

Database SUGGEST

Database Instruction manual.

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1

Installation of the Digital Sweeps database

The Digital Sweeps database can be downloaded from <http://www.digitalsweeps.co.uk/download.html>

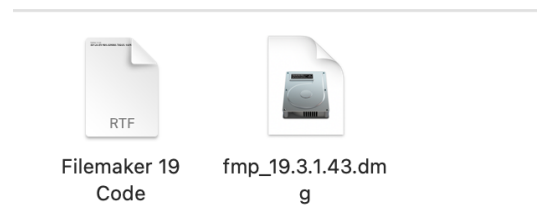
Step 1. Download and install Filemaker 19



Filemaker 19 Software for Mac Computers


Filemaker 19 Software for Windows Computers

Download in install the version for your computer. Once the file is downloaded, unzip the file and install the software. Install the full version and use the provided code which came in the folder.



Once Filemaker is installed then download the Digital Sweeps Database

Step 2. Download and run Digital Sweeps



Digital Sweeps Customer Management System

2

How to get the database on an iPad or iPhone

On your iPad or iPhone you will need to download the Free “Filemaker Go” app

Download the latest version of FileMaker Go that your iOS version supports

You will also need to download the latest version of [Apple iTunes](#) on your main computer

3

Sync page

Please follow these steps carefully until you know the process fully



Connect your iDevice to your computer

1. On the main "Digital Sweeps page" click "Export Data"

This will create a file called iDeviceFile.fmp12 in the same location where the digital sweeps file is kept.

2. Transfer this iDevicefile to the iPad via the following methods

Via Cable

Plug your iPad into the computer and transfer the file using iTunes

Dropbox or similar

[Return to Table of contents](#)

Save the file to a folder in Dropbox, On your ipad navigate to this folder and click the file to open it in FileMaker go.

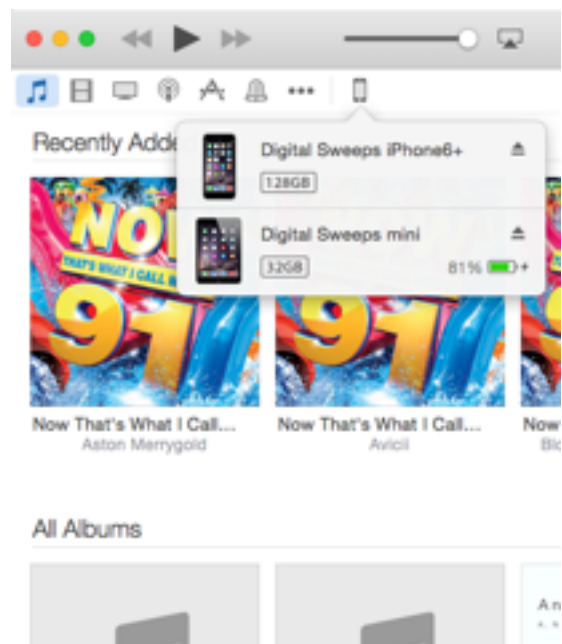
Airdrop

Right click on the file and choose share with airdrop. Choose the iPad and click continue. Then open the file on the iPad with filmmaker go.

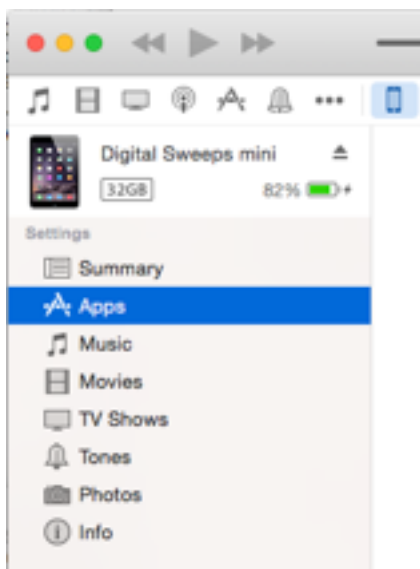
For Windows computers

To transfer the file from the main computer to the iDevice with iTunes

1. Connect your iDevice to your computer
2. Open iTunes on your computer not the iDevice
3. Pick your iDevice from the available icons.



4. Now highlight apps



5. The apps section will now show up in the window
6. Highlight the FileMaker go app on the left and the files will be displayed on the right.

Please Note these instructions may change slightly depending on the latest version of iTunes

7. To add your database click the add button and point to where you saved the Digital Sweeps folder

8. If you have someone else continuing to book work in while you at work then Choose the “iDevice

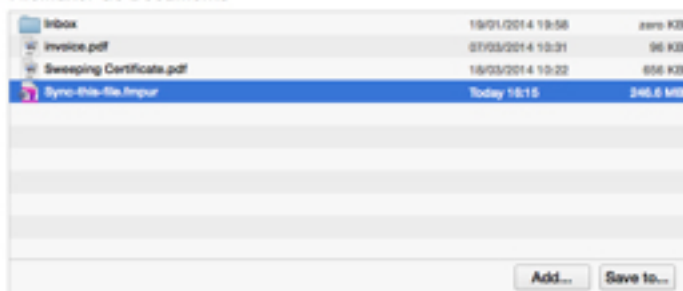
File Sharing

The apps listed below can transfer documents between your iPad and this computer.

Apps



FileMaker Go Documents



File” icon

9.If you ONLY work by your self or if you only want the database on your iDevice then choose the Digital Sweeps.Fmpur File

10. If an information screen appears asking if you want to replace an older version, click replace

11.Wait until the file has synced before disconnecting the iDevice

12.If you want to sync to multiple iDevices connect the next iDevice and transfer the iDevice File to each device (Maximum of 10).

4

Sync data Back to the computer

Transfer the iDevice file back to the digital sweeps folder

Via cable

Connect the iPad to the computer and using iTunes or the Mac finder window select the iDevicefile.fmp12 and move it the the Digital Sweeps folder.

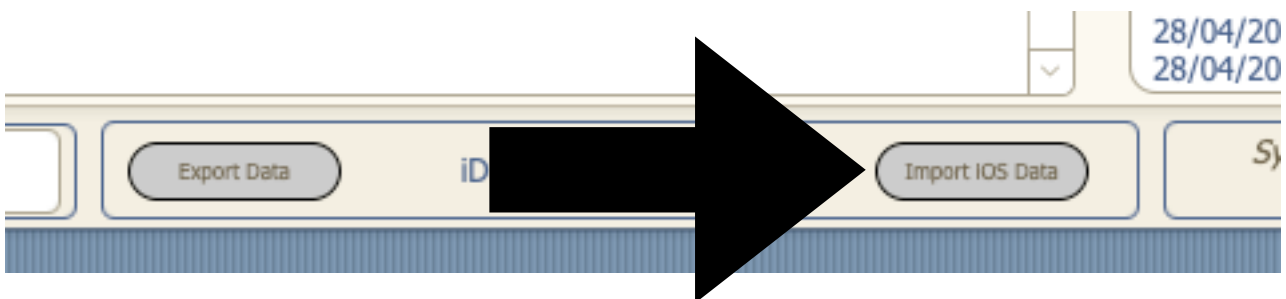
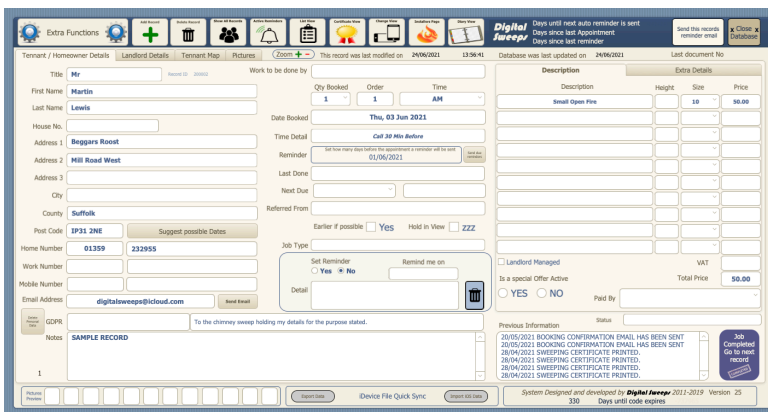
Via Dropbox

On the iPad select the dropdown box on the top left of the screen and click Save/Send as select Database and click continue select Dropbox or similar and navigate to the digital sweeps folder on the computer.

Via Airdrop

On the iPad select the dropdown box on the top left of the screen and click Save/Send as select Database and click continue select airdrop and choose your mac computer

Once the file has transferred, open the database and click Import IOS Data



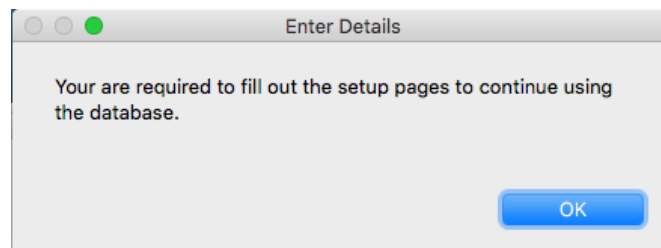
5

Setting up the database

1. Open the Digital Sweeps database

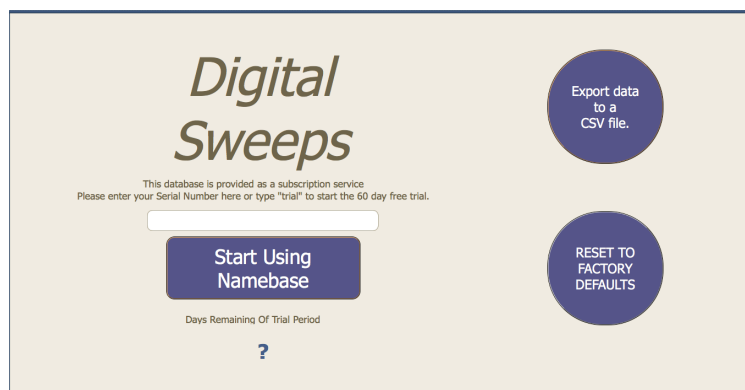


2. The database will ask you to set up your details. This must be done before you can use the database

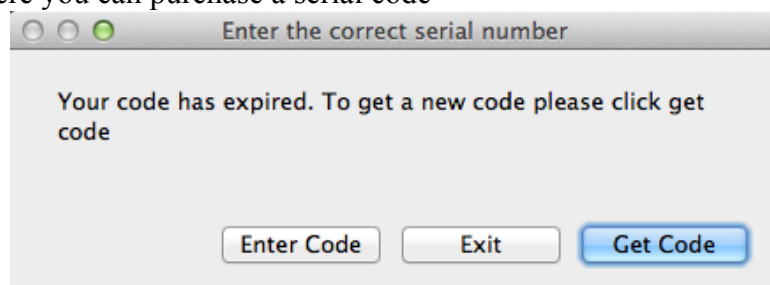


3. Once you have filled in all of your details click [“Back to Functions page”](#)

4. You will now be asked to enter your subscription code or start your trial period.



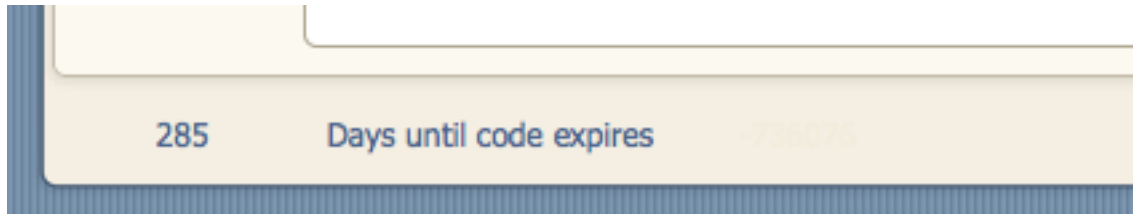
5. To obtain your code click “Get Code” you will be taken to <http://www.digitalsweeps.co.uk/download.html> where you can purchase a serial code



6. Once you have completed payment your code will be emailed to you.

7. Click “Enter Code” and type in your code and click “Start using Namebase”

8. You will need to get a new code each year to continue using the database. A date is displayed at the bottom of the main screen letting you know when your code will expire.



9. A new code can be purchased at any time during the year, you can enter a new code any time but we recommend doing it when the counter has less than 7 days remaining.

!!! IMPORTANT !!!

When you enter a new code the system resets to 365 days so if you enter a new code when there is still 180 days remaining you will lose those 180 days.

Only enter the code when prompted to do so.

6

Using the database. The Main Page

This is the main screen where your customer information is displayed.

The screenshot displays the main interface of the Digital Sweeps database. It features a top navigation bar with various icons for functions like 'Add Record', 'Delete Record', and 'Zoom'. The main area is divided into several sections:

- Customer Details:** Fields for Title (Mr), First Name (Martin), Last Name (Lewis), House No., Address 1 (Beggars Roost), Address 2 (Mill Road West), City, County (Suffolk), Post Code (IP31 2NE), Home Number (01359 232955), Work Number, Mobile Number, and Email Address (digitalsweeps@icloud.com).
- Booking Information:** Includes 'Work to be done by', 'Qty Booked' (1), 'Order' (1), 'Time' (AM), 'Date Booked' (Thu, 03 Jun 2021), 'Time Detail' (Call 30 Min Before), 'Reminder' (01/06/2021), 'Last Done', 'Next Due', and 'Referred From'.
- Job Details:** A table with columns for Description, Height, Size, and Price. The first entry is 'Small Open Fire' with a size of 10 and a price of 50.00.
- Additional Options:** Checkboxes for 'Landlord Managed', 'Is a special Offer Active' (YES/NO), and 'Paid By'.
- Notes and History:** A 'Notes' field containing 'SAMPLE RECORD' and a 'Previous Information' section listing booking confirmation and certificate printing dates.

You can enter information in each field by clicking on a field then typing in the information.

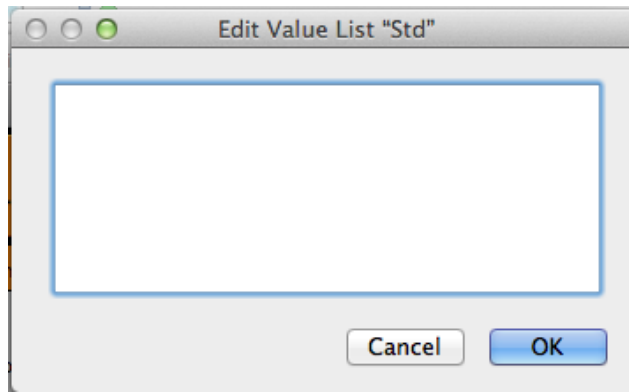
Some boxes work as a drop-down list to save on typing.

To build your drop-down list click the field and go to the “edit” section and build your own list

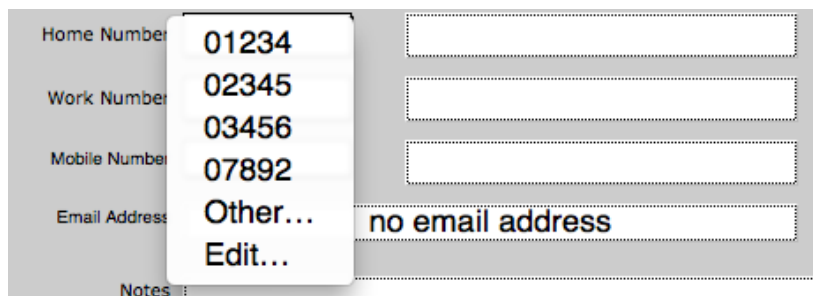
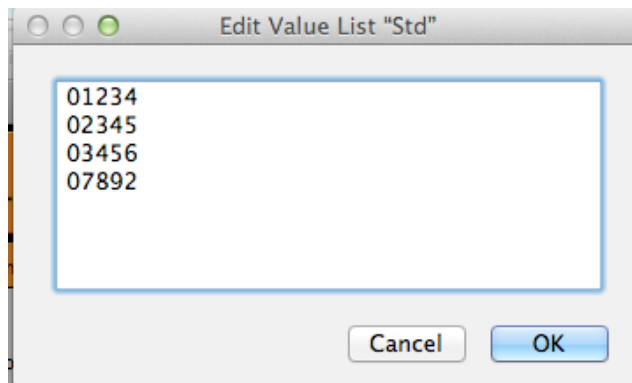
This close-up shows the form fields for 'Post Code', 'Home Number', 'Work Number', 'Mobile Number', and 'Email Address'. A dropdown menu is open over the 'Home Number' field, showing two options: 'Other...' and 'Edit...'. The 'Email Address' field contains the text 'no email address'.

The “other” section lets you enter information without adding it to your drop-down list.

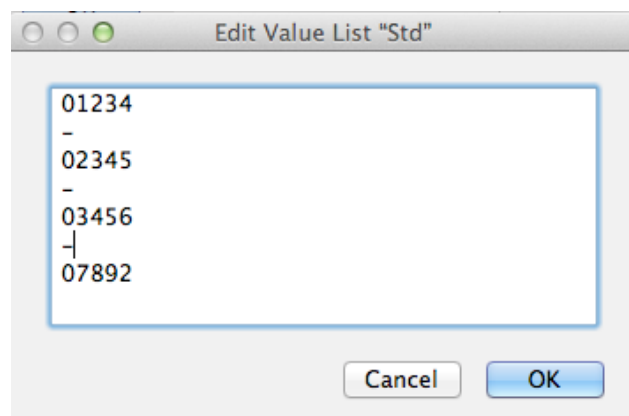
To build your lists click the “edit” section.



Enter each value on its own line



By adding a hyphen in between lines (-) this adds a separator line in the drop-down lists



The drop-down list will now look like this.

There are several fields with drop-down boxes to save typing common information all the time.

Some fields are called a radio box, this is a field that either is selected or not.

A screenshot of a web form with a dropdown menu open. The form fields are: Home Number (01234), Work Number (02345), Mobile Number (03456), Email Address (no email address), and Notes (Other... Edit...). The dropdown menu is positioned over the Home Number field and contains the following options: 01234, 02345, 03456, 07892, Other..., and Edit... The Home Number field is currently selected.

Here the reminder box is either set to yes or no.

A screenshot of a 'Set Reminder' dialog box. It features a 'Set Reminder' section with radio buttons for 'Yes' and 'No', where 'No' is selected. To the right is a 'Remind me on' text input field. Below these is a 'Detail' section with a larger text input field. A blue button with a white 'X' is located on the right side of the dialog box.

or here “Landlord Managed” is either selected or not.

A screenshot of a checkbox labeled 'Landlord Managed'. The checkbox is checked, indicated by a small 'X' inside the box.

A screenshot of a checkbox labeled 'Landlord Managed'. The checkbox is unchecked, shown as an empty square.

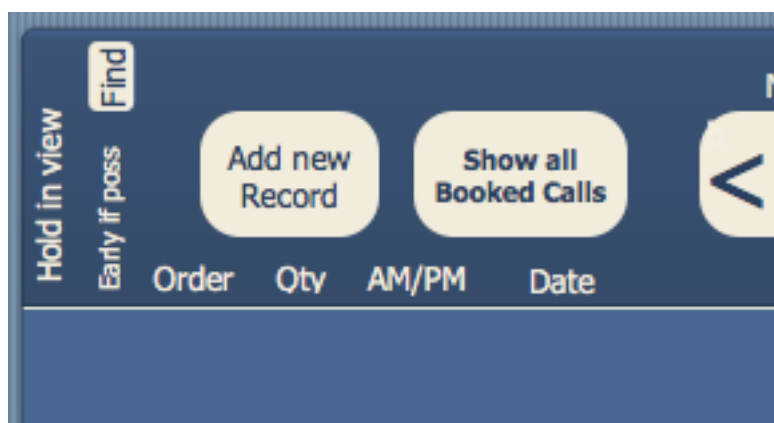
Some fields like “Landlord Managed” will automatically do other things when selected. This one when selected will take you to the Landlord page to fill in the required information.

A screenshot of the Digital Sweeps software interface. The top navigation bar includes 'Extra Functions', 'Add New Record', 'Delete Record', 'Show All Records', 'Active Reminders', 'Change View', 'Diary View', and 'Digital Sweeps'. Below this is a 'Tenant / Homeowner Details' section with a 'Landlord Managed' checkbox. To the right is a map view showing a location in the Ixworth area. A search box above the map displays 'We could not find...'. The bottom of the screen shows 'Days left of trial period: 60' and 'Database Designed and developed by Digital Sweeps 2012 Version 19'.

Fields like “Title” or “Address” are self-explanatory but we will go through some of the other fields, which are not that, self-evident.

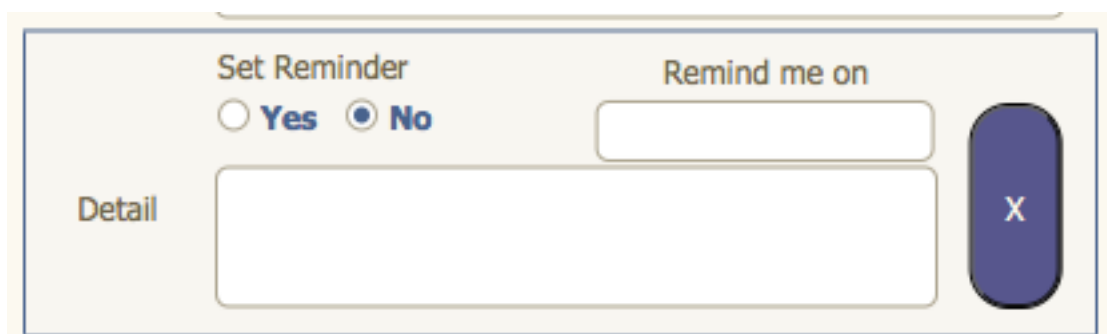
The middle column is where you enter date information, how many chimneys have been booked, where the customer got your details (For advertising tracking) and any reminders you wish to set for yourself.

1. **Date Booked.** This is where you set the date for the chimney to be swept. Before you can do this you must set a number in the “Jobs Booked” field
2. **Earlier if possible.** Click this radio box if someone has booked in but wants to be done earlier if a cancellation occurs. You can do a quick find of any customers who want to be done earlier by going to the diary page and clicking the “Find” button above the Earlier if possible at the top left of the screen. See Diary Page.



3. **Time.** This field lets you choose whether it’s a morning call or afternoon.
4. **Time detail.** If you want to allocate a more detailed time slot to a customer pick from the drop-down box, or add to the list.

5. **Last Swept.** This field keeps track of the last date you would have visited the property. This field gets filled in automatically if you use an iPad or iPhone.
6. **First Swept.** The first time you would have visited the property. This field gets filled in automatically if you use an iPad or iPhone.
7. **Next Due.** Enter a date in this field so searching for printable reminders are made easy. The date entered here must be month and year only. E.G. NOV 12 or JAN 13
8. **Refereed from.** Lets you keep track of where customers are getting your details. This will help you to find out which type of advertising works for you.
9. **Jobs Booked.** Set the number of chimneys a customer wants done. This is required to make the diary page and “End of day report” calculate properly.
10. **Order.** When in diary page the records are displayed by the order you set.
11. **Hold In View.** This is a quick way of searching for certain records you might want. Click the select box of records you want to view together, then search by typing zzz in the top right search field and only the selected records are displayed. Alternatively in the diary page any day you view will show any records that have been ticked.
12. **Job Type.** Use this field if you want to let the chimney sweep know what they are required to do for the customer. E.G. Sweep chimney but look at second fire or do smoke test only etc.
13. **Reminders.** By setting the reminder radio box to “Yes” and entering a date in the “Remind me on” field, a reminder window shows up every time the database is opened up for that day. Then just add your text in to the box with the things you want to be reminded about. If you don’t enter a date reminders can be viewed only by clicking the “Active Reminders” button on the main page.



The image shows a screenshot of a web form for setting reminders. It features a 'Set Reminder' section with two radio buttons: 'Yes' (unselected) and 'No' (selected). To the right is a 'Remind me on' text input field. Below these is a larger 'Detail' text area. On the far right is a blue button with a white 'X' icon, likely for closing the reminder window.

The right hand column below gives information about the chimneys the customer has, the size of chimney/Brush size required, height of the chimney and price for each chimney.

Appliance Type	Height	Size	Last Price £
Small Open Fire		10	50.00
Lined Woodburner			
Boiler Flue			
Double Sided Stove			
Open Inglenook			

Landlord Managed
 VAT £

Is special Offer Active Total Price £ **50.00**

YES NO
 Paid By

Status

Previous Sweeping Information

Job Completed
Go to next record

Database Designed and developed by **Digital Sweeps** 2011 Version 19

The “Customers Signature” field can only be filled in on an iPad or iPhone, as you will need a touch screen computer to capture a signature

“Previous sweeping information” This field displays previous visit dates, how many chimneys were done, the total price charged and how the customer paid. This field gets filled in automatically.

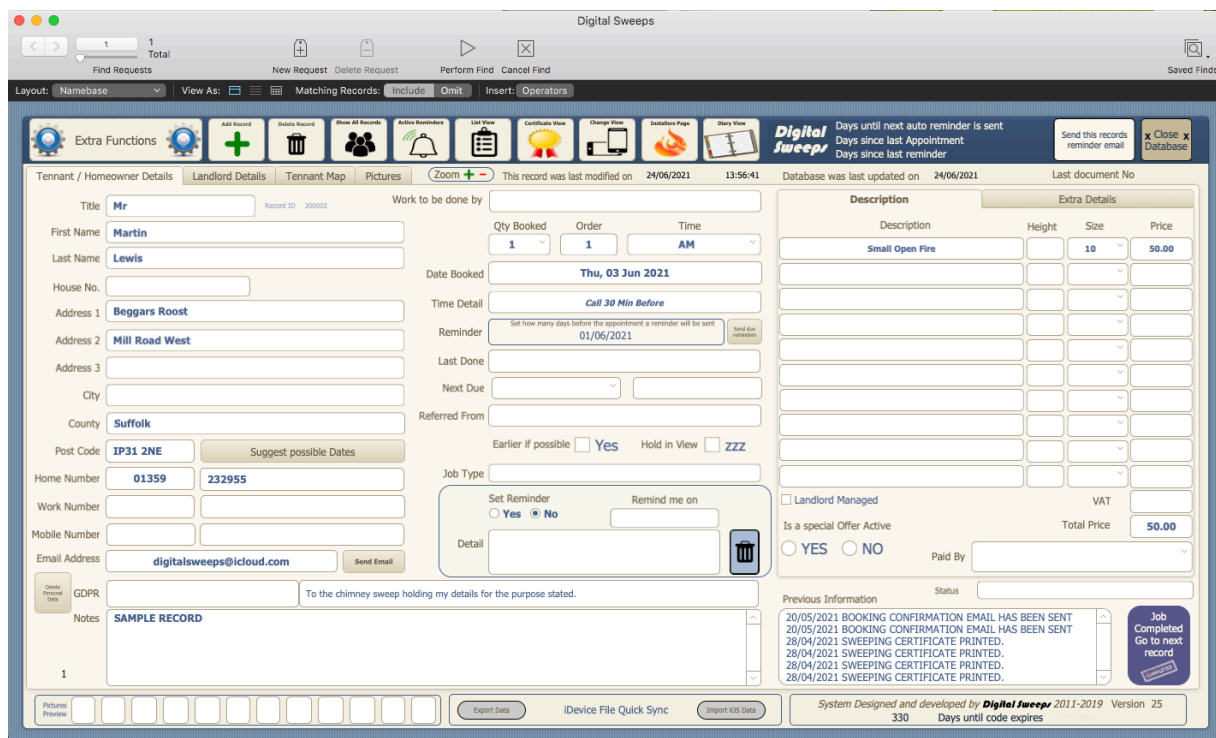
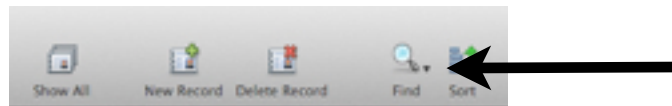
7

Find & Search Functions

The find and search functions can be done on any page only for the information that is displayed on those pages. i.e. you can't do a find or search on the diary page for appliance information as it is not displayed on that page.

The difference between a find request and a search request is as follows

To perform a find request on the main page click the find button at the top of the page



Your page will now look like this.

You can now enter your find requests in any field and the system will only look in that field for the result. You can find just a post code in the post code box or do a find for a specific post code and a specific last name. i.e. look for anybody with the last name of “Smith” (Last Name Field) who lives in “Suffolk” (County Field) once you have chosen your find request click the “Perform Find” Button at the top. The system will now only look at those two fields.

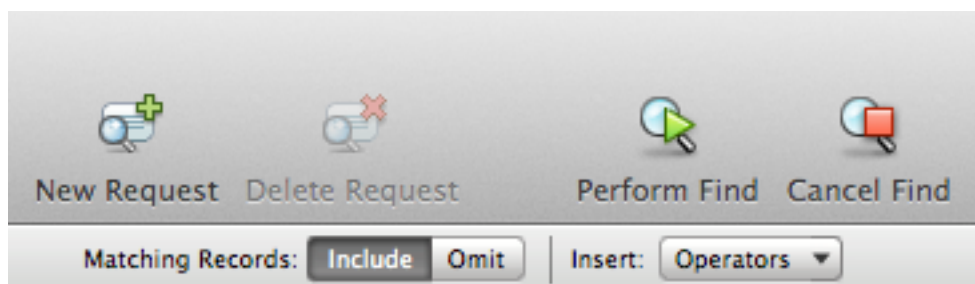
A “Search request” is done by using the search box in the top right corner of the page.



When you do a search request the system looks at all fields within the page. This can still be useful if you know the information you want is only in one field. i.e. when a customer phones up you can type the last six digits of their phone number in to the search box, hit the enter key and provided the customer is already in the database you can answer the phone “Hello Mrs Smith”

If you often want to find something that has a space between the word, the “Find Request” would suite you better rather than a “Search Request”. A “Search Request” will look for the first part of the word and then the last part of the word. i.e. if you do a search request for a post code “CB9 7JJ” a search request will display all records with “CB9” as a result and “7JJ” this often is more confusing and will return more records than you want. That said if you always put postcodes in to the field without a space “CB97JJ” then the search feature will work fine.

Another way to do a find request is to omit records rather than include words. So if you wanted to do a search for everybody with the last name Smith but not include anybody from London then



type Smith into the last name field and highlight the include button. then click “New Request” and type London in to the city field and highlight the Omit button. This will now return all customers with the last name “Smith but will not show the ones who are in London.

You can add as many “Include Requests” and “Omit Requests” as you like with each find request.

The Omit feature does not work with the search function only the Find function

8

Set-up Page

Company Details

Back To Functions Page

Company Details | Chimney Sweeps | Logos | Bank Details | Reminders | Terms And Conditions | Trade Association | Certificate Defaults | System Defaults | Special Offers

Company Name

Sweeps Address
(Keep address to three lines maximum)

Company Phone Number
No spaces between numbers

Company Mobile Phone Number

Company Email Address

Company Website Address

Vat Number

Import Data From Old Version

Enter New Code

The set-up page is the background workings of the database. All the information you input here goes on to things like the sweeping certificates, invoices and letter heads.

1. Company Name. The name of the Sweeping Company. If your personal name is your company name then put your name here as well.
2. Sweeps Address. This is for invoicing remittance. This should be the address you want cheques etc. sent to.
3. Company Phone Number. This should be your main contact phone number as this is displayed on all paperwork.
4. Company email address. The system can send email certificates and invoices and will also send a copy back to the address entered here.
5. Company website Address. This gets listed on all paperwork.
6. VAT Number. ONLY FOR VAT REGISTERED COMPANIES. Enter your VAT Number here for paperwork.
7. VAT Percentage. Set the current rate of VAT via a drop-down box.

9

Chimney Sweeps

Chimney Sweeps Names	Trade association Membership numbers NACS, GOMCS, APICS, ICS	2nd Trade association Membership numbers HETAS, OFTEC, NAPIT	Signature
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

12/12/17
100000113 10/06/18

Sweeps Signature
(This will need to be added from an iDevice)
or added as a picture from a scanner or file

Import Data From Old Version

Enter New Code

The new version can support multiple employees.

On this page you can enter up to 10 chimney sweeps names. When you take a booking you can set which chimney sweep will undertake the work.

Each name can have two membership numbers allocated to it and a signature which will need to be added on an iDevice

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Set-up page

Logos

The screenshot shows a web-based interface for setting up logos. At the top, there is a dark blue navigation bar with a button labeled "Back To Functions Page". Below this is a horizontal menu with several tabs: "Company Details", "Chimney Sweeps", "Logos" (which is currently selected), "Bank Details", "Reminders", "Terms And Conditions", "Trade Association", "Certificate Defaults", "System Defaults", and "Special Offers". The main area of the page is light beige and contains three input fields stacked vertically. The first field is labeled "Company Logo", the second is labeled "2nd Logo (If Required)", and the third is labeled "Company Slogan". To the right of these input fields, there are two buttons: a grey button labeled "Import Data From Old Version" and a blue button labeled "Enter New Code".

1. Company Logo. This should be your main logo. If you don't have a logo then you could enter a trade association logo instead. This logo will go on all certificates, invoices, Envelopes and letterheads. Right click on the box and add a picture.
2. Logo 2. This should not be the same as your main logo. This logo only goes on envelopes for advertising purposes. Right click on the box and add a picture.
3. Company slogan. This goes on envelopes and certificates.

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Set-up Page. Bank Details

Back To Functions Page

Company Details Chimney Sweeps Logos **Bank Details** Reminders Terms And Conditions Trade Association Certificate Defaults System Defaults Special Offers

Bank Details

THESE DETAILS ARE PRINTED ON A INVOICE FOR BACS PAYMENTS
(IF YOU DONT WANT TO ACCEPT BACS PAYMENTS PLEASE CLICK THE BUTTON BELOW)

Click here

Cheques Payable to

Vat Percentage % (If Applicable)

Currency £

Import Data From Old Version

Enter New Code

1. BACS Details. Enter your Bank details here if you accept BACS payments.

Bank Name
Account Name
Account Number
Sort Code

If you don't want to accept BACS payments,
you will need to click the button "Click here"
this will add text into the box stating that BACS payments cannot be accepted

BACS Details
Bank Name
Acc Name
Acc Number
Sort Code
Please put your postcode as the reference

The invoice asks customers to put their postcode as the reference to make it easier for you to track payments as they come in.

2. Cheques payable to. Enter the company name you want cheques written out to.

12

Set-up Page

Reminders



There are two ways to send reminders to customers
A printed reminder card and an Email reminder

1. Reminder picture. Right click and insert a picture to go on the front of the reminder card. This will get printed on an A4 page with two A5 pictures.
2. Reminder Wording. This will be any wording to go with the picture. i.e.

“Your chimney is due for sweeping,
Please call the office on 01234 567 890
to book your next appointment”

3. Reminder wording for email reminders.

13

Terms and Conditions

Back To Functions Page

Company Details Chimney Sweeps Logos Bank Details Reminders **Terms And Conditions** Trade Association Certificate Defaults System Defaults Special Offers

Terms and Conditions for invoicing

ANY COMPLAINT REGARDING OUR GOODS, SERVICES OR TERMS MUST BE CONFIRMED IN WRITING WITHIN 10 DAYS OF RECEIPT OF THIS INVOICE

ANY DISCOUNTS IF GIVEN ARE CONDITIONAL ON THE INVOICE BEING PAID IN FULL WITHIN 30 DAYS OF THE INVOICE DATE SHOWN

ALL ACCOUNTS MUST BE SETTLED IN FULL WITHIN 30 DAYS OF INVOICE DATE SHOWN. IF WE(OR A DEBT COLLECTION AGENCY) HAVE TO TAKE STEPS TO RECOVER OVERDUE AMOUNTS THE CUSTOMER WILL HAVE TO PAY IN FULL ALL EXPENSES, COSTS AND FEES INCURRED IN THE PROCESS OF RECOVERY OR LITIGATION PLEASE NOTE THAT THESE TERMS AND CONDITIONS DO NOT REFLECT UPON THE INTEGRITY OF OUR CUSTOMERS BUT ARE A LEGAL REQUIREMENT.

E&OE

Terms and Conditions for Signature screen

DATA PROTECTION

Please note that we will never give ANY customer information out to third parties and any email addresses given are for the sole purpose of giving the customer their certificates, invoices and sweeping reminders only.

I understand that by signing this certificate I have had the chimney / appliance swept and I have been informed of any problems arising from the sweeping process. I also agree to be contacted in the future when the chimney will become due for re-sweeping.

Import Data From Old Version

Enter New Code

This box is for entering in your terms and conditions for invoicing. The text in this box is printed quite small on the invoice. The database comes with generic terms and conditions pre-written but if you change the text check the invoice to make sure it prints correctly.

Terms and conditions for signature screen
You can enter specific terms here for the signature screen that customers will sign

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Set-up Page

Trade association details

This page is where you set your trade association details.

1. Certificate Orientation. Choose either portrait or landscape for your certificates.
2. Trade association name. Type the full name of your trade association.
3. Trade association email address. (If you enter your trade association email address here, the system will send a copy of your sweeping certificates to it)
4. Trade association address and credits. Just copy the text from the certificate of your trade association.
5. Trade association certificate back. If there are terms and conditions on the back of your trade associations certificates, then scan the certificate back and then right click the box and pick the scan of the certificate.
6. Trade association logo. Right click this box and insert a picture of your trade association.
7. Trade association logo2. This box is for things like HETAS or a second trade association. As with all logo boxes, Right click this box and insert a picture of your trade association.
8. Extra Logo (If you have more than 2 you wish to use)
9. Qualification logo (If required)

Because the logos get printed on certificates and invoices, and can be emailed, keep all files sizes as small as possible to save bandwidth when emailing.

15

Certificate defaults

On this page you choose the default values for the certificate page

On the left you can add four email address suffixes

The right hand side is for choosing the default values for the sweeping certificate.

If you mainly power sweep chimneys the click the drop-down box by “Method swept” and then choose power swept from the list.

16

System Defaults

1. Automatic Email reminders. If you want the system to automatically send email reminders for you set this box to “Yes”. The system gets the current date when filling in the sweeping certificates and adds 12 months, 9 months 6 months or 3 months depending on what you set on the sweeping certificate then generates a reminder date. When the current date is the same as the reminder date the system will automatically send an email.

2. You can set whether reminder emails get sent from a computer or your iDevice

Choose DUPLEX mode only if your printer does DUPLEX Printing

18

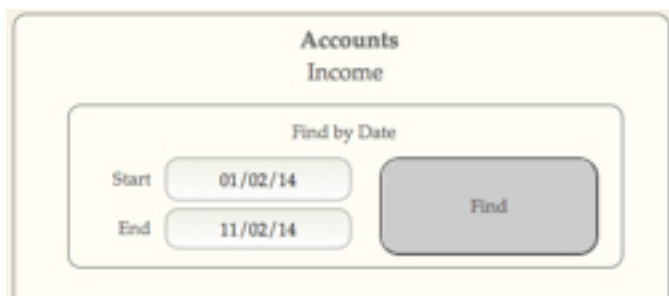
Functions page

1. Certificate View Displays the sweeping certificate of the current record.
2. Print Certificate. This function will print the current certificate. You will be asked if you want to also print an envelope for the record as well.
3. Print Chimney Report. This function will print the current chimney report. You will be asked if you want to also print an envelope for the record as well.
4. Letter Head. This function will take you to a pre made letter format. You will also be asked if you want to print an envelope.
5. Review Days Work. Displays a summery of the days work i.e. amount of chimneys done and revenue earned.
6. Print Invoice. This function will print the current invoice for either the owner or the landlord. You will be asked if you want to also print an envelope for the record as well.
7. Print Envelope. This will just print an envelope. You will be asked to confirm if you want to print the owner or landlord address.
8. Print Job sheet. If you don't use a mobile iDevice and want to take a printed record of the days work with you.
9. Print Reminder card Picture. This will print 100 copies of any reminder picture in the set-up page.
10. Find Due Reminders. This is for printing reminder cards only. Click the Find Due Reminders button and then enter the month and year in the next page this will print all reminders due for the date entered.
11. Find Due Email Reminders. This is for emailing reminders only. Go to the functions page and click "Find Due email Reminders" this will bring up a screen where you can choose a date to search for. Once the date has been picked hit enter and the system will open two email windows, one for private customers and one for landlords. All email address are set in the "BCC" line so email address are kept private.
12. Set-up Page. Takes you to the setup page.

13. Import Data from old version. This is for when we make updates to the system and send out new copies.
14. Outstanding Amounts. This should be done monthly. This searches for all accounts overdue. You will be asked to either print or view. If you choose "Print" the system will only print accounts, which are overdue by more than 30 days. If you choose "View" the system will show you all accounts that are unpaid.
15. Sync Page is where you transfer data to and from the computer and iDevice

19

Accounts Income



You can search and view for all income using the accounts income search feature in the functions page.

The screenshot shows a table with the following columns: Date, Paid By, Cheque No., Amount, and Vat. The table contains many rows of transaction data. At the bottom, there are summary rows for 'Total Cheques', 'Total Income', and 'Vat'.

Click the start date and end dates and a drop-down calendar will appear. Click the dates you want to search for into the boxes and click the find button. (You can search for a single day or every transaction ever recorded)

A scrollable page will appear with dates, payment types and totals of income earned (VAT Figures will also appear if you are vat registered. This page can then be printed to give to an accountant.

21

Diary Page

Order	Qty	AM/PM	Date	Time	Sweeps Name	Post Code	Phone Number	Mobile Number	Last Done
<input type="checkbox"/>	1	1	AM	25.04.16	Call 30 Min Before	MR LEWIS	68 RAYNSFORD ROAD GT WHELNETHAM	IP30 0TN	01284 388745
<input type="checkbox"/>	2	1	AM	25.04.16	Before School Run	MRS SMITH	104 THE STREET SOMEWHERE	CB11 2TT	01638 259875
<input type="checkbox"/>	3	1	AM	25.04.16	After 3.30	MR JONES	HOBBITT COTTAGE HOBBITT LANE	HRS 7TH	01544 159753
<input type="checkbox"/>	4	1	AM	25.04.16		MR POTTER	41 LARK RYSE UPMINSTER	ND67 8GH	01863 368749
<input type="checkbox"/>	5	5	PM	25.04.16	Call 30 Min Before	DR HAMPSHIRE	HAMPSHIRE HALL HAMPSHIRE LANE	HA3 3JR	01234 567890

The Diary page is a quick view of all jobs booked for a specific day.

Click the forward and back buttons to pick days.

Add New Record. If you want to add a new record you will be taken back to the main database to enter the information then just click the diary button to come back to the diary page for viewing

Hold in View. Any record with this check box active will remain in view regardless of the day viewed. This makes it easy to see where you want to book the customer. Once you find the right date to book in the customer click the date field and enter that date.

Earlier if possible. Click this radio box if someone has booked in but wants to be done earlier if a cancellation occurs. You can do a quick find of any customers who want to be done earlier by going to the diary page and clicking the “Find” button above the Earlier if possible at the top left of the screen.

The diary page is a good way to sort the route order you will take for that day. Click the order drop-down box next to a customers record and pick the relevant order. The page will automatically re-sort the customers.

For multiple chimney sweeps choose the relevant chimney sweep for the specific record by clicking the box “Sweeps Name” a drop down list of all chimney sweep will appear which are in the setup pages

							Choose chimney sweep
							CLEAR
<input type="checkbox"/>	<input type="checkbox"/>	1	1	AM	25.04.16	Call 30 Min Before	MARTIN LEWIS
<input type="checkbox"/>	<input type="checkbox"/>	2	1	AM	25.04.16	Before School Run	
<input type="checkbox"/>	<input type="checkbox"/>	3	1	AM	25.04.16	After 3.30	MARTIN LEWIS
<input type="checkbox"/>	<input type="checkbox"/>	4	1	AM	25.04.16		
<input type="checkbox"/>	<input type="checkbox"/>	5	5	PM	25.04.16	Call 30 Min Before	MARTIN LEWIS

Filter the records down by clicking the “Choose Chimney Sweep” box and choosing from the list of sweeps names

Choose chimney sweep

CLEAR

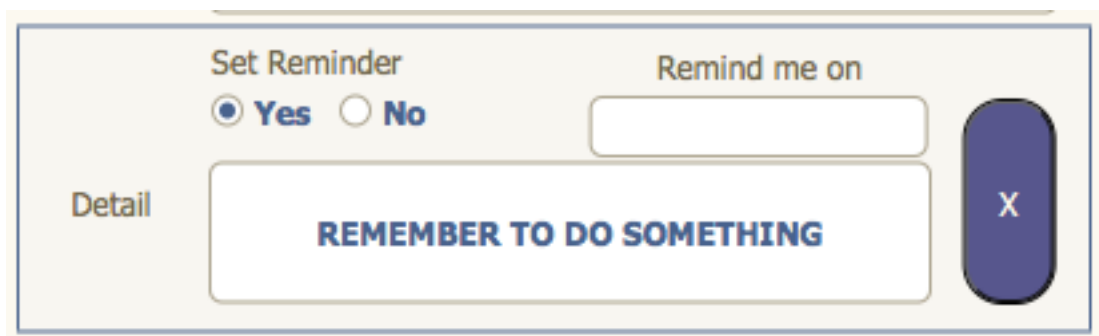
MARTIN LEWIS

The diary will then show only the records to be done by that chimney sweep

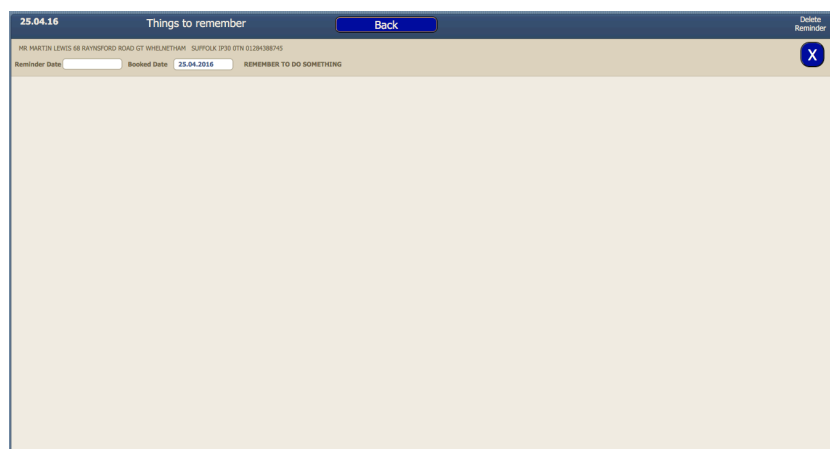
							Choose chimney sweep
							CLEAR
<input type="checkbox"/>	<input type="checkbox"/>	1	1	AM	25.04.16	Call 30 Min Before	MARTIN LEWIS
<input type="checkbox"/>	<input type="checkbox"/>	3	1	AM	25.04.16	After 3.30	MARTIN LEWIS
<input type="checkbox"/>	<input type="checkbox"/>	5	5	PM	25.04.16	Call 30 Min Before	MARTIN LEWIS

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Reminder Page



The reminder page is where you can view anything you have set to be reminded about. This screen will automatically be displayed if you have set a specific date to be reminded on. If you have set a reminder but no date then you have to press the “Active Reminders” button on the main page to view this page.



The reminders can be set on either of the main pages i.e. Computer main page or the iDevice main page.

To clear completed reminders click the X to the side

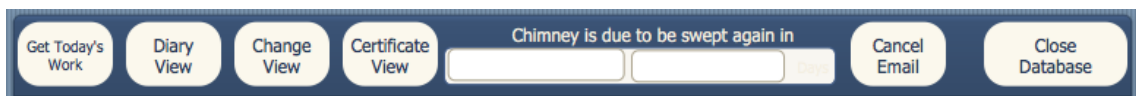
23

Using the database on an iDevice

Because an iDevice is touch screen the main database screen has been designed differently to get the best functionality from it. Because fields are picked with the touch of a finger or stylus the normal view meant the fields were too small to click accurately. So we made the main screen portrait, which is scrollable.

The iDevice main screen contains everything the normal one does plus a few extra functions i.e. if you using the database on an iPhone and you want to call the customer there is a “Dial” button next to the phone number. We will go through all the extra features later.

Lets start with the buttons at the top.



Get Today’s Work. Provided all the customers have been entered into the system, when you click this button it will automatically display all the records for that day and sort them into the order you specified in the diary page.

Diary View. This will take you to the diary page to make adjustments if required.

Change View. This will let you look at the landscape view of the main screen.

Certificate View. This takes you to the certificate information page where all the information is inputted for the appliance/chimney.

Close Database. When you have finished your work for the day the database has to be closed down before syncing to iTunes takes place. Or an error message will be displayed saying that the system was not closed down properly. (I have not found any problem as yet if this does happen but best to avoid it)

Cancel Email. The automatic email reminder function can be cancelled for one customer by clicking this button. (Only if there is a date already in the field “Next email reminder will be sent on”)

24

Certificate View

Certificates have three views. The first is the general information input screen.

You can then choose from a Generic or Industry Standard depending which trade association your with and your preference of certificate.

The Generic certificates allow you to be able to enter up to 10 appliances per record. Any more than 10 and you will need to duplicate the record.

The industry standard only allows one chimney per record

There is a “Default All” button for the most common values on each appliance apart from the “appliance” on the first record and “appliance” and “location” on all others.

The default button sets the fields to what you choose in the All fields can be changed even after the default button has been pressed, so the cowl field can be changed to pass, fail or not applicable or the ventilation field to pass, fail or not checked etc.

For any problems that arise there are five quick pick drop-downs for the most common faults you find. The first box chooses a number to represent the appliance you are referring to. And the long box is the detail of the fault.

If you want to enter some information that is too long to be put in to the quick pick boxes there is a free text box underneath for you to type as much or as little information as you like.

The Title and Last name boxes are available if you need to change it from Mrs Smith who booked the call to Mr Smith who will be signing the certificate.

25

Landlord safety record.

There is now a new Landlord safety record.

For people who have contact work such as National Trust or local councils, The Landlord safety record is an alternative to a sweeping certificate.

The form allows up to 4 appliances to be entered. The record can then be emailed to the customer or agent or printed and posted if required.

There is a DEFAULT tab in the view to set your own most commonly used values

To set the default values select the appliance then click the default button under the appliance heading.

26

Warning Notice

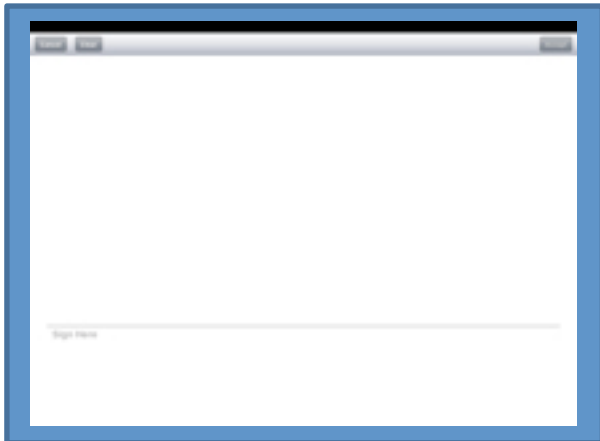
A new Warning notice has been created to give to a customer when you don't want to issue a sweeping certificate

Same as a sweeping certificate, fill out all fields and then email the form or print and post to customer.

Only one warning notice can currently be set per record and will use appliance 1

Get Signature. Click here to be taken to the signature screen. Once the customer has read the terms you set out. Tap below the line and choose “Get

Signature” then the customer can sign their name. In the top right corner click accept or in the left top corner cancel or clear. It is important that when the customer is signing the screen they ONLY touch with one finger/stylus. iDevices may be multi touch but if the customer’s thumb is holding the screen then the signature will not draw.



Customer Not Present. Click here if there is nobody to sign the certificate and it will enter this in to the signature box.

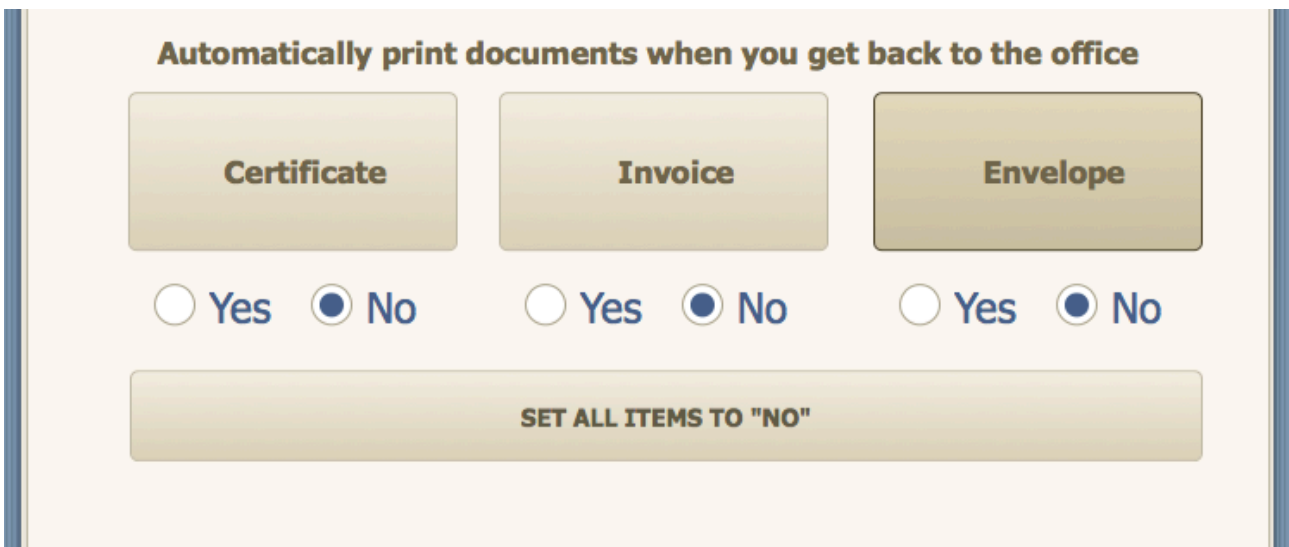
Paper Certificate Issued. If the customer does not have an email address or can't sign the screen and you want to write a paper certificate instead then click here and this will be entered in to the signature box.

X This deletes the Customer not present or Paper certificate issued text from the signature box.

The email address box is where you can enter the customers email address and if required the landlords email address. For the most common email syntax's we have put buttons to save on typing. So you will only need to enter the text before the "@". there are four email boxes that you can customise in the setup page.

To clear the "no email address" click the **X** to the right.

If you want to print a certificate or invoice or landlord invoice when you return to the office set the check boxes as required. When the database opens up on a computer the marked items will automatically print.



Once all information is complete hit the Email Certificate button and the email will be sent to the customer and if required the landlord as well.(This will only be done instantly if you have a 3G or 4G connection. Otherwise this will be done when a Wi-Fi connection is made) Once this is done you will be taken back to the iDevice main screen to complete the job.

Now the emails and signatures have been done, complete the main screen by entering the price charged. You will not be allowed to continue until you have set how the customer paid.

When all the information has been entered click the “Job Complete go to next record” button.

This is important as the button does several things when pressed. As follows

- ✓The system will check that you have entered a next due amount. i.e. 12 Months, 9 Months etc. etc.
- ✓It will also check that you have entered how the customer has paid.
- ✓It Deletes the date from “Date Booked” and puts it into last swept field. And also deletes the time field.
- ✓If the First swept field is empty then it will add the date to this also.
- ✓It will also look to see the next due date and enters the reminder date in to the reminder field. You will then be taken to the next customer in the order you have set.

The “Out” “Fire Alight” and “Cancelled” Buttons put that text with the days date into previous sweeping info field. And deletes the date from the date booked field.

If required you can set the next sweeping date, whether its a Am or Pm call and a specific time
When you click “Job complete go to next record” the system will automatically add the booking in to the diary

The screenshot shows a mobile application interface with a light beige background. At the top, there are three dark blue buttons labeled "Out", "Fire Alight", and "Cancelled". Below these is a "Reminders" section with a "Detail" label. It contains a "Set Reminder" section with "Yes" (selected) and "No" radio buttons, and a "Remind me on" text input field. To the right of the "Remind me on" field is a dark blue button with a white "X". Below the "Reminders" section is a text prompt: "If the customer wants to book the next appointment, enter the date here and it will automatically add when you complete the job (Automatically sets a reminder)". At the bottom, there are three text input fields labeled "Date", "Am / Pm", and "Time".

27

Chimney Reports

The chimney report page is for documenting any serious problems you find within the property

All fields are on a drop-down box to save typing and once complete the chimney report can be printed or emailed to the responsible person or agent.

JOE BLOGGS CHIMNEY SWEEP

123 ANYWHERE STREET
HERESVILLE

01234 567890

joebloggs@here.co.uk www.joebloggs.co.uk
123456789

MR MARTIN LEWIS
88 RAYNSFORD ROAD
GT WHELNETHAM
SUFFOLK IP30 0TN

Date 14.04.2013

Chimney Report

Date of report :- **14.04.2013**
Date Last Swept if known :-
Recommended sweeping frequency :-
Responsibility for work :-
Fire type :-
Is the chimney liner :-
Liner type :-
Fuel Type :-
Reason for visit :-
Work done :-
Deposits removed :-
Level of build up :-
Reason for build up :-
Condition of fuel :-
Visual condition of internal flue :-
Visual condition of stack :-
Visual condition of pot :-
Visual condition of terminal :-
Has a chimney fire occurred :-
Most likely reason for chimney fire :-
Fire risk after sweeping :-
Smoke alarm :-
Carbon monoxide alarm :-
Ventilation provisions :-

Comments :-
Recommendations :-

28

Invoices

This the what the invoices look like. your details are displayed on the top left and any logos you have entered into the system go on the top right.

Both the customer and landlord address go on the next section including any reference numbers and order numbers associated with the job.

If you are vat registered and have included this information in the setup page then VAT is worked out for you.

Make sure you enter you payment details in the setup page so customers know how to pay you.

If you want to add an administration charge to a invoice, add “Administration Charge” to one of the empty appliance fields and the cost in the price field.

Your terms and conditions are printed at the bottom of the page. If you add a lot of terms and conditions in the setup page, you will need to check the invoice page to make sure it will print correctly.

JOE BLOGGS CHIMNEY SWEEP 123 ANYWHERE STREET HERESVILLE Q1234 567890 joebloggs@here.co.uk www.joebloggs.co.uk 123456789		INVOICE	
Property Address MRS DAWN SMITH 104 THE STREET SOMEWHERE CAMBS CB11 2TT		Landlord / Agent Address REF- 104 THE STREET	
Date	13.04.13	Payment Due	13.05.13
		Order no.	
AGA	DESCRIPTION	AMOUNT	
		£50.00	
BACS Details Please put your postcode as the reference		Nett VAT Total Due	£50.00 £10.00 £60.00
CHEQUES PAYABLE TO			
Terms and Conditions			
<small> ANY COMPLAINT REGARDING OUR GOODS, SERVICES OR TERMS MUST BE CONSIDERED AS WAIVED WITHIN 14 DAYS OF RECEIPT OF THIS INVOICE NEW DELIVERIES OF CHIMNEYS AND SMOKESTAKES ON THE INVOICE BEING MADE PAYABLE WITHIN 14 DAYS OF THE INVOICE DATE UNLESS ALL ACCOUNTS MUST BE SETTLED IN FULL WITHIN 14 DAYS OF INVOICE DATE UNLESS A BILLS OF EXCHANGE COLLECTION AGREEMENT TO THIS EFFECT RECEIVERS SHOULD ALWAYS THE CUSTOMER WILL HAVE TO PAY IN FULL ALL EXPENSES, COSTS AND FEES INCURRED IN THE PROCESS OF RECOVERY UNLESS OTHERWISE STATED CONDITIONS WHICH APPLY TO THE SERVICE OF OUR CUSTOMERS BUT NOT A LOCAL REQUIREMENT. ETC. </small>			

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Letterheads

There is a generic form for sending out business letters and being able to keep track of them within the database.

This has been created for people who don't have things like MS WORD or MAC's PAGES.

Once you have filled in the setup pages , all your logos will be automatically added to the letterhead. And if you are using an iDevice you can capture your own signature for all documentation.

Once your letter is ready , you can either print it out or if you are on an iDevice then you can email the letter if required.

JOE BLOGGS CHIMNEY SWEEP	
123 ANYWHERE STREET HERESVILLE	
01234 567890 <small>joebloggs@heres.co.uk www.joebloggs.co.uk 12345678</small>	
MR MARTIN LEWIS 66 RAYNSFORD ROAD QT WHELMETHAM SUFFOLK IP30 0TN	Date 13.04.13
	BURY ST EDWARDS REF - 66 RAYNSFORD ROAD
Joe Bloggs	
JOE BLOGGS CHIMNEY SWEEP	

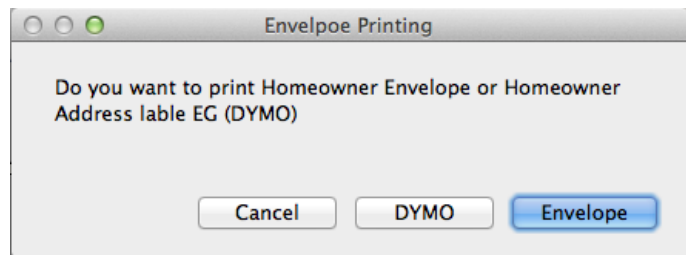
30

Envelopes

When you print any certificate, report, invoice or letter you will be asked if you want to print the envelope for the record or records being printed. If the item being printed could be for either the customer or landlord then you will also need to confirm which one you want to print.

If you have put logos into the setup page then your logos will also be printed on the envelope for advertising purposes.

If you use other software to generate your paperwork but still want the system to print envelopes then go to the function page and click the print envelope button. This will print one envelope for the currently viewed record only.



When the system asks you if you want to print an envelope it will give you the option to print an envelope from your normal printer or a label from a printer like “DYMO”

31

Updating the Database V20 and above

Periodically we will make changes to the database and upload them to the website for download. Follow these steps to ensure you have the very latest version to ensure smooth running of the system.

1. **IMPORTANT** Always back up your copy of the database to a safe location before updating. This can be done by simply copying the file “Digital Sweeps.fmpur” and pasting it to a secure location. Then close the database down.

2. Go to <http://www.digitalsweeps.co.uk/download.html> and download the latest version of the relevant database. Then unzip the file to your desktop.

3. Right click of the existing Digital Sweeps folder and Change the name of the current Digital Sweeps **folder** not the files within to “Digital Sweeps old” and move the whole folder to your desktop

4. Follow these steps for version 20 and above. On your existing database goto extra functions / Setup pages then click Export Data.

5. Open the new database and wait for the system to take you to the set-up pages.

6. On the right hand side of the screen you will find two IMPORT buttons.

7. Click Import data V20 and above

8. Navigate to the “Digital Sweeps old” folder you saved to the desktop in step 3.



Update from V19 or earlier

Because of update issues with versions 19 and earlier, Setup information might need to be reentered manually. Please call Digital Sweeps on 01359232955 for help in updating from earlier versions.

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Installers Section

Back To Functions Page

Sweeping Installing

Company Details T's & C's Logos Finance Details Competant Person Scheme Quotation Form Text Setup Prices

Copy details from Sweeping set-up page

Company Name Suffolk Chimney Liners

Company Email Address suffolkchimnevliners@icloud.com

Sweeps Address BEGGERS ROOST, MILL ROAD WEST, PAKENHAM, SUFFOLK, IP31 2NE
(Keep address to three lines maximum)

Company Website Address www.suffolkchimnevliners.co.uk

Company Phone Number 01359232955
No spaces between numbers

Company Mobile Phone Number 07810313235

Set up your installers details independently or copy the information from the Chimney sweeps side

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Installer section setup page

There is an additional setup section for the installers side.
If you have the same details for chimney sweeping and stove installing then just click the “Copy details from Sweeping setup page”

If not input the additional details manually

The screenshot shows a web interface for setting up a 'Competent Person Scheme'. At the top, there are tabs for 'Sweeping' and 'Installing'. Below these are sub-tabs: 'Company Details', 'T's & C's', 'Logos', 'Finance Details', 'Competent Person Scheme', 'Quotation Form Text', and 'Setup Prices'. The 'Competent Person Scheme' tab is active. It contains a text input field for 'Competent person scheme' with the value 'HETAS', and another for 'Company Reg Number' with the value '6025'. Below these is a section for 'Trade Association Logo 2 (HETAS ETC)' which includes a logo for HETAS (Home Energy Technology Association) and a circular logo with a red and white design.

Enter any details for a competent person scheme.

Setup prices

There are two ways of doing Estimates / Quotes

Either as a complete kit or as individual components

If you do prices for complete kits then you need to itemise what is in a kit in the “List the items that make up a kit” this is for a job sheet that may get sent to a partner or employee

The screenshot shows the 'Setup Prices' page in the installer section. It has the same navigation structure as the previous page. The 'Setup Prices' tab is active. It features three sub-tabs: 'Flexible liner', 'Twinwall liner', and 'Components'. The 'Flexible liner' sub-tab is selected. It contains a text input field for '5" liner kits', another for '6" liner kits', another for '7" liner kits', another for '8" liner kits', and another for 'Other size kits'. To the right, there is a section titled 'List the items that make up your kits' with a list of items: 'Liner', 'Pot hanger cowl', 'screw fit MA adaptor', '1000mm vit flue', 'Small register plate', 'CO Alarm', 'Chimney Sweeping', 'Labour', 'Registration', and 'Insulation for relevant kits'. Below this list are two text input fields: 'Individual item prices' and 'Other items'.

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Installers Main Page

The screenshot shows the 'Installers Main Page' with a dark blue header containing a 'BACK' button and four status indicators: 'Quote Total', 'Deposit Required', 'Due on completion', and 'VAT'. Below the header is a navigation bar with tabs for 'Home', 'Reports', 'Flexible Liner', 'Twinwall', 'Individual items', 'Components', and 'Stoves'. The main content area displays the address 'MR LEWIS BEGGARS ROOST MILL ROAD WEST SUFFOLK IP31 2NE 01359232955' and 'Last Est. No'. There are six buttons: 'Quotation Page', 'Invoice', 'Dataplate', 'Hearth Diagram', 'Hood Diagram', and 'Job Sheet'. A 'Work to be done by' field is present. Below it are 'Jobs Booked' (1), 'Order' (1), and 'Time' (AM) fields. A 'Time Detail' section shows 'Call 30 Min Before'. The 'Date Booked' is 17/02/18, with 'Quote Done' and 'Install complete' buttons. A text area for 'Choose the text to go on the quotation form' is at the bottom left. On the right, there are 14 status indicators with radio buttons: Quote To Do, Quote Done, Quote Sent, Job Accepted, Deposit Paid, Parts Ordered, Stove Ordered, Registration Required, Job Completed, Final Payment Made, and Account Overdue.

The main page gives you information regarding the state of records you have done quotes/estimates for.

The reports section will give you the ability to easily search for records to still do, records done, quotes accepted, completed jobs, payments outstanding and payments overdue.

The password is if you have employees who you don't want access to company information.
the password is set in the setup pages

The screenshot shows the 'Reports' section with a dark blue header containing a 'BACK' button and the same four status indicators as the main page. The navigation bar is the same. Below it is a 'Password' field. There are six report category buttons: 'Quotes To Do', 'Quotes Done', 'Quotes Accepted', 'All Jobs Completed', 'Payment Outstanding', and 'Payment Overdue'. Below these is an 'Income' section with a 'Find by Date' search box containing 'Start' and 'End' fields and a 'Find' button.

The screenshot shows a web interface for selecting a flexible liner kit. At the top, there is a dark blue header with a 'BACK' button and four tabs: 'Quote Total', 'Deposit Required', 'Due on completion', and 'VAT'. Below the header is a navigation bar with tabs for 'Home', 'Reports', 'Flexible Liner', 'Twinwall', 'Individual items', 'Components', and 'Stoves'. The 'Flexible Liner' tab is active. The main content area is divided into two columns. The left column contains five dropdown menus for selecting flue sizes: '5" liner kits', '6" liner kits', '7" liner kits', '8" liner kits', and 'Other size kits'. The right column is titled 'Liner kit list' and contains a list of items included in the kit: 'Liner', 'Pot hanger cowl', 'screw fit MA adaptor', '1000mm vit flue', 'Small register plate', 'CO Alarm', 'Chimney Sweeping', 'Labour', 'Registration', and 'insulation for relevant kits.'

The flexible liner section lets you do a quick quote / estimate via kit form with everything included.

simply choose the appropriate flue size and whether the liner is insulated.

all prices can be set and changed in the set up page

The twin wall tab is for choosing separate items required for installing a twinwall liner.

Due to the amount of different flueing options there are too many choices to do this as a kit.

The screenshot shows a web interface for configuring a twinwall liner. It has the same header and navigation bar as the Flexible Liner interface. The 'Twinwall' tab is active. The main content area is divided into two columns: 'Straights' and 'Components'. The 'Straights' column contains five rows, each with a text input field and a small square checkbox. The 'Components' column contains five rows, each with a text input field and a small square checkbox. Below the 'Straights' section, there is a 'Bends' section with five rows, each with a text input field and a small square checkbox.

Individual items is for flexible liners and components.

Rather than a kit you can choose each component separately

The Components tab

This section lets you choose alarms, labour items and all components required

The Stoves section lets you keep track of all stove prices and a place to put tracking information in to.