



CATALYST
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User Documentation Enhanced Check Sheets Platinum Online

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About Enhanced Check Sheets

Platinum Online has a brand-new feature called Enhanced Check Sheets which can be used by your business to create fully customisable check sheets that can be completed on any device. Check sheets can be created against a Unit or Workshop Job which once submitted can be accessed and managed within the check sheet areas in Desktop Platinum, saving users time and unnecessary paperwork.

Unlike the previous check sheets functionality, users can create a custom check sheet through selecting multiple components of their choice including images, RAG ratings, multiple choice answers, check boxes, free text boxes, guidance notes and logging advisory information.

You can now also record customer and technician signatures in real time through your device's screen. Enhanced check sheets can be used to create a variety of different documents for your business including service reports, acceptance reports, safety checks, vehicle inspection reports and any other documents you require to complete for a unit or workshop job.

The key benefits of enhanced check sheets include:

- **Fully Digital:** Enhanced Check Sheets can be created and completed on any device reducing unnecessary paperwork and printing costs.
- **Fully Customisable:** You can create any section, item, or question type in the order you require on your check sheet. You no longer need to be restricted by fixed templates.
- **Save time and money:** More complex check sheets can be created using our enhanced check sheet functionality, allowing customers and technicians to sign digital copies of each check sheet.
- **Minimise admin time and costs:** Check Sheet templates can be created once in your system and rolled out to multiple units and workshop jobs with our easy-to-use wizard. The responses recorded in your check sheet on Platinum Online are updated against the unit and/or job in Desktop Platinum instantly.

Current Status

- **Phase 1 – Live**
 - Enhanced Check Sheet functionality in the Workshop

- **Phase 2 – In Development**
 - Enhanced Check Sheet functionality in Sales & Admin areas
 - Platinum Online Sales License
 - Image Annotation
 - Save Progress
 - Email and Print

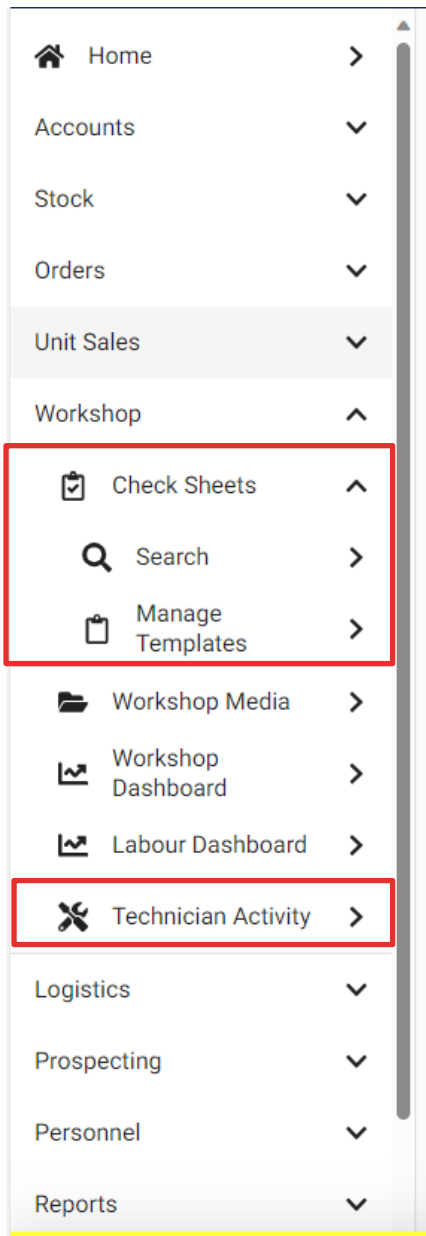
Phase 2 functionality to be released in regular intervals.



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Menu

Menu Navigation



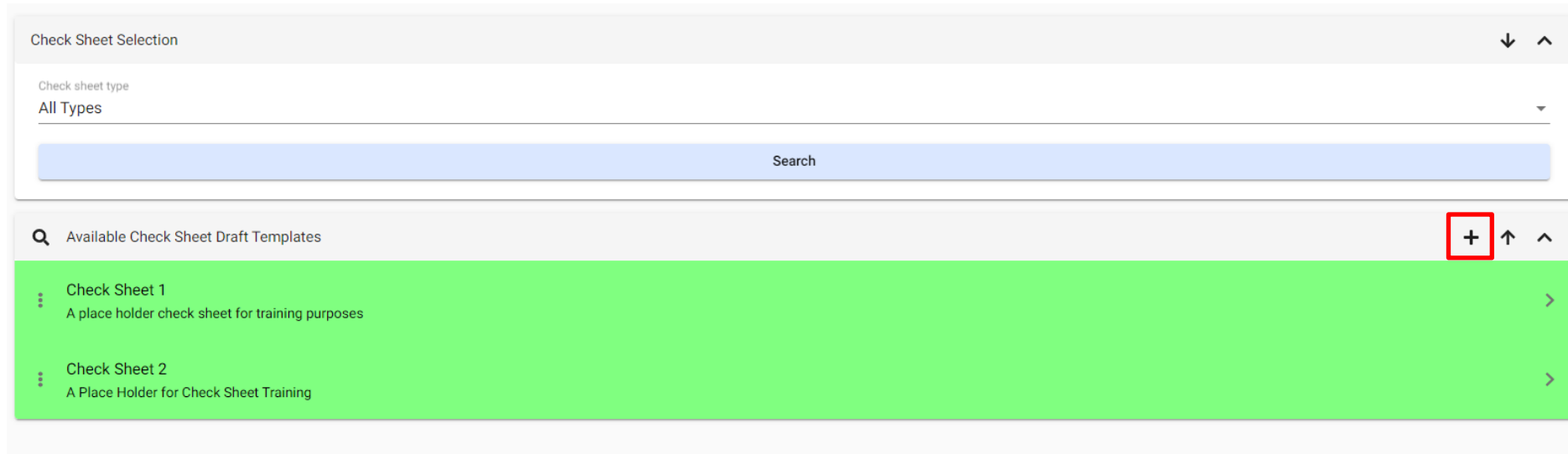
- Enhanced Check sheets can be found in Platinum Online under the **Workshop** drop down within the main navigation bar.
- The **Manage Templates** area is used to create and publish check sheet templates relating to workshop jobs. This area can also be used to edit draft check sheets before they have been published.
- The **Search** area is used to find published check sheets that you want to complete outside of a workshop job. Check sheets completed in this area are stored against the unit in Desktop Platinum.
- Published Check Sheets can also be completed against a Job in **Technician Activity**. Available enhanced check sheets appear under the check sheets drop down if they meet the criteria of a job listed in Platinum Online.



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Create a Check Sheet Template

Create



- Upon selecting the **Manage Drafts** drop down option under **Check Sheets** from the navigation bar you will be directed to this screen.
- Published Check Sheets will be displayed in **green** whilst unpublished check sheets will be displayed in **grey**.
- You can filter different types of check sheet through searching the options at the top of the page and select search to display results.
- To create a new draft check sheet, select the **+** button to the right of the Available Check Sheet Draft Templates box.

Add Title & Description

Search

Available Check Sheet Draft Templates

Create Check Sheet Template

Title *
Insert the name of your check sheet here

Description *
Insert the description of your check sheet here

Save & Next Cancel

- Enter a **Title** for your check sheet and fill out the **Description** fields before selecting **Save and Next**.
- If you want to close the create check sheet window, select the **Cancel** button. This will close the window and take you back to the **Manage Templates** screen.

Choose Job Type

- Link the **Job Type** for the Check Sheet you are creating.
- Custom job types created using desktop Platinum can be found under the **Job Types** drop down.

Link to Job Types

General

Service

MOT

PDI

Visual Health Check

Job Types ▼

Choose Unit Type

- Select the **Unit Types** for the check sheet you are creating.
- To apply this check sheet to all units, select the **All** box.
- You can apply a check sheet to a **Unit**, **Manufacturer** or **Model** Type.
- Once you have selected a **Job Type** and **Unit Type** select **Next** to move to the next screen.

Link to Unit Types

All

Unit Type

Car Select Unit Type

Manufacturer

Adler

Select Manufacturer

Model

Next >

Page Set up Header

Page Setup



Header

Add Logo

Job Details

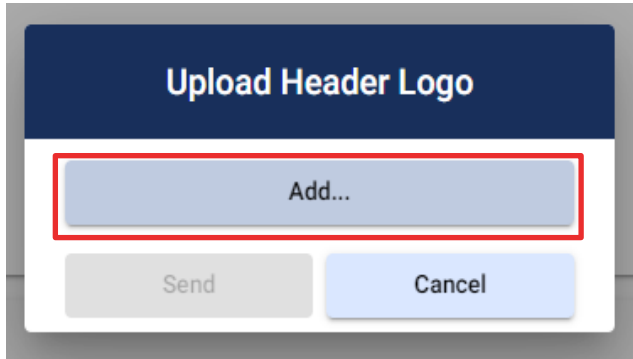
Customer Details

Unit Details

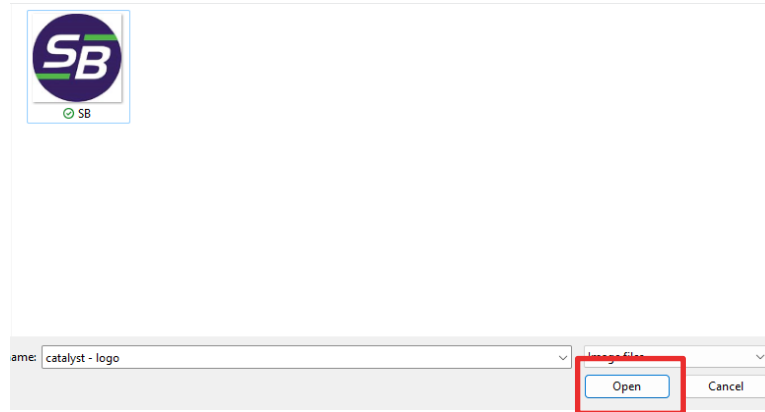
Date Completed

- On the next page select the **Header Options** that you want to view on your check sheet.
- **Job Details** will add a box pre-populated with any job information for this check sheet if completed as part of a workshop job.
- **Customer Details** will add a box pre-populated with the customer information when completing this check sheet.
- **Unit Details** will add a box pre-populated with the information about the unit selected when completing this check sheet.
- **Date Completed** will add a box pre-populated with a time stamp of when this check sheet was completed.
- **Add Logo** will allow you to add an image to the top right-hand corner of your check sheet.

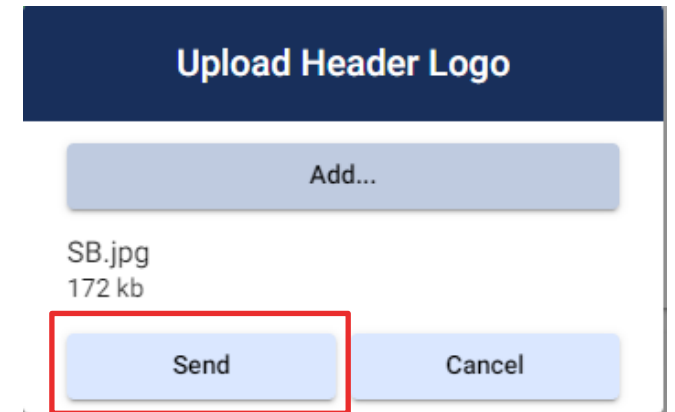
Add Logo



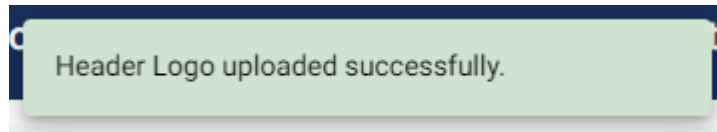
- After selecting the add logo option on the check sheet header, this box will open.
- Click on **Add** to open the file explorer window.



- Locate the image file saved on your computer, highlight and select **open**.



- The file name of the image will be shown in the box. Click on **Send** to upload this to your check sheet.



- You will receive this message at the top of the check sheet page to notify you that your image has been uploaded successfully.

Page Set up Footer



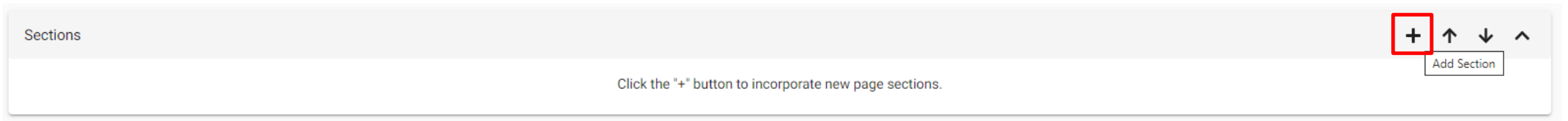
- Next select which options you would like to apply to your check sheet footer. This is the area at the bottom of your check sheet.
- **Guidance Notes** will add a free text box of 500 characters at the bottom of your check sheet that you can use.
- **Customer Signature** will add a button that can be selected to enable customers to add a signature to your check sheet.
- **Technician Signature** will add a button that can be selected to enable technicians to be able to add a signature to your check sheet.



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Sections

Add a Section



- The **Sections** area is located underneath the header and footer options on your check sheet template.
- To create a section, select the + button.

Section Title

The screenshot shows a window titled "Sections" with a toolbar containing a plus sign, up arrow, down arrow, and up arrow. The main content area contains a form with three main components: a text input field at the top with the placeholder text "Insert the Section Title here" and a red border; a light gray button labeled "Add Item/Query" below it; and a dropdown menu labeled "Select Type" to the right of the button. A plus sign is located at the bottom left of the form area.

- Once you have added a section, add the **Section Title** to the box highlighted to name the section.



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Items and Queries

Add Item or Query

Insert the Section Title here

Add your question here?

Select Type

+

- Next, add the first **Item or Query** to your check sheet in the box highlighted.

Item Type

The screenshot shows a software interface with a top navigation bar containing three tabs: 'Guidance Notes', 'Customer Signature', and 'Technician Signature'. Below this is a 'Sections' panel. The panel contains a text input field with the placeholder 'Insert the Section Title here', a larger text area with the placeholder 'Add your question here?', and a plus sign icon at the bottom left. A dropdown menu is open on the right side of the panel, listing five options: 'Image', 'Free Text Box', 'Check Box', 'Number', and 'Date'. The dropdown menu is highlighted with a red border.

- Next, select the type of **Item or Query** you would like to appear on your check sheet.
- There are 7 available options that include Images, Free Text Boxes, Check Boxes, Numbers, Dates, Advisories and Multiple Options.



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Items and Query Types

Item Type - Multiple options

Add/Edit Options

Add your question here?

Option 1 *
Option 1

Option 2 *
Option 2

Option 3

Option 4

Apply Cancel

Insert the first question here?

Option 1

Option 2

Option 3

Option 4

Insert the third question here?:

- Once you select the **Multiple Options** query type, the following box will appear.
- Enter up to 4 options that you would like your check sheet consumer to select from.
- Click **Apply** to add these options to your item/query.

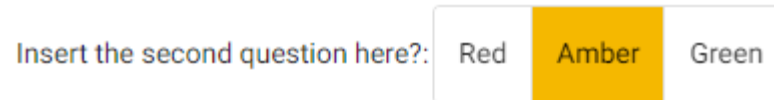
- Multiple options appear like the above once **published**.

Item Type - RAG



The screenshot shows a form editor interface. At the top, there is a text input field labeled "Insert the Section Title here". Below this, there are two question input fields. The first is labeled "Add your question here?" and the second is labeled "Insert your question here?". To the right of the first question field is a dropdown menu labeled "Select Type" with "Multiple Options" selected. To the right of the second question field is another dropdown menu labeled "Select Type" with "RAG" selected. A red rectangular box highlights the "RAG" selection in the second dropdown menu. A plus sign (+) is located at the bottom left of the form editor.

- A **RAG** item / query type will allow your check sheet consumer to be able to select a rating of **Red**, **Amber** or **Green** for that question type.



The screenshot shows a published check sheet. It features a text input field labeled "Insert the second question here?:". To the right of this field is a rating selection interface with three buttons: "Red", "Amber", and "Green". The "Amber" button is highlighted in yellow, indicating it is the selected rating.

- This is how it will display on your **published** check sheet.

Item Type - Image

Insert the Section Title here

| | |
|-----------------------------------|---------------------------------|
| Add your question here? | Select Type Multiple Options |
| Insert your second question here? | Select Type RAG |
| Insert your third question here? | Select Type Image |

- An **Image** item or query type will allow the check sheet consumer to upload an image to a check sheet they are completing.

Insert the third question here?:

Upload



- This is how an image looks on your check sheet once it has been uploaded to a **published** check sheet.

Item Type - Free Text Box

Insert your fourth question here?

Select Type

Free Text Box

- A **Free Text Box** item or query type will allow your check sheet consumer to be able to enter up to **500 characters** in a text box.

Insert the fourth question here?

- This is how it will display on your **published** check sheet.
- You can expand the box by dragging the **3 lines** in the **bottom right-hand corner**.



Item Type - Check Box

Insert your fifth question here?

Select Type

Check Box

- A **Check Box** item or query type will allow your check sheet consumer to be able to check or uncheck an item or query.

Insert the fifth question here?

Insert the fifth question here?

- A check box appears as above on a **published** check sheet.

Item Type - Number

Insert your sixth question here?

Select Type

Number

- A **Number** item or query type will allow your check sheet consumer to be able to add a number into a published check sheet.

Insert the sixth question here?



34



- Above is how a number is displayed on a **published** check sheet.
- Once published a number can be added to the item or query using their keyboard or they can use the + and - buttons to move up and down by one whole number.

Item Type - Date

Insert your seventh question here

Select Type

Date

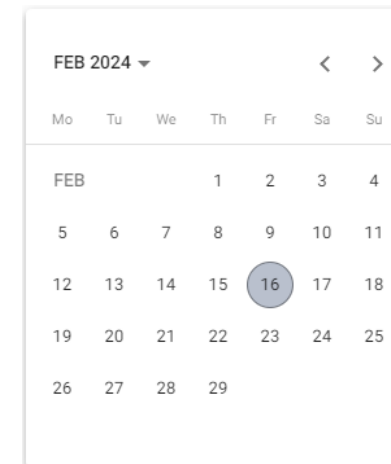
- A **Date** item or query type allows the check sheet consumer to select a date when completing a **published** check sheet.

Insert the seventh question here?

15/02/2024



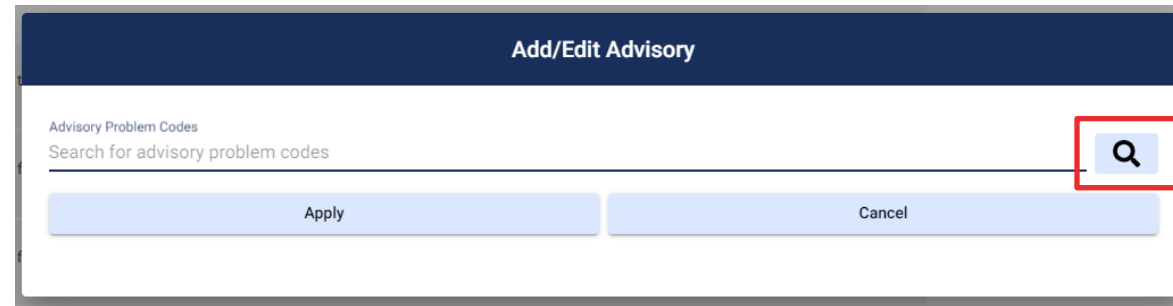
- A check sheet consumer can add a date using the **DD/MM/YYYY** format using their keyboard, or they can use a calendar to select a date by clicking on the **calendar icon**.



Insert the seventh question here?

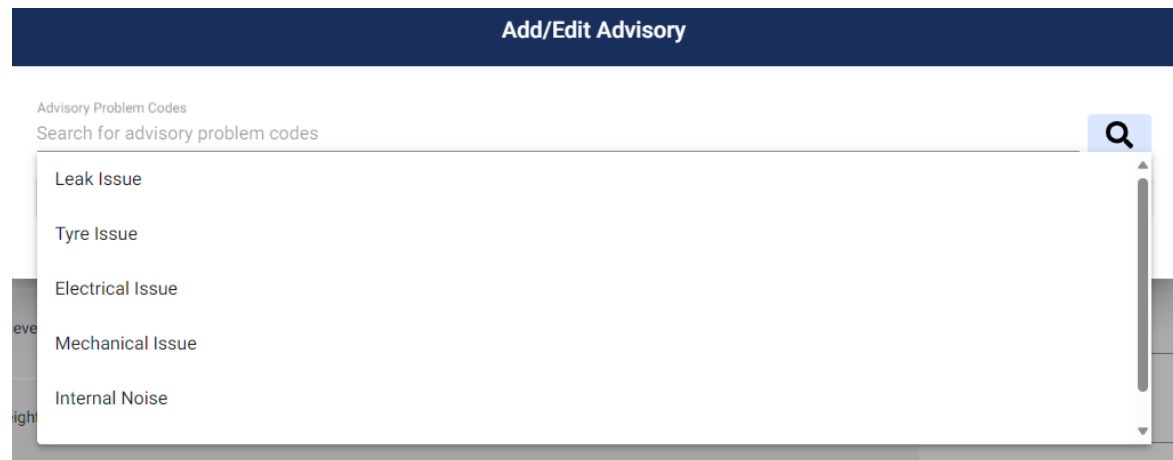
Item Type - Advisory

- An **Advisory** item or query type allows the check sheet consumer to record a **pass, advisory, urgent or immediate** result against an item or query. The result of this field when completing a published check sheet is stored against the unit in Desktop Platinum.



The screenshot shows the 'Add/Edit Advisory' form. At the top, there is a dark blue header with the text 'Add/Edit Advisory'. Below the header, the text 'Advisory Problem Codes' is displayed. Underneath, there is a search input field with the placeholder text 'Search for advisory problem codes'. To the right of the input field is a search button with a magnifying glass icon, which is highlighted with a red square. Below the input field, there are two buttons: 'Apply' and 'Cancel'.

- After selecting the Advisory item or query, you can use the **search** button to open a list of all advisories that you have created in Desktop Platinum to link that question to a problem code. You can then select the correct problem code to match the advisory you have created.



The screenshot shows the 'Add/Edit Advisory' form with the search button clicked. A dropdown list is open, displaying a list of advisory problem codes. The list includes: 'Leak Issue', 'Tyre Issue', 'Electrical Issue', 'Mechanical Issue', and 'Internal Noise'. The search button is highlighted with a blue square.

Item Type - Advisory

Add/Edit Advisory

Advisory Problem Codes
Tyre Issue

- Once selected, select **Apply** to attach the problem code to the query or item in your check sheet template.

Select Type
Advisory

- To **View** or **Edit** the advisory code you have applied to an item or query type select the **Clipboard** icon.

Insert the eighth question here?:

| | | | |
|------|----------|--------|-----------|
| Pass | Advisory | Urgent | Immediate |
|------|----------|--------|-----------|

- An advisory question type appears as shown on the **left** in a **published** check sheet.

Item Type - Edit

| | | |
|------------------------------------|---------------------------------|---|
| Insert your first question here? | Select Type Multiple Options | — |
| Insert your second question here? | Select Type RAG | — |
| Insert your third question here? | RAG | — |
| Insert your fourth question here? | Image | — |
| Insert your fifth question here? | Free Text Box | — |
| Insert your sixth question here? | Check Box | — |
| Insert your seventh question here? | Number | — |
| Insert your eighth question here? | Select Type Date | — |
| Insert your ninth question here? | Select Type Advisory | — |

- You can make any changes to a check sheet before publishing. Select the type to change how the item or query is displayed on your check sheet or select the text in the item or query to change this information.
- To remove an item or query select the — button to the left of the item or query you want to remove.



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Save Progress, Editing and Publishing

Save to Draft

Insert your seventh question here?

Insert your eighth question here?

Date

Select Type
Advisory

+

Save to Draft

Preview

Publish

- To save changes to your check sheet template, select the **Save to Draft** button at the bottom of the screen. We recommend that you do this regularly to ensure you do not lose any changes you make.

Check sheet template draft has been updated successfully.

- A message is displayed at the top of the screen to let you know that changes have been saved successfully.

Preview

Insert your seventh question here?

Insert your eighth question here?

Date

Select Type
Advisory

+

Save to Draft

Preview

Publish

- To review your Check Sheet template, select the **Preview** button to open a screen showing what the check sheet will look like once published.

Preview

Insert the name of your check sheet here
Insert the description of your check sheet here

SB

| Job Info | Unit Info | Customer Details | Date Completed |
|----------|--------------|------------------|----------------|
| General | Car Adler | | 16/02/2024 |

Insert section title here

Insert your first question here? Comments

Insert your second question here? Red Amber Green Comments

Insert your third question here? Upload Comments

Insert your fourth question here? Comments

Insert your fifth question here? Comments

Insert your sixth question here? 0 + Comments

Insert your seventh question here? Comments

Insert your eighth question here? Pass Advisory Urgent Immediate Comments

Submit

Guidance Notes

Technician Signature Customer Signature

- Use the scroll bar to move up and down when previewing your check sheet.
- You can close the preview page by selecting the **X** icon in the top right-hand corner.

Publish



Insert your seventh question here?

Insert your eighth question here?

+

Date

Select Type
Advisory

Save to Draft

Preview

Publish

- Once you are happy with your draft template, you can select the **Publish** button to make this check sheet available to check sheet consumers.
- **Currently you are unable to edit a published check sheet, so it is important that you only do this when you are happy with the content you have added. This functionality will be coming shortly.**

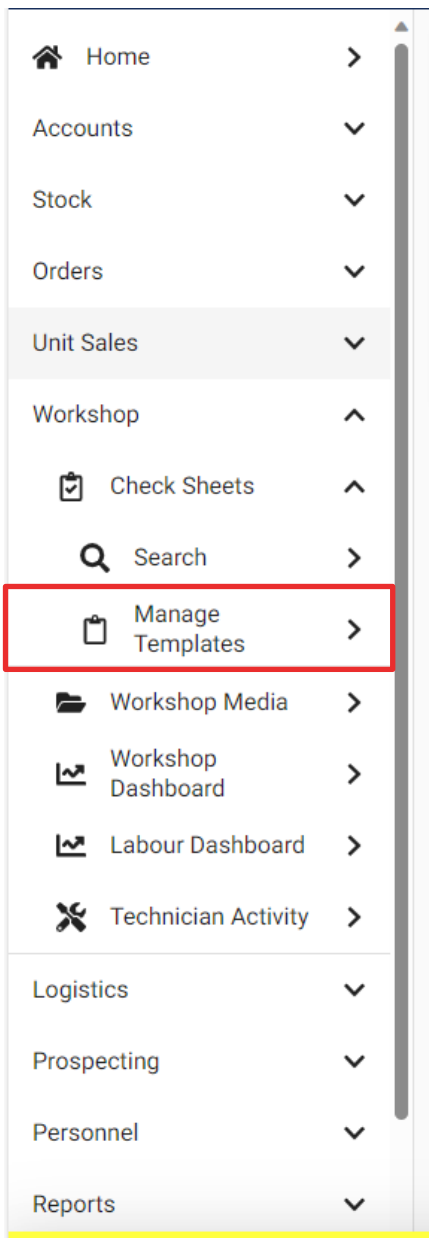


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Editing a Draft Template

Edit Draft Template

- To edit a **Draft Check Sheet Template**, navigate to the **Manage Templates** area.
- Select the draft template you wish to edit by clicking on the **grey** box.



Edit Draft Template

Your previous actions:
Header Logo uploaded successfully.

Insert the name of your check sheet here (2)

Insert the description of your check sheet here

Link to Job Types

General

Service

MOT

PDI

Visual Health Check

Job Types ▼

Link to Unit Types

All

Unit Type

Manufacturer

Model

Next >

- On the first screen you can edit the **Name** and **Description** of your draft check sheet by selecting the fields at the top.
- You can also edit the **Job Types** and **Unit types** for this check sheet before selecting **Next**.

Edit Draft Template

Insert the name of your check sheet here (2)
Insert the description of your check sheet here

Page Setup

Header

Add Logo Job Details Customer Details **Unit Details** Date Completed

Footer

Guidance Notes **Customer Signature** Technician Signature

Sections

Insert Section Title

Add Item/Query Select Type

+

- Once you have clicked next, you will be able to edit the **Header, Footer, Section** and **Item or Queries** in your draft check sheet.

Save to Draft Preview Publish

- You can continue to **Save Progress, Preview** and **Publish** your check sheet once you are happy with the changes you have made.



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Completing a Check Sheet Search

Search for Published Template

- To complete a check sheet against a unit, navigate to the search area in Platinum Online.
- Select the **Check Sheet Type** you are looking to complete and Select the **Unit** you wish to complete the check sheet against using the **Search** button.

Check Sheet Selection

Check sheet type
Service

Unit
type or search for unit

YI 088 - boat desc.

5151 - year 2023 bicycle

unit01 - desc. of quad or ATV

unit02 - description of caravan

123 - plat MotorHome


Test Check sheet for training

- Select the check sheet you want to complete by clicking on the grey box. This will open the **Published Check Sheet**.

Complete Published Check Sheet

YI 088 - Insert the description of your check sheet here
boat desc:

Insert the name of your check sheet here
Insert the description of your check sheet here



| Date Completed | Customer Details | Unit Info | Job Info |
|----------------|------------------|-----------|----------|
| 16/02/2024 | | | General |

Insert section title here

Insert the first question here? Comments

Insert the second question here? Red Amber Green Comments

Insert the third question here? Upload Comments

Insert the fourth question here? Comments

Insert the fifth question here? Comments

Insert the sixth question here? - 0 + Comments

Insert the seventh question here? Comments

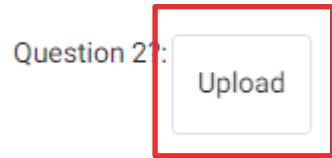
Insert the eighth question here? Pass Advisory Urgent Immediate Comments

Guidance Notes

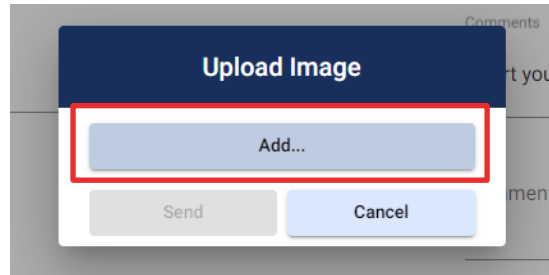
Customer Signature Technician Signature

- The **Selected Check Sheet** will open, and the consumer will be able to fill out the check sheet fields for that unit as designed within the template.
- The consumer can enter text, select multiple options, RAG ratings, upload an image as well as fill out guidance notes and signatures depending on the item types that have been added.
- This screen has been optimised to work on screens of all sizes including **mobile, tablet, desktop and laptops**.
- The next pages will show additional fields and functionality that have been added through your **header or footer options** as well as detail the **image upload process**.

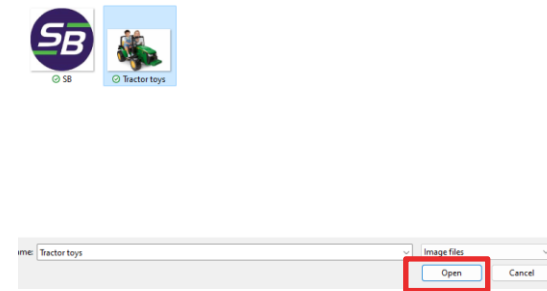
Complete Check Sheet - Image



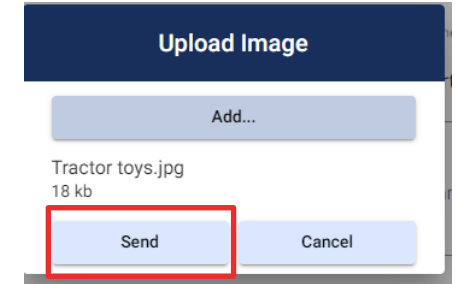
- To add an image to a check sheet, select the **Upload** button.



- Select **Add** from the box that appears on your screen.



- Select your image from your device and select **Open**. Images must be less than 10mb and in JPEG or PNG format.



- Select **Send** to upload the image to the check sheet you are completing.

Insert the third question here?:



- The thumbnail of the image will be displayed on the check sheet once uploaded successfully. This image will be sent to **Desktop Platinum** and stored against the unit and workshop job once submitted.

Complete Check Sheet - Comments

Comments



Comments

Comments

Comments

- Each item or query you add to a check sheet template will include an optional **Comments Box** for you to add any further information to when completing a check sheet.
- This field works similarly to the free text boxes in the system and can be typed into with comments which are saved in Platinum Desktop in the check sheet results areas.

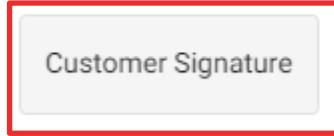
Complete Check Sheet - Guidance Notes

Guidance Notes

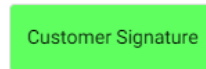



- If you have selected guidance notes in the footer options, then a free text box called **Guidance Notes** will appear at the bottom of the page.
- This field has a **character count of 500** and behaves the same as a free text box.
- You can expand the guidance notes box by dragging the **right bottom hand corner** with your mouse or finger.

Complete Check Sheet - Customer Signature



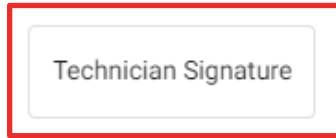
- If you have selected to have a customer signature on the footer of a check sheet, then a grey box will appear at the bottom of your page which the check sheet consumer can click to add a **Customer Signature**.



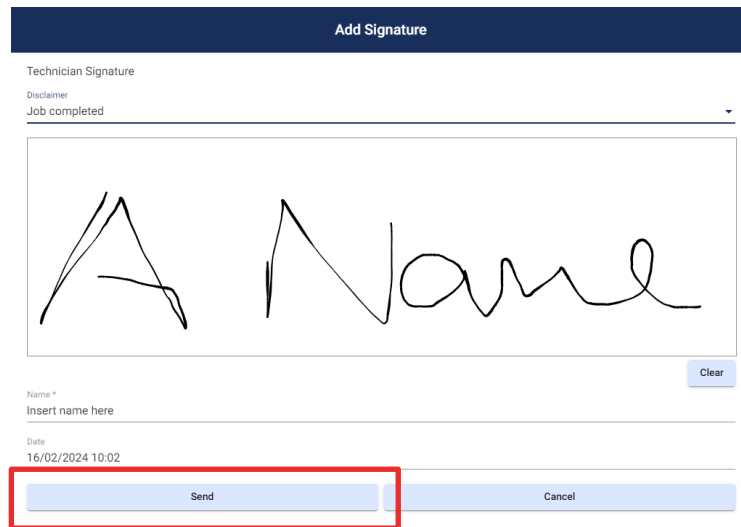
Nam

- In the box that appears, a signature can be added with a finger, stylus or mouse before adding a name and reason for signature.
- The signature is automatically date stamped and can be previewed in the check sheet once **Send** has been selected.

Complete Check Sheet - Technician Signature

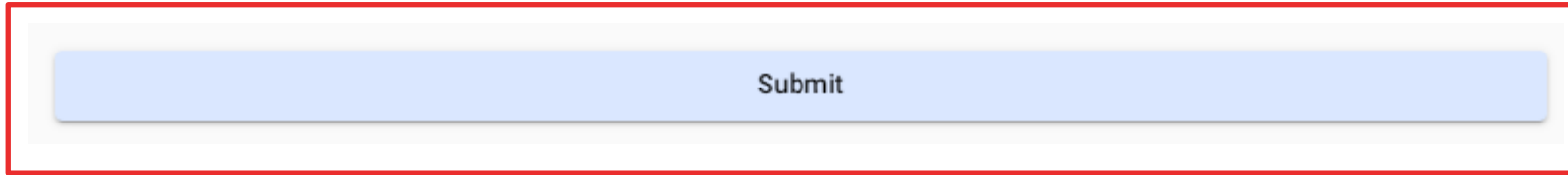


- If you have selected to have a technician signature on the footer of a check sheet, then a grey box will appear at the bottom of your page which the check sheet consumer can click to add a **Technician Signature**.



- In the box that appears, a signature can be added with a finger, stylus or mouse before adding a name and reason for signature.
- The signature is automatically date stamped and can be previewed in the check sheet once **Send** has been selected.

Complete Check Sheet - Submit



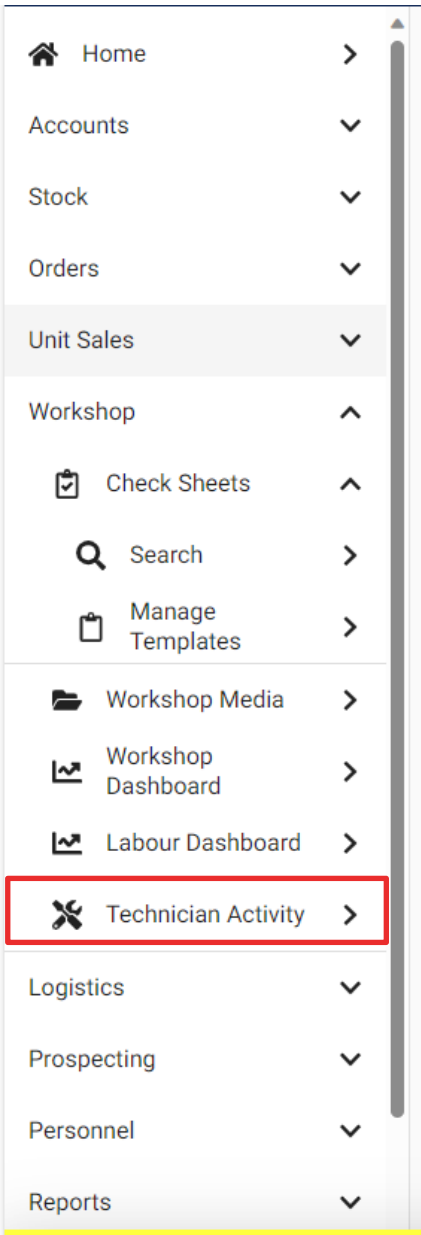
- Once you have completed the check sheet you can select **Submit** at the bottom of the page to store the completed information in Desktop Platinum.



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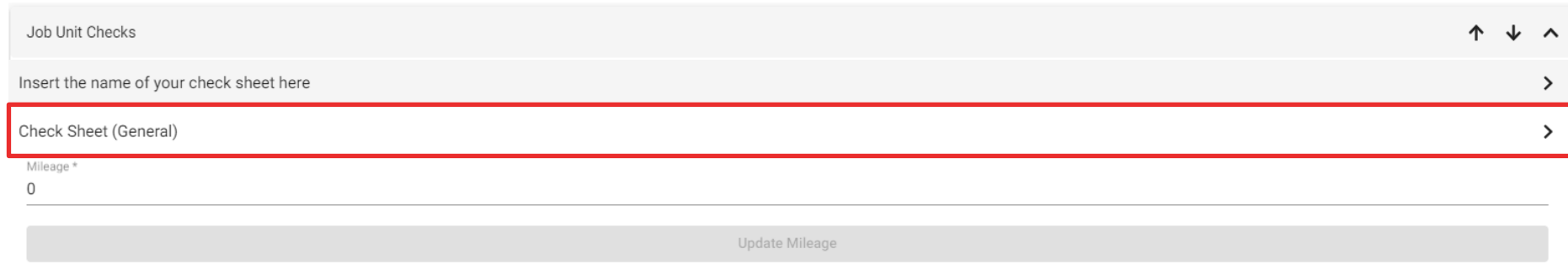
Completing a Check Sheet Technician Activity

Technician Activity



- To complete a check sheet as part of a Workshop job, navigate to the **Technician Activity** area in Platinum Online.
- Create or Select an available Job which will automatically link available published check sheets that you can apply to that unit.
- Select the **Job** you want to complete.

Technician Activity



The screenshot shows a software interface for 'Job Unit Checks'. At the top, there is a header 'Job Unit Checks' with navigation arrows (up, down, refresh). Below the header is a text input field with the placeholder 'Insert the name of your check sheet here'. A list of check sheets follows, with 'Check Sheet (General)' highlighted by a red rectangular box. Below the list is a 'Mileage *' field with the value '0' and an 'Update Mileage' button.

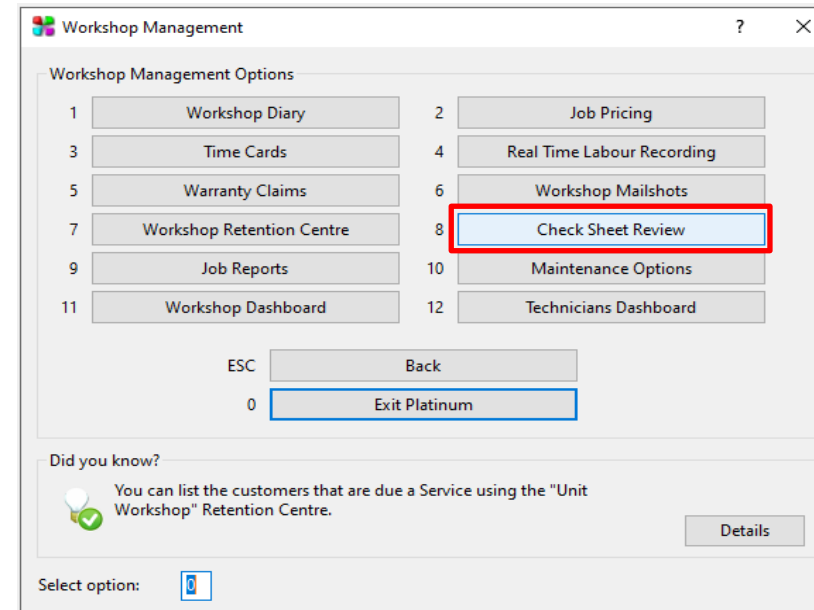
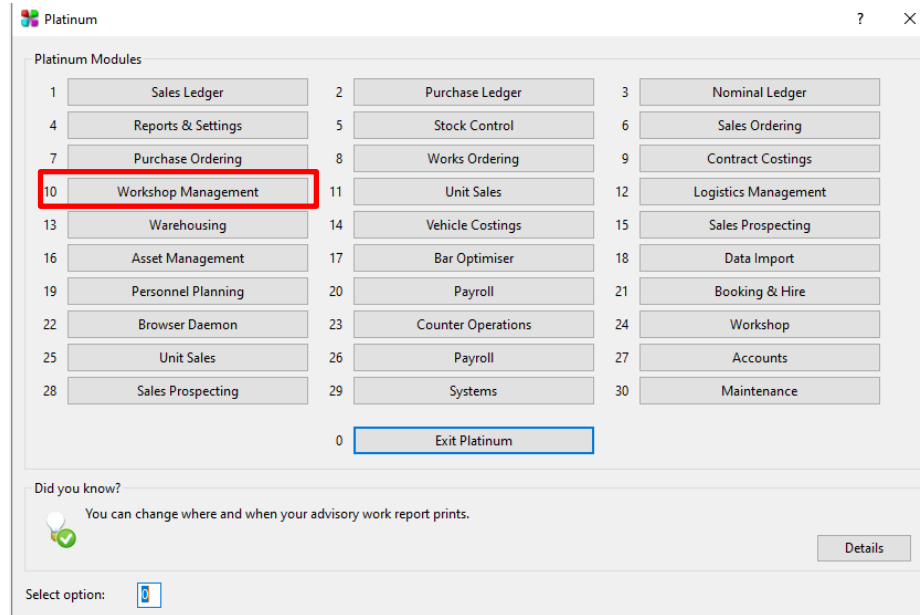
- In the job screen, scroll down to the **Job Unit Checks** area where a list available check sheets are listed.
- Select the check sheet by clicking on the **grey** box to open. You can then fill out the available fields in the same way as early described in this document.



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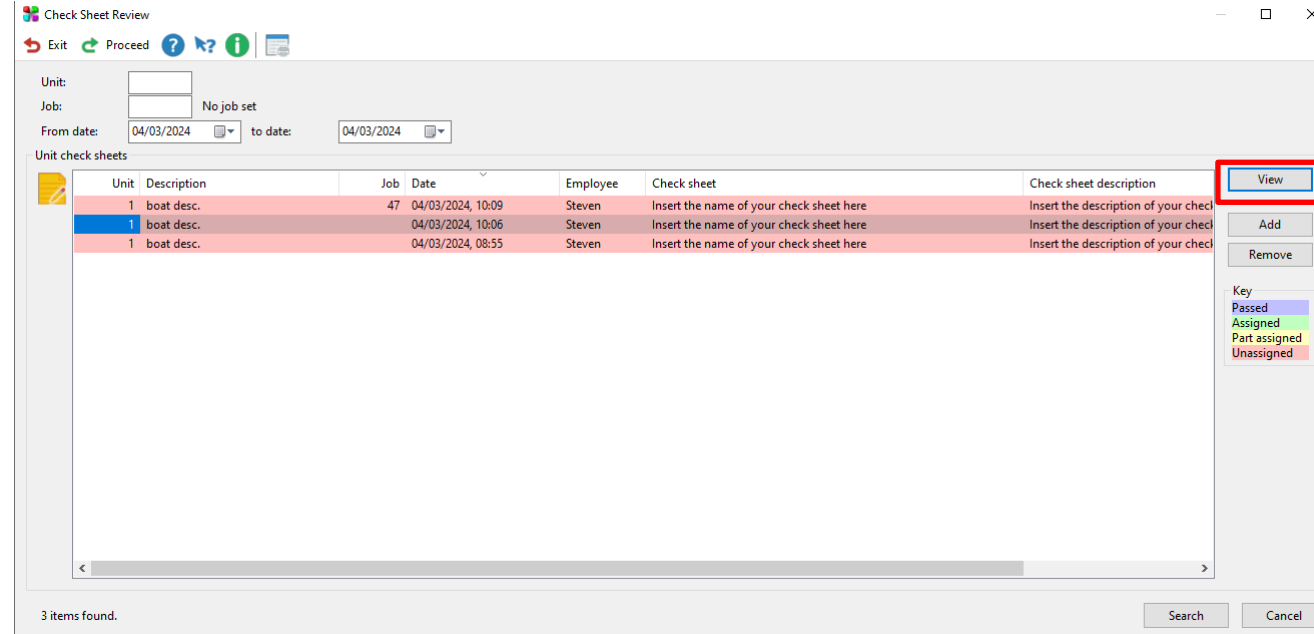
Viewing in Desktop Platinum Check Sheet Review

Check Sheet Review



- Once a check sheet has been submitted using Platinum Online, the check sheet can be viewed in the **Check Sheet Review** area of Desktop Platinum.

Check Sheet Review



- Completed check sheets are listed in the **Review** area where you can select a check sheet to **View** the results that were logged in Platinum Online.

Check Sheet Review

Unit: 1 boat desc. Check sheet: Insert the name of your check sheet here
Insert the description of your check sheet here

Details **Media**

Check sheet details

Date: 04/03/2024 Time: 10:06
Job: No job set
Employee: SB Steven Brown
Guidance notes:

Section: Insert section title here

| Question | Result | Comments |
|-----------------------------------|-------------|--------------------|
| Insert the first question here? | Option 2 | |
| Insert the second question here? | Amber | Comment added here |
| Insert the third question here? | Image 1 | |
| Insert the fourth question here? | Test Answer | |
| Insert the fifth question here? | Checked | Comment added here |
| Insert the sixth question here? | 34.000 | |
| Insert the seventh question here? | 05/11/1987 | |
| Insert the eighth question here? | Immediate | |

Question: Insert the first question here?
Result: Option 2
Comments:

Edit Done

- In the Check Sheet Details screen you can view the name and description of the check sheet.
- Each result is displayed in a table, with the question, result and any additional comments.
- Users can use the section filter to only see results relating to a particular section.
- To access Images and Signatures, select the **Media** tab.

Check Sheet Review

Unit: 1 boat desc. Check sheet: Insert the name of your check sheet here
Insert the description of your check sheet here

| I | Type | Cate... | Category description | Publish | Name | Order |
|---|-------|---------------|----------------------|---------|--------------|-------|
| | Image | Uncategorised | Uncategorised | Default | Image 1.jpeg | 1 |
| | Image | Uncategorised | Uncategorised | No | Image 2.png | 2 |
| | Image | Uncategorised | Uncategorised | Yes | Image 1.jpeg | 3 |

Disclaimer: Goods received
Name: Stuart Brown
Date: 04/03/2024 10:05
Check sheet:

List of currently stored media

Open
Add File
Add Video
Replace
Remove
Add Scan
Replace Scan
Set Default
Move Up
Move Down

Edit Done

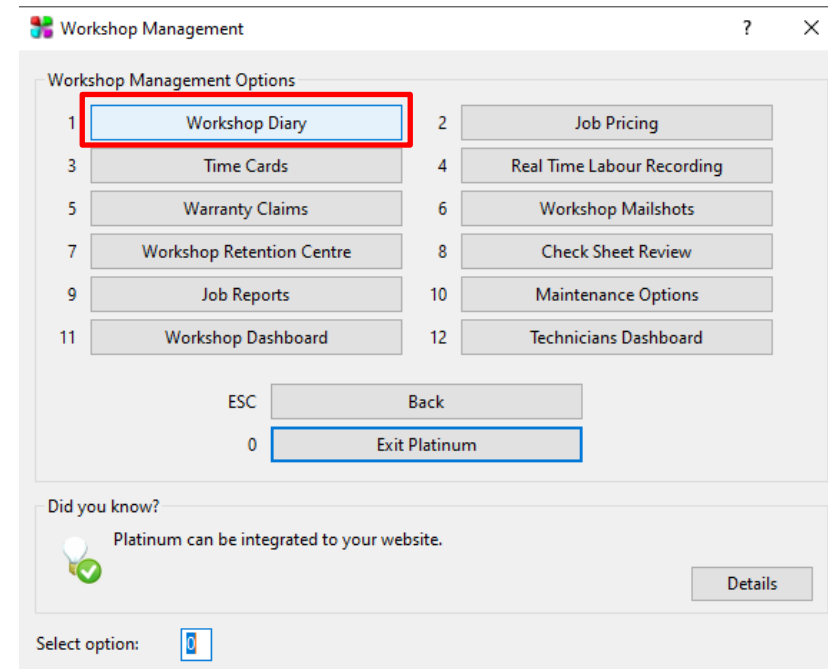
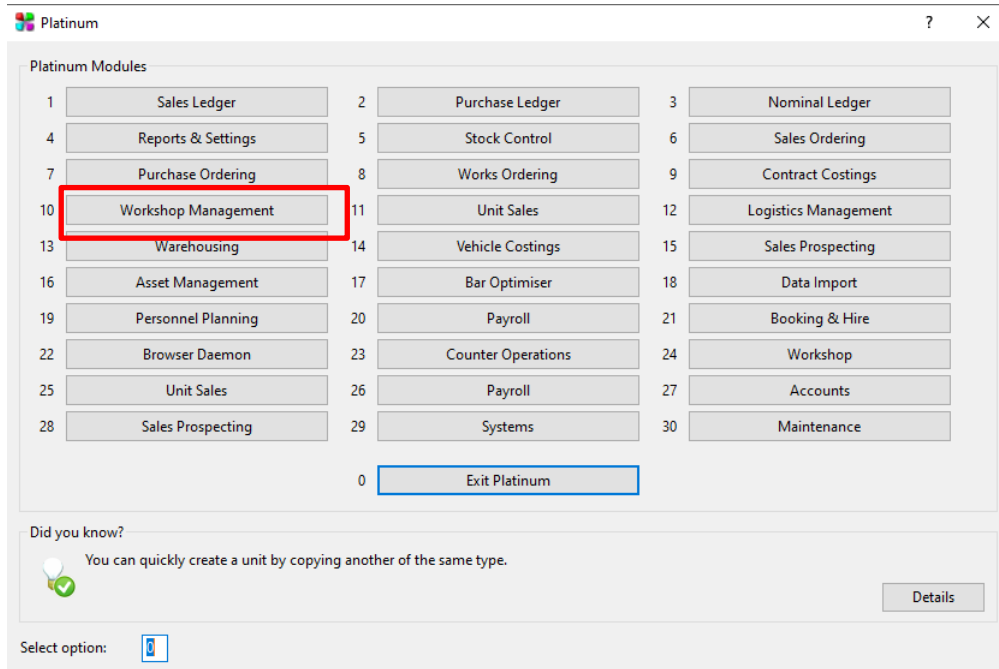
- Attached images are displayed in the **Media tab**.
- This includes images that were attached and signatures that were completed.
- You can open up any image using the **Open** button on the right-hand side of the screen.



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Viewing in Desktop Platinum Job Properties

Job Properties



- Once a check sheet has been submitted using Platinum Online within a Job in **Technician Activity**, the check sheet can be viewed in the **Job Properties** area of Desktop Platinum.

Job Properties

The screenshot displays the 'Workshop Diary' application. At the top, there is a navigation bar with options like 'Exit', 'Proceed', and 'View Sales Jobs'. Below this is a calendar view for March 2024, showing days from Monday to Tuesday. Each day has a small icon and text indicating job status, such as 'C.U.: 0', 'Avl: 31', and 'Wk: 3%'. The main area shows a table of jobs for 'Monday, 4th March 2024 (31 hours available for General Stock Depot)'. The table has columns for Job, Stat, Unit, Skill, Start, Hrs, Type, Deadline, Phone, Name, L, M, C.U., Account, Labour code, Duration, Due date, Advisories, and Manufacturer. A single job is listed with Job ID 47, Stat BI, Unit (Y1285)-boat desc., Skill 0000, Start 00:00, Hrs 1, Type 0000, Phone 07342221502, Name Perry Stewart, L APER001, M SR, C.U. 0000, Account 0000, Labour code 0000-0100, Duration 04/03/24, Advisories Yes, and Manufacturer. To the right of the table is a 'Job Properties' panel for the selected job. It includes fields for Contact (Perry Stewart/07342221502), Job hours (1 (1)), Courtesies (No courtesy unit allocated), Status (Booked in), Type (No job type set), Skill (Workshop), and Labour (Steven Brown). The 'Edit' button in the top right of the Job Properties panel is highlighted with a red box.

| Job | Stat | Unit | Skill | Start | Hrs | Type | Deadline | Phone | Name | L | M | C.U. | Account | Labour code | Duration | Due date | Advisories | Manufacturer |
|-----|------|--------------------|-------|-------|-----|------|-------------|-------|---------------|---------|----|------|---------|-------------|----------|----------|------------|--------------|
| 47 | BI | (Y1285)-boat desc. | 0000 | 00:00 | 1 | 0000 | 07342221502 | | Perry Stewart | APER001 | SR | 0000 | 0000 | 0000-0100 | 04/03/24 | Yes | | |

- Select the Job and click on **Edit** to open up the Job Properties area where the check sheet is stored.

Job Properties

Job Properties

Job: 47 Perry Stewart (VI 088,boat desc.) Job for testing check sheets

Details Description Invoice Items Estimate Items Job Types Third Party Job Totals Notes Media Fitted Units Check Sheets

Unit check sheets

| Date | Employee | Check sheet | Check sheet description |
|-------------------|----------|--|------------------------------------|
| 04/03/2024, 10:09 | Steven | Insert the name of your check sheet here | Insert the description of your che |

You are viewing a list of check sheets on file for the current job

View Add Remove

Key
Passed
Assigned
Part assigned
Unassigned

General notes Edit Done

- In the Job Properties area, select the **Check Sheets tab** to open up a list of check sheets completed for this job.
- Select **View** to see the details recorded against that check sheet.

Job Properties

The screenshot shows the 'Job Properties' software interface. At the top, there is a navigation bar with buttons for 'Exit', 'Proceed', 'Save', 'Email', and 'Replace'. Below this, the 'Details' tab is active, and the 'Media' sub-tab is selected. The 'Associated media' section contains a table with the following data:

| I | Type | Cate... | Category description | Publish | Name | Order |
|---|-------|---------------|----------------------|---------|--------------|-------|
| 1 | Image | Uncategorised | Uncategorised | Default | Image 1.jpeg | 1 |
| 2 | Image | Uncategorised | Uncategorised | No | Image 2.png | 2 |
| 3 | Image | Uncategorised | Uncategorised | Yes | Image 1.jpeg | 3 |

Below the table, there is a 'List of currently stored media' button. To the right of the table, there is a signature image and a disclaimer: 'Disclaimer: Goods received Name: Steven Brown Date: 04/03/2024 10:44 Check-sheet:'. On the far right, there is a vertical toolbar with buttons: 'Open' (highlighted with a red box), 'Add File', 'Add Video', 'Replace', 'Remove', 'Add Scan', 'Replace Scan', 'Set Default', 'Move Up', and 'Move Down'. At the bottom of the interface, there are 'Edit' and 'Done' buttons.

- Attached images are displayed in the Media tab.
- This includes images that were attached and signatures that were completed.
- You can open up any image using the **Open** button on the right-hand side of the screen.



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Viewing in Desktop Platinum Advisories

Advisories

The screenshot shows the 'Job Properties' window for Job 47, 'Perry Stewart (Y1 088, boat desc.) Job for testing check sheets'. The 'Unit' section is highlighted with a red box around the 'Advisories' button, which is labeled 'Work outstanding'. Other sections include 'Accounts', 'Job details', and 'Schedule'.

| Section | Field | Value |
|-------------|---------------|--|
| Accounts | Keeper: | PER001 |
| | Address: | Perry Stewart 34 Fake Close Faketown Fakeingham FA14KE |
| | Phone: | 07342221502 |
| | Invoice acc.: | PER001 Perry Stewart |
| Job details | Description: | Job for testing check sheets |
| | Status: | BI Booked In |
| | Reference: | |
| | Depot: | STOCK General Stock Depot |
| Unit | Unit: | 1 |
| | Mileage: | 0 |
| | Registration: | Y1 088 |
| | Description: | boat desc. |
| Schedule | Received: | 04/03/2024 |
| | Start: | 04/03/2024 |
| | Due: | 04/03/2024 |
| | Hours: | 1.00 |

- Any advisories logged when completing a check sheet are also displayed in the Advisories area of Job Properties.
- Click on **Advisories** to see more detail of what has been logged on the check sheet against a workshop job.

Advisories

The screenshot shows the 'Workshop Advisory Work' application window. It features a top navigation bar with 'Exit', 'Proceed', and help icons. The main content is divided into three sections: 'Unit', 'Current job', and 'Advisory work'. The 'Unit' section shows 'Unit: 1' and 'Keeper: WOR001'. The 'Current job' section shows 'Job: 47'. The 'Advisory work' section contains a table with one row: '04/03/2024', 'Immediate', '04/03/2024', 'PC2', 'Tyre Issue', and 'Advisory logged, urgent work required'. To the right of the table are buttons for 'Edit', 'Add', 'Remove', 'Allocate', and 'Un-allocate'. The 'Edit' button is highlighted with a red box. At the bottom, there is a 'Print' section with 'Current' and 'All' buttons, and a 'Close' button.

| Date | Priority | Due Date | Code | Description | Notes |
|------------|-----------|------------|------|-------------|---------------------------------------|
| 04/03/2024 | Immediate | 04/03/2024 | PC2 | Tyre Issue | Advisory logged, urgent work required |

- The Advisory is shown in more detail with the results from the check sheet.
- You can select **Edit** to make changes to the advisory that has been saved.

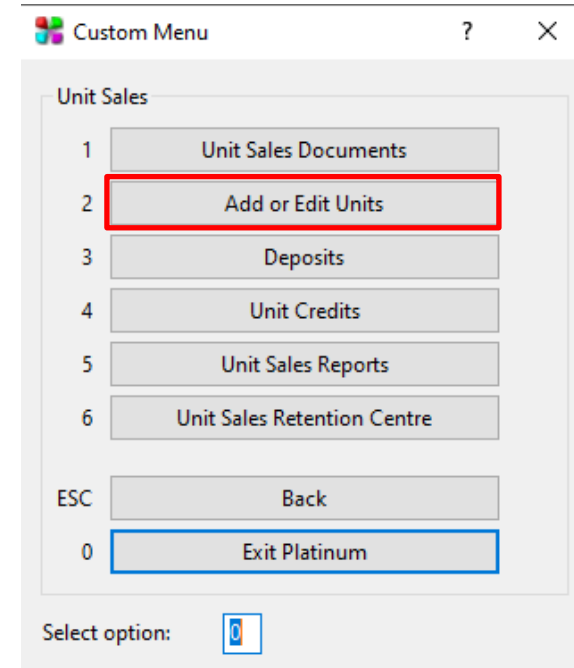
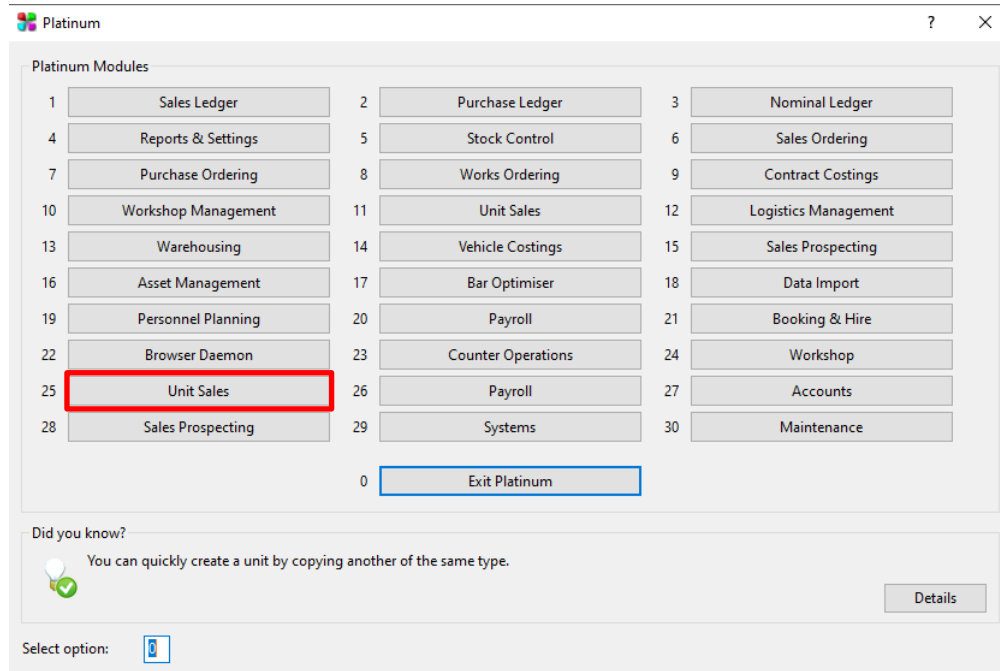
The screenshot shows the 'Advisory Item Properties' dialog box. It has a top navigation bar with 'Exit', 'Proceed', and help icons. The dialog is divided into several sections: 'The problem', 'Time scale', 'Allocated job', and 'Remedial action taken'. The 'The problem' section shows 'Date recorded: 04/03/2024', 'Problem code: PC2 Tyre Issue', 'Priority: Immediate', and 'Note: Advisory logged, urgent work required'. The 'Time scale' section shows 'Remaining: 0 Mileage', 'Time remaining: 0 Months', and 'Due date: 04/03/2024'. The 'Allocated job' section shows 'Job: 0'. The 'Remedial action taken' section shows 'Remedy code: No remedy set' and 'Date: 00/00/0000'. At the bottom, there is a 'General notes' checkbox and a 'Done' button.



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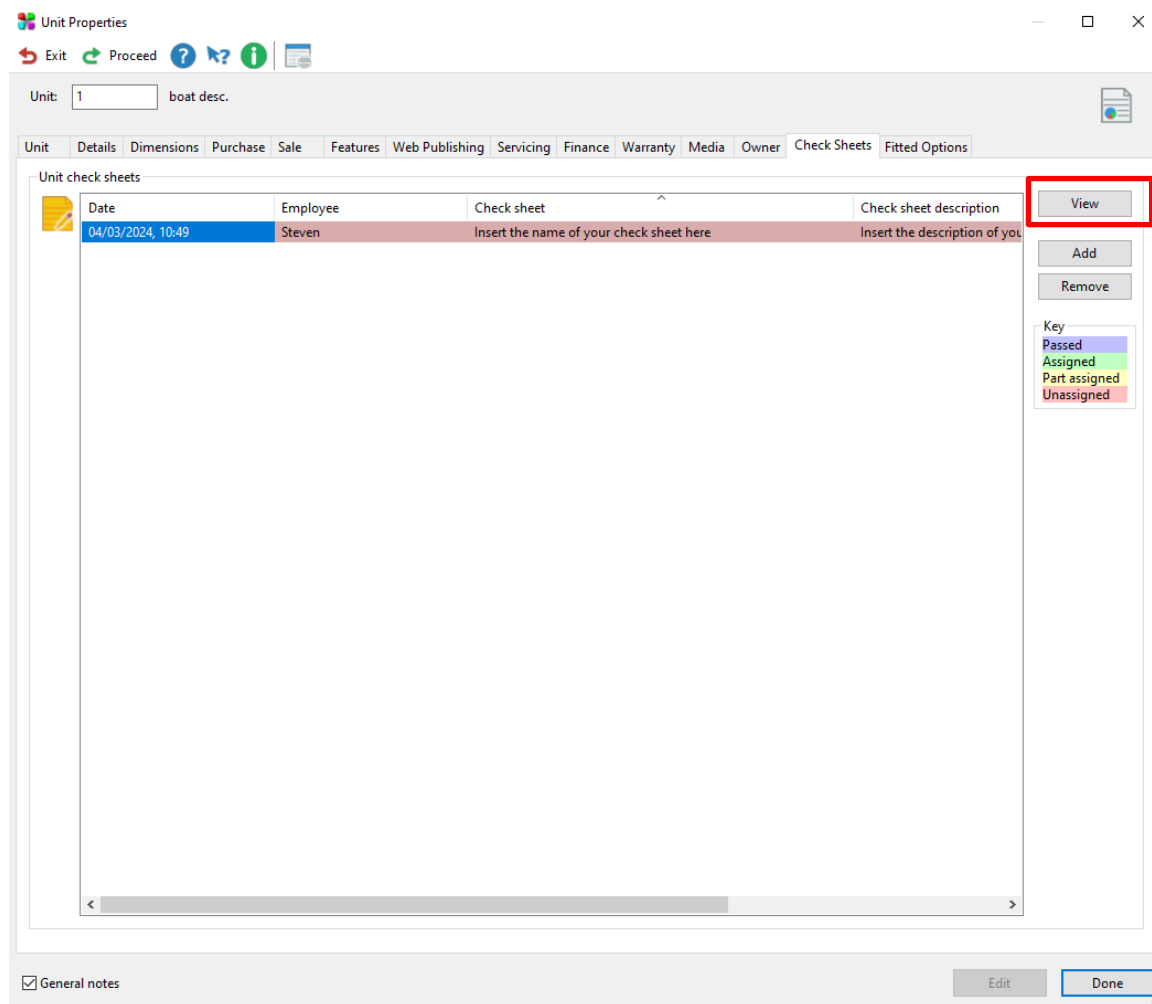
Viewing in Desktop Platinum Unit Properties

Unit Properties



- Completed check sheets can also be viewed against the **Unit Properties** area in Desktop Platinum. To access this Area select the Unit Sales area and the **Add or Edit Units** button.
- Check sheets completed in the **Check Sheets Search** and against a Job in **Technician Activity** will be shown here.

Unit Properties



- Navigate to the check sheets tab and select the check sheet you wish to view.
- Select **View** to open the **Check Sheet Details** screen.

Unit Properties

Check Sheet Details

Unit: 1 boat desc. Check sheet: Insert the name of your check sheet here
Insert the description of your check sheet here

Details Media

Associated media

| I | Type | Cate... | Category description | Publish | Name | Order |
|---|-------|---------|----------------------|---------|--------------|-------|
| | Image | | Uncategorised | Default | Image 1.jpeg | 1 |
| | Image | | Uncategorised | No | Image 2.png | 2 |
| | Image | | Uncategorised | Yes | Image 1.jpeg | 3 |

List of currently stored media

Disclaimer: Goods received
Name: Steven Brown
Date: 04/03/2024 10:05
Check sheet:

Open

Add File
Add Video
Replace
Remove
Add Scan
Replace Scan
Set Default
Move Up
Move Down

Edit Done

- Attached images are displayed in the Media tab.
- This includes images that were attached and signatures that were completed.
- You can open any image using the **Open** button on the right-hand side of the screen.

End of User Documents