



## **Citrus Construction Scheduler**

### **User's Manual**

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Price 7.95 USD  
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## Overview

**Citrus Construction Scheduler** is a program which schedules events (milestones) for construction projects to different work groups or individuals within your company, or to sub-contractors. The program works in conjunction with Citrus Dispatcher to control work schedules and prevent duplicate scheduling.

An event (milestone) can be administrative or technical in nature; EG Obtain a Building Permit or Pour Foundation.

An event can be dependent on the completion of a previous event.

Each event is assigned a duration in hours or days.

A starting day/time is selected for each event and existing work schedules for technical personnel are checked to prevent conflicts.

Administrative events are simply assigned to a date.

Other Features are:

- Create a Holiday List to prevent scheduling on Holidays, Vacations etc.
- Create Work Orders

## The Setup Screen

The *Setup Screen* is where you enter the information needed for the basic operation of the program.

It contains a File Folder with seven tabs; one is a *Help* tab which contains brief instructions about the other tabs.

### ***Business Info***

Enter the Information about your Business.

### ***Assignments***

Create a list to which *Events* will be assigned.

### ***Company Logo***

Select a Logo and Save it.

### ***Operations – has 3 sub-tabs***

#### ***Work Days***

These settings are used throughout the program to assign events to the proper days of the week.

**Allow Scheduling These Days** – Select the Workdays you wish to schedule. This should be your normal workweek.

**Start Time** – Your typical starting hour of the work day.

***Phone Connection*** – used for auto dialing.

***Printing***

**Print in Color** – Documents can be printed in color or Black only.  
If you opt for color, you can select 2 colors for Borders and Text.  
You can select a font, but not a font size.

***Milestones*** – Create a list of events (milestones) which must be tracked and scheduled for a construction project. List should include events for your most complex projects. (When creating a project, individual milestones can be omitted if not required.)

***Attributes*** – Further define the requirements of each milestone.

- **Performed by** – milestone is either administrative or technical
- **Accomplished** – when during the project is this milestone performed; before, during or after construction.
- **Dependency** – the milestone may require the completion of some previous milestone before this milestone can commence.

## **The Main Menu Screen**

**Create a New Project** – The process of creating and scheduling a construction project.

**Manage Existing Projects** – Events of previously created projects can be completed, re-scheduled or deleted.

**Create a Work Order** – This is a document for your personnel. It is not a Proposal or customer document. It details work needed to be accomplished. You can create a Completion Report as well. The Work Order may or may not correlate with a construction project.

**Print/View Work Schedules** – See all events scheduled for work teams by date, including service attentions.

**Print/View Administrative Events** – See all events for a given date range for administrative personnel.

**Schedule Holidays, Vacations** - Create a list of workdays to which events can not be scheduled.

**Set Unattended Call Monitoring** – Log incoming calls while away from the office.  
(This feature requires a special modem).

## **The Menu Selections**

The “**Main Menu Screen**” contains drop down menus:

**Files** - displays a drop down menu with the following sub menus:

- **Create/Modify**  
Information needed about your Business and the way you do business is entered and can be modified by selecting this menu. See **The Setup Screen** (previously) for details.
- **Exit**  
Exit ends the program.

**Order Forms** – an Internet link to companies supplying forms needed for Citrusware Programs.

**Update** – Download the latest version of Citrus Construction Scheduler.

**Help** – Points you to the Help File.

## Getting Started

### Setting up the Programs Basic Files

When the program is first run, some information does not exist, unless you have previously installed a different Citrusware Program.  
(Programs share common information).

The **Setup Screen** will automatically display. You can also display it at any time to modify existing information by selecting *Files* from the Startup Menu Bar, and then *Create/Modify* from the Drop down Menu.

(Clicking on our Logo advances the Tab Selection)

#### ***Business Info***

Enter the Information about your Business.

Select the Type of address scheme to use (USA or International)

If you use a USA Style address, you must enter a zip code.

The Pencil image reloads your data from a previously saved file.

The Eraser image clears all Business Data Boxes so you can re-enter if needed.

#### ***Assignments***

You can create up to 40 Assignments. If assignments have been created using some other Citrusware application, the list will be loaded.

It is best to refer to an assignment generically, rather than by specifics, such as employee name.

Assignments are common to other Citrusware Dispatching Programs and may appear automatically.

Adding or deleting Assignments will affect other Citrusware programs.

If some portion of a project will be performed by a sub-contractor (s), create an assignment for each.

We suggest you create one more assignment than you think you need.

#### ***Company Logo***

Your Logo consists of two files; the actual Logo image file which you provide, and a Logo description file the program creates.

It is important you copy your logo image file to your Citrusware Folder BEFORE selecting it.

Location: **Hard Drive (usually C): /Program Files/Citrusware**

The program creates the Logo description file and locates it where the Logo image file resides.

If you were to select an image from a removable disc or a system disc which might not be available at all times, the program can not find it and an error will occur.

#### ***Operations***

##### ***Work Days***

**Allow Scheduling These Days** – Select the Workdays to which an event can be scheduled.

This should be your normal workweek.

**Start Time**- This is the starting hour of your work day.

**Phone Connection** – You can use your Computers Modem to dial customers from a number of places within the program. Daisy chain a telephone off of your modem card. Tick the **A Phone is Connected** checkbox.

Find your modem port number in your computers Control Panel; Click START (lower left), Settings, Control Panel, Double click the Phone and Modem ICON, select the Modem Tab. Find the port number of your modem under the Attached To column and select the number from the **Modem is connected to Com Port** Box.

**Modem Supports Caller ID** – You need a special modem to use this feature. If set, incoming calls can be monitored while away from the office.

### ***Printing***

**Print in Color** – If you opt for color, you can select 2 colors, one for borders and one for text.

**Milestones** – Create a list of events (milestones) which must be scheduled, tracked, assigned and completed for a construction project. Create the list in the order in which they would occur for a project. Include all events for the most complex projects you wish to schedule. When actually creating a project, unneeded events can be deleted, leaving just those needed for a less complex project.

Include events which will be performed by construction personnel or teams, administrative personnel or sub-contractors.

Milestones should be events which occur after it is certain a contract or proposal has been reached.

Review the list carefully before continuing on to the **Attributes** Section.

If a milestone list exists, the Toggle Grid button and menu selection will be enabled. All existing milestone and their attributes will be displayed in grid form.

**Attributes** – each milestone has a list of attributes. Milestones are presented on the Attributes Screen in the order in which they were created.

Attributes further define each milestone and set conditions for the project when scheduling.

- **Performed by** – is this milestone administrative or technical?

If administrative, the milestone is simply scheduled as a task to a “*to do list*” on a selected date for administrative staff. An example might be “Obtain Building Permit” as the milestone. You might assign a number of these events to occur on the same day.

If Performed by Technical Personnel, the milestone will require a date, start time and duration in hours or days when being scheduled.

Each team has a unique schedule allowing the same time slot can be scheduled to different work teams.

- **Accomplished when** - when is this milestone performed; before, during or after construction. This helps control the flow of the project. This is also used to estimate the total days for completion of the project.
- **Dependency** – must some previous milestone be completed before this milestone commences?  
A list of all previous milestones is presented in the list window. If this milestone requires the completion of a previous milestone, select it from the list. The Interval Window opens. Select the number of days from the completion of the Dependency Milestone until when this milestone can be scheduled. For example, you might pour a foundation and wait four days before constructing walls etc.

When all data is to your satisfaction, Click Save **Changes / Return to the Menu** button.

## Using Citrus Construction Scheduler

Once the basic files, milestones and attributes have been created, the program is ready for use. You might want to create your Holidays and Vacations file prior to scheduling any projects. This prevents work scheduling on days when employees will be absent due to Holidays and vacations.

The sub-routine menu window presents all of the routines from which you can select.

- **Create a New Project** – when selected, the project creation window opens.

Start by selecting a customer account. There are two ways to select a customer; from an existing Proposal created with Citrus Proposal or from your customer list. If you have not created any customer records, see **Creating Customer Accounts** later in this document.

If selecting from a Proposal, both the Account Billing Info and the Job Site Location data will be entered automatically. If selecting from your Customer List, only the Account Billing Info will populate.

The toggle button below the Job Site Location data can be used to clear or automatically load the Job Site Location data.

If the customer data was selected from a proposal, the Proposal Number will be displayed above the Project Number. The Project Number is generated by the program. The project number format is, PJ, followed by the Julian Date, and then a number. The number is the next project to be created this date, starting at 1 and incrementing each time a project is scheduled. The number resets to 1 with the next Julian Date (tomorrow).

Select or enter a name for the project. (Keep it brief).

The milestone list box will contain all milestones created during the setup process.

Untick any milestone you do not wish to have as part of the project you are creating.

When satisfied, click the *Continue* button.

The Schedule Milestones Window will open. Milestones are presented sequentially. The Next Milestone will display in the Milestone Box. If it has a dependency, the Dependency Box will display.

### **Schedule a Technical Milestone**

Assign the milestone to a team by selecting a team from the dropdown list.

The calendar will display the 1<sup>st</sup> available date for the milestone and the selected team. You may select a different team or date if desired.

Select Time Duration for the milestone in hours or days.

Select a Work Location; in your shop or office or on-site.

Click the *Continue* Button.

If the Time Duration is in hours, the Time Schedule for the selected date will display.

All existing events for the day will populate the grid. All available hours will say “No Event Scheduled”.

Click a Starting Hour. If ample consecutive Hours remain, the project number and milestone name will fill all required hours.

If the Time duration is Days, the program will search for the next available consecutive dates to which the event can be scheduled.

Click the *Continue* Button.

## Schedule an Administrative Milestone

The calendar will display the 1<sup>st</sup> available date for the milestone. You may select a different date if desired.

Click the *Continue* Button.

**HINT:** The menu selection in the upper left, Windows, displays the current months daily hours already scheduled.

Continue until all milestones have been scheduled.

The Milestone Summary Screen will display.

Click **Schedule** if the project schedule is to your satisfaction.

The project will be saved.

Click **Menu** to DELETE the project and return to the menu.

All milestones will be erased.

- **Manage Existing Projects** – Projects are presented in a grid.  
Click on a project in the grid to select it, and then Right Click to display options.
  - View Project Details* – displays the account data, Project Data and Milestone data.  
You manage Milestones here.  
Click on a milestone to select it then right click to display options.
    - View* – The Milestone Summary Screen displays, showing all aspects of the milestone.
    - Reschedule* – The milestone calendar opens. Select a new date and/or time for the milestone. All subsequent milestones will be rescheduled based upon milestone dependencies.
    - Complete* – The milestone will marked as completed on the date selected on the calendar.
  - Complete Project* – All Milestones are marked as completed. All scheduled events are completed and the time resources are released. You can print a Project Summary Report if desired. If you have installed Citrus Invoicer Program, you can print a partial Invoice record for completion and printing at a later time. The project is not deleted at this time. Use the Delete Project routine below.
  - Print Project Summary* -You can print a Project Summary Report if desired.
  - Delete Project* - Deletes all records of the project.
  - Call Account*- Displays the Phone Dialer screen and loads the customer phone number for dialing.
- **Create a Work Order** – a Work Order is a document for your personnel. It is not a Proposal or customer document.  
Select a customer.  
Enter data pertaining to the work you need performed. Select or enter a Header.  
You can add Inventoried and Service Items to the Work Order. Your personnel will enter the quantities used.  
Tick the “Print a Completion Summary Report” if you wish one printed along with the Work Order. A Summary Report details what was actually accomplished.
- **Print/View Work Schedules** – You can print and View Team Work Schedules.
- **Print/View Administrative Events** – You can print and View Administrative Work Schedules by date range.
- **Schedule Holidays/Vacations** – Create a list of Days where a Holiday, Vacation, or Sick Day occurs and work scheduling should not.
- **Unattended Call Monitoring** - Requires a special modem and Caller ID service from your local telephone company. Simply set to “On” and all calls received while away will be monitored. You can auto-redial calls received. (This is not all answering).

## Creating Customer Accounts

NOTE: Customer records are stored in a file named CustomerData.txt. It is a **structured text file**, which means each element within the record has a fixed length. You can view it using any Text Editor such as Notepad, **but do not alter the contents**.

**Modify Customer records only while viewing the Customer Record with the customer screen of any Citrusware program.**

### **Creating customer records**

To create a new customer, click *Files* then *Add a New Customer*. The Data fields will be cleared. If you change your mind, click *Cancel Add* and the Add routine will be exited.

A customer is either a Business or an Individual. Select the customer type 1<sup>st</sup> when creating a new customer.

Business customers have one name field, while individual customers have a title, first name, middle initial and a last name.

Customers appear in the order in which they were created.

**General Information** – Enter the general information about your customers. The City Box is a “Drop Down” box containing a list of cities that is updated as you create accounts. Click the button to see more cities from which to select, or type in a new city. If you do not enter an account number, then the account telephone number will be used by default.

### **Modifying a customer record**

Simply type over the data you wish to modify. Taking any action after making changes will save the customer record.

### **Deleting a customer record**

To delete the current customer, click the **Files Menu** then **Delete this Customer**. Click **Yes** to confirm the deletion and the customer record will be removed from the Customer File.

### **Finding customers**

At the bottom of the General Information Section is a series of buttons used to navigate through your Customer Account Records.

### **Navigating**

- << returns to the first customer record
- < steps back one Customer from the current record
- > steps ahead one Customer from the current record
- >> steps to the last Customer in the file

You can “**Search**” for a Customer by clicking the “Search by Criteria” Button. The “Customer Search Screen” is displayed. Select a *Search Criteria* example - Street Address. Enter *Search Data* example – Main St  
Click Search

All customer records containing the *Search Data* in the *Search Criteria* field will be displayed in the *Customers Found grid*.

You broaden your search by decreasing the search data.

*Main* will produce Main St, W Main St, Main Ave, Mainland St, etc  
You lessen your search by increasing the search data.  
*123 Main St* will produce only 123 Main St

**Note** the difference between *by Last Name* and *by Business Name*.  
*Last Name* finds individuals, *Business Name* finds businesses.

Searching is not case sensitive, in other words, if you enter *Smith*, all customer records with Smith or smith in the name field will be found (including Blacksmith, Smithson, etc).

Once you have selected the “Search Criteria” and entered the search data, click **Search**.

Click on the customer that you wish to select and the customer record will be loaded to the customer screen.

If only one customer record meets the search criteria, it loads automatically.

If no record is found, you can create a new record at this time.

You can “**Select**” a customer by clicking “the From Name List” button.

Clicking “from Name List” displays a dropdown list on top of the Customer Name box.

This list contains all of your customers and is alphabetically sorted.

You can click the arrow on the right side and the list drops down to display all of your customers.

You can scroll through the list to find a customer and click on it to load it.

You can also start typing customer information into the top portion of the list and the next customer that contains what you have typed will be loaded. Continue to type until the correct customer loads.

Press the <TAB> key to hide the list and load the customer.

The “From Name List” button is a toggle button. Clicking it again will hide the Customer Select List.

### **Customer Auxiliary Data**

The Toggle Aux Screen Button displays the Auxiliary Data screen where you can store unique data about each customer account. There are 6 data boxes with Headings.

The Headings apply to ALL customer accounts. (In other words, if you set Heading #1 to “Date Installed”, that’s the Heading #1 for all accounts).

The data, however, can differ for each account.

Once you decide what each data box will contain, delete the Default Heading and type a new heading. Click the Save Headings button when all new headings are entered.

As you select or create new accounts, you can enter Auxiliary Data.

The Clear buttons clear the data box to the left for the current account.