

POWERED BY

Keepstrack
WORKFLOW MANAGEMENT SYSTEMS

Oakleafe 

Keepstrack User Guide

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How to use Keepstrack software

Logging In

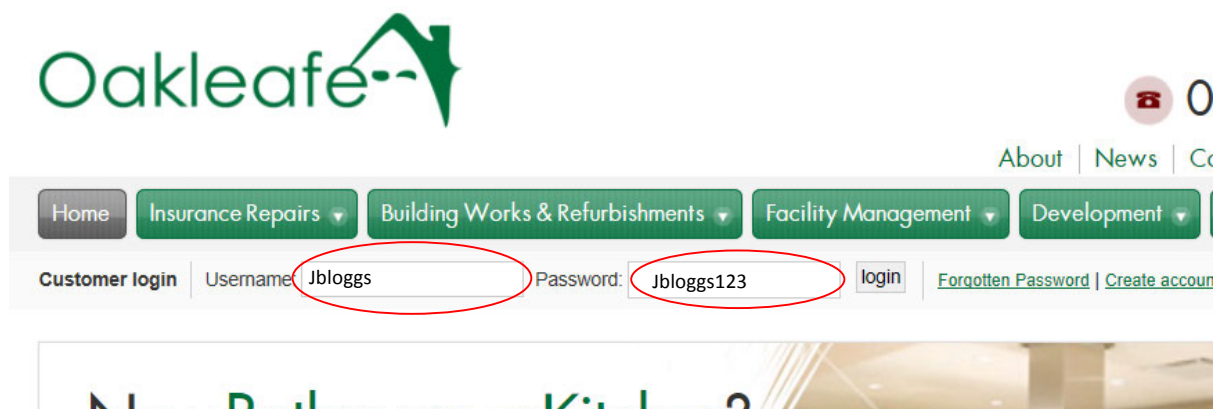
There are two ways that you can log in to the *Keepstrack* account.

Go to www.oakleafeltd.com and at the top of the home page is two boxes.

The first box is to input your user name. This is in a format of your initial followed by your surname. i.e. for Joe Bloggs it would be jbloggs.

In the second box is your password. This will have been automatically set to the same as your username i.e. jbloggs plus the numbers 123 so your default password is initial followed by surname followed by 123.

Click – ‘Login’ to log in



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Customer login Username: Password: [Forgotten Password](#) | [Create account](#)

New Bathrooms or Kitchens?

Workflow Main Hub

Once logged in you will see all active jobs with us that you are assigned to and the individual stages that it is at:

Search Address Archive? (0)

Workflow Manager Click to view

My Current Workloads

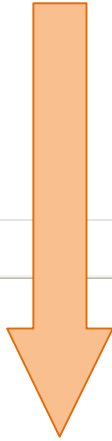
OUTSTANDING TASKS:		1
Idle Claims (No Activity within the last 7 Days)		0
ACTIVE CLAIMS:		1
Admin Set Up		0
Stripping Out		0
Drying Out		0
Reinstatement		1
Completion - Awaiting Payment		0
COMPLETE CLAIMS:		0

By clicking on any of the bars where you are involved in the job you will access this screen.

This is what you need to respond to – it will have a message attached to the task for you

This section shows you what stage the job is at

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Outstanding Tasks Click to view

CLAIM	POSTED BY	DATE	TIME	DESCRIPTION	ACTION
TBA - Steve Sanders - [REDACTED] ZGY	Lee Goodwin	07/03/2010	12:10:29	Please proceed with the stripping out of the property as per spec provided - cost as agreed	<input type="button" value="Respond"/>

This lists all tasks. It may be that the policy holder has requested we contact you regarding an aspect of the claim. In the description it will tell you the message for which you can respond to and acknowledge or make other comments.

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Buttons Overview

This is a sample of the screen you will get once you hit the respond button. As you can see you have access to 3 buttons.

1 Add task

2 View Files

3 Report

My Account | Support | Log Out

Search Address SEARCH Archive? (0)

CLAIM REF. TBA NAME. Steve Sanders ADDRESS. 11 Fair oak Place POSTCODE [REDACTED] TEL [REDACTED]

Date	Time	Item	Posted By	Action By	Description
CURRENT TASK					
			Lee Goodwin	Lee Smith	Please proceed with the stripping out of the property as per spec provided - cost as agreed
07/03/2010	12:10:29	Task	Lee Goodwin	Lee Smith	Please proceed with the stripping out of the property as per spec provided - cost as agreed
25/02/2010	17:31:34	Status Change	Lee Goodwin	NOTE	Status Changed to Reinstatement

Your Response?:

Adding A Task



Add Task – if you need to message us or task us to do something then this is where you do it. It can be a reminder or a request etc. This will then pop up in our outstanding task box which we can then act upon. An email is sent to the person selected as well to inform them that they have been tasked.

All tasks and notes are logged in the report which is seen by all for reasons of transparency.

My Account | Support | Log Out

Search Address [] SEARCH Archive? (0) Workflow

CLAIM REF. TBA NAME. Steve Sanders ADDRESS. 11 Fair oak Place POSTCODE. [] TEL []

+ Add Task

Action by []

Description []

Angry(Red) Important(Bold) Spellcheck

EXIT SAVE & EXIT

You need to select the person you are tasking from the drop down box. Type in your message in the description box.

If it is urgent or needs to be brought to everyone's attention you can make the text angry (red) and important (bold) by ticking these boxes.

There is even a spell check button to help with errors. Once done click save and exit.

Remember all text and messages are logged in the report and everyone can see its content to be completely transparent.

View Pictures & Documents











View Files – This is where you can view live documents, pictures or files relating to the works. You will need to have your document saved as a word document or PDF to upload or scan in a document and upload the scan. This is a private section for sensitive documents that only you and the office can for reasons of data protection.

Please note the first time you view any files you will be prompted and must agree to install & update to latest Java application in order for this aspect to work (It may be that your computer already has the latest version in which case you will automatically see the boxes below).

Click on the image/document to open full screen

Search Address SEARCH Archive? (79)

 <u>EOW 18 Farne Drive - 1270 005.jpg</u>	 <u>EOW 18 Farne Drive - 1270 006.jpg</u>	 <u>EOW 18 Farne Drive 001.jpg</u>	 <u>EOW 18 Frne Drive - 1270 002.jpg</u>
 <u>EOW 18 Frne Drive - 1270 004.jpg</u>	 <u>EOW 18 Frne Drive - 1270 007.jpg</u>	 <u>EOW 18 Frne Drive - 1270 009.jpg</u>	 <u>EOW 18 Frne Drive - 1270 010.jpg</u>

If you accidentally click 'No' then you can download the viewing software at:

<http://java.com/en/download/installed.jsp?detect=jre&try=1>

The Log & Report



The report button generates a PDF report of all notes and logs input by everyone to do with the job. This can be printed off and is useful for site meetings and paper records



[My Account](#) [Support](#) [Log Out](#)

Search Address Archive? (0)

CLAIM REF. 3524080 NAME. Steve Saunders ADDRESS. 11 Falcoaks Place POSTCODE [REDACTED] TEL. [REDACTED]


[+ ADD TASK](#) [DETAILS & PRICE](#) [REPORT](#) [BACK](#)

Date	Time	Item	Posted By	Action By	Description
08/03/2010	09:45:53	Entered	Lee Goodwin	NOTE	Input into system

The Workflow – Heart of Keepstrack

Remember click **workflow** at anytime to get to the workflow manager to choose or view individual jobs. This is the hub of your job allocations.

Search Address Archive? (0)

 **Workflow Manager**

[WorkFlow](#)
Click to view

My Current Workloads	
OUTSTANDING TASKS:	1
Idle Claims (No Activity within the last 7 Days)	0
ACTIVE CLAIMS:	1
Admin Set Up	0
Stripping Out	0
Drying Out	0
Reinstatement	1
Completion - Awaiting Payment	0
COMPLETE CLAIMS:	0

Changing your Email or Password

My Account

Click on the 'My Account' button

CLAIM REF. TBA NAME. Steve Sanders ADDRESS. 11 Fair oak Place POSTCODE TEL.

+ Add Task

Action by

Description

Angry(Red) Important(Bold)

Spellcheck

EXIT SAVE & EXIT

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By clicking on 'Change' you can change your personal email or password settings

My Account

Password	*****	Change
Email Address	LeeGoodwin@oakleafeltd.com	Change
New Access Key	Add	

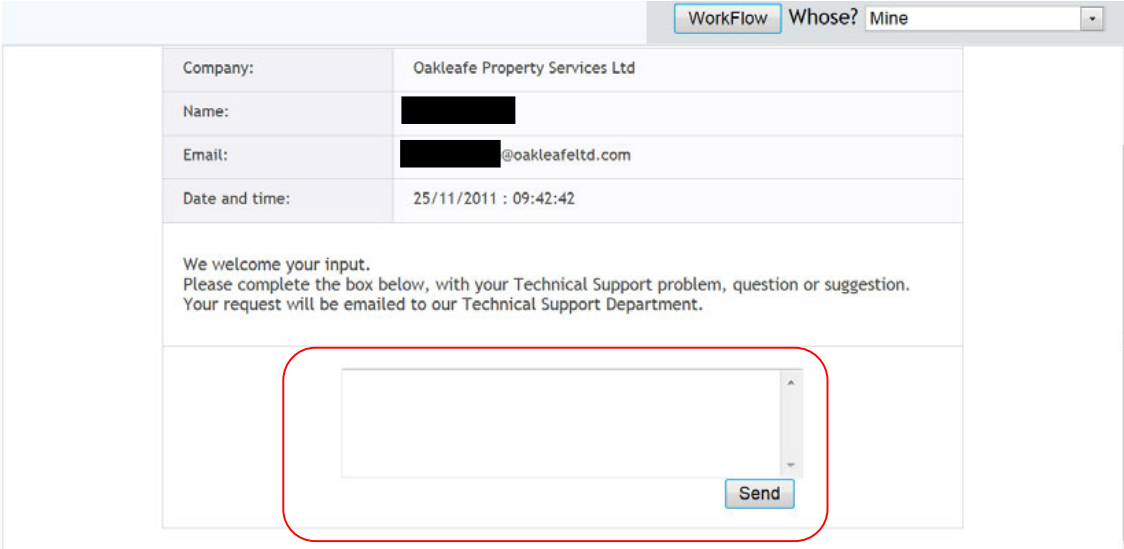
Support

It is very rare that you will require support however if you do call us on

0208 517 7111

as most issues can be dealt with internally very quickly

In the unlikely event we are unable to help - by filling out this box then hitting 'send' the software administrator will receive your message and will assist on any software related problems



Workflow Whose? Mine

Company:	Oakleaf Property Services Ltd
Name:	[REDACTED]
Email:	[REDACTED]@oakleafeltd.com
Date and time:	25/11/2011 : 09:42:42

We welcome your input.
Please complete the box below, with your Technical Support problem, question or suggestion.
Your request will be emailed to our Technical Support Department.

[REDACTED]

Send

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Log Out

Hit the 'Log Out' button

Log Out

to exit the software