



Quick Access Dock – Quick Start Instructions

A Docking Tool has been added to the Windows Drop Down in the latest 5.03.21.040 version. Simply access the Windows Drop down in XSellerator and select the “Quick Access Dock”. It will then be visible on the left hand side of the page. This Quick Access Dock can be customized per user and used to access reports, websites and windows inside of XSellerator quickly and easily by double clicking the desired option.

The screenshot shows the XSellerator application window. On the left is a 'Favourites' dock with a tree view containing 'Service', 'Service Appointment', and 'Work Orders'. The main window has a top navigation bar with 'Fixed Operations', 'Sales', 'Accounting', and 'General'. Two data tables are displayed:

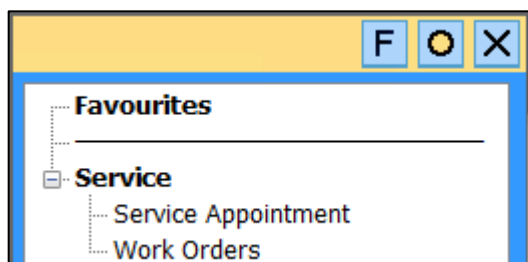
Employee	WA%/Insp%	Quoted \$ / %	Close %	Revenue	SQ L/So
Brady Nile	94.7% / 64.5%	\$0 / 2.7%	0.0%	\$0	2 / 0
Darcy Smith	90.8% / 19.5%	\$59,138 / 120.0%	42.1%	\$24,881	246 / 194
Debbie Steedsman	75.0% / 51.8%	\$0 / 5.3%	0.0%	\$0	3 / 0
Donald Carswell	0% / 0%	\$11,481 / 35.1%	12.7%	\$1,460	13 / 2

Employee	Insp. %	Quoted \$	Close %	Revenue
Edward Van Heeren	4.2%	\$3,034	5.0%	\$151
Logan Vandekerboom	0%	\$749	0.0%	\$0
Mathew Fontana	23.7%	\$513	0.0%	\$0
Mike Molnar	15.4%	\$10,122	21.4%	\$2,164
Travis Scott	4.7%	\$2,053	0.0%	\$0
William Navera	3.3%	\$45	0.0%	\$0
Totals	8.7%	\$16,517	14.0%	\$2,315

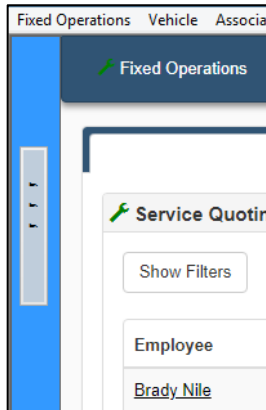
Start by customizing how the Quick Access Dock is displayed inside XSellerator.

Clicking the F (Float) button in the screen shot below will cause the Dock to be uninned and float on the page. It can now be moved to any location in XSellerator. Clicking the D (Dock) button will lock the pane back in place to the left of the window.

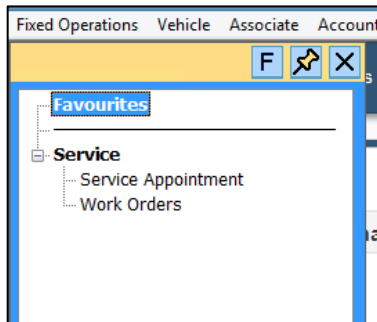
Clicking the O (Unpin Dock) button in the screen shot below will allow the Dock to collapse, freeing up more work space in XSellerator.



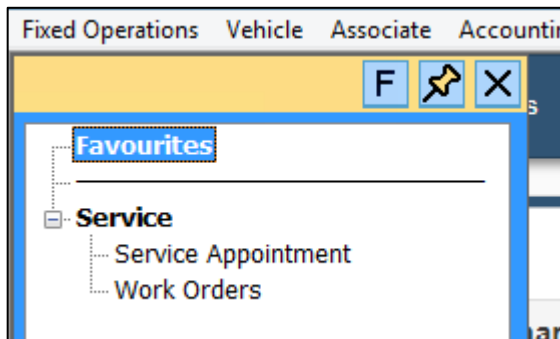
Below is how the Quick Access Dock appears once it has been unpinned. Simply click on the grey tab to restore the Dock.



Click the Pin Icon if you would like to pin the Dock again.



And, if you would like to exit the Dock completely, click the X (Close Dock) button.

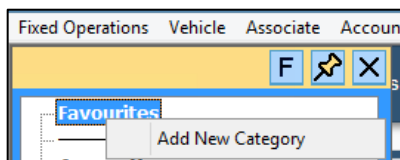


The Quick Access Dock is loaded on a per user basis and on its initial opening it will look like the screen shot below.

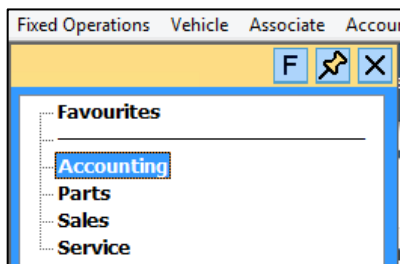


Each user will have the option to add their own Categories, Windows, Websites and Reports.

To get started, right click on the Favourites option in the Dock. This will give you the option to add a new Category and label it as you please.



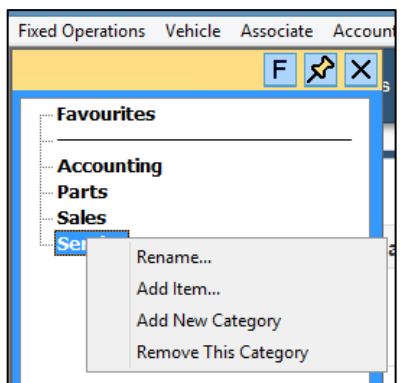
Below we have added the Categories: Accounting, Parts, Sales and Service



Now that we have our Categories, we can add Windows, Websites or Reports to each category.

Right clicking on a Category will give a list of options to select from.

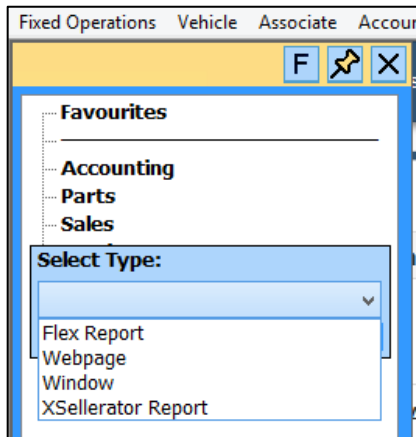
- The first selection will give you the option of renaming the Category
- The second selection will give you the option to add an item to the Category
- The third selection will give you the option to add a new Category
- The fourth and final selection will give you the option to remove the current Category.



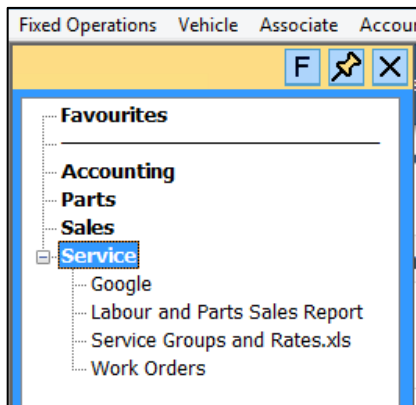
When clicking the “Add Item...” option, you will get another drop down.

- The first selection will allow you to add a link to a flex report. When selected, another drop-down will appear showing a list of available Flex Reports. Select the desired report from the drop down to add it to the Category.
- The second selection will allow you to add a Website. When selected, you can enter the display name of the website you would like added. Then, after clicking ok, you will be able to add a URL for the website. The website that has been added will now have a quick link added to the Category in the Quick Access Dock.

- The third selection will allow you to add an XSellerator window to the Quick access Dock. Once selecting this option, you will be directed to another drop down with a list of XSellerator windows that can be selected to add to the Category in the Quick Access Dock
- The fourth and final selection will allow you to add an XSellerator Report to the Quick Access Dock. After selecting this option, you will be directed to another Drop Down where you can select an XSellerator Report to add to the Quick Access Dock



In the screen cap below, we have added four items to the Service Category. Double clicking on any of these items will load the desired page.



These items will remain in the Quick Access Dock and will be accessible the next time XSellerator is opened.

For more information on the Quick Access Dock, please contact [Customer Support](#) and we'll be happy to answer your questions.