



## CLIENT PORTAL USER GUIDE

Version 1.10



# DOCUMENT CONTROL

## Document

Alpha Tracker Client Portal User Guide
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## Current Version

Version	Date	Issued Pages	Reason For Issue
1.10	Apr 2024	All	Logo updated

## Previous Versions

Version	Date	Issued Pages	Reason For Issue
1.9	Apr 2022	All	Detail on pre-set filters.
1.8	Dec 2021	All	Additional shortcut buttons. Submitting bulk samples. Hotspotted drawings. Folders on enquiries. New data flag. Signing in.
1.7	July 2018	All	Logging enquiries, web security, contractors
1.6	Nov 2017	All	Active Directory users
1.5	Dec 2016	All	Uploading site plans
1.4	Nov 2016	All	Changed plan images
1.3	June 2016	All	Updates to Site List & Compliance Summary, new Removed Register and details on recording removal or remediation
1.2	July 2015	All	Updates to Site List, new Remediation Register, Archived Report List, Contact Details and Bulk Samples
1.1	April 2015	All	Various minor updates, including removing Site Grid section
1.0	Aug 2014	All	First issue

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# CONTENTS

<b>1.</b>	<b>INTRODUCTION .....</b>	<b>6</b>
<b>2.</b>	<b>GETTING STARTED .....</b>	<b>7</b>
2.1	Signing in to the Client Portal .....	7
2.2	Using the menu on the Client Portal .....	10
2.3	Signing out of the Client Portal .....	11
<b>3.</b>	<b>DISPLAYING YOUR DATA.....</b>	<b>12</b>
3.1	Displaying the project pipeline.....	12
3.2	Exploring the Sites section .....	13
3.2.1	The Site List and Compliance Summary .....	14
3.2.2	The Site Grid .....	17
3.2.3	The Site Map .....	18
3.3	Exploring the Registers section .....	19
3.4	Exploring the Photo Registers section.....	21
3.5	Exploring the Reports/Jobs section .....	22
3.5.1	Viewing hotspot drawings on the Portal.....	25
3.5.2	Viewing CAD drawings on the Portal.....	27
<b>4.</b>	<b>RUNNING REPORTS ON YOUR DATA .....</b>	<b>28</b>
4.1	Running data extracts.....	28
<b>5.</b>	<b>UPLOADING DOCUMENTS .....</b>	<b>29</b>
5.1	Uploading site-related documents.....	29
5.2	Uploading project-related documents .....	30
5.3	Maintaining a library of other documents .....	31
<b>6.</b>	<b>MAINTAINING CONTACT &amp; USER DETAILS.....</b>	<b>34</b>
6.1	Updating your contact details .....	34
6.2	Creating additional users.....	35
<b>7.</b>	<b>UPLOADING BULK SAMPLES .....</b>	<b>36</b>
7.1	Reviewing samples .....	36
7.2	Entering new samples .....	37
7.3	Uploading new samples .....	38
<b>8.</b>	<b>RECORDING REMOVAL/ REMEDIATION DETAILS .....</b>	<b>40</b>

**9. MAINTAINING CONTRACTORS ..... 42**

9.1 Displaying contractors ..... 42

9.2 Adding a new contractor ..... 43

9.3 Changing a contractor’s status ..... 45

**10. LOGGING ENQUIRIES ..... 47**

10.1 Logging an enquiry ..... 47

10.2 Displaying your enquiries and quotation ..... 49

10.3 Accepting or rejecting a quotation ..... 49

# 1. INTRODUCTION

The Alpha Tracker Client Portal provides direct access to your Alpha Tracker-produced reports, documents, project and other data live over the Internet. It has an easy-to-use interface that lets you drill down to the required information quickly and easily.

The aim of this User Guide is to help you access your online data and work with it as required. It includes information on the following:

- signing in and out
- accessing data on the Alpha Tracker Client Portal
- exploring the Sites section
- exploring the Registers section
- exploring the Photo Registers section
- exploring the Reports/Jobs section
- running data extracts
- maintaining a library of other documents
- updating contact details
- uploading bulk sample details
- recording removal or remediation details.



*Please note that some of these options may not be available on your Client Portal.*

## 2. GETTING STARTED

This section describes how to:

- sign in to the Alpha Tracker Client Portal
- use the menu
- sign out of the Client Portal.

### 2.1 Signing in to the Client Portal

The surveying company will provide you with sign-in details to view your data in Alpha Tracker. Space is provided below for you to record these details for safekeeping:

Address: \_\_\_\_\_

User ID: \_\_\_\_\_

Password: \_\_\_\_\_



*Note that if you are an Active Directory user, then you do not need a separate username and password to sign into Alpha Tracker and do not see the Sign In screen.*

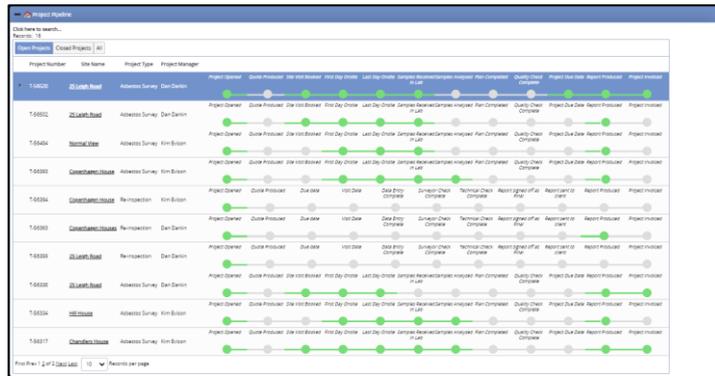
To sign into the Client Portal:

1. Open your Browser.
2. Type the URL or web address of your asbestos surveying company's Alpha Tracker in the address line of the Browser and press **Enter** to display the Sign In screen.



3. Type your user ID and password in the boxes and click the **Sign in** button.  
If you forget your sign-in details, contact your system administrator to reset them.  
The Home screen is displayed, which may show some or all of the following:

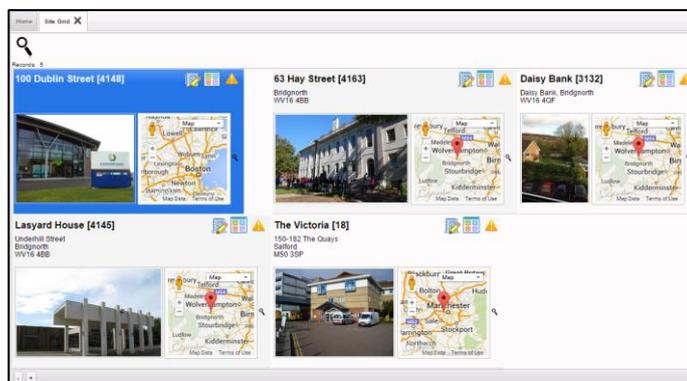
- “Project Pipeline” shows completed and uncompleted milestones for projects marked as Show On Web, to indicate progress through the main phases of work:



- “Site List & Compliance Summary” lists your sites and also shows summary compliance data:

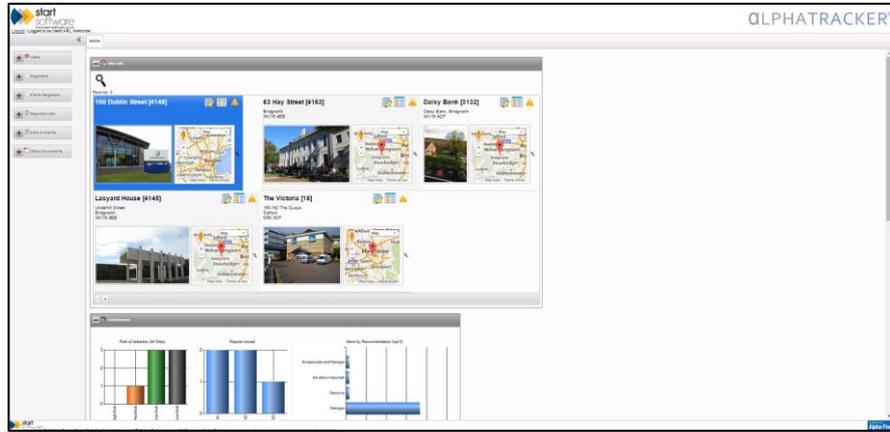
Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode	
The Victoria	16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP	[Icons]
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4QF	[Icons]
100 Dublin Street	16/09/2015	15/09/2015		Edinburgh	EH1 3PX	[Icons]
63 Hay Street	16/02/2015	16/02/2015		Haye-on-Wye	HR3 5AA	[Icons]
25 Ivor Road	19/10/2015	19/10/2015		Cirfe Mullen Wimborne Dorset	BH21 3QF	[Icons]
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 1BP	[Icons]
Innovation Centre	28/10/2015	28/10/2015				[Icons]
Squirrel Trees	04/12/2015	04/12/2015		Browsea Island		[Icons]
Lasyard House	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 4BB	[Icons]

- “Site Grid” shows site information in a grid pattern:



- “Dashboards” show the following information in graphical format:
  - risk of asbestos (all sites) – the number of items at high, medium and low risk across all your sites

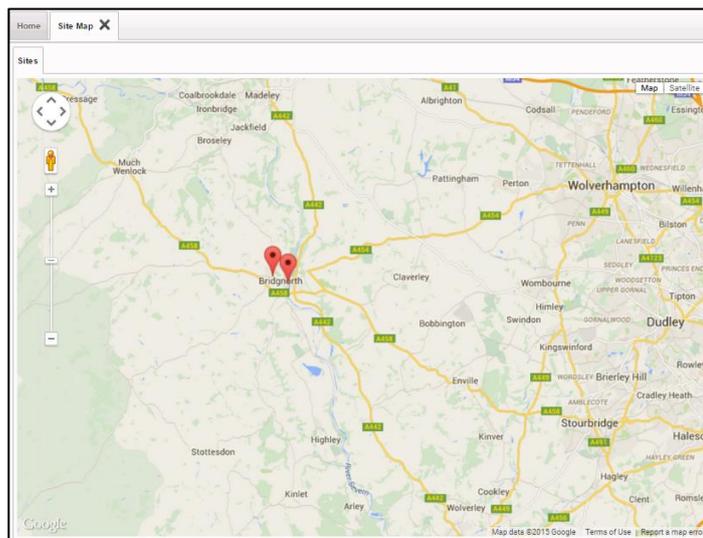
- reports issued – the number of reports issued and the month they were issued
- items by recommendation – the proportion of items with each different recommendation.



- “Report List” shows a list of all the reports that have been produced across all your sites:

Site Name	Project Number	PO	Site Address	Post Code	Site Reference (UPRN)	Project Type	Report Produced	Invoiced
100 Dudley Street	N-00510		100 Dudley Street Edgborough	B15 3PX		Asbestos Survey	12/01/2015	
Daisy Bank	T-00294		Daisy Bank, Bridgnorth	WV16 4QF		Asbestos Survey	12/02/2015	
63 Hay Street	X-00005		63 Hay Street Haye-on-Wye	HR3 5AA		Asbestos Survey	16/02/2015	
Layard House	X-00004		Underhill Street Bridgnorth	WV16 4BB	ARL123	Asbestos Survey	16/02/2015	

- “Site Map” displays your sites on a map:



These items are also accessible from menu options and their usage is described below with reference to the menu options.

## 2.2 Using the menu on the Client Portal

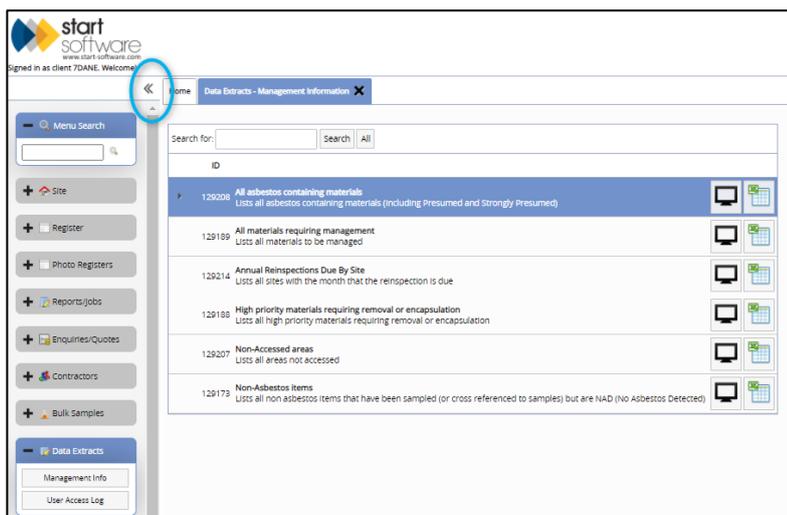
Menu items on the left-hand side of the screen give you access to different areas of the Alpha Tracker Client Portal. Where a menu item displays a plus symbol, you can click on it to expand the item and show its menu options. For example:



The menu item now displays a minus symbol. Clicking on it again shrinks the item back to hide the options.

There is also a Menu Search at the top of the menu to help you quickly find any menu option. Type a word into the box and click the magnifying glass to search for matching menu options.

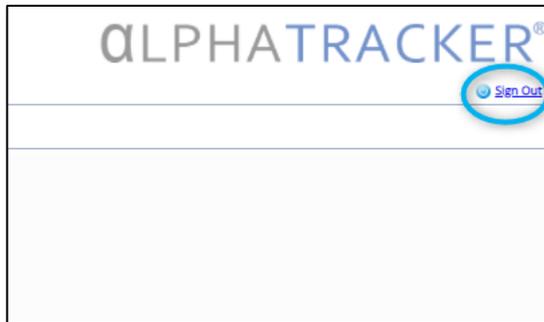
Select a menu option by clicking it. The appropriate screen opens as a tab in the central area of your screen. You can have many tabs open at once and can switch between them by clicking the tab name. Close a tab when you have finished with it by clicking the X next to its tab name.



If you are working on a small screen you may find it useful to shrink the menu by clicking the double left arrow symbol indicated above.

## 2.3 Signing out of the Client Portal

To sign out of the Client Portal, simply click the **Sign Out** link displayed in the top right-hand corner of the screen.



You return to the Sign In screen.



*Note that Active Directory users do not see the Sign In screen.*



### 3.2 Exploring the Sites section

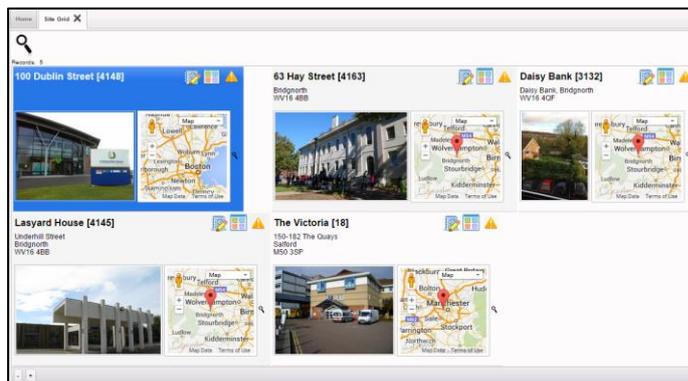
Site-related information shows you the current position for that site, taking into account all projects that have been undertaken at that site.

Options in the Sites section of the menu on the Client Portal let you view your sites as a list or as a grid. You may also have sites displayed as points on a map on the Home tab. You can choose whichever view suits you best. For example:

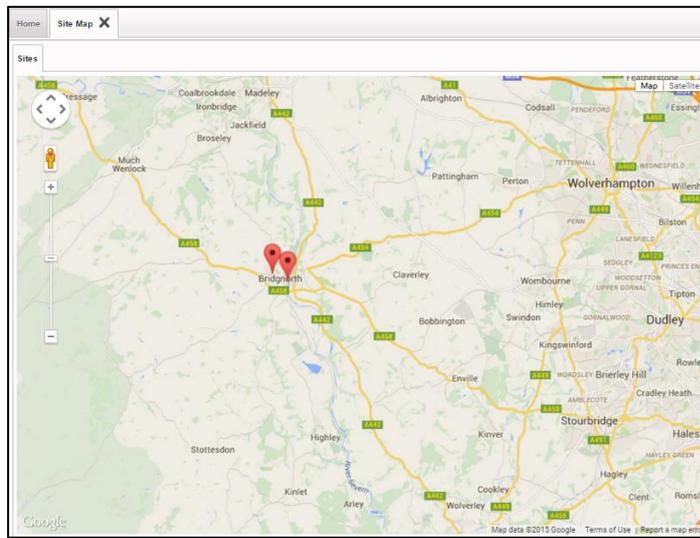
- “Site List” lists your sites and also shows summary compliance data:

Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode
The Victoria	16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4QF
100 Dublin Street	16/09/2015	16/09/2015		Edinburgh	EH1 3PX
63 Hay Street	16/02/2015	16/02/2015		Haye-on-Wye	HR3 5AA
25 Ivor Road	19/10/2015	19/10/2015		Cofe Mullen Winsome Dorset	BH21 3QF
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 1BP
Innovation Centre	28/10/2015	28/10/2015			
Squirrel Trees	04/12/2015	04/12/2015		Brownsea Island	
Lasyard House	16/02/2015	16/02/2015	ARL123	Undermill Street Bridgnorth	WV16 4BB

- “Site Grid” shows site information in a grid pattern:



- The “Site Map” (on the Home tab) displays your sites on a map:



### 3.2.1 The Site List and Compliance Summary

The Site List and Compliance Summary displays all your sites and gives an indication of activity at the sites.

1. Display the Site List and Compliance Summary by selecting the “Site List” option from the Sites menu, or see it on the Home tab.

Site Name	Last Activity	Last Inspection	Site Reference (UPRN)	Site Address	Postcode	
The Victoria	16/02/2015	16/02/2015		150-182 The Quays Salford	M50 3SP	[Icons]
Daisy Bank	12/02/2015	12/02/2015		Daisy Bank, Bridgnorth	WV16 4DF	[Icons]
100 Dublin Street	18/09/2015	18/09/2015		Edinburgh	EH1 3PX	[Icons]
63 Hay Street	16/02/2015	16/02/2015		Haye-on-Wye	HR3 5AA	[Icons]
25 Ivor Road	19/10/2015	19/10/2015		Coffe Mullen Wincome Dorset	BH21 3QF	[Icons]
12 The Green	01/01/1900	01/01/1900		Worcester	WR1 1BP	[Icons]
Innovation Centre	28/10/2015	28/10/2015				[Icons]
Squirrel Trees	04/12/2015	04/12/2015		Brownsea Island		[Icons]
Lasyard House	16/02/2015	16/02/2015	ARL123	Underhill Street Bridgnorth	WV16 4BB	[Icons]

The Site List & Compliance Summary includes Sites which have had no activity. The **Last Activity** column shows the date for the last project marked as “Show On Web” (not including pending projects). The **Last Inspection** column shows the date of the last survey or re-inspection. This list is colour-coded to give you an instant impression of status:

- Green indicates activity within the last 9 months.

- Yellow indicates activity due, where the last activity was between 9 and 12 months.
- Red indicates overdue activity, ie last activity was more than 12 months ago.
- There is no colour if there are no ACMs at the site.

Other columns may also be displayed, some of which are colour-coded in the same way.

Next to the **Postcode** is a magnifying glass icon from which you can display a map of the Site. After the **Postcode**, the contact details are displayed. The Register, Summary, Reports and Documents Folder buttons are also available. There may also be a Client Notes button.

2. Use the buttons to access the following information:

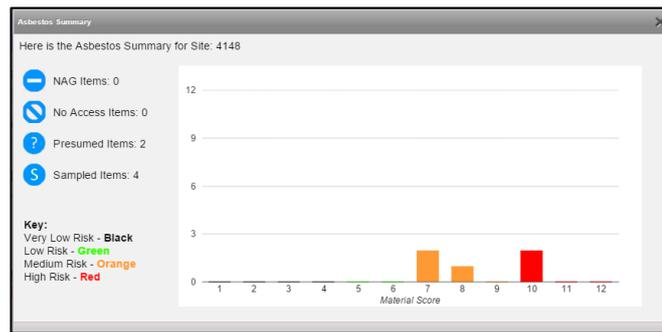


– shows the up-to-date Asbestos Register for the site:

Site Name	Building Name	Floor	Location	Location Description	Material	Item	Sample Number	Identification	Project Number	Approach	Sample Number	Expiry (in M)	Identification	Material Score	Priority	Total	Recommended Action	
100 Dublin Street	100 Dublin Street	0	001	Plasterboard	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	001	Plasterboard	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	001	Plasterboard	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	002	Stairs	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	002	Stairs	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	002	Stairs	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	004	Lifts	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0
100 Dublin Street	100 Dublin Street	0	003	Waters	Other	Handing Board	N400010			0	0	0	0	0	0	0	0	0



– displays an Asbestos Summary for the site, showing the number of items present for each material score and an indicator of the risk level. The risk results are colour-coded for clarity, with a key in the bottom left corner:

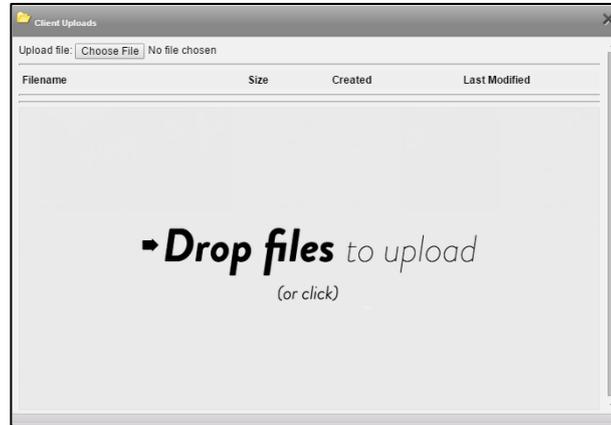


– gives access to the reports produced for the site, with a separate row displayed for each report:

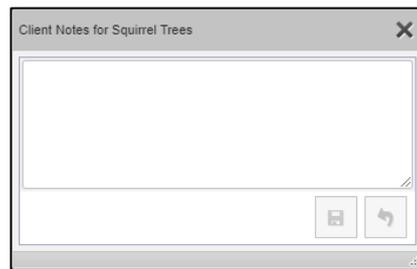
Site Name	Project Number	PO	Site Address	Post Code	Site Reference (EPRN)	Report Produced	Involved
100 Dublin Street	N400010		100 Dublin Street Edinburgh	EH1 3PX	Asbestos Survey Example Management	16/09/2015	



– allows you to access the Client Upload folder where you can store files that are relevant to the site:



– lets you type free-text notes related to a site.



3. Use the filter buttons above the list to filter the display with one click. Sites without ACMs will not show under the Activity Due and Overdue filter buttons.
  - OK – the next inspection date is more than three months away (ie green sites).
  - Activity Due – the next inspection date is less than three months away and the site contains asbestos (ie yellow sites).
  - Overdue – the next inspection date is in the past and the site contains asbestos (ie red sites).
  - Some Activity – the site has had a report completed.
  - No Activity – the site has not had a report completed.

If it is switched on in your Client Portal, there may be a new data flag displayed to draw your attention to updates to data. The new data flag can be seen on the left of the site name on the Site List & Compliance Summary and on the left of the items on the registers, for example:

Site Name	Last Activity	Last Inspection	Last Survey Issued	Last Survey Site Date	Last Re-inspection Issued
The Birches	29/04/2021	29/04/2021	29/04/2021	29/04/2021	
The Firs	09/03/2017	09/03/2017	09/03/2017	03/03/2017	
The Oaks	12/12/2016	12/12/2016	12/12/2016	01/12/2016	

If you want to see all the new data and only the new data on a register, you can filter the records on the register by using the New Data pre-set search button.

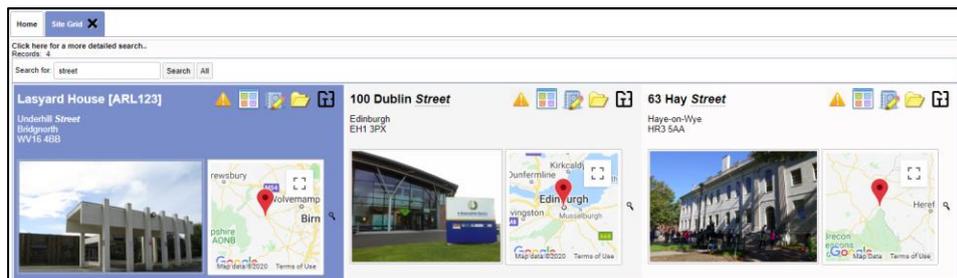
### 3.2.2 The Site Grid

From the Site Grid you can see almost the same information as on the Site List –the layout and the buttons however are slightly different.

The Site Grid displays summary data related to your sites and allows you to:

- see the front page photo of the report
- see a location map of the site
- display the Asbestos Register for the site
- display an Asbestos Summary for the site
- access the Reports List for the site
- access the Client Uploads folder for the site
- display the Site Plans for the site.

1. Display the Site Grid by selecting the “Site Grid” option from the Sites menu.



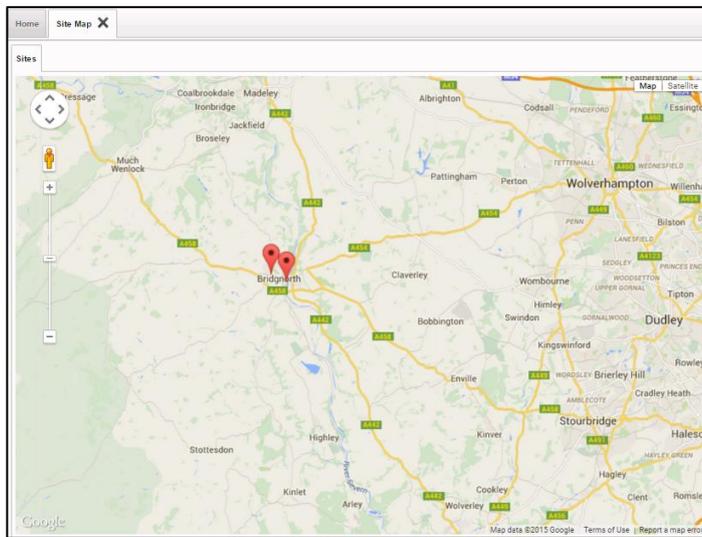
Multiple properties are displayed in the Site Grid. The front page photo and location map are both prominently displayed in the grid layout.

2. Use the Register, Summary, Reports, Documents Folder and Site Plans buttons to display information about the site.

### 3.2.3 The Site Map

The Site Map on the Home tab displays the location of all your sites as points on a map. You can manipulate the map in the usual ways:

- zoom in and out of the map by using the wheel on your mouse or the plus and minus buttons on the map
- pan left/right/up/down by clicking and dragging the map or using the pan controls in the circle in the top left-hand corner of the map
- drag the person icon onto the map to use Streetview.



### 3.3 Exploring the Registers section

The Registers section of the Client Portal lets you explore four registers:

- Asbestos Register – all positive asbestos items across all your sites
- Non Asbestos Register – all negative surveyed items across all your sites
- No Access Register – all areas not accessed across all your sites
- Removed Register – all items that have been removed across all your sites
- Remediation Register – all items that have had remedial work undertaken across all your sites.

You can filter any of the registers by site so that you can see the register of your choice for a selected site only.

1. Display the required register by selecting the “Asbestos Register”, “Non Asbestos Register”, “No Access Register”, “Removed Register” or “Remediation Register” option from the Registers menu.

The layout is the same for the first three registers, with the Removed and Remediation Registers showing additional removal or remediation details. The differences in the first three registers are the items selected to display in the register.

Photo	Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach	Sample Number	Extent	UoM	Identification	Material Score	Priority	Total	Recommended Action	ID
	63 Hay Street	63 Hay Street	0	011	Exploration Office	<input checked="" type="checkbox"/>		X-00005							0	0			29547
	Access was not possible because the room was locked and a key was not available.																		
	63 Hay Street	63 Hay Street	0	010	reception	<input checked="" type="checkbox"/>		X-00005							0	0			29348
	Access was not possible because the room was locked and a key was not available.																		
	63 Hay Street	63 Hay Street	0	008	Board Room	<input checked="" type="checkbox"/>		X-00005							0	0			29349
	Access was not possible because the room was locked and a key was not available.																		
	The Victoria	63 Hay Street	0	011	Exploration Office	<input checked="" type="checkbox"/>		X-00011							0	0			29425
	Access was not possible because the room was locked and a key was not available.																		
	The Victoria	63 Hay Street	0	010	reception	<input checked="" type="checkbox"/>		X-00011							0	0			29426
	Access was not possible because the room was locked and a key was not available.																		
	The Victoria	63 Hay Street	0	008	Board Room	<input checked="" type="checkbox"/>		X-00011							0	0			29427
	Access was not possible because the room was locked and a key was not available.																		
	Layyard House		1	002	Kitchen	<input checked="" type="checkbox"/>		X-00004					no		8	8			31615
	Daisy Bank	Daisy Bank	1	003	Utility Room	<input checked="" type="checkbox"/>		T-00294							0	0			33867
	Access was not possible because the room was locked and a key was not available.																		

2. Use the search fields at the top of the register to search and filter the list as required. You might, for example, want to list only the Chrysotile asbestos items in a specific building.

There are also filter buttons, such as **Sampled Items** and **Presumed Items**, that let you apply pre-configured filters.

Use the navigation controls at the bottom of the page to display subsequent pages of data.

3. You can also sort the data displayed in a Register by clicking on the column headings. For example, clicking once on the Location Description column heading sorts the data A-Z by the room description – clicking a second time reverses the order, Z-A.

- 4. If required, you can export the data displayed on a Register to Excel™ by clicking the **Export to Excel** button at the bottom of the screen:



The data is downloaded to your PC as an \*.xls file for you to use as you wish.

Or you can click the **Print/PDF** button at the bottom of the screen to display a pre-formatted pdf of the Site Register Print. Hover on the pdf screen to display controls that let you download or directly print the register.

BUILDING	FLOOR	LOCATION	ITEM	MATERIAL	REF	NO. OF SHEETS	UNIT IDENTIFICATION	MAT	PRE	TOT	REACTION	
Daisy Bank	1	001 Bathroom 2	Ceiling	Gypsum Wall Insulating Board	T-00294 P	10	m <sup>2</sup>	0	0	0		33961
Daisy Bank	0	001 Hall			T-00294			0	0	0		33962
Daisy Bank	0	001 Hall	Ceiling	Plaster Board	T-00294			0	0	0		33963
Daisy Bank	0	001 Hall	Window Sill/Trimmer		T-00294			0	0	0		33964
Daisy Bank	1	006 Bathroom 2	Floor	Vinyl Products	T-00294 X	1	5 m <sup>2</sup> Chrysotile	3	0	3		33965

## 3.4 Exploring the Photo Registers section

The Photo Registers section of the Client Portal lets you view the photos and related item details in three registers:

- Asbestos Register – all positive asbestos items across all your sites
  - Non Asbestos Register – all negative surveyed items across all your sites
  - No Access Register – all areas not accessed across all your sites.
1. Display the required photo register by selecting the “Asbestos Register”, “Non Asbestos Register” or “No Access Register” option from the Photo Registers menu.

The layout is the same, whichever register you select. The difference is in the items selected to display in the register. The photo for the item is displayed on the left-hand side and the item details are displayed on the right.

Home Photo - Asbestos Register X Photo - Non Asbestos Register X Photo - No Access Register X

Search

Site Name Building Name Floor Location Item Sample Number Identification

Clear Search Criteria Search

Records: 8

Site Name Building Name Floor Location Location Description Item Material Approach Sample Number Extent Uo M Identification Material Score Priority Total

Site Name Building Name Floor Location Location Description Item Material Approach Sample Number Extent Uo M Identification Material Score Priority Total

2. Use the search fields at the top of the register to search and filter the list as required. You might, for example, want to see only the photos relating to a specific floor of one building.

If no photo was taken for an item, as is often the case for non-suspect items, the item details are still displayed but you will see white space in place of a photo.

## 3.5 Exploring the Reports/Jobs section

The Reports/Jobs section of the Client Portal provides an overview of the reports that have been produced for you on Alpha Tracker. You can select an option to view:

- “Report Grid” – to see all the reports that have been produced across all your sites in a grid, with front page photos and location maps prominently displayed.



This display is similar to the Site Grid. Refer to Section 3.1.1, The Site Grid, for details on accessing information from a grid display.

- “Report List” – to see a list of all the reports that have been produced across all your sites
- “This Month” – to view a list of only those reports that have been produced during the current month
- “Pending” – to display a list of jobs that are currently in progress, where the report is not yet available
- “Archived Report List” – to display a list of reports that have been marked as archived, for example for properties that are no longer in your portfolio. Any projects marked as archived no longer show in the Report List or Site List, but they can be seen under this “Archived Report List” menu option.

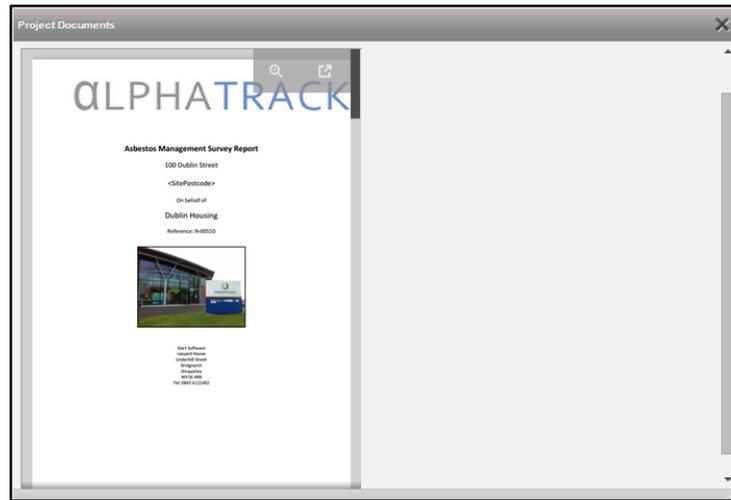
1. Display the list of reports by selecting either the “Report List”, “This Month”, “Pending” or “Archived Report List” option from the Reports/Jobs menu.

Site Name	Project Number	PO	Site Address	Post Code	Site Reference (UPRN)	Project Type	Report Produced	Invoiced
100 Dublin Street	N-00510		100 Dublin Street Edgbrough	EH1 3PX		Asbestos Survey	12/01/2015	
Daisy Bank	T-00204		Daisy Bank, Bridgnorth	WV16 4DF		Asbestos Survey	12/02/2015	
63 Hay Street	X-00005		63 Hay Street Haye-on-Wye	HR3 5AA		Asbestos Survey	16/02/2015	
Lazyard House	X-00004		Undermill Street Bridgnorth	WV16 4BB	ARL123	Asbestos Survey	16/02/2015	

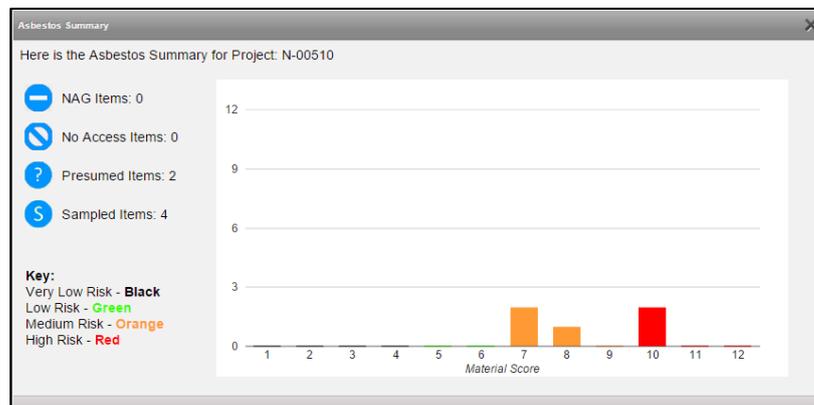
The layout of the screen is the same, whether you select the “Report List”, “This Month”, “Pending” or “Archived Report List” option. The difference is in the jobs selected to display on the list. It enables you to:

- see the front page photo of the report
  - access a PDF of the report, with the number of PDFs available displayed in brackets
  - display an asbestos summary for the survey
  - display the asbestos register from the survey, with the number of Asbestos Containing Materials (ACMs) in the survey displayed in brackets
  - access any documents you have uploaded related to the site
  - display site plans, with the number of files available displayed in brackets.
2. Use the search field to filter the list by searching across the site name, project number, site address, postcode, site reference (UPRN or equivalent) and project type. For example, typing “re-insp” in the search field will find all those projects that have a project type of “Re-inspection”.

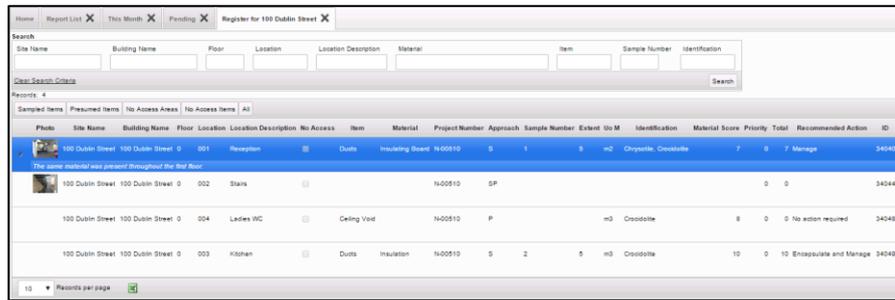
3. Click the **PDFs, Summary, Register, Documents** or **Plans** button to display the required information.
  - **PDFs** – gives access to the PDF of the report produced. There is a link to download the document. Holding down the Ctrl key and clicking on the link opens the document in a separate tab. Controls in the top right-hand corner of the screen let you zoom in or out, or view the document full-screen in a separate tab from where you can also download and print the PDF.



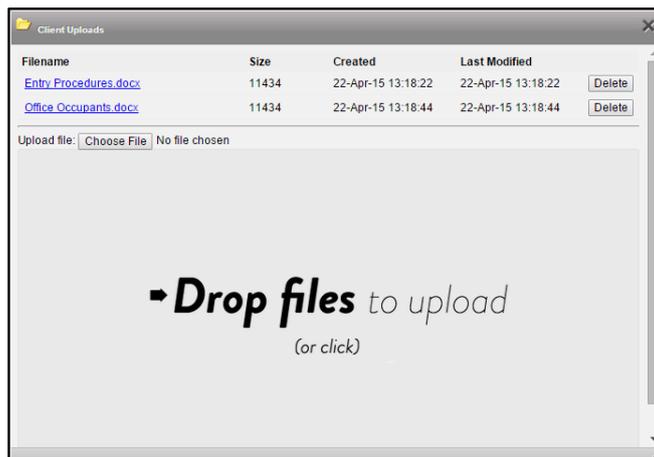
- **Summary** – displays an Asbestos Summary from the survey data showing the number of items present for each material score and an indicator of the risk level as identified at that survey. The risk results are colour-coded for clarity, with a key in the bottom left corner.



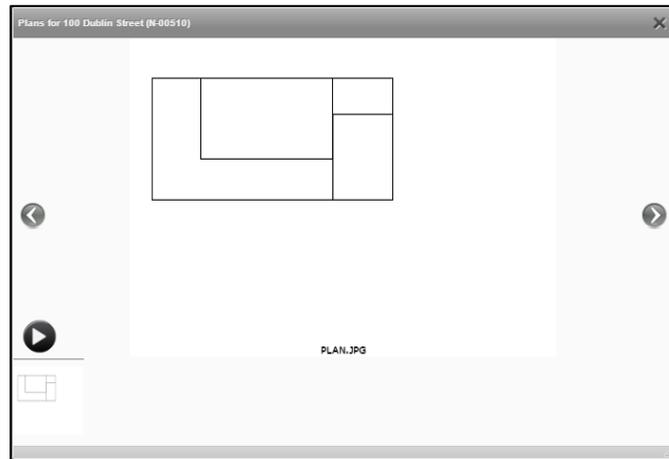
- **Register** – shows the survey data for the report, with one row for each asbestos item. You can search and filter the list by using the search fields at the top of the screen.



- **Documents** – lets you upload, store and access your own files that are relevant to the survey in some way, for example you might want to store procedures or general information relating to the site.
  - Click the **Choose File** button to upload a document that you want to file with the site or drag a document to the drop zone.
  - Click the underlined filename to download a document to your PC.
  - Click the **Delete** button if you want to remove a document from the document folder.



- **Plans** – lets you display any plans that have been uploaded for the survey. All images stored in (or uploaded into) the \Drawings sub-folder (or other named sub-folder) of the project folder are displayed. If no plans are available then the button is greyed out.

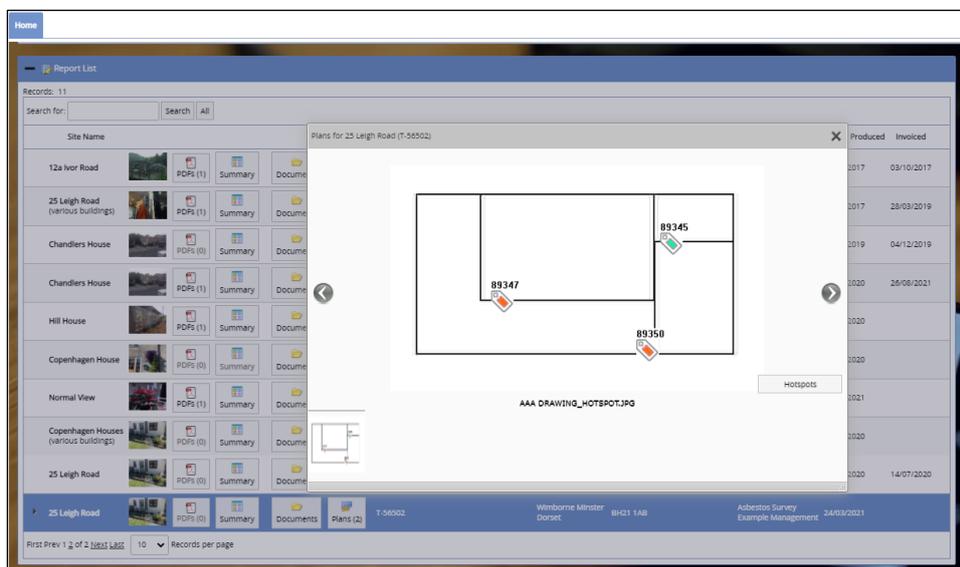


### 3.5.1 Viewing hotspot drawings on the Portal

Drawings that have had hotspots added in Alpha Tracker (automatically generated tags for survey items) can be displayed on the Client Portal and all tags viewed. These drawings are linked to individual projects.

To display the hotspot drawings:

1. Find the required project on the Report List and click the **Plans** button. The hotspot JPG file is displayed, for example:

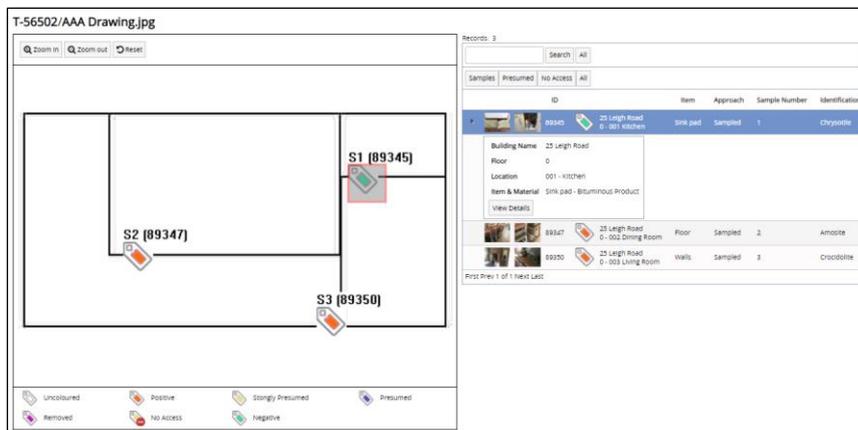


If there is more than one drawing available, then the different drawings are displayed at the bottom of the screen, and you can click on the one you want to view or use the left/right arrow buttons to move between them.

2. Click on the **Hotspots** button and then on the link **“Click to view live plan...”** to access the hotspot drawing if one is available.

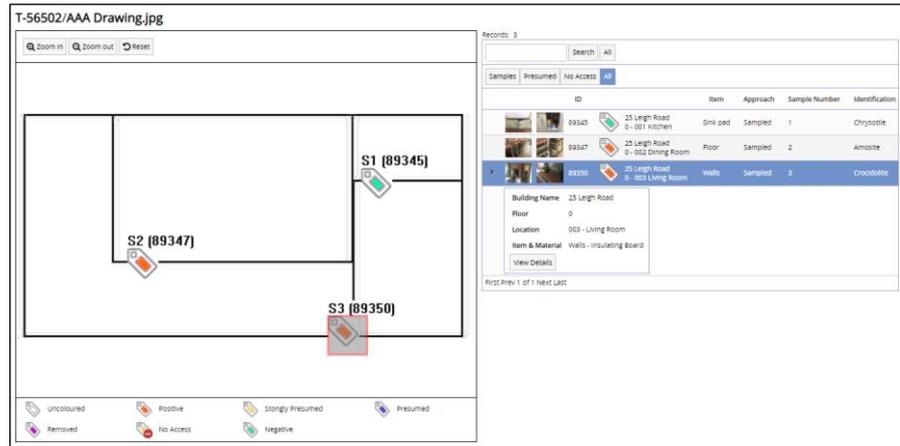


The live plan is displayed, with the drawing on the left and the list of survey items on the right:



On the live plan you can:

- Easily see whether an item is positive, negative, presumed, no access etc by the colour of the tag on the drawing.
- Use the wheel on your mouse or the **Zoom in** and **Zoom out** buttons above the drawing to zoom in and out.
- Click and hold on the drawing and move the mouse to move the image in any direction.
- Use the **Reset** button to return to the default zoom and view of the drawing.
- Filter the list of items by using the buttons above the item list, eg to show only Samples or only No Access items.
- Click on a survey item on the list and see the hotspot flash making it easy to locate it on the plan.
- Click on a tag on the drawing to view summary details of the item on the item list on the right-hand side:



- See more item details, including the risk score breakdown and larger versions of the photos, by clicking the **View Details** button.



 *The hotspots cannot be amended from the Client Portal.*

### 3.5.2 Viewing CAD drawings on the Portal

It is possible to view CAD drawings (DWG files) on the Client Portal, in the same way as you view hotspot drawings (see above). These drawings are linked to individual projects.

Find the required project on the Report List and click the **Plans** button to display project plans/drawings.

In order to view the DWG files stored with a project, you need to have a DWG viewer installed. Also there must be a JPG version with the same name saved in the same location as the DWG file.

The system displays only JPGs in the Plan viewer. If however the name of the DWG file is the same as the JPG, eg "Plan1.JPG" and "Plan1.DWG", then clicking the "i" icon displays the DWG file.

If you do not have a DWG viewer, then you can see the JPG. Any user who does have a DWG viewer has the ability to click through to the DWG version.

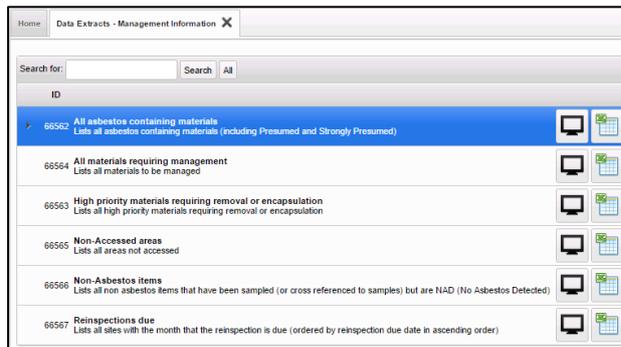
## 4. RUNNING REPORTS ON YOUR DATA

The Alpha Tracker Client Portal enables you to query your data using pre-defined data extracts. You can display the results on screen, search the results and, if required, download the data to manipulate further as you wish.

### 4.1 Running data extracts

The data extracts that you can run on the Alpha Tracker Client Portal are listed as Management Info reports. To run these:

1. Select "Management Info" from the Data Extracts menu. A list of the available reports is displayed.



2. Select the report that you want to run and click the monitor icon to extract the data and display the results on screen, below the list of reports.

Site Name	Building Name	Survey Date	Project Number	Survey Type	Floor	Location	Location Description
46-48 Bunkers Street	46-48 Bunkers Street	27/02/2014	3-00003	Asbestos Survey	0	001	Bedroom
63 Hay Street	63 Hay Street	12/03/2014	3-00005	Asbestos Survey	0	008	Board Room
63 Hay Street	63 Hay Street	12/03/2014	3-00005	Asbestos Survey	0	010	Reception
63 Hay Street	63 Hay Street	12/03/2014	3-00005	Asbestos Survey	0	011	Exploration Office
63 Hay Street	63 Hay Street	12/03/2014	3-00005	Asbestos Survey	1	006	Stairwell
Crane Bank	Crane Bank	12/12/2014	1-00204	Example Management	1	003	WDR Room
Innovation Centre	Innovation Centre	23/02/2015	3-13129	Example Management	0	003	Reception
The Victoria	63 Hay Street	12/03/2014	3-00011	Asbestos Survey	0	008	Board Room
The Victoria	63 Hay Street	12/03/2014	3-00011	Asbestos Survey	0	010	Reception
The Victoria	63 Hay Street	12/03/2014	3-00011	Asbestos Survey	0	011	Exploration Office
The Victoria	63 Hay Street	12/03/2014	3-00011	Asbestos Survey	1	006	Stairwell

You can also download the data to an Excel™ spreadsheet by clicking the spreadsheet icon instead of the monitor icon.

3. Work with the data as required, for example you might:
  - scroll through the displayed results by using the scroll bar on the right
  - search for specific entries by using the **Search** field on the right.

## 5. UPLOADING DOCUMENTS

This section describes how you can upload and store a range of documents related to the management of asbestos. Any documents that you upload are easily accessible to anyone with access to your Alpha Tracker Client Portal.

Users of the Client Portal can upload documents to folders on the Client Portal in three places:

- on each Site – this folder is for documents that relate to the whole site
- on each Project – this folder is for documents that are specific to individual projects/surveys
- in the “Other Documents” section – these folders allow you to maintain a library of documents related to your management of asbestos.

### 5.1 Uploading site-related documents

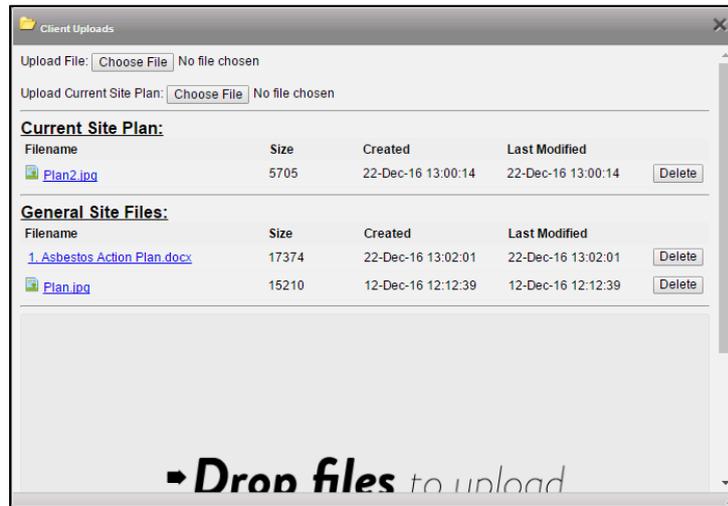
Site-related documents might include the current site plan as well as general site files. Users with standard access permissions can upload or download general site files. Users with higher access permissions have the additional ability to upload the current site plan into a separate section of the Client Uploads and to delete files. With higher access permissions you might also have the ability to create subfolders in the Client Uploads section.

To upload and download documents that relate to a whole site:

1. From the Site List & Compliance Summary or from the Site Grid, click on the folder icon for the selected site:



2. Click the top **Choose File** button, next to Upload File, to upload a document that you want to file with the site, or drag a document to the drop zone.
3. Click the underlined filename to download a document to your PC.
4. Click the **Delete** button if you want to remove a document from the document folder.



Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.



It is also only users in the "Client Admin" group who can upload the current site plan. Users in the "Clients" group can only download this file.

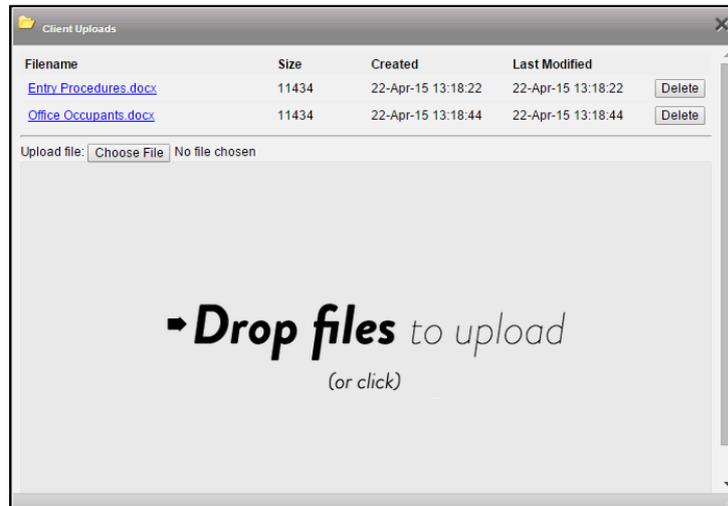
## 5.2 Uploading project-related documents

To upload and download documents that relate to an individual project:

1. From the Report List, This Month, Pending or Archived Report List, click on the folder icon for the selected project:



2. Click the **Choose File** button to upload a document that you want to file with the project, or drag a document to the drop zone.
3. Click the underlined filename to download a document to your PC.
4. Click the **Delete** button if you want to remove a document from the document folder.



*Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.*

## 5.3 Maintaining a library of other documents

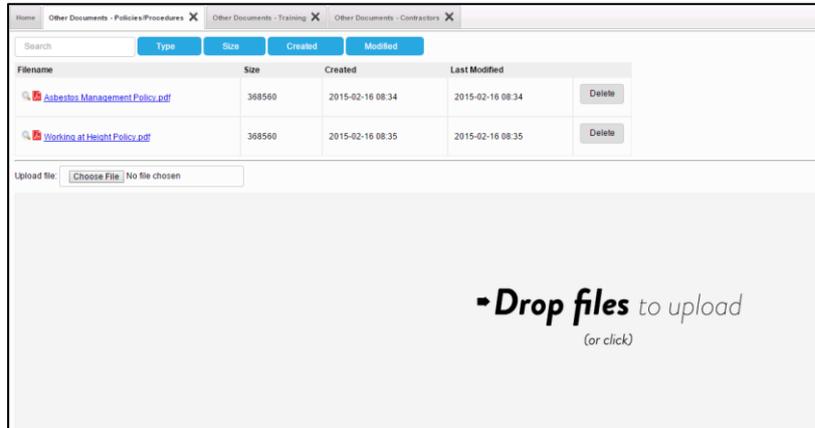
The Alpha Tracker Client Portal lets you upload any number of documents and displays them in a list from where you can easily download them at any time or delete them when no longer required. The "Other Documents" that you can upload to the Client Portal are grouped into three categories:

- Policies/Procedures
- Training
- Contractors.

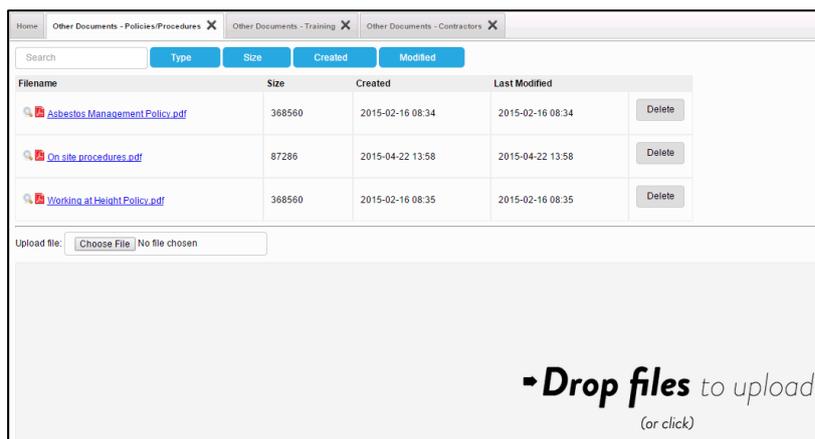
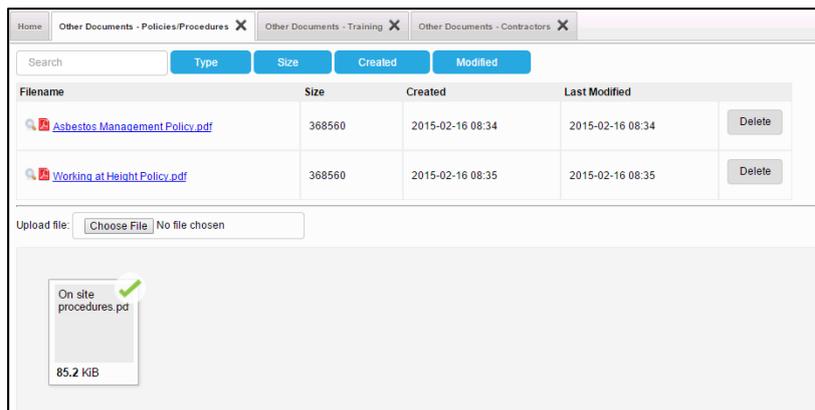
You might, for example, want to store copies of training certificates for staff qualified to work with asbestos in the Training category or details of contractors with whom you are allowed to work in the Contractors category.

To upload a document:

1. Select "Policies/Procedures", "Training" or "Contractors" from the Other Documents menu depending on the category of document you are uploading.



2. Click the **Choose File** button, browse to the file that you want to upload and select it. Your file is displayed on the list. Alternatively you can drag and drop the file onto the drop zone at the bottom of the screen, then when you next open the screen the file is added to the list.



To download a document:

1. Select "Policies/Procedures", "Training" or "Contractors" from the Other Documents menu depending on the category of document you want to download.
2. Scroll to the required document and click on its underlined name. The file is downloaded to your PC for you to open it and work with it as required.



*You can also get a preview of a document without downloading it by clicking on the magnifying glass icon to the left of its name.*

If you make changes to a document you have downloaded and want to make the new document available to others via the Client Portal, you will need to delete (or rename) the original from the Client Portal and upload a new version.

To delete a document, simply click on its **Delete** button.



*Note that only users in the permission group "Client Admin" have the ability to delete documents. Users in the "Clients" group can upload and download but cannot delete documents.*

## 6. MAINTAINING CONTACT & USER DETAILS

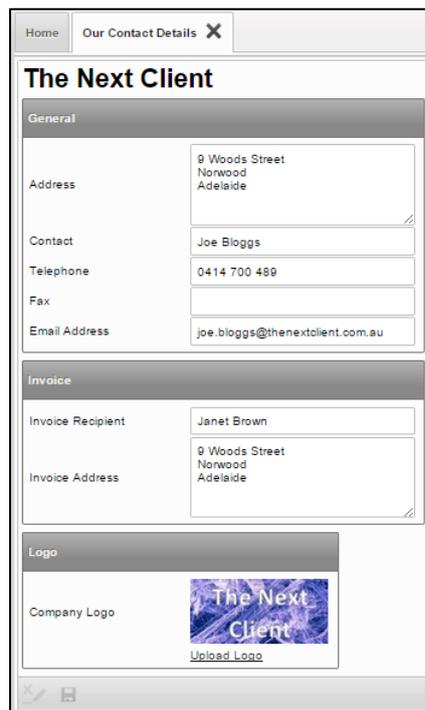
This section describes how you can update the contact details that are stored for you in Alpha Tracker. This means that you can maintain your name, address, contact and logo details yourself. You also have the ability to create additional sign-ins to your Client Portal.

Both these features are restricted to “Client Admin” users.

### 6.1 Updating your contact details

To display your contact details and update them as necessary:

1. Select “Our Contact Details” from the Contact Details menu to display the Our Contact Details screen.



The screenshot shows a web interface for 'The Next Client' with the following sections:

- General**
  - Address: 9 Woods Street, Norwood, Adelaide
  - Contact: Joe Bloggs
  - Telephone: 0414 700 489
  - Fax:
  - Email Address: joe.bloggs@thenextclient.com.au
- Invoice**
  - Invoice Recipient: Janet Brown
  - Invoice Address: 9 Woods Street, Norwood, Adelaide
- Logo**
  - Company Logo: [Image of 'The Next Client' logo]
  - Upload Logo link

2. Amend or update the details as necessary. You can upload a new or changed logo by using the Upload Logo link in the Logo section.
3. Save any changes you have made.



*Note that only users in the permission group “Client Admin” have the ability to amend the details. Users in the “Clients” group can only view the details.*

## 6.2 Creating additional users

You can create additional users for your Client Portal and manage the users by, for example, changing passwords and restricting which sites a user has access to. Only “Client Admin” users can see this menu option.

1. Select “Users” from the Web Security menu to display the Users screen.

User ID/Email	Password
EG1	
*	

2. Add a new user by typing the username and password into the blank row at the bottom of the list.
3. Save the new sign-in details. The sign-in is valid immediately and is automatically assigned the permissions for a standard Client Portal user, ie not Client Admin.
4. If required, restrict the sign-in to specific sites by clicking its plus button and specifying the sites to which this user is to have access. If no sites are specified, the user can access all sites.

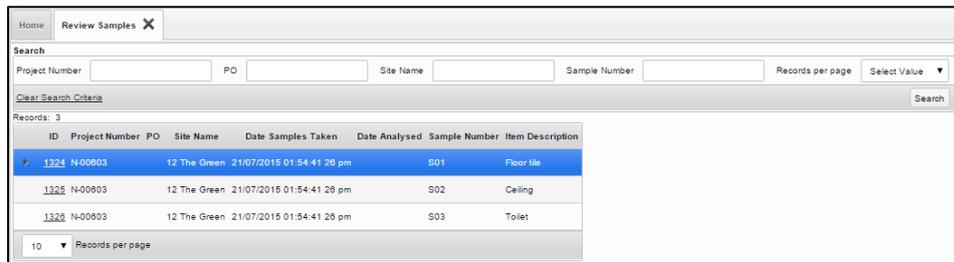
## 7. UPLOADING BULK SAMPLES

In this section you can find instructions on how to enter and upload bulk sample details directly into Alpha Tracker for processing, if you have the option switched on in your Alpha Tracker Client Portal, and how to review your bulk samples.

### 7.1 Reviewing samples

You can see details of submitted bulk samples by using the Review Samples menu option. If results have been recorded you can see these by drilling down into the details.

1. Select “Review Samples” from the Bulk Samples menu to display the Review Samples screen.

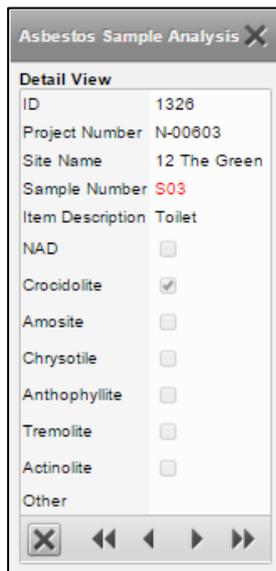


The screenshot shows the 'Review Samples' interface. At the top, there are search filters for Project Number, PO, Site Name, and Sample Number, along with a 'Records per page' dropdown and a 'Select Value' dropdown. Below the search bar, there is a 'Clear Search Criteria' link and a 'Search' button. The main area displays a table with 3 records. The first record is highlighted in blue and has its ID (1326) underlined. The table columns are ID, Project Number, PO, Site Name, Date Samples Taken, Date Analysed, Sample Number, and Item Description.

ID	Project Number	PO	Site Name	Date Samples Taken	Date Analysed	Sample Number	Item Description
<u>1326</u>	N-00603		12 The Green	21/07/2015 01:54:41 26 pm		S01	Floor tile
1326	N-00603		12 The Green	21/07/2015 01:54:41 26 pm		S02	Ceiling
1326	N-00603		12 The Green	21/07/2015 01:54:41 26 pm		S03	Toilet

At the bottom of the table, there is a 'Records per page' dropdown set to 10.

2. Drill into the details to see any results by clicking on the underlined ID on the required sample record. A summary of the asbestos sample analysis is displayed.



The screenshot shows the 'Asbestos Sample Analysis' interface. It features a 'Detail View' section with the following information:

- ID: 1326
- Project Number: N-00603
- Site Name: 12 The Green
- Sample Number: S03 (displayed in red)
- Item Description: Toilet

Below this information, there is a list of asbestos types with checkboxes:

- NAD:
- Crocidolite:
- Amosite:
- Chrysotile:
- Anthophyllite:
- Tremolite:
- Actinolite:
- Other:

At the bottom of the screen, there are navigation buttons: a close button (X), a back button (left arrow), and a forward button (right arrow).

3. View each record in turn by clicking the next record navigation button at the bottom of the screen. If a sample has a positive result, the sample number is displayed in red, on the both the Review Samples screen and the Asbestos Sample Analysis screen.

## 7.2 Entering new samples

You can supply the details of your bulk samples that require analysis by your surveying company by typing them directly into Alpha Tracker, using the Enter New Samples screen. This creates a project for the surveying company and also sends notification emails.

1. Select "Enter New Samples" from the Bulk Samples menu to display the Enter New Samples screen. This is the first step of a two-stage process.

2. Fill in the fields to specify the site to which the samples relate, and the site contact details.

In the **Site Name** field enter the first line of the address, eg "77 Windermere Drive". Type the rest of the address in the **Address** field, eg "Priorslee, Telford".

Then click **Next** to display the screen for step 2.

3. Select the office to which you are submitting the samples from the list displayed. If there is only one office displayed, select this. Then click **Confirm**.

A screen is displayed for you to list the samples that you are submitting.

- Click **New Sample** and enter the details of the first sample. You need only enter the Location eg “Kitchen” and the Item Description eg “Vinyl floor tile”. Optionally you can also enter your own reference number. Then click **Save**. The saved sample details are displayed in a list on the right of the screen.

- Repeat step 4 for all the samples you are submitting.



Note that there is a **Delete Sample** button which you can use if you find you have made a mistake. Select the sample on the right then click the **Delete Sample** button to delete it.

- When your list of samples is complete, click the **Submit Samples for Analysis** button and confirm the submission.

A message informs you that the samples have been submitted and that you will be signed out of the system.

- Click **OK** to sign out.

Once the samples are submitted, the system sends an email to the email address given in the site contact details. The email confirms the site name, project number and list of samples. Your surveying company will also receive an email informing them of the submission.

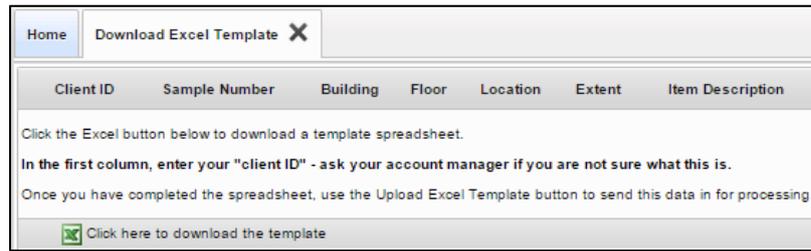


Use the *Review Samples* menu option described in Section 7.1, *Reviewing Samples*, to track the status and results of your submitted samples once analysis is underway.

## 7.3 Uploading new samples

Instead of entering the details into a screen, you can use a spreadsheet to upload new sample details directly. A template spreadsheet is available for you to download, you need only complete the details and then upload it.

- Select “Download Excel Template” from the Bulk Samples menu to display the Download Excel Template screen.



2. Click the button at the bottom of the screen to download the template spreadsheet. The spreadsheet is blank apart from the column headings which inform you of the information required.



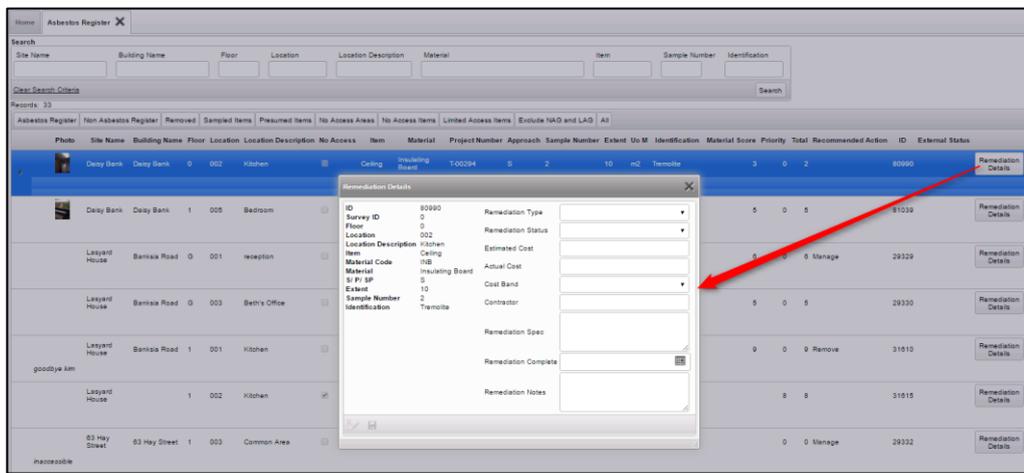
*If you do not know your client ID please ask your account manager as this is required data.*

3. Complete the spreadsheet with the bulk sample details and save it.
4. Use the **Upload Excel Template** button to upload the completed spreadsheet and submit it for processing.

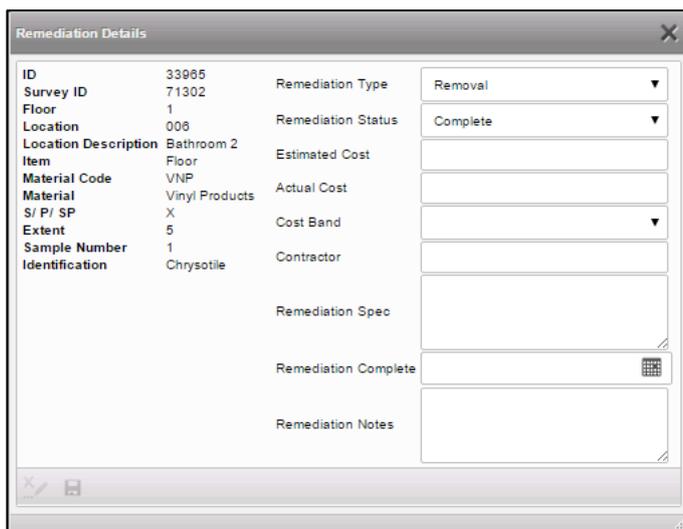
# 8. RECORDING REMOVAL/ REMEDIATION DETAILS

It is possible to update survey items between surveys to reflect remediation or removal work. This can be done from within Alpha Tracker by your surveying company but may also be available in your Client Portal.

If it is available within the Client Portal, click the **Remediation Details** button on an item on the Asbestos Register. For example:



This screen allows you to record remediation or removal details. The item will be marked as “Removed” if it has a **Remediation Type** of “Removal” AND either a **Remediation Status** of “Complete” or a **Remediation Complete** date. The following screen shows an example:



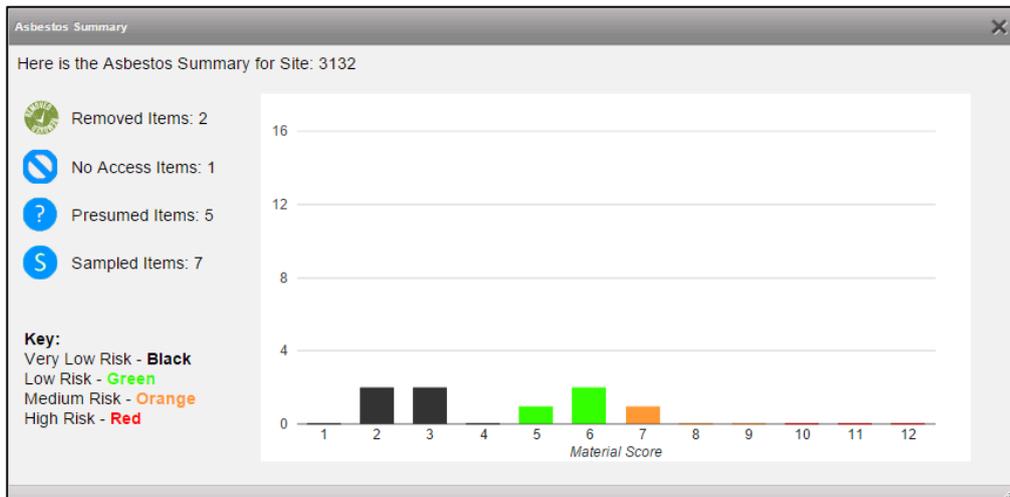
Positive items are marked as “Removed” on the Client Portal if any of the following are true:

- they have an **Approach** of “R”
- they have an **Identification** of “Removed”
- they have a **Remediation Type** of “Removal” AND either a **Remediation Status** of “Complete” or a **Remediation Complete** date. The following screen shows an example.

These removed items are easily identified on the Client Portal by a green “Removed” stamp and can be viewed on the Removed Register:

Photo	Site Name	Building Name	Floor	Location	Location Description	No Access	Item	Material	Project Number	Approach
	Daisy Bank	Daisy Bank	1	004	Bathroom 2	<input type="checkbox"/>	Ceiling Void	Insulating Board	T-00294	P
	Daisy Bank	Daisy Bank	1	006	Bathroom 2	<input type="checkbox"/>	Floor	Vinyl Products	T-00294	X

They are also visible on the Asbestos Summary graph:



Similarly, any items that have had remediation work recorded are visible on the Remediation Register.

## 9. MAINTAINING CONTRACTORS

In this section you can find instructions on how to enter and maintain contractor details, if you have the option switched on in your Alpha Tracker Client Portal. This option enables you to maintain a database of approved contractors.

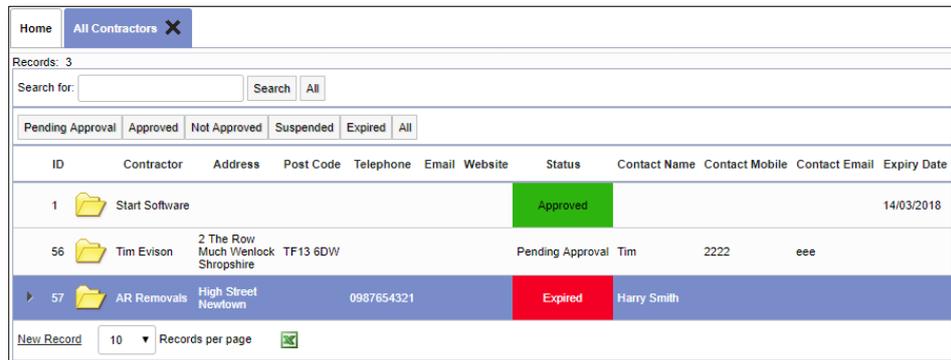
### 9.1 Displaying contractors

You can see details of all contractors, including approved, pending approval and suspended contractors, and update them as necessary, by using the All Contractors menu option.

If you want to work with approved contractors only, then use the Approved Contractors menu option instead.

1. Select “All Contractors” from the Contractors menu to display a list of all your contractors.

The status column is colour-coded to help you quickly identify approved (green), suspended (yellow) and expired contractors (red).



ID	Contractor	Address	Post Code	Telephone	Email	Website	Status	Contact Name	Contact Mobile	Contact Email	Expiry Date
1	Start Software						Approved				14/03/2018
56	Tim Evison	2 The Row Much Wenlock Shropshire	TF13 6DW				Pending Approval	Tim	2222	eee	
57	AR Removals	High Street Newtown		0987654321			Expired	Harry Smith			

2. Double click on a contractor to open the Contractor Details screen.

Contractor Details

ID: 56

Contractor: Tim Evison

Address: 2 The Row  
Much Wenlock  
Shropshire

Post Code: TF13 6DW

Telephone: 0987654321

Fax:

Email:

Website:

Status:  Pending Approval  Approved  Not Approved  Suspended  Expired

Date Last Update: 09/05/2018

Contact details

Contact Name: Tim

Contact Telephone: 1111

Contact Mobile: 2222

Contact Email: info@email.com

Notes: notes

Restrictions: restrictions

Live Date:

Expiry Date:

Folder icon

3. Amend the details as necessary.

Note that you can also file documents against a contractor by using the folder icon. You might, for example, want to store certificates or agreements.

4. Save the changes.

## 9.2 Adding a new contractor

To add a new contractor:

1. Select "Add Contractor" from the Contractors menu to display a blank screen into which you can enter the new contractor details.

Home All Contractors X Add Contractor X

**Setup**

ID

Contractor

Address

Post Code

Telephone

Fax

Email

Website

Status  Pending Approval  Approved  Not Approved  Suspended  Expired

Date Last Update

**Contact Details**

Contact Name

Contact Telephone

Contact Mobile

Contact Email

**Others**

Notes

Restrictions

Live Date

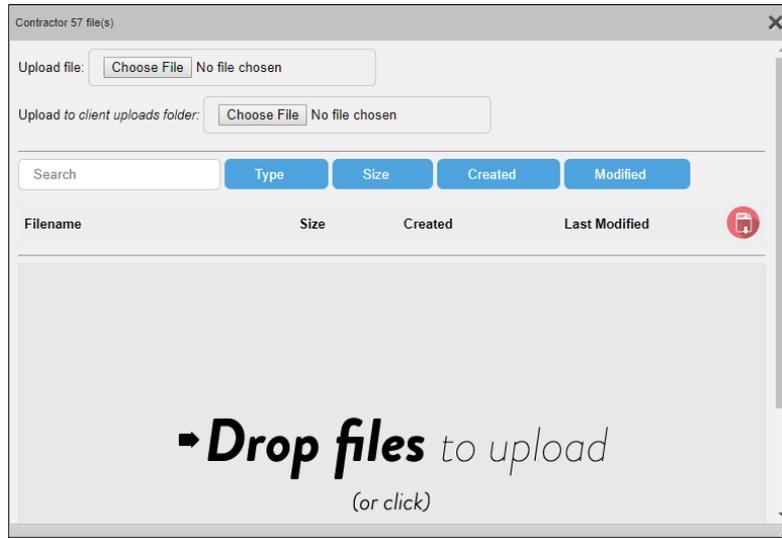
Expiry Date

2. Fill in the contractor details, using one of the radio button to indicate the status.  
You can look up an address from a postcode by completing the **Postcode** field and clicking the **Lookup Address** button.
3. Save the new details.  
A message asks if you would like to upload any files for the new contractor.

Confirmation X

Do you want to upload file(s) to this record?

4. Select **Yes** to open the document folder.



5. Use the **Choose File** button next to **Upload file** to select the files to upload.

### 9.3 Changing a contractor's status

If a contractor changes their status, for example by becoming approved or suspended, you can change their status on the contractors database.

1. Display the contractor's record on the All Contractors, Approved Contractors or Suspended Contractors screen.
2. Double click on the contractor to display their details.

Contractor Details

ID: 57

Contractor: AR Removals

Address: High Street  
Newtown

Post Code:

Telephone: 0987654321

Fax:

Email:

Website:

Status:  Pending Approval  Approved  Not Approved  Suspended  Expired

Date Last Update:

Contact details:

Contact Name: Harry Smith

Contact Telephone: 0987654321

Contact Mobile:

Contact Email:

Notes:

Restrictions:

Live Date:

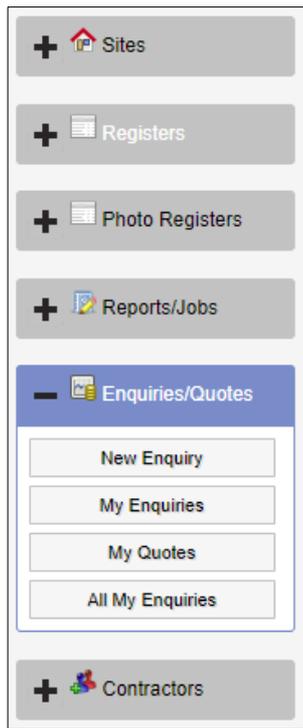
Expiry Date: 10/07/2018

Buttons: Save, Refresh

3. Amend the details as require, eg by changing the **Status**.
4. Save the changes.

## 10. LOGGING ENQUIRIES

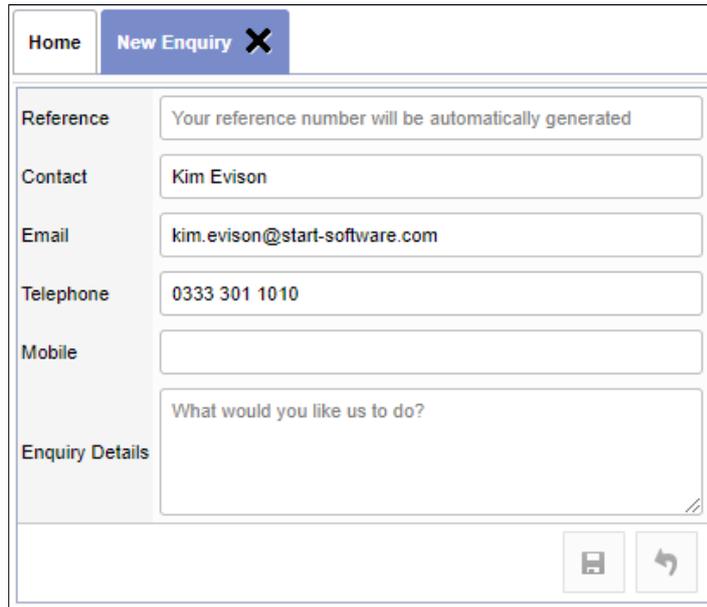
An optional feature on the Client Portal allows you to log new enquiries with your surveying company and also to view the status of your enquiries and quotes. You can find these options on the Client Portal, on the Enquiries/Quotes menu if this is switched on.



### 10.1 Logging an enquiry

Log an enquiry regarding asbestos surveys with your surveying company by using the New Enquiry menu option.

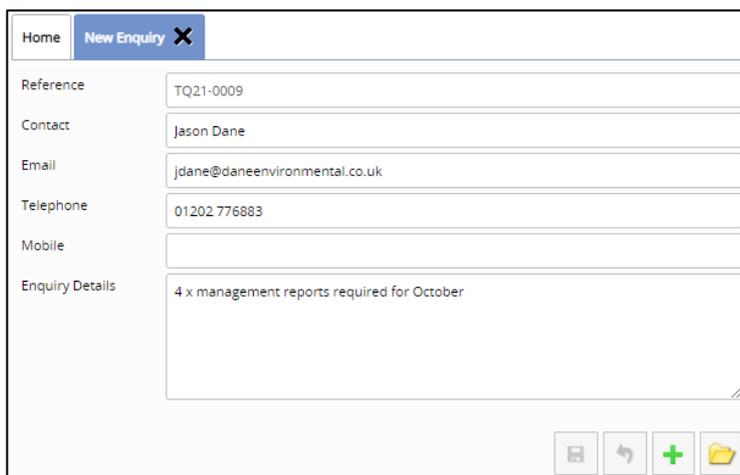
1. Select "New Enquiry" from the Enquiries/Quotes menu to display the New Enquiry screen.



Home New Enquiry X	
Reference	Your reference number will be automatically generated
Contact	Kim Evison
Email	kim.evison@start-software.com
Telephone	0333 301 1010
Mobile	
Enquiry Details	What would you like us to do?

2. Amend the **Contact**, **Email** and **Telephone** details if necessary.
3. Enter details of your enquiry in the **Enquiry Details** field.
4. Save the enquiry.

An email is sent to your surveying company and the enquiry is logged in their Alpha Tracker. You may receive a message acknowledging your enquiry and giving you the reference number. The folder icon is then displayed on the screen for you to upload any supporting files, for example:

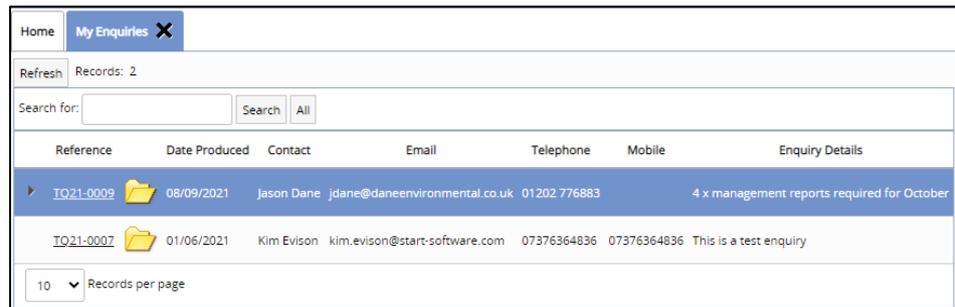


Home New Enquiry X	
Reference	TQ21-0009
Contact	Jason Dane
Email	jdane@daneenvironmental.co.uk
Telephone	01202 776883
Mobile	
Enquiry Details	4 x management reports required for October

## 10.2 Displaying your enquiries and quotation

You can view a list of the enquiries you have raised with your asbestos surveying company by using the My Enquiries and My Quotes options.

1. Select “My Enquiries” from the Enquiries/Quotes menu to display the My Enquiries screen. All your enquiries are listed.



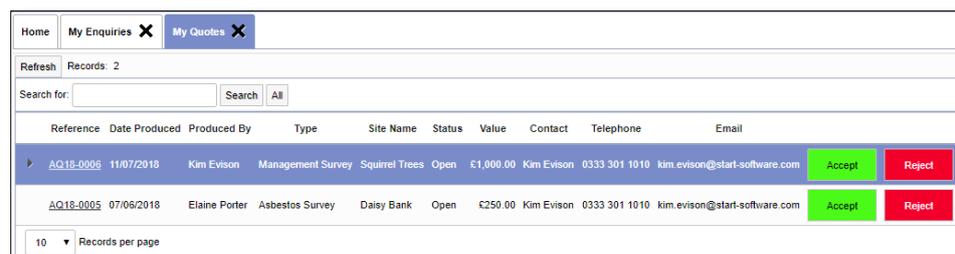
Reference	Date Produced	Contact	Email	Telephone	Mobile	Enquiry Details
<a href="#">TQ21-0009</a>	08/09/2021	Jason Dane	jdane@daneenvironmental.co.uk	01202 776883		4 x management reports required for October
<a href="#">TQ21-0007</a>	01/06/2021	Kim Evison	kim.evison@start-software.com	07376364836	07376364836	This is a test enquiry

2. Click on the underlined **Reference** to display and optionally amend the enquiry details.

## 10.3 Accepting or rejecting a quotation

Any open quotations raised by your surveying company are listed on the My Quotes screen. These open quotations are waiting for action by you. From here you can accept or reject a quotation at the click of a button.

1. Select “My Quotes” from the Enquiries/Quotes menu to display the My Quotes screen. All your quotations are listed.



Reference	Date Produced	Produced By	Type	Site Name	Status	Value	Contact	Telephone	Email	Accept	Reject
<a href="#">AQ18-0006</a>	11/07/2018	Kim Evison	Management Survey	Squirrel Trees	Open	£1,000.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	Accept	Reject
<a href="#">AQ18-0005</a>	07/06/2018	Elaine Porter	Asbestos Survey	Daisy Bank	Open	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	Accept	Reject



*Only summary details of the quotation are displayed on the screen. Please refer to the quotation sent to you by the asbestos surveying company for full details.*

2. Click the **Reject** button if you do not want to accept the quotation.

You are prompted to confirm the rejection and then to enter some reject notes, where you can explain why you are not accepting the quotation.

3. Click the **Accept** button to accept the quotation and confirm your selection.

Accepted or Rejected quotations drop off the My Quotes screen.

4. Display all processed quotations (accepted and rejected) by selecting the “All Quotes” menu option.

Reference	Date Produced	Produced By	Type	Site Name	Status	Value	Contact	Telephone	Email	Reject Notes
<a href="#">AQ18-0006</a>	11/07/2018	Kim Evison	Management Survey	Squirrel Trees	Lost	£1,000.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	<a href="#">Accept</a>
<a href="#">TQ18-0014</a>	07/06/2018	Dan Darkin	Asbestos Survey	63 Hay Street	Accepted	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	
<a href="#">AQ18-0005</a>	07/06/2018	Elaine Porter	Asbestos Survey	Daisy Bank	Accepted	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	
<a href="#">TQ18-0012</a>	24/05/2018	Dan Darkin	Asbestos Survey	Daisy Bank	Won	£300.00	Andrew Greenfield	08 6253 1234	kim.evison@start-software.com	

You can accept a quote that has previously been rejected from this screen.

The plus button next to a quotation on the All Quotes screen lets you view details of projects created by the surveying company from a quotation. For example:

Reference	Date Produced	Produced By	Type	Site Name	Status	Value	Contact	Telephone	Email	Reject Notes
<a href="#">TQ18-0014</a>	07/06/2018	Dan Darkin	Asbestos Survey	63 Hay Street	Accepted	£250.00	Kim Evison	0333 301 1010	kim.evison@start-software.com	
<a href="#">TQ18-0012</a>	24/05/2018	Dan Darkin	Asbestos Survey	Daisy Bank	Won	£300.00	Andrew Greenfield	08 6253 1234	kim.evison@start-software.com	

Project Number	Project Opened	Project Type	Project Manager
<a href="#">T-56052</a>	24/05/2018	Asbestos Survey	Kim Evison