's file. The principle is the same, except in this case, you must specify a list of parts instead of a list of suppliers.

## Equipment types linked to this part

In this section you can indicate on which equipment types this part is usually used. So, when entering parts on a work performed in a work order, the application will allow you to choose only among parts linked to the equipment type of the work order. This greatly facilitates the selection of parts in such a case.

Tip: There is also a section entitled **Parts linked to this equipment type** in the equipment type's file. The principle is the same, except in this case, you must specify a list of parts instead of a list of equipment types.

## Documents

It is possible to attach documents to each of your parts files. Simply click on the button **Add a document** to attach a document, or click on the **Trash can** button to the left of the document in the list to delete it.

## Print

To print a part's file, click on **Print** in the part's file. Select the desired model form from the **Form** dropdown list, select the output format (normally a PDF) from the **Format** dropdown list, and then click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet

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browsers propose downloading the file before being able to view it.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a part. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Parts** module. Refer to the **Questionnaires** section later in the documentation for more information.

## Work orders

Once the basic information has been entered into the application, you and your technicians can now create and/or manage work orders. Simply go to the **Work orders** tab.

From this section, you will obtain the list of work orders. Click on the **Add a new work order** button or click on the work order's number in the list to access its file.

When adding a work order, in the section **Work to perform for**, you must select the customer who the work order will be completed for. Position your cursor in the **Customer** box, then enter your customer's name or code. As you enter letters, if the application finds one or more customers that correspond to what you have typed, they will be proposed to you in a list that will appear under the **Customer** box. Select the desired customer from the list by clicking on it. The customer's information, including its address and primary contact person, will be automatically copied into the work order. If information has been entered into the **Special instructions** field in the customer's file, this information will also be copied into the **Special instructions** field in the work order.

If it is a new customer, simply type its name in the **Customer** box and it will automatically be created when you click on **Save** to save your new work order.

Tip: If you do not have the role of **Dispatcher**, you will be allowed to create a customer in a work order only if you have previously obtained the rights to do so.

All other fields in the work order are optional or have default values. Nevertheless, here is a description of each of these fields:

At the bottom of the section **Work to perform for**, you can check the box **Bill another customer** to display the **Bill to** section. Here you can enter a different customer if you wish to bill the work order to another customer.

Tip: If you have specified in the customer's file to automatically bill another customer, the box **Bill another customer** will be checked and the **Bill to** section will be automatically completed.

## Description of work to perform

In this box, enter a description of the service request or the work to be performed for the customer. You can enter as much text as necessary in this box.

Tip: Click on the small button (document icon) in the right corner of the section **Description of work to perform** to select or manage a list of predefined tasks. In effect, if you create work orders for recurring work, instead of always manually entering the same description, you can create a task and select it if necessary. The description of the task will be automatically copied into the section **Description of work to perform**.

Since each task has a duration, the duration for the task selected will also be copied in the **Duration** box in the **Appointment** section of the work order (only when adding a work order).

Lastly, you can select multiple tasks and the description will be added after the description of the work to be performed.

## Checklist

In addition to being able to enter a description of the work to perform and also being able to select predefined tasks, you can also add one or more checklists to your work order. Checklists allow you to quickly add a list of things to do to a work order. The technician can then simply check off each item on the list that has been completed. Each checklist can include an unlimited number of items.

Tip: Click on the small button (checklist icon) in the right corner of the section **Checklist** to select or manage checklists.

Since each checklist has a duration, the duration for the checklist selected will also be copied in the **Duration** box in the **Appointment** section of the work order (only when adding a work order).

Lastly, you can select multiple checklists on a same work order.

## Special instructions and internal notes

This field contains special instructions that were entered into the customer's file. If you have also specified equipment and/or an equipment type in the work order, this field will contain the special instructions that were entered in their files. You can enter additional information if necessary. This field is normally printed on the work order but is not, however, visible in the customer portal.

The **Internal notes** field allows you to enter notes that are not printed on work orders nor displayed in the customer portal.

## Status, priority, and technician responsible

Select the status and priority level for the work order, as well as the technician who will be responsible for the work order.

Tip: The description of the statuses and priorities can be changed in the option **Application configuration**. The status and priority selected by default when adding a new work order can also be changed in the **Application configuration** option.

You can optionally assign one or more labels to your work order. Labels are a way to categorize work orders or simply mark certain work orders. You can create as many labels as you wish. For example, from the list of work orders, you can filter work orders based on one or several labels so that only those work orders appear on the screen. To take another example, when printing a report that displays the list of work orders, you can select to print only the work orders that are marked with certain labels.

Lastly, the **Archived** box allows you to archive a work order. By default, archived work orders will not be displayed in the list of work orders. To display archived work orders, you must specify it by checking the filter box in the list of work orders.

## References

If necessary, enter the reference number received by the customer in this section (such as the purchase order number) or any other reference number that may be useful to your company.

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## Equipment

Optionally, you can specify an equipment type in the work order, but you can also directly specify the equipment (serial number).

As seen previously, since equipment must be linked to an equipment type and a customer, if you enter a serial number in a work order, the equipment type and the customer will automatically be entered in the work order. When adding equipment to a work order, entering the serial number directly into the **Serial number** box is a quick way to fill out a work order, without having to specify the customer beforehand.

To only specify an equipment type in the work order (without a serial number), position your cursor in the **Equipment type** box and start to enter the description or code for your equipment type. As you enter letters, if the application finds one or more equipment types that correspond to what you have typed, they will be proposed to you in a list that will appear under the **Equipment type** box. Select the desired equipment type from the list by clicking on it. If it is a new equipment type, simply type its description in the **Equipment type** box and it will automatically be created when you click on **Save** to save your new work order.

Tip: If you do not have the role of **Dispatcher**, you will be allowed to create an equipment type in a work order only if you have previously obtained the rights to do so.

If you would like to enter a serial number (which already exists in the application) but you don't know it, start by selecting the customer in the work order and then, in the **Equipment** section, click the button at the right of the **Serial number** box. From this list, you will be able to see all of the customer's equipment and select the equipment that you would like to add to the work order.

If you are allowed, you can enter a serial number that doesn't exist and the application will automatically create one for you in the database. This equipment will automatically be linked to the equipment type and the customer entered in the work order.

Tip: When you enter an existing serial number, the boxes **Under warranty**, **Under service contract** and **Reference/Contract#** will be automatically adjusted according to the information entered in the equipment's file and according to today's date.

To add additional equipment and/or equipment types to a work order, once the work order has been created, click on the button **Add additional equipment to this work order**.

## Appointments

When adding a work order, you can enter a first appointment in the **Appointment** section. If a preferred technician has been indicated in the customer's file, he or she will be selected by default in the list of technicians. If not, the option **According to availabilities** will be selected by default. Check the box **Do not add appointment for now** if you do not wish to add an appointment to the work order.

Tip: If you wish, it is possible to enter your own name as the technician by default in the **Technician** dropdown list. Go to the **Personal settings** option in the **More** tab to specify how the application should behave.

According to the technician selected and the duration indicated in the **Duration** field, the application will propose the next 10 appointments while taking each technician's work schedule into account.

If the appointment times proposed by the application in the **Availabilities** dropdown list does not work for you, you can simply click on the button **View/Edit from calendar of appointments** to directly access the appointments calendar. In the calendar of appointments, you will see a blinking box. This box represents the proposed appointment time that was initially selected in the **Availabilities** dropdown list in the work order. You can move or adjust the appointment (blinking box) where appropriate in the appointments calendar. Then click on the **Close** button to return to the work order. You will notice that the selection in the

**Availabilities** dropdown list will have been updated.

For more information about the calendar of appointments, visit the section **Calendar of appointments** later in the documentation.

Finally, you can also directly specify the date and time of the appointment by selecting the radio button **Specify a date and time manually**.

Tip: Even though, when adding a work order, you can only add a single appointment, once the work order has been created, you can then add as many appointments as you wish. To add other appointments to the work order or to modify existing ones, you can manage appointments in the **Appointments** section of the work order.

### User defined fields

As in most of the application's other modules, it is possible to add additional fields to the work order that allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

Tip: In addition to adding user defined fields to the work order, you can also add user defined fields to each piece of equipment entered in a work order, as well as for all work performed for a work order.

### Parts to be planned or to order

Like other sections of the work order, this section is optional, but can be very useful. Indeed, you can indicate here parts that would need to be planned or ordered to complete the work order. This section is particularly useful for indicating such parts that you don't usually keep in stock. Quantities entered here are automatically summed to the **Qty to be planned** column in the **Parts** tab. This facilitates the work of the person responsible for the purchases since he can easily see parts that have to be ordered.

Tip: If you want the application to no longer take into account the quantity to be planned when a work order gets to a certain status, just indicate it from the option **Application configuration**, section **Parts to be planned or to order**.

As you indicate that you have installed the parts on the work order (via the **Works performed** option), they will no longer appear in the **Qty to be planned** column of the **Parts** tab.

### Work performed

You or your technicians can add work performed to each work order. You can add as much information as you wish to each work order. To add work performed, from the work order's file, click on **Add new work performed**.

Tip: If you have added more than one equipment type and/or piece of equipment to a work order, you will see several **Work performed** sections (one for each piece of equipment). In this case, you can decide under which equipment you would like to add the work performed.

When adding work performed, you must select the technician that performed the work on the work order. By default, the application will select your name in the list, unless you do not have the role of **Technician**. In effect, only users with the role of **Technician** can be selected for work performed.

Then enter the date and time you began the work in the box **Beginning of work**, and enter the duration in the box **Time worked**.

Tip: If you have used the timer option to time the time you worked on the work order, the timed duration will

be automatically entered into the **Time worked** box. Please see the section **My timer** later in the documentation for more information.

Tip: There are two ways to enter the duration: either in hours:minutes or in decimal format. Consult sections **Entering negative numbers and durations** and **Entering durations** below for more information.

If you wish, you can then enter a description of the work you have performed in the section **Description of work performed**.

If needed, enter the distance traveled in km or miles in the box **Distance (km/mile)** to add a travel amount to this work performed. By default, the **Price per km/mile** box should contain the price per km/mile that you specified in the **Application Configuration** option. The travel amount is automatically added to the **Labor** section of the work performed.

### **Parts**

If necessary, you can add the parts that you used to perform the work. To add a part, click on the button **Add a part** and a window will open.

Position your cursor in the **Part** box, then enter your part's description or code. As you enter letters, if the application finds one or more parts that correspond to what you have typed, they will be proposed to you in a list that will appear under the box. Select the desired part from the list by clicking on it. If it is a new part, simply type its description in the **Part** box and it will automatically be created when you click on **Save**. Note that if you do not have the necessary rights to create parts, the application will not allow you to do this. In such cases, you must select a pre-existing part.

Tip: If the application detects that parts are linked to the equipment type of the work order on which you are entering a work performed, a check box will appear under the **Part** box. By checking that box, this makes it possible to choose among the parts linked to the equipment type in question. This greatly facilitates the selection of parts in such a case.

Once the part has been selected, the price of the part will be entered automatically. However, you can change the price if necessary. Then enter the quantity used. This quantity will be automatically deducted from the inventory. The application proposes deducting the quantity entered from the warehouse to which you are assigned by default, but you can specify if the quantity must be deducted from another warehouse by selecting a different warehouse in the **Warehouse** dropdown list.

Tip: Use the **Plus, Pencil, and Trash can** buttons located to the right of the **Warehouse** dropdown list to manage this information. You can also manage warehouses from the menu **Other options | Warehouses** option, via the **More** tab.

In addition, it is possible to enter a reference code for the part entered, such as a serial number, or any other information that may be useful.

Lastly, click on **Save** to close the Add a part window. You can add other parts to the work performed entry by clicking once again on the **Add a part** button. Don't forget to click on **Save** for the work performed so that all of the information that you have entered (including parts) will be saved. If you do not click on **Save** for the work performed, the parts entered will not be saved to the work order.

### **Labor**

Contrary to the **Time worked** box where you must normally record the time actually worked, the **Labor** section allows you to specify the billable time (the amount of time you would like to bill the customer). This time may be different from the duration entered in the **Time worked** box.

By default, the application copies the duration that you've entered in the **Time worked** box at your previously determined **Labor rate**.

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Tip: In the **Application configuration** settings (**Default values when adding work performed on a work order** section), you can specify whether you would like to copy in a specific labor rate for the duration entered in the **Time worked** box. In this section, you can also tell the application to behave differently when, for example, the equipment is under warranty and/or service contract.

To bill additional time or to simply adjust the time to bill, you can select the labor rate from the **Labor rate** dropdown list. The hourly rate is automatically entered when you select the labor rate. Then enter the billable time in the **Time** box.

Tip: As seen in the chapter on customers, personalized hourly rates can be created for a specific customer, if necessary. Please see the chapter on customers, more specifically the section on **Labor rates**, for more information.

Tip: Go to **Application configuration** to specify if the rates indicated in the labor rates are determined by the customer for whom the work order is completed or the customer to whom the work order will be billed.

If the application detects that the customer has at least one active bank of hours, the application will propose taking time from this bank of instead of billing the time to the customer. In such a case, the billing rate will become 0 and the time will be subtracted from the customer's bank of hours that you have specified in the **Bank of hours** dropdown list.

If the customer has multiple active banks of hours, you can specify the bank of hours to be used from the **Bank of hours** dropdown list. The application also indicates the amount of time remaining in each of the banks of hours and will notify you if the bank you've selected does not have enough time.

Please see the **Bank of hours** section in the chapter on customers for more information about banks of hours.

### **User defined fields**

In the **Work performed** section of a work order, it is possible to add additional fields that will allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

### **Billing summary**

This section summarizes the billable amounts for the work order. To adjust an amount or adjust tax rates, click on the button **Edit billing summary**, make your changes, and then click the **Save** button.

### **Documents**

It is possible to attach documents to each of your work orders. Simply click on the button **Add a document** to attach a document, or click on the **Trash can** button to the left of the document in the list to delete it.

### **Show follow-up**

Every time a work order changes status, or every time a work order is sent by email, the application creates a transaction in the work order's history. From the work order's file, click on the link **Show follow-up** (above the **Display URL** button) to display the work order's history. There you will see the dates and times at which a user changed the status of a work order or sent the work order by email.

### **Print**

To print a work order, go to its file and click on **Print**. Select the desired model form from the **Form**

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dropdown list, select the output format (normally a PDF) from the **Format** dropdown list, and then click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet browsers propose downloading the file before being able to view it.

## Email

It is possible to send work orders by email to your customers, technicians or any other recipient. To send a work order by email, from its file, click on the **Email** button to display the window **Send work order by email**.

In the **Send to** section, you can select one or more recipients from the list. Simply click on the box in this section to display the list of recipients. This list includes, for example, the customer contact person for the work order being sent, the list of your technicians, as well as the list of contacts in your address book.

In effect, NewWaySERVICE gives you the option to create your own personal address book, as well as a general address book for all users of the application. To manage the contacts in your address book (personal or general), click on the **Address book** button under the **Send to** section.

Under the **Send to** section, an additional box is available where you can directly enter one or more email addresses on an ad hoc basis, if necessary.

So that you don't have to enter the body of the message (or the subject) every time, you can create email models that you can use when necessary. Click on the **Manage email models** button to create or manage your email templates. Visit the section on **Email models** later in the documentation for more information about how to manage email models.

To load a model from your list of models, select it from the **Load an email model** dropdown list. When you select a model, the subject and message body will be replaced by those from the selected model.

Tip: Email models may contain variables. A variable is a tag that you can insert into your model's body or subject and which gets dynamically replaced when you select the email model.

For example, in the body of your email model, you can insert the tag **WoNumber**, which corresponds to the work order number. If you send work order number 2917 by email and you select this model, the **WoNumber** tag will be automatically replaced by the work order number (2917 in this example). Several variables are available. See the section on **Email models** later in the documentation for more information.

If you wish, you can attach a copy of the work order to the email as a PDF. In such cases, specify the model form to attach from the **Form to include** dropdown list.

If documents are attached to the work order, you can also join them to the email. In such cases, a **Documents** section will be displayed under the **Subject** section, which allows you to check the documents that you would like to attach to your email.

When you're ready to send your work order by email, click on the button **Send email**.

## Duplicate

It may sometimes make sense to create a new work order using the information already entered in another work order. This allows you to avoid typing the same text twice. This option is the Duplicate work order function. To duplicate a work order, go to the work order file to be duplicated and click on the **Duplicate** button. A window will open where you can specify if you would also like to duplicate the work order's appointments, the documents attached, and the work performed that was entered. Then click on the **Duplicate** button to continue creating the new work order.

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## Mark as completed

As seen earlier, a **Mark as completed** button exists in the work order that allows technicians to mark a work order as completed. When a technician clicks on this button, the application simply changes the status of the work order to a status that you have previously specified.

Please see the section on **Application configuration** earlier in the documentation for more information.

## My timer

When you open a work order's file, if you have the role of **Technician**, a **My timer** section will be displayed in the section **Status and other information** section.

Click on the **Start** button to start the timer for the work order. This is useful when you start working on a work order and you would like to track the amount of time worked. Click on the button again to pause the timer. You can start and pause the timer as often as you like. For example, you can pause the timer during your meal break and start it again when you return.

Click on the Stop button to stop the timer and save the timed time in a new work performed entry. The timed time will be automatically entered into the **Time worked** box and the date and time that the timer was started for the first time will be entered into the **Beginning of work** field. Once the timed time has been saved in the work performed section, the timer resets to zero. You can then restart the timer again by clicking on the **Start** button.

Tip: If necessary, you can go into a work performed entry that has already been created and adjust the time worked.

Lastly, click on the **Reset** button (trash can icon) to stop the timer and not save the time timed in a new work performed entry. The timer will simply reset to zero. You can then start a new timer by clicking on the **Start** button.

Tip: If you add a work performed entry and there is timed time, this time will be automatically entered into the **Time worked** box and the date and time that the timer was started for the first time will be entered into the **Beginning of work** field. Once the entry has been saved in the work performed section, the timer will reset to zero.

Tip: If a technician marks a work order as completed and he has timed work performed, a work performed entry with the equivalent duration will be automatically added to the work order when the technician marks it as completed.

In such cases, only the timed time for the technician who marks the work order as completed is added to the work performed. If other technicians have also used the timer for the work order, the other timers will be ignored.

## Customer signature

It is possible to have customers digitally sign the work order by clicking on **Customer signature** in the work order file. If you use a desktop computer, the customer will be able to sign using a mouse or a touchscreen, depending on the type of screen that is connected to your computer. If you click on the button using a tablet or smartphone, the customer will be able to sign using the tablet or phone's touchscreen.

The customer's signature is stored as a jpeg image file. The date and time that the customer signed are also displayed and integrated directly into the jpeg. This image displays on screen when you consult the work order or print it.

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To reset or erase the signature, click on **Remove signature**.

## Display URL

When you click on the **Display URL** button, the application displays a unique URL link that you can send to your customer by email. By going to this URL, your customer will be able to see certain information about the work order in question (for example, its status) without having to enter a password. In effect, each URL is unique and contains such a long number that it is practically impossible to forge the number, even by the most powerful computers in the world.

In order for the URLs to function, you must activate the customer portal beforehand. See the section on the **Customer portal** later in the documentation for more information.

Note that you can also specify which information in the work order the customer will be able to see in the **Customer portal** section.

Tip: The customer portal includes several options. If you've activated the customer portal and you have authorized customers to access it with a code and password in order to see the list of their work orders, they will not need a unique URL for the work order in order to view it, but the URL will nevertheless work.

Tip: It is possible to automatically add this link in an email when you send the work order by email. Simply insert the variable **WoUniqueUrlLink** into your email model. Please see the section on **Email models** later in the documentation for more information on the variables that you can enter in email models.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a work order. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Work orders** module. Refer to the **Questionnaires** section later in the documentation for more information.

## Quotes

The **Quotes** module is very similar to the **Work orders** module. If you haven't already, we recommend that you read the **Work orders** module section before reading this one.

A quote has almost the same structure as a work order, with the following differences:

The section **Work performed** on the work order is rather called **Work to perform**, on a quote. Unlike work performed entered on a work order, you cannot specify a technician or the date or time worked by the technician in works to perform that you enter on a quote. You can of course specify hours and service rates in the **Labor** section, but you cannot specify banks of hours there.

The date of the quote can be changed, unlike the date of the work order which is always equivalent to the date when the work order was created. The technician responsible is optional in a quote whereas it must be specified on a work order.

Of course, a quote does not contain an **Appointments** section neither a **Parts to be planned or to order** section. Additionally, no timer can be started in a quote nor a signature can be captured. Finally, a quote cannot be archived, has no priority and does not contain a **Labels** section.

The rest is virtually identical. You can specify a customer to be invoiced that is different from the customer for whom the work is to be performed. You can add as many equipment as you want. You can enter work to

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perform including parts to be used as well as labour.

Similar to work orders, you can create user defined fields here as needed. You can also add documents to your quotes print them or send them by email. You can also see there the status changes or whenever the quote has been emailed by a user, just by clicking on the **Show follow-up** option.

## Duplicate

As for a work order, you can duplicate a quote by clicking on the **Duplicate** button. In addition, you can also convert the quote into a work order, by clicking on the arrow to the right of the **Duplicate** button and then selecting the **Duplicate to work order** option. This option is very practical when, for example, your client has accepted your quote and you want to convert it into a work order to schedule appointments or simply track it.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a quote. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Quotes** module. Refer to the **Questionnaires** section later in the documentation for more information.

# Calendar of appointments

From this tab, you can manage all of the appointments you have added to your different work orders. Here you can modify, move, cut/copy/paste, and even delete appointments.

Tip: Only users who have the right to edit work orders at any time (regardless the status of the work order) can edit appointments from the **Appointment Calendar**. Otherwise appointments are displayed in read only mode.

Note that you cannot, however, add a new appointment to a work order from this tab. New appointments are normally added to work orders directly in the work orders.

Tip: One way to add a new appointment to a work order is by going to the Calendar of appointments and copying/pasting an appointment that already exists in the work order, then modifying or moving it as you wish, for example to another date or another technician.

The calendar of appointments offers you several views: **Vertical view per month**, **Vertical view per week**, **Vertical view per day**, **Planning per technician** and **Planning per work order**.

The vertical views are of style "Agenda" because hours are displayed vertically while the "Planning" views rather display hours horizontally. Change views simply by clicking on the button corresponding to the desired view.

Only active technicians and those who have the role of **Technician** are displayed in the calendar of appointments. You will notice that technicians are not displayed alphabetically, but are rather displayed in order of priority / seniority. To change the priority / seniority of each of your technicians, access their file then and modify the **Priority / Seniority** box.

To display the appointments according to the work order, click on the button that corresponds to the view **Planning per work order**. Displaying appointments according to the work order allows you to quickly view, for example, all of the appointments assigned to each work order for a given period. This is useful when you need to see, for example, all of the technicians who have worked or will be working on a specific work order.

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From the view **Planning per technician** or **Planning per work order**, click on the **Scale** dropdown list to specify the number of appointment days to display on the screen. You can view appointments for one day up to 56 days simultaneously. Click on the **Zoom** dropdown list to adjust the font size displayed on screen. Click on the date to change the reference date for displaying the appointments or click on the left and right arrows at each side of the date. Click on the **Sensitivity** dropdown list to adjust the degree of precision when you move or adjust an appointment.

No matter the view, it is possible to filter the appointments to be displayed according to the zone by clicking on the zones dropdown list. If the appointments are displayed according to technician, selecting a zone will display only the technicians that are assigned to that particular zone. If appointments are displayed according to work order, selecting a zone will display only the work orders for customers located in the zone selected.

**Tip:** If a technician has not been assigned to a zone, it means he or she covers all zones and will therefore appear in the list, regardless of the zone selected in the dropdown list.

You will see that the appointments are displayed in different colors. The color corresponds to the status of the work order that you have determined in the **Application configuration** option. You can move an appointment simply by dragging and dropping it to the desired day and time. Simply click on the appointment and, holding the mouse button down, move it. To change the duration of the appointment, place the mouse over the right border (if Planning view) or the bottom border (if Vertical view) of the appointment and, when the cursor changes to a double-pointed arrow, click while holding the mouse button down and move the mouse to change the duration of the appointment.

You can also simply click one time on the appointment to display its details. The appointment details will be displayed in a box under the appointment. In the detail box, you will see, for example, the work order number. Click on the work order number to go to its file. In the work order, click the **Back** button (to the left of the **Edit** button) to return to the calendar of appointments.

Also in the appointment detail box, you will see toolbar. Click on **Modify** (pencil) to directly modify the appointment (technician, date, time, and duration), rather than using the drag and drop function. Click on **Delete** (trashcan) to delete the appointment, or **Cut** and **Paste** to cut and paste.

**Tip:** In the Vertical views, you can Cut or Copy an appointment, then access appointments of another technician then paste the appointment there. This is another easy way to change the appointment technician.

## Export my appointments

With NewWaySERVICE, you can export your appointments directly to Google Calendar or to an iCal file. From the view **Planning per technician** or **Planning per work order**, click on the button **Export my appointments**, located at the bottom of the calendar of appointments, to go to this option.

On this page, select the time period of appointments to export as well as the destination, then click on **Export**. If you export to Google Calendar, if it has not already been done, the application will ask you to authenticate your Google account before being able to export your appointments to your calendar. If you export to an iCal file, the file will be generated and then you will be able to open it or download it using your internet browser.

**Tip:** Only your own appointments will be exported, and not appointments for other technicians.

## Map

In this tab, you can see the positions of your technicians on the road in real-time, thanks to the GPS in their

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smartphone or tablet. You can also see appointment locations for each of your customers, their “home base” (address provided in their file), and the company's location (address entered into the option **Information about your company**). Simply check or uncheck the appropriate boxes to specify which addresses you would like to display on the map.

Tip: The map displayed in this tab is produced with the help of Google Maps® and displays addresses in most regions of the world.

Tip: In order for the technician's position to be displayed on the map, you must enable geolocation in NewWaySERVICE in the option **Map parameters**.

In addition, technicians must authorize their internet browser to access their GPS position by answering **Yes** to the question **Would you like to share your position with the website app.NewWaySERVICE.com**, asked by the browser.

If the technician's position is not displayed on the map or the technician's browser does not ask this question, consult **FAQ #5007** in the **NewWaySERVICE Help and support** section. In effect, the question or configuration may differ depending on the browser and/or the device used (phone, tablet, etc.). You can also access this FAQ at the following link:

[https://app.newwayservice.com/faq-view.php?faq\\_number=5007&language=en](https://app.newwayservice.com/faq-view.php?faq_number=5007&language=en)

If you display your customers' appointments, you must indicate the period of appointments to display using the dates fields. A maximum of 31 days of appointments may be displayed simultaneously on the map.

Each icon displayed on the map corresponds to either an appointment, a technician's current position, a technician's home base, or your company. When you click on an icon, additional information will be displayed in a window. In the case of an appointment, you can click on the work order number in the window to go directly to the work order's file. In the work order, click the **Back** button (to the left of the **Edit** button) to return to the map.

Tip: To change the icons or their colors, simply go to **Map parameters** in the **Configuration** menu, located in the **More** tab, or by clicking on the icon (gear) in the upper right corner of the map.

Tip: In the window that displays the additional information, click on the link **View on Google Maps** for other options.

By default, the map will try to display everything that you have asked it to display. If all of the addresses are concentrated in the same region, the map will be focused on this region. If, however, the map must display addresses throughout the country or even addresses in different countries, the initial zoom for the map will be different to try to display all of the addresses on screen. Once the map is displayed, use the **Plus** and **Minus** icons located in the bottom right of the map to enlarge or reduce the map's focal zone. You can also do this using your mouse's scroll button. To move the center of the map, use the drag and drop function using your mouse.

Tip: In the map, you can also switch to Google Street View® simply by clicking on the person icon, located above the Plus and Minus buttons located in the bottom right corner of the map, and moving the icon to the desired location.

Tip: Since the map is produced by Google Maps®, the ways to interact with the map are decided by Google and may differ depending on the browser or device used.

Lastly, it is possible to display only the addresses in a single zone by clicking on the **Zones** dropdown list located in the upper left corner. In such cases, only technicians included in the zone selected will be displayed, regardless of their current GPS position, as well as appointments for customers only included in the zone selected.

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Tip: If a technician has not been assigned to a zone, it means he or she covers all zones and will therefore appear in the list, regardless of the zone selected in the dropdown list.

## Dashboard

This tab is divided into two sub-tabs.

### Appointments sub-tab

If you have the role of Technician, this tab allows you to see your list of appointments for a specific day at a glance. It also allows you to quickly see what you have planned for the day, as well as the status of each of the day's work orders. From this tab, you can start or stop any timer, without having to go to the work order concerned. You can even mark any of the day's work orders as completed.

Tip: If you are the technician who is responsible for certain work orders (or you created the work order), if you wish, you can also see other technicians' appointments for those work orders simply by clicking on the appropriate option in the dropdown list.

This also applies to subcontractors (technicians with the box **Limit the technician to see only his work orders. This option is perfect for subcontractors** checked.)

If you have the role of **Dispatcher** or **Administrative staff**, you can see the appointments for all technicians. In such cases, you can even (according to your rights) start and stop the timer for other technicians.

Also in this section, you will find a summary of your work orders, according to their status and whether they are archived. Simply click on the work order's number to go to the **Work orders** tab. A filter will automatically be applied so that you only see the work orders that correspond to your selection.

Once again, if you have the role of **Dispatcher** or **Administrative staff**, you can also see a summary of the work orders, but for all technicians.

Other useful information is also displayed in this section, for example, the list of work performed recently.

### Timers in progress sub-tab

If you have the role of Technician, this tab allows you to see all of the timers you have started, regardless of the work order or date. Even if the timer is currently paused, it will still be displayed. In this tab, you can quickly see if you've forgotten to stop a timer for a work order, among other things.

Tip: Whether you start or stop a timer for a work order in this tab, the Appointments tab or the work order's file, the result will be the same. A timer may be started in one tab and stopped in another.

Tip: If you are the technician who is responsible for certain work orders (or you created the work order), if you wish, you can also see other technicians' timers for those work orders simply by clicking on the appropriate option in the dropdown list. This also applies to subcontractors (technicians with the box **Limit the technician to see only his work orders. This option is perfect for subcontractors** checked.)

If you have the role of **Dispatcher** or **Administrative staff**, you can see the timers for all technicians. In such cases, you can even (according to your rights) start and stop the timer for other technicians.

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## Limited view

The NewWaySERVICE application has two views, Standard View and Limited View. Before NewWaySERVICE became 100% responsive, the Limited view was mainly used by technicians in the field who wanted to access the application using their smartphone because this view, which is actually a simplified view, was suitable for devices with small screens.

Since the user interface of NewWaySERVICE is now responsive and adapts automatically regardless of the size and orientation of the screen, the Limited view is now mainly used to restrict the user to a minimum of options in the application.

**Tip:** Before, the Limited View was called Mobile View.

You can switch from one view to another at any time. From the Standard view, to switch to the Limited view, click on the tab **More** then select option **Switch to Limited view**. From the Limited view, click on the menu button in the upper right corner and select **Switch to Standard view**.

From the welcome screen in the Limited view, you can see all of the work orders (appointments) scheduled for the day selected. If you have timers in progress (even timers that are paused), you will also see those work orders in the list, regardless of the date of the appointment or the date on which you started the timer. This allows you to see your timers in progress at all times.

**Tip:** As with the dashboard for the Standard view, if you are the technician responsible for certain work orders (or you created the work order), you can, if you wish, also see other technicians' appointments and timers simply by clicking on the appropriate option using the Filter button (Funnel icon), located in the upper left of the screen.

This also applies to subcontractors (technicians with the box **Limit the technician to see only his work orders. This option is perfect for subcontractors checked.**)

If you have the role of **Dispatcher** or **Administrative staff**, you can see the appointments and timers for all technicians. In such cases, you can even (according to your rights) start and stop the timer for other technicians.

You can view the details for a work order by clicking on it. Most of the options in the Standard view are also available here, including a **Timer** button to automatically calculate the time worked. See the subsection **My timer** in the section on **Work orders** earlier in the documentation for more information on how timers work.

Click on the **Time** button to add the time worked as well as the description of the work performed. If time was timed using a timer, it will be automatically entered. Click on the **Parts** button to enter the parts used.

**Tip:** In the Standard view, when you add work performed, you can specify the amount of time worked, the billable time (Labor) and the parts used.

This is simplified in the Limited view. In effect, you must simply click on the **Time** button to enter the time worked or the **Parts** button to enter the parts used. The result is the same since one or more work performed entries will be created for you. This makes it simpler and faster for technicians on the road.

Note that by default, in the Limited view, the application automatically enters the time in the Labor section for the work performed entry (according to the behavior you previously specified in the **Application configuration settings, Default values when adding work performed on a work order** section). By default, technicians do not have access to the Labor section in the Limited view. The same applies for the price of parts. By default, from the Limited view, technicians do not see the price of parts but the price is automatically added nevertheless, according to the price specified in the part's file. If you want the technician to have access to this information via the Limited view also, in such case, check the option

**View/Edit billing information (Parts prices, Labor, Taxes...)** in the **Additional rights - Work Orders** section in the technician file.

Of course, if you've given a technician the right to switch to the Standard view (if you want, you can limit technicians to the Limited view only), from the Standard view, he or she will be able to see the labor rates as well as the prices for parts because this information is always visible via the Standard view.

**Tip :** In the Limited view, if you do not have the role of Technician, you will not be able to add time or parts to a work order nor capture the customer's signature or add documents. However, you will be able to edit time or parts already entered by other technicians.

It is also possible to add documents to the work order in the Limited view. This is especially useful when, for example, a technician must take photos of the equipment using a smartphone or tablet and then add them to the work order. This is done by simply clicking on the **Add a document** button.

As in the Standard view, click on the **Customer signature** button to have your customer sign directly on your mobile device's touchscreen. The signature will be automatically saved in the work order. Click on **Mark as completed** to mark the work order as completed. The work order's status will be changed automatically. Once again, consult the section on **Work orders** earlier in the documentation for more information on these options.

Lastly, click on the **Map** button to see the customer's address on GoogleMaps®.

## Suppliers

The Suppliers module is used to manage the suppliers that you specify on your purchase orders. To manage your suppliers, select the **Suppliers** option under the **More** tab. There you will find the list of suppliers. Simply click on the **Add new supplier** button to add a supplier, or click on the supplier's name in the list to access its file.

When adding a supplier, you must enter the supplier's name, at the minimum. The name must be unique; there cannot be two suppliers with the same name. You can also enter a code for the supplier. This field is optional but, if you enter a code, it must also be unique as there cannot be two suppliers with the same code.

You can then enter the supplier's address as well as information about the main contact person for the supplier.

The **Category** field allows you to specify the supplier category. However, categorizing suppliers is not mandatory. Supplier categories are simply a way to group suppliers. For example, from the list of suppliers, you can filter your suppliers according to one or more categories so that you only see the suppliers in those categories displayed. Or, when printing a report that displays the list of suppliers, you can indicate that you would only like to print suppliers belonging to certain supplier categories.

**Tip:** Use the **Plus**, **Pencil**, and **Trash** can buttons located to the right of the **Category** dropdown list to manage this information.

If you enter text in the fields **Our customer#**, **Payment term** or **Special instructions**, when you create a new purchase order and you select a supplier, the text that you have entered in these different fields is automatically copied into the corresponding fields in the purchase order.

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Use the **Internal notes** field to enter information about your supplier. This field is not printed on purchase orders.

To deactivate a supplier, select **Inactive** in the **Status** section. No data will be erased (such as, for example, purchase orders), even if you set a supplier to inactive.

The other fields are optional and are available for information purposes only. These fields do not change the application's functionalities.

### User defined fields

As with most of the application's other modules, it is possible to add additional fields in your suppliers' files that allow you to store information that is specific to your company. See the section on **User defined fields** later in the documentation for more information on how to add additional fields.

### Supplier part codes

If certain part codes that you have entered in NewWaySERVICE are different from the supplier's part codes, in this section you can indicate the supplier part code for each of your parts. You can also use this option to enter your regular purchase price for the supplier, as well as part descriptions that are unique to the supplier.

Then, when you add a part to a purchase order, the part code used by your supplier (supplier selected in the purchase order) will be printed on the purchase order and not your own part code. This also applies for the cost specified and the description.

Tip: There is also a **Supplier part codes** section in the part's file. The principle is the same, except in this case, you must specify a list of suppliers instead of a list of parts.

### Documents

It is possible to attach documents to each of your suppliers. To do so, simply click on the **Add a document** button. To delete it, click on the **Trash can** button to the left of the document in the list.

### Print

To print a supplier's file, go to its file and click the **Print** button. Select the desired form model in the **Form** dropdown list. Select the output format (normally PDF) from the **Format** dropdown list, then click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Note that some internet browsers propose downloading the file before being able to view it.

### New purchase order

It is possible to create a purchase order for a supplier directly from its file. From the supplier's file, simply click on **New purchase order**. The New purchase order window will open and the supplier will already be selected.

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Tip: A quick way to see the list of a supplier's purchase orders is to go to the supplier list and then click on the number in the Orders column.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a supplier. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Suppliers** module. Refer to the **Questionnaires** section later in the documentation for more information.

## Purchase orders

This module is used to track your orders for parts with your different suppliers. When you process the reception of a purchase order, the parts inventory is automatically updated.

To manage your purchase orders, select the **Purchase orders** option under the **More** tab. There you will find the list of your purchase orders. Simply click on **New purchase order** to create a new one, or click on the order number in the list to go to the order.

When adding a new purchase order, in the **Main information** section, you must select the supplier to whom the order is addressed. Position your cursor in the **Supplier** box and then begin entering the supplier's name or code. As you enter the characters, if the application finds suppliers that correspond to what you have entered, they will be proposed in a list that will appear under the **Supplier** box. Select the desired Supplier from the list by clicking on it. The supplier's information, including its address, contact information, payment term and customer#, will be automatically copied in the purchase order. If information has already been entered in the **Special instructions** field in the supplier's file, it will also be copied in the **Special instructions** field in the purchase order.

If it is a new supplier, simply enter its name in the **Supplier** box and it will automatically be created when you click on the **Save** button for the purchase order.

Tip: If you do not have the role of Dispatcher, you will not be authorized to create a supplier via a purchase order unless you have previously obtained the rights to do so.

All of the other fields in the purchase order are optional or have default values. Nevertheless, here is a description of each of these fields.

### Special instructions and Internal notes

This field contains the special instructions that are entered in the supplier's file. You can enter additional information as needed. This field is normally printed on the purchase order.

The **Internal notes** field allows you to enter notes that are not printed on the purchase orders.

### Ship to

In this section, you can specify where the order must be shipped. By default, your company's address (the address you have entered in the **Information about your company** option) is

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entered, but you can specify the address of one of your warehouses by clicking on the button with a warehouse and a down arrow. You can also specify to send the order to one of your customers. In that case, position your cursor in the **Name** box and begin to enter your customer's name or code. As you enter the characters, if the application finds one or more customers that correspond to what you have entered, they will be proposed in a list that will appear under the **Name** box. Select the desired customer from the list simply by clicking on it. The customer's information will be automatically copied in the **Ship to** section for the purchase order.

### User defined fields

As with most of the application's other modules, it is possible to add additional fields to purchase orders that allow you to store information that is specific to your company. See the section on **User defined fields** later in the documentation for more information on how to add additional fields.

### Purchase order details

In this section, you can add the parts to be ordered to the purchase order. Simply click on the **Add line** button to add a new line with the part to be ordered or click on the line number to modify it.

Position your cursor in the **Part** box and begin entering the part's description or code. As you enter the characters, if the application finds parts that correspond to what you have entered, they will be proposed to you in a list that will appear under the **Part** box. Select the desired part from the list simply by clicking on it. The part's description and code will be copied in the code and description fields in the purchase order.

Tip: If a Supplier part code has been entered in NewWaySERVICE (in a part's file or in the supplier's file), that is the code and/or description that will be copied in the code and description fields in the purchase order description line, and not the code and description from the part's file. Please see the sections on **Supplier part codes** in the supplier's file or in the part's file earlier in the documentation for more information.

If it is a new part, simply enter a description in the **Part** box and it will automatically be created when you click on **Save**.

Tip: If you do not have the role of **Dispatcher**, you will not be authorized to create a new part via a purchase order unless you have previously obtained the rights to do so.

Tip: The part specified in the **Part** field on the purchase order line is never printed on the purchase order. However, the Supplier part code and **Description** fields are printed since the supplier's part code or description may be different from your own part code or description. The **Part** field therefore serves to indicate to the application which part the line is referring to. The quantity for this part will also be adjusted when you receive the purchase order.

Tip: If you do not enter anything in the **Part** field, the line will not be linked to any part and can therefore not be received. This is especially practical when you would like to, for example, enter comments in the purchase order.

### Receiving orders

To indicate to the application that you have received a purchase order and update the inventory at the same time, click on the **Receive parts** button. From this page you can indicate, in the **Qty**

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**receiving now** box, the quantity received for each line of the purchase order. By default, the application automatically enters the quantity that remains to be received, but you can change this quantity. This allows you to make partial receptions as an unlimited number of receptions can be entered for each purchase order.

You must also specify the warehouse where you have received each line of the order. By default, it is the warehouse that you have specified in the purchase order that will be selected.

You can enter a reference number, such as a reception number, in the **Order reception reference number** box. Click on the **Save** button to proceed to reception. The quantity in the inventory will immediately be adjusted for each line where you have indicated that a quantity has been received.

Tip: If you have entered an incorrect quantity (too many parts, for example) upon reception, you can simply enter a new reception with a negative qty to adjust the inventory.

Tip: When at least one reception has occurred for a line in the purchase order, the Qty received column becomes clickable. Simply click on the quantity to see a history of receptions for the line in question.

## Documents

It is possible to attach documents to each of your purchase orders. Simply click on the **Add a document** button, or click on the **Trash can button** to the left of the document in the list to delete it.

## History

Each time a purchase order changes status, a transaction is created in its history. From the purchase order, click on the **History** link (above the **Print** button) to display the purchase order's history. There you will see the date and time where the status changed, as well as by which user.

## Print

To print a purchase order, go to its file (by clicking on its number in the list), then click on the **Print** button. Select the desired form model from the **Form** dropdown list, select the output format (normally PDF) from the **Format** dropdown list, and then click **Print**. The application will generate the file and send it to your internet browser so that you can view it. Note that some internet browsers propose downloading the file before being able to view it.

## Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to a purchase order. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Purchase orders** module. Refer to the **Questionnaires** section later in the documentation for more information.

## Labor rates

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As seen previously in the documentation, when adding work performed to a work order, you can specify the amount of billable time in the **Labor** section. You can manage these billing rates from the menu **Other options | Labor rates** in the **More** tab.

Simply click on **New labor rate** to add a new labor rate or click on its description in the list to modify it.

When adding a labor rate, you must enter a description. The labor rate description must be unique; there cannot be two labor rates with the same description. Then enter the billing rate for the labor rate.

**Tip:** As seen in the **Customers** section earlier in the documentation, this labor rate can be personalized for specific customers.

Lastly, to deactivate a labor rate that you no longer use, set its status to **Inactive**. This labor rate will no longer be available in the **Labor** section for new work orders, but it will remain in former work orders for historical purposes. This is the way to stop seeing a labor rate since it is impossible to delete a labor rate that is used in at least one work order.

## Work schedules and holidays

As discussed in the **Technicians** section earlier in the documentation, in order for NewWaySERVICE to be able to propose appointments only during your technicians' work hours, we recommend creating one or more work schedules to assign to your technicians.

To manage work schedules, select the menu **Other options | Work schedules** located in the **More** tab. Simply click on **New work schedule** to add a new work schedule or click on its description in the list to modify it.

A work schedule is the working hours for a given period (1, 2, 3, or 4-week periods), such as 8 am to noon and 1pm to 5pm, from Monday to Friday. Once you've created your work schedules, you can assign your technicians to them.

When adding a work schedule, you must enter a description. The work schedule description must be unique; there cannot be two work schedules with the same description. Then specify the number of weeks (one to four) included in this schedule.

For example, if your work schedule has exactly the same times and work days every week, simply enter **1** in **Number of weeks in cycle** and then specify the workable hours in the **Week 1** tab. The other tabs (Week 2 to 4) will be automatically deactivated. However, if a technician must work Saturday every other week, for example, in this case the work schedule for Week 1 will be different from the work schedule for Week 2. In such cases, enter **2** in the **Number of weeks in cycle** and the **Week 1** and **Week 2** tabs will become active. In the Week 1 tab, specify the workable hours (for example, excluding Saturday) and in the tab for Week 2 specify the workable hours including Saturday. In such cases, the application will automatically know that the technician works every other Saturday.

**Tip:** Using the previous example, when you go to a technician's file to assign this work schedule, you must specify the date on which the specified work schedule will begin. Based on this date, the application will know if the technician is in Week 1 or Week 2 of the schedule specified.

To specify the workable hours for a given week, click in a cell in the week, hold the mouse button down and move it to select multiple cells. Once your selection has been made, release the mouse button and click on **Add selection** at the top of the schedule. To remove workable hours, repeat the process but click on **Remove selection**.

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Lastly, click on **Save** at the bottom of the window to save the changes made to your work schedule.

## Public holidays

NewWaySERVICE uses work schedules to assign appointments to technicians during their work hours. So that you don't have to modify work schedules for every public holiday or vacation, you can tell the application the public holiday dates for each technician. In such cases, the application will not affect the appointments for the technician concerned on that date, regardless of the work schedule that is currently assigned to him or her.

To manage your holidays, click on the **More** tab, and then select the menu **Other options | Holidays** option. Simply click on the **New holiday** button to add a holiday or click on the date of the holiday to modify it.

When adding a holiday, you must enter a description and a date. The date must be unique; there cannot be two holidays with the same date. Then check the technicians who will be off work on that day and click on **Save** to save your changes.

## Email notifications

You can tell NewWaySERVICE to automatically send an email notification to your customers, technicians, or any other recipient when an event is taking place or is about to take place. There are three types of notifications in NewWaySERVICE: notifications related to work orders, notifications related to equipment and notifications related to banks of hours.

### Notifications related to work orders

Notifications related to work orders are divided into two categories: notifications triggered by an event and notifications triggered after a certain timeframe.

A notification is triggered by an event when someone creates or modifies a work order. You can create notifications triggered by the following events:

- When a work order is created (regardless of its origin);
- When a work order is created via the customer portal;
- When a work order is created via a maintenance schedule;
- When the status of a work order changes to any status; or
- When the status of a work order changes to a specific status.

When one of these events occurs for a work order, the application verifies if you have created notifications for each type and, if so, it will send a notification to the recipients that you have specified.

A notification that is triggered after a certain timeframe will be triggered only if a work order has remained unchanged (has not changed status) for a given amount of time. When you create this type of notification, you can also tell the application to trigger the notification only when the work order has a certain status or priority level.

To manage email notification related to work orders, select the **More** tab. Then select **Email notifications**, and the submenu **Related to work orders**. Simply click on **New notification** to add a new one or click on its description in the list to modify it.

When adding an email notification related to work orders, a window will be displayed and you must first specify the type of notification to add, either a **notification triggered by an event** or a **notification triggered after a certain timeframe**, and click **Ok**. You must then enter a description and specify the event

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or duration, depending on the type of notification you've chosen.

Then specify the email recipients by checking the appropriate boxes in the section **I want to send an email to**. At the bottom of the section, you will find an additional box for **Additional recipients** where you can, if necessary, directly enter one or more email addresses. In this box, you will also find an **Address book** button which will take you to your address book to select the recipients.

If you wish, you can attach a copy of the work order in PDF form to the email. In such cases, specify the model form to attach from the **Form to attach to email** dropdown list.

You can also check the box to **Request a read receipt**. If you have already prepared an email model, you can select the option **Use existing email model**, and then select the model from the dropdown list. Otherwise, select the option **Write my own email below** and enter the subject and body of your email.

Tip: Use the green **Load an email** button in the button menu for the message body to load an existing email.

Tip: Use the green **Insert a variable button** in the button menu for the message body to insert work order variables. As seen previously in the documentation, a variable is a tag that you can insert into the email body or subject and which is dynamically replaced when the application sends the email. See the section on **Email models** later in the documentation for more information.

By default, if you do not specify any criteria for your notification, it will be sent regardless of the work order. However, if you wish, you can filter the notifications to send according to different criteria (for example, according to the customer for the work order or the equipment type contained in it). If necessary, specify the desired criteria in the **Criteria** section.

Lastly, click the **Save** button to save your changes.

## Notifications related to equipment

Notifications related to equipment are used to send a notification by email when a warranty or service contract for a piece of equipment is about to expire. You can tell the application to send this type of notification up to 365 days before the end of the warranty or service contract.

To manage email notifications related to equipment, select the **More** tab. Then select **Email notifications**, and the submenu **Related to equipment**. Simply click on **New notification** to add a new one or click on its description in the list to modify it.

When adding an email notification related to equipment, you must enter a description, specify the type of notification (**Before the end of the warranty** or **Before the end of the service contract**), and then specify the number of days in advance that you would like the notification to be sent.

Then specify the email recipients by checking the appropriate boxes in the section **I want to send an email to**. At the bottom of the section, you will find an additional box for **Additional recipients** where you can, if necessary, directly enter one or more email addresses. In this box, you will also find an **Address book** button which will take you to your address book to select the recipients.

If you wish, you can attach a copy of the equipment file in PDF form to the email. In such cases, specify the model form to attach from the **Form to attach to email** dropdown list.

You can also check the box to **Request a read receipt**. If you have already prepared an email model, you can select the option **Use existing email model**, and then select the model from the dropdown list. Otherwise, select the option **Write my own email below** and enter the subject and body of your email.

Tip: Use the green **Load an email** button in the button menu for the message body to load an existing

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email.

Tip: Use the green **Insert a variable** button in the button menu for the message body to insert equipment record's variables. As seen previously in the documentation, a variable is a tag that you can insert into the email body or subject and which is dynamically replaced when the application sends the email. See the section on **Email models** later in the documentation for more information.

By default, if you do not specify any criteria for your notification, it will be sent regardless of the equipment. However, if you wish, you can filter the notifications to be sent according to different criteria, such as the customer to whom the equipment is assigned or the equipment type. If necessary, specify the desired criteria in the **Criteria** section.

Lastly, click the **Save** button to save your changes.

Tip: Even though our system checks email notifications related to equipment multiple times per day, the email is not sent immediately. For example, if you create a new notification related to equipment right now, several minutes or even several hours may go by until our systems send the email.

Contrary to notifications related to work orders, they are continuously checked by our systems; notifications related to equipment are checked less frequently because they do not need to be checked more often than that.

## Notifications related to banks of hours

Notifications related to banks of hours are used to send a notification by email when the expiration date of a bank is about to arrive or the number of hours remaining for a bank reaches a certain threshold.

To manage email notifications related to banks of hours, select the **More** tab. Then select **Email notifications**, and the submenu **Related to banks of hours**. Simply click on **New notification** to add a new one or click on its description in the list to modify it.

When adding an email notification related to banks of hours, you must enter a description, specify the type of notification (**Before bank of hours expiration date** or **Before bank of hours become empty** or both). In the case of expiration date, specify the number of days in advance that you would like the notification to be sent.

Then specify the email recipients by checking the appropriate boxes in the section **I want to send an email to**. At the bottom of the section, you will find an additional box for **Additional recipients** where you can, if necessary, directly enter one or more email addresses. In this box, you will also find an **Address book** button which will take you to your address book to select the recipients.

You can also check the box to **Request a read receipt**. If you have already prepared an email model, you can select the option **Use existing email model**, and then select the model from the dropdown list. Otherwise, select the option **Write my own email below** and enter the subject and body of your email.

Tip: Use the green **Load an email** button in the button menu for the message body to load an existing email.

Tip: Use the green **Insert a variable** button in the button menu for the message body to insert bank of hours or customer record's variables. As seen previously in the documentation, a variable is a tag that you can insert into the email body or subject and which is dynamically replaced when the application sends the email. See the section on **Email models** later in the documentation for more information.

By default, if you do not specify any criteria for your notification, it will be sent regardless of the bank of hours or customer. However, if you wish, you can filter the notifications to be sent according to different criteria, such as the bank of hours customer. If necessary, specify the desired criteria in the **Criteria** section.

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Lastly, click the **Save** button to save your changes.

Tip: Even though our system checks email notifications related to banks of hours multiple times per day, the email is not sent immediately. For example, if you create a new notification related to banks of hours right now, several minutes or even several hours may go by until our systems send the email.

Contrary to notifications related to work orders, they are continuously checked by our systems; notifications related to banks of hours are checked less frequently because they do not need to be checked more often than that.

## Email models

As seen previously, it is possible to send work orders by email. The application can also send email notifications (email notifications related to work orders, email notifications related to equipment and email notifications related to banks of hours).

So that you don't have to enter the subject or body of the message each time, NewWaySERVICE allows you to create email models. Email models can be managed in the application in all locations where it is necessary, for example, when sending a work order by email or when modifying email notifications.

Tip: The list of email models will be different depending on whether you access this option when modifying notifications related to equipment, notifications related to work orders or notifications related to banks of hours.

In such cases, either an email concerning a work order, an email concerning equipment or an email concerning a bank of hours will be sent, which is why NewWaySERVICE provides different email model lists.

From the **Manage email models** window, click on the **New model** button to create a new model, **Edit model** to make changes to an existing model, **Copy model** to copy a model to a new model, or **Delete model** to delete it.

When adding or modifying an email model, you must enter a description for your model. This is the description you will see in the dropdown lists that allow you to choose the email model. Then enter the subject and the body of your email. The body of the email can be formatted using the toolbar located above the email body.

Tip: You can specify if you would like the email to be sent in text format only or in HTML format. Text format is useful when you would like your email to be sent without any HTML tags that specify, for example, fonts or font colors.

As seen previously, email models may contain variables. A variable is a tag that you can insert into your email model's body or subject and which gets dynamically replaced when you select the email model.

For example, in the body of your email model, you can insert the tag **WoNumber**, which corresponds to the work order number. If you send work order number 2917 by email and you select this model, the **WoNumber** tag will be automatically replaced by the work order number (2917 in this example).

Several variables are available. To view the list of variables or to insert a variable into the body of your email, click on the green **Insert a variable** button (represented by a star), available in the toolbar above the email body. From this list of variables, simply double-click on the desired variable to insert it into the body of your email or click on **Select**.

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Tip: If you know the name of the variable, you can enter it directly into the body of your message, without having to use the **Insert a variable** option. However, it is important that the case (upper/lower case) of the variable's name is respected.

You can also enter variable names in your email's subject line.

Lastly, the variables available in the list are different depending on whether you are modifying an email model related to a work order, an email model related to equipment or an email model related to a bank of hours. In effect, entering a work order variable into an email relating to equipment will have no effect, and vice versa.

When you've finished modifying your email model, click on **Save** to save your changes.

## Email configuration

When users send a work order by email manually through the application or when the application itself sends automated email notifications, the application usually sends these emails in your name or your company's name.

So, this is from this option that you can indicate the name and/or address of the sender for these emails. To access this option, click on the **More** tab and then select the menu **Configuration | Email configuration**.

This option is divided into two parts. Since in some cases, it is the application that can automatically send an email (for example emails notification when status of a work order changes) and in other cases it is the user who can manually send an email (for example when sending a work order by email), so the two ways to send an email are configurable individually.

### Emails sent by the application

From this option, enter the sender's name in the box **Sender name** and indicate which email address should be used as the sender's email address for these emails.

The main benefit about using [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com) as the sender address is that you are certain that the email will be received by the recipient because NewWaySERVICE.com servers are authorized to send emails on behalf of [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com). Just enter your email address in the **reply-to address** box so if the recipient responds to the email, the reply will be sent to this address instead of [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com).

Tip: Email address [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com) is unmonitored. Any message received at this address is automatically deleted.

If you choose to use another e-mail address as the sender address instead of [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com), make sure NewWaySERVICE.com's servers are allowed to send email messages in your name. This is usually done by adding an SPF record in the DNS configuration of your domain name (the domain name of the sender's email address you specified).

Indeed, to avoid fraudulent emails or prevent spam, some mail servers conduct additional verifications and will not accept your emails if they come from servers that have not been previously authorized. For more information, see our FAQ #5005 about this topic via the **Help and Support** option of NewWaySERVICE or just visit the following link: [https://app.newwayservice.com/faq-view.php?faq\\_number=5005&language=en](https://app.newwayservice.com/faq-view.php?faq_number=5005&language=en).

Check the box **Always send a copy to the following email address** and enter the email address in the appropriate box if you would like for a copy of the emails sent by the application to be sent to this address.

Check the box **Activate Test mode** and enter the email address in the appropriate box if you do not want emails sent by the application to be sent to the recipient and you want to send them only to the address specified. This function is useful at the beginning when you would like to conduct tests with the application. Don't forget to uncheck this option when you have finished your tests.

## Emails sent by users

For these emails, as the sender's address, you can indicate to the application to use the user's email address, address [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com) or specify an email address.

The main benefit about using [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com) as the sender address is that you are certain that the email will be received by the recipient because NewWaySERVICE.com servers are authorized to send emails on behalf of [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com). Just check the box **Put the email address of the user as the reply-to address** so if the recipient responds to the email, the reply will be sent to this address instead of [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com).

Tip: Email address [unmonitored@NewWaySERVICE.com](mailto:unmonitored@NewWaySERVICE.com) is unmonitored. Any message received at this address is automatically deleted.

If you indicate to use the user's email address or if you specify an email address, make sure NewWaySERVICE.com's servers are allowed to send email messages in their name. This is usually done by adding an SPF record in the DNS configuration of the domain name or the sender's email address.

Indeed, to avoid fraudulent emails or prevent spam, some mail servers conduct additional verifications and will not accept your emails if they come from servers that have not been previously authorized. For more information, see our FAQ #5005 about this topic via the **Help and Support** option of NewWaySERVICE or just visit the following link: [https://app.newwayservice.com/faq-view.php?faq\\_number=5005&language=en](https://app.newwayservice.com/faq-view.php?faq_number=5005&language=en).

Tip: You can also check the box **Put the email address of the user as the reply-to address** when you specify to use a specific email address as the sender address.

Finally, click on **Save** to save your changes.

## Chat

A chat option is available directly in NewWaySERVICE to chat between users. No need to use an external application for this. You can also exchange files or photos directly from this option.

Just click the **Chat** button at the top of the page to start chatting with another technician, dispatcher or any other NewWaySERVICE users.

Tip: The **Chat** button blinks slowly when you have received new messages from another user.

Tip: As previously stated in the documentation, even if you use the option **Log in as another user** to test its access rights, you will never be able to see their conversations via the **Chat** option. Each user's chat conversations remain private at all times and can only be accessed by the user itself.

## Customer portal

The customer portal is a website that offers several options to your customers. Among other things, they can submit their work orders via a web page whose settings you can configure, consult the list of their work orders or the list of their banks of hours, and even consult a specific work order, without needing a password, thanks to a unique URL address.

These different options can be activated individually, depending on your needs. To begin, to activate the customer portal, simply go to **Customer portal configuration**, available in the **More** tab in the **Configuration** menu.

To access the customer portal, your customers will use a URL address in the following format: *alias*.NewWaySERVICE.com, where you can choose the *alias*. To make it easier to remember for both you and your customers, when possible, we recommend entering your company's name (without spaces) as the alias. To change the alias, click on **Change URL** and enter the new alias. The alias must not contain spaces, accented characters or special characters, and it must have a maximum of 15 characters.

**Tip:** To make it easy for your customers to access the portal, put a link on your website that points directly to your customer portal at *alias*.NewWaySERVICE.com. Ask your webmaster to add this link for you.

In addition, once you have chosen your alias, we do not recommend changing it. If you change it, the former URL address (*alias*) will immediately stop working.

Once you've chosen your alias, the section **URL link(s) to access the customer portal** specifies the address where you can directly access the different sections of the portal. This section also specifies the HTML code you must add to your web page if you would like to add one or more links to your website that point toward the customer portal.

In the **Access** section, you can decide which portal options you would like to activate by selecting the appropriate options.

Then, depending on the options you have chosen, you can personalize and/or configure each of them in their respective sections.

**Tip:** If you activate the customer portal and you specify that a customer code and password are required to access it, the customer code and the password that your customers must use are the ones you have specified in the field **Portal password** in the customer's file.

### When a customer enters a work order

In this section, you can personalize the web page that will be displayed to allow your customer to submit a new work order. You can decide which fields in the work order you would like to display on this page. You can also indicate if the field must mandatorily be completed by your customer. In addition, you can change the labels for certain fields. It is also possible to display the user defined fields that you have added in the **Work orders** and **Work orders/Equipment types** modules.

In addition to determining the fields to display, you have access to additional options to personalize the web page further down. If you wish, you can even authorize customers to upload a document when entering a work order. In such cases, the file will be automatically attached to the work order in the **Documents** section.

**Tip:** Once the customer has submitted their work order via the customer portal, the work order will be displayed in the **Work orders** tab along with the others, but it will have the label **Created via the customer portal**.

It is also possible to ask the customer to fill in a questionnaire that you have previously created from the **Questionnaires** option, by selecting it from the drop-down list named **The customer must also fill in the following questionnaire**. Note that only questionnaires associated with the **Work Orders** module are displayed in this drop-down list. Refer to the **Questionnaires** section later in the documentation for more information.

Tip: If you wish, you can automatically send an email to the customer with the work order number that he has submitted via the portal. To do so, you must configure the sending of an email notification as previously described in the section **Notifications related to work orders**.

### When a customer consults a work order

If you allow customers to consult the list of their work orders or if you allow them to consult a work order using a unique URL address (no password required in such cases), this is the section where you can decide which information in the work order you will allow them to see.

Simply check the desired options. These changes will immediately take effect after being saved by clicking on the **Save** button.

Tip: For more information about consulting a work order using a unique URL address, please see the **Display URL** subsection in the **Work orders** section, earlier in the documentation.

### When a customer consults their banks of hours

As in the previous section, if you allow your customers to consult their banks of hours, this is where you can determine which information about their banks of hours they will be able to see.

## Knowledge base

A section named the Knowledge Base is also included in the application. This section is particularly useful for saving information in the form of articles that your technicians can consult if needed while performing their functions. This section can also be used, for example, to save information such as procedures that you can send to your customers.

To manage the articles in your knowledge base, select the **Knowledge Base** tab. In this section, you will obtain the list of articles. Simply click on the **Add a new article** button or click on the article's title to go to its file.

When you add an article, you must enter at least a title. The title of the article must be unique; there cannot be two articles with the same title. You can also enter a code for the article. This field is optional but, if you enter a code, the code must also be unique; there cannot be two articles with the same code.

You must then specify the date of the article, as well as its category. Categorizing articles is not mandatory. Article categories are simply another way to group them. For example, from the list of articles, you can filter them based on one or several categories so that only those categories appear on the screen. When printing a report that displays the list of articles, you can also specify that the report should only print articles belonging to certain categories.

Tip: Use the **Plus**, **Pencil**, and **Trash can** buttons located to the right of the **Category** dropdown list to manage this information.

The other fields are optional and available for information purposes only.

### User defined fields

As in most of the application's other modules, it is possible to add additional fields that allow you to store information that is specific to your company. Please see the section on **User defined fields** later in the documentation for more information on how to add additional fields.

### Documents

It is possible to attach documents to each of your articles. Simply click on the button **Add a document** to attach a document, or click on the **Trash can** button to the left of the document in the list to delete it.

### Print

It is possible to print articles. Go to its file and then click on the **Print** button. Select the desired model form from the **Form** dropdown list. Then select the output format (normally a PDF) from the **Format** dropdown list and click on **Print**. The application will generate the file and send it to your internet browser so that you can view it. Some internet browsers propose downloading the file before being able to view it.

### Questionnaires

As in most of the application's other modules, it is possible to attach questionnaires to an article of the knowledge base. Note that this section will only be visible if there is at least one active questionnaire assigned to the **Knowledge base** module. Refer to the **Questionnaires** section later in the documentation for more information.

## Reports

As seen previously in the documentation, when you access a file for a work order, a customer, a piece of equipment, an article, or any other file in the NewWaySERVICE modules, you can normally click on the **Print** button to print the file in question, or a report related to the file. In addition to being able to print these forms and reports, other reports are also available in the application.

### Classic Reports

The **Classic Reports** option contains numerous reports that are ready to be used. The main advantage of these reports is that they are easy to use and they are nicely presented. For example, it is easy to run one of these reports and then send it as an attachment by email to a coworker or customer.

To access this option, select the option **Reports and data export | Classic Reports** under the **More** tab. Then click on the report that you would like to run.

When you run these reports, you can choose from any of the following formats: PDF (Adobe Acrobat), XLS (Excel), XML, CSV, HTML, DOCX (MS Word), ODS (Open Document – Spreadsheet), ODT (Open Document - Word processing), TXT and RTF.

Tip: For a user to have the right to run a report, he or she must have received the right beforehand in the **Security** section of the technician's file in the **Quick Reports/Exports** subsection.

Tip: Contrary to reports in the **Quick Reports/Exports** option, these reports cannot be personalized directly by the user. However, we can create personalized reports for your company, depending on your needs. In

effect, this is a service that we offer, for a fee. Please contact us for more information.

## Quick Reports/Exports

NewWaySERVICE includes a powerful reports generator that allows you to extract the exact information you need, in the format in which you need it. In addition to offering classic reports (reports with a certain number of fixed columns or a fixed sorting order that you cannot normally change. See the section on **Classic Reports** above.), NewWaySERVICE offers the possibility to personalize quick reports/exports with a few clicks of the mouse and to save them for later use. By saving your personalized report, you avoid having to personalize your reports every time you wish to run them.

Tip: Once you've personalized and saved a report, you can share it with other users by simply checking the box **Share this report with other users**.

An example is worth a thousand words. To access this option, select the section **Reports and data export | Quick Reports/Exports** under the **More** tab.

This option is divided into seven simple steps.

### **Step 1 - Select a report template**

NewWaySERVICE provides several report templates. In this step, you must select a report from the dropdown list that best corresponds to the type of information you wish to obtain. To help you, the dropdown list is divided into sections.

For example, if you wish to obtain the list of technicians, you can select the report named **List of technicians** in the **Other Reports** section. For a report that lists your work orders, you must select a report in the section **Work order reports**. You may need several tries in the beginning to familiarize yourself with the templates. For the purposes of our example, select the report named **List of work orders** in the **Work order reports** section.

Tip: We can create new customized report/data export templates according to your company's needs. In effect, this is a service that we offer, for a fee. Please contact us for more information.

### **Step 2 - Select the columns to be included in the report**

Once the report template has been selected, the columns available for the template are displayed in the **Available columns** section. The columns that will be displayed in your report are displayed in the **Selected columns** section. Double-click on the description of a column to add or remove it from the list of selected columns or select the description of a column and click on the left or right arrow to add or remove the columns from the list of selected columns. To the right of the **Selected columns** section, use the up and down arrows to determine the order of the columns in your report.

Lastly, for each of the columns selected, you can specify in the section on the right (**Column options** section) if you would like to display a total for the column. Depending on the type of column, the choices available may be **None**, **Sum**, **Count**, and **Average**.

For the purposes of our example, add only the following columns to the **Selected columns** section: **Customer: Name**, **Work order: Number**, then **Work order: Total** (place the columns in this order) and then for the column **Work order: Total**, select the **Sum** option in the **Column options** section.

### **Step 3 - Select data sort order**

Once you've determined the list of columns that you would like to display in the report in step 2, you must now specify the sort order for the data in your report. For example, if you would like the work orders for the same customer to be displayed together, you must specify if you would like the data to be sorted according

to the **Customer** column: **Name**, and then according to the **Work order** column: **Number**. Your work orders will then be displayed according to customer (alphabetical order according to the customer name) and then according to the work order number.

The columns that you have added to the **Selected columns** section in step 2 will automatically be found in the **Selected columns** section in step 3. To specify the sort order, you must simply add the columns to the section **Sort by following columns** and then specify the order (which determines the sort order) using the up and down arrows. In this case, the column **Customer: Name** must be positioned first in the list, followed by the column **Work order: Number**. Leave the column **Work order: Total** in the **Selected columns** section since, in our example, we do not wish to sort the columns according to the work order total.

#### **Step 4 - Specify criteria to filter the results**

Criteria allow you to filter the data to be displayed. By default, if you do not specify any criteria, all of the data in the report will be displayed. In some cases, this may be what you want, but in other cases you will receive too much data.

For example, if you ask for the list of work orders and you have been using NewWaySERVICE for 15 years, you may have several thousands or even millions of records to display. To limit the amount of data to be displayed, you can, for example, add a criterion for the date of the work order so that only data for a certain period will be displayed.

For our example, we will add a criterion for the date of the work order as well as the customer. We will therefore be able to specify for which period and which customer we would like to display the list of work orders. Please remove all of the columns in the **Selected columns** sections and then only add the criteria **Work order: Date** and **Customer** in this section.

Then select the criterion **Work order: Date** and, in the section on the right, select the option **Between**, from the **Operator** dropdown list. Then, just below, click on the first date to select the start and end dates for the desired period. In our example, to be certain that work orders will be displayed in the report, the period could be the previous month, so you must enter the corresponding dates.

Then, select the **Customer** criterion by clicking on it, then in the section on the right, under **Specify the value for this criterion**, select **Only selected ones below**. Then, just below in the search box, start entering the first letters of the name of one of your customers. The application will display the list of customers that correspond to the characters you have entered. Select the customer from the list. Repeat the operation if you wish to obtain the list of work orders for multiple customers.

Tip: For the purposes of our example, since we do not know which customer you selected, to be certain that at least one work order displays in the report, select the **All** option from the section **Specify the value for this criterion**. At the end of this example, you can re-request the report by selecting the option **Only selected ones below** to test the report while filtering the data for a specific customer.

#### **Step 5 - Additional report parameters (Optional)**

As its name suggests, the **Skip detail** option allows you to display only the subtotals and the grand total of a report. For example, if you have a report that displays the list of work orders and you have asked for a subtotal per customer, by checking this option, the work orders will not be displayed. Only the subtotal for each customer will be displayed. This is practical when you do not need to see the transaction details of a report, but you would like to know, for example, the total per customer.

#### **Step 6 - Run report**

Now that you have finished personalizing your report (you could also say you have “configured” your report), you can run it. Just before, you can determine the report's output format. If you would like to consult the information on-screen only, you can select the **.Html (Hyper Text Markup Language)** output format.

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However, if you wish to manipulate the data in the report or send the report via email, it is more practical to select the **.xls (Excel)** or **.ods (Open Document Spreadsheet)** output format. Once you've selected the output format, click on the **Run** button to run your report. Once the report has been generated, click on the **Open** button to consult the report directly or **Download** to save the report to your computer.

### **Step 7 - Save your report parameters for the next time (Optional)**

As indicated above, once you have personalized your report, you can save your settings so that you do not have to go through the procedure the next time you would like to run the same report. To save your report, simply click the **Save** button and then give a name to your new report. Once saved, the report will display in the dropdown list (in step 1) in the **My templates** section at the very top of the list.

By default, you are the only user who can see the reports you have personalized. If you would like other users to be able to see them, simply check the box **Share this report with other users**.

Tip: For a user to have the right to run a report, he or she must have received the right beforehand in the **Security** section of the technician's information file in the **Quick Reports/Exports** subsection.

In addition, in order for a user to be able to run a shared report, he or she must have the right to run the original report that was used to create the shared report. For example, John has created the report **List of work orders - John's version**, using the **List of work orders** report. He has shared his report. In order for Jeanne to be able to view John's report, she must have the rights to run the **List of work orders** report since John's report was created based on that report.

Tip: If you would like to access data from NewWaySERVICE in a more direct manner for reading and writing, an API (Application Programming Interface) is included with the application. Please see the **API (Application Programming Interface)** document, available in the **Help and support** section in NewWaySERVICE to find out how to use it.

## Data export

Tip: This option was replaced by the option Quick Reports/Exports. It is now easier and more user-friendly to use the Quick Reports/ Exports option than this option to export data.

Most of the application's data can be exported into files. This is possible by going to **Reports and data export | Data export**, available in the **More** tab.

In this option, check the data (modules) that you would like to export, select the desired file format, and click on the button **Export data**. The application will generate the files (one file per module) and will compress the files into a single file (zip) that you will be able to download.

Once the file has been downloaded to your computer, you will be able to decompress (unzip) them to access the files.

Tip: Select the file formats **.CSV** or **.TSV** if you would like to then import the files into a spreadsheet such as MS Excel. In effect, these file formats (especially the TSV format) import easily into spreadsheets.

Tip: If you would like to access data from NewWaySERVICE in a more direct manner for reading and writing, an API (Application Programming Interface) is included with the application. Please see the **API (Application Programming Interface)** document, available in the **Help and support** section in NewWaySERVICE to find out how to use it.

## User defined fields

Additional fields called **User defined fields** can be added in most of the NewWaySERVICE modules. User defined fields are used to enter and modify information that is specific to your company. You can then use the information entered in the user defined fields to, for example, search for information in the application or print specific information in reports.

Example: Your company employs three representatives and you would like to specify the representative who is responsible for each of your customers. You can therefore add a new user defined field in the **Customers** module named **Representative**. This user defined field could be a dropdown list and contain the following choices: **John Wood**, **Jeanne Fontaine** and **Paul Lambert**. When entering your customers, you will now have a new **Representative** field and all you must do is select the representative who is responsible for the customer.

You can add as many user defined fields as you wish in the following modules: Customers, Equipment types, Equipment, Parts, Suppliers, Purchase orders, Technicians, Work orders, Work orders/Equipment types, Work orders/Work performed and Knowledge base.

The types of user defined fields that you can add are Character string, Integer number, Decimal number, Currency, Text, Date, Time, Date and time, Dropdown list, Radio buttons, Check box, Duration, Hyperlink (URL) and Signature.

A Character String user defined field can contain a maximum of 50 characters while a Text field can contain an unlimited number of lines of text. Decimal Number and Currency fields are almost identical, with the exception that Currency fields will also display the currency symbol that you have selected in the **Application configuration** settings. These two field types can accept up to 4 decimals after the period.

The Dropdown List and Radio buttons fields function in the same manner. These two field types allow you to define a list of predetermined choices that the user must simply select when entering information in this type of field. The only difference is that Radio Buttons fields display all the values on the screen whereas a Dropdown List field only displays the list of values when the user clicks on the dropdown list to display the choices. If you have multiple choices to offer the user (for example, more than 5 or 6), a dropdown list field is probably preferable since it takes up less room on the screen.

A Duration field allows you to enter a duration in an hours:minutes form, whereas a Hyperlink (URL) field allows you to enter a URL, for example, a website address. When this type of field is displayed on the screen, the value that is entered (for example, a website address) becomes clickable. This is practical when you would like to quickly access a website.

Lastly, a Signature type field is also available. You can already capture your customer's signature directly in a work order (see **Customer Signature** section), however, if for example you need to capture additional signatures, for example at each visit, in case a work order spans several visits, then the Signature type user defined field is exactly what you need. When capturing the signature, the date and time are also saved.

User defined fields are always displayed in the **User defined fields** section, such as in a customer's file or an equipment file.

### How to add a user defined field in a module

To go to this section, click on the **More** tab and then select the menu **Configuration | User defined fields**. Here you will find a list of the user defined fields that you have defined.

Simply click on the **New user defined field** button to add a new field or click on the description of the user defined field in the list to modify it.

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When you add a new user defined field, you must begin by selecting the module where you would like to add the new field, for example, the **Customers** module, if we refer to our previous example.

Tip: Once added, the user defined field module can no longer be modified. For example, if you make an error, you must first delete your user defined field and then create a new one, this time selecting the correct module.

Then enter the description for the user defined field. For example: **Representative** if we refer to our previous example.

Next select the type of user defined field. For the purposes of our example, select **Dropdown List**. (See the list above for the user defined field types available.)

Tip: Once added, the user defined field type can no longer be modified. For example, if you make an error, you must first delete your user defined field and then create a new one, this time selecting the correct field type.

The field position allows you to enter the position in which this user defined field should be displayed on the screen. This is only important if you have at least two user defined fields in the same module. You can enter any integer value in this field. For example, a user defined field whose position is 1 will display before a user defined field whose position is 5.

If you have selected the **Dropdown List** or **Radio Buttons** field type, the **List of Values** field will appear and you must determine the predefined list of values that your field will offer the user. For the purposes of this example, enter **John Wood** on the first line, **Jeanne Fontaine** on the second line, and **Paul Lambert** on the third line. Each value must be entered on a different line.

Tip: Give it some thought and think about how to enter each value correctly since you will not be able to completely change them once users have begun selecting the values in the application. If you do so, the former values that have already been selected in the application (such as in the customer information section) will not be automatically updated. However, you can change the order of values in the list under the condition that you do not change the spelling.

Next specify the default value that you would like to appear in your user defined field. This is only used when you create a new entry in a module, such as a new customer. In our example, if you select John Wood in the dropdown list, when you create a new customer, John Wood will be selected by default as the representative.

Skip **Link to** for the moment because we will see it in greater detail later.

Check the box **Display in grid** if you want to display this user defined field in the grid on the screen. This option is available for all modules except for modules Work orders / Equipment types and Work orders / Work performed.

Check the box **Display in filter** if you want to be able to filter data on screen using to this field. This option is available only for user defined fields of type **Dropdown List**, **Radio Button** and **Checkbox** for all modules except for modules Work orders / Equipment types and Work orders / Work performed.

About the option **Print this user defined field on paper forms**, it is used to print forms such as printing a work order, a purchase order or a customer's file, for example.

Check the box **Display in limited view** if you want that your technicians be also able to see this information from the limited view on their smartphone. This option is only available for the Work orders, Work orders / Equipment types and Work orders / Work performed modules.

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Finally, check the box **Can edit from Limited view** if you want that your technicians be also able to edit this information from the limited view on their smartphone. This option is only available for the Work orders / Work performed module.

Tip: When adding a user defined field, if you select the modules **Work orders**, **Work orders/Equipment type**, or **Work orders/Work performed**, an additional checkbox with the option **Display in Limited view** will be displayed. This allows you to decide if the technicians that access the Limited view can also see this field when consulting work orders.

If the module selected is **Work orders/Work performed**, another checkbox with the option **Can Edit in Limited view** will also be displayed. In such cases, you can decide whether or not the technician can modify this field from the Limited view.

Now click on the **Save** button to create your new user defined field. Once added, this new field becomes available immediately in the module in which you created it. In our example, since we added the field in the **Customers** module, if you go to the **Customers** tab and you modify any existing customer, you will see a new **Representative** field with a **dropdown list** in the **User defined fields** section.

Tip: When you delete a user defined field, all of the information that was entered in the field is deleted at the same time and it is not possible to recover it.

### Linking one user defined field to another

NewWaySERVICE offers the possibility to link one user defined field to another.

Let's take the example of the representatives described previously. Even if a representative is assigned to each of your customers, you may want to assign another representative for a specific piece of equipment instead of the representative who is normally assigned to the customer. You can therefore add a new user defined field in the **Equipment** module which contains the same list of representatives as the **Customers** module. This solution would work perfectly, but when you wish to add a new representative to your list, you must first modify the Representative user defined field in the **Customers** module as well as the **Representatives** user defined field in the **Equipment** module. You must make the correction in both places.

The **Link to** option allows you to add a user defined field in a module that uses the settings for another user defined field in another module. This avoids having to define the same thing twice.

For example, with reference to the previous example (Representatives user defined field), when you create a second Representatives user defined field, this time for the **Equipment** module, instead of another list of values (list of representatives), from the **Link to** dropdown list, you must simply specify in your user defined field to link the Representatives user defined field in the **Customers** module. This function has two undeniable advantages.

First, only the list of representatives in the Representatives user defined field in the customer module must be maintained since the Representative field defined in the **Equipment** module will directly refer to the information in the Representatives user defined field in the **Customers** module.

Second, with reference to this example, when adding a new piece of equipment, by selecting a customer for the equipment, the customer's representative will be automatically selected in the equipment's Representative user defined field. Simply put, the representative that will be automatically selected for the equipment will be the representative that is selected in the customer's file.

To link one user defined field to another, a few conditions must be respected. First, a user defined field must be linked to a user defined field of the same type (ex: a dropdown list must be linked to another dropdown list field). Next, only the user defined fields for certain modules may be linked to the user defined fields in other modules. These include:

A user defined field in the **Equipment** module can only be linked to a user defined field in the **Customers** or **Equipment types** module.

A user defined field in the **Work orders** module can only be linked to a user defined field in the **Technicians, Customers, Equipment types, or Equipment** modules.

A user defined field in the **Work orders/Equipment types** module can only be linked to a user defined field in the **Technicians, Customers, Equipment types, or Equipment** modules.

A user defined field in the **Work orders/Work performed** module can only be linked to a user defined field in the **Technicians, Customers, Equipment types, Equipment, Work orders, or Work orders/Equipment types** modules.

A user defined field in the **Quotes** module can only be linked to a user defined field in the **Technicians, Customers, Equipment types, or Equipment** modules.

A user defined field in the **Quotes/Equipment types** module can only be linked to a user defined field in the **Technicians, Customers, Equipment types, or Equipment** modules.

A user defined field in the **Quotes/Work to perform** module can only be linked to a user defined field in the **Customers, Equipment types, Equipment, Quotes, or Quotes/Equipment types** modules.

A user defined field in the **Purchase orders** module cannot be linked to a user defined field in the **Suppliers** module.

Lastly, user defined fields in the **Customers, Equipment types, Parts, Suppliers, Technicians** and **Knowledge base** modules cannot be linked to any other user defined fields.

Note that Signature type user defined fields can never be linked together.

## Questionnaires

NewWaySERVICE allows you to create your own questionnaires for your business. A questionnaire is simply a list of questions that you create and can then be answered by your technicians or customers.

A questionnaire could be simply a checklist, an inspection form, a control sheet, a test log, in short any kind of information in the form of questions and answers. Once the questionnaire is created, it can be attached to a work order, quote, equipment, customer, in short, questionnaires can be attached to practically any kind of information in the software.

For example, for a quarterly preventive maintenance of a particular type of equipment, you could create a questionnaire with specific questions for that type of equipment and the technician could simply fill out and attach this questionnaire to the work order when servicing. For an inspection tour, you could create a questionnaire specific to your type of inspection or for a service request received via the NewWaySERVICE customer portal web page, you could create a questionnaire with specific questions to ask to your customer that they would be required to answer before submitting their request.

Each questionnaire you create can contain an unlimited number of questions and you can determine the answer type for each of its questions. Answer types available are Character string, Integer number, Decimal number, Currency, Text, Date, Time, Date and time, Dropdown list, Radio buttons, Check box, Duration and Signature. The Signature answer type allows you to capture the technician's or customer's signature and save it as an image format. The date and time at the time of signature are also saved.

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A Character string answer type can contain a maximum of 50 characters while a Text answer type can contain an unlimited number of lines of text. Decimal and Currency answer types are almost identical, except that Currency will additionally display the currency you specified in the **Application Configuration** option. Both answer types can accept up to 4 decimal places after the point.

The Dropdown List and Radio buttons answer types work in the same manner. These two answer types allow you to define a list of predetermined choices that the user can select. The only difference is that Radio Buttons fields display all the values on the screen whereas a Dropdown List field only displays the list of values when the user clicks on the dropdown list. If you have multiple choices to offer the user (for example, more than 5 or 6), a dropdown list field is probably preferable since it takes up less room on the screen.

Lastly, a Duration answer type allows you to enter a duration in an hours:minutes form.

To manage your questionnaires, select the menu **Other options | Questionnaires** available from the **More** tab. Simply click the **New questionnaire** button to create a new questionnaire or click on the name of a questionnaire in the list to edit it.

When adding a questionnaire, you must enter a description. This description must be unique. There cannot be two questionnaires with the same description. You must then specify in which module(s) this questionnaire can be attached. For example, if you are creating a questionnaire that is a workplace inspection sheet to be completed before performing the work order, check the **Work Orders** module. Note that a questionnaire must be associated with at least one module.

Tip: As soon as there is at least one active questionnaire associated with a module, the **Questionnaires** section will automatically appear in that module. For example, if you create a **Workplace Inspection Sheet** questionnaire and assign it to the **Work Orders** module, then if you go to any work order, you will see a new **Questionnaires** section at the bottom of the work order that will allow you to attach the **Workplace Inspection Sheet** questionnaire or any other questionnaire associated with the **Work Orders** module.

Tip: If a questionnaire is used somewhere in the software and you cannot delete it, simply set its status to **Inactive**. It will no longer be available when a user attaches a questionnaire to an item in the software.

You must then add questions to your questionnaire by clicking on the **Add question** button. You can add as many questions as you want. For each question, specify the type of answer you want to obtain.

If you selected the Dropdown list or Radio button answer type, the **List of values** box will be displayed and you will need to enter the list of values (answer choices) available for this question. Note that each value must be entered on a separate line.

Tip: Give it some thought and think about how to enter each value correctly since you will not be able to completely change them once users have begun selecting the values in the application. If you do so, the former values that have already been selected in the application will not be automatically updated. However, you can change the order of values in the list under the condition that you do not change the spelling.

Then please specify the default value you would like to appear in your answer.

Finally, if necessary, you can check the box **An answer must be entered or selected**. This will force the user to enter or select an answer for this question when he or she completes the questionnaire.

Tip: To change the order of the questions, click on the small square in the top center of the question box and drag the box up or down (Drag and Drop).

Finally, click on the **Preview / Test questionnaire** button to see the final result of your questionnaire or to test it. Click on the **Save** button to save your questionnaire.

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Tip: To create a new questionnaire from an existing one and avoid recreating each question manually, simply click on the **Duplicate** button on the left side of the description.

## Attach a questionnaire

Once your questionnaire is created, you or your users can start using it. For example, if you have created a questionnaire that can be attached to work orders, if you navigate to a work order, you will see a **Questionnaires** section at the bottom of the work order. Simply click on the **Attach a questionnaire to this work order** button, select the desired questionnaire from the drop-down list and click **Ok**. Answer **Yes** to the question **Do you want to fill in the questionnaire now?** if you want to fill in the questionnaire immediately or **No** if you do not. At any time you can return to view or fill in a questionnaire by clicking on the **View / Fill in** link to the right of the previously attached questionnaire.

## Sync with other software

### QuickBooks

You can synchronize data with the QuickBooks application (the online version of QuickBooks) by selecting the **Sync with | QuickBooks** menu available from the **More** tab.

From this option, begin by clicking the **Connect to QuickBooks** button to be redirected to the QuickBooks website and connect to it. Once connected to QuickBooks, select the company you want to connect to (if you have more than one) and click on the **Connect** button to allow NewWaySERVICE to access your QuickBooks data. You will then be redirected to the NewWaySERVICE website in the data synchronization page with QuickBooks.

This page allows you to synchronize the list of your customers, suppliers, parts and quantities in stock. You can also transfer work orders to invoices into QuickBooks.

Of course, it is not mandatory to synchronize all of these modules. You can choose only what you want to synchronize and the synchronization of each module can be configured according to your needs. Click the **Synch now** button at the bottom of the page to start synchronization.

You can access back this option as needed each time you want to synchronize your data again. All the settings you specified at last synchronization will be selected by default.

Finally, click the **Disconnect** button to log out of your QuickBooks account.

## Tips and practical advice

### Entering negative numbers and durations

To enter a negative number or duration, simply enter the - (minus) character in front of the entered value.

If you are entering a number or a duration using a mobile device or tablet, in some cases the on-screen keyboard may not offer the - (minus) character. In such a case, you can substitute the character - by entering two periods in a row (or two commas in a row) and the application will understand that you want to

specify the character -. For example, to enter the decimal value **-2.35**, you could either enter **..2.35** or **„2.35** or **..2,35** or **„,2,35**. This also applies to entering negative durations.

## Entering durations

There are two ways to enter the duration: either in hours:minutes or in decimal format. For example, to enter **2h30**, you can either enter **2:30** or **2.5** or **2,5**. When entering the duration in decimal format, the application automatically converts the decimal number (ex: **2.5**) into hours:minutes, which would give **2h30**, in this case. The conversion occurs when you leave the cell (for example, when you click elsewhere). You can also choose to enter a whole number (ex: **2** to specify **2:00h**) or even a fraction without a whole number. For example, fifteen minutes may be entered in any of the following ways: **.25** or **,25** or **:15**.

If you are entering the duration using a mobile device or tablet, in some cases the on-screen keyboard may not offer the character **:** (colon). In such a case, to still be able to enter the duration in hours:minutes format, you can substitute the character **:** by entering two periods in a row (or two commas in a row) and the application will understand that you want to specify the character **:**. For example, to enter **2h30**, you could either enter **2..30** or **2,,30**.

**Tip:** Entering a negative duration using a keyboard that also does not offer the character **-** (minus) could be done as follows: for example, to enter **-2h30** you could enter **..2..30** or **..2,,30** or **„,2..30** or **„,2,,30**. See the **Entering negative numbers and durations** section above for more information.

## Searching

In most of the application's modules (Customers, Work orders, etc.), you can search and quickly go to a specific record. For example, select the **Customers** tab to display the list of customers. You will notice that there is a search box in the upper left corner. This search box has two search modes: Quick Search and Detailed Search.

### Quick Search

When you enter text in the search box, the quick search mode is automatically activated. If the text that you have entered corresponds to a name or valid customer code, the application will display the customer(s) found in a list under the search box and you will be able to select one of the customers proposed by the application to take you directly to the customer. To ensure that the search goes quickly, the search is only conducted in a limited number of fields, in this case, the customer name and code.

### Detailed Search

Contrary to the quick search, the detailed search searches all of the fields in the customer's file (if we continue with the previous example). To activate the detailed search, enter one or more keywords and click the **Search** button. All of the customers containing all of the keywords entered will automatically be displayed in a list.

You will notice that this search goes rather quickly even though the application must search all of the fields in the customer's file. This is made possible by a special search algorithm (exclusive to OroLogic). In simple terms, every time information is entered into the application, all of the words entered by the user are automatically indexed in a precise manner in a database. Then, when a user conducts a search, the application uses the special algorithm to quickly and precisely locate the files where the words have already been entered and then proposes the files (customers, in this case) to the user.

For example, in the customers list, if you search for the words **urban park development**, all of the projects containing these three words are displayed on-screen. A customer that only contains two of the three words entered will not be displayed.

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Note that only words with 3 or more characters are indexed. Words with less than 3 characters are ignored. In addition, words that contain special characters, such as **!@#\$\$%^&\*()+ or =**, are divided into several words. For example, if you have entered a number such as **ABCD-1234** in a customer's file, the dash (-) character will be ignored and two separate words will be indexed in the database (**ABCD** and **1234**). If you search for ABCD-1234, this is equivalent to searching for the two words, ABCD and 1234, separated by a space.

For performance purposes, the search is always conducted from the beginning of the word which means that, if you search for the word **devel**, customers containing the words **development**, **develop** and **developments** will be displayed in the search results. However, a customer that contains the word **redevelopment** will not appear because the word does not begin by **devel**.

Lastly, note that the search is not case sensitive which means that, if you search for the word **devel**, projects containing the words **development**, **DEVELOP** and **DeVeLoPmEnT** will be displayed in the search results.

The same principle applies for most accented characters. If you search for the word **café**, customers that contain the words **café**, **cafe** or even **cafè** will be displayed. For example, in the case of the letter "e," the characters é, è, ê, etc. are all considered unaccented letters.

Since NewWaySERVICE is compatible with Unicode, the search will function just as well with the text entered using any alphabet, whether the Latin alphabet (English, French Spanish, etc.), or the Greek or Chinese alphabets, for example.

## Filter

In most of the application's modules (Customers, Equipment, Work orders, etc.), you can filter the data displayed on screen. Simply click on the **Filter** box and select the filter to be applied. You can apply several filters simultaneously. For example, in the **Customers** module, you can filter the list of customers in order to display only active customers belonging to a certain category.

## Sort order

NewWaySERVICE allows you to change the data sort order on screen at any time in most of the application's modules. For example, if you go to the **Customers** tab, you will notice that the customers are displayed alphabetically by default, according to the customer's name. If you would like to list the customers by their customer codes, click on the **Code** header and the list will automatically display your customers according to their codes (from smallest to largest). Click on the **Code** header again and the list will be displayed by code but, this time, from the largest to the smallest. It is therefore possible to sort data in most of the columns and in most of the modules.

## Terminology

Some of the terms used in the application can be changed to adapt to your organization's terminology. This is an extremely powerful option and the application was developed with this in mind.

For example, if you do not like the term "work order," you can change it to "service request," "request," or any other term of your choice. When you change a term, the term is immediately changed everywhere in the application and in reports. You can change the terms at any time. The terms that you can change are: **Work order**, **Quote**, **Technician**, **Customer**, **Equipment**, and **Parts**—the most important terms in the application.

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To access this option, click on the **More** tab, select the menu **Configuration | Terminology** and then select the language of your choice. In effect, since NewWaySERVICE is multilingual, you can adapt the terms in the different languages in which you plan to use the application.

Tip: If, for example, you change the term "equipment" to "boat," the term "equipment type" will also be automatically changed to "boat type."

## Application Log

NewWaySERVICE automatically logs certain actions performed by users, for example, when a work order is created, deleted or its status is changed. This also applies to quotes and purchase orders.

NewWaySERVICE also logs all emails sent manually by users or sent automatically by the application, such as appointment reminders or automated notifications related to work orders, equipment or banks of hours that you may have created. It is also possible to see, for each email sent, whether the email was successfully transmitted to the recipient(s) server. Additional information will also be logged in the event that the email could not be transmitted to the server correctly.

This option can be very useful for checking what really happened, for example, with a work order or a sent email.

To access this option, click the **More** tab then select menu **Other options | Application log**.

## Subscription to NewWaySERVICE

It is possible to use NewWaySERVICE for free for a 45-day trial period. There are no restrictions in the application during the trial period. You can therefore use NewWaySERVICE for as many technicians as you wish at no charge.

To continue using NewWaySERVICE after the 45-day trial period, you must subscribe for the desired number of technicians.

As previously mentioned in the documentation, in the **Technicians** section, you do not need a subscription for users who do not have the role of **Technician**. Access to the application for this type of user is free. You are only required to have a subscription for users who have the role of **Technician** (technicians to whom you would like to assign work orders). Please note, however, that you cannot have more users with the role of **Dispatcher** or **Administrative staff** than users with the role **Technician**. Consult the **Technicians** section earlier in the documentation for more information.

Tip: When a technician leaves your organization, simply set the technician's status to Inactive. The technician will no longer be able to access the application. In addition, you can keep a complete history (work orders, time worked, etc.) of this technician in the application. Since inactive users are not taken into consideration for subscriptions, you can add a new technician to replace the inactive technician without changing the number of technicians in your subscription.

When you have a subscription to NewWaySERVICE, you must subscribe for a period of 3, 6, 9, or 12 months. Thirty days before the end of the subscription, when you log in to the application, a message will appear notifying you that you must renew your subscription for a new term. This gives you a sufficient amount of time to complete your renewal. Once the subscription has been renewed, the new term will be added to the current term. You can therefore renew your subscription before it ends without losing a single day of your subscription. As you may have noticed, there are no automatic renewals. You must decide whether you would like to renew your subscription.

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To subscribe to NewWaySERVICE, to renew your subscription, or to adjust the number of technicians in your subscription, simply go to the option **Subscription Management** under the **More** tab and click on the button **Subscribe to NewWaySERVICE** or the button **Renew my subscription or change options** (depending on the case) and then simply follow the directions on the screen.

Tip: You do not need to wait until the end of your trial period to subscribe to NewWaySERVICE. When you subscribe, the term is added to your trial period. You will not, therefore, lose any days in your trial period.

Tip: You can add technicians to your subscription at any time for the duration of your subscription. In such cases, you must only pay pro rata for the new technicians for the rest of the term.

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## Help and Support

We are happy to provide you with free support for NewWaySERVICE. There are no additional service contract fees to pay when subscribing to NewWaySERVICE.

### **Request for information or technical support**

If you have any questions about the application, we are happy to provide you with support services as needed.

You can quickly view the most frequently asked questions by consulting the **Frequently Asked Questions** section, found in the **Help and support** section appearing under the **More** tab. If you cannot find a response to your question in this section, contact us by filling out the support request form also available in the **Help and support** option under the **More** tab. We will respond to your message as soon as possible. We are happy to provide assistance in both English and French.

### **24/7 Surveillance**

Please note that our systems are monitored 24 hours a day, 7 days a week. Surveillance is conducted using our own tools and simultaneously by a third party. When one of our systems is temporarily unavailable, our technicians are immediately notified and you do not need to fill out any requests to notify us. In such cases, you will only have to wait a few minutes (the amount of time it takes for our technicians to intervene) and then try again.

You can visit <http://status.NewWaySERVICE.com> at any time to see the status of our systems, as well as the server history.

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# Copyright

## **NewWaySERVICE**

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