

Eaco Task Management

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INTRODUCTION

"Billions of people wonder, what am I supposed to do next? Boss, please tell me. I want to do a good job.

So, when people get to work, they're asking to be managed. Managed to do the right thing, the right work, in the right way because they want to make a contribution" - Seth Godin

One of the most challenging aspects of managing work is the pressure that comes with the compulsion to micromanage; an issue that is usually borne from a manager's fear of losing control.

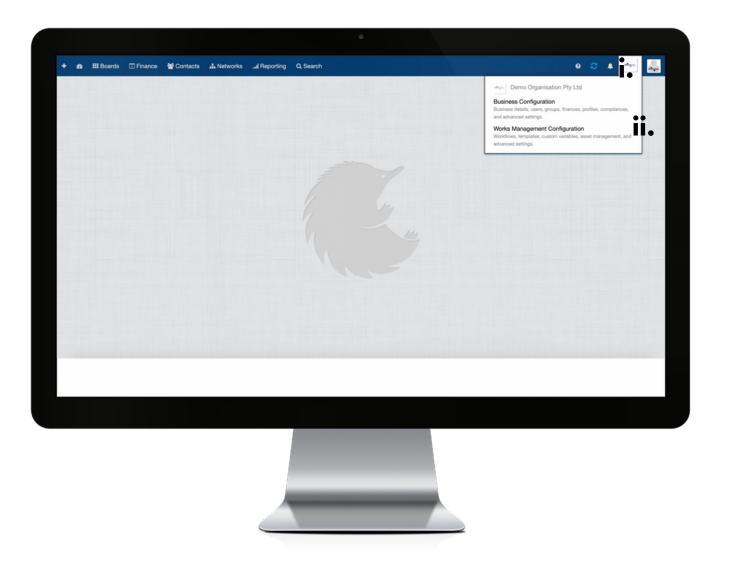
Micromanagement has long been a thorn in the side of any business. Its damaging effects, from negative impacts on productivity to soaring levels of turnover in human resources, has resulted in irrecoverable losses for far too many organisations. Yet: the requirement to ensure that specific tasks are completed correctly to meet customer expectations, cannot be discarded.

It is consequences like these that highlight how technology can invariably bridge the need to maintain robust works management practices and at the same time protect a positive working culture. To address these critical organisational needs, Eaco's software suite includes a solution, Task Management, as one of its key offerings.

The Task Management feature has been designed to arm organisations with a tool that guides their workers on how to complete specific tasks of a job to ensure customer satisfaction.

#drivingsatisfaction

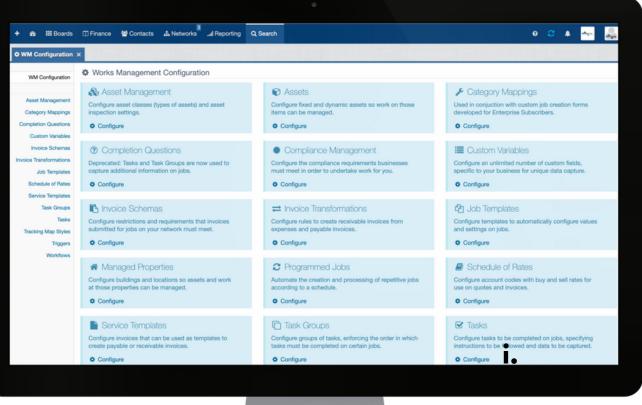
1.GET STARTED



Establish the settings for your Task Management feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

2. WM CONFIGURATION





i: To commence establishing the settings for your Task Management feature, click on Configure.

3. SETTINGS: MAIN VIEW

+ 🚓 🎫 Boards	Finance Contacts A Networks Jal Reporting Q Searce	h	0 🖸 🔺 🛶 🌉
• WM Configuration			
WM Configuration	🗹 Tasks		+ Create Task
Asset Management Category Mappings Completion Questions	Search Q Search		
Custom Variables Invoice Schemas	Name	Description	
Invoice Transformations	All components Test		
Job Templates	Battery Detail Capture for Roadside Job	If Battery Job, these tasks are mandatory	
Schedule of Rates	Battery Details		
Service Templates Task Groups	Battery Installation		
Tasks	Check in		
Tracking Map Styles	Check In: In Transit		
Triggers Workflows	Confirm Service Required	Verify the breakdown	
	Customer signoff	Please have the customer signoff	
	Dishwasher pickup		
	In Transit		
	Job Pre-start checklist		
	Job Type	Tell us the type of job you did	
	Log Rubbish Bag	Complete this for each bag dumped into the truck	
	Mandatory Photograph	Take photo before job commence	



Legend:

Name: this is the Name of the Task.

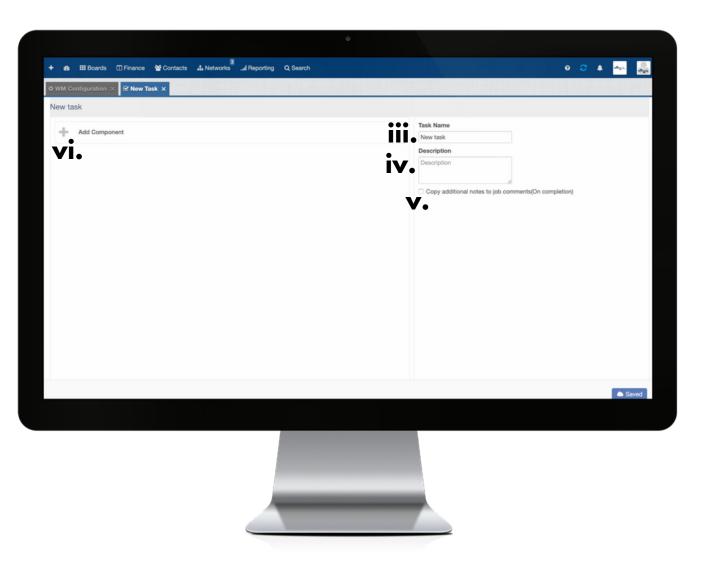
Description: describes the Task to be executed.

4. CREATE A NEW/EDIT A TASK

WM Configuration			•
WM Configuration	✓ Tasks		+ Create Task
Asset Management	Search		
Category Mappings	Q Search		
Completion Questions Custom Variables			
Invoice Schemas	Name	Description	
Invoice Transformations	All components Test		
Job Templates Schedule of Rates	Battery Detail Capture for Roadside Job	If Battery Job, these tasks are mandatory	
Service Templates	Battery Details		
Task Groups	Battery Installation		
Tasks	Check in		
Tracking Map Styles Triggers	Check In: In Transit		
Workflows	Confirm Service Required	Verify the breakdown	
	Customer signoff	Please have the customer signoff	
	Dishwasher pickup		
	In Transit		
	Job Pre-start checklist		
	Job Type	Tell us the type of job you did	
	Log Rubbish Bag	Complete this for each bag dumped into the truck	
	Mandatory Photograph	Take photo before job commence	

i: click the + icon to open the create Task dialog box; or

ii: to edit the details of an existing Task, click the name to open the Task dialog box.

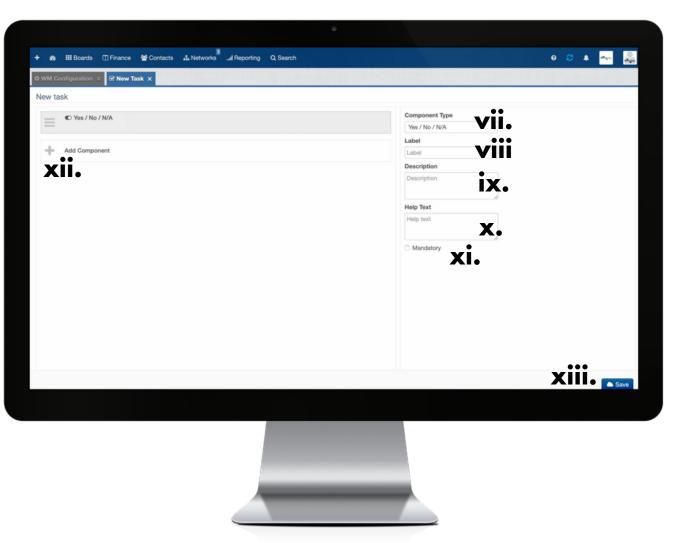


iii: complete this field to apply a Name to the Task.

iv: complete this field to describe the purpose of the Task.

v: check the box to enable the additional notes that are recorded at the time of completing the Task to attach to the job overview.

vi: click the + icon to open the Add Component dialog box (Steps 5 to 10).



Step vii: complete this field to indicate what type of result is to be recorded for completion of the Task.

Step viii: complete this field to apply a Name to the Task Component.

Step ix: complete this field to describe the purpose of the Task Component to be completed.

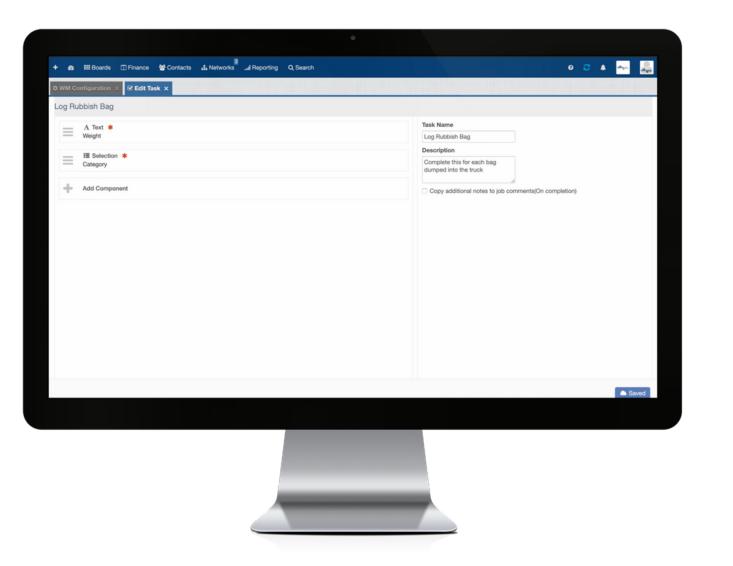
Step x: complete this field to provide additional information in relation to the Task Component to be completed.

Step xi: check this box if the Task Component is to be made mandatory for full completion of the overall Task.

Step xii: click the + icon to add another Component that is to form part of the overall Task completion.

Step xiii: click Save to apply all settings.

5. VIEW OF A CREATED TASK



6. TASK GROUPS SETTINGS: MAIN VIEW

WM Configuration	×		
WM Configuration	🗋 Task Groups		+ Create Task Grou
Asset Management Category Mappings completion Questions	Search Q Search		
Custom Variables Invoice Schemas	Name	Description	
oice Transformations	Battery Job & Roadside	Confirm service required. If Battery, Battery Details REQUIRED	
Job Templates Schedule of Rates	Demo task group	Shows task flow for demonstration purposes	
Schedule of Hates	Install fiber node	Install a new fiber node cabinet	
Task Groups	New task group		
Tasks	Plant Maintenance	Required Tasks for Plant Maintenance Group	
Tracking Map Styles	Roadside Job		
Triggers Workflows	Rubbish Collection		
	Test Task Group		
	Towing Chain of Custody	Tracks who is responsible for a towed vehicle	
	Towing Job		
	First Prev 1 2 Next Last		

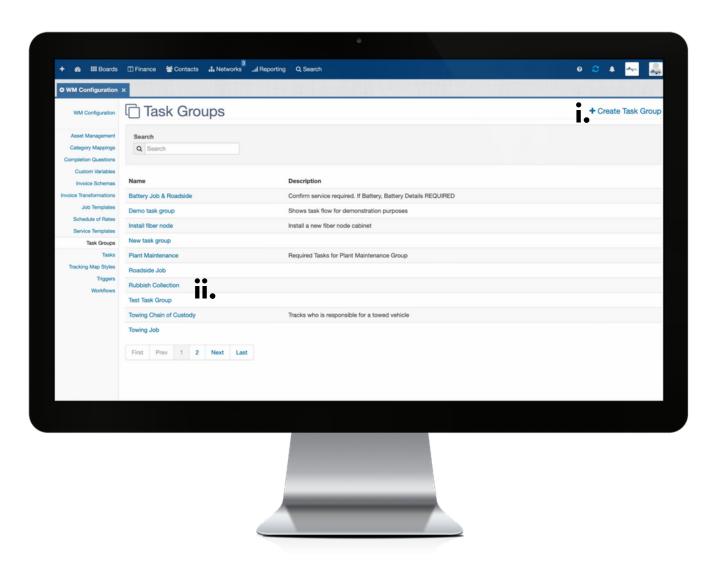
Legend:

Name: this is the Name of the Task Group.

Description: describes the Task Group to be executed.

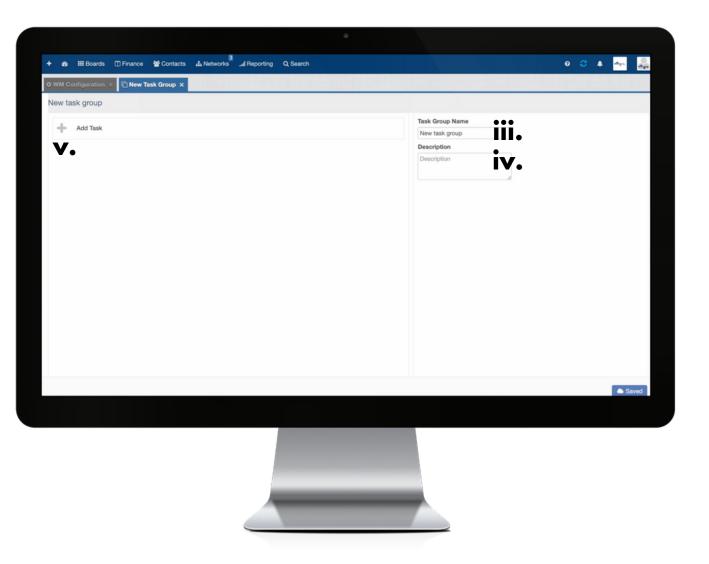
7. CREATE A NEW/EDIT A TASK GROUP





i: click the + icon to open the create Task Group dialog box; or

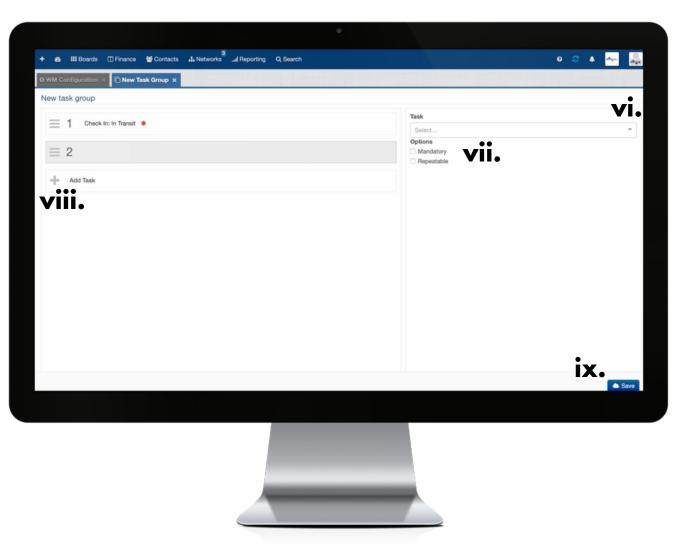
ii: to edit the details of an existing Task Group, click the name to open the Task Group dialog box.



iii: complete this field to apply a Name to the Task Group.

iv: complete this field to describe the purpose of the Task Group.

 $\mathbf{v}:$ click + icon to Add a Task to the Task Group and then move on to Step vi.



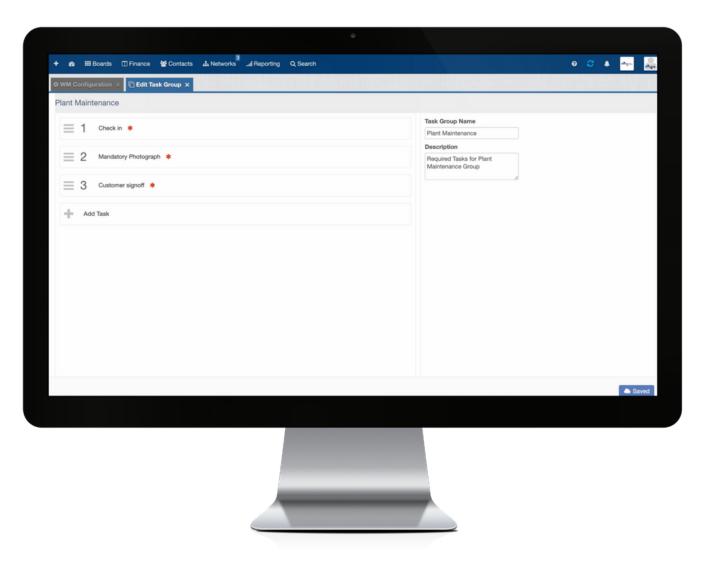
vi: upon clicking Add Task, use this drop down menu to select which Task to add to the Task Group from your list of Tasks. Once added, the Task will appear in numbered order as seen in the top left of this screen.

vii: check boxes here enable you to establish whether the Task should be Mandatory and/or Repeatable.

viii: repeat Steps v to vii to continue adding more Tasks to the Task Group.

ix: click Save to confirm attachment of Tasks to the Task Group.

8. VIEW OF A CREATED TASK GROUP



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