



Start Processing  
Useful Data

## CUSTOMER SET UP TRAINING

ISSUE REFERENCE:

SC DCI-0001

Doc. No. SNTR-04

Issue No: 01

Issue Date: 01.06.19

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#### Customer Setup

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##### Second Level Cost Codes:

Code	Name	
LAB1	Groundworks	
LAB2	Plant Operative	
LAB3	Trades	
LAB4	Engineering	
LAB5	Site Management	
LAB6	Lifting	

##### Third Level Cost Codes - LAB1:

Code	Name	
LAB1-3	Kerb Layer	
LAB1-1	Groundworker	
LAB1-2	Pipelayer	

- [Trades and Labour:](#)

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This is where you create the trades that work within your business, add the Trade e.g. Engineer and then the next level is the breakdown of types within that trade e.g. Design, Reinforcement, As Build, Setting Out etc.

You will now have the ability to set a trade and skill set against your employees in their profile, the skill set you select is what this employee's costs will show as in the Project Costings. The cost codes that are set against the employee will then be incorporated into the Labour report and costings for the project.

- **Materials:**

Here you will add the cost codes for your materials, First Level will always be materials, so second level could be timber and third level could be plywood, timber length, fillet etc.

You will use these cost codes to allocate costs against your projects and monitor through spend in your materials.

- **Plant:**

As with the materials you will allocate cost codes against your items of plant hire so that you can monitor spend on your projects.

- **Training:**

This area needs to be populated so your employees can add their training. You need to set the type of training you expect your employees to have, so you will have the same title for your training instead of one user entering CSCS Card and another entering Health and Safety Card. This helps you to filter your training in the training matrix to easily find the training type you're looking for.

- **Customer Details:**

In this area you can set the company address, set the main emails for notifications on commercial (CVI/RFI), Health and Safety and accounts. You can also set the Buyers so they will receive notification on the orders placed. This area is used to restrict the GDPR and wages information. In the "sensitive information set up" click enable, select the email address that will be responsible for allowing users to see wages and GDPR sensitive information. Then create a password, this password can only be changed by SPUD staff and will only be reset with written authorisation from a senior manager. A audit trail will show all users that have ever had access to this information.