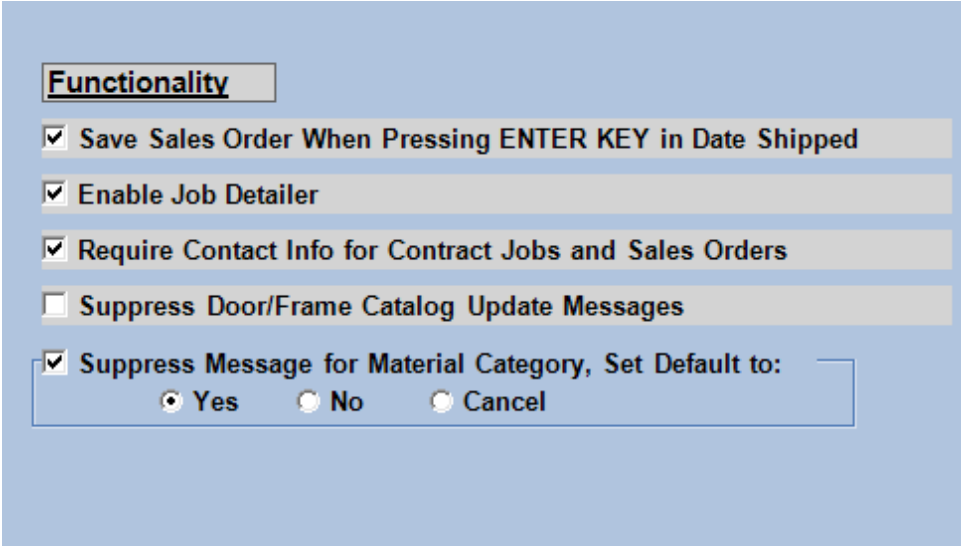


## Job Detailer

This feature allows an Admin user to set up users as Detailers giving them access to Contract Jobs or Contract Proposals they have been assigned to. The jobs not assigned to will be invisible to them. If you wish to use this feature every user that does not have Admin rights will not see any Contract Jobs or Contract Quotes until they have been assigned as Detailers to various jobs.

### How it works:

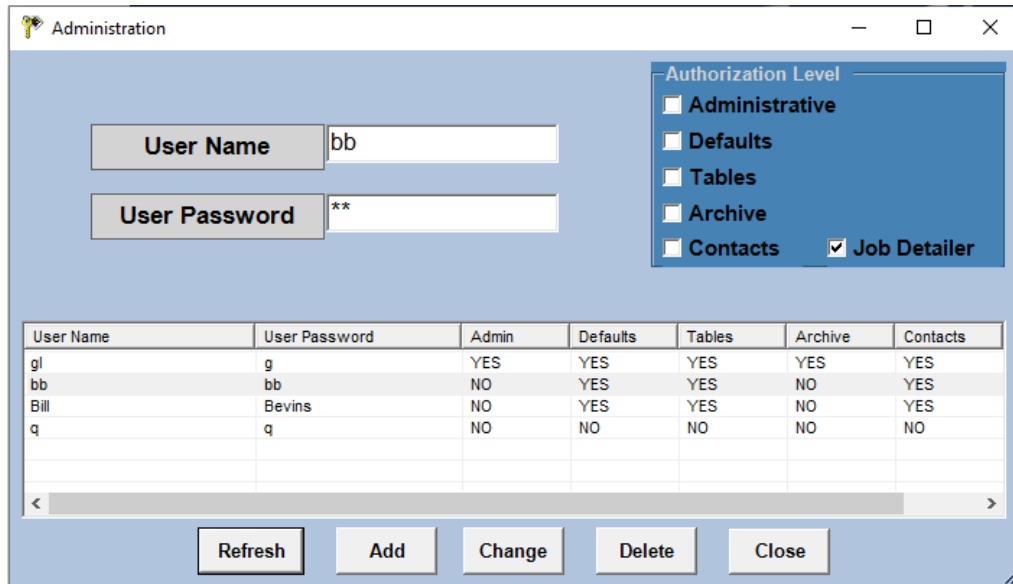
1. Launch Software for Hardware.
2. From the Logo screen click *File*.
3. Choose *Optional Settings*.
4. Select *Company*.
5. The Company Options screen appears.



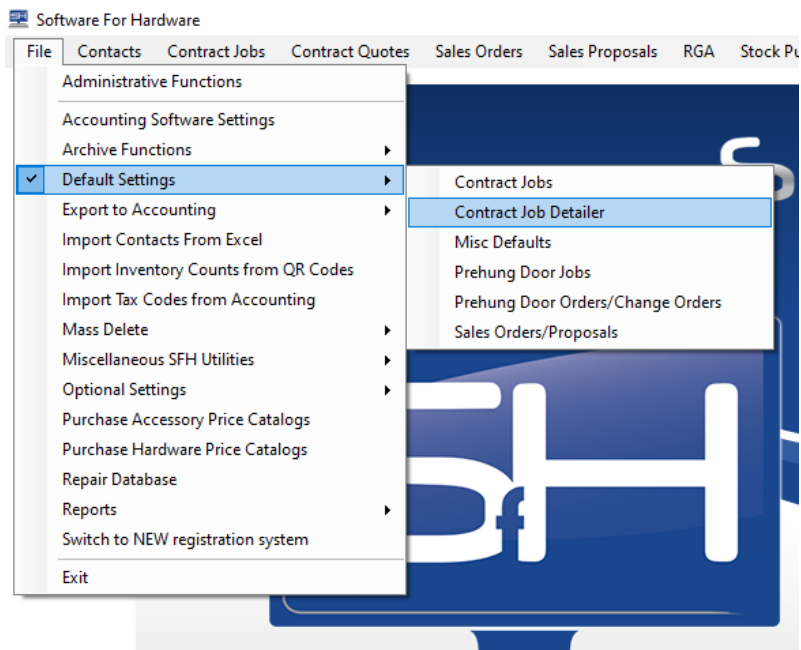
The screenshot shows a 'Functionality' section with several settings. The 'Enable Job Detailer' checkbox is checked. Below it, there are three radio buttons for 'Set Default to:': 'Yes' (selected), 'No', and 'Cancel'.

Functionality
<input checked="" type="checkbox"/> Save Sales Order When Pressing ENTER KEY in Date Shipped
<input checked="" type="checkbox"/> Enable Job Detailer
<input checked="" type="checkbox"/> Require Contact Info for Contract Jobs and Sales Orders
<input type="checkbox"/> Suppress Door/Frame Catalog Update Messages
<input checked="" type="checkbox"/> Suppress Message for Material Category, Set Default to:
<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="radio"/> Cancel

6. There is a new checkbox in the *Functionality* section entitled *Enable Job Detailer*.
7. To enable just check the box and click *Save*.
8. Next you must add a Detailer account.
9. From the *Administration* form off the *File* menu add a user.
10. Check the *Job Detailer* box.
11. Check other boxes if you want this user to have additional rights.
  - a. You can also modify an existing user account to be a Job Detailer.
12. Please refer to the image at the top of the next page.



13. When finished adding or changing a Job Detailer account just click *Close* to exit.
14. Now, the first step is to assign Detailers to jobs and/or quotes.
15. From the Logo screen click *File*.
16. Click *Default Settings*.
17. On the fly out menu select *Contract Job Detailer*.



18. The following form appears listing all the Contract Jobs and Contract Quotes:

Job Detailer

Job #	Job Name	Status	Detailer
0000111122	Keyset Wizard Test	Quote	
000011AA	Import Test	Quote	
00001Test	00001 Test	Quote	
001Alum	Aluminum Test Job	Quote	
01000000	Grid Entry Import	Quote	
01Base	Basement	Quote	
0221584100	0-A Frame	Quote	
08012016	August 1 Quote	Quote	
0A0A0A001	Alpha Job	Quote	
0A0A0A111	Paired Test	Quote	
10-Pre	Prehung Height Test	Quote	
11147	Some sort of Test	Quote	
123456789	Gary Anchor Test	Quote	
123GL42	Gary Transom Test	Quote	
1956	Good Year	Quote	
1X	Test Bobrick Cutsheets	Quote	
221548	Another Brand New Job	Quote	
27GEN2014	Generic Job 27	Quote	
42LG321	More Gary Transom Test	Quote	
987654321	Paired Opening Test	Quote	
A393993	Brand New Job	Quote	
asfads	asfsfas	Quote	
GaryTest	Test Job for Search and Replace of Various Items	Quote	
GARYTEST01	Gary's Test Job	Quote	
GaryTest2	Gary's Test Job Number 2	Quote	
GL10101	Import	Quote	

Search:      Job#     Job Name     Status   

19. In the example above we are telling the grid to display jobs where status equals quote.

**The default will be all jobs and quotes regardless of status.**

20. To add a user as a Detailer to a job simply click the *Detailer* cell on the same line as the job you wish to assign.

21. A pop-up form will appear listing all users.

Job Name	Status	Detailer
Keyset Wizard Test	Quote	
Import Test	Quote	
00001 Test	Quote	
Aluminum Test		
Grid Entry Imp		
Basement		
0-A Frame		
August 1 Quo		
Alpha Job		
Paired Test		
Prehung Heig		
Some sort of		
Gary Anchor T		
Gary Transom		
Good Year		
Test Bobrick		
Another Bran		
Generic Job 2		
More Gary Tra		
Paired Openin		
Brand New Jo		
asfsfas		
Test Job for S		
Gary's Test Jo		
Gary's Test Job Number 2		

Detailer

ql

bb

Bill

22. Select the user you wish to assign as Detailer for this job by checking the box next to the user's name. Then click *Save*.
23. Conversely, to remove a Detailer from a job/quote, simply remove the check next to the Detailer's name.
24. Once defined, a Detailer can log into SFH and when they view the listing of Contract Jobs or Contract Quotes, only those jobs/quotes they are assigned to will appear in the grid.

List of Contract Quotes

Job Name	Job Number	Salesperson	Project Manager	Job Status	Contractor	Date Created	Date Approved
August 1 Quote	08012016	Bill Bevins		Quote	Blue Mountains Contractors and Builders	08/01/2016	

25. The above example shows the Contract Quote Detailer bb is assigned to and nothing else. **PLEASE NOTE – any user not set up as a Detailer, and, not containing Admin rights will see a blank grid.**

#### Assigning Detailers from within a Contract Job or Contract Quote:

1. You can also assign Detailers from within a Contract Job or Contract Quote. **Please Note – you must have Admin rights to assign Detailers from within a job/quote.**
2. Open a Contract Job or Contract Quote.
3. On the Project screen you will see the new *Detailer* field to the right.

The screenshot shows a software interface with a 'Detailer' dropdown menu set to 'bb'. Below it is a table with the following columns: Location 2, Int. / Ext., and Product Ty. The table contains two rows of data:

Location 2	Int. / Ext.	Product Ty
	I	Door/Frame
	E	Door/Frame

4. To assign a Detailer click the dropdown box and select a Detailer from the list. Click the *Save* button.
5. A Detailer can be removed from the current job/quote by either selecting another Detailer, or selecting the blank space in the dropdown and then clicking *Save*.

**Please Note** – For a *Job Detailer* account most of the Logo screen menus are disabled preventing the user entry.

