



RESOURCE CENTRE USER GUIDE

QUICK REFERENCE PDF



Hello, ABC Widgets Ltd.

Please select an option from the dashboard below, or from the navigation above

REQUESTS

REQUEST A JOB

REQUEST A QUOTE

JOB

5110

3780

3667

10/28/2016

05/20/2016

05/05/2016

Completed

Completed

Completed

EQUIPMENT

10 Items

VIEW EQUIPMENT

MAINTENANCE

You have 1 Active Contract
25946

11/01/2016

INVOICES & CREDITS

10/25/2016

Maintenance

09/12/2016

Main

Cl

M



Hello

This user guide has been put together to help you to access and use the key features of the Salix Resource Centre...



Site
Access



Dashboard
and Navigation



Job
History



Equipment
Inventory



Maintenance
Contracts



Invoice
and Credits



Job
Requests



Reports
Suite

Our specialist team of experts are only a phone call away.
If you get really stuck, call us and we'll be happy to help you.

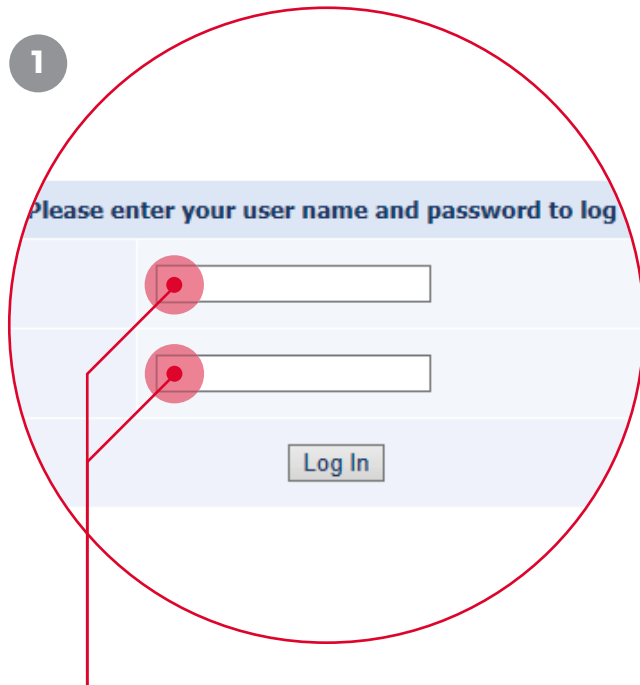
0845 177 1750



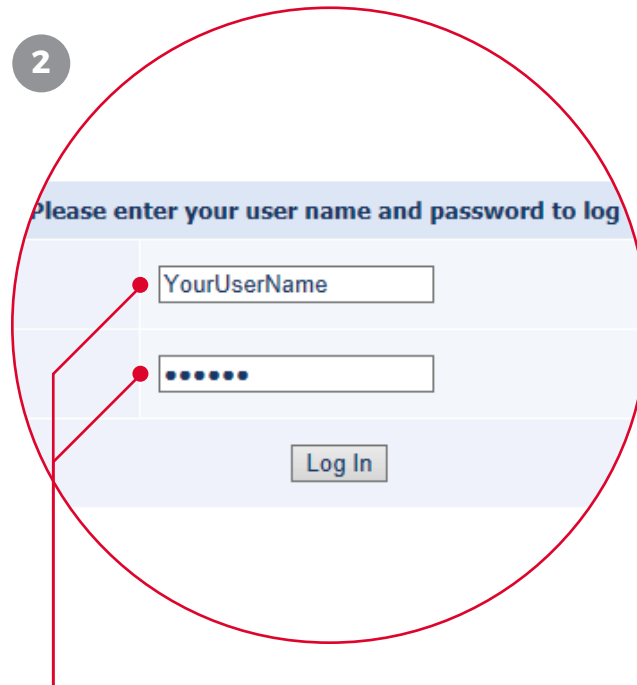
Site Access

Log In

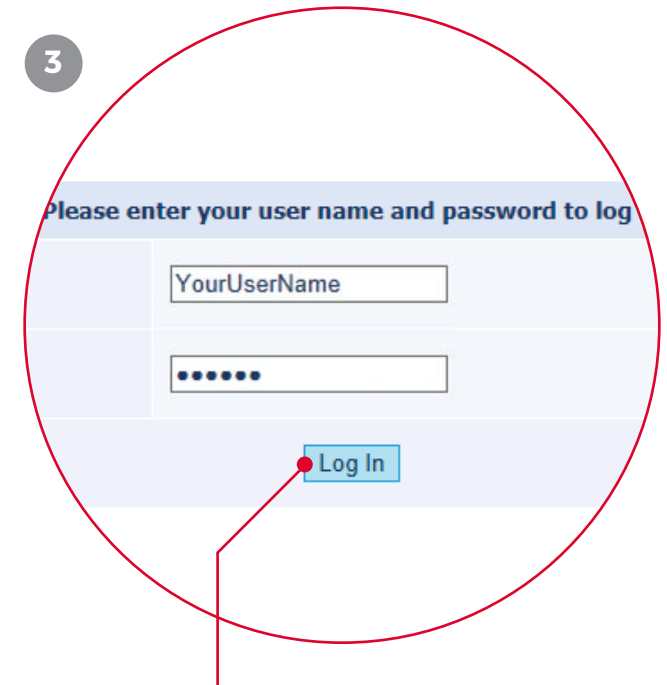
To access the Salix Resource Centre simply enter your User Name and Password...



Type your User Name, followed by your Password.



Which will look something like this, once you're done.



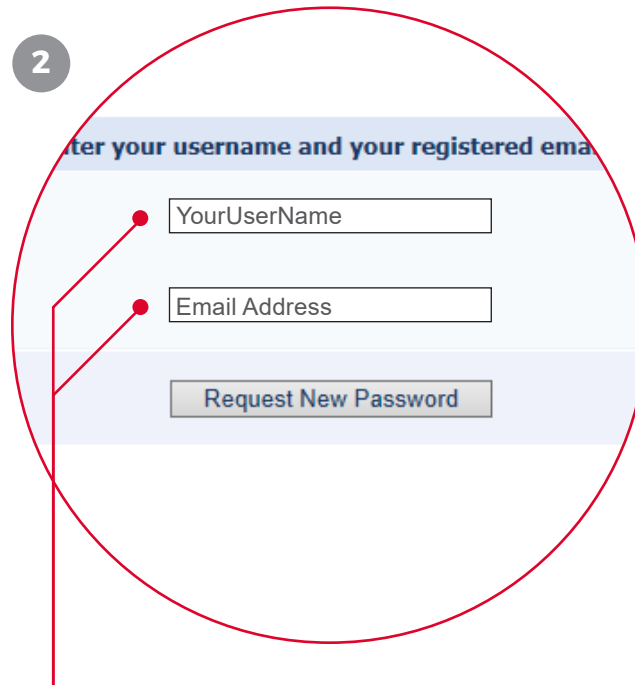
Hit Log In. You will then be taken to your account page.

Forgot Password?

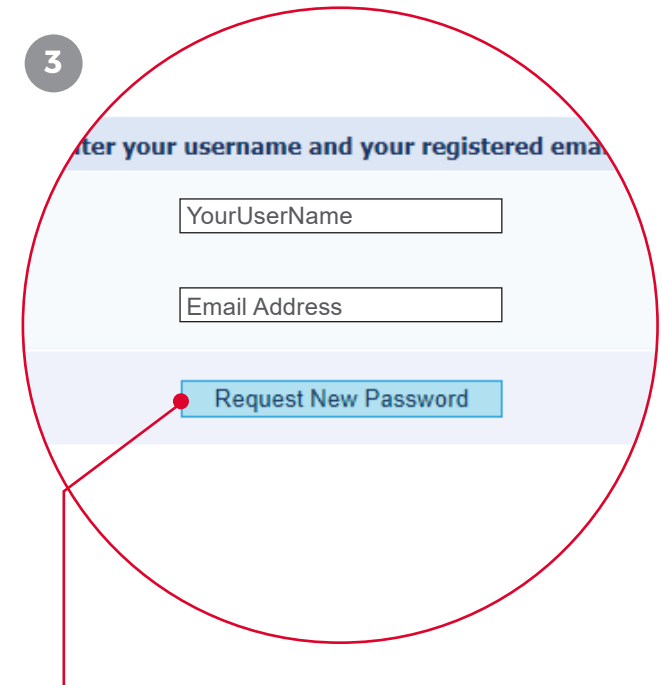
If you've forgot your Password, simply click the link below the **Log In** button...



If you can't remember your Password, click on the link directly below Log In.



Follow the on-screen instructions. Enter your User Name & Email Address.



Hit Request New Password and you'll be issued with a new password.



Dashboard and Navigation



The Dashboard

The Salix Resource Centre has everything you need at your finger tips...

1 JOBS

A filtered list of report logs for all your Jobs.

2 EQUIPMENT

A searchable list of all of equipment you own and also any equipment that you have on hire or rental.

3 MAINTENANCE CONTRACTS

A list of all your contracts.

4 INVOICES AND CREDITS

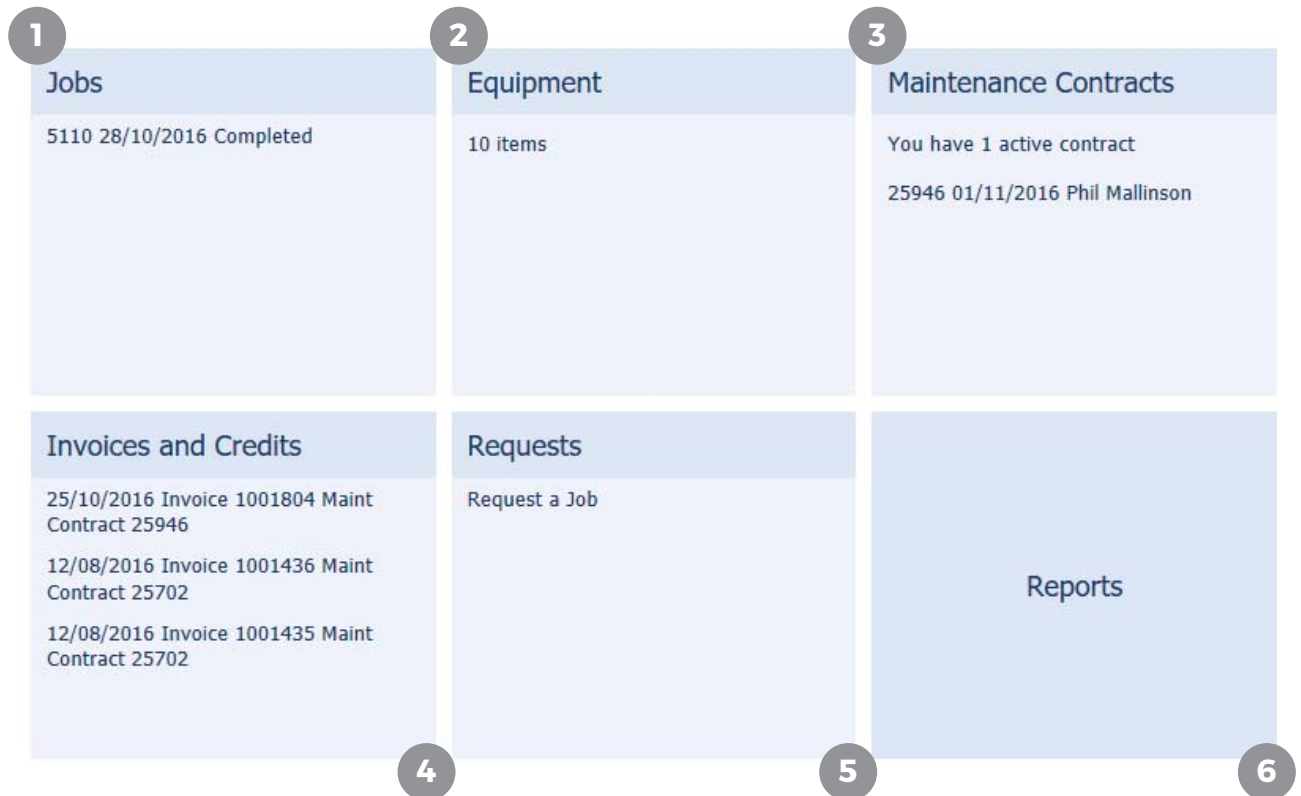
All of your invoices and credit notes.

5 REQUESTS

A contact form which allows you to initiate on-site work requests.

6 REPORTS

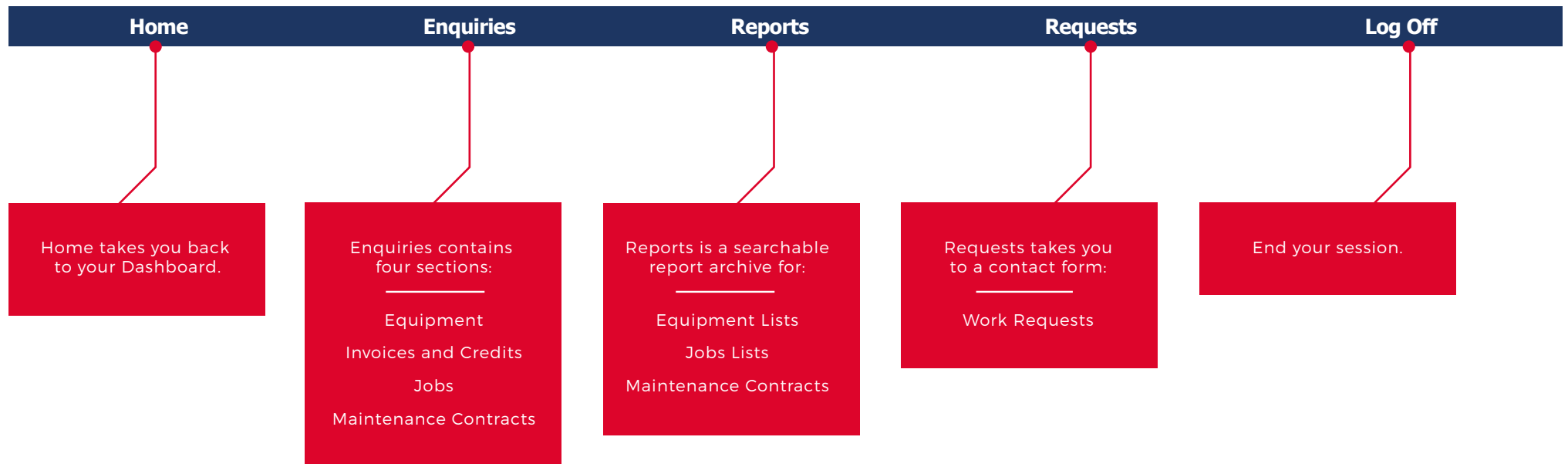
A searchable archive of Equipment Lists, Job Lists and Maintenance Contracts.





Site Navigation

The Navigation is always present when you navigate away from the Dashboard panels...





Equipment Inventory



Equipment

View all your equipment via the **Dashboard** or from the **Navigation**

Home	Enquiries	Reports	Requests	Log Off
	<ul style="list-style-type: none"> Equipment Invoices and Credits Jobs Maintenance Contracts 			

FILTER

Find Equipment quickly and easily by filling in the blank fields and pressing **Go**.
To start a fresh search simply press **Reset**.

Search	Equipment No <input type="text"/>	Serial No <input type="text"/>	Site <input type="text" value="<All>"/>	<input type="button" value="Go"/>	<input type="button" value="Reset"/>	
Your Ref	Make	Model	Serial No	Site	Our No	Type
	Daikin	FTC60ACV26	1255335gh4	ABC Widgets Ltd.	966652	Customers Own
	Daikin	RGG1202564	55223334	ABC Widgets Ltd.	966656	Customers Own
Condenser	Carrier	AFS5511111	29999881	ABC Widgets Ltd.	953311	Customers Own
Condenser	Ideal	Cuba 446R90	JP25885ac	ABC Widgets Ltd.	977652	Customers Own
	Contract	FR-evo	100000-VBG	ABC Widgets Ltd.	922145	Customers Own

ENHANCED OVERVIEW

To view an overview of a specific piece of Equipment simply click on any line to bring up detailed information.

In the enhanced overview you can:

- [View Jobs for the Equipment](#)
- [View Equipment Charge History](#)
- [View Inspections for the Equipment](#)
- [Request a Job for the Equipment](#)

View Jobs for this Equipment	View Equipment Charge History	View Inspections for this Equipment	Request a Job
Identification		Location	
Your Ref:		ABC Widgets Ltd.	
Make:	Daikin	121 Widget Avenue	
Model:	FTX60A2VMB	London	
Serial No:		S1 9GB	
Our No:	977726		
Type:	Customers Own		
Meter Reading:			
Meter Reading Date:			
Service Details		Warranty Details	
Next Due:	01/12/2016	Expiry Date:	
Last Done:	31/10/2016		
Meter at last service:			



Invoices and Credits



Invoices

View all your Invoices and Credits via the **Dashboard** or from the **Navigation**

Home	Enquiries	Reports	Requests	Log Off
	Equipment			
	Invoices and Credits			
	Jobs			
	Maintenance Contracts			

OVERVIEW

See Invoices and Credits quickly and easily by clicking on any of the lines for Invoices or Credits.

Type	No	Your Ref	Our Ref	Tax Point	Due Date	Value
Invoice	23568115	Peter Davids	Maint Contract 25946	25/10/2016	24/11/2016	£154.20
Invoice	36599851	Peter Davids	Maint Contract 25702	12/08/2016	11/09/2016	£219.34
Invoice	32156456	Peter Davids	Maint Contract 25702	12/08/2016	11/09/2016	£219.34
1						

ENHANCED OVERVIEW

Each invoice or Credit is displayed along with the equipment, which fulfils the specific contract.

Contract		Dates	
Contract No:	23568115	Start:	01/11/2016
Type:	Maintenance Contract Labour Only	End:	31/10/2017
Order No:	David Joseph	Renewal:	31/10/2017

Equipment

Your No	Make	Model	Serial No	Site	Start Date	End Date	Our No
	Daikin	FTC60ACV26	1255335gh4	ABC Widgets Ltd.	01/11/2016	31/10/2017	977726
	Daikin	RGG1202564	55223334	ABC Widgets Ltd.	01/11/2016	31/10/2017	977727
Condenser	Carrier	AFFS5511111	29999881	ABC Widgets Ltd.	01/11/2016	31/10/2017	977729
Condenser	Ideal	Cuba 446R90	JP25885ac	ABC Widgets Ltd.	01/11/2016	31/10/2017	977730
	Contract	FR-evo	100000-VBG	ABC Widgets Ltd.	01/11/2016	31/10/2017	977731
	Daikin	FTC60ACV26	1255335gh4	ABC Widgets Ltd.	01/11/2016	31/10/2017	977732
	Daikin	RGG1202564	55223334	ABC Widgets Ltd.	01/11/2016	31/10/2017	977733
Condenser	Carrier	AFFS5511111	29999881	ABC Widgets Ltd.	01/11/2016	31/10/2017	978447
Condenser	Ideal	Cuba 446R90	JP25885ac	ABC Widgets Ltd.	01/12/2016	31/10/2017	982288
Contract	FR-evo	100000-VBG	100000-VBG	ABC Widgets Ltd.	01/11/2016	31/10/2017	977731



Job History



Jobs

Access your Jobs via the **Dashboard** or from the **Navigation**

Home	Enquiries	Reports	Requests	Log Off
	Equipment			
	Invoices and Credits			
	Jobs			
	Maintenance Contracts			

FILTER

Find Jobs quickly and easily by filling in the blank fields and pressing **Filter**.

To start a fresh search simply press **Reset**.

Logged between and Equip No
 Site Type

Job No	Type	Order No	Site	Equipment No	Status	Logged	Completed
5110	PPM		ABC Widgets Ltd.	(8 items) 1	Completed	28/10/2016 16:25	31/10/2016 15:07

ENHANCED OVERVIEW

To view a detailed overview of a Job simply click on the Job to bring up its summary and any report

In the enhanced overview you can:

[View Job Sheets](#)

[View Inspections](#)

Job		Site			
Job No:	5110	ABC Widgets Ltd.			
Type:	PPM	121 Widget Avenue			
Status:	Completed	London			
		S1 9GB			
Order No:					
Authority:					
Dates		Invoice		Work Required	
Logged:	28/10/2016 16:25	No:		Service Please look at 2 Simair units whilst on site.	
Due:	01/12/2016 07:00	Date:			
Completed:	31/10/2016 15:07	Cost (NET):			

[View Site](#)



Maintenance Contracts



Contracts

View all your Maintenance Contracts via the **Dashboard** or from the **Navigation**

Home	Enquiries	Reports	Requests	Log Off
	Equipment			
	Invoices and Credits			
	Jobs			
	Maintenance Contracts			

OVERVIEW

See Maintenance Contracts quickly and easily by clicking on any of the lines for each Contract.

Contract No	Your Ref	Start Date	End Date	Renewal Date	Charge	Billing Cycle
23568115	David Joseph	01/11/2016	31/10/2017	31/10/2017	£128.50	Quarterly
36599851	David Joseph	01/11/2015	31/10/2016	31/10/2016	£0.00	Quarterly
1						

ENHANCED OVERVIEW

Each contract is displayed along with the equipment which fulfils the specific contract.

Contract		Dates	
Contract No:	23568115	Start:	01/11/2016
Type:	Maintenance Contract Labour Only	End:	31/10/2017
Order No:	David Joseph	Renewal:	31/10/2017

Equipment

Your No	Make	Model	Serial No	Site	Start Date	End Date	Our No
	Daikin	FTC60ACV26	1255335gh4	ABC Widgets Ltd.	01/11/2016	31/10/2017	977726
	Daikin	RGG1202564	55223334	ABC Widgets Ltd.	01/11/2016	31/10/2017	977727
Condenser	Carrier	AFFS5511111	29999881	ABC Widgets Ltd.	01/11/2016	31/10/2017	977729
Condenser	Ideal	Cuba 446R90	JP25885ac	ABC Widgets Ltd.	01/11/2016	31/10/2017	977730
	Contract	FR-evo	100000-VBG	ABC Widgets Ltd.	01/11/2016	31/10/2017	977731
	Daikin	FTC60ACV26	1255335gh4	ABC Widgets Ltd.	01/11/2016	31/10/2017	977732
	Daikin	RGG1202564	55223334	ABC Widgets Ltd.	01/11/2016	31/10/2017	977733
Condenser	Carrier	AFFS5511111	29999881	ABC Widgets Ltd.	01/11/2016	31/10/2017	978447
Condenser	Ideal	Cuba 446R90	JP25885ac	ABC Widgets Ltd.	01/12/2016	31/10/2017	982288
Contract	FR-evo	100000-VBG	100000-VBG	ABC Widgets Ltd.	01/11/2016	31/10/2017	977731



Reports Suite

Reports

Home

Enquiries

Reports

Requests

Log Off

You can access Reports easily via the **Dashboard** or from the **Navigation**

OVERVIEW

You can request Reports for the following...

1. Equipment List

(All the Equipment you own or have on hire)

2. Jobs List

(All of your Jobs)

3. Maintenance Contracts List

(All of your Maintenance Contracts)

Simply select which option you wish to view from the drop-down menu. Then complete the criteria boxes (dates from and to / site / etc.)

VIEW REPORT

The Resource Centre will generate a report, detailing everything you wish to review. Pressing **Reset Criteria** will display everything how it appeared originally.

Please select a report

Report	Equipment List
Description	Jobs List Maintenance Contracts List

Please select the criteria to apply and then click View Report

Site: <All>

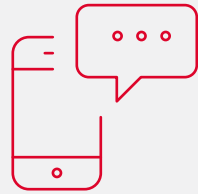
Reset Criteria

View Report

Equipment List

Filters: None

Your No	Make	Model
Condenser	Daikin	FTX60A2VMB
	Daikin	RKS60F2V1B
	Daikin	ATX20J2V1F
	Daikin	ATX20V
	Carrier	



Job Requests



Requests

You can access Job Requests easily via the **Dashboard** or from the **Navigation**



OVERVIEW

Creating a Job Request could not be more simple with the Salix Resource Centre.

1. Select your Contact.

The software will auto-complete the rest of their details

2. Select your Site.

The default is your company.
You can enter a custom site if you wish.

3. Enter the work required for the Job Request.

4. Chose the date for the work to begin.

5. Enter an Order Number if you already have one.

6. Attach any important files for the Job Request.

7. Add the Equipment which needs working on.

8. Submit the Job Request.

Please enter the details for the work you require and then click Submit

Contact*	<input type="text" value="David Joseph"/>
Contact Phone No*	<input type="text" value="020 365 112 336"/>
Contact Email*	<input type="text" value="david@ABCwidgets.com"/>
Site*	<input type="text" value="ABC Widgets Ltd."/>
Work Required*	<input type="text"/>
Date Required*	<input type="text"/>
Order No	<input type="text"/>
Attachment	<input type="text"/> <input type="button" value="Browse..."/>
Equipment	
<input type="button" value="Add Equipment"/>	
<input type="button" value="Submit Job Request"/>	



SALIX RESOURCE CENTRE

0845 177 1750

www.salixmechanical.com/resource-centre