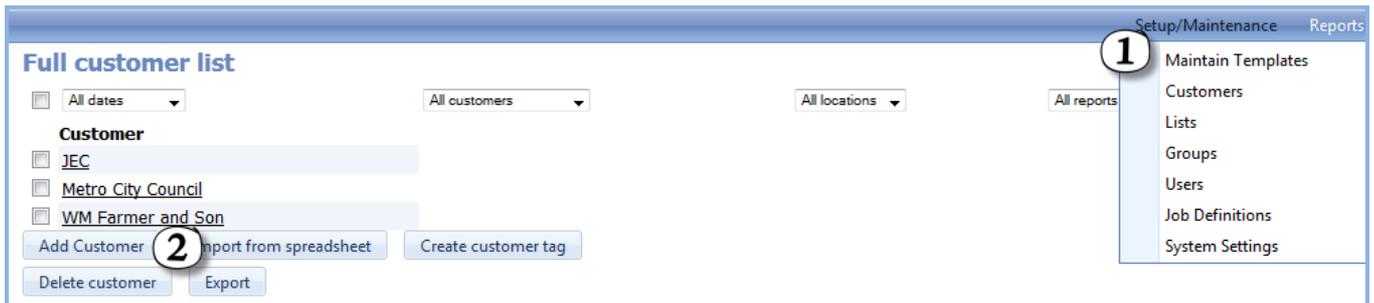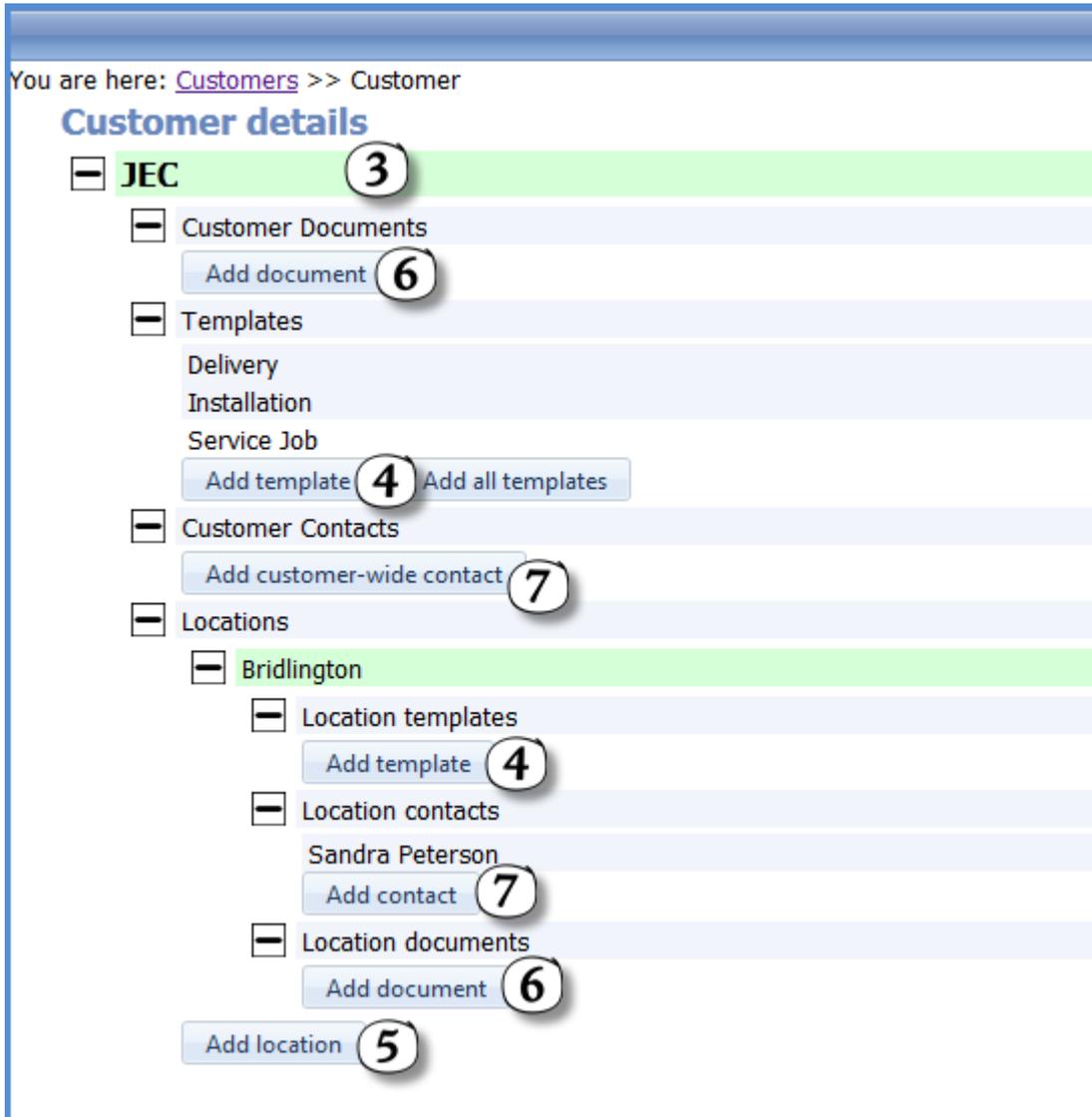## 1 Customers

1.1 Adding a customer

1. Display the **Customer list** by selecting Customers from the **Setup/Maintenance menu**.
2. Click on the **Add Customer** button.
3. Enter a **Customer name** (mandatory) and any other userful details.
4. See Editing a customer for help with adding location(s) and template(s).
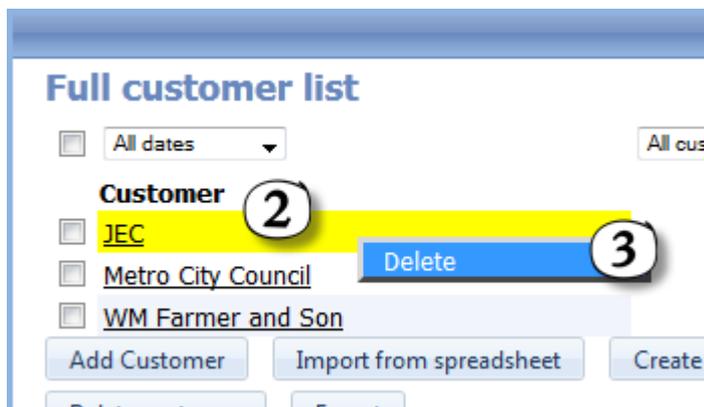

1.2 Editing a customer

1. Display the **Customer list** by selecting **Customers** from the **Setup/Maintenance menu**.
2. Click on the **customer** that you wish to edit.
3. Click on the **customer name** to edit details such as **address**, phone number, etc.
4. Add templates by clicking the **Add template** button and selecting from the drop-down list (essential).
5. Add locations by clicking the **Add location** button then filling in the **Location name** and any other details required (essential).
6. Documents (such as site maps, codes of conduct, etc) can be attached to either the customer or the location by clicking on the relevant **Add document** button.
7. Add any additional contacts required using **Add customer-wide contact** and **Add contact** (within each location).

You are here: Customers >> Customer

Customer details

□ **JEC** ③

    □ Customer Documents

        [Add document] ⑥

    □ Templates

        Delivery

        Installation

        Service Job

        [Add template] ④ [Add all templates]

    □ Customer Contacts

        [Add customer-wide contact] ⑦

    □ Locations

        □ Bridlington

            □ Location templates

                [Add template] ④

            □ Location contacts

                Sandra Peterson

                [Add contact] ⑦

            □ Location documents

                [Add document] ⑥

    [Add location] ⑤

1.3 Deleting a customer

1. Display the **Customer list** by selecting Customers from the **Setup/Maintenance menu**.
2. **Right-click** to bring up the context menu.
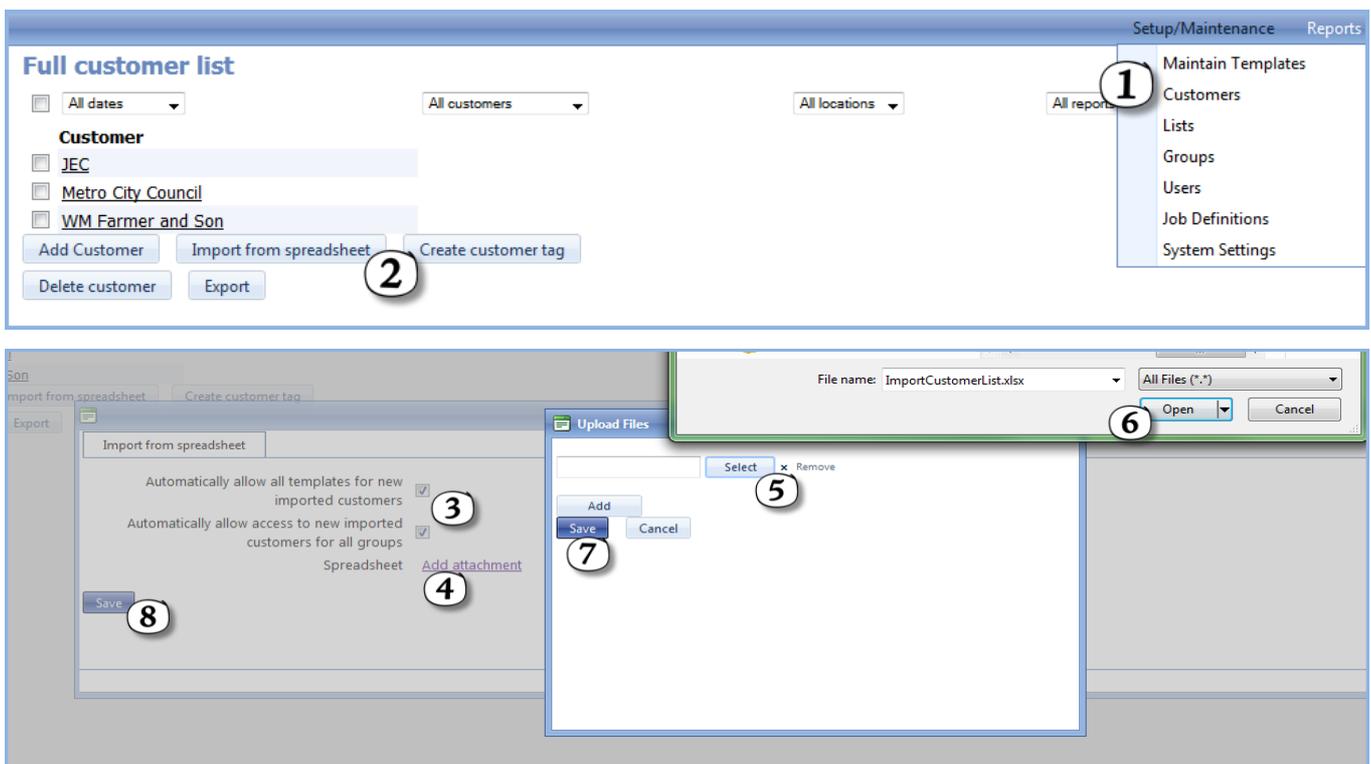3. Select **Delete** and confirm in the pop-up box.

Full customer list

☐ [All dates ▼]   [All cus]

Customer ②

☐ JEC | Delete ③

☐ Metro City Council

☐ WM Farmer and Son

[Add Customer] [Import from spreadsheet] [Create]

⚠	Please note that deleting a customer **cannot be undone**.
⚠	Please note that removing a customer will **not** remove jobs or reports linked to that customer but will prevent it from being used in the future.

1.4 Importing a customer spreadsheet

1. Display the **Customer list** by selecting Customers from the **Setup/Maintenance menu**.
2. Click on the **Import from spreadsheet** button which will open another window.
3. **Leave the defaults selected** for assigning all templates and groups to all customers (unless you wish to customise yourself). These can be amended at a later date.
4. Click on **Add attachment** (opens an Upload Files window).
5. Click the **Select** button (opens a Browse window).
6. **Browse** your computer for the already-prepared Excel **spreadsheet** (see Creating a customer spreadsheet for details) and click the **Open** button (closes Browse window and returns to Upload Files window).
7. Click the **Save** button to close the Upload Files window.
8. Click the **Save** button to close the Import from spreadsheet window and your customer list will be populated automatically.

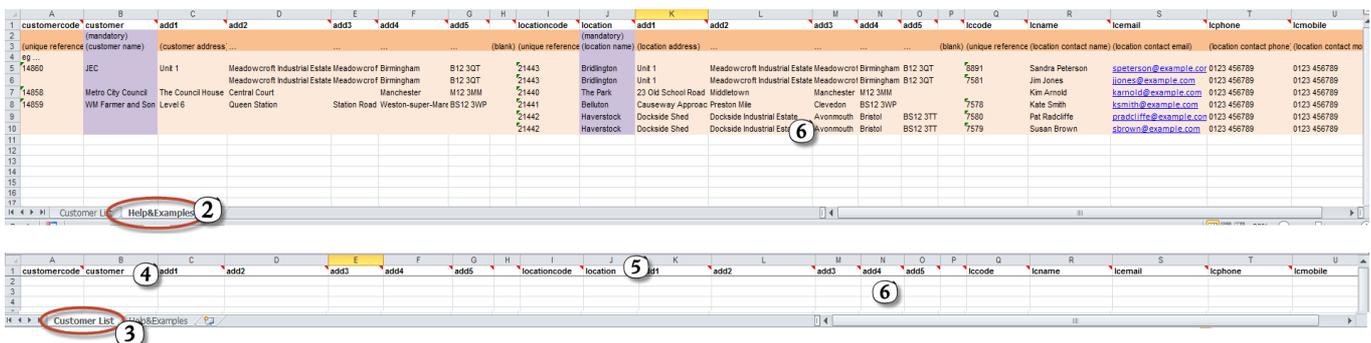## 1.5 Creating a customer spreadsheet

💡 Customer spreadsheets are great for large numbers of customers or those with many locations/sites. It is also useful if you already have a spreadsheet of customers that you can cut and paste into the template below.

1. Create a suitable format for copying items from an **existing customer list** (eg export to a .csv file and open in Excel) or print/display your list for manual typing.
2. **Download** the template **spreadsheet ('ImportCustomerList.xlsx' in the on-line documentation)** and look at the worksheet called **Help&Examples** for guidance.
3. Select the worksheet called **Customer List**.

4. Type or paste your **customer names** into **column B** (marked in purple in the example).
5. Type or paste the **location names** into **column J** (marked in purple in the example), ensuring that they correspond with the customer name entered in step 4. If a customer has more than one location, enter them immediately below each other, leaving the customer name blank in column B (refer to examples if required).
6. **Enter other information as required**, ensuring that it is in the correct row for the customer/location to which it is related (refer to examples if required). This is optional and can be amended manually through Setup/Maintenance->Customers at a later date.
7. Save to a suitable folder on your computer for uploading to in the next stage - Importing a customer spreadsheet.

> ⚠️ Hovering over a cell in the top row will give additional information about organising customer information - this may seem quite technical and can be returned to at a later date.

1.6 Import a Customer List

Create the spreadsheet to import

1. Create a suitable format for copying items from an **existing customer list** (eg export to a .csv file and open in Excel) or print/display your list for manual typing.
2. **Download** the template **spreadsheet ('ImportCustomerList.xlsx' in the on-line documentation)** and look at the worksheet called **Help&Examples** for guidance.
3. Select the worksheet called **Customer List**.
4. Type or paste your **customer names** into **column B** (marked in purple in the example).
5. Type or paste the **location names** into **column J** (marked in purple in the example), ensuring that they correspond with the customer name entered in step 4. If a customer has more than one location, enter them immediately below each other, leaving the customer name blank in column B (refer to examples if required).
6. **Enter other information as required**, ensuring that it is in the correct row for the customer/location to which it is related (refer to examples if required). This is optional and can be amended manually through Setup/Maintenance->Customers at a later date.
7. Save to a suitable folder on your computer for uploading to in the next stage - Importing a customer spreadsheet.

> ⚠️ Hovering over a cell in the top row will give additional information about organising customer information - this may seem quite technical and can be returned to at a later date.

Import into magic5

1. Display the **Customer list** by selecting Customers from the **Setup/Maintenance menu**.
2. Click on the **Import from spreadsheet** button which will open another window.
3. **Leave the defaults selected** for assigning all templates and groups to all customers (unless you wish to customise yourself). These can be amended at a later date.
4. Click on **Add attachment** (opens an Upload Files window).
5. Click the **Select** button (opens a Browse window).
6. **Browse** your computer for the already-prepared Excel **spreadsheet** (see Creating a customer spreadsheet for details) and click the **Open** button (closes Browse window and returns to Upload Files window).
7. Click the **Save** button to close the Upload Files window.
8. Click the **Save** button to close the Import from spreadsheet window and your customer list will be populated automatically.

1.7 Allow Ad hoc Customers in your template

💡 This facility means that on-site workers can undertake work for customers that are not on their customer list. This is often when work is undertaken as a one-off procedure and it is inefficient to store all the customer's names

> once the work is complete.
>
> Effectively a 'dummy' customer is created that can be selected on the device, and this will prompt the user to enter required details such as name, location, contact details, etc.

1. Display the **Customer list** by selecting **Customers** from the **Setup/Maintenance menu**.
2. Click on the **customer** that you wish to set up as a 'dummy'.
3. Click on the **customer name** to open the details box. If an asterisk (*) is used, this name will appear at the top of the list on the device. Alternatively, use 'zz' to position at the bottom.
4. Click on the **Advanced** tab.
5. Click on the **tickbox** next to *Holding account for new customers*.
6. Click **Save**.

7. Display the Template list (**Setup/Maintenance menu/Maintain Templates**) and select your template.
8. Select (or create then select) a **section** within your template to collect Adhoc customer information. Items in this section are likely to be **text boxes** for entering customer name, location, contact details, etc.
9. Select the **Display conditions (advanced)** tab.
10. Type (or cut and paste) **customerAttribute;adHocCustomer;equals;yes** into the first of the text boxes.
11. Click **Save**.
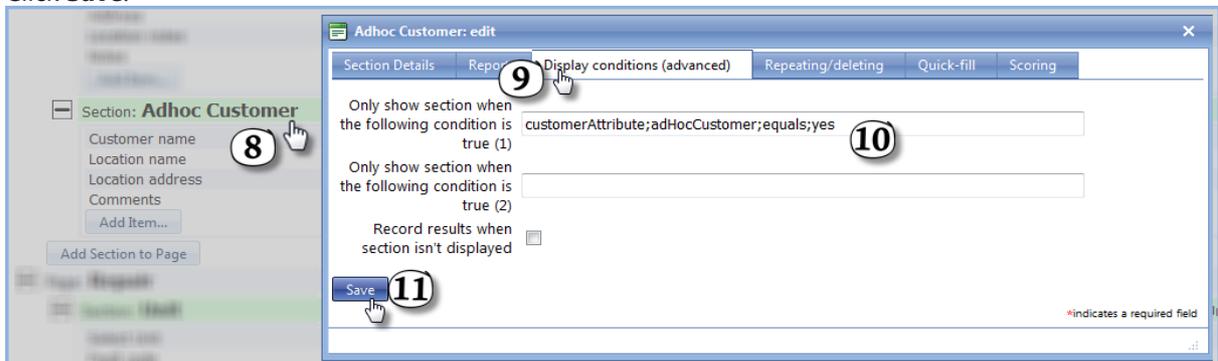
2   Users

2.1 Adding a user

1. Display the **User list** by selecting Users from the **Setup/Maintenance menu**.
2. Click on the **Add User** button.
3. Enter a **Username** (mandatory) and any other useful details such as name and email address. Bear in mind that these may be used to send emails and as text on reports sent to customers.
4. Enter (and confirm) a **5-character** (or more) **password**.
5. Select the **User Role**:
    a. **Customer** restricts access to completed and released reports indicated in the **associated customer** and **location** specified below.
    b. **User - device only** allows the user to log onto a device but not the Office Portal.
    c. **User - device/web** allows the user to log onto a device and access reports in the Office Portal.
    d. **Office** allows the user to log onto the Office Portal but not a device.
    e. **Administrator** has full access rights, although usually concentrate on the back-office portal and ensuring that lists, customers, etc are up-to-date.
    f. **Super admin** allows the user full access to the Office Portal and, for some device only applications, to make changes from a device.
6. **Save**.
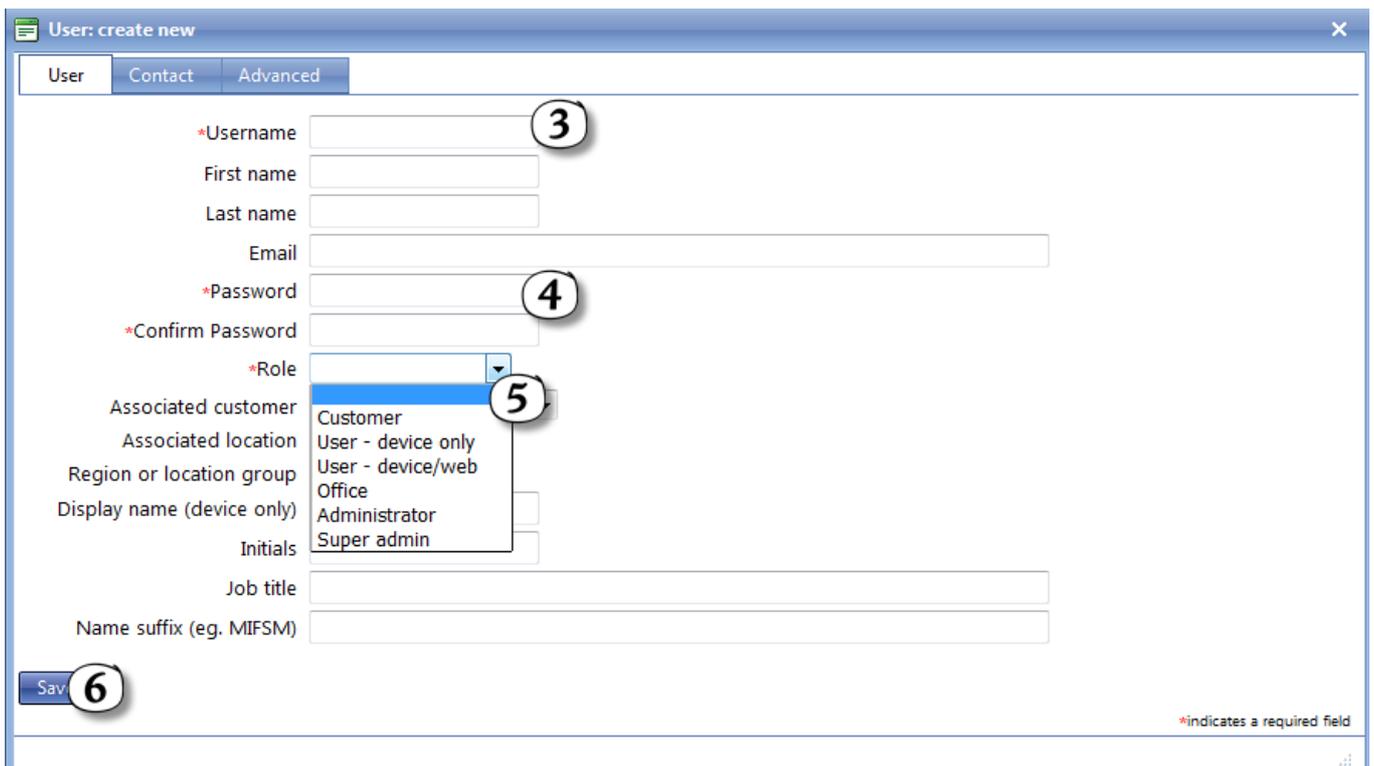
2.2 Editing a user

1. Display the **User list** by selecting Users from the **Setup/Maintenance menu**.
2. Click on the **User** that you wish to edit.
3. Click on the **username**.
4. **Modify** the required details (see Adding a user for further information).
5. **Save**.
6. New users are automatically added to the Standard group but further groups can be created and added if required.

2.3 Deleting a user

1. Display the **User list** by selecting Users from the **Setup/Maintenance menu**.
2. **Right Click** on the **User** that you wish to delete.
3. Click on **Delete**.
4. Alternatively, **tick the box** next to the user to be deleted.
5. Click on the **Delete user** button. This method is good for deleting several users at once.

⚠ | Please note that deleting a user **cannot be undone**.

⚠ | Please note that removing a user will **not** remove jobs or reports linked to that user but will prevent it from being used in the future.

2.4 Reset Password or Unlock Account

1. Display the **User list** by selecting Users from the **Setup/Maintenance menu**.

2. Click on the **User** that you wish to edit.
3. **Right click** on the **username**.
4. Select **Reset Password**.
5. Enter the **new password**.
6. **Confirm** the new password. This must be identical to the password entered in 5.
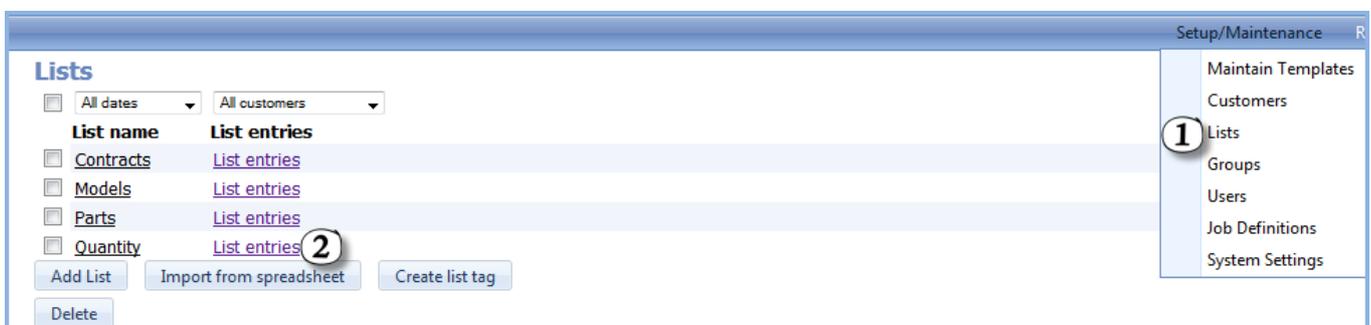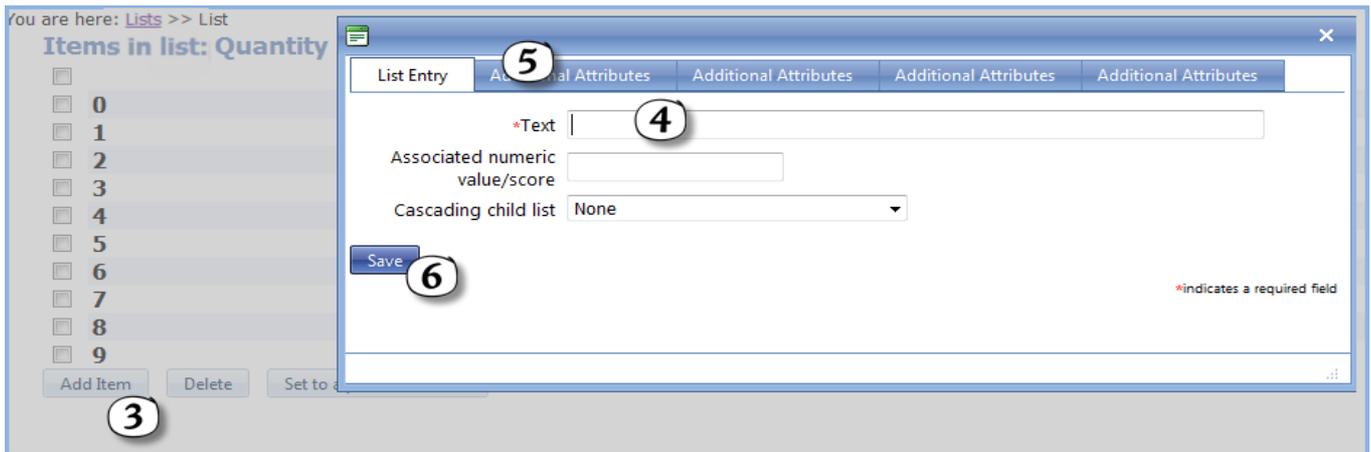7. **Save**.

3 Lists

3.1 Adding a List

1. Display the **list of Lists** by selecting Lists from the **Setup/Maintenance menu**.
2. Click on the **Add List** button.
3. Enter a **Description** (mandatory). This is enough to create a straightforward list.
4. For complicated lists, specific types of information can be associated with items in a list. These are set up in the Additional Attributes tab - this is not essential and is only recommended for advanced users doing specific tasks (see Technical Documentation for full details).
5. **Save**.
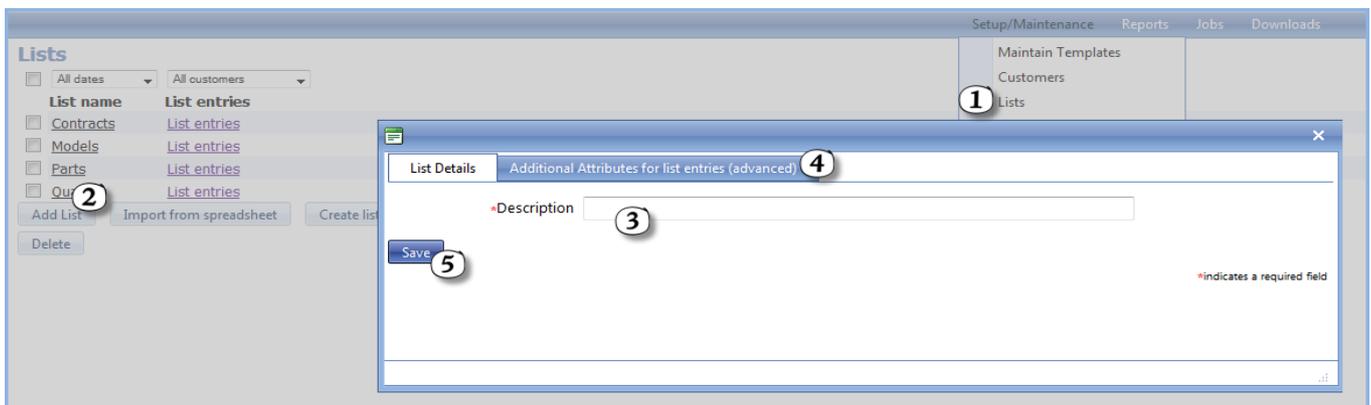
3.2 Adding a List Entry

1. Display the **list of Lists** by selecting Lists from the **Setup/Maintenance menu**.
2. Click on the **List entries** link next to the list you wish to add to. If necessary, create a new list using Adding a List.
3. Click **Add Item**.
4. Enter the **Text** that is to appear in the list, eg the quantity number or the part code.
5. For complicated lists, any additional information is added in the Additional Attributes tabs - this is not essential and is only recommended for advanced users.
6. **Save**.

3.3 Create a Cascading List

💡 Creating a cascading list is an **advanced** task. It may be easier to understand using the spreadsheet method.

Identify which is the **TOP** level or **PARENT** list. This might be a list of manufacturers or product types. In our example it is Quantity in Tens.

Identify which is the **BOTTOM** level or **CHILD** list. This is likely to be the product itself. In our example it is Quantity

For cascades with more than 2 lists, **create pairs from the bottom up** and **always enter the child first** so that it can be selected from the parent.

1. Display the **list of Lists** by selecting Lists from the **Setup/Maintenance menu**.
2. Click on the **List entries** link next to the list you wish to use as the **CHILD** list. If necessary, create a new list using Adding a List.
3. Click on **Add Item**.
4. Enter the **Text** that is to appear in the list, eg the quantity number or the part code.
5. For complicated lists, any additional information is added in the Additional Attributes tabs - this is not essential and is only recommended for advanced users.
6. **Save**.
7. Repeat steps 3-6 for all items in the list.
8. **Return** to the list of Lists by click the link Lists.
9. Click on the **List entries** link next to the list you wish to use as the **PARENT** list. If necessary, create a new list using Adding a List.
10. Click on **Add Item**.
11. Enter the **Text** that is to appear in the list, eg the quantity number or the part code.
12. **Chose the list selected in step 2** from the drop-down list at Cascading child list
13. For complicated lists, any additional information is added in the Additional Attributes tabs - this is not essential and is only recommended for advanced users.
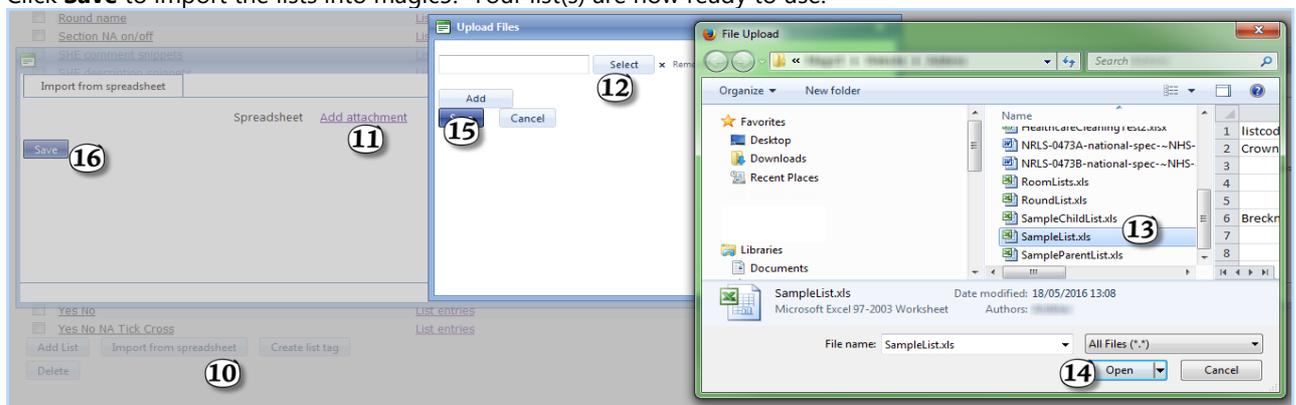14. **Save**.
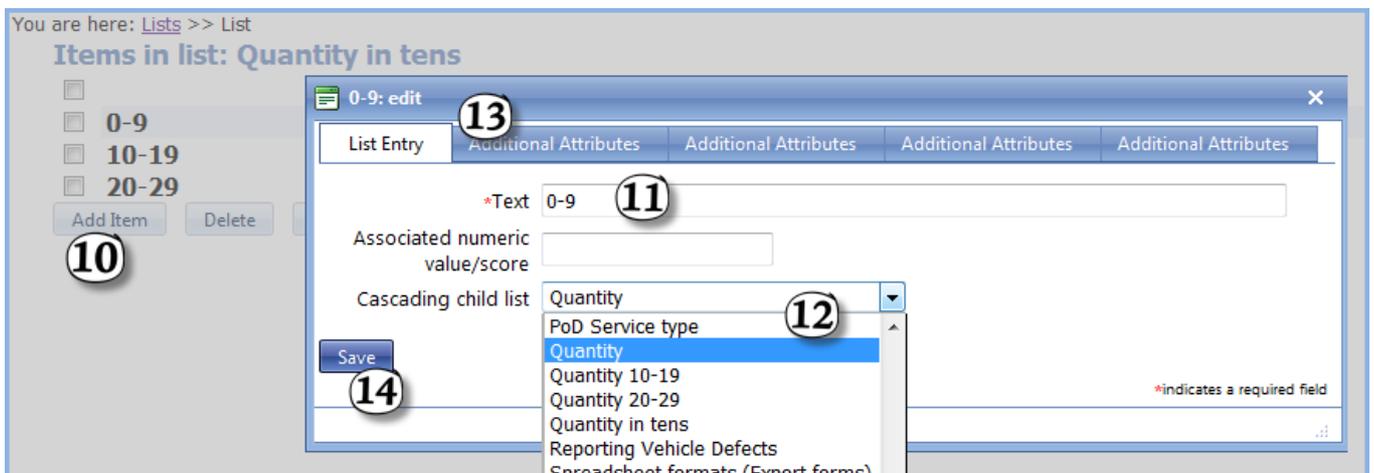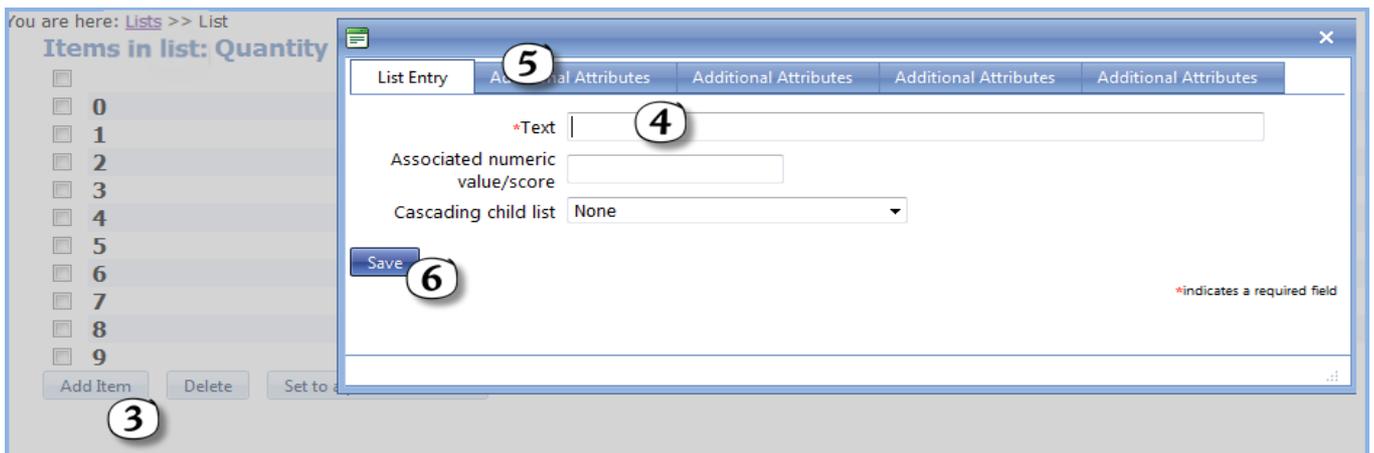
3.4 Importing a List

1. Open or download the **sample spreadsheet ('SampleList.xls' in the on-line documentation)**. <u>Do not</u> **overwrite row 1**.
2. Start entering list details on row 2 with a **listcode**. This can be a short version of the list name.
3. Enter a meaningful **list name**.
4. Leave **listentrycode** blank unless you are linking to a 3rd party system and need to match up list items.
5. Enter the **list item** itself. This is the text that the device user will select from a drop-down list, multiple-choice field, etc.
   You may wish to copy and paste this from an existing spreadsheet or csv file created by a 3rd party system (eg product list).
6. **Repeat step 5** (and step 4 if used) for all **list items** in the list entered in step 3.
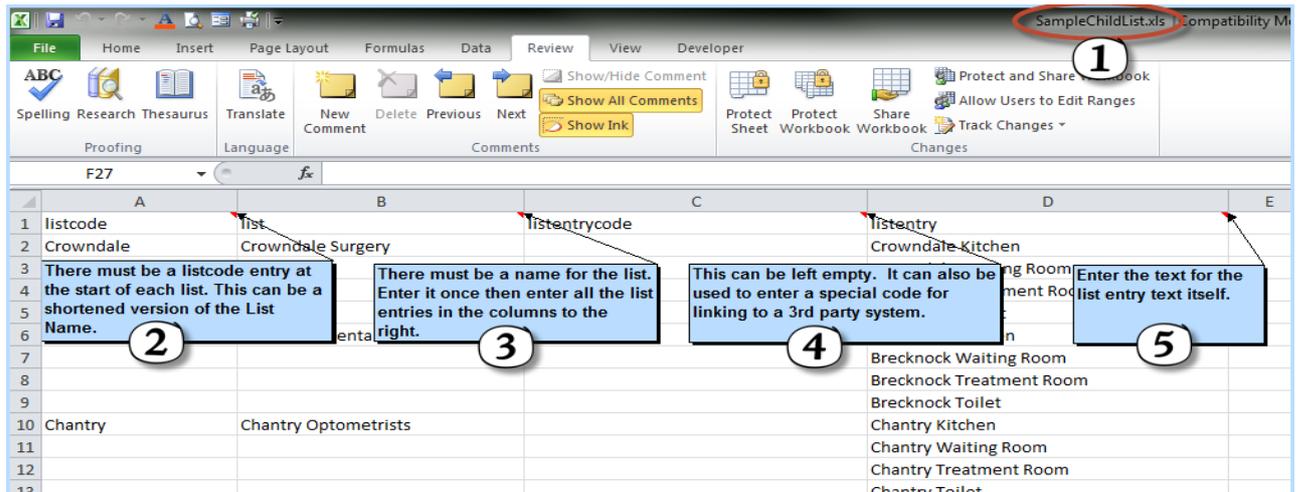7. **Repeat steps 2 to 6** for each list. **Save**.

8. Log in to magic5.
9. Select Lists from Setup/Maintenance menu (or Setup/Maintenance->Settings menu).
10. Click on the **Import from spreadsheet** button at the bottom of the list of lists.
11. Click on **Add attachment** in the dialogue box that has opened.
12. Click the **Select** button to open the file selection dialogue box.
13. Select the required file from your computer in the usual way.
14. Click the **Open** button and the filename should appear in the box.
15. Click **Save** to save the file.
16. Click **Save** to import the lists into magic5. Your list(s) are now ready to use.

3.5 Importing a Cascading List

1. Open or download the **child spreadsheet ('SampleChildList.xls' in the on-line documentation)**. <u>Do not</u> **overwrite row 1**.
2. Identify the **lowest level** in your cascading list and enter the first **listcode** in row 2. This can be a short version of the list name.
3. Enter a meaningful **list name**.
4. Leave **listentrycode** blank unless you are linking to a 3rd party system and need to match up list items.
5. Enter the **list item** itself. This is the text that the device user will select from a drop-down list, multiple-choice field, etc.
   You may wish to copy and paste this from an existing spreadsheet or csv file created by a 3rd party system (eg product list).
6. **Repeat step 5** (and step 4 if used) for all **list items** in the list entered in step 3.
7. **Repeat steps 2 to 6** for each **lowest level** list. **Save.**

8. Log in to magic5.
9. Select Lists from Setup/Maintenance menu (or Setup/Maintenance->Settings menu).
10. Click on the **Import from spreadsheet** button at the bottom of the list of lists.
11. Click on **Add attachment** in the dialogue box that has opened.
12. Click the **Select** button to open the file selection dialogue box.
13. Select the required file from your computer in the usual way.
14. Click the **Open** button and the filename should appear in the box.
15. Click **Save** to save the file.
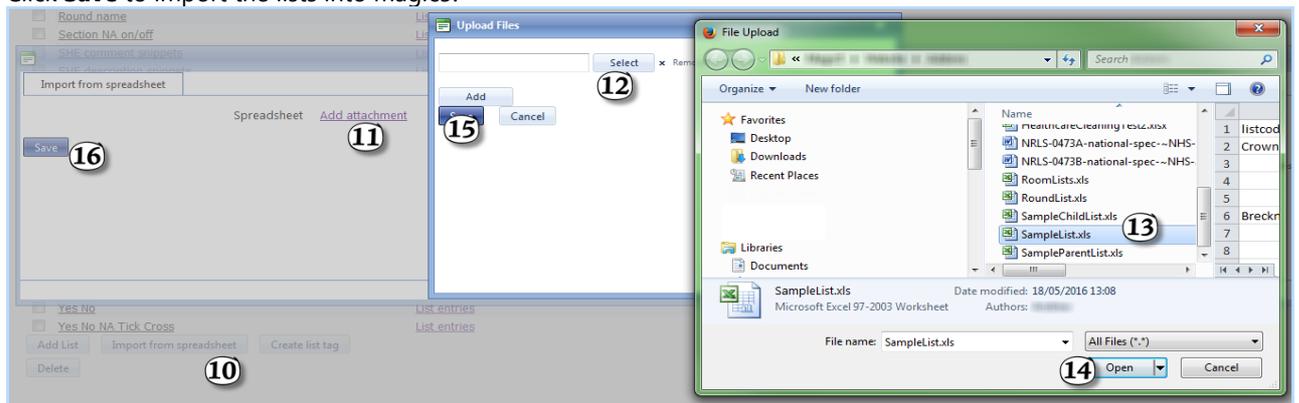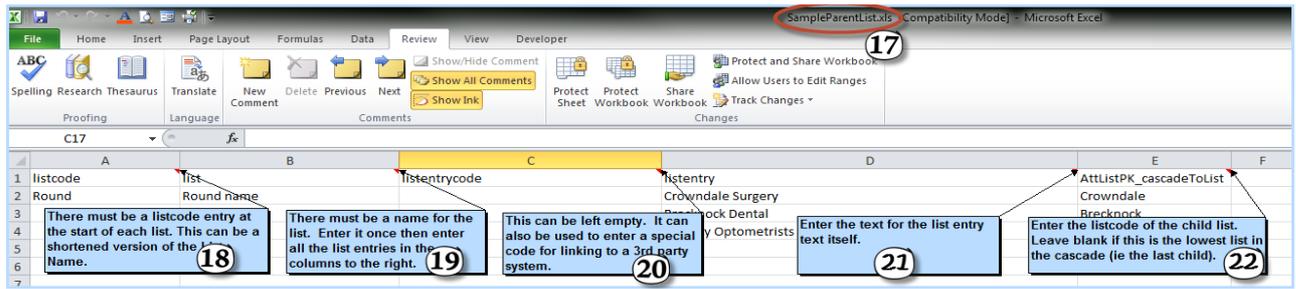16. Click **Save** to import the lists into magic5.

17. Open or download the **parent spreadsheet ('SampleParentList.xls' in the on-line documentation)**. <u>**Do not overwrite row 1**</u>.
18. Identify the **next level** in your cascading list and enter the first **listcode** in row 2. This can be a short version of the list name.
19. Enter a meaningful **list name**.
20. Leave **listentrycode** blank unless you are linking to a 3rd party system and need to match up list items.
21. Enter the **list item** itself. This is the text that the device user will select from a drop-down list. You may wish to copy and paste this from an existing spreadsheet or csv file created by a 3rd party system (eg product list).
22. Enter the **listcode** of the **child list** created in steps 1-16 that you wish to be shown to the device user when they select this item from the drop-down list.
23. **Repeat step 5** (and step 4 if used) for all **list items** in the list entered in step 3.
24. **Repeat steps 2 to 6** for each list **on this level**.   **Save**.

The spreadsheet shows the following column headers and annotations:

	A	B	C	D	E	F
1	listcode	list	listentrycode	listentry	AttListPK_cascadeToList	
2	Round	Round name		Crowndale Surgery	Crowndale	
3				Brecknock Dental	Brecknock	
4				y Optometrists		
5						
6						
7						

Callout 18: There must be a listcode entry at the start of each list. This can be a shortened version of the list Name.

Callout 19: There must be a name for the list. Enter it once then enter all the list entries in the columns to the right.

Callout 20: This can be left empty. It can also be used to enter a special code for linking to a 3rd party system.

Callout 21: Enter the text for the list entry text itself.

Callout 22: Enter the listcode of the child list. Leave blank if this is the lowest list in the cascade (ie the last child).

25. Do **steps 8-16** to upload this spreadsheet to magic5.
26. Repeat steps 17-25 for higher levels in the cascading list.