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# 1 Maintenance

## 1.1 Import a job sheet

### Before you start

This option imports data from a spreadsheet and places it in the job queue

1. **Is this an effective way of operating?** All jobs in a spreadsheet are imported for the specified customer and location, regardless of any customer names on the list. If you do not receive bulk orders from a single customer for a single location this may not be the best way to do this.
2. **Do you have existing job data spreadsheet(s)?** Identify and open these before you start.
3. **Are different spreadsheets to be imported to the same job definition?** These steps guide you through using just one, but more than be used either by creating a list entry for each or by using the same format for both (ie the same order of columns). Different job definitions can be selected during the import process.
4. **Do you have more than one job for each customer/location?** The customer and location are specified during import, so if each customer location has only one job this is not the most efficient way of operating.

### Why would I import an Excel spreadsheet of job data?

1. Because a particular customer sends a list of jobs for a particular site in this format and it is preferable to re-entering by hand.
2. Because simple data entry may lend itself to row by row entry for single (or few) customer locations. These would need to be separated into customer location specific spreadsheets.
3. Because staff logging service calls do not have access to magic5.
4. Because job data is repetitive and can be pasted into the spreadsheet to prevent duplicating data entry. Please note that this may also be resolved with careful **job definition (on-line documentation)** set up.

### Overview of process

1. **Step 1. Open the original Excel spreadsheet**
2. **Step 2. Create a job definition into which the job data will be imported**
3. **Step 3. Create a list called 'Spreadsheet formats (Jobs)'**
4. **Step 4. Create entries in this list**
5. **Step 5. Import the job data from the spreadsheet**

### Step 1. Open the original Excel spreadsheet

1. Open your **Excel spreadsheet** which might look something like this:

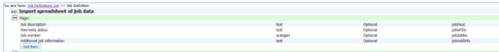
Job Datasheet		Rainbow Elementary School		magic5 Software 199 Wells Road, Bristol BS4 2DQ 0117 9712050 www.magic5software.com		
Date	Operative	Job description	HO contact	Warranty status	Job number	Additional job information
25-Jan		Dishwasher	Peter Jones	1 year	10001	Recall from last week
26-Jan		Oven	Peter Jones	2 year	10002	Potential for warranty cover
27-Jan		Cooling system	Peter Jones	3 years	10003	Contract covers parts not labour
28-Jan		Refrigeration	Peter Jones	not covered	10004	
28-Jan		Heating system	Peter Jones	lifetime	10005	Contract is with the local authority
28-Jan		Heating system	Peter Jones	lifetime	10006	Contract is with the local authority
29-Jan		Heating system	Peter Jones	1 year	10007	

2. If you do not currently have a spreadsheet please read through this guide before creating one so that

you can optimise the design.

## Step 2. Create a job definition into which the job data will be imported

1. **Create** a suitably named **job definition** (ie better than mine!) with an appropriate associated template (**get help ('Job definition - create' in the on-line documentation)**).
2. **Add items** (**get help ('Job definition - page item (create/amend)' in the on-line documentation)**) that correlate with the data columns that will be imported from your spreadsheet. For example, the job definition below will receive data from the spreadsheet shown in step 1. Job data such as date, customer and location are automatically included in the job definition.

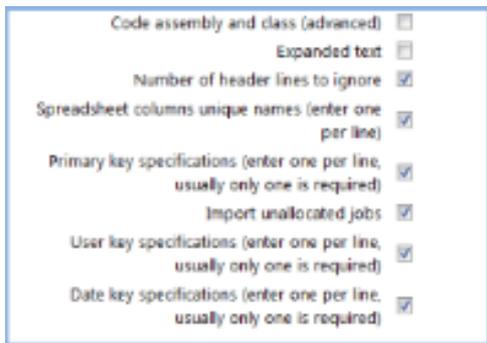


Job ID	Date	Customer	Location	Job Name
101	12/12/17	ABC	XYZ	Job 1
102	13/12/17	DEF	ABC	Job 2

3. Further items and actions not related to the spreadsheet can be added as required.
4. Make a note of the unique names relating to the import data (or leave this screen open for reference).

## Step 3. Create a list called 'Spreadsheet formats (Jobs)'

1. **Create a list** (**get help ('Create list' in the on-line documentation)**) with the title **Spreadsheet formats (Jobs)**. The **exact name** is important.
2. In the **'Additional Attributes for list entries'** tab, tick the boxes illustrated below.



Code assembly and class (advanced)

Expanded text

Number of header lines to ignore

Spreadsheet columns unique names (enter one per line)

Primary key specifications (enter one per line, usually only one is required)

Import unallocated jobs

User key specifications (enter one per line, usually only one is required)

Date key specifications (enter one per line, usually only one is required)

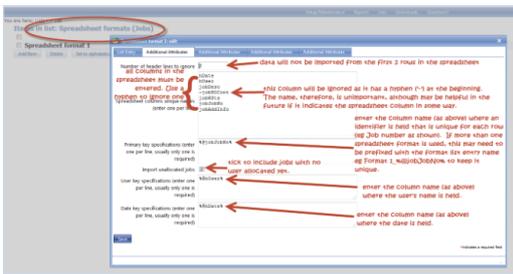
3. **Save.**

## Step 4. Create entries in the list

1. **Add a list entry** (**get help ('List entries' in the on-line documentation)**) for each spreadsheet format you will be using (making the title more meaningful than mine!).
2. Open the **Additional Attributes** tab.
3. In **Number of header lines to ignore**, enter the number of rows on the spreadsheet that do not have data that you wish to import (eg logo, company address, headings).
4. In **Spreadsheet columns unique names** enter the corresponding unique names from the job definition.

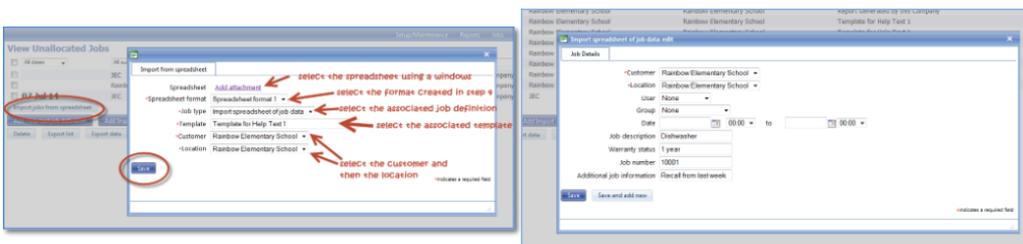
If there are columns in the spreadsheet that you do not wish to appear in the job details, prefix them with a hyphen ('-') and enter any name (it is recommended to use something meaningful for future reference). These must be included as 'placeholders' so that subsequent data items appear in the correct place.

5. In **Primary key specifications** enter the name (as in step 4) of the column that holds a unique identifier for each row (such as Job Number). If more than one list entry is being created (ie there is more than one import format) it is recommended that this is prefixed with some text (eg the name of the format) to maintain uniqueness between imports (for example, using my not-very-meaningful-name, 'Format 1\_#@jobJobNo%' (without quotes)).
6. Tick the **Import unallocated jobs** box avoid losing any jobs while getting underway. It can be changed at a later date.
7. In **User key specifications** enter the name of the column in the spreadsheet where the user (or operative) is stored.
8. In **Date key specifications** enter the name of the column in the spreadsheet where the date is stored.
9. Save.



## Step 5. Import the job data from the spreadsheet

1. Open the jobs list (unallocated or outstanding) and click the **Import jobs from spreadsheet** button.
2. Click the **Add attachment** link to select the required spreadsheet from your local folders.
3. Select the required **Spreadsheet format** from the drop-down list. This will be the one(s) created in **step 4**.
4. Select the associated **Job type** (as created in **step 2**).
5. Select the associated **Template**. This should be the same as the Associated template selected in the Job definition.
6. Select the **Customer** and **Location** for whom you are importing job data (the location will be populated once the customer has been selected).
7. **Save** to start the import.
8. When the screen has refreshed (indicated by your browser 'wait' icon) you should see the new items in your **job list**. It is recommended that you **check** these until you are confident that the import is set up correctly as incorrect set up may appear to work but omit rows (for example, if the number of rows to ignore is incorrect).



## 1.2 Move a template component

### Before you start

**magic5 recommends always taking a copy of a template before making changes** (see step 1 below).

1. **Do you wish to simply duplicate?** A template component can be duplicated which creates a copy immediately beneath the original and retains the original.
2. **Can you move the item by rearranging the section?** Click on the link to the right of the web page and drag the items in to the required order.
3. You will need to **make a note** of the unique name of the original item - existing data become irretrievable without it.

### Why would I move an item?

1. To improve flow of data collection for your device users
2. To improve the order of information on your reports
3. To de-clutter frequently used pages
4. To split one page into two

### Overview of process

1. **Step 1. Create a copy of your template**
2. **Step 2. Copy the item to move**
3. **Step 3. Paste the item in the new location**
4. **Step 4. Delete the old item**
5. **Step 5. Change the unique name**

### Step 1. Create a copy of your template

1. In the Template list, right click on the template you wish to amend and select 'Duplicate'.



2. Click on the newly created template (called "Copy of " followed by the original name) to change the name to something useful such as " [original name] old" or, if this happens more than once you may wish to include the date or month or reason for change.

### Step 2. Copy the item to move

1. **Open the template** that you wish to amend by clicking on it.
2. Identify the template component that you wish to move, opening or closing areas with the plus and minus signs if necessary, and right-click on it to bring up the context menu.

3. Select **copy** from the context menu.



### Step 3. Paste the item in the new location

1. Identify the **heading of the area** that you wish the template component to now be held in and right-click on the name to bring up the context menu.
2. Select **Paste** from the context menu and the copied item will appear **at the bottom** of the list of items.



3. Use the **rearrange** link on the right of the page to move the new template component into position if necessary.

#### Step 4. Delete the old item

1. Return to the **original template component** and click on it to open it.
2. Make a note of the unique name which will either be on the front/Main tab or the Advanced tab. Close without saving.
3. Return to the **original template component** and right-click on the name to bring up the context menu.
4. Select **Delete** from the context menu and you will be asked to confirm that you wish to permanently

delete the template component.



#### Step 5. Change the unique name

1. Return to the **new template component** and click on it to open.
2. Locate the unique name which will either be on the front/Main tab or the Advanced tab. Change it to the original unique name noted down in step 4.
3. Save.
4. After amending the template the device will need to **Receive Updates** ('Device menu' in the **on-line documentation**) for these changes to be incorporated.

## 1.3 Set up a customer

### Before you start

1. **Do you have a list of customers that you wish to use?** If it is a long list you may prefer to populate a spreadsheet which can be uploaded directly into magic5. See below for more information.
2. **Do you have locations details for all of your customers?** All customers need at least one location
3. **Do you wish to organise your customers and users into categorised groups?** A user and a customer must be in the same group to fill in forms and view reports - this can be a single group for everyone or can be broken down into a number of smaller ones.

### Why do I need to set up all this stuff?

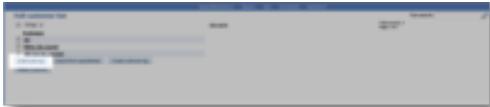
1. magic5 requires a customer to be set up for the form to relate to.
2. All **customers** must have at least one **location**.
3. Each **customer** must have a **template** associated with it.
4. Every **customer** must be part of a **group**.
5. Every **user** must be part of the **same group** as the customer whose forms and reports they need to access. This applies to both device users and customer users.

### Overview of process

1. **Step 1. Create your customer**
2. **Step 2. Add a location to your customer**
3. **Step 3. Add a template to your customer**
4. **Step 4. Add your customer to a group**
5. **Step 5. Ensure that your user is part of the same group**
6. **Step 6. Receive the updated customer(s) onto your device**

### Step 1. Create your customer

1. In the **Setup/Maintenance** menu, select Customer and click 'Add New'.



2. **Customer name** is the only essential item, but an address might be useful along with notes on the second tab which will appear server-side and device-side respectively (such as 'level 3 engineer required' or 'phone 01234 567890 for access to building'). Sage code is for linking to third party

software which is a bespoke option.



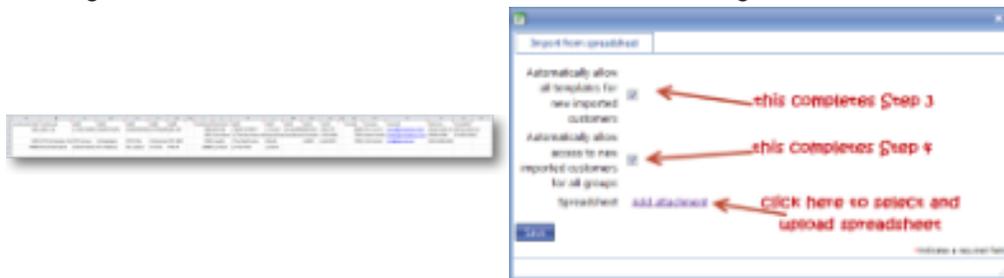
3. **Save** the customer details.
4. If you have a **large number of customers** you may wish to enter the details on a spreadsheet and upload them. magic5 requires a very specific format for the spreadsheet which can be downloaded

here ('Sample Customer File with Contacts - General.xls' in the on-line documentation). Columns A-G refer to the customer, Columns I-O refer to one or more locations and Columns Q-U refer to the contact for that location. Do not remove the headings (ie Row 1). Once it has been prepared, click the 'Import from spreadsheet' button. You will be asked to add the saved spreadsheet from your files and to chose whether or not to:

1. **Automatically allow all templates for new imported customers** - this will automatically fulfill step 3
2. **Automatically allow access to new imported customers for all groups** - this will automatically fulfill step 4

Step 2 will always be automatically fulfilled, providing that location details have been entered on the spreadsheet.

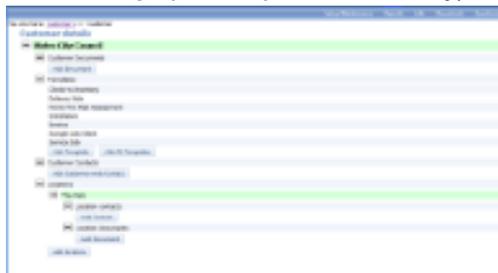
Please use this facility with care and be aware that existing customers may be overwritten. Also, although individual items *can* be amended, mistakes often go undetected.



## Step 2. Add a location to your customer

1. **Click on your customer** (after setting up in Step 1 if necessary) to see the attachments list and click

the 'Add location' button.

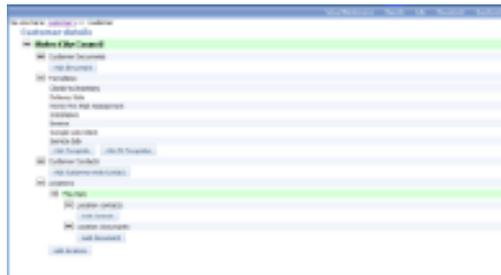


2. **Location name** is the only essential item but the address, notes and site code might be useful. There is also a 'Region or location group' drop-down list that operates in addition to the groups outlined below - see **Attachments for a customer (on-line documentation)** and **Concepts - Groups (on-line documentation)** for more information.
3. **Save** the customer details.
4. Location contacts and location documents can also be added. Be aware that a distinction is made between customer-wide contacts and location contacts.

## Step 3. Add a template to your customer

1. From the same screen as in Step 2, click the 'Add Template' button and select the required template

from the drop-down list.



2. You may prefer to **'Add All Templates'** to this customer. The main reason for NOT doing this is to offer guidance to device users over which template to use for which customer.

### Step 4. Add your customer to a group

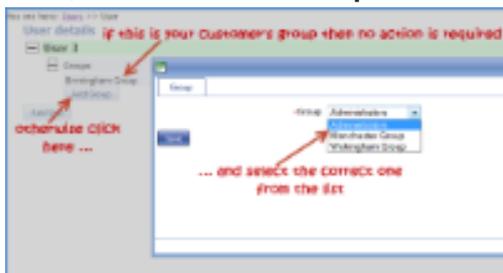
1. In the **Setup/Maintenance** menu, select **Groups**.



2. Click on **'Add Customer'** for the group to which this customer is to be added. Initially you will probably only have one called either **'Administrators'** or **'Standard'**.
3. You may prefer to **'Add All Customers'** but this enables any customers with user access to view reports to see reports from any customer within that group. It also removes the guidance that you may wish to give to device users about which customers they are dealing with.

### Step 5. Ensure that your user is part of the same group

1. In the **Setup/Maintenance** menu, select **Users** and click on the one that is to be dealing with your customer.
2. If your customer's group appears beneath the username then it has already been set up and no further action is required.
3. If not, click on the **'Add Group'** button and select the group used in Step 4 from the drop-down list.



4. **Save** and your customer is now set up.

### Step 6. Receive the updated customer(s) onto your device

1. Open magic5 on your device and the new data should be downloaded automatically.
2. If magic5 is already open or the new customer does not appear, select **'Receive updates'** from the

menu.



3. If the new customer still does not appear, check that the above steps have been carried out correctly and, particularly, that the user logged onto the device is part of the same group as the customer.

## 1.4 Set up a user to access a subset of locations

### Before you start

1. Identify the **users** who **need** to access the **locations**.
2. Identify a **meaningful name** for the **Location Group**.
3. Identify the **locations** to be **included** in the **Location Group**.

### Why would I need to associate a user to more than one location?

1. magic5 requires all **customers** to have at least one **location** and customer-wide or location **contact** may also be set up as a **user** with **access** to reports for that **customer/location**
2. However, some users may be associated with **more than one location, but not all**. For instance, the customer's regional managers may need to see several locations but be prohibited from seeing other regional manager's locations.

### Overview of process

1. **Step 1. Set up a Location Group**
2. **Step 2. Assign locations to the Location Group**
3. **Step 3. Link the Location Group to the user**

### Step 1. Set up a Location Group

1. In the **Setup/Maintenance** menu, select **Lists**.
2. Click on the list entries link next to the **Location Group** list



3. Click on **Add item**.

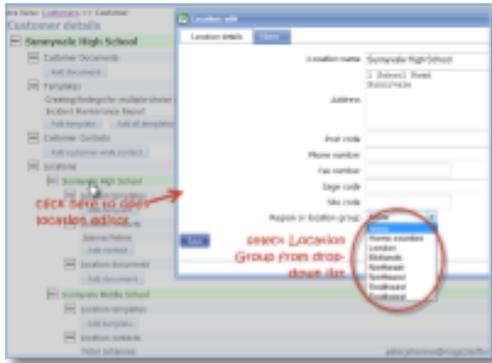


4. Give the Location Group list entry a meaningful name.
5. Repeat 3-4 for all the location subsets that you require.

### Step 2. Assign locations to the Location Group

1. In the **Setup/Maintenance** menu, select **Customers**.
2. **Select a customer.**
3. **Click on the location name.**

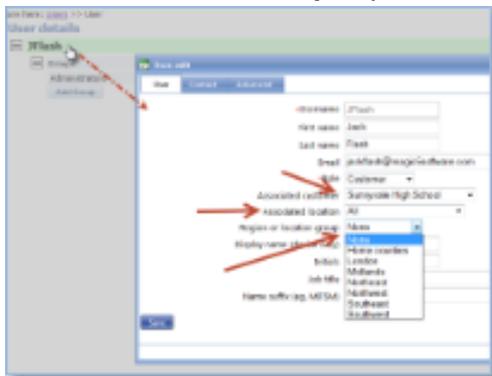
4. Select the appropriate **Location Group** from the drop-down list.



5. **Save.**
6. Repeat 3-5 for each location within a customer that needs to be handled in this way.
7. Repeat 2-6 for each customer that needs to be handled in this way.

### Step 3. Link the Location Group to the user

1. In the **Setup/Maintenance** menu, select **Users**.
2. **Click** on the required **user**.
3. **Select** the required **customer** from the *Associated customer* drop-down list. This can be left as All but this is usually applied to a customer user, so it would normally restrict access to that customer.
4. **Select All** from the *Associated location* drop-down list.
5. **Select** the **Location Group** required from the drop-down list *Region or location group*.



6. **Save.**

## 1.5 Create e-mail templates

### Before you start

1. **Draft the e-mail that you wish to use**
2. Consider which **wording** will stay the same and which will **change depending on the customer, the date, the location, etc.**
3. **Convert the wording into HTML** using your own editor
4. **Save the HTML document** using a folder where you can easily find it for future amendments.

### Why would I use HTML or text e-mail templates?

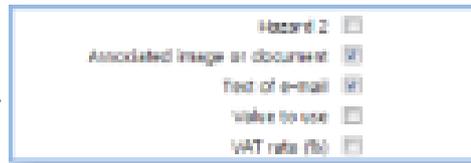
1. magic5 can insert form specific information into an e-mail template, such as customer, location, date, etc using dynamic values.
2. A text e-mail is always recommended as some e-mail recipients do not accept HTML e-mails.
3. HTML e-mails, however, enable advanced formatting that is unavailable in text e-mails.

### Overview of process

1. **Step 1. Create your HTML template List**
2. **Step 2. Insert dynamic values into the e-mail template**
3. **Step 3. Add HTML templates to the list**

### Step 1. Create your HTML template List

1. In the **Setup/Maintenance** menu, select Lists and click the 'Add List' button.
2. Enter a **Description** of 'E-mail templates'.
3. Click on the **Additional Attributes for list entries (advanced)** tab.
4. Tick the box next to **Associated image or document**.
5. Tick the box next to **Text of e-mail**.
6. **Save.**



### Step 2. Insert dynamic values into the e-mail template

1. **Open the e-mail** created above in your usual HTML or text editor.
2. Insert report processing variables and other dynamic values where appropriate in the document.
3. **HTML templates MUST have angled brackets (< and >)** around the dynamic values. For example <%CUSTOMER%> at <%LOCATION%>
4. **Text templates should not have these** (see below).

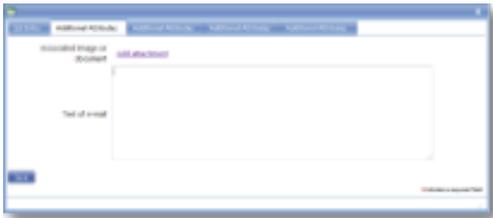




5. **Save.**

### Step 3. Add HTML templates to the list

1. In magic5 click on '**list entries**' for the **E-mail templates** created in Step 1.
2. Click on **Add item**.
3. In the **List Entry** tab enter **Text** to identify the email in the future (this has no other function) and leave the other prompts blank.
4. In the **Additional Attributes** tab click on **Add attachment** to **upload** the **HTML** e-mail template created in step 2 (if used).
5. **Open** the **HTML** (if used) in your **browser**, ensuring that the dynamic values are visible. **Select All** and **Copy** to the clipboard.
6. **If not using HTML, copy the text created in step 2** to the clipboard.
7. **Paste** the contents of the clipboard into the box titled **Text of e-mail**.



8. **Save.**

## 1.6 Set up a user

### Before you start

1. **Identify who your users are and what their roles will be** User roles include Administrators, (device) users and customers.
2. **Collect available associated information** magic5 stores work-related information only - there are no personal details such as home address or phone number. However work e-mail address and phone numbers, as well as job title and name suffix (such as professional qualification eg MIFSM) are optional items
3. **Do you wish to organise your users and customers into categorised groups?** A user and a customer must be in the same group to fill in forms and view reports - this can be a single group for everyone or can be broken down into a number of smaller ones.

### Overview of process

1. **Step 1. Create your user**
2. **Step 2. Assign your user to a group**
3. **Step 3. Edit user details**

### Why do I need to set up all this stuff?

1. magic5 requires a user to be set up in order to access either the device or the job and report pages.
2. An initial administrator will be set up on registering for magic5 but subsequent ones will need to be set up manually.
3. All users must be in at least one group.
4. Every **user** must be part of the **same group** as the customer whose forms and reports they need to access. This applies to both device users and customer users.

### Step 1. Create your user

1. In the **Setup/Maintenance** menu, select User and click 'Add user'.
2. **Username**, Password (and confirm) and Role are the only essential items, but other items, such as e-mail address and phone number, might be useful for outputting on reports or sending automated e-

mails.



3. **Save.**

### Step 2. Assign your user to a group

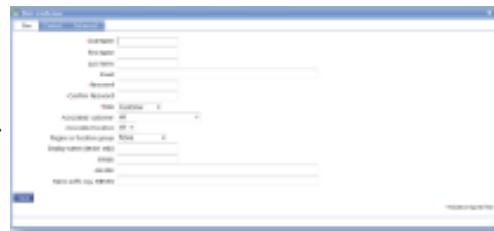
1. **Click on your user.**
2. **Click on Add Group.**

3. **Select a group** from the dropdown list. A group called 'Standard' will be set up when you register with magic5 - click [here \('Groups' in the on-line documentation\)](#) if you wish to find out more about creating further groups.

**Please note** that this group is not the same as the 'Region or location group' shown above. This group can be perceived as a conceptual group (such as administrators, auditors, supervisors, or maybe Company A, Company B, Company C) as opposed to a geographical group of, maybe, southwest, northeast, London, etc. Although either can be whatever is required, bear in mind that users (and customers) can be organised into two types of criteria.

### Step 3. Edit user details

1. From the same screen as in Step 2, click the **user name**.



2. For a full description of the user screens please see **Users (on-line documentation)** help page.