



Merry Xmas from the Agency Works!

12 Top Tips for Christmas!

On the first day of Christmas my Super User sent to me:

- 1. Recent items** - If you want to quickly find a job or opportunity that you were recently viewing, click on "recent items" just under the job search box at the top of the left hand tool bar.
- 2. Auto close menu groups** - Too many menu groups open at once in the tool bar? Change your preferences to "auto close". Go to the footer of the tool bar and click "options" & select "Preferences".
- 3. Batch update facility** - From the Job List screen, multi select jobs that need to be updated and then click on the "Actions" button at the top right hand corner of the screen to access Batch Update functions. Chose from due dates, Handler etc.
- 4. Append estimate lines to quote** – Add an extra line to your quote without losing any of the wordings you have created. Go to the estimate tab of the phase and add your new estimate item. Highlight this new item and, click on the "actions" button and select 'append additional item to quote'
- 5. Use of the percentage bar on the job list** – View estimated to actual costs, or just look at hours. Set your job list view with jobs most over budget at the top.
- 6. Activities** – view your activities in date order by clicking on the 'Due' header.
- 7. Reverse timesheet entries** – correct errors on timesheets both via the web and main 4D system. Go to the timesheet list and select a group of entries and click Actions 'reverse time entries'
- 8. Opening a new opportunity or job based on an existing one** – copy previously created formats by finding the opportunity that you wish to duplicate and highlighting it. Click new job 'based on xxx'.
- 9. Quick links with one click** - quick links for you to access client records, jobs, suppliers. Go to the top left hand corner of a job and click on the client name to navigate quickly from the job to the client record.
- 10. Self populating your user name** - select your user name in data fields with one click
- 11. Transferring costs** - costs can be transferred between phases on the same job or, to a phase on a different job. Restricted access.
- 12. Setting "Non-working days"** - removes the task of remembering to book these days on the timesheet. Restricted access within file maintenance – non working days.



Any questions? Please contact The Agency Works at
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Merry Christmas!