YOURADAR

Your Radar Mobile Workforce Management

KDI – Kobelt Development Inc.

Dispatcher & Admin Training Guide

Your Radar Dispatcher & Admin Training Guide

KDI
Est. 1987

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What is Your Radar & What Can It Do For Your Business?

1

Your Radar is a cloud-based, fully customizable workforce management software that improves the efficiency and profitability of small service businesses.

For many businesses, all business functions are completed within one fixed location. However, service providers need to get their employees to their customers' homes, buildings, and properties to resolve their issues. This division therefore requires a mobile workforce constantly out in the field servicing your valued customers wherever they reside.

Tailored Software

We recognize that every service business is different. Your Radar has countless feature options to choose from so that you get to decide the features that your business needs and those that you can do without.

Easy-to-Use

Your Radar was designer with its users in mind. We know that not all employees are teach-savvy, so our software is simple enough that all employees can quickly and effectively integrate it into their work days.
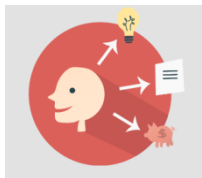
Combined Services

At KDI, we have an in-house team of technical software developers and network specialists who can help you in a variety of other technical areas. Whether you are looking to keep your data and network safe or make your business standout with unique, interactive website design, we are here to help.

WorkForce Monitoring

Your Radar's geo-location capabilities and dispatch algorithms will automatically schedule the closest qualified technician to the job to save travel time. Customers will receive an alert that their technician has been dispatched and will arrive shortly.
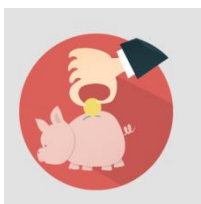
Great Value

Choose from three great monthly packages, or customize your own with the features that align best with your business. Get a pricing plan that fits within your businesses budget by only paying for the features you need.

Trusted Service

Your Radar is backed by KDI. With more than 25 years of experience in software development, network support, data maintenance and security, website design, and technology consulting, our are the industry experts you can depend on to get the job done.

Features

Dispatch

Geo-location

Route optimization

Mobile surveillance

Timecard

Record travel time and mileage

Check in when arrive at job site

Check out when job is complete

Timsheets

Use timecard to create invoices

Reduce paperwork

Increase efficiency

Jobsite Surveys

Provide onsite checklist

Liability against false accusations

Scheduling

Display vacations, days off, jobs

Self-schedule and prevent overbooking

Manage Contacts

Store client contact info

Add notes, display service history

Pricing & Plan Options

TEAM	AGENCY	CORPORATE
$95/month	$20/month per user	$15/month per user
Up to 4 users	5+ users	20+ users

How Will Your Employees Use Your Radar?

2

Saving time shouldn't be complicated. From implementation to use interaction, Your Radar is quick to access and easy to use.

One of the greatest concerns in software development is that software that promises to improve productivity may be too complicated and end up creating more work for its users. That's why we kept the end user in mind throughout the entire process of designing Your Radar to ensure that it was as simple and intuitive as possible. This training module will allow your field employees and technicians to master using Your Radar to make their (and your) jobs easier and more efficient.

Overview

The dashboard houses all of the Your Radar functions in one simple, easy to navigate layout. At the beginning of their days, employees will log into their account at https://kdi.yourradar.net/cismobile using their smart device.

First, technicians will open the "documents" icon to check into their vehicle for the day. In order to do so, they will select the first asset, which is a blank entry, from the drop-down menu and click "truck pick up". This will display the truck check in survey, which will be customized for each company. This survey will provide a checklist of essential items that should be in the vehicle, as well as information and that technicians need to begin their days.

Next, technicians will open the "jobs" icon to check their scheduled jobs for the and check in to their first one using the "timesheets" icon. The "trip" icon will then display the optimal route to their first client site based on their current location and traffic conditions. The client will receive an alert that their technician has been dispatched with an estimated arrival time. Should the technician wish to

contact the client prior to arriving at the site, they may do so within the "contacts" icon, where they will simply look up the client in question and contact them directly from Your Radar.

Upon arrival at their first job, the technician will log their mileage and update their status as arrived in the "timesheets" icon. Subsequently, they would review the client file under "contacts" for any information relevant to their job, such as notes made by other technicians, past service history, and customer preferences. Next, the technician would present the customer with a pre-generated quote for the service call. Should the client accept the quote, the technician would begin their service. This would display a pre-job survey designed by the contractor or owner, which the technician would review before beginning the service call.

Should the technician need to replace a part during their service call, they would simply open the "inventory" icon and search for the specific part they need. If they did not have the part in their van, they would return to the "trip" icon, where an optimal route to the nearest hardware store could be displayed. Upon purchasing the item, they would open the "expense" tab, where they would record the price, model number, and other relevant information for the part they purchased. Next, they would reopen the "timesheet" icon, adjust their mileage to reflect the trip to purchase the missing part, as well as add the part by clicking on the "parts" button, inputting the prompted information about the equipment serviced, and then adding the parts purchased or used using the second "parts" button.

Once the job is completed and the technician checks out of the job using the "timesheet" icon, a post-job survey would be displayed, where the technician would input the required information. After the survey has been completed, the technician would ensure that the job had been completed to the customer's satisfaction. If successful, an invoice would be generated using the data inputted in "expenses" and "timesheet". This invoice would be sent to the customer using their contact information stored in "contacts". Once the customer receives the invoice, the technician would process and record payment and update the job's status to complete using the "jobs" tab. The technician would then open their next job, check in, and generate their next optimal route.

How Will You Use Your Radar?

How can your assets be profitable when you can't find them?

For many businesses, nearly every job, task, and chore can be completed within one fixed location. However, for service providers, your customers don't have the ability to pick up their homes, buildings, or properties and bring them in for servicing. Instead, you need to get your employees to your customers and resolve their issues wherever they reside. This type of a mobile workforce is not only more difficult to track, but brings additional scheduling, tracking, and productivity issues.

Overview

At the beginning of each day, dispatchers and system administrators will log into their Your Radar accounts at https://kdi.yourradar.net using their smart device or computer. Once logged in, the first screen that will be displayed is the jobs screen. This screen shows all jobs that have been dispatched in Your Radar. The text of jobs that are completed is green, while those that are incomplete or in progress are grey. Jobs can be searched using any of the fields displayed, or can be found manually by scrolling through the job lists.

Typically, dispatchers would then open the schedule using the schedule button on the left of the navigation bar, where all of the jobs for the day would be displayed. When a service request has been received, dispatchers will either create a quote or a new job in Your Radar. To create a quote, click on the quotation button from the drop down job menu to display the quote screen. Here, you will see all quotes that have been completed, are ongoing, have been submitted, accepted, and rejected. Additionally, new quotes can be created using the blue "create quote" button at the top center of the screen.

To create the quote, select the type of job from the job type list, and then search the specific job from the piece work list to the right. Next, select any parts that the customer will likely require to complete the job. If the customer desires quotes for multiple jobs, use the "add new piece work" button to add subsequent jobs to the quote. If the client receives a discounted rate for their services, change the client level by selecting a different option from the drop down client level menu and click on the blue change client level button.

If there are any images that you would like to attach to the quote, such as photos of the equipment, location on the job site, or any pre-existing damage to the equipment or area, you can do so using the grey "choose file" button. When you are satisfied with your entry, click on the blue submit button.

This will display a form to fill in the client's information. Here, you will be prompted to fill in the client's information, assign a priority, status, and technician. The status will be listed under in the quote menu. Quotes marked as "ongoing" are incomplete and likely require further information. Quotes marked as "submitted" will appear in the Your Radar scheduler to be assigned a date and time for dispatch. Quotes marked as "completed" have been dispatched are awaiting customer approval. Quotes marked as "accepted" have been approved by the client and the technician assigned to the quote will have been dispatched and be conducting the service. Quotes marked as "rejected" have not been accepted by the customer, and the service will not be carried out by any technician.

If you would like to instead create a dispatch directly, return to the schedule using the left-most button in the navigation bar. In the schedule, locate the blue "add job" button in the function box on the middle left of the screen. This will prompt you to fill in the client's information, job type, priority, the sales person who has received the dispatch (yourself), the quote amount if applicable, number of technicians and hours needed to complete the job, and a tentative date on which to schedule the job. Once all of these fields have been filled, click on the grey "save" button to submit the dispatch.

Submitting the dispatch will create the job in Your Radar and allow you to assign it to a technician by dragging the job into the desired time for the desired technician. Once the job dispatch has been dragged onto the technician's daily schedule, the job will appear in their daily jobs screen in the technician interface of Your Radar. When the technician has completed the job, refresh the schedule using the grey "refresh page" button in the function box. Once the page is refreshed, any jobs that have been completed will change colors from green to grey.
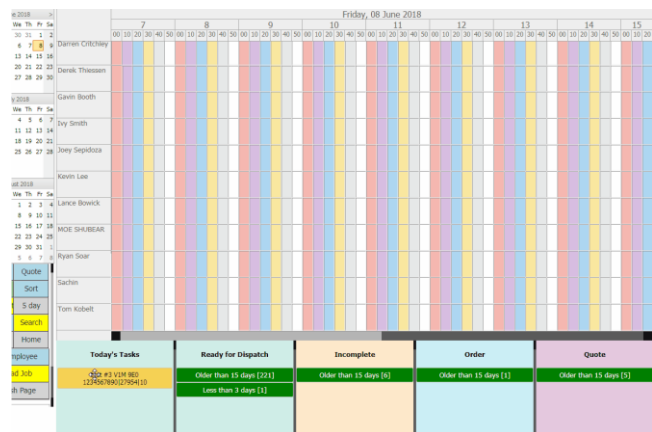
To view this GIF, double click on the image

Functions

There are 8 distinct sets of functions in the Your Radar administrative navigation bar. Each function has specific tasks that you will use to increase your efficiency and ensure that every job is done consistently and correctly to ensure maximum consumer satisfaction, and ultimately, retention. These functions will be described in detail with full run-throughs of their common uses.

Schedule

The schedule function houses the mass employee schedule where jobs and quotes can be assigned to technicians for dispatch. To access the schedule, click on the schedule button on the left side of the navigation bar. This will display the master schedule. Your employees' names will be displayed in the left column of the schedule, with the date and time of day displayed along the top to form a grid.

To change the day displayed, click on the desired day in the calendars on the top left of the screen. To view all of your employees, scroll up and down the master schedule. If you wish to display hours later in the day, scroll from left to right using the navigation bar at the bottom of the master calendar.

Jobs

There are three ways to create job dispatches in Your Radar. The first uses the schedule's "new job" button and allows dispatchers to schedule a tentative day and physically drag the dispatch into the desired technician and time slot for dispatch. This method was explained in further detail on page 7 of this manual.

Additionally, jobs can be added using the "add new job" function from the drop down job menu in the navigation bar. This method allows dispatchers to input more details into the dispatch, specifically selecting before and after questionnaires that will be displayed for technicians at the beginning and end of the job, assigning a job foreman, and type of incident. Creating this job dispatch by clicking the blue "add" button will add the job to the job list found on the system landing page rather than in the schedule. In order to create a job listing in the schedule using this method, you must ensure that you select the incident type as "work order/job" and that the

incident status selected is "work started". This will display the job in the schedule under the "Ready for Dispatch" bucket. This job can then be dragged into the desired technician row and time column.

The final method for creating new dispatches uses the "quotation" function in the drop-down jobs menu in the navigation bar. By clicking on the blue "create dispatch" button, a new job can be created. This will prompt you to assign the dispatch to a customer account and to a technician or field employee from the respective drop-down menus. When you are satisfied with your choices, click on the blue "create dispatch" button. This will create a dispatch with very little information in the schedule under the "quote" bucket. To add more information to this quotation dispatch, double click on the dispatch and input the missing information and then assign it to a technician by dragging and dropping.

To view previously entered jobs, simply locate them in the calendar or under the ready for dispatch column. To edit a previously entered job, click on the job entry. This will display and allow you to edit the information entered. Once you are satisfied with your changes, click the gray "save" button to update the job in the master schedule.

Reports

The report function in the schedule can be accessed by clicking on the green "report" button in the function box. This will prompt you to search the customer for whom you would like to generate an account report. Once you have selected the relevant customer, their account information will be displayed.

The report contains important information, including their service history, a total of the hours that have been scheduled for the customer, and specific information about each job concerning this customer account. To print

this page for your records, click on the large blue "print" button at the top of the screen below the search bar. Jobs with green titles have been completed successfully, while those in green are in progress or have been marked as incomplete.

Timesheets

Timesheets refer to lists of billable hours recorded by your employees. To generate timesheets for your workforce, you can use one of two methods. The first is found in the schedule page's function box. Clicking on the yellow "timesheet" button in the function box will display an employee movement report page. This page allows you to select an employee and a specific date or date range for which you would like to display their hours. (doesn't work – need data from Sachin maybe?)

The second method through which timesheet data may be generated is using the "timesheet report" function in the drop-down dashboard list in the navigation menu. Here, you will be prompted to select an employee and a period during which the data should be pulled from. An important caveat in this method is that you have the ability to display the data for ALL employees collectively. Additionally, this method allows you to export all timesheet data as an Excel spreadsheet. Doing so would allow a manager to easily and effectively extract payroll information for easy importation into a payroll or accounting system. In order to export timesheet data, click on the blue download as spreadsheet button at the bottom of the time report screen.

Adding Employees

To add new employees to Your Radar, two methods may be used. The first uses the blue "add employee" button found in the schedule function box. Clicking on this button would display a list of all users currently entered in the system. To add a new user, locate and click on the grey "add user/account representative/rates". This will display the add user page, where you will be required to input a unique username, a password, and information for display in the scheduler. The information found in the first table will be displayed in the master schedule

associated with this employee. Additionally, the option to add a custom signature can be used for when field employees and technicians use the in-app contact option to reach clients by email. The custom email signature that you input here will be automatically added to the end of their client communications sent from within the technician application. It is important to note that technicians cannot see this signature or choose whether or not to include it when they are composing client communications.

The second method for adding users is quite similar to the first; the only difference is that in order to navigate to the user list, the "user list" must be selected from within the "user configuration" settings in the settings drop-down menu found in the main navigation bar.

Display and Settings

There are a number of options to change the settings and displays in the master schedule. The function box, pictured on the right houses all of the functions that can be used in the schedule screen. The grey "5 day" button will display a schedule is a format optimized for printing of the jobs dispatched over the next 5-day period. The yellow "search" button will allow you to search for any quote, task, job, or order by account name or location. The grey "home" button can be used to return to the Your Radar dashboard at any time. The yellow "reload job" page will refresh the schedule to reflect the latest job updates. This is especially useful to ensure that jobs were marked as complete by technicians at the end of the day. The grey "refresh page" button will refresh the entire schedule, including jobs and quotes that have not been assigned to technicians. Finally, the grey "print" button can be used in accordance with the calendar and drop-down list of employees directly above it. By selecting a date and an employee, their schedule for that day will be generated in a format optimized for printing.

Click or tap and drag the boxes to reorder.

The schedule's display can be further customized using the built in settings found in the schedule function box. If you would like to change the order in which employees are displayed on the master schedule, simply click on the blue "sort" button found in the function box. By dragging the boxes up and down, the employee list found on the left-hand side of the schedule will be updated. This page updates automatically, so when you are satisfied with the list, you may close the browser tab to return to the schedule.

To change the colors representing each category of job statuses, click on the grey "status" button in the function box. This will take you to the schedule status menu. Here, you are able to review and change the color codes assigned to different job, quote, and purchase order status option. To edit the color code, click on the pen and paper icon to the right of the magnifying glass. To change the color, select a new color from the color drop down menu. If you would like to change the name of the job status, type in the updated name in the first editable field. Once you are satisfied with your changes, click on the blue "edit" button at the bottom of the screen.

			Key	Description	Color	View	Status
			1	Confirmation pending	#EDBB99	Non-mobile	Active
			2	Confirmed by client	#A3E4D7	Non-mobile	Active
			3	Waiting for parts	#F9E006	Non-mobile	Active
			4	Parts arrived	#FFFFFF	Non-mobile	Active
			5	Job Completed	#85F97A	Mobile	Active
			6	Job Not Ready	#EBDEF0	Non-mobile	Inactive
			7	Job Alert	Red	Non-mobile	
			8	Job ASAP	#F5B7B1	Non-mobile	Inactive
			9	Pink	#FF69B4	Non-mobile	Active
			10	Grey	#808080	Non-mobile	Active
			11	Job Ready	#85F97A	Non-mobile	Inactive
			12	Quote Sent	#F9B8F9	Non-mobile	Active
			13	Job Sold	#F9EF7A	Non-mobile	Active
			14	Call Backs	#FF8300	Mobile	Active
			15	Needs Attention!!	Bright Red	Non-mobile	Active
			16	Not Sold	Cyan	Non-mobile	Active
			17	Job Incomplete	#85F97A	Mobile	Active

You may now close this browser tab and return to the schedule. If any jobs are currently marked as the status that you have just changed, their status will be displayed in the updated color. To check that your changes have been uploaded if you do not have a job displaying the status, right click on a job entry and check that the status is displayed in the correct colored highlight.

To assign specific tags to jobs, click on the blue "property" button. This will open the property settings in a new browser tab. All properties that have been previously set will be displayed here in the property list. If you would like to view the properties, click on the magnifying glass icon. Alternatively, to edit the property entry, click on the pen and paper edit icon. This will allow you to change the name and icon of the property and change the status from active to inactive. Should you wish to permanently delete the property, click instead on the delete button from within the edit and view screens or the red "x" button in the property list. Alternatively, to add a new property, click on the grey "add" button and input a description, image, status as active or inactive, and click on the blue "add" button to save the entry.

Dashboard

The dashboard contains a number of important reports that may be important success indicators. The first, quotes, compares the acceptance and rejection rates of jobs entered into Your Radar. Pie charts

of acceptance versus rejection rates are shown, organized by customer account. Additionally, the project acceptance rate is shown annually using a bar graph. This graph provides a good overview of the performance of the company, using job acceptance rates as the performance metric.
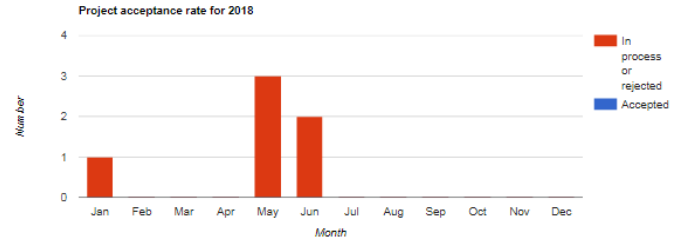
The next option, track assets, allows you to keep track of your physical assets. If your company deploys technicians in trucks, your fleet will be listed here. To view each item, click on the magnifying glass.
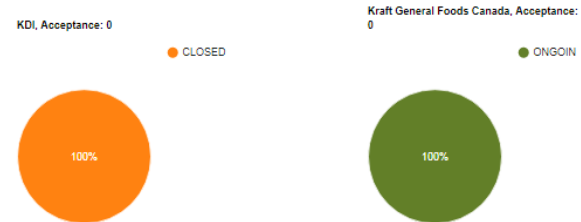
The timesheet report allows you to generate timesheet data which may be exported to Microsoft Excel for payroll purposes. By selecting an employee from the drop-down menu, and a relevant period using the start and end calendars and clicking on the grey "report" button, users' timesheets during the period will be displayed in a chart broken down by job. This data can be exported as a spreadsheet and easily imported into popular accounting and payroll softwares, such as Quickbooks or Sage.

The job report generates reports on specific jobs that have been completed. Selecting a job from the drop-down menu and then a period during which entries should be displayed will generate job information, including the job's name, firm, and stage at which the job currently is. The grey bar below the entry depicts the level of progress that has been made on the job.

Description	Total Hours This Month	Total This Month	Total Hours To Date	Total To Date
Suppliers		$0.00 (includes PST: $0.00)		$0.00 (includes PST: $0.00)
Sub-total		$0.00 (PST: $0.00)		$0.00 (PST: $0.00)
Ivy Smith	114.93	$13792.00	295.62	$35474.00
JB	71.48	$0.00	91.98	$0.00
Lance Bowick	23.75	$0.00	23.75	$0.00
Ryan Soar	36.5	$2920.00	62.5	$5000.00
Sachin	23.67	$710.00	68.17	$2045.00
Tom Kobelt	1	$100.00	3	$300.00
JK		$0.00	0	$0.00
SW		$0.00	237	$0.00
Sub-total	271.33	$17522.00	782.02	$42819.00
Totals		$17522.00		$42819.00

Download as spreadsheet

The project progress report generates similar reports, but instead of displaying progress, displays the total hours and revenues traceable to projects undertaken. By selecting a project from the drop-down menu, and a time period using the start and end calendars, the hours recorded by each individual employee and associated revenue are listed. The totals found at the bottom of the charts are very useful for forecasting and revenue tracking. By exporting the project progress reports as spreadsheets, the revenue generated from projects and expenses realized from associated expenses can easily be tracked month to month to identify which projects are the most profitable.

If you would like to display the same data for one particular month, rather than a customizable period, the project progress breakdown report may be used instead. In both cases, the total revenue figures may be clicked on to display the individual timecards associated with them.

Jobs
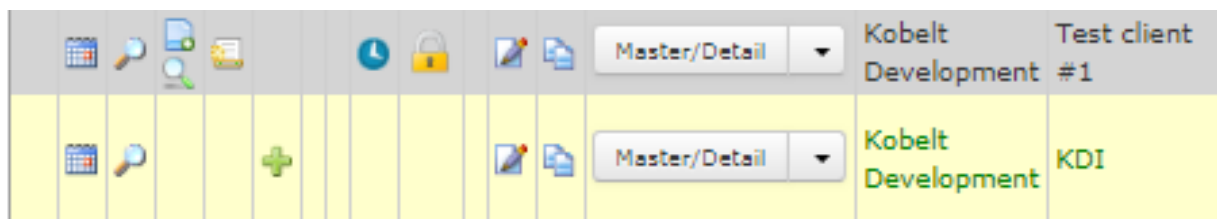
The jobs list displays all jobs that have been initiated in Your Radar. To change the way that the list is sorted, click on the heading that you would like to sort the sheet by. To display them in reverse order click on the heading again.

There are a number of different things that you can do with each entry. Each icon on the left side of the entry represents an action. The calendar icon will display the employees that are booked on the jobs and the dates on which they have tentatively been dispatched. The magnifying glass icon allows you to display all the job details recorded in Your Radar, as pictured on the right. When you are satisfied with your changes, click on the blue "edit" button to upload your changes.

The next icon, the small blue rectangle with the circle on the bottom right corner, allows you to add a purchase order associated with the job entry. Clicking on this icon will display the "add direct purchase order" screen. This can be used to record invoices received from suppliers on materials and parts ordered. In order to complete this form, you must input the date on which the supplies or parts were ordered, the type of order, status, vendor, monetary value of the quote received, and the name of the employee who placed the

Direct Purchase Order - Add (Accounts Payable)

Home / / Add

Job	Test Job #1	Date Ordered *	2018/06/13	
Assign a P.O. Number		Order Type *	Please Select ▼
Ordered By *	Please Select ▼	Order Status *	Draft ▼

| Vendor * | ☑ List Vendors Only | Please Select ▼ |
| Tax Number | Tax Number |

| Quote Amount | 0 | Notes | Notes |

[+]Show More Options

Item	Unit Price	Quantity Ordered	Quantity Received	Line Total (Price×QTY Receive
✕ Delete Item	0	0	0	0.00
Add Blank Row			Subtotal	0.00

Tax

Sales Tax	Taxable Amount	Sales Tax Type	Sales Tax Amount
Add Blank Row		Total Taxes	0.00
		Total	0.00

purchase order. The next section of the purchase order requires you to input information on all of the items that were included in the invoice. If you need to add more rows to the item list, click on the grey "add blank row" button. Finally, you must input the proper tax amounts to generate the total invoice amount. When you are satisfied with the order, click on the blue "add" button to submit it.

The next icon is the green magnifying glass. This option is used to return parts. If you have recently purchased items and recorded the invoice, but would no longer like to keep the items, you would use this option to return the items from the initial invoice ad remove them from the system. Clicking on the "+" button will display further information on the job. Expanding each of the items will show all of the information associated with that job, such as parts and equipment used, documents attached, the account representative, time sheet, customer account, and cost.

Company	Kobelt Development
Customer Account	Test Client
Reference #	1975
Parent Job	
Job Name	Test Client V1M 1J3 1234567890|27956
Office Admin/Estimator	
Job Foreman	Sachin
Incident Type	Quotation
Job Type	Appliance Hookup
Incident Status	Quotation Submitted
Confirmed By	
Date Added	2018/06/06
Before Questionaire	
After Questionaire	

The next icon, the small blue clock, is the timesheet. This will generate a report of the employee hours recorded in their timesheets associated with this job, in addition to any notes that they have entered associated with the job. The lock icon allows you to close the job and mark it as complete. Doing so will prevent further changes, and should therefore only be used after the job has been completed. The pen and paper icon next to the lock is the edit button. Clicking on the edit button will allow you to edit any part of the job entry. When you are satisfied with your edits, click on the edit button at the bottom of the screen.

The final icon is the copy button, which resembles two overlapping sheets of paper. Clicking on this button will create a new entry that is an exact duplicate.

Quotes

To view quotes, open the jobs drop down menu and select quotations. This will bring you to the quote overview page. Here, all quotes are displayed, organized by status. As you can see on the right, each status level is displayed in a separate table, with its own colour. Quotes that are marked as "completed", have been created for customers. Quotes that are "ongoing" have yet to be finished, and have likely been started but not yet completed. Quotes that are "submitted" have been entered into Your Radar, likely given to the customer to review, and are waiting for customer confirmation. Quotes that are "accepted" have been reviewed and approved by the customer, while those that are "rejected" have not been approved by the customer.

To create a new quote, click on the blue "create quote" found in the top center of the quotation landing page. Here, you will be prompted to input the type of job (the overall job type), work involved (the specific job that will be done), and parts needed. Based on this data, a total quotation amount will be generated. This quote may ultimately be shown to the customer before the service is conducted to provide an estimate of the final price of the service. Once all of the required information has been inputted, click the large blue "submit" button to save it.

Once you click the "submit" button, a box will pop up requiring further information about the quote you are creating. This will prompt you to double check the quote information that you previously entered. Additionally, you will need to select a priority

level from the drop-down priority level menu, assign the quote to an employee or technician, and include some notes in the internal comments/remarks field. If a colour or design has been specified by the client in the quotation process, you will record that information here. When you are satisfied with the additional information, click on the grey "save" button to upload your quote.

The quote timesheet page is found under the drop-down menu by clicking on quote/timesheet. This screen displays the billable hours from the timesheets associated with each quote. Similar to the job list, the timesheet list has a number of functions that can be accessed using the icons to the left of each listing. To display the full information associated with the quote, click on the magnifying glass

					Company	Job Name	Account Representative	Date	Start Time	End Time	Actual Time	Billable Time
🔍	✏️	📄	OT	📊		Kobelt Development	Spady Trans Web Site Update	Sachin	2018/06/06	14:15:00	14:15:00	00:00:00	00:00:00
🔍	✏️	📄	OT	📊		Kobelt Development	appliance	Sachin	2018/06/05	15:30:00	00:00:00	00:00:00	00:00:00
🔍	✏️	📄	OT	📊		Kobelt Development	Test Client	Sachin	2018/06/04	12:30:00	12:30:00	00:00:00	00:00:00
🔍	✏️	📄	OT	📊	Master/Detail ▼	Kobelt Development	Test Client	Sachin	2018/06/04	12:45:00	15:45:00	03:00:00	03:00:00
🔍	✏️	📄	OT	📊	Master/Detail ▼	Kobelt Development	appliance	Sachin	2018/06/01	11:30:00	13:30:00	02:00:00	02:00:00
🔍	✏️	📄 📕	OT	📊	Master/Detail ▼	Kobelt Development	KDI	Sachin	2018/05/30	10:00:00	12:00:00	02:00:00	02:00:00

icon. If you would like to edit the entry, click on the pen and paper icon to the right of the magnifying glass. When you have made the changes you want, click on the blue "edit" button to save the updated entry. To duplicate the entry, click on the overlapping papers icon. The next icon, found on the last listing in the image above, allows you to review any PDF documents attached to the quote.

The next icon is overtime assignment. If you would like to assign overtime hours to the timesheet associated with the listing, click on the OT icon. Once you have added the desired amount of overtime, click on the blue "update" button to add the overtime hours to the timesheet. Finally, the rightmost icon displays a report of the timesheet, breaking down the hours per technician associated with the entry.

Add hours and minutes

hour : minut

Update

Job Pricelist/Items

Code	Type	Level	Hours	Amount
APP-0072-0010	Install New Bumper to D/W or Washing Machine W/ Related Task, Per Each	Best Price Today		1200.00
BLR-L022-0005	Chemical Rust Inhibitor Lubricant - Price Per One Litre Per 100M BTU	Best Price Today		102.90
BLR-L022-0005	Chemical Rust Inhibitor Lubricant - Price Per One Litre Per 100M BTU	Gold Card Member		101.85
BLR-L022-0005	Chemical Rust Inhibitor Lubricant - Price Per One Litre Per 100M BTU	Secondary Add		96.10
BLR-L022-0005	Chemical Rust Inhibitor Lubricant - Price Per One Litre Per 100M BTU	Platinum		101.33
TOI-G026-0015	S/I/ TOTO Supreme 25 1/2" Height Toilet w/ Seat, Bolts, Seals, Br/Sup	Best Price Today		933.82
APP - 0051 - 0015	Replace Washing Machine or D/W Drain Hose AS SECONDARY TASK	Best Price Today		70.98

The job pricelist records the estimated prices of every specific type of job recorded in Your Radar. The same job price list can be found in the technician interface in the "documents" application. The list can be filtered by client or job type, or you can manually scroll through the listing to find the job you are looking for.

To add a new job pricelist item, click on the "add pricelist/item" button from within the options in the job pricelist listing in the drop-down job menu in the navigation bar. Here, you will be prompted to select a job type and category already listed in Your Radar, for which you may create a job item or a pricelist. To create a job pricelist, click on the blue "Add job pricelist" button and input the required data to be displayed in the pricelist. If you would like to add multiple pricelists for one job, click on the large blue "+" button. When you are satisfied with your new pricelists, click on the blue "submit" button. This will create a new listing in the job pricelist.

Contacts

The contact management account house all of the contact information and service history for all of your clients recorded in Your Radar. The contact list option from the drop down contacts menu will display all contact listings that you have recorded in Your Radar. Here, you may easily view and modify contact information, service history, and record the contact information for new clients. You may sort the contact list however you like by clicking on the field that you would like to sort the entries by. Clicking on the field once will sort the sheet by the field in alphabetical and chronological order, clicking twice will sort the field in reverse alphabetical and reverse chronological order.

To view the customer's information, click on the magnifying glass icon. This will display all of the information associated with the account. To review the contacts associated with the account, click on the contacts button. If no contacts exist,

you can add a new contact using the "add new contact" button, or add a contact that may have been added to the wrong account using "add existing contact".

To add a new account, click on the contacts and select add contact from the drop down menu and fill out the required information. Once all of the information has been inputted, save the new account by clicking the "add" button. If you would also like to add a contact to the new account, check the "add new contact" box and fill out the required information. When you are satisfied with the entry, click on the blue "add" button.

Purchase Orders

To display purchase orders, click on the order button and select purchase order from the drop down menu. This will display all of the POs entered into Your Radar. You can search within POs by order number, if known, account, job, type, status, or keyword. Once you've found the PO you need, click on the pen and paper icon to view or edit the PO. If you would like to edit the PO, ensure that you also update the sales tax before saving your changes by clicking on the edit button. If the PO has been approved, change the status to "approved" to prevent any further edits.

If you would like to add a new PO, click on the add button found at the top or bottom of the PO list. Once all of the information has been entered, click on the add button to save the PO. If you would like to request a particular PO, use the generate PO # option found within the order drop down menu. To submit the PO request, include a description of the PO in the text box and click on the request button. This will send a PO request.

Inventory

Your inventory list keeps track of all items that you have located in your vans, warehouse, and other storage spaces that your company uses. Keeping track of your inventory allows field employees and technicians to easily check if they have needed items and parts available on hand during a service call and allows you to monitor which items are used frequently or infrequently to adjust the type and quantity of specific inventory types that you keep on hand.

To display your inventory list, click on "inventory" in the main navigation bar on the job homepage and select inventory list from the drop-down menu. This will display a list of all items that have been entered into Your Radar. Items can be listed alphabetically or reverse alphabetically by clicking or double clicking on the column that you want to sort your inventory list by. To display more details or edit an inventory item listed, click on the leftmost magnifying glass. This will display all of the information currently entered into Your Radar associated with the item. In order to edit this information, click on the "edit" button found at the top of the listing. Once you are satisfied with your changes, click on the blue "edit" button found at the bottom of the screen to save the entry.

Adding New Inventory

To add new inventory, click on the grey "add" button from the inventory list. This will display the add inventory form. This form will prompt you for listing information about the new inventory item, including its item class, name number, whether or not it is a commodity, the units that should be used to measure it in the technician parts application for generating invoices. Additionally,

you may add further information about the inventory item, including its shelf life, warranty, date after which it should be removed from the system, and any notes that are relevant to the entry.

If the item you are creating a PO for is not in the drop-down item list, click the "add new item" button to create

a new item. This will prompt you to type in the item name and number and select the item's item class from the drop-down menu. Once all of the information is complete, Your Radar will auto-generate a total, which should match the total on the PO or quote you have received from your suppliers. If you would like to add a new type of inventory, use the add inventory/warehouse file button found above the first item in the inventory list. Here, you must include the company, item class and name, commodity type, unit of measure, and sort. When you are satisfied with your entry, click on the blue "add" button to save the new file.

Warehouse Files

The green magnifying glass next to each entry will allow you to display the warehouse file associated with each inventory item. The warehouse file records the cost, quantity in inventory, purchase order, order status, and further information on the inventory item, including the job number the item is associated with, type of warehouse file, and upload and edit history by user. In addition to reviewing the document, you can review the items movement and transactions associated with it by clicking on

Company *	Kobelt Development
Item Class *	Please Select ▼
Item Name *	Item Name
Item Number *	Item Number
Commodity *	Please Select ▼
Unit of Measure *	Please Select ▼
Unit Weight	0
Sort *	1
Lot Control Status	⦿ Active ○ Inactive
Non Stock Status	⦿ Active ○ Inactive
Delete Date	Delete Date 📅
Shelf Life	0
Warranty Days	0
Notes	Notes

	Warehouse Code	Location Type	Cost	Quantity on Hand	Last Cost
✕ Delete	Please Select ▼	Please Select ▼	0	0	0

Add

the "+" icon next to each warehouse file. This will display the item movement tab below the entry or allow you to switch to the item transaction tab. The item movement tab allows you to track the movement of each inventory item between warehouses, storage facilities, and technician vans. The item transaction tab displays more information associated with the purchase of the inventory item

whose warehouse file you are viewing, including supplier, order number, quantity, cost, and transaction date. When you are finished reviewing the file, simply close the browser tab and return to the inventory list.

If you would like to add a new warehouse file, use the add inventory/warehouse file button found above the first item in the inventory list. When you are adding a warehouse entry, you must include the company, item class and name, commodity type, unit of measure, and sort under the inventory section of the form. Additionally, you must fill out the second part of the form, with the warehouse code, location type, cost, and quantity on hand. When you are satisfied with your entry, click on the blue "add" button to save the new file.

Account Representative

To view the list of account representatives, click on the account representative tab without selecting anything from the drop-down menu. This will display a list of user accounts in your company's Your Radar. Accounts can sorted by the field of your choosing by clicking on the name of the field once for alphabetical and twice for reverse alphabetical. To display details on each user, including their bill out rate, click on the magnifying glass to the left of the account representative listing. This will display the information concerning the user. If you would like to edit the information, click on the edit button above the information. This will allow you to change their full name, supervisor, color code, and add a customer email signature. When you are satisfied with your changes, click the edit button to save the changes and return to the last page.

To add a new account representative, or account representative rate, click on the" add account representative/account representative rates" button. This will open a form with two sections. If you are looking to add a new account representative, fill in the first section of the form, including the representative, their full name, supervisor, color code, and email signature. If you would like to add a new account representative rate, select the account representative, type their full name, and assign an hourly cost, or rate, and set a date upon which it will become effective. When you are satisfied with your entry, click the blue "add" button to upload your entry.

Settings

4

How can you customize Your Radar to work most effectively for your company?

There are a countless number of options for customization within Your Radar. We have ensured that your accounts have been set up and that your most essential data has been imported. This section will help you ensure that the rest of Your Radar is set up exactly the way you like it. It is important to note that there are more settings in Your Radar than have been outlined in this document. The settings that have not been outlined here should not be altered, as they have been carefully customized for your company. If you wish to change settings that have not been outlined here, please reach out to our talented support team at KDI who would be happy to help you with further changes.

General Settings

The first general setting is "company". This setting allows you to view and modify the company name and associated information. By clicking on the magnifying glass icon, more detailed information about the company settings will be displayed. Here, you can edit this information by clicking on the edit button. Once you are satisfied with your changes, click on the blue "edit" button to update the company settings. If you would like to add another company to Your Radar, click on the "add" button under the company page. This will prompt you for all of the same information and will create a second company within Your Radar. This allows you to navigate between two companies within all Your Radar applications and is especially useful if your company operates in multiple trades or industries.

Expense type settings allow you to input expense categories for field employees and technicians to record in their expenses

application. Opening the expense type settings will display all of the expense types entered in Your Radar. To review each expense type, click on the magnifying glass. To modify this information, click on the edit button at the top of the screen. This will allow you to modify the description and status of the expense type. When you are satisfied with your entry, click the blue edit button to save your changes. If you would like to add a new expense type, click on the add button at the top of the main expense type page. Once you have filed in the required fields, click the blue add button to save the entry. If you are entering multiple expense types, use the grid add button. This will allow you to add multiple entries at once by clicking "add blank row" and entering the next entry. Once you have inputted all of your expense types, click on the insert button to save the expense types.

The invoice settings are divided into two main categories: invoice settings and invoice template. The invoice settings allow you to customize the information that is shown on the automatically generated invoices. Customizing the header and footer allow you to choose the text that you want displayed at the top and bottom of your invoices. You can also upload your company's logo to be included with your header. There are a few important settings to review. The "Invoice email client" option allows you to automatically send clients invoices by email. The "invoice settings" allow you to specify which sections of the invoice you would like to display to clients. The options that you select will be automatically included in invoices generated. If you would like to customize your invoice template, you can do so using the "invoice template" setting. In this screen, you can cut and paste your customized invoice into the text box. This will default to use the custom invoice template for automatically generated invoices in Your Radar. If you would like to upload a custom template, but would not like it to be used for automatically generated invoices, ensure that you set the status as inactive. This will store the template in Your Radar but will use the non-customized auto-generated invoice template.

The "terms" settings allow you to set different payment terms on your invoices. To view the term options that you have previously set, click on terms in the drop-down general settings menu. To view a term's details, click on the magnifying glass. To modify an entry, click the "edit" button from within the term details page. When you are satisfied with your entry, click on the blue edit button to update the term. To add another term, click on the add button from the main terms screen. Here, you will be prompted for a terms code and name. The code is the short form that will be displayed for invoicing. When you are satisfied with your entry, click on the blue add button to add the new term.

The "vacation type" settings allow you to set different time off options for your employees to request. To view the vacation types that you have previously set, click on vacation type in the drop-down general settings menu. To view a time off request category's details, click on the magnifying glass. To modify an entry, click the "edit" button from within the vacation type details page. When you are satisfied with your entry, click on the blue edit button to update the vacation type. To add another type, click on the add button from the main vacation type screen. Here, you will be prompted for a day off type. When you are satisfied with your entry, click on the blue add button to add the new time off type.

The next setting is "season master". This setting allows you to set different seasons in Your Radar. Each season has a different factor and month or month(s) assigned to it. To display this information, click on the + sign next to the entry. In order to edit the season, click on the pen and paper icon next to the magnifying glass and ensure to click the blue edit button o save your changes. To edit the factor and assigned months, click on the + button, then seasons details button found below the season details chart, and then click on grid edit to edit multiple fields at once. When you are satisfied with your changes, click on the save button. To add a new season, return to the season master page and click on the add button, input the required information and click the blue add button. Once the season has been added, select it from the season master menu, click on the + button, click season details, and then click grid add to add a factor and assigned month. When all of the information you want is entered, click on the insert button to add the information to the new season.

The "vacation type" settings allow you to set the categories of time off that employees may request in the technician interface. To add a new category, click on the grey "add" button. If you would like to remove one of the options from the technician interface, click on the pen and paper icon next to it and change the status to inactive.

The season details setting displays all of the factor and month entries associated with season master entries. To edit these entries directly, use this screen and use the grid edit button. When you are satisfied with the entries, click on the save button. If you would like to add more entries, you can either

click on the add blank row button and then save the entry in this same screen, or return to the main season details page and click on the add button, fill in the required information, and click the blue add button to save the entry.

			Account Representative	Start Date	End Date	Vacation Type	Status
🔍	📝	📄	Ivy Smith	2015/09/08	2015/09/09	Vacation	Approved
🔍	📝	📄	Sachin	2015/10/07	2015/10/09	Vacation	Approved
🔍	📝	📄	Ivy Smith	2015/12/21	2016/01/04	Vacation	Approved
🔍	📝	📄	Sachin	2015/12/29	2015/12/31	Vacation	Approved
🔍	📝	📄	Joel Biscaro	2015/12/24	2015/12/31	Vacation	Approved
🔍	📝	📄	Ryan Soar	2016/04/22	2016/04/26	Vacation	Approved
🔍	📝	📄	Tom Kobelt	2016/02/12	2016/02/19	Vacation	Approved
🔍	📝	📄	Ryan Soar	2016/02/11	2016/02/11	Vacation	Requested
🔍	📝	📄	Joel Biscaro	2016/03/21	2016/03/21	Vacation	Requested
🔍	📝	📄	Sachin	2016/02/22	2016/02/22	Sick Leave	Approved
🔍	📝	📄	Ivy Smith	2016/05/23	2016/06/03	Vacation	Approved
🔍	📝	📄	Sachin	2016/03/02	2016/03/02	Vacation	Requested
🔍	📝	📄	Sachin	2016/03/23	2016/03/23	Vacation	Approved
🔍	📝	📄	Joel Biscaro	2016/09/23	2016/10/02	Vacation	Requested
🔍	📝	📄	Joel Biscaro	2016/09/09	2016/09/12	Vacation	Requested
🔍	📝	📄	Alex (Giwan) Kwon	2016/07/14	2016/07/18	Vacation	Requested

The "vacations" settings allow you to view, edit, approve and deny past and current employee requests for time off. When employees make requests for time off, they will show up here with a status of "requested", it will be received by the system administrator. Once the administrator approves or denies the request, the employee will receive an email with the status update and it will appear in this screen. If you would like to manually approve or deny a request, click on the edit button and change the status to "approved" or "denied". If you would like manually add a request, click the add button, select the employee, start and end dates, type, and status and then click the blue add button to save the vacation. This vacation will then show up in the employee's vacation application with an approved status.

The "document type" settings list all of the types of documents that may be generated in Your Radar using information inputted by the technician. Each document represents an action after which an employee or technician may generate a receipt, invoice, or complete a survey or order form of some type. If you would like to add a new type, use the grey "add" button. To alter an existing document, click on the pen and paper icon.

		Description	Status
🔍	📝	Drawing	Active
🔍	📝	Quote	Active
🔍	📝	Site Instruction	Active
🔍	📝	Material List	Active
🔍	📝	O & M's	Active
🔍	📝	As Builts	Active
🔍	📝	Submitted Shop Drawings	Active
🔍	📝	Approved Shop Drawings	Active
🔍	📝	Specifications	Active
🔍	📝	Picture	Active
🔍	📝	Balance Report	Active
🔍	📝	Start Up Reports	Active
🔍	📝	Direct Purchase Order	Active
🔍	📝	Site Order List	Active
🔍	📝	Direct PO for Vendor	Active
🔍	📝	Audio and Visual	Active

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Add

The "Action Events" settings have four sub-setting sections: "reference group", "referee questions", "referee remarks", and "referee options". Each of these sub-settings allow you to alter existing or create new surveys that technicians will complete before, after, or during job tasks.

				Group ID		Action Name			Active	
⊟	🔍	✏️	📋	4		Truck Pick Up			Yes	

Referee Question

Action Name	Question ID	Question	Sequence	Question Comments	Remarks	Answer Type	Status
Truck Pick Up	1	Did you check tools?	0			Radio	No
Truck Pick Up	2	What tools are there in the truck?	0			Checkbox	No
Truck Pick Up	3	What do you think about the condition of the truck?	0			Text 17	No
Truck Pick Up	4	Personal belonging you may need, lunch, extra clothes and cell phone.	0			Radio	Yes
Truck Pick Up	5	Personal protective equipment in Van?	0			Checkbox	Yes
Truck Pick Up	6	Cooler is in the van and stocked.	0			Radio	Yes
Truck Pick Up	7	Items needed to provide service:	0			Comments	Yes
Truck Pick Up	8	Collection of payment items: terminal, invoice book, pens, calculator, stapler, envelopes	0			Checkbox	Yes
Truck Pick Up	9	If refilling of gas cans or van do this on the way to the first job or when convenient throughout the day.	0			Comments	Yes

The "reference group" contains all of the different surveys that technicians are given at job sites. To view the details of one group, click on the plus icon to its left. This will display all of the questions contained in the jobsite survey and the type of answer that they will prompt. To edit the name and status of the survey, click on the pen and paper icon, make the required changes, and click on the blue edit button to save the changes. If you would like to edit the questions contained within the jobsite surveys, return to the reference group screen, click on the plus icon, and scroll to the end of the questions to click on the master/detail edit button. This will allow you to edit the questions, comments, sequence, and answer types. If you would like to add a question, scroll to the bottom of the screen and click on the "add blank row" button. When you are satisfied with your edits, click on the blue edit button to save your entry. If you would like to add a new jobsite survey, click on the add reference group/referee question button at the top of the reference group list. This will prompt you to create a name for the survey and add as many survey questions and answer types as you would like. When you are satisfied with your survey, click the blue add button at the bottom of the screen to save it.

To view all survey questions, select the "referee questions" option from the drop-down action events menu. All questions contained in all surveys saved in Your Radar will be displayed in this page. To edit any

				Action Name	Question ID	Question	Sequence	Question Comments	Remarks	Answer Type	Status
⊞	🔍	✏️	📋	Truck Pick Up	1	Did you check tools?	0			Radio	No
⊞	🔍	✏️	📋	Truck Pick Up	2	What tools are there in the truck?	0			Checkbox	No
⊞	🔍	✏️	📋	Truck Pick Up	3	What do you think about the condition of the truck?	0			Text 17	No
⊞	🔍	✏️	📋	Pre-job fill up	1	Inspect Roof	0			Radio	Yes
⊞	🔍	✏️	📋	Pre-job fill up	2	Job to do list?	0			Checkbox	Yes
⊞	🔍	✏️	📋	Post Job Analysis	1	Tools gathers and put back in the truck?	0			Radio	Yes
⊞	🔍	✏️	📋	Post Job Analysis	2	Site inspected	0			Checkbox	Yes
⊞	🔍	✏️	📋	Truck Drop Off	1	Gas Filled?	0			Radio	Yes
⊞	🔍	✏️	📋	Truck Drop Off	2	Tools accounted for and arranged?	0			Radio	Yes
⊞	🔍	✏️	📋	Truck Pick Up	4	Personal belonging you may need, lunch, extra clothes and cell phone.	0			Radio	Yes
⊞	🔍	✏️	📋	Truck Drop Off	3	Return personal protective equipment to proper storage location.	0			Radio	Yes
⊞	🔍	✏️	📋	Window Cleaning Pre-Job Form	1	Tell them what you are doing for them.	0			Comments	Yes
⊞	🔍	✏️	📋	Window Cleaning Pre-Job Form	2	Equipment Failure	0			Radio	Yes
⊞	🔍	✏️	📋	Window Cleaning Pre-Job Form	3	If equipment failed, why?	0			Text 3	Yes

question, click on the pen and paper icon next to it. If you would like to display the possible answer options for a survey question, click on the plus sign icon. When you are satisfied with your questions, remember to click on the edit button to save the changes.

			Action Name	Question	Sequence	Answers	Status
🔍	✏️	📄	Truck Pick Up	Did you check tools?	1	Yes	Inactive
🔍	✏️	📄	Truck Pick Up	Did you check tools?	2	No	Inactive
🔍	✏️	📄	Truck Pick Up	What tools are there in the truck?	1	Hammer	Inactive
🔍	✏️	📄	Truck Pick Up	What tools are there in the truck?	2	Saw	Inactive
🔍	✏️	📄	Truck Pick Up	What tools are there in the truck?	3	Lever	Inactive
🔍	✏️	📄	Pre-job fill up	Did you check tools?	1	Yes	Active
🔍	✏️	📄	Pre-job fill up	Did you check tools?	2	No	Active
🔍	✏️	📄	Pre-job fill up	What tools are there in the truck?	1	Roof Cleaning	Active
🔍	✏️	📄	Pre-job fill up	What tools are there in the truck?	2	Gutter Cleaning	Active
🔍	✏️	📄	Pre-job fill up	What tools are there in the truck?	3	Power Washing	Active
🔍	✏️	📄	Post Job Analysis	Did you check tools?	1	Yes	Active
🔍	✏️	📄	Post Job Analysis	Did you check tools?	2	No	Active
🔍	✏️	📄	Post Job Analysis	What tools are there in the truck?	1	Roof Checked	Active
🔍	✏️	📄	Post Job Analysis	What tools are there in the truck?	2	Gutter Checked	Active
🔍	✏️	📄	Post Job Analysis	What tools are there in the truck?	3	Windows Checked	Active
🔍	✏️	📄	Truck Drop Off	Did you check tools?	1	Yes	Active
🔍	✏️	📄	Truck Drop Off	Did you check tools?	2	No	Active

The referee options menu displays all possible answers organized by survey question. In order to edit questions, click on the pen and paper icon and click on the blue edit option to save any edits made. If you would like to remove an answer that has previously been entered from the survey answer options, change its status from "active" to "inactive", this will ensure that employees and technicians are unable to select that answer in completing their surveys.

User Configuration Settings

				Username	Password	Email	User Level	Company	Status
⊞	🔍	✏️	📄	TK	********	tom@kdi.ca	********	Kobelt Development	Active
⊞	🔍	✏️	📄	AC	********	annette@kdi.ca	********	Kobelt Development	Inactive
⊞	🔍	✏️	📄	JM	********	judy@kdi.ca	********	Kobelt Development	Inactive
⊞	🔍	✏️	📄	JC	********	jim@kdi.ca	********	Kobelt Development	Inactive
⊞	🔍	✏️	📄	DT	********	derek@kdi.ca	********	Kobelt Development	Active
⊞	🔍	✏️	📄	DC	********	darren@kdi.ca	********	Kobelt Development	Active

The user list shows a list of all Your Radar users at your company. Each user has their username, password, email, and user level recorded. To view their dispatch and rate information, click on the plus sign found to the left of their username. The account representative tab displays more information about the employee, including their supervisor, color code in the schedule, and email signature for client communications. To view their rate, click on the account representative rates. If you would like to add a new user, click on the add user/account representative/rates button. This will prompt you for account information, including username, password, email, and user level, as well as scheduling information such as their color code, email signature and full name, and their effective, or start, date with the company and pay rate. When all of the necessary information has been inputted, click the blue add button to save the new user. The user will then be able to log into Your Radar.

Job Configuration Settings

The "client" level settings can be found in the sub-job configuration settings from the drop-down settings menu in the navigation bar. These settings allow you to specify the pricing settings for different customer groups. In the image on the right, there are four different client levels to be used for invoicing. To change an existing setting, click on the pen and paper icon and ensure that you click on the blue "edit" button when you are satisfied with your changes to upload them to Your Radar. If yoy would like to add a new customer level, click on the grey "add" button found above and below the client level list. When you have completed your entry, click on the blue "add" button to upload it.

The "ITJob Pricing" settings contain a list of all of the job price estimates for all jobs available within Your Radar. It is likely that in your system, all jobs have been left with a price of $0.00. In this case, you will want to use the

grey "grid edit" button to enter the correct price estimates of each job listed in the job pricing grid. When you have inputted all of the price estimates, click on the grey "save" button with the green checkmark found at the top or bottom of the edit screen. This will save your entries in Your Radar.

The "ITJob Items" settings contains a list of the average quantity of materials required for every job available within Your Radar. It is likely that all jobs have been assigned a quantity required of 0. In this case, you will also want to use the grey "grid edit" button to enter the correct quantity estimate, unit price, and tax value so that the materials may be properly added to quotes and invoices created by technicians. Again, you will click on the grey "save" button to save your entries to Your Radar.

The "Job Type" settings will display a list of the estimated number of hours required to complete each of the jobs

entered in Your Radar. In this case, should the number of hours be 0, you would need to click the pen and paper edit button beside each individual entry and input the estimated number of hours required, amount of cost generated, and taxes applied. When you are satisfied with each entry, you will click the blue "edit" button to save the entry.

The "brand" settings allow you to record brand information of brands of parts and equipment that are commonly used or serviced by your technicians. These brands will be found in the drop-down parts menu in the technician interface when they are adding in the parts that they have used or equipment that they have serviced while creating an invoice. To add a new brand, click on the grey "add" button. When you are satisfied with your entry, ensure to click on the blue "add" button to save the new entry.

The "incident priority" settings allow you to assign a dispatch priority level to jobs and quotes entered into Your Radar. To edit existing entries, use the pen and paper icon. If you would like to add a new priority, click on the grey "add" button. Ensure to save your new entry by clicking on the blue "add" button found at the bottom of the entry.

			Incident Status Code	Description	Transaction Status
🔍	📝	📋	REJECT	Quote Rejected	Active
🔍	📝	📋	ACCEPT	Quote Accepted	Active
🔍	📝	📋	BEGIN	Work Started	Active
🔍	📝	📋	END	Work Completed	Active
🔍	📝	📋	SUBMIT	Quotation Submitted	Active
🔍	📝	📋	CLOSED	Closed	Active
🔍	📝	📋	ONGOIN	Quotation Ongoing	Active
🔍	📝	📋	COMPLE	Quotation Completed	Active
🔍	📝	📋	INCOMP	Work Incomplete	Active

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Add   Grid Add   Grid Edit

The "incident status" settings specify the different statuses that jobs and quotations may have as they are created, dispatched, and completed. These statuses will appear in the job list and can be changed by technicians from within their interface throughout their service calls.

The "incident type" settings specify the types of transactions that may be initiated from within Your Radar. In the example on the right, you can see that there are only three types of

			Incident Type Code	Description	Account Representative	Status
🔍	📝	📋	QUOTE	Quotation	KELLY	Active
🔍	📝	📋	JOB	Task/Job	KELLY	Active
🔍	📝	📋	WO	Order/Manufacture	KELLY	Active

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Add   Grid Add   Grid Edit

transactions that have been created. Should you wish to edit these types, click on the pen and paper icon. If you would like to create a new type of transaction, click on the grey "add" button.