Property Workflow App

Introduction

KEYPrime Workflow App allows off site contractors and staff to receive and update work items assigned to them from one or more estate. The app can be run on both Android and iOS (Apple) devices.

Setting Up

The module for KEYPrime Workflow must first be purchased from Landmark Systems as an optional additional Property module, it requires the Diary Alerts module to be purchased.

Please contact the Landmark office on 01798 877100.

There are 3 parts to setting up for KEYPrime Workflow apps

1. Setting up the company details on the Landmark Web Service.
2. Configuring the database and connection to the Landmark Web Service.
3. Installing the App on devices and granting user permissions.

Setting up the company details on the Landmark Web Service

This part of the process is carried out by Landmark staff we will need to collect some basic information from you in order to add the company information to our Landmark Web Service. At the same time the registration code for the module will be provided and configuration can begin.

Registering the new module

Once you have received the new Licence Key from Landmark enter a valid Property Admin user login and password, select the Property Company and choose Register Company from the Administrator menu.

Enter the Licence Key sent by Landmark in the fields and press ok. If the Key has been emailed, you can copy and paste the Licence Key as a whole on to the form, and press OK.
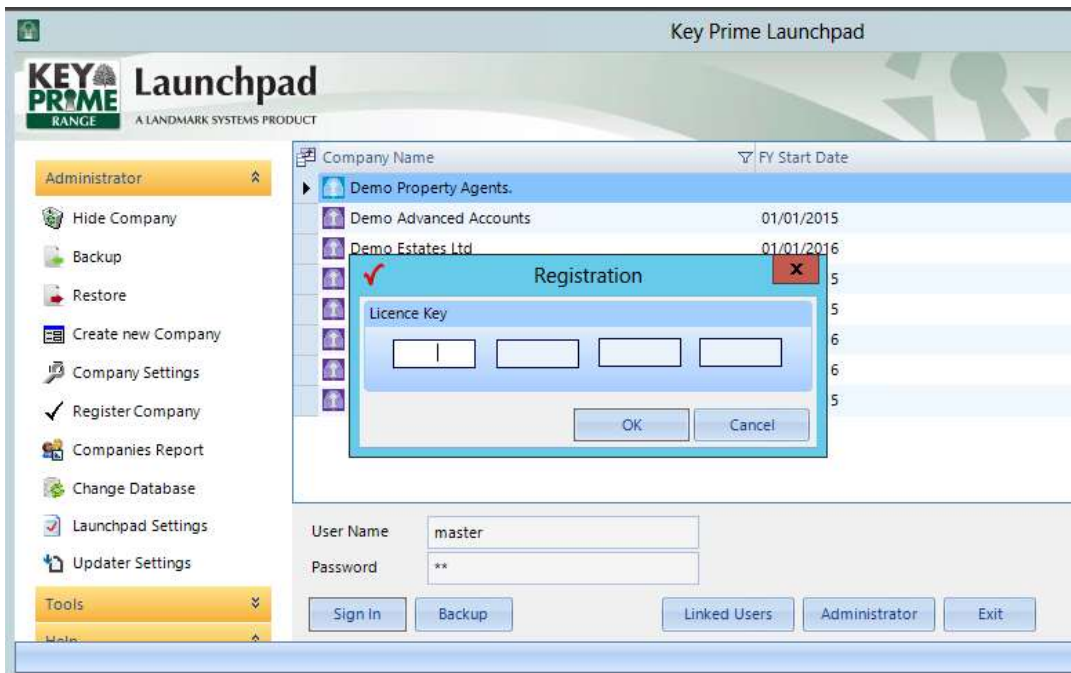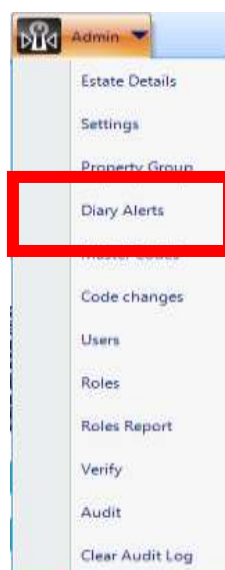
Once the process is successful you will get the following message. This is a good point at which to take a backup of your data.


Configuring the database and connection to the Landmark Web Service

In Property open the Admin Menu and select the Diary Alerts option.

On the screen ensure that the Enable Diary Alerts option is checked so that you can check the Enable Handheld Configuration. The Sync Interval is how often the local database sends and

receives data to the Web Service. You may wish to set this at 1 minute initially. Over time you can decide to reduce the frequency depending on how many work items are being managed and how frequently.
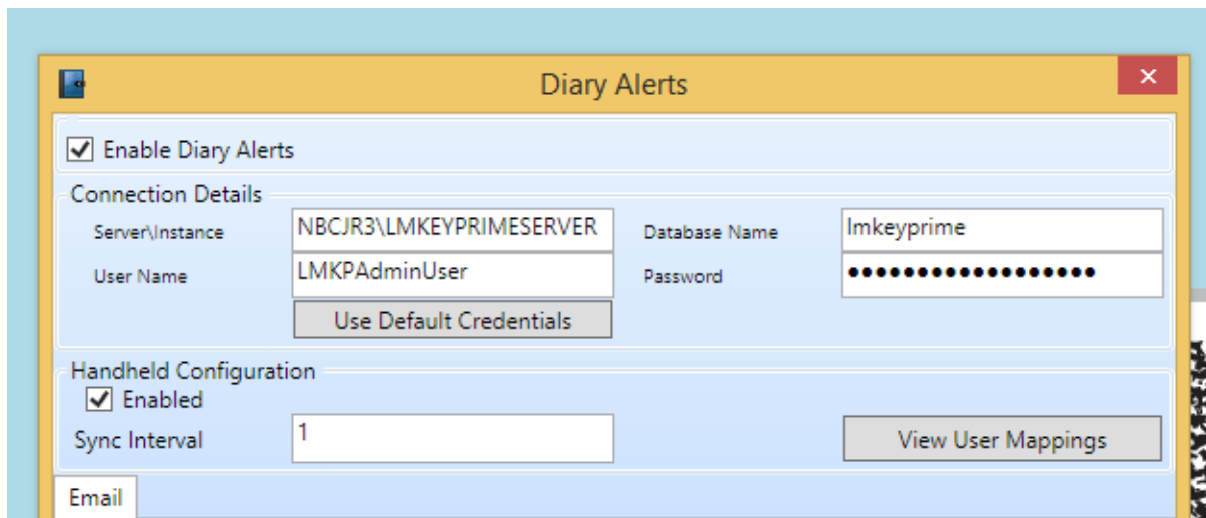
Save the settings and wait at least 1 minute before clicking on the View User Mappings.

Once the local database has updated the Landmark Web Service, Unique External Login identifiers will be issued for all assignees and contractors, these unique identifiers can be supplied to the external users

Login Name	Username	External Login	Works Manager
ADMIN	Administrator	416438	N
MASTER	LMAdministrator	294736	N
ANDY	Andy	967690	N
DEMO	Demo User	101652	N
DIARYM	Diary Manager	305394	N
READ	Read Only	102330	N
PLUMB	Mr J S Penn	666448	Y
ELECT	Mr A Sparks	888902	Y
MARY	Mrs M Leadbetter	865984	Y
DEM	Demo Estate Agent	914680	Y

Installing the App on devices

External users can now go to the App Store or Android Play Store, where they can search for KEYPrime Workflow and download onto their device.

Once installed open the App and enter their unique login code as provided from the list of External Logins earlier.

Users may have more than one Login on the same device, for example if they work on two Estates with KEYPrime Property.

The same Login number should not be used on 2 separate devices, otherwise confusion may occur if the same record is edited by two users before it has synchronised.

Configuring the device

Device users can customise what they see and how the device works for them.

Display settings.

The data to display on the device can be restricted by date range or number of days in the past or future, the smaller the range the easier it will be to navigate the work items.

The details of each work item to be displayed are chosen for 4 sections (Line 1-4), the options for each are:

None,
Assignee,
Contractor,
Company,
Company and Assignee,
First line of address,
Postcode, Subject,
Work Item Description

All outstanding work items assigned to the user can be included, regardless of past date.
If required the time for each Work item can be shown on the date fields.

The work list can use the same colour and indicator scheme as the KEYPrime Property diary.
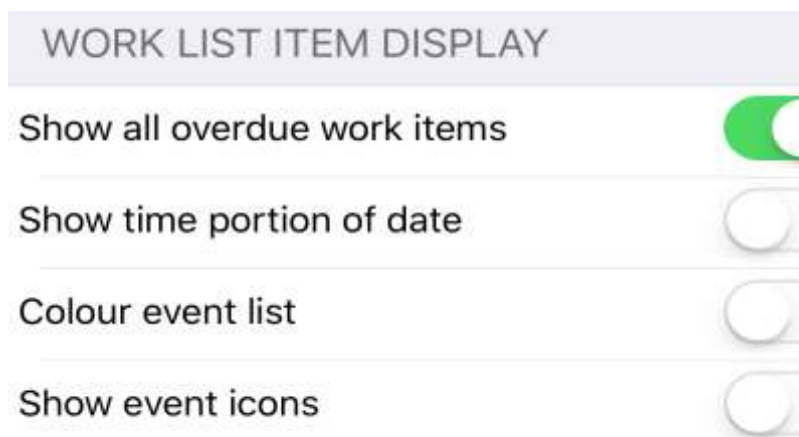

Work Items

The work items list shows all items assigned to the Login user number with in the settings previously entered.
The list of work items is updated using the refresh icon. This can be set to only work when connected to wifi, or using mobile data.

The list shows the fields as chosen in display settings, the first date on each work item is the date it was created. The second is the date it is due.

Selecting the item from the list will show the full details as below.
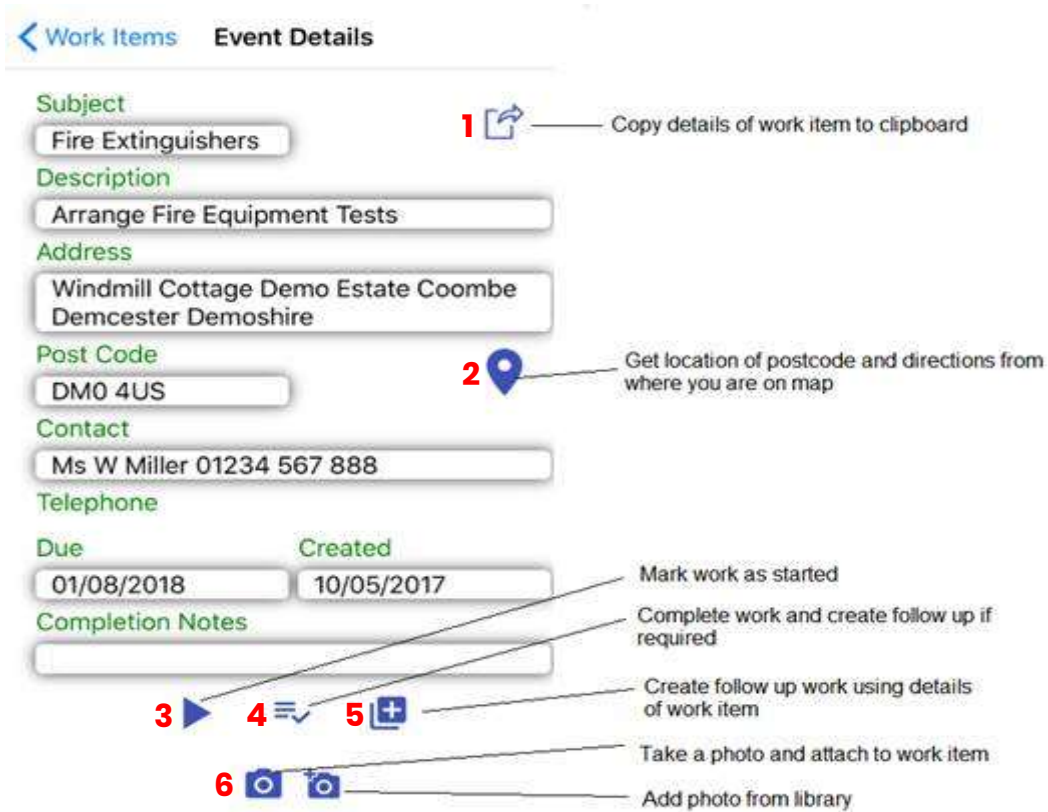
1. The details of the item can be copied to the clip board for pasting into another app on the device, e.g. email or notes, using the share icon.

   These details are simply laid out with a brief description followed by the information.

   In this case the phone number is identified and can be dialled by selecting it, after pasting to Notes.

2. By selecting the postcode finder icon. The app will find the property on the map and provide directions to it using the default mapping App on the device.

   The contact for the property can be dialled simply by selecting the Telephone field when available.

Completion notes can be added to the item by entering from the keyboard or using the dictation option convert speech to text depending on preference.

3. The Start Icon. Helps the contractor to indicate when the work item was begun,
4. And once finished the item can be marked as completed. At this point a follow up work item can be created using the details of the original item.
5. A follow up work item can be created for incomplete items by selecting the icon
6. Images can be attached to work items, using the camera, or from the picture library.

Where images are attached the image icon ⊡ allows you to view them, these images are synchronised back to the main database and save as documents attached to the work item.

Work items are synchronised with the main database when the refresh is selected.

Follow up events are assigned to the user Unknown and will be set with a due date 7 days ahead of the original due date, they will appear in the main diary when synchronisation has taken place and the diary is also refreshed.

	Due Date	Subject	Description	Property Name	Assigned to	Created by
✓	09/08/2018	Gas Certification	CORGI Gas certification	The Bull Inn	Andy	LMAdministrator
	16/08/2018	Follow up for Gas Certif	Created as follow up	The Bull Inn	Andy	Unknown