Order Engine v 1.33
User Manual

This online document will be regularly updated reflecting changes and additions to the Zipline Order Engine program. It is in PDF format so you can download or print it as required. Always be sure you are working from the current version of the document.

!	Throughout this document you will see these boxes. They are designed to draw your attention to something important or noteworthy.

Context Sensitive help is available on each page of the Zipline Order Engine app.
Click the **ZIPLINE HELP** **Show** link on any page.

You can email support at support@zipline.tools if you get stuck and can't find your answer here.

Table of Contents

What is Zipline Order Engine

Zipline Order Engine is a process automation tool for service companies. If you bill customers for time and materials then Zipline Order Engine will take care of the 'paperwork' for you, from Estimate to Archives.

Zipline Order Engine operates in the Google Cloud so your data is private, safe, and easily accessible. You have no expensive software to download, install, or maintain. You have no backups to worry about, we do that for you.

Zipline Order Engine operates on any system that has a web browser, including tablets and smart phones. It will run from anywhere you have an internet connection.

Who Can Use Zipline Order Engine

Anyone in the service business can use Zipline Order Engine.

Some examples are:

- Computer service
- Appliance repair
- Web developers
- Graphic designers
- Small engine repair
- Window installers
- Roofers
- Renovation specialists

Work Flow

All service providers have the same basic work flow:

Estimate ➡ Active ➡ Complete ➡ Billing ➡ Archive

It doesn't matter if you are servicing refrigerators or computers. Designing websites or graphic arts. The process is the same. You are doing work, tracking your time and materials, and billing your customers.

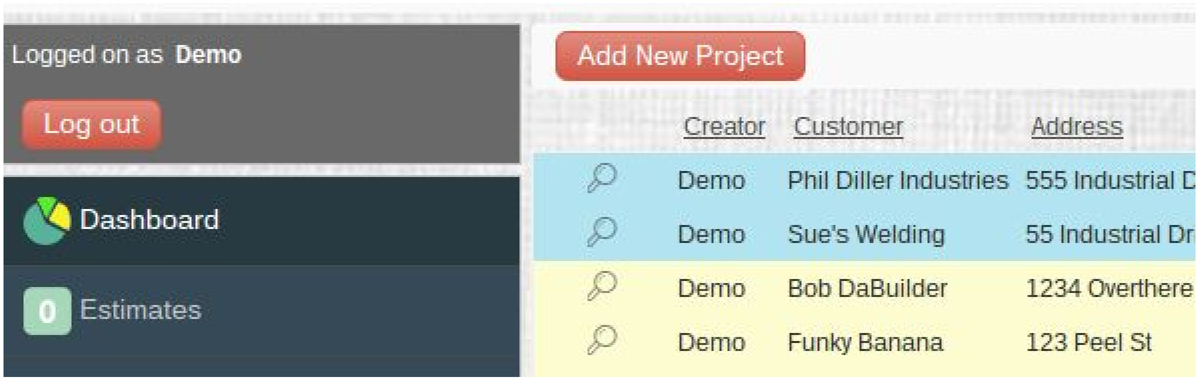
Zipline Order Engine streamlines and automates this process for you.

Back to Table of Contents

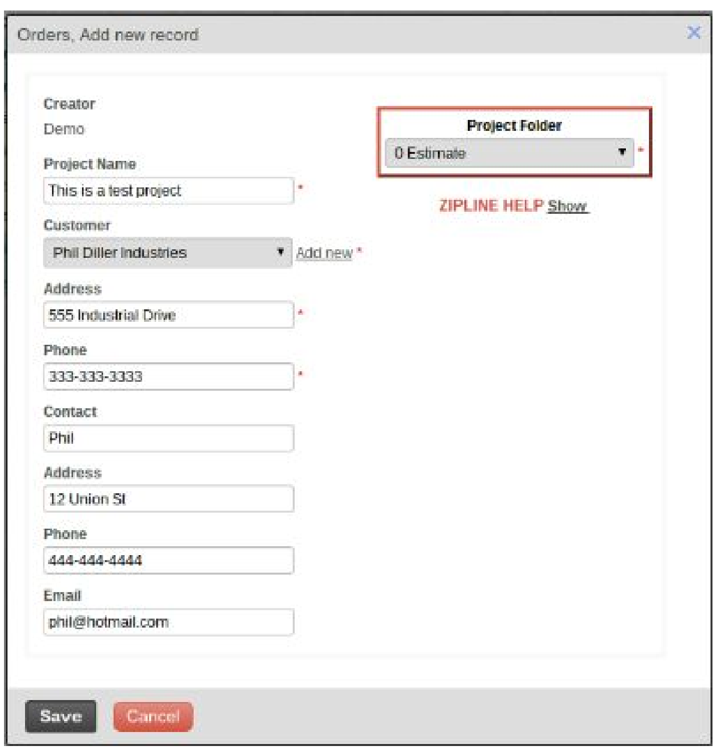
Getting Started

Starting a New Project

New projects are always added from the Dashboard screen. Click on the **Add New Project** button.



A pop up window will appear. At this point you will be adding a 'skeleton' project with just basic information - the project name, customer info, and the type of order you would like to create. You can pick customers from a list or add customers on the fly by clicking Add new beside the Customer name. Estimate or Active. Selecting Active skips the Estimate process altogether and bumps the order into the Active folder.



When you are finished filling out the Add form click **Save**. You will return to the Dashboard list and your new project will appear in the list. If you created it as an Estimate it will be blue. Active projects are yellow.

Back to Table of Contents

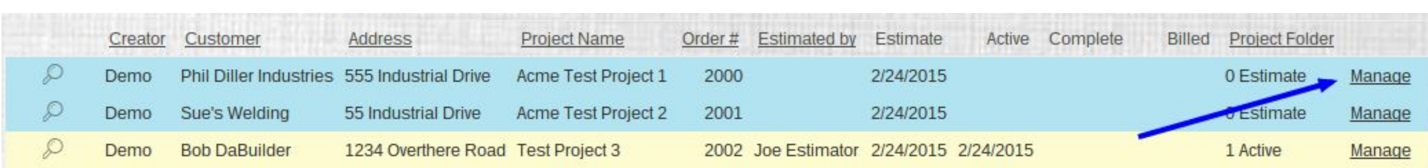
The Dashboard

The Zipline Order Engine dashboard gives you a snapshot view of all the projects currently traveling through your system. The list is colour coded to reflect the status of each project. Estimates are blue, Actives are yellow, Completed are green, and Billed are white.

Dates are automatically entered as a project moves through the system enabling you to easily see how long each project has been in each folder during the trek from Estimate to Billed.

Creator	Customer	Address	Project Name	Order #	Estimated by	Estimate	Active	Complete	Billed	Project Folder	
Demo	Phil Diller Industries	555 Industrial Drive	Acme Test Project 1	2000		2/24/2015				0 Estimate	Manage
Demo	Sue's Welding	55 Industrial Drive	Acme Test Project 2	2001		2/24/2015				0 Estimate	Manage
Demo	Bob DaBuilder	1234 Overthere Road	Test Project 3	2002	Joe Estimator	2/24/2015	2/24/2015			1 Active	Manage
Demo	Funky Banana	123 Peel St	Test Project 7	2007			2/24/2015			1 Active	Manage
Demo	Joe's Seafood	555 Walmart Blvd	Project 1234	2005			2/24/2015			1 Active	Manage
Demo	John's Variety	123 Joe's Place	This is Project #4	2006			2/24/2015			1 Active	Manage
Demo	Charlie's Fries	123 King St	Test Project 5	2004			2/24/2015	2/24/2015		2 Complete	Manage
Demo	Joe's Seafood	555 Walmart Blvd	Project #2526234	2003			2/24/2015	2/24/2015	2/25/2015	3 Billed	Manage

The Dashboard allows you to navigate easily to your project records. For example, if you want to work on any single project on the Dashboard list just click the Manage link at the end of the project row.



Creator	Customer	Address	Project Name	Order #	Estimated by	Estimate	Active	Complete	Billed	Project Folder	
Demo	Phil Diller Industries	555 Industrial Drive	Acme Test Project 1	2000		2/24/2015				0 Estimate	Manage
Demo	Sue's Welding	55 Industrial Drive	Acme Test Project 2	2001		2/24/2015				0 Estimate	Manage
Demo	Bob DaBuilder	1234 Overthere Road	Test Project 3	2002	Joe Estimator	2/24/2015	2/24/2015			1 Active	Manage

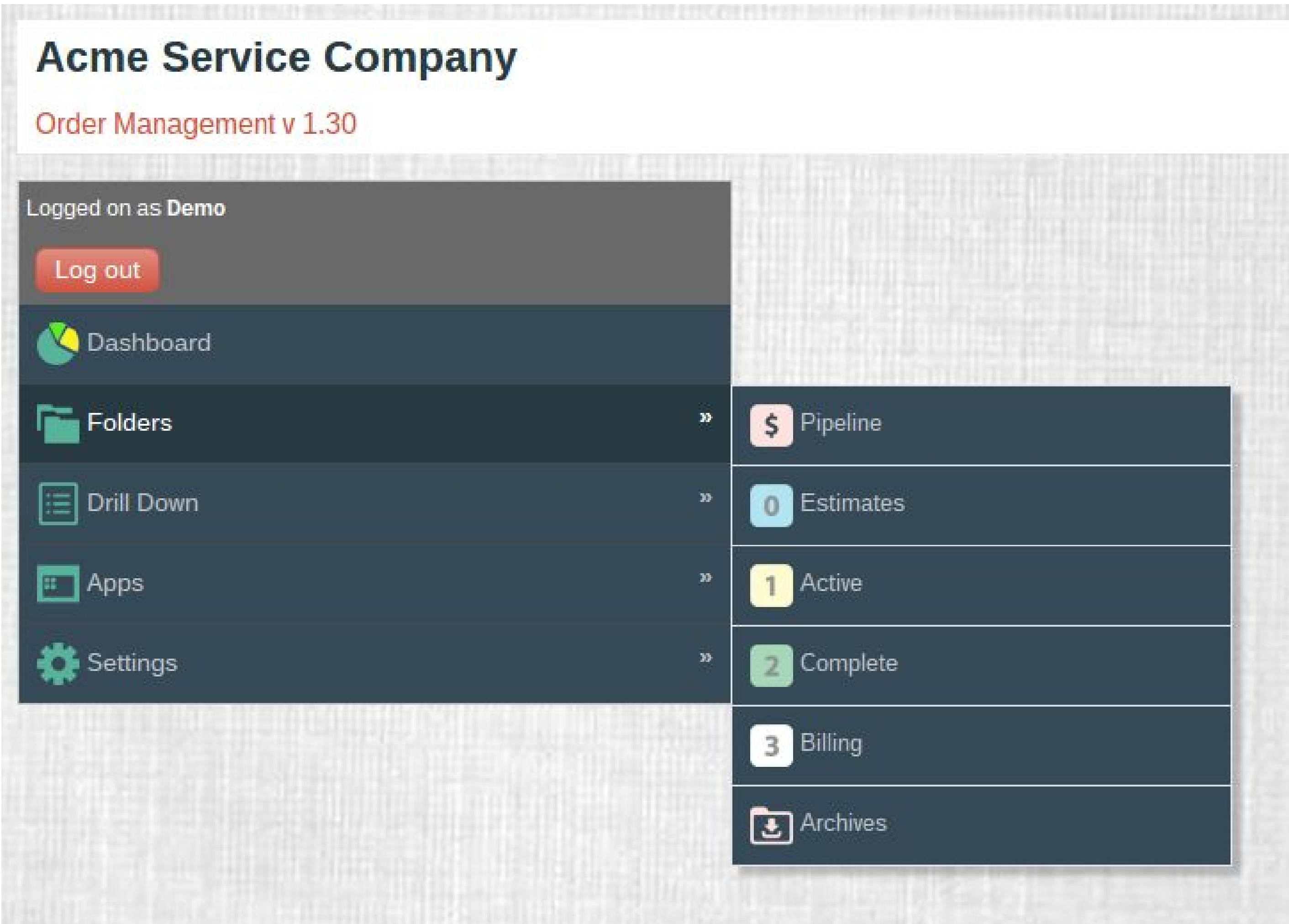
! Clicking Manage will route you to a project's folder and list only that project in the folder.

Back to Table of Contents

Quick Tips

Navigation

To navigate to the various project folders, Estimates, Active, or Billed click the menu bars on the left of the Dashboard. This will take you directly to the folder containing each specific type of project.



Drill Down takes you to some table views where you can view, sort, and filter time and materials records.

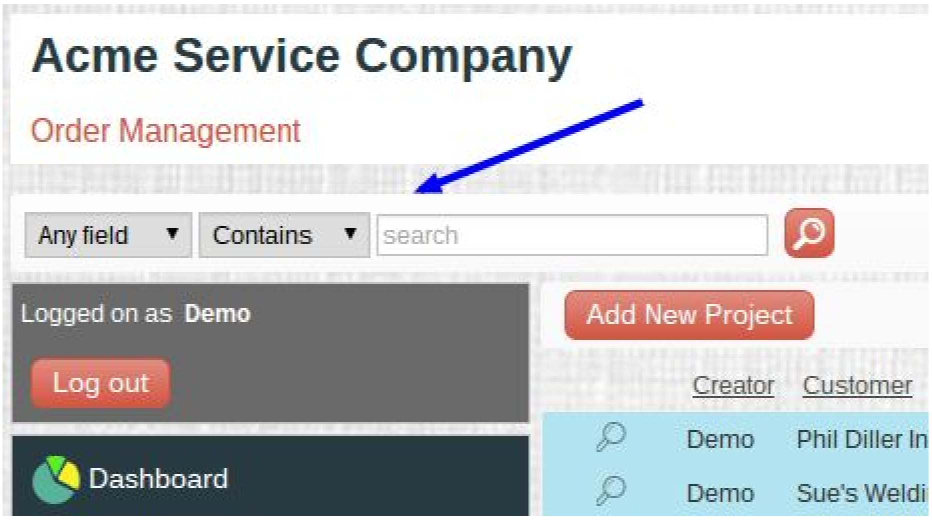
Apps are optional add-on modules which extend the functionality of Zipline Order Engine.

Under Settings you can add / edit company info, customers, inventory items, employees, and other system information files.

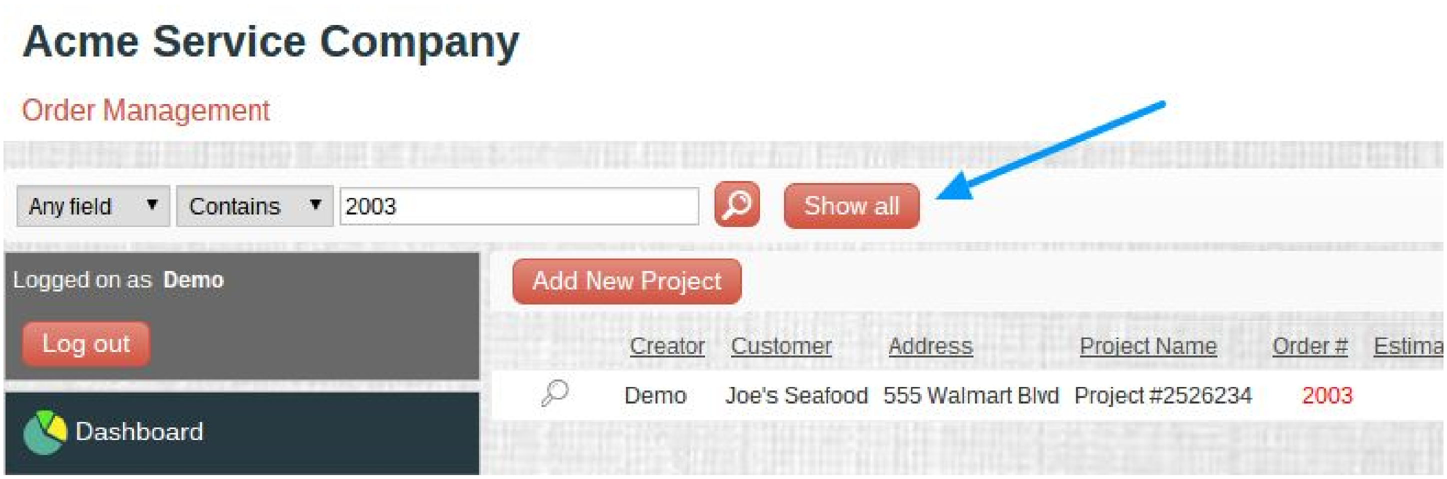
Back to Table of Contents

Searching

You can search through all of the projects in any folder by using the advanced search bar at the top of the List screen. This will filter and display only records which match your search criteria.



!	When you are finished working with the filtered list of records you can reset the filter to default by clicking the Show All button.

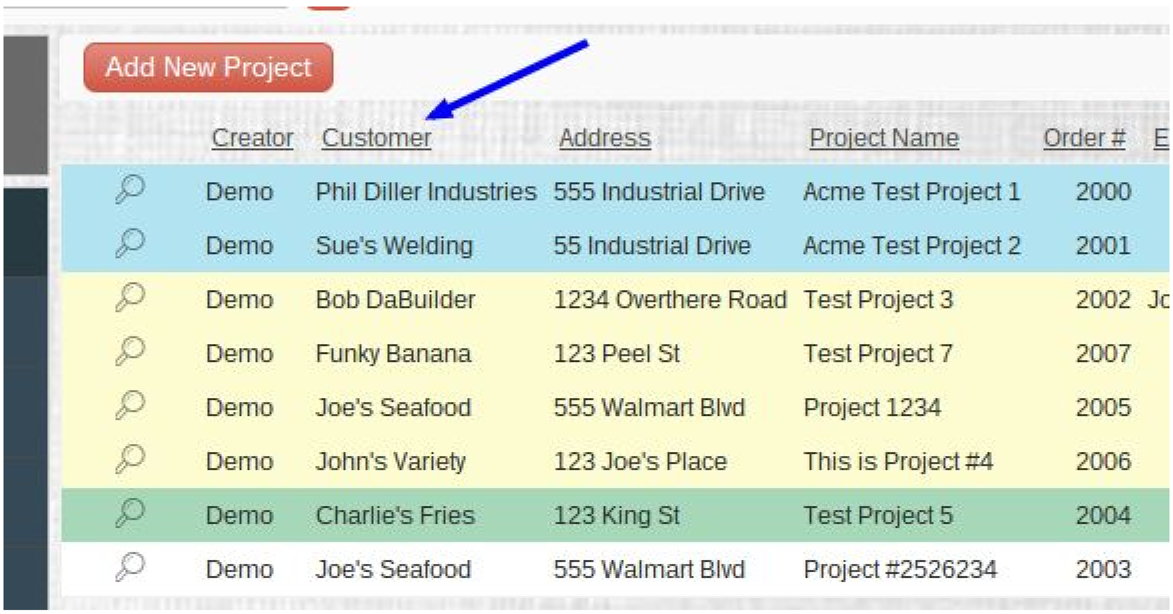


Back to Table of Contents

Sorting

You can re-sort any list by clicking any of the column headings. For example, to sort by Customer click the Customer heading. To return to the default sort order just refresh the page.

!	You can sort on multiple columns at the same by holding down the Ctrl key when clicking the column headings.



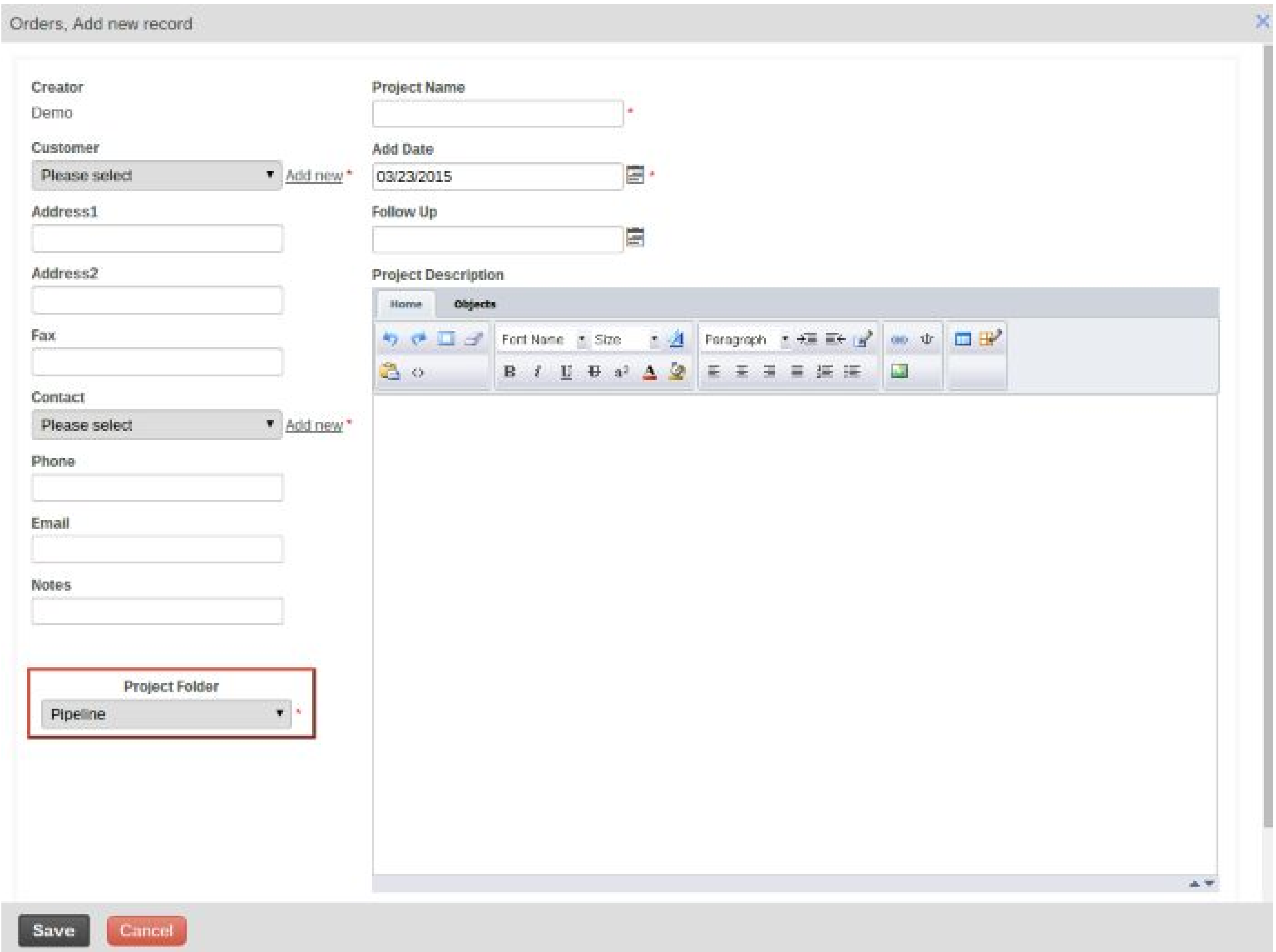
Number of Records per Page

By default your Dashboard lists 200 projects per page. You can list more or less using the records per page control at the top right hand corner of the Dashboard.

[Back to Table of Contents](#)

Pipeline (optional module)

The Pipeline, or funnel as it is sometimes called, will help you to keep track of new contacts, prospects, and potential work. How much work do you have in the pipeline right now? The sort of random stuff that you know is out there and could turn into good paying projects but you have no real method for staying on top of it.



The Pipeline module will track all this random information for you and allow you to set follow-up dates on it so you don't forget to take actions that could win you this customer or project. Pipeline projects will turn pink on the list page when a follow-up item is due.

Pipeline projects can easily be transformed into a 'real' project with one click to convert them to an Estimate or Active project.

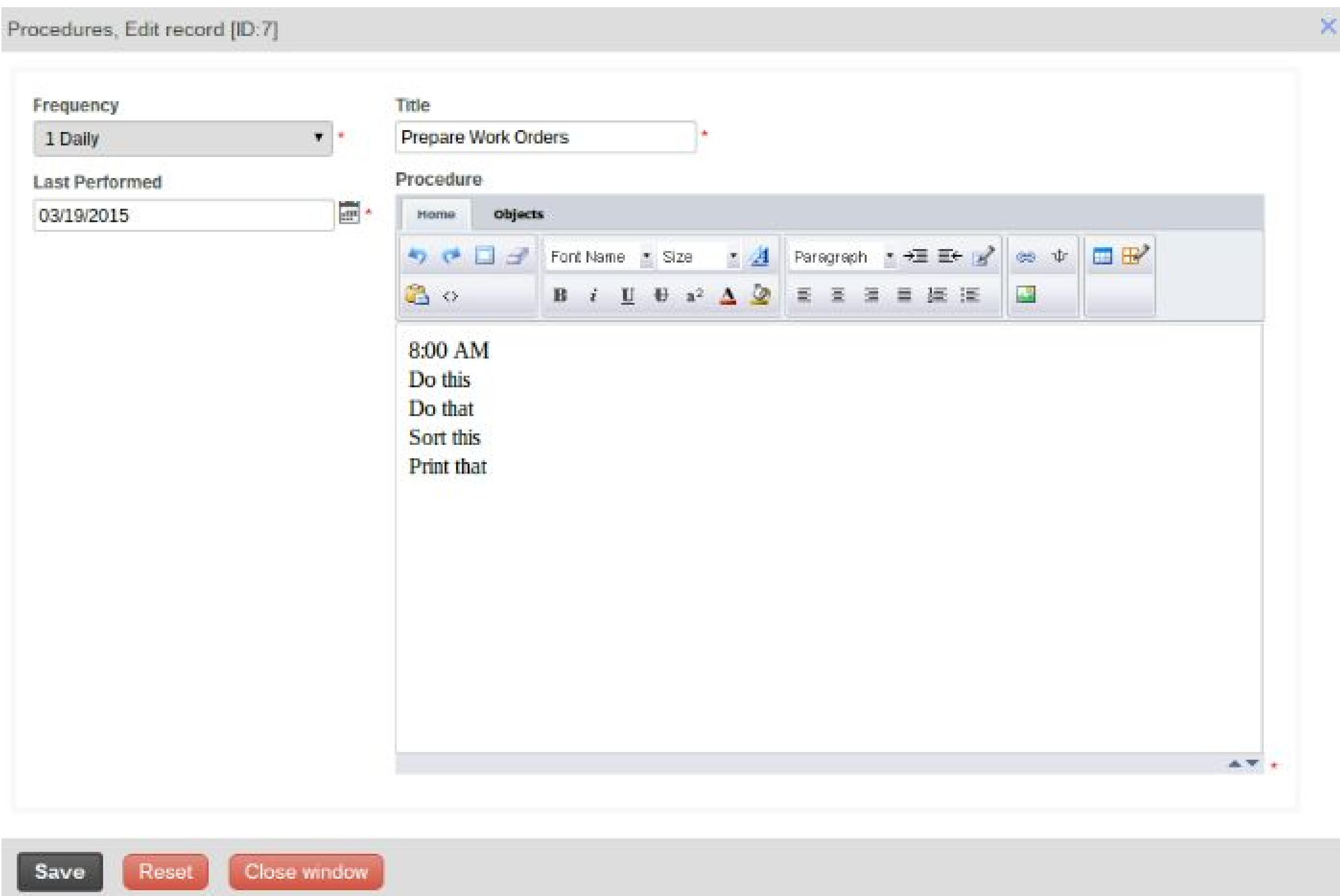
Back to Table of Contents

Procedures (optional module)

Every business has procedures. Most do not have them documented in any sort of formal way. So what happens when a key employee goes away on vacation. Do the wheels fall off? What about training a new employee. Do you want a previous employee passing on their bad habits? Do you, as a manager, even know the procedures and processes used in your office every day? What about the ones that aren't used every day, just occasionally. How long does it take you to remember how to do those and how many mistakes do you make?

Franchises, like McDonalds, know the importance of documenting processes. Find something that works then document it so it is easily repeated by anyone.

Zipline Order Engine now has an optional module for creating and maintaining your business procedures.



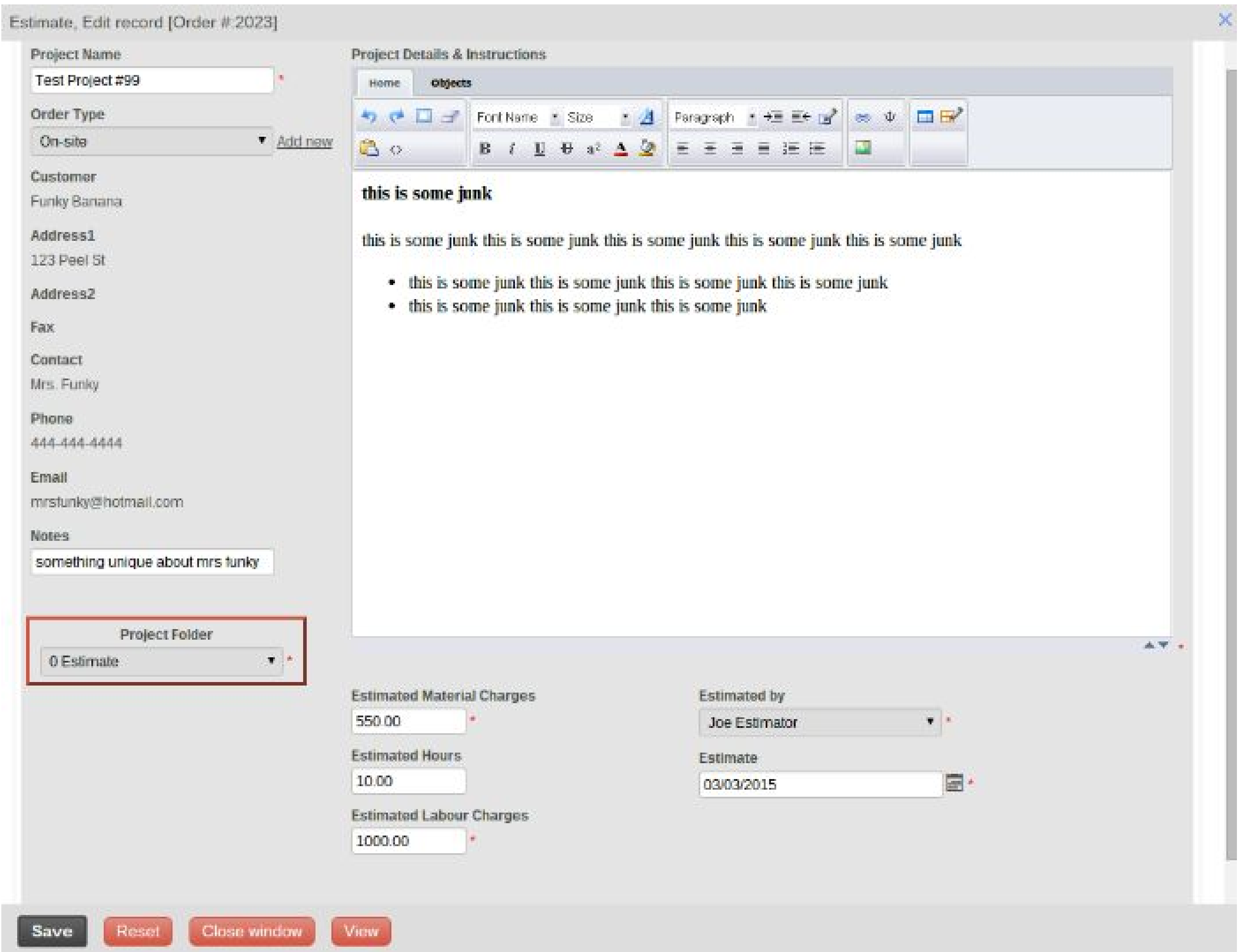
Daily, weekly, bi-weekly, monthly, annual, and random procedures. All at your fingertips. Take the time to document your procedures. It will improve your efficiency, cut down on errors, and even increase the resale value of your company.

[Back to Table of Contents](#)

Developing an Estimate

Zipline Order Engine is an excellent tool for creating estimates for customers then when an Estimate has been accepted by a customer you can quickly convert it to an Active project in the system.

To get started, switch to your Estimates folder by clicking on the main menu Estimate tab. This will open up the folder containing all of your active Estimates. Click the Edit button for the project you wish to work on. The edit screen pops up.



Begin with this form to develop your Estimate for a customer. The Project Details and Instructions field allows you to describe your work in great detail, everything your customer needs to know to make a decision on your quote. Next, you will need to enter the Estimated Material Charges, Estimated Hours, and Estimated Labour Charges. Select employee from the Estimated by drop down selector. Enter the date of your Estimate and then choose Estimate folder. Click **Save.**

[Back to Table of Contents]

To print an Estimate tag it (tick box) then click **Print Selected Estimate**. Note: you can tag multiple Estimate records for printing. They will print on separate pages.

To convert an Estimate into an Active project, click the Edit button beside the estimate. Change the Project Folder to Active in the dropdown list. **Save**. Done. The project is now active in the Active folder.

ACME

Acme Service Company
123 Main St Unit 2, Kalamazoo, BC, E1E 1O1

555-555-5555
joe@acme.com
www.acme.com

Estimate

Project Name:	Acme Test Project 1	**Estimate #:**	**2010**

Customer	Phil Diller Industries	**Contact**	Bob
Address1	555 Industrial Drive	**Phone**	555-555-5555
Address2		**Email**	bob@hotmail.com
Fax			
Estimated by	Joe Estimator	**Estimate Date**	2/27/2015

Project Details

March 5, 2015

We will do something and we will do something else.

This is a list of materials needed for the job.

This is item 1		250.
This is item 2		250.
	TOTAL	500.

This is some comment after the table.

Labour	345.00
Materials	456.00
Subtotal	801.00
Tax	104.13
TOTAL	905.13

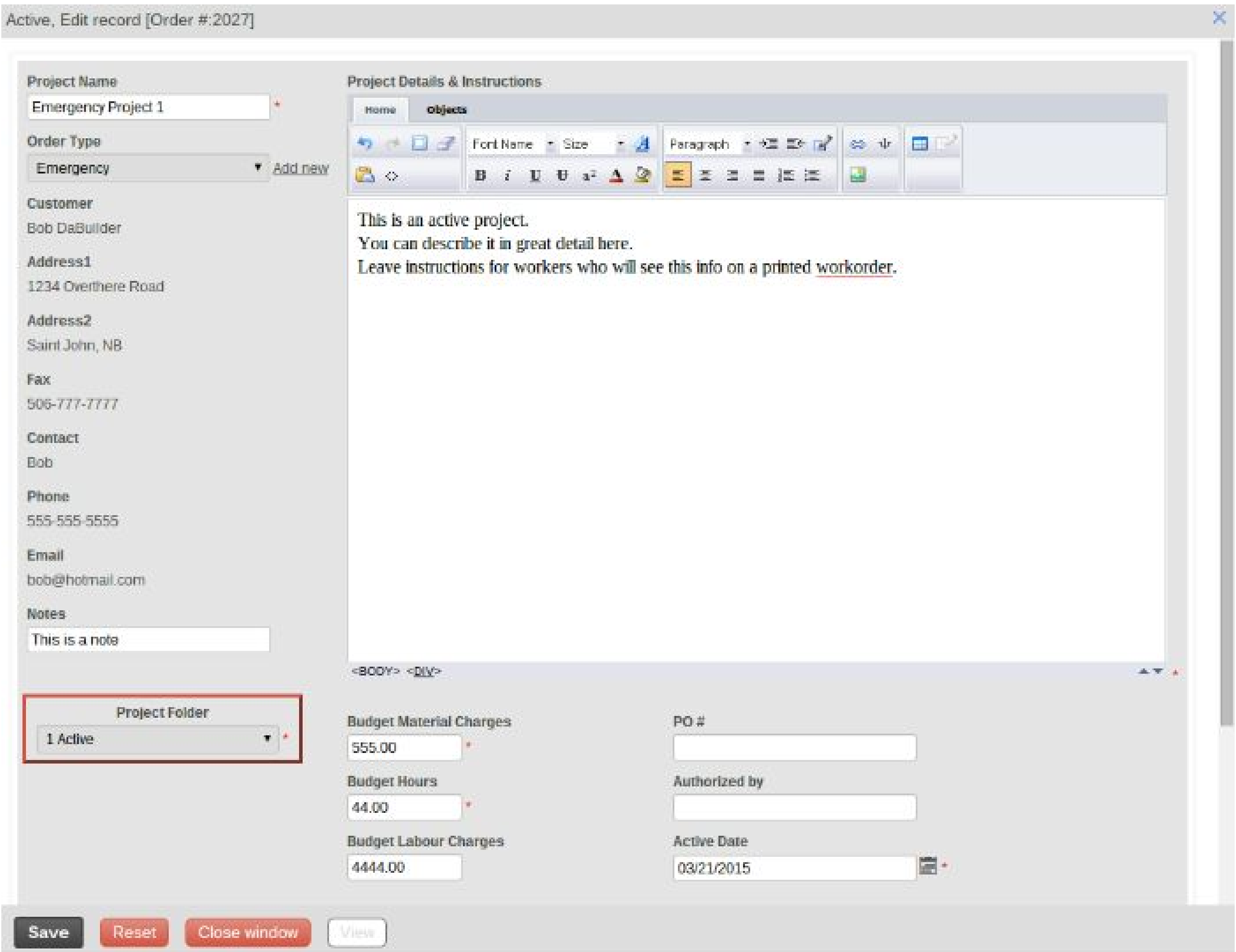
This Estimate is valid for 30 days. All prices quoted are in Canadian dollars. HST @ 13% is applicable on all goods and services.

Back to Table of Contents

Working with Active Projects

The Active projects folder is where all the action happens. Here, you can describe the project in detail, add budget times and costs, add time and materials, and print Work Orders and Bills of Material.

Start by clicking the Edit button beside a project. The edit popup appears.

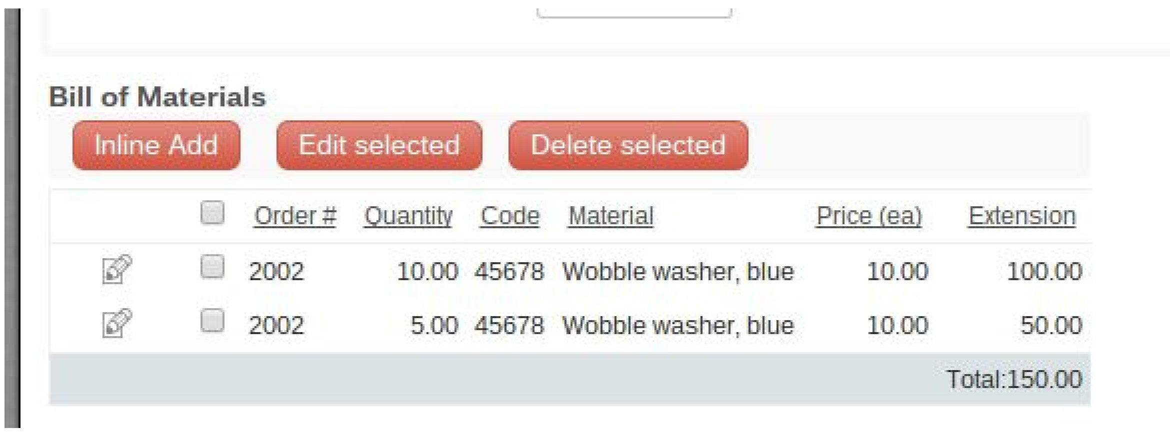


Describe your project in detail under Project Details & Instructions. Add Budget Material Charges, Budget Hours, and Budget Labour Charges. These fields will show on a printed Work Order.

Back to Table of Contents

Adding Materials to an Active project

At the bottom of the Active popup is the entry point for actual Materials. Click on Inline Add. Add all materials you will be billing out to your customer. You can edit existing Materials records by clicking the Edit button.

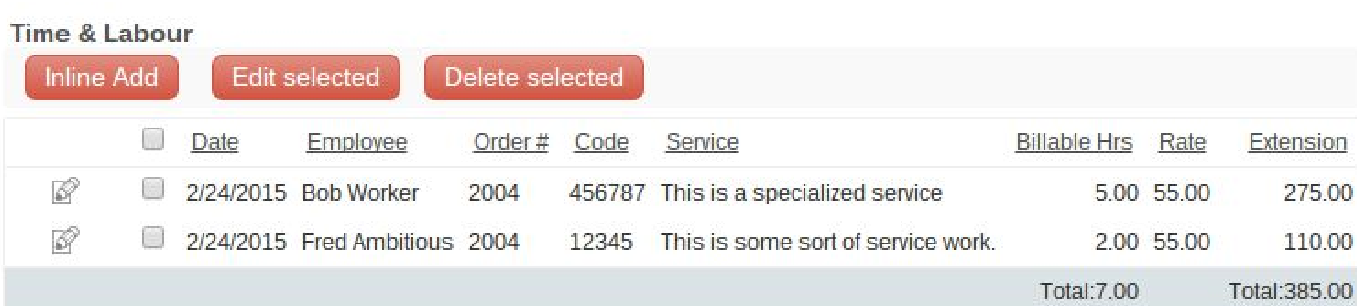


		Order #	Quantity	Code	Material	Price (ea)	Extension
		2002	10.00	45678	Wobble washer, blue	10.00	100.00
		2002	5.00	45678	Wobble washer, blue	10.00	50.00
							Total:150.00

! Add materials prior to printing the Bill of Materials for a project.

Adding Time / Labour to an Active Project

While you're at the bottom of the Active edit popup you will also see the entry point for Time / Labour. Add actual time records here as your projects progress.



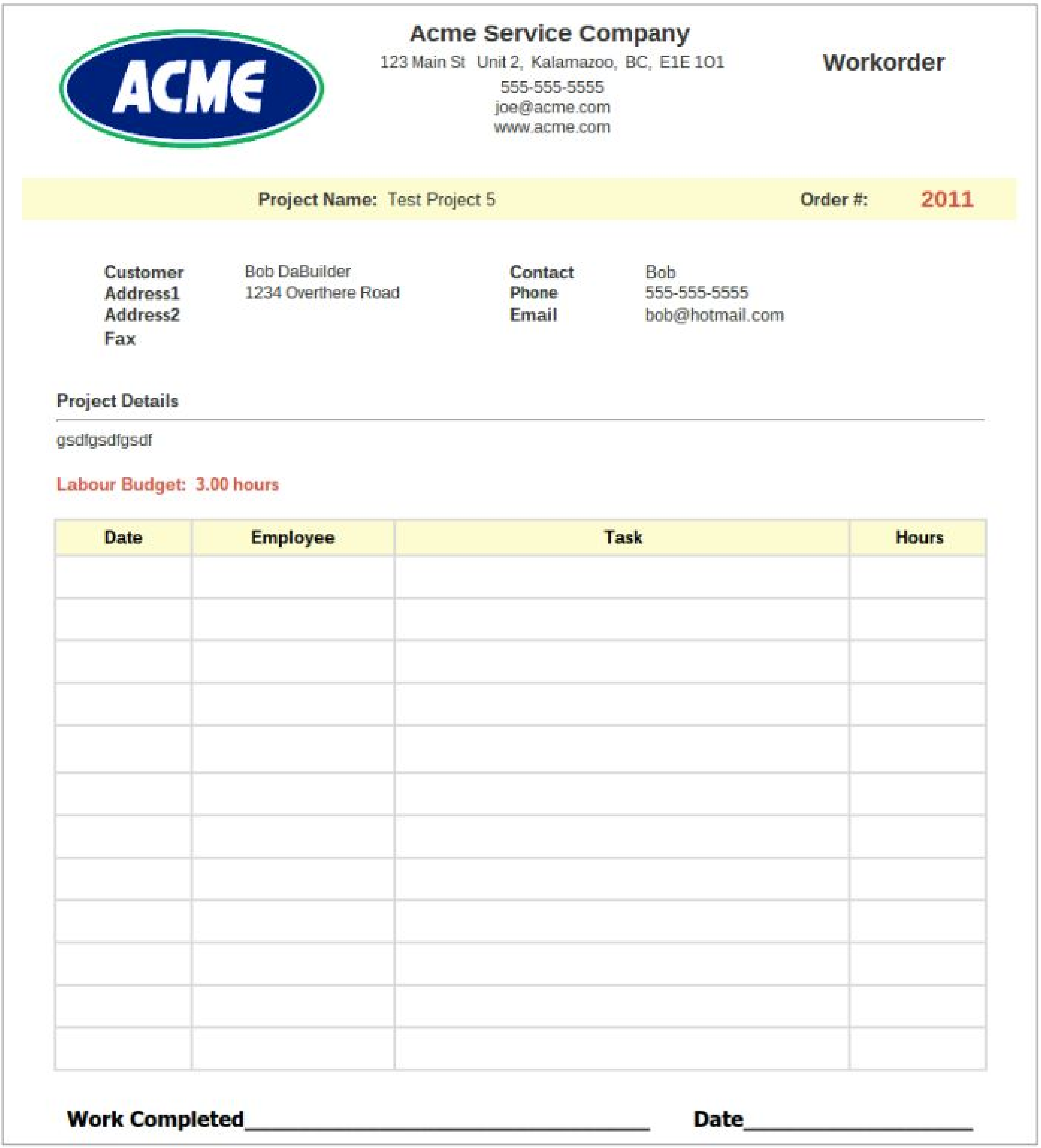
		Date	Employee	Order #	Code	Service	Billable Hrs	Rate	Extension
		2/24/2015	Bob Worker	2004	456787	This is a specialized service	5.00	55.00	275.00
		2/24/2015	Fred Ambitious	2004	12345	This is some sort of service work.	2.00	55.00	110.00
							Total:7.00		Total:385.00

! Time records can be added to an Active project at any time. They do not need to be added before a Work Order or Bill of Materials can be printed.

Back to Table of Contents

Printing a Work Order

Send your workers out with their marching orders for the day. The work orders printed from Zipline Order Engine show the customer details, project details, labour budget, and also double as a timesheet for workers to record their actual time on this project.



ACME

Acme Service Company

123 Main St Unit 2, Kalamazoo, BC, E1E 1O1

555-555-5555

joe@acme.com

www.acme.com

Workorder

Project Name: Test Project 5 **Order #:** 2011

Customer Bob DaBuilder

Address1 1234 Overthere Road

Address2

Fax

Contact Bob

Phone 555-555-5555

Email bob@hotmail.com

Project Details

gsdfgsdfgsdf

Labour Budget: 3.00 hours

Date	Employee	Task	Hours

Work Completed______________________________ **Date**__________________

Back to Table of Contents

Printing a Bill of Materials

Sending workers out with the proper materials for each job can be a challenge. How much time do you lose when employees have to return to the shop 3 times to pick up items they forgot or didn't know were part of the job.

Put a stop to these inefficiencies by printing a BOM which doubles as a picklist for each of the day's projects.

ACME

Bill of Materials

Order #	Customer	Address	Project Name	Active	Project Folder
2011	Bob DaBuilder	1234 Overthere Road	Test Project 5	3/24/2015	1 Active

Code	Description	Quantity	Picked
123456	Wobble Washer, red	2.00	❑
45678	Wobble washer, blue	4.00	❑
98098	Some sort of product	3.00	❑

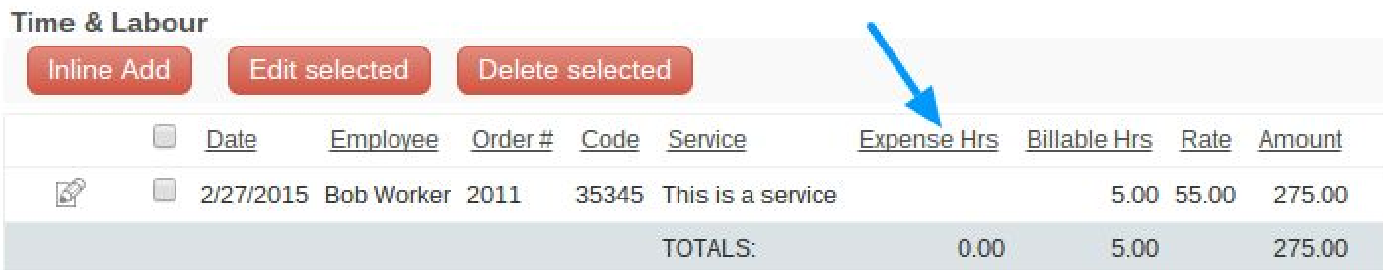
Print a Work Order and a Bill of Materials for each job on the agenda for the day. Your workers will know where they are going, what they are doing, how long they have to do it, and what materials they need to take with them.

Back to Table of Contents

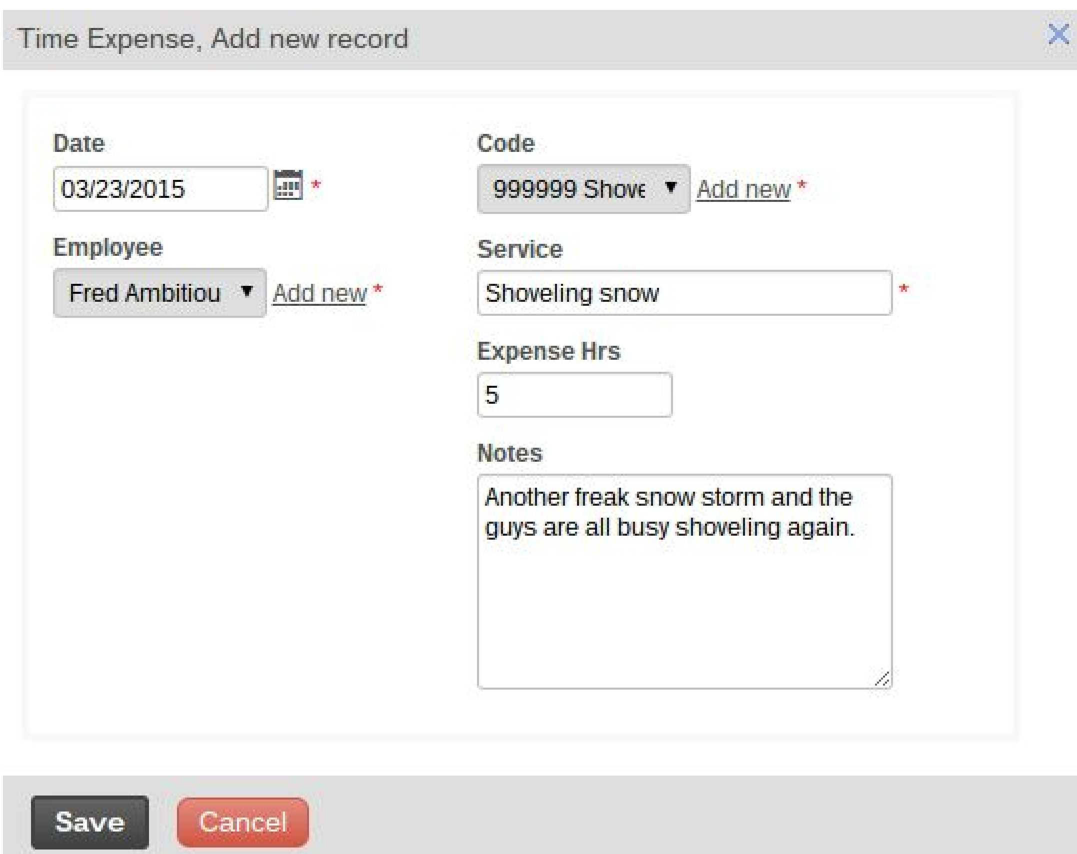
Expense Time

Quite often your employees will have non-billable tasks they have to perform. These tasks need to be tracked and controlled just like billable time. Zipline Order Engine gives you two ways to track expense time.

If the non-billable time is associated with a work order you can enter it in the Expense Hrs field when adding time and labour to an order.



If the expense time is something like sweeping the shop floor or washing the boss's car then it can be posted under Drill Down / Expense Time Records. This input form allows you to post expense time not related to a customer project.



Back to Table of Contents

Working with Completed Projects

When your work on an Active project is complete you can set its Project Folder dropdown to Complete. This will take it out of the Active folder and move it to Complete.

Complete records are now out of the direct line of fire. Material and Time records have all been added, descriptions tweaked, dates added, and work finished. You can now run a pre-bill report on any or all Complete records.

To Print a Pre-bill, tag the record(s) you would like to print. Click **Print Selected Prebills**.
Your Pre-bill report will look like this:

Prebill Report

Page 1 of 1

Ordernum	Customer	Address	Project Name	Start Date	Invoice #
2004	Charlie's Fries	123 King St	Test Project 5	2/24/2015	

This is a description of the work we will be doing. This is a description of the work we will be doing. This is a description of the work we will be doing. This is a description of the work we will be doing. This is a description of the work we will be doing. This is a description of the work we will be doing. This is a description of the work we will be doing.

Budget Time and Materials

Time	5.00 Hours	$ 500.00
Materials		$ 1,000.00

Actual Time	**Hours**	**Rate**	**Extension**
This is some sort of service work.	2.00	55.00	110.00
This is a specialized service	5.00	55.00	275.00

Actual Materials	**Qty**	**Price**	**Extension**
Wobble Washer, red	20.00	10.00	200.00
Wobble washer, blue	20.00	10.00	200.00

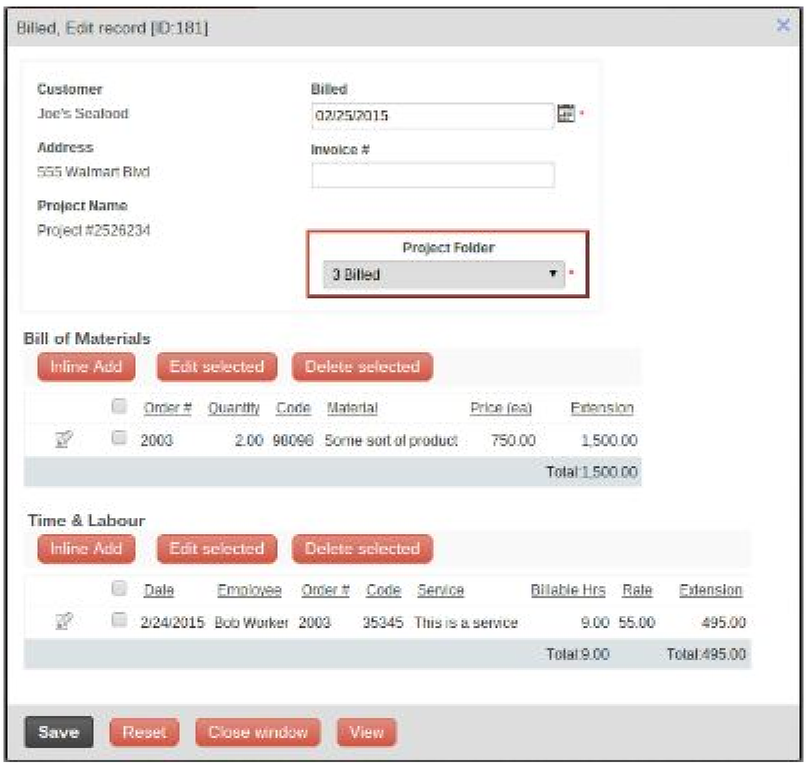
! The Pre-bill shows budget to actual comparisons and allows you to tweak your projects before sending them over to billing.

Back to Table of Contents

Working with Projects in Billing Folder

OK, so your Completed orders have all been fine tuned. They're ready to go to Billing. Send any Complete order to Billing by selecting Project Folder: Billed.

Once a project is set to Billing you will be unable to edit most fields on the order. This is to prevent accidental changing of an order after it has been billed. You are allowed to add / edit an Invoice # and change the default Billed Date on a Billed order.



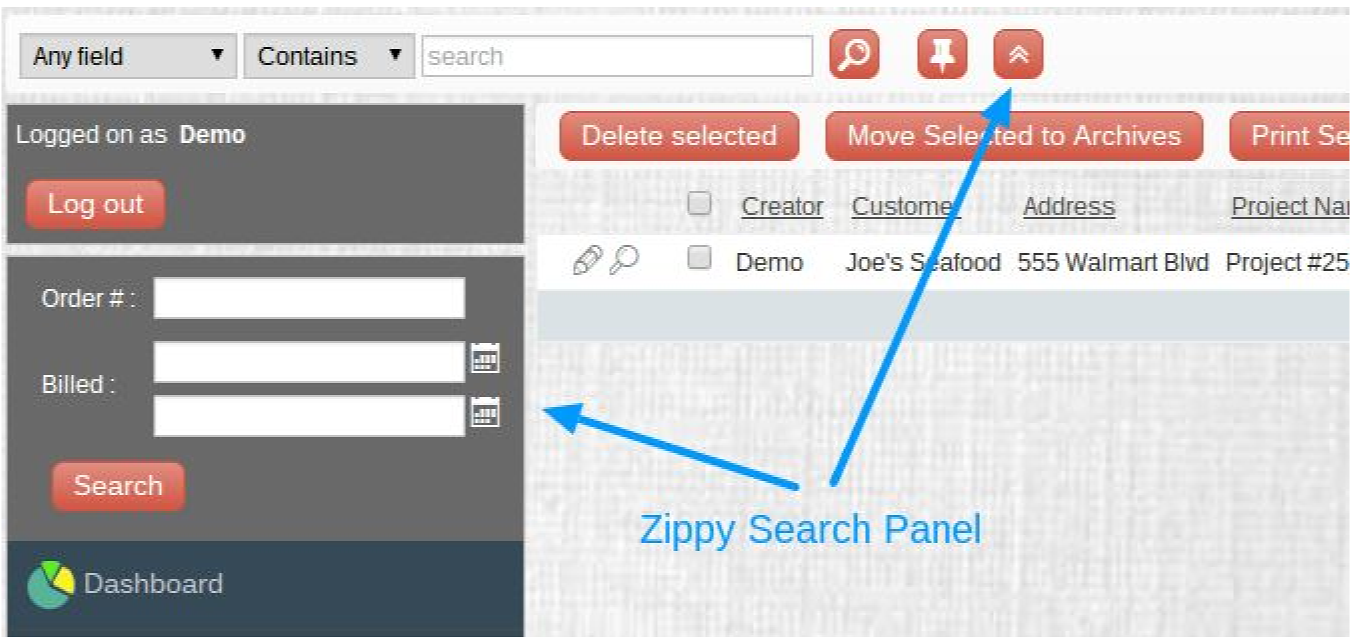
!	If you discover a mistake in a Billed project you can re-edit the project if you change its Project Folder back to Complete.

[Back to Table of Contents](#)

Searching for Billed Projects

Your Billed project list will tend to become quite long over time. The Billing folder has a special Zippy search panel above the menu to help you find things quickly.

!	If you don't see the search panel as shown in the screenshot below it's just hidden. Click the little up / down arrow control to make it show or hide.



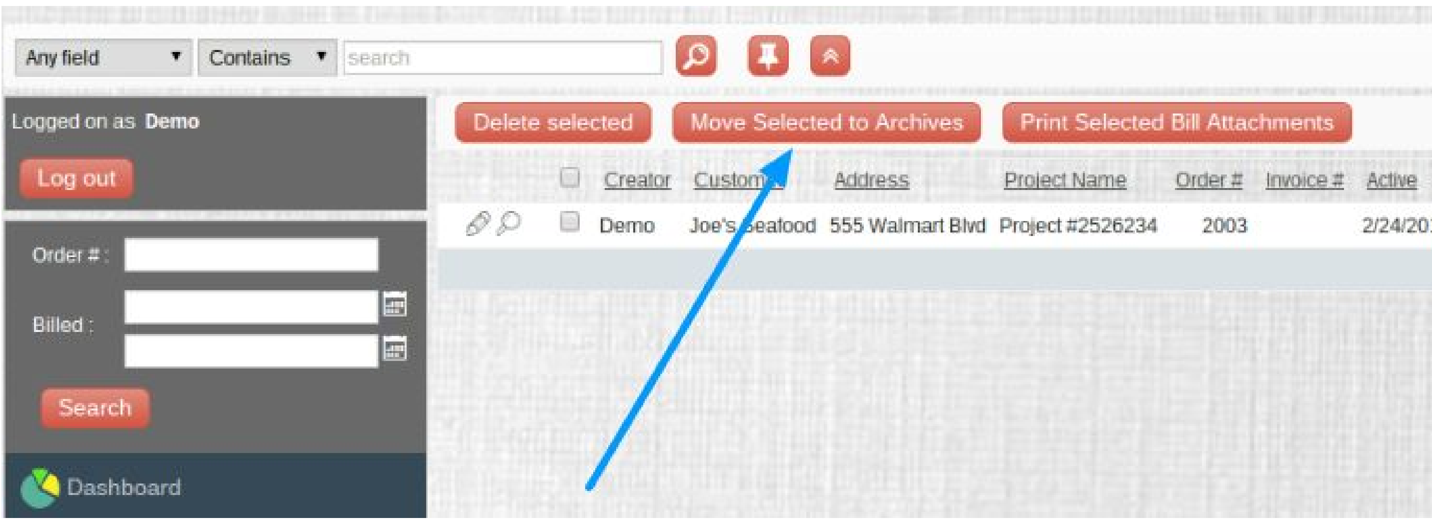
Using the Zippy Search panel you can quickly search for a specific order number or a project that falls within the range of two dates.

Back to Table of Contents

Archiving Projects

Over time your Billed Project list will become very long and unwieldy. You can move all the older or inactive records to the Archives to maintain a manageable current record list.

Move records the Archives by tagging them and clicking the **Move Selected to Archives** button.



! You can move a group of records to Archive based on any regular search criteria or a set of 'between' dates set in the Zippy Search panel found on the left above the menu.

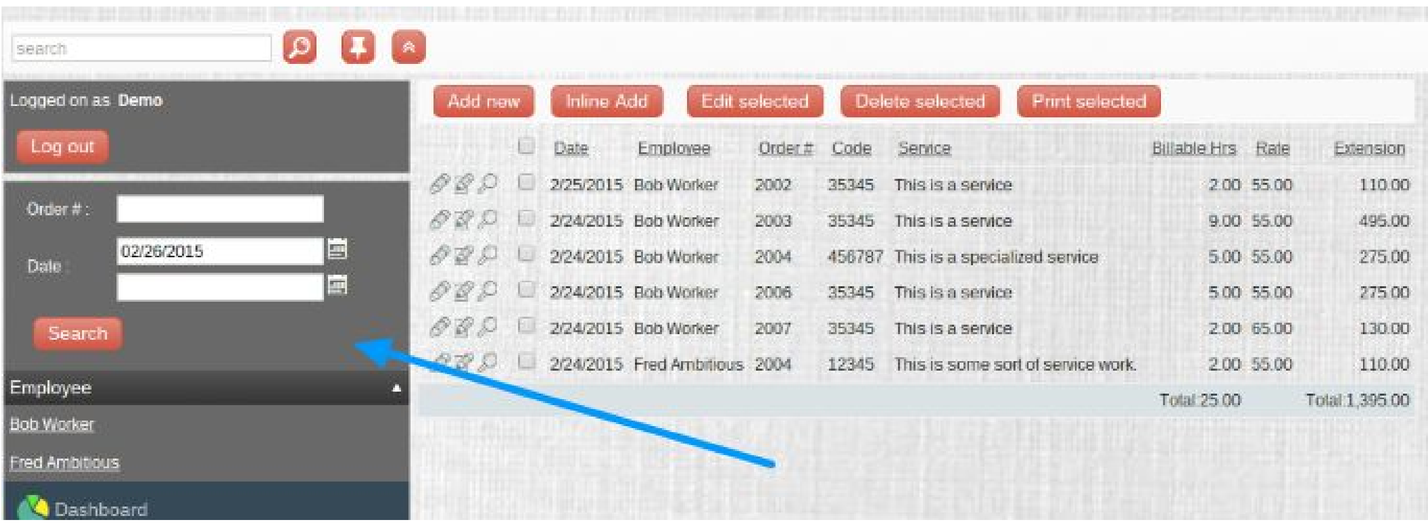
Moving projects to Archive also moves associated Time and Materials records to archive. If you Un-Archive a project all of its associate Time and Materials records will be un-archived as well.

Back to Table of Contents

Drill Down Views

Some lists, like Time or Material records, can grow to the point where it becomes difficult to find the records you are looking for. This is where a Zip Search comes in handy.

Zip Searches have special search capabilities allowing you to filter a long chaotic list down to a relevant short list.



- The Time Zip Search allows you to search on Order # and 'between' dates. You can also click on an employee name to filter the list by employee.
- The Materials Zip Search allows you to search Material records by Order # or product code.
- The Archive Zip Search allows you to search the Archives for Order # or billed 'between' dates.

!	Don't forget that you can also sort Zip Searched records by clicking the column headings.

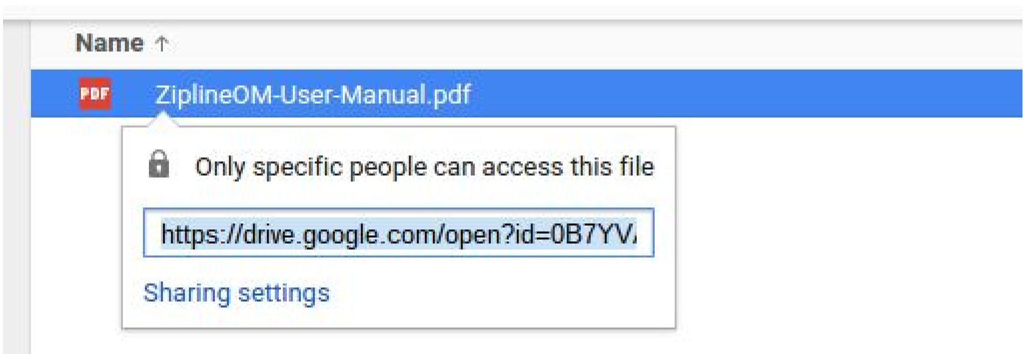
[Back to Table of Contents]

Linking to External Documents

You may have relevant external documentation in pdf format that you would like to associate with a project. You can do this easily. This article describes how to share and link to documents using Google Drive.

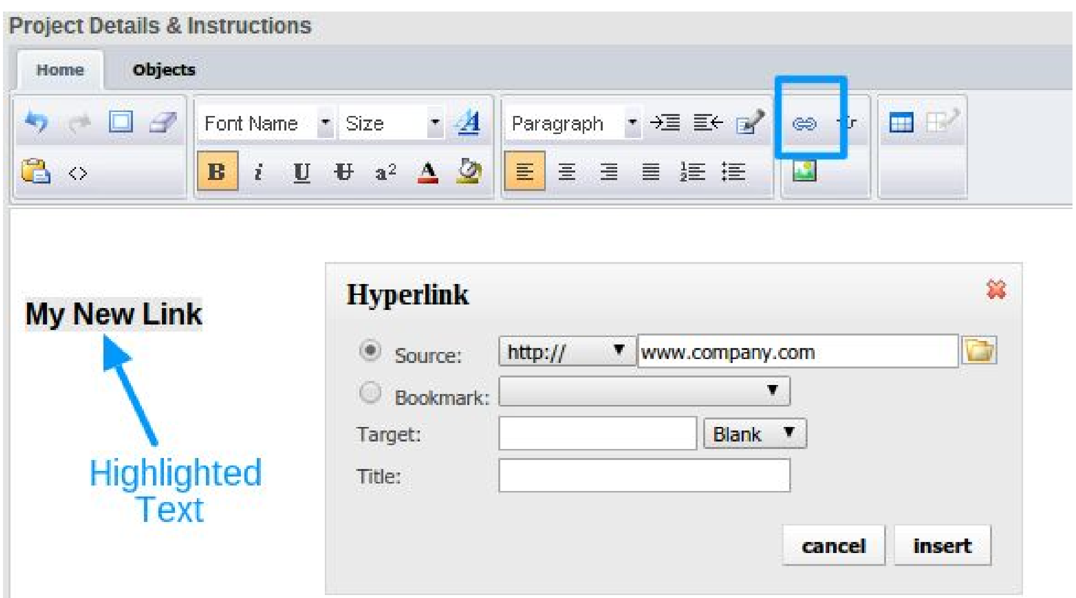
Create a new folder on Google Drive, call it whatever you like. Right click on the folder and click share. You can share your documents from this folder with one person, several others, or the whole world, you choose. Next, copy all your shared pdf(s) into this folder.

Right click on any pdf then click Get Link. A url will come up in a little window. Make sure the url is highlighted then hold down the ctrl key and press C. This will copy the link to your clipboard.



Back to your Zipline project, Edit, Project Details and Instructions field.

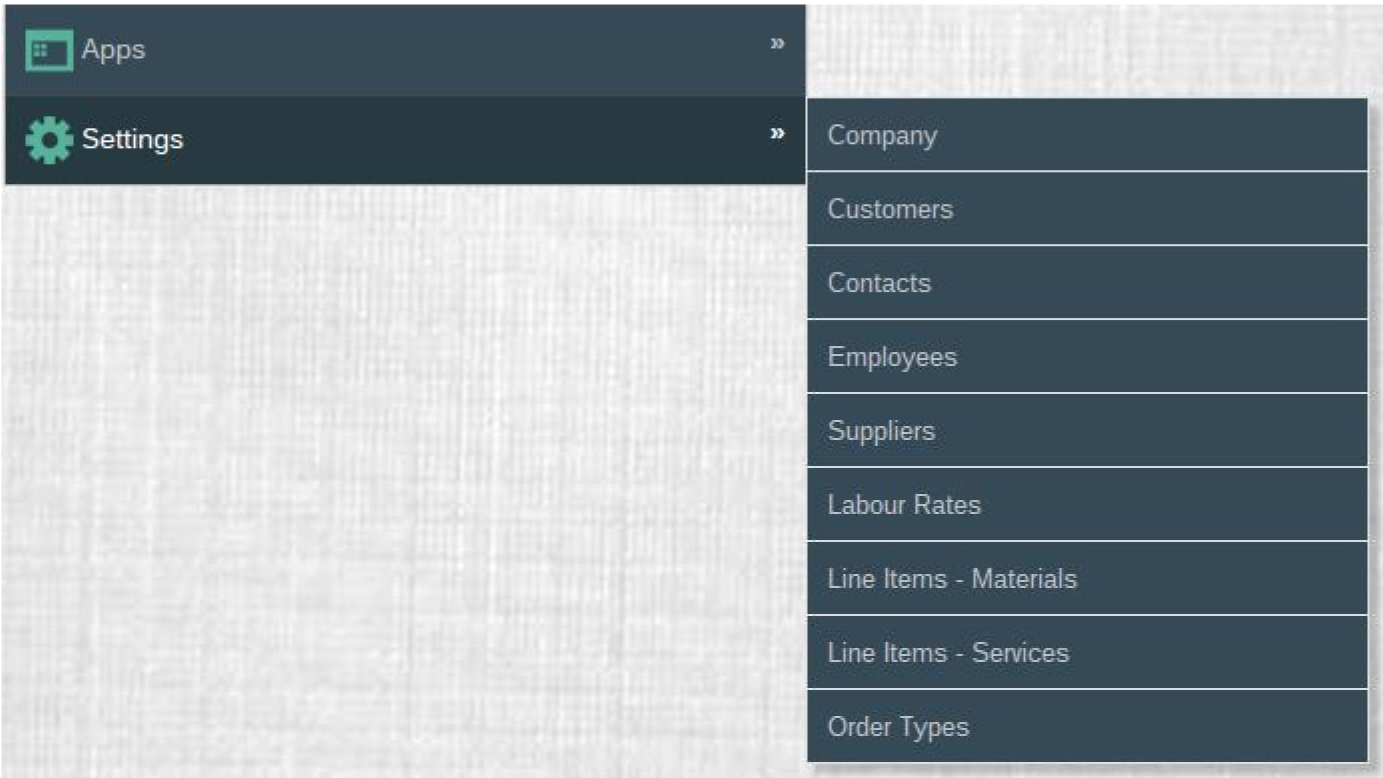
Type a name for the document you will be linking to. ie Floorplan, Network Layout, etc. Highlight the name. Click the link button on the top menu bar. Click in the URL box then hold down the ctrl key and press V. The url will be pasted into the box. Just below select Target: _blank then click Insert Link.



Back to Table of Contents

Settings

Under the Setting tab you can customize many things that are specific to your company. Most of them will be self explanatory.

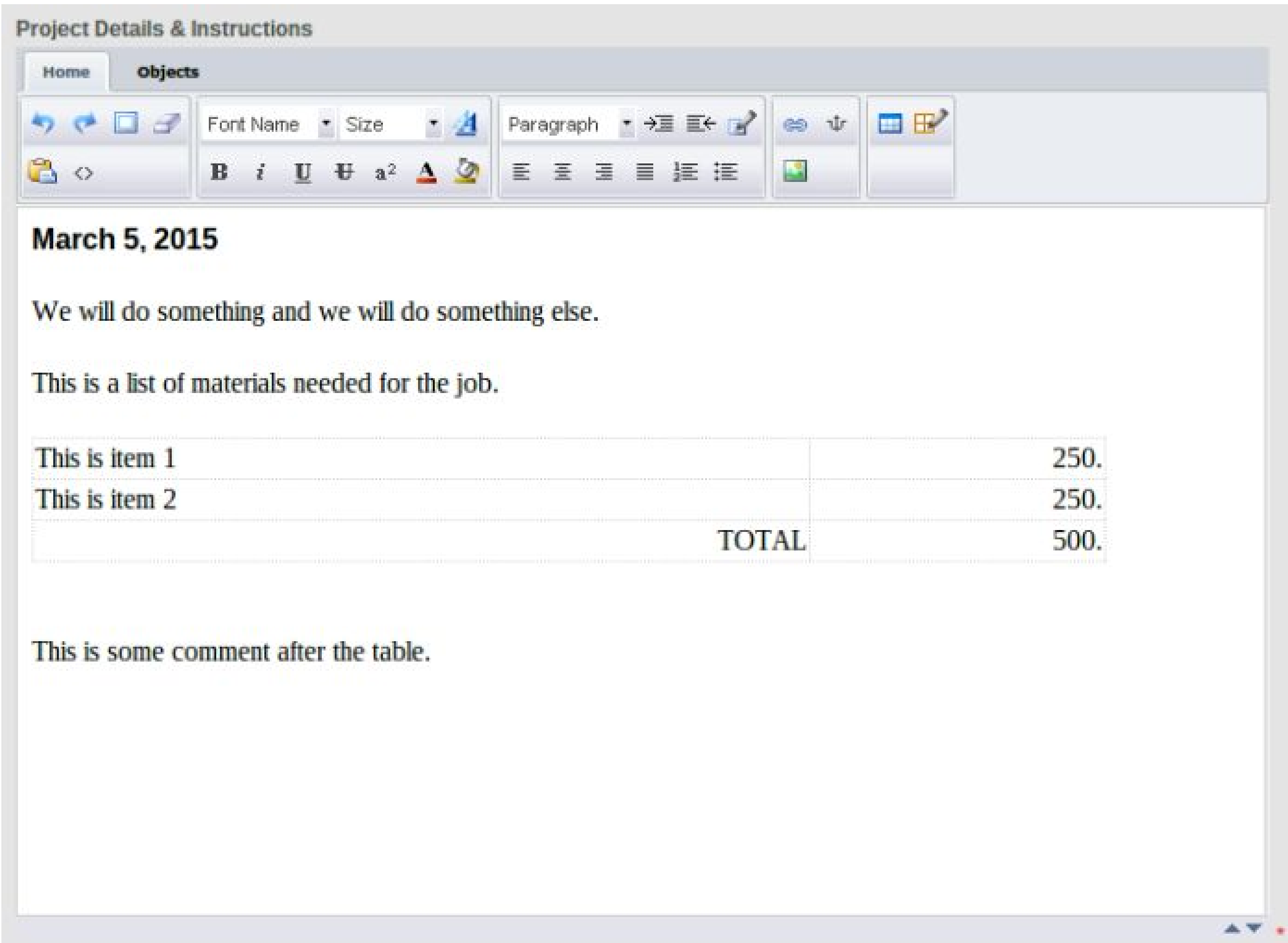


!	You should check your settings in each of the settings tables so that correct 'system' information is available to all modules of the program.

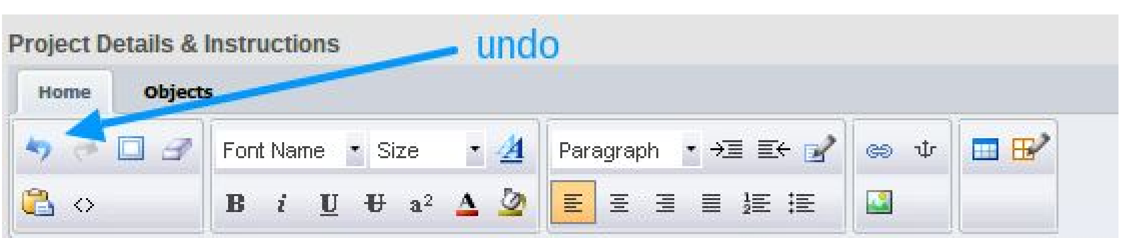
Back to Table of Contents

Innova Editor

The Innova editor is now incorporated in the Zipline estimates, active, and complete edit popups. It enables some extensive formatting of Estimates, in particular, so that your customers get a professional looking document from you.



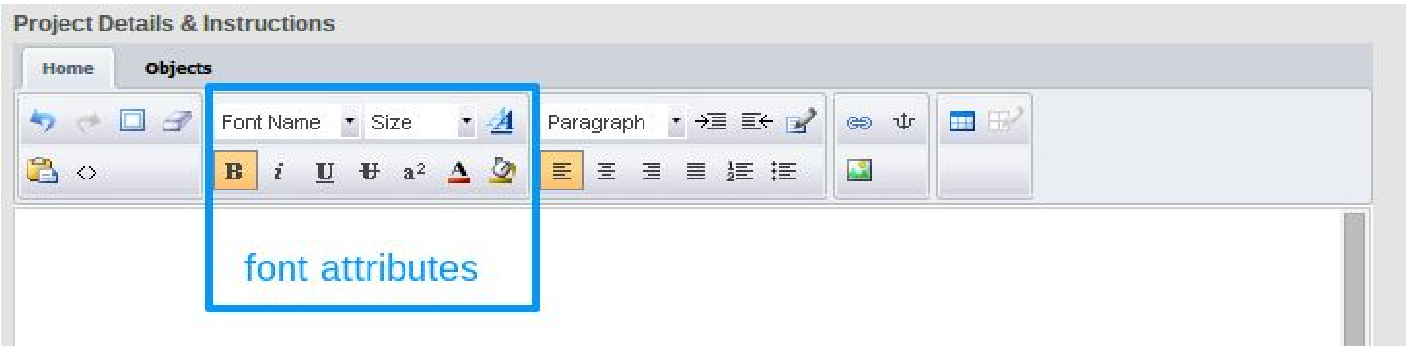
Make a mistake? Don't worry, just click the Undo button.



Back to Table of Contents

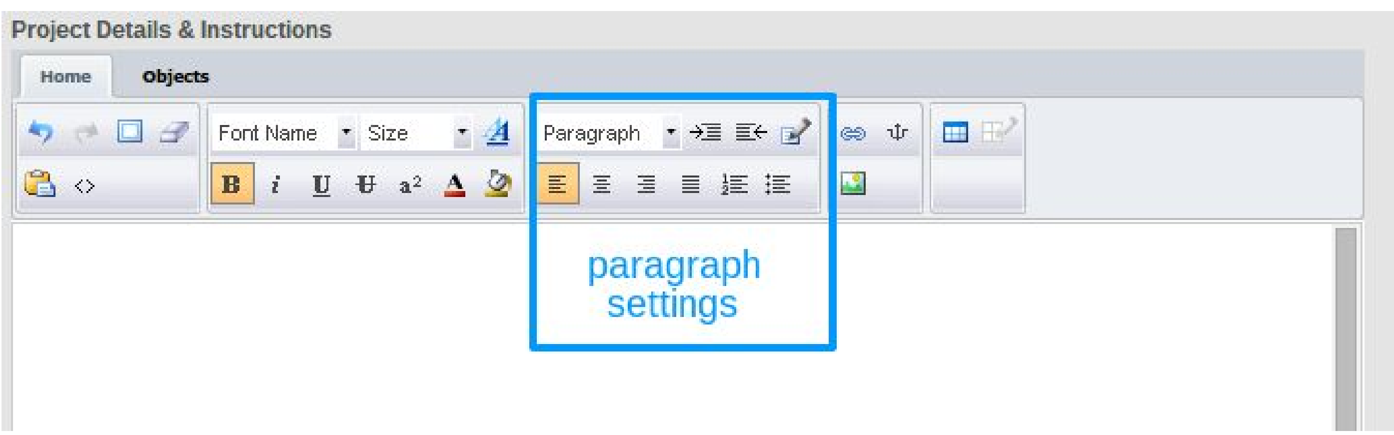
Font Settings

You can set the font type, size, bold, italics, underline, strikethrough, superscript, and colours. Highlight the text you wish to change then choose font attributes from the editor's header.



Paragraph Settings

In most editors like Innova a paragraph is one line or more of text. For example, the heading above can be considered as a paragraph just like the text in this paragraph you are reading. Set the attributes of a paragraph here.

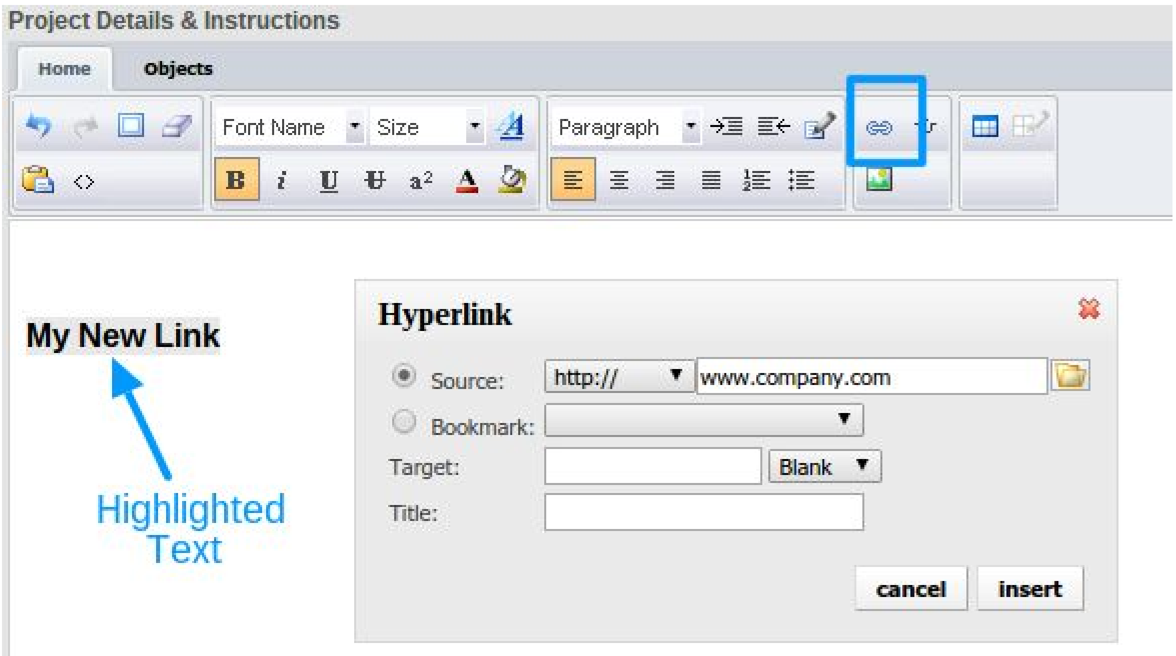


Style, indent, outdent, left / center / right justification, and bullet lists are the paragraph settings available. The settings will be applied to any highlighted text on your page.

[Back to Table of Contents]

Creating a hyperlink

Hyperlinks can be embedded in your Innova document. Simply highlight the text that is to become your new link. Click on the link button.

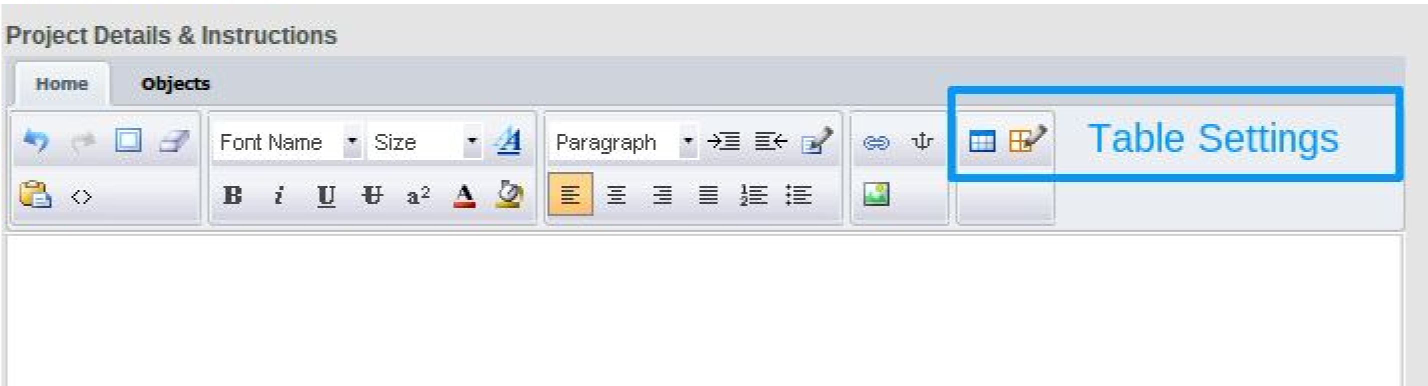


A little popup window will let you define the parameters of your link. Setting the target as blank will make the link open in a new browser window without closing the original window your viewer is using. Click insert when finished.

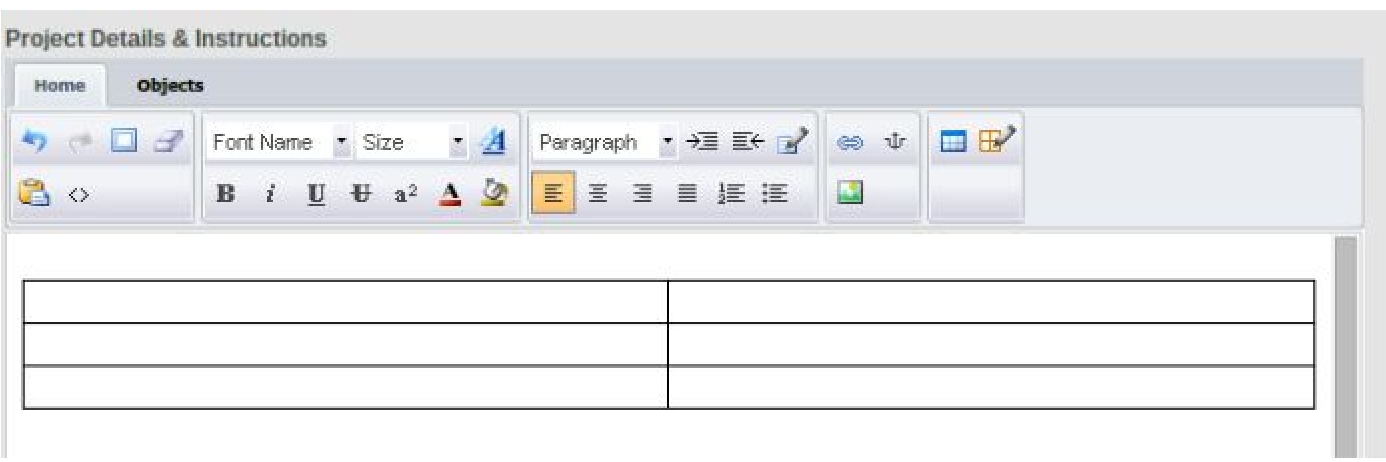
A hyperlink can reference not only a website but it can open up a pdf document for your customer to view or it can also be used as an email link which your customer can click on to contact you via email. These are more advanced use of hyperlinks that may require configuration on your end. Please contact us for help if you get stuck here.

Creating and Using Tables

Tables are a great way to format and display tabular information like parts lists or services and prices so that everything stays lined up in nice columns and rows like a spreadsheet.

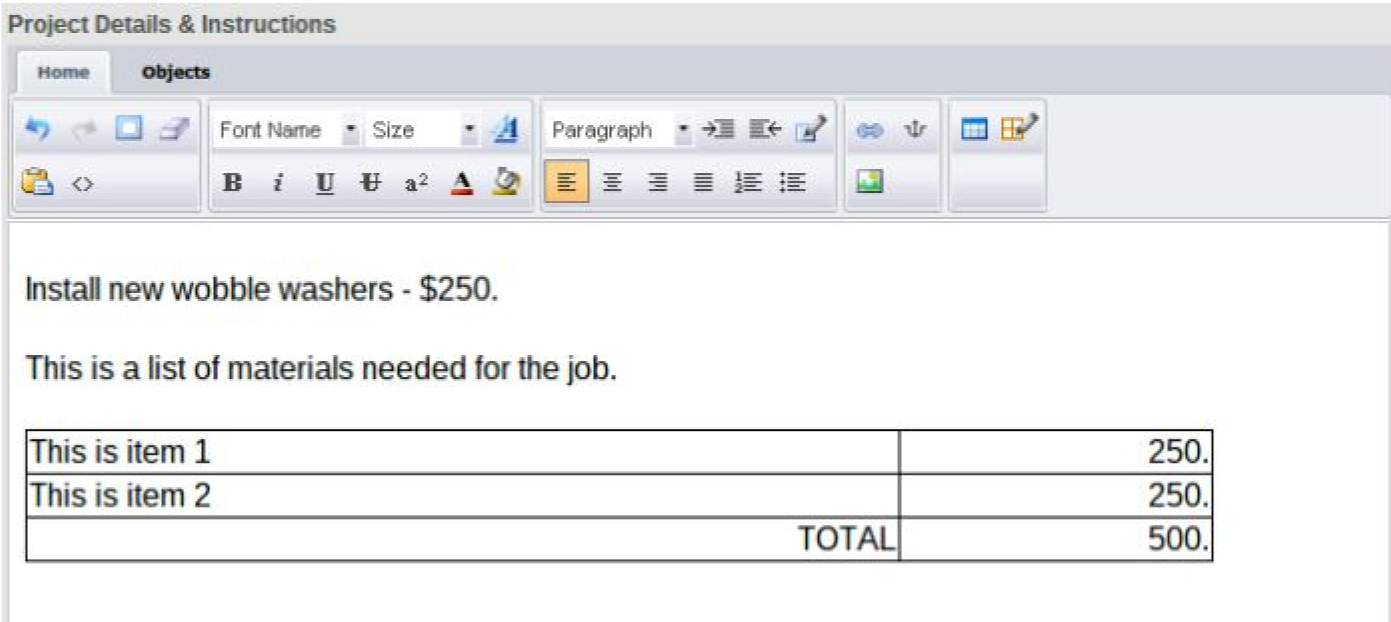


Clicking the little blue table icon will open up a pick list for choosing the number of columns and rows for your table (you can change this later). Highlight rows and columns with your mouse and click to finish. A new table will appear in your document.

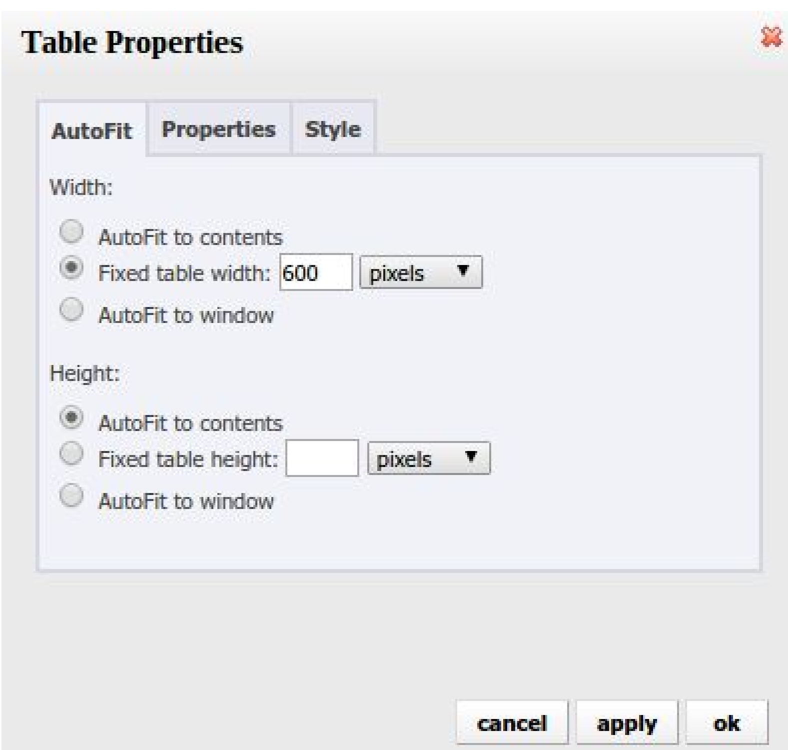


[Back to Table of Contents]

You can fill in the table’s cells just like you would any spreadsheet. You can also use any of the font or paragraph attributes to format the text in your table. ie right justify numbers in a price column.



To edit the attributes of the table itself, such as width, borders, and placement on the page click the little red table edit icon on the editor’s toolbar. Here, you will find all sorts of settings to change the look and feel of your table. Don’t be afraid to experiment with the settings to get your desired outcome.



Back to Table of Contents

Recommended Hardware

Zipline programs run in a web browser on most any platform. You do not need any special hardware.

One item, though, which will make your job easier, is a large landscape format LCD monitor. Not only will this be helpful for Zipline displays but it will make working on spreadsheets much happier.

These monitors are not expensive these days, well worth the cost.

Back to Table of Contents

In the Works

- Mobile - add orders, time, and materials remotely
- Automatic scheduled email status reports
- Charts and graphs
- Data Connectors to Quickbooks, Wave accounting, and Freshbooks
- Recurring orders
- System user logs

Back to Table of Contents

Zipline Order Engine Change Log

v 1.33 - July 6, 2015
- change sort order to code on materials
- add date to work order
- set default records per page to 200
- fixed bug in order type add

v 1.32 - May 14, 2015
- added estimate archiving
- fixed bug in contact add

v 1.31 - Apr 4, 2015
- added view / export time & materials records within archives
- moved Google VM to new hardware, updated to Ubuntu 14.04.1 LTS on VM
- added SSL cert to cloud server, created om.zipline.tools sub domain

v 1.30 - Mar 21, 2015
- fixed columns throughout that were not sortable
- default sort order set to customer on all lists
- arrange columns in consistent order across lists
- don't allow duplicate item or service codes
- removed archive choice from billed dropdown
- removed address column from all lists
- enabled export on all pages
- cosmetic fixes on pipeline and procedures
- fixed search box on time list page
- cosmetic changes on reports
- address2 and fax fields added across the board

v 1.28 - Mar 12, 2015
- added type field to orders
- changed expense time notes to 300 char and entry as text area
- tweaked sub menu colours

v 1.27 - Mar 11, 2015
- re-arrange vertical menu to work better on small screens
- update menu icons for better clarity
- connect materials quantity with inventory quantity on hand
- added apps to menu, added procedures to apps
- added pipeline folder
- fixed bug in time archiving

v 1.26 - Mar 10, 2015
- add note field to expense time record
- add totals to pre-bill report

Back to Table of Contents

v 1.25 - Mar 9, 2015

- reconfigured archive to move records to separate archive table
- move associated time and materials records to archive tables too
- fully implement pipeline and procedures modules
- added dropdown box to select modules
- inventory, pipeline, and procedures still under construction

v 1.24 - Mar 7, 2015

- squashed bugs in Innova editor
- cosmetic changes to edit screens to accommodate Innova
- update this document with Innova tutorial
- added subtotals to time and materials on bill summary
- removed budget numbers from bill summary
- added expense time to zip views

v 1.23 - Mar 6, 2015

- enlarged details edit field
- installed Innova editor then uninstalled after timeout errors
- cosmetic changes to add / edit pages
- added header links to inventory, pipeline, and procedures (not fully implemented yet)
- cosmetic changes to vertical menu

v 1.22 - Mar 4, 2015

- changed extension to amount on various reports and screens
- cosmetic changes to vertical menu to work better on small display
- added inventory, pipeline, and procedures to menu (not active yet)
- fixed a bug preventing adding material code on the fly

v 1.21 - Mar 3, 2015

- fixed missing labels on estimate and work order fields
- added estimate as folder choice on active order
- don't show empty fields on views
- cosmetic changes on pre-bill, bill summary, and BoM

v 1.20 - Mar 2, 2015

- moved services out of inventory to separate table
- fixed bug in billing attachment not showing html
- fixed price not auto-filling in material add
- added modules to menu
- fixed bugs in lists not displaying address field correctly
- added recommended hardware to user manual
- hide empty fields on view screens

v 1.10 - Feb 27, 2015

- auto-populate price field from line items for materials
- added expense time field
- changed customer table, added contact table to allow unlimited contacts for a customer

Back to Table of Contents

- enabled linking to a PDF from detail field
- enabled rich text editor for order details fields
- completed this user manual
- cosmetic changes to reports
- fixed bug in BOM report causing PHP error

v 1.01 - Feb 25, 2015

- cosmetic changes to view pages
- added dashboard auto-refresh every 60 seconds
- show version # in page heading
- add header links

v 1.00 - Feb 20, 2015

- production version
- installed on VM in Google cloud

Back to Table of Contents