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How to Use this Guide

This manual is designed as a reference for JobPro™ customers. It is not intended to be a replacement for training. Information in this guide is divided into five sections:

- Chapter 1: Getting Started
- Chapter 2: Entities
- Chapter 3: Reports
- Chapter 4: Configuring the System
- Chapter 5: Advanced Topics

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Chapter 1: Getting Started

Introduction

Introduction to JobPro™

Dedicated to and designed by service providers for the service provider industry, JobPro™ Technology offers a unique web-based technology application. This robust web-based system provides our current clients and future partners real-time access to critical, customer specific data 24/7.

JobPro™ Benefits

Generate and automate bids and quotes.

JobPro™ will provide a consistent format for bids and quotes.

- Professional and accurate proposal for every customer.
- No more "recreating the wheel" with every bid or quote.
- Track all bid revisions by customer.

Track and manage all your jobs.

JobPro™ gives you the ability to monitor multiple jobs for key specific information.

- Work Orders
- Change Orders
- Purchase Orders
- Scheduling Calendar
- Time Entry
- Employee Assignments

Generate invoices.

- Create invoices by job in JobPro™
- Export invoices to QuickBooks®

Track and monitor productivity.

JobPro™ can assist you to prioritize your most productive crew and employees. It provides you analytics for job assignments, maximizing resources.

Track actual time and product inventory per job.

Measures your productivity by specific job on a daily basis. JobPro™ will give you an accurate understanding of time allocation and inventory needs.

Lead Tracking Tool.

Track your valuable leads by sales person and by office.

Your Past, Current and Future Customer and Company Database.

JobPro™ eliminates the need for hard copy files. You have instant access to critical, time sensitive information and JobPro™ significantly reduces information search time.

Web based and Secure.

With internet access, there is no need to download software. Your information and data is 100% secure at our ***fully-redundant*** data center where we deliver full-time security so your JobPro™ system is always functional.

Access 24/7.

Your company data is accessible wherever you have a computer and internet service. This one benefit alone can give you flexibility with your schedule, saving you time and reducing transportation costs.

System Basics





Logging In

To login to your JobPro™ system visit <http://JobProtech.com/>. Click on Client login at the top of the screen and enter your login ID and password. If you have forgotten login ID or password, contact your system administrator. System administrators should contact support@JobProtech.com or call (704) 584-4015 for assistance.



Basic Navigation

In the upper right corner you will see four buttons that will assist you while using the system:

-  will allow you to go back to a previous page
-  will refresh the page you are currently viewing
-  will take you back to the home page and executive dashboard
-  will log you out

The Main Menu allows you to search and add entities along with creating reports and configuring your system.



Global Searching

Global Search allows you to easily find any record within your system. You can search based on the name or phone number of a customer, supplier or contact, or based on the name or number of a data sheet, bid, job or purchase order. Enter the information into the text box located at the top of the screen and click **Search**. Your results are displayed by the type of record you have found (bid, company, job, etc...), the name of that record, and what criteria the record was matched on (name, work phone, PO number, etc...). To access the record, click on the **Name**.

Search (Bid/Job #, Name, Phone):

Global Search Results	
Page 1 of 2 results page(s)	43 item(s) found
Excel	Print
Refresh	
Name 	Matched On 
Bid: dan test	Name
Company: Test	Name

Executive Dashboard

The Executive Dashboard displays all bids, data sheets, and jobs currently in your system. It displays the status of each, how many are in the system, and the total dollar amount of each. Click on a row to view those entries.

Another feature you see is the Daily Alerts. Alerts are generated when bids or data sheets assigned to you have a next call date in the past or today. They are generated at midnight each night. Click on the Description to view that datasheet or bid. Click the **X** to delete the alert.

Welcome to JobPro			
Executive Dashboard			
Type	Status	Bid Total	# Entered
Bids	Accepted	\$12,653.50	12
Bids	In Development	\$6,782.12	5
DataSheets	Closed		10
Jobs	Active		4
Jobs	New		3
Click on a row above to view detail			

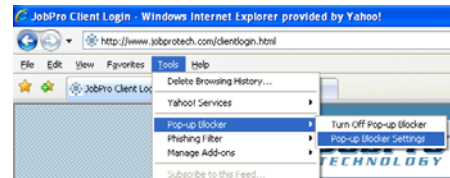
Daily Alerts 1	
Type	Description
Follow-Up	The bid 'Test 3' has a next call date of 10/01/2008. X
Click on an alert to view that datasheet or bid. Use the red 'X' to delete an alert.	

Popup Blocker disabling

Several JobPro™ reports require pop-up windows to function properly. In order to have functionality of these reports you may have to add a rule to allow pop-ups from your JobPro™ website.

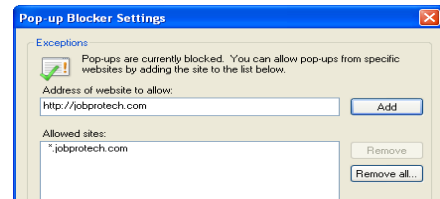
To change the Pop-Up Blocker settings:

1. Open Internet Explorer
2. On the **Tools** menu, point to **Pop-up Blocker**, and then click **Pop-up Blocker Settings**



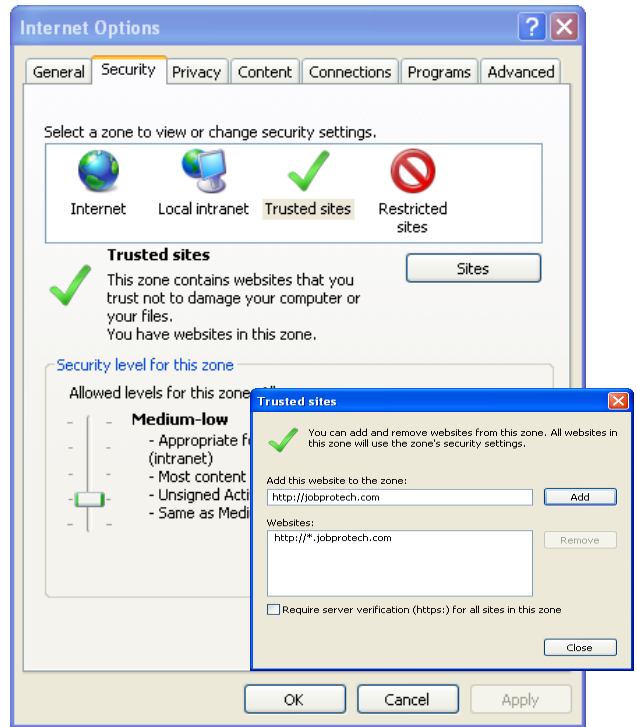
Add JobPro™ to the allowed sites:

1. Under **Address of website to allow**, type <http://JobProtech.com>
2. Click **Add**
3. Click **Close**



To add JobPro™ to your trusted sites:

1. On the **Tools** menu, click on **Internet Options**
2. Under the **Security** tab, click on **Trusted Sites**
3. Under **Security level for this zone**, scroll to **Medium-Low**
4. Click **Sites**
5. Under **Add this website to the zone**, type `http://JobProtech.com`
6. Make sure the box next to **Require server verification (https:)** for all sites in this zone is unchecked
7. Click **Add**
8. Click **Close**
9. Click **OK**



Business Flow Diagram



From the time a lead is created to when a job is completed, there are three possible phases in JobPro™. Each phase is not required but we recommend using JobPro™ to track everything from leads to bids to jobs.

- A Data Sheet is the first phase of a potential job. The Data Sheet should be created when an incoming call arrives at the office, a sales person identifies a new lead, or if an existing customer indicates they need additional work. See the [Add Data Sheet](#) section to review how to create a new Data Sheet.

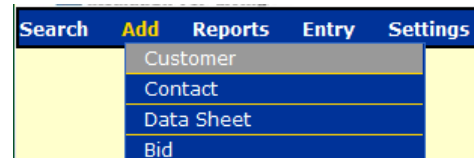
- A Bid is the next phase of a potential job. Data Sheets should be converted to bids when the sales person wishes to start estimating the job. When a bid is created from a Data Sheet, the Data Sheet will automatically be closed. Bids can also be created directly using the [Add Bid](#) Menu option.
- Finally, when a bid is accepted, a bid should be converted to a job. This is the final phase in the JobPro™ work flow. Jobs are used to schedule, assign, invoice, and manage the work. Work Orders are generated from the job and time is entered to jobs. See the section on [Jobs](#) to review this third phase.

Chapter 2: Entities

This section will explain adding, editing, searching and deleting every type of object available in JobPro™.

Customers

Customers can be an individual or a company. When the customer is a company, contacts can be used to enter names of people within the organization. See next section for [adding contacts](#).



Adding a Customer

1. Point to **Add** on the main menu, and then click **Customer**
2. Fill out the New Company Information:
 - a. Enter a company or customer name
 - b. Choose a status for the customer. Typical statuses include prospect or customer.
 - c. Choose a category for the customer. Typical categories may be builder, homeowner, or architect. To add or edit the possible categories, see configuring [Company Categories](#).
3. Fill out the Billing Address
4. Fill out the Contact Information
5. Click **Submit**

Information Request

NEW COMPANY:

Enter Company Name:

Status:

Category:

Billing Address

Address 1:

Address 2:

City:

State:

Zip:

Company Fax:

Contact Information

First Name:

Last Name:

Title:

Work Phone:

Cell Phone:

*Note: Only Company name is required to move forward. You will have an opportunity to fill the other text boxes in.

Searching for a Customer

1. Point to **Search** on the main toolbar, and then click **Customers**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Customers** to show all.
3. To view a customer, click **View** in search results

Customer Search

Customer Name:

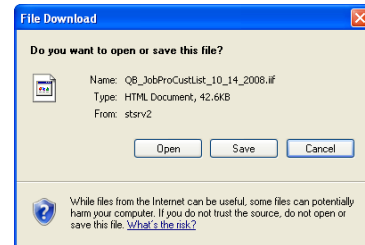
Customer Address:

Status: ▾

Category: ▾

QuickBooks

4. Clicking the **QuickBooks** button will export your entire customer database into the native QuickBooks format (.iif) for download. Follow the instructions from QuickBooks to import it into your spreadsheet. You can export your customer database as often as you like to keep your QuickBooks records in sync. QuickBooks will update your existing records if a match is found so no duplicates are made.



Editing a Customer

There are ten tabs that allow you to edit information within a bid.

1. Main – This tab contains the basic information about a customer. Click **Change Customer Name** to edit the organization’s name.
2. Address – Displays the mailing address of the company.
3. Contacts – Displays contacts within the company. Click **Add Contact** to fill out new contact information. Refer to [adding a contact](#).

Company: Acoustic Distributors

Balance: 3944

Main | Address | Contacts | Invoices/Payments | Properties | Jobs | Bids | Data Sheets | Notes | Documents

Status: ▾

Category: ▾

Account #:

Assigned To/Sales Person: ▾

Company Phone:

Company Fax:

Company Email:

Company Website:

Company: Acoustic Distributors

Balance: 145

Main | Address | Contacts | Invoices/Payments | Properties | Jobs | Bids | Data Sheets | Notes | Documents

		2 transactions found		Excel	Print	Refresh		
Type	ID	Job	Date	Payment Method	Check #	Debit	Credit	Entered By
View	Payment	24	10/14/2008	Check	1234		\$190.00	snichols
View	Invoice	10054	Test 3 10/7/2008			\$495.00		SNICHOLS

4. Invoices/Payments – JobPro contains a basic accounting module which can be activated if desired. The module allows you to enter payments for customers as they are received and apply the payment to any outstanding invoice(s). This tab contains invoices and payments for a customer. The transactions are listed in general ledger format with the most recent transactions appearing first. Click ‘View’ next to an invoice or payment to see detail for the transaction. Click **Add Payment** to make a payment. Refer to [making a payment](#).
5. Jobs – Displays all of the jobs associated with this customer. Click **View** to view a job.
6. Bids – Displays all of the bids associated with this customer. Click **Add Bid** to view the add bid screen. Refer to [adding a bid](#). Click **View** to view a bid.
7. Data Sheets – Displays all of the data sheets associated with this customer. Click the name of the data sheet to view it.
8. Notes – Contains any additional notes about customer. Notes are time stamped. Click **Add Notes** to add additional notes.
9. Documents – Contains any uploaded documents pertaining to customer. Click **Add Documents** to upload a document.

When finished, click **Save** or **Save and Return**.

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Deleting a Customer


Open the customer you want to delete and then click **Delete Company**. A warning message will be displayed asking if you are sure you want to permanently delete this record. Click **OK**.



Contacts

The Contacts feature allows you to have all of your customer's contact information stored and accessible at anytime.

Adding a Contact

1. Point to **Add** on the main menu, and then click **Contact**
2. Fill out the Contact Information:
 - a. If the contact belongs to a company already in the system, click the  to insert it
3. Fill out the Mailing Address
4. Click **Submit**


*Note: Only First and Last Name are required to move forward. You will have an opportunity to fill the other information in.

Searching for a Contact

1. Point to **Search** on the main toolbar, and then click **Contacts**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Contacts** to show all.
3. To view a contact, click **View** in the search results

Editing a Contact

There are four tabs that allow you to edit information within a bid.

1. Main – Click the  to add a company or a supplier
2. Phone Numbers – Add additional contact numbers
3. Mailing Address
4. Additional Notes

When finished, click **Save** or **Save and Return**.


Deleting a Contact

Open the bid you want to delete and then click **Delete Contact**. A warning message will be displayed asking if you are sure you want to permanently delete this contact. Click **OK**.

Resources

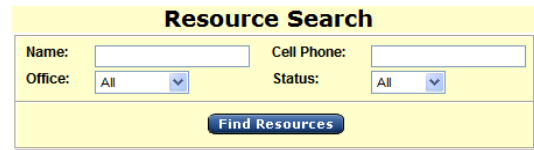
Resources can include your employees or your equipment.

Adding a Resource

1. Point to **Add** on the main menu, and then click **Resource**.
2. Fill out the Resource Information. Pay Type can be Hourly, Salary, or Subcontractor. If the resource belongs to a company, click the  to insert the company.
3. Click **Submit**.

Searching for a Resource

1. Point to **Search** on the main toolbar, and then click **Resources**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Resources** to show all.
3. To view a resource, click **View** in the search results.



Resource Search

Name: Cell Phone:

Office: Status:

Find Resources

Editing a Resource

There are three tabs that allow you to edit information within a bid.

1. **Main** – Allows you to change the basic information of a resource. **Calendar Color** is the color this resource will be displayed on the Job Calendar.
2. **Phone Numbers** – Add resources phone number.
3. **Home Address**

When finished, click **Save** or **Save and Return**.



Resource: Tim Maltba

Save Save and Return Cancel Delete Resource

Main Phone Numbers Home Address

Associated To:

Company:

Office:

Pay Type:

First Name:

Last Name:

Title:

Status:

Email:

Notes:

Calendar Color:

More...

Deleting a Resource



Open the resource you want you to delete and then click **Delete Resource**. A warning message will be displayed asking if you are sure you want to permanently delete this resource. Click **OK**.




Resource: Tim Maltba

Save Save and Return Cancel Delete Resource

Time Entry – Daily

This feature allows you to enter the time of your resources day by day. Point to **Entry** and click **Time Entry – Daily**. Click the  to select a day to enter time. Click **Submit**. Under the Job tab click the  to choose the job this resource worked on. Enter the hours into the Hours field, and the Rate at which they get paid. If you need to add an additional job or pay for this day, click **Add Row** next to that person’s name.


Information Request

Enter the work date: 




Submit



Time Entry for : 10/17/2008

Print Refresh



Last Name ▲	First Name ▲	Job ▲	Hours ▲	Rate ▲	Total ▲	▲
Haynes	Carl	None 	0			Add Row

Time Entry – Weekly

This feature allows you to enter the time of your resources by week. Point to **Entry** and click **Time Entry – Weekly**. Click the  to select a different week. Click **Go**. Click the day that you want to enter time for. Click the  to choose the job this resource worked on. Enter the hours into the Hours field, and the Rate at which they get paid. If you need to add an additional job or pay for a resource for this week, click  next to that person’s name. When finished click **Close Window** in the upper right corner.

Time Entry Close Window
 ◀ Week Of 10/6/2008 ▶
 Go To Week Of: 10/6/2008  

Click a row to edit. Changes will be saved automatically.

Resource	Monday 10/6/2008	Tuesday 10/7/2008	Wednesday 10/8/2008	Thursday 10/9/2008	Friday 10/10/2008	Saturday 10/11/2008	Sunday 10/12/2008	Total
Carl Haynes	0.00	Add	0.00	Add	Add	Add	Add	0.00 
Jesus Rigi	0.00	Add	0.00	Add	Add	Add	Add	0.00 

Suppliers

The Suppliers feature allows you to organize which items belong to which suppliers so that you are always able to order what you need when you need it.

Adding a Supplier

1. Point to **Add** on the main menu, and then click **Supplier**
2. Fill out the supplier’s name
3. Click **Submit**

Add New Supplier

Name:

Submit

Searching for a Supplier

1. Point to **Search** on the main toolbar, and then click **Suppliers**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Suppliers** to show all.
3. To view a supplier, click **View** in search results.

Supplier Search

Supplier Name: City:

Phone: Fax:

Category: Internal Supplier:

Find Suppliers

Editing a Supplier

There are four tabs that allow you to edit information within a bid.

1. Main -- This tab contains the basic information about a supplier
 - a. Internal Supplier – Some customers of JobPro™ use an internal supplier for items that are stocked in inventory.
2. Supplier Address – This tab contains the mailing address of the supplier
3. Contacts – This tab lists all contacts associated with the supplier. Click **Add Contact** to add an additional contact

Supplier: Austin Insulation

Save Save and Return Cancel Delete Supplier

Main Supplier Address Contacts Items Purchase Orders

Active:

Category:

Quality Rating:

Internal Supplier:

Supplier Discount: Trade Price Adjustment:

Fax:

Phone: Phone 2:

Website:

E-Mail:

Account No:

Tax ID No:

Terms:

1099 Type:

Notes:

More...

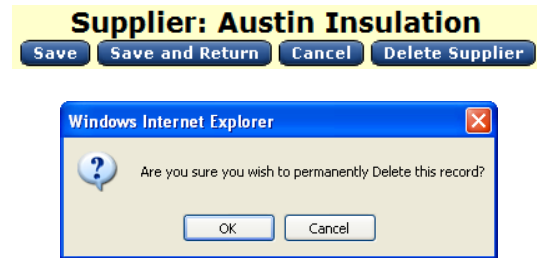
4. Items – This tab lists the cost of each item that this supplier provides. The default price and calculated markup is displayed for each item. Click **Add Supplier Item** to link an additional item and set the supplier cost
5. Purchase Orders – Displays current and past purchase orders for this supplier. The associated job is shown on the grid as well.



When finished, click **Save** or **Save and Return**.

Deleting a Supplier

Open the supplier you want to delete and then click **Delete Supplier**. A warning message will be displayed asking if you are sure you want to permanently delete this supplier. Click **OK**.



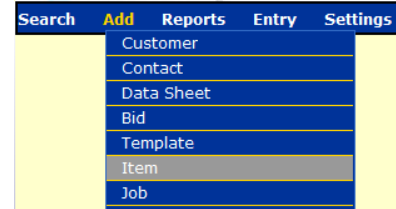
Items

Items are the products you have available in inventory and are able to sell.

Adding an Item

1. Point to **Add** on the main menu, and then click **Item**.
2. Fill out the Item Information
 - a. Item Name – Must be unique to each different item.
 - b. Description – Brief information about the item.
 - c. Cost – Enter the default dollar amount per unit that will be used on the bid worksheet.
 - d. Category – Specify which category this item belongs under (see information on configuring [item category](#)).
 - e. Item Type – Specify which type this item belongs to (see information on configuring [item type](#)).
 - f. Item Status – Specify what status the item is in (see information on configuring [item status](#)).
 - g. Supplier – Set the default supplier of this item.
3. Click **Submit**.

*Note: Only Item Name and Item Type are required to move forward. You will have an opportunity to fill the other information in.



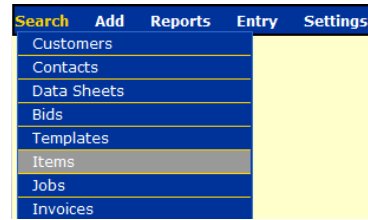
 A screenshot of a web form titled 'Information Request'. The form is on a yellow background and contains the following fields:

- Item Name:
- Description:
- Cost:
- Category:
- Item Type:
- Item Status:
- Supplier:

 At the bottom right of the form is a blue 'Submit' button.

Searching for an Item

1. Point to **Search** on the main toolbar, and then click **Items**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Items** to show all.
3. To view a customer, click **View** in search results.





The 'Item Search' form includes the following fields and controls:

- Item Name:
- Category: All (dropdown)
- Supplier: All (dropdown)
- Type: All (dropdown)
- Description:
- Status: All (dropdown)
- Office: All (dropdown)
- Buttons: Find Items, Save

Editing or Deleting an Item

To edit or delete an item, its cost, the category or type it is listed under, follow these steps:

1. [Search](#) for the item.
2. To edit an existing item, simply type over it or change the drop-down text boxes, then click **Save**. To delete an item, click the , then click **Save**.
3. If a  is shown, the item is already in use and unable to be deleted.

The screenshot shows the 'Item Search' form at the top. Below it is a table with the following columns: Name, Description, Acct. Item, Cost, Yield, DR, Volume, Category, Supplier, Item Type, Status, Uses, Multiplier, and a set of navigation icons. The first row of data is: 'Crawl Poly installation', 'Install 6mil poly on Crawl Space floor', '21a', '0.25', and 'Vapor Barrier'.

Inventory Entry

Inventory Entry allows you to easily track what you have in inventory. When a shipment arrives, you can open inventory entry to easily track what you have received.

1. Point to Entry and then click **Inventory Entry**.
2. All of you available items will be listed on the left. Click on which items have arrived to move them to the right, then click the quantity you have received.
3. Click **Done** when finished.
4. If you need to remove and item, click **Remove** next to the quantity.

The 'Options: Inventory Entry' screen features a 'Refresh' button and a 'Done' button. It displays a list of items on the left and a table on the right. The table has columns for 'Item', 'Quantity To Add', and 'Remove'. The items listed are: '1 1/4 black self tapping (screws)-1 box' and '1 1/4" black self tapping screws (screws) (master box)'. The 'Quantity To Add' column shows '00' for both items.

When finished, click **Save** or **Save and Return**.

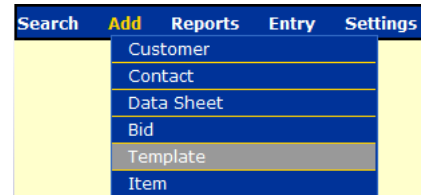
Templates

Templates are used to make the bid worksheet easier to use by having preset items plugged in for different types of jobs.

Adding a Template

1. Point to **Add** on the main menu, and then click **Template**.
2. Fill out the Template Information
 - a. Template Name – Must be unique to each template
 - b. Description – Brief information about the template
 - c. Category – Specify which category this item belongs under (see information on configuring [item category](#))
3. Click **Submit**

*Note: Only the template name is required to move forward. You will have an opportunity to fill the other information in.



Information Request

TEMPLATE INFORMATION:

Enter Template Name:

Enter Description:

Category:

Searching for a Template

1. Point to **Search** on the main toolbar, and then click **Templates**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Templates** to show all.
3. To view a template, click **View** in search results

Template Search

Template #:

Template Name:

Description:

Category:

Editing a Template

There are three tabs that allow you to edit information displayed within the template.

1. General – Allows you to edit the basic information about the template.
 - a. Starter Templates will appear on the add bids screen and convert datasheet to bid screen. This allows the template to be selected by default. When this field is set to “no” the template must be manually imported.
2. Template – Allows you to add or subtract items included within the template.
 - a. Items you have entered are displayed on the left. To add a new item, click **New Item** and refer to [Adding an Item](#).
 - b. You can enter the default measurements/quantity and override the default price if desired.
 - c. The items you have added to the template are displayed on the right. To remove an item, click the **X**.
 - d. The **Create Option** button allows you to.
3. Bids Using Template – Displays the bids where this template is currently in use.

When finished, click **Save** or **Save and Return**.

Template: Insulation template
 Save Save and Return Cancel Delete Template

Copy Template

General Template Bids Using Template

Name: Insulation template
 Description: Template used for insulation bids
 Notes:
 Category: Insulation
 Starter Template: Yes

Template: Insulation template
 Save Save and Return Cancel Delete Template

Copy Template

General Template Bids Using Template

New Item

Filter List: All 44 items found

Item Description	Quantity	Cost	Total Cost	Item Category	Order
Apply @ 2.5" nominal					
Apply @ 2.5" nominal R13					
Apply @ 2" nominal					
Apply @ 2" nominal sound abatement					
Apply @ 3.5" nominal R13 (unvented)					
Apply @ 4" nominal R13					
Apply @ 3" nominal R19					
Apply @ 5.5" nominal R20 (unvented)					
Apply @ 5.5" nominal in wall studs					
Apply @ 5.5" nominal R30					

Create Option

Item Description: 5.5" nominal R20 (unvented)
 Quantity: X X
 Cost: 5.00
 Total Cost: 1000.00
 Item Category: Insulation
 Order: 2

Deleting a Template

Open the data sheet you want to delete and then click **Delete Template**. A warning message will be displayed asking if you are sure you want to permanently delete this template. Click **OK**.

Template: Insulation template
 Save Save and Return Cancel Delete Template

Windows Internet Explorer


Are you sure you wish to permanently Delete this template?

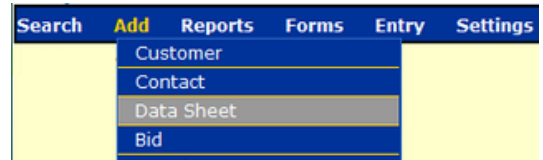
OK Cancel

Data Sheets

Data sheets are used to collect information about a potential bid or job before it is created.

Adding a Data Sheet

1. Point to **Add** on the main menu, and then click **Data Sheet**.
2. Fill out the Data Sheet Information:
 - b. The Data Sheet Name should be unique to each individual entry. A good way to do this is by listing the name of the job and the address, i.e. Smith, John – 123 Second Street.
 - c. If the customer already exists in your database you can click the  to insert it. If they do not already exist, you can fill in the new customer form at the bottom of the page.
 - d. Set the priority of the Job.
 - e. Select which office it pertains to.
 - f. Assign a Salesperson.
 - g. Select a referral source.
3. Fill out the Job Information
 - h. The first textbox allows you to explain what the job entails and will be displayed on the Job and Bid worksheets.
 - i. The next textbox allows you to communicate to the installer any special instructions which are displayed on the Job and Bid worksheets.
4. Fill out the Job Location
5. Fill out Customer Billing Information.



Information Request

Submit

DATA SHEET INFORMATION:
Enter Data Sheet Name:

Note: For new customers, complete the new customer section below.

Customer: 

Priority:

Office:

Assigned To:

Referral Source:

JOB INFORMATION:

What is the problem or what does the customer want?

Special Instructions to Installers:

JOB LOCATION:

Job Address1:

Job Address2:

City:

State:

Zip:

Job Notes:

- a. If the billing information is the same as the job location from above, select **Copy from Job Location**.
 - b. Fill out the Contact Information.
6. Click **Submit**

*Note: Only Data Sheet Name is required to move forward. You will have an opportunity to fill the other text boxes in.

Searching for a Data Sheet

1. Point to **Search** on the main toolbar, and then click **Data Sheets**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Data Sheets** to show all. Refer to [Adding a Data Sheet](#) for **Add Data Sheet** button.
3. To view a data sheet, click **View** in search results.

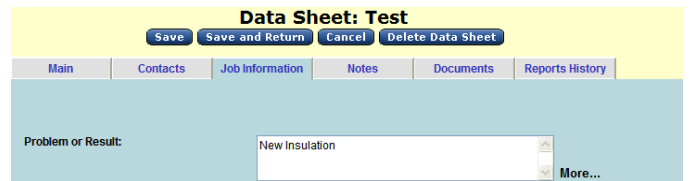
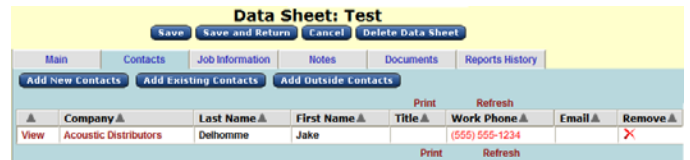
Editing a Data Sheet

There are six tabs that allow you to edit information displayed within the data sheet.

1. Main – Allows you to create a bid or a job. Click **Create Bid** to continue to the bid screen, or click **Create Job** to begin filling out the job sheet. You can also **Print Data Sheet** or **Change Data Sheet Name** from this tab.
 - a. Next Call Date – When a date is entered here, the salesperson will receive an alert notifying them to follow-up on this datasheet. A notification alert is sent via email along with an alert displayed on your JobPro™ homepage.
 - b. Bid – The bid name will be displayed here once you have created it.

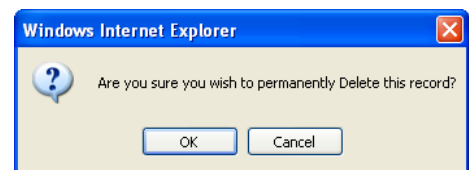
- c. Job – The job name will be displayed here once you have created it.
- 2. Contacts – Allows you to view contacts associated with this data sheet.
 - d. **Add New Contacts** – (See information about adding a contact).
 - e. **Add Existing Contacts** – Allows you to add a contact already listed under this customer.
 - f. **Add Outside Contacts** – Allows you to add a contact listed under a different customer.
- 3. Job Information – Allows you to add any special notes or instructions regarding the job.
 - a. The field labels that appear are configurable using the Configure System Settings page.
- 4. Notes – (See [notes](#) tab).
- 5. Documents – (See [documents](#) tab).
- 6. Reports History – Displays all reports that are generated from this datasheet. Use **X** to delete a report from the history.

When finished, click **Save** or **Save and Return**.



Deleting a Data Sheet



Open the data sheet you want to delete and then click **Delete Data Sheet**. A warning message will be displayed asking if you are sure you want to permanently delete this record. Click **OK**.



Bids

The Bid worksheet allows you to begin proposing an offer of services to your customer.

Adding a Bid

1. Point to **Add** on the main menu, and then click **Bid**.
2. Fill out the Bid Information:
 - a. The Bid Name should be unique to each individual entry. A good way to do this is by listing the name of the job and the address, i.e. Smith, John – 123 Second Street.
 - b. Enter an Estimated Job Start Date by clicking the  and choosing a date on the calendar.
 - c. Select which office it pertains to.
 - d. Select a Template* to begin with.
 - e. If the customer already exists in your database you can click the  to insert it. If they do not already exist, you can fill in the new customer form below.
 - f. Fill out the Customer Billing Information.
3. Click **Submit**.

* Note: Only Bid Name is required to move forward. You will an opportunity to fill the other text boxes in later.

Searching for a Bid

1. Point to **Search** on the main toolbar, and then click **Bids**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Bids** to show all.
3. To view a bid, click **View** in search results

Editing a Bid

There are seven tabs that allow you to edit information within a bid.

1. Bid Information – Click **Create Job** to begin filling out the job sheet. To make a revision to the bid, click **Revise Bid**. To create a change order, click **Create Change Order Job**. To create a services bid, click **Create Service Bid**.
 - a. Status – i.e. In development, Accepted, Rejected
 - b. Priority – i.e. Normal, High, Emergency
 - c. Referral Source – How your customer heard about you
 - d. Estimated Duration – Set an estimated length for job
 - e. Date Submitted – Date the bid was submitted to the customer
 - f. Estimated Job Start Date – Expected job start date
 - g. Next Call Date – When a date is entered here, the salesperson will receive an alert notifying them to follow-up on this datasheet. . A notification alert is sent via email along with an alert displayed on your JobPro™ homepage.
2. Contacts – (See information about [contacts](#) tab)

Bid Worksheet

This tab allows you to add any items that will be included in the job.

The Bid Total is displayed at the top of the screen. Also along the top of the screen are six buttons that you may need to use:

Import Template – You can import a new template of items for different kinds of jobs. Refer to [Adding a Template](#).

New Item – Refer to [Adding an Item](#).

Customer Proposal – Generates the custom proposal created for your organization.

Print Detailed Proposal – Puts the items and total costs into a printable PDF.

To add an item to the bid, select it from the Available Items pane on the left side of the screen. You can also search for a specific item in the list or filter by Item Category.

Once you have chosen an item it will appear to the right on the worksheet. Enter the amount of each item you will need for the job. The calculations for total cost and volume, if applicable, will be done for you. Included in the Total Cost is any applicable tax or markup. You can enter information into the Bid Details textbox, which will be displayed on the customer’s bid proposal, or enter information under Job Details, which will show up on the Job Work Order. Click **Edit** to show a larger textbox that can be edited. Click **X** to delete an item from the worksheet.

The View pane to the lower left allows you to look at the price breakdown. You can highlight an item to view how the items are being priced together.

Along the bottom you can add Additional Specs and include a Tax Rate Override or a Markup Override for the items. For an 8% Tax Rate you would input 0.08. For a 20% Markup, enter 1.20. The factors supersede any tax or markup you may have previously entered.

Item	Base	Length X Width	Quantity	Cost/Sq Ft	Total Cost	Bid Details	Job Details
1" Clear Glass		1' X	1	3.12	0.00		
8 x 4 Plywood			1	24.50	24.50		
Consultation		Hours	1	90.00	90.00		
Drawings			1	80.00	80.00		
Installation			1	75.00	75.00		
Mileage		Miles X # Roundtrips	1	0.49	0.00		
					Tax (7.50%)	0.00	
Total Base						269.50	

Template View	Category View	Update
		<u>Total Cost</u>
Glass		\$0.00
Hardware		\$24.50
Labor & Misc		\$245.00
Grand Total		\$269.50
Bid Total: \$0.00		

3. Notes – (See information about [notes](#) tab).
4. Documents – (See information about [documents](#) tab).
5. Related Bids – Bids attached to this file
6. Reports History – (See information about [reports history](#) tab)

When finished, click **Save** or **Save and Return**.

Deleting a Bid





Open the bid you want to delete and then click **Delete Bid**. A warning message will be displayed asking if you are sure you want to permanently delete this bid. Click **OK**.



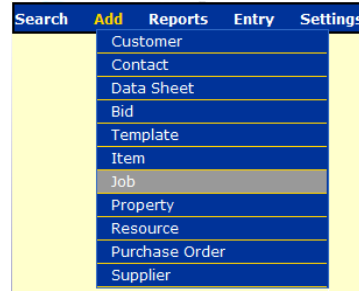
Jobs

The Job worksheet allows you to track all of the completed work on a project.


Adding a Job

1. Point to **Add** on the main menu, and then click **Job**.
2. Fill out the Job Information:
 - a. The Job Name should be unique to each individual entry. A good way to do this is by listing the name of the job and the address, i.e. Smith, John – 123 Second Street.
 - b. Select the Job Type from the drop down list.
 - c. Enter an Estimated Job Start Date by clicking the  and choosing a date on the calendar.
 - d. Enter a Promised Job Start Date by clicking the  and choosing a date on the calendar.
 - e. Select which office the job will be tracked by.
 - f. Select the primary and secondary salesperson in charge.
 - g. If the customer already exists in your database you can click the  to insert it. If they do not already exist, you can fill in the new customer form below and their contact information.
 - h. Click the  to insert the bid.
3. Click **Submit**

* Note: Only Job Name is required to move forward. You will have an opportunity to fill the other text boxes in later.



A screenshot of the 'Information Request' form. At the top, there is a 'Submit' button. Below it, the section is titled 'JOB INFORMATION:'. The form contains the following fields:

- Enter Job Name: [text input]
- Job Type: [dropdown menu]
- Priority: [dropdown menu, currently set to '1-Emergency']
- Start Date: [calendar icon]
- Date Promised: [calendar icon]
- Office: [dropdown menu, currently set to 'Mooresville']
- Assigned To:
 - Primary: [dropdown menu, currently set to 'Haynes, Carl']
 - Secondary: [dropdown menu, currently set to 'Haynes, Carl']
- Customer: [None] 
- Bid: [None] 

A screenshot of the 'NEW CUSTOMER' form. It contains the following fields:

- Enter Company Name: [text input]
- Category: [dropdown menu]
- Contact Information:
 - First Name: [text input]
 - Last Name: [text input]
 - Title: [text input]
 - Work Phone: [text input]
 - Cell Phone: [text input]


 At the bottom of the form is a 'Submit' button.

Searching for a Job

1. Point to **Search** on the main toolbar, and then click **Jobs**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Jobs** to show all.
3. To view a job, click **View** in search results

Editing a Job

There are seven tabs that allow you to edit information within a job.

1. Job Information – Basic information about job displayed.
2. Contacts – (See information about [contacts](#) tab).
3. Assigned To – Assign which resources will be working on this job.
4. Job Processing – (See information about [creating an invoice](#)).
5. Change Orders – A change order is used to adjust the material priced for on a bid. Click **Add Change Order Bid** and refer to [editing a bid](#).
6. Purchase Orders – (See information about [adding a purchase order](#))
7. Scheduling – Include estimated and actual start and end dates. Click the  to insert a date.
8. Cost Analysis – Allows you to view projected and actual costs of a job.
9. Notes – (See information about [notes](#) tab).
10. Documents – (See information about [documents](#) tab).
11. Reports History – (See information about [reports history](#) tab).

Job Materials [Link Job](#)

Check All/Uncheck All	Job Details	Hours	Quoted	Quoted Price	Invoice
<input type="checkbox"/>	Labor	3	Quoted	270.00	No
<input type="checkbox"/>	Material (Cost)	Length 2' Width	Quoted		Invoice
<input type="checkbox"/>	Fiberglass	8' x 4'	Quoted	120.40	No
<input type="checkbox"/>	Milage	Miles: 2 # Roundtrips	Quoted		Invoice
<input type="checkbox"/>	Milage	10.34	Quoted	19.00	No

Job Information [Contacts](#) [Assigned To](#) [Job Processing](#) [Change Orders](#) [Purchase Orders](#) [Scheduling](#) [Cost Analysis](#)

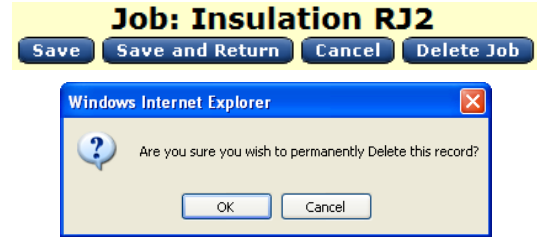
[Refresh](#)

Quoted Sets:	5.000	Actual Sets Used:	3.00000	Sets +/-:	2.00000
Category	Quoted Price	Quoted Price/Set	Projected Commission	Actual Price/Set	Actual Commission
Set Items	11,860.00	\$2,343.08	130.20	\$3,905.13	351.46
Fiberglass	4,427.80		221.39		221.39
Job Grand Total	\$ 13,000.00		\$1,000.00		\$700.00

When finished, click **Save** or **Save and Return**.

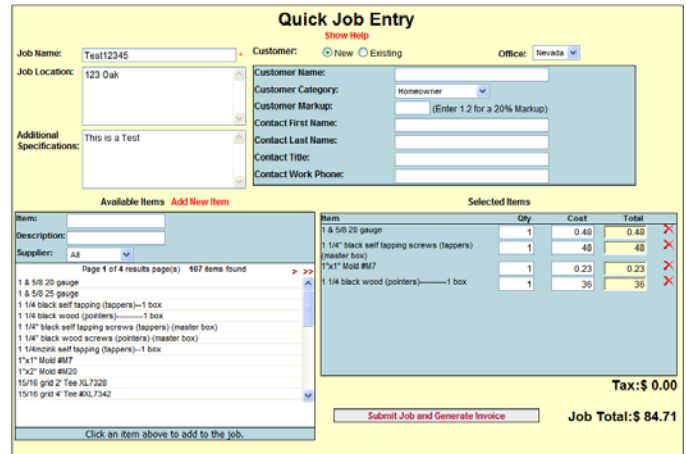
Deleting a Job

Open the job you want to delete and then click **Delete Job**. A warning message will be displayed asking if you are sure you want to permanently delete this record. Click **OK**.



Quick Jobs



Quick Jobs entry allows you to create a job and invoice it immediately. This is useful if customers visit your showroom or warehouse and buy products directly. Quick Jobs can be viewed as a Point of Sale system that allow you to simply pick what items are being purchased and generate an invoice/receipt. Start by entering the Job Name and Location. The Job Name can be just the customer's name and maybe the current date. Then specify whether this job is with a new customer or one that already exists in your system. Now add the items that the job requires and fill out the information in the Selected Items pane. Click 'Show Help' on the screen for additional instructions on how to use Quick Jobs. Click **Submit Job and Generate Invoice**. Refer to [Editing an Invoice](#).

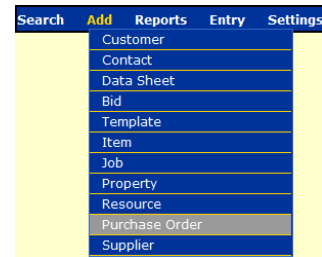


Purchase Orders




Purchase Orders allow you to keep track of what items you have bought from your suppliers.

Adding a Purchase Order

1. Point to **Add** on the main menu, then click **Purchase Order**
2. Fill out the Purchase Order Information
 - a. Job – Click the  to insert the corresponding job
 - b. Supplier – Click the  to insert the corresponding supplier
 - c. FOB – Freight on Board, shipping point or destination
 - d. VIA – Insert Shipping Method
 - e. Terms – Conditions or Terms for purchase order.
 - f. Date Required – The date materials are required to arrive.
3. Click **Submit**



The 'Information Request' form is titled 'PURCHASE ORDER INFORMATION'. It contains the following fields:





- Job: None 
- Supplier: None 
- FOB:
- VIA:
- Terms:
- Date Required: 

 A 'Submit' button is located at the bottom right of the form.

Searching for a Purchase Order

1. Point to **Search** on the main toolbar, and then click **Purchase Orders**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Purchase Order** to show all.
3. To view a purchase order, click **View** in search results.

The 'Purchase Order Search' form includes the following search criteria:

- PO #:
- Supplier Name:
- Date:
- Office: 
- PO Types: 
- Job Name:
- Job Location:
- Ordered By: 
- Status: 

 A 'Find Purchase Orders' button is located at the bottom center of the form.

Editing a Purchase Order

There are five tabs that allow you to edit information within a job.

1. Main – Allows you to **Print Purchase Order**
 - a. Invoice Number – Corresponding number to purchase order
 - b. See [Adding a Purchase Order](#) for last half
2. Items – Displays purchased items. To add another item to the order, click **Add Purchase Order Item**
 - a. To delete an item from purchase, click the **X**
3. Notes – (See information about [notes](#) tab)
4. Documents – (See information about [documents](#) tab)
5. Reports History – (See information about [reports history](#) tab)

When finished, click **Save** or **Save and Return**.

Quantity	Name	Price	Total
1	Consultation	\$200	\$200

Deleting a Purchase Order

Open the job you want to delete and then click **Delete Purchase Order**. A warning message will be displayed asking if you are sure you want to permanently delete this purchase order. Click **OK**.

Invoices

The Invoice feature allows you to set up a bill for your customers, clearly showing the products, quantities and prices previously agreed on.

Creating an Invoice

Locate the job you wish to create an invoice for by [Searching for a Job](#). Once on the jobs main page, click the **Job Processing** tab. You can choose to invoice part or all of the items assigned to the job. After choosing which items click **Complete Checked Items**. An invoice will be generated under the Job Invoices tab. Click **View** to be redirected to the invoices main screen and refer to [Editing an Invoice](#).

Job Materials		Linked/Return Jobs		Quoted		
Material	Job Details	Quantity	Quoted Price	Invoiced		
<input type="checkbox"/> 8 x 4 Plywood		3	73.50	No		
<input type="checkbox"/> 8 x 4 Plywood		4	98.00	No		
<input type="checkbox"/> RP40338-dummy		1	27.23	No		

Invoices							Print
	Invoice #	Invoice Date	Status	Due Date	Date Paid	Invoice Amt	Amt Paid
View	10069	10/20/2008	New			275	

Searching for an Invoice

1. Point to **Search** on the main toolbar, and then click **Invoices**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Invoices** to show all.
3. To view an invoice, click **View** in search results.

Invoice Search

Inv. No: Job Name:

PO No: Pricing:

Customer: Status:

Invoice Date: Invoice Due Date:

Inv. Amt. From: To: Created By:

Find Invoices

Editing an Invoice

There are three tabs that allow you to edit information within a job.

1. Main – Displays the invoice amount, how much has been paid, and what is due. It also includes all of the pertinent dates, shipping address and shipping method.
2. Items – Displays purchased items. To add another item to the order, click **Add Purchase Order Item**.
 - a. To delete an item from purchase, click the **X**
3. Reports History – (See information about [reports history](#) tab).

When finished, click **Save** or **Save and Return**.

Invoice: 10054
 Save Save and Return Cancel Delete Invoice
 Recalculate Invoice
 Main Items Reports History
 Job: Test 3
 Customer: Acoustic Distributors
 Invoice Amount: 495 Paid: Due: 145
 Status: [v]
 Invoice Date: 10/7/2008 Due Date: Date Paid:
 PO No:
 Ship To: Acoustic Distributors
 3788 Verona Trail
 Salem, VA 24018
 Payment Terms:
 Shipping Method:
 Notes:

Invoice: 10054
 Save Save and Return Cancel Delete Invoice
 Recalculate Invoice
 Main Items Reports History
 Items
 2 Items found

Item #	Qty #	Unit	Price	Refresh	Tax #	Total Amount #
5.5' nominal to wall areas	10	25 x 5.5			495	0
Totals					495	0
					495	495

Deleting an Invoice

Open the invoice you want to delete and then click **Delete Invoice**. A warning message will be displayed asking if you are sure you want to permanently delete this invoice. Click **OK**.

Invoice: 10054
 Save Save and Return Cancel Delete Invoice
 Windows Internet Explorer
 ? Are you sure you wish to permanently delete this invoice?
 OK Cancel

Payments

The Payments function allows you to keep track of what and how much your customers have paid.

Making a Payment

The first step to making a payment is choosing which customer you want to pay. From that customer's main screen, choose the **Invoices/Payments** tab.

1. To add a payment, click **Add Payment**
2. The Add Payment Screen will appear
 - a. Enter the date received and the date listed on the check (if it is a check)
 - b. Choose the payment method from the drop down list
 - c. Enter the check number
 - d. Enter the Payment Amount
 - i. You can enter part or all of the total amount that is listed on the invoice
 - ii. After entering the Payment Amount, click **Auto Apply** to evenly distribute the payment, or click inside the **Apply Amt** text box next to the payment you'd like it to be placed by
 - e. Click **Submit**. A warning screen will appear asking if you are sure you want to add this payment. Click **OK**
 - f. Your payment has been added. Click the close window to return
3. The payment will be displayed as a credit

When finished, click **Save** or **Save and Return**.

Company: Acoustic Distributors

Balance:

Main | Address | Contacts | **Invoices/Payments** | Properties | Jobs | Bids | Data Sheets | Notes | Documents

Add Payment

7 transaction(s) found Excel Print Refresh

Type	ID	Job	Date	Payment Method	Check #	Debit	Credit	Entered By
Invoice	10054	Test 3	10/7/2008			\$495.00		SMCHOLS

Add Payment

Customer: Acoustic Distributors Balance: 495.00

Date Received: Check Date:

Payment Method:

Check Num:

Notes:

Payment Amount:

Outstanding Invoices						
Invoice #	Job	Invoice Date	Amt	Paid	Due	Apply Amt
10054	Test 3	10/7/2008	495.00			<input type="text"/>

Unapplied Amount Remaining:

Payment Amount:

Outstanding Invoices						
Invoice #	Job	Invoice Date	Amt	Paid	Due	Apply Amt
10054	Test 3	10/7/2008	495.00	495.00		<input type="text" value="395.00"/>

Unapplied Amount Remaining:

Type	ID	Job	Date	Payment Method	Check #	Debit	Credit	Entered By
Payment	24		10/14/2008	Check	1234		\$350.00	smchols
Invoice	10054	Test 3	10/7/2008			\$495.00		SMCHOLS

Searching for a Payment

1. Point to **Search** on the main toolbar, and then click **Payments**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Payments** to show all.
3. To view a payment, click **View** in search results.

Editing a Payment

To edit a payment, either [search](#) for the specific payment, or go to the customer it pertains to, choose the Invoices/Payments tab, and click **View** next to the payment you want to edit. There are two tabs to guide you:

1. General – Allows you to edit the data entered when making the payment
 - a. Date Cleared -- Enter the date the check cleared
 - b. Date Deposited – Enter the date the check was deposited
2. Related Invoices – Shows the invoice this payment pertains to and the balance remaining

A.	Invoice # A.	Job A.	Date A.	Total Invoice Amount A.	Amount Applied A.
View	10054	Test 3	10/7/2008	\$435.00	\$350.00


Deleting a Payment

Open the payment you want to delete and then click **Delete Payment**. A warning message will be displayed asking if you are sure you want to permanently delete this purchase order. Click **OK**.



*Note: Invoices that were paid with the deleted payment will be reopened the customer balance will be recalculated

Chapter 3: Reports

Time Summary Report

The Time Summary Report helps you to keep track of how many hours your resources have worked. Point to **Reports** and click **Time Summary Report**. Enter a beginning and ending date by clicking the . Then click **Submit**. A PDF file will be opened and display which resource has worked, the job name, and the total pay for their hours.

Information Request

Date Begin 
 Date End 

Submit

Time Summary Report

10/1/2008 Through 10/31/2008

Work Date	Job Name	Rate Type	Hours	Total Hours	Rate	Total Pay
10/06/2008	Test1	Regular	4	4	25	\$100.00
			4	4		\$100.00
		Totals	4	4		\$100.00

Employee Assignments

Employee Assignments allows you to quickly search when and where resources are being used. Point to **Reports** and click **Employee Assignments**. You can search on any or all of the data options available. When you have finished filling out the desired information, click **Submit**. A PDF file will be opened displaying the results and.

Information Request

Resource:
 Bid Status:
 Job Status:
 Data sheet Status:
 Date Created From: Date Created Through:
 Date Modified From: Date Modified Through:

Submit

Job Schedule

The Job Schedule helps you better assess and keep track of where your time is being spent. It helps project managers better allot their employees time when working on multiple jobs. Clicking **Redraw Schedule** will organize it so the first project will be shown at the top. Click **Full screen View** to have a pop-up window show all of your results. Click **Printable View** for a printer friendly display.

Job Schedule

Main

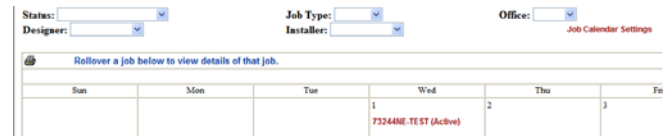
Scale: First day of week:
 Actual Dates Estimated Dates
 From: to:
 Status:
 Sort:

Redraw Schedule **Fullscreen View** **Printable View**

Project	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/27	5/4	5/11	5/18	5/25	6/1	6/8	6/15
Insulation RJ2															
Insulation RJ2 CO B RJ1															

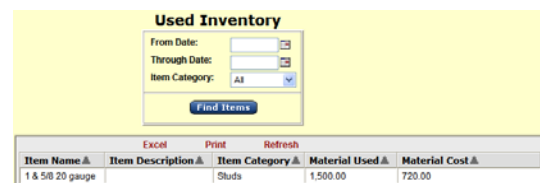
Job Calendar

The Job Calendar displays when and where resources are being used and which jobs they are scheduled to perform. This calendar has color coded information to help you keep track of your resources, making sure resources are available when you need them. Point to **Reports** and click **Job Calendar**. You can filter which information you want to see by using the drop-down boxes at the top of the screen.



Inventory Used

The Inventory Used feature allows you to view every item that you have used up to the date. It shows you the amount used as well as the total cost of each item you have used.



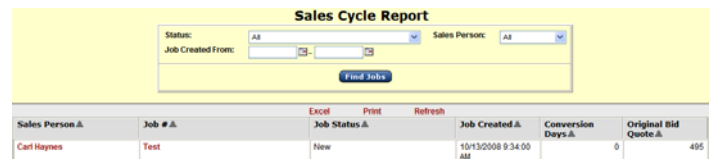
Commissions Report

The Commissions Report shows you each job a salesperson has sold, along with the job total. It automatically calculates the commission based on the commissions rate table defined in the system settings. See [Configuring Commissions Table](#). You can search based on specific criteria or click **Find Jobs** to show all.



Sales Cycle Report

You can search based on specific criteria or click **Find Jobs** to show all.

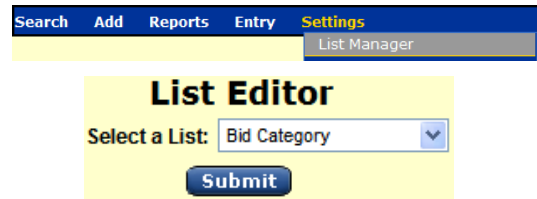


Chapter 4: Configuring the System

This section will be accessed by the System Admin.

List Manager

To access the different options to configure under list manager, point to settings and then click **List Manager**. From the drop down list, choose which option you would like to begin configuring and click **Submit**.



Bid Category

To categorize the different bids in your system you must configure this feature. You can personalize the categories to what best fits your business. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Bid Category			
6 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Insulation install	1	✗	
Energy Star Program	3	✗	

Bid Statuses

The status of a bid is configured here. Examples of bid statuses are in development, quoted, signed, accepted and rejected. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Bid Statuses			
5 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
In Development	0	✗	
Quoted	1	✗	

Company Category

Company categories help you separate the different types of customers you have. Examples of company categories include homeowner, engineer, builder and interior designer. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Company Category			
6 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Homeowner	1	✗	
Builder	2	✗	
Engineer	3	✗	

Contact Category

Contact categories help you separate the different types of contacts you have. Examples include engineer, vendor and landscape architect. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Contact Category

6 record(s) found [Print](#) [Refresh](#)

Value ▲	Display Order ▲	Remove ▲
Homeowner	1	✗
Builder	2	✗
Engineer	3	✗

Data Sheet Status

The status of a data sheet is configured here. Examples of data sheet statuses include new, assigned, pending and closed. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Data Sheet Status

4 record(s) found [Print](#) [Refresh](#)

Value ▲	Display Order ▲	Remove ▲
New	1	✗
Assigned	2	✗
Pending	3	✗
Closed	4	✗

Invoice Statuses

Invoice Status allows you to configure the different stages your invoices go through. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Invoice Statuses

Value ▲	Display Order ▲	Remove ▲
New	99	✗
Paid	99	✗
Past Due	99	✗

[Add New Item](#) [Save](#)

Item Categories

Item categories help you organize which types of items you have by separating them in groups. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Item Categories

4 record(s) found [Print](#) [Refresh](#)

Value ▲	Display Order ▲	Remove ▲
Glass	99	✗
Hardware	99	✗
Labor & Misc	99	✗

Item Status

Item Status is the state of the item within your inventory. Typical Item Statuses include Active and Inactive. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Item Status					
1 record(s) found		Print	Refresh		
Value ▲	Display Order ▲	Color ▲	Remove ▲		
Active	0		✗		

Job Statuses

Job Status allows you to configure the different stages your jobs go through. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Job Statuses					
7 record(s) found			Print	Refresh	
Value ▲	Display Order ▲	Color ▲	Remove ▲		
Pending	1		✗		
Complete Pending Follow-up	2		✗		
Complete	3		✗		

Job Types

Job types help you specify what your employees will be dealing with. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Job Types				
6 record(s) found		Print	Refresh	
Value ▲	Display Order ▲	Remove ▲		
Insulation install	1	✗		
Energy Star Program	3	✗		
HVAC Load	4	✗		

Purchase Order Status

The status of a purchase order is configured here. Examples of purchase order statuses include approved, order received and ready for review. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Purchase Order Status			
5 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Approved	0	✗	
In Development	0	✗	
On Order	0	✗	

Purchase Order Types

Purchase Order Types helps you organize which stage in the process a purchase order is. Examples of Purchase Order Types include Sent to Vendor and Approved. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Purchase Order Status			
5 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Approved	0	✗	
In Development	0	✗	
On Order	0	✗	

Referral Source

The referral source will help you understand where most of your customers are finding your services. Examples of referral sources include print ads and internet searches. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Referral Source			
6 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Print Ad- Urban Magazine	1	✗	
Print Ad- Builder Arch Magazine	2	✗	
Print Ad - Home Magazine	3	✗	

Supplier Categories

A supplier category makes it easier to organize which supplier is being used during jobs and purchase orders. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

List: Supplier Categories			
2 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Austin Insulation	1	✗	
		✗	

2 record(s) found Print Refresh

[Add New Item](#) [Save](#)

Template Categories

Template categories make it easier to organize what types of templates are being used. Examples of template categories include renovation, modification and consultation. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

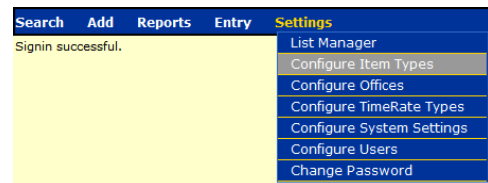
List: Template Categories			
4 record(s) found		Print	Refresh
Value ▲	Display Order ▲	Remove ▲	
Renovation	1	✗	
New Construction	2	✗	
Modification	3	✗	
Consultation	4	✗	

Configuring Item Types

Item types are used to configure the way individual items are priced on the bid worksheet. The quantity labels will appear on the worksheet above each item of that type and setup the formula to calculate the total price for the item. If an item is priced by entering two measurements, i.e. Length X Width, quantity labels 1 and 2 should be used. Quantity 3 label would be left blank in this instance.

To add, edit or delete a type of item or the units of measure labels, follow these steps:

1. Point to **Settings** on the main toolbar, and then click **Configure Item Types**.
2. To edit an existing item type, simply type over it, then click **Save**. To delete an item type, click the **X**, then click **Save**. If there is no **X** the item type is in use and cannot be deleted.
3. To add a new item type, click **Add Item Type**. A new row will be displayed at the bottom.
4. The **Markup Rate*** allows the user to add a percentage markup to the price of a good, i.e. Enter 1.20 for a 20% markup.
5. The **Taxed*** checkbox allows the user to make the item type taxable.
6. When finished click **Save**.



*Note: Certain item types have special formulas associated to them. Be careful when editing item types as they may cause the special formulas to stop working. If you have any questions with the item types currently configured in your system, please call JobPro™ support.

Configuring Offices

To add one or multiple offices use the following instructions. Point to **Settings** on the main menu, and then click **Configure Offices**. Fill out the text boxes. Display order allows you to choose the order the offices are shown on a drop-down list. To delete an office, click the **X**. When finished, click **Save** or **Save and Return**.

#	Name	Address Line 1	Address Line 2	City	State	Zip	Phone Number	Fax Number	Display Order	Delete
1	Nevada	125 Nevada St		Las Vegas	NV	89102			1	X

Configuring TimeRate Types

TimeRates are used to define the types of time employees' use on their timecards. Examples of TimeRates are regular, overtime, prevailing wage, and union. Use an hour multiplier if you wish for the hours to automatically adjust by a certain percentage (i.e. enter 1.5 if overtime hours paid at time and a half). Click **Add TimeRate Type** to add a new row. Click the **X** to delete a row. When finished, click **Save** or **Save and Return**.

#	RateType	Hour Multiplier	Display Order	Delete
1	Regular	1	10	X

Configuring Multipliers

Multipliers allow you to set possible factors for items configured to use multipliers. See search items. The Label column is what is displayed in the multiplier dropdown and the multiplier value is the corresponding factor. Click **Add Multiplier Item** to add a new row. Click the **X** to delete a row. When finished, click **Save** or **Save and Return**.

#	Label	Pitch Value	Remove
1	1712	1.00247	X

Configuring Commissions Table

The commissions table allows you to set uniform commission rates on specific item categories. Click **Add Commissions Item**. A new row will be added. Specify the [Item Category](#), Cost From, Cost Through, and Rate. The Cost From and Cost Through inputs define a price range that an item is sold at. Leave one or both of these values blank for an open ended range. The Rate is the decimal representation of the percentage that is paid to the salesperson.

#	Item Category	Cost From	Cost Through	Rate	Remove
1	Air sealing service	0	1000000	0.05	X

Example: You pay 3% commission on Garage Doors sold at or above \$500 each:

- Item Category: Garage Doors
- Cost From: \$500
- Cost Through: ----
- Rate: 0.03%

Click the **X** to delete a row. When finished, click **Save** or **Save and Return**.

Configuring System Settings

The System Settings allow you to setup the Assignment Labels (labels appearing on the Job Assignment tab), Job Schedule Labels (labels appearing on the Scheduling tab), Data Sheet Job Information Labels (labels appearing on the Datasheet), and the System Defaults. The Tax Rate will be the default tax added to all bids. You can click the checkbox to display the price on all of your Purchase Orders. Proposal Grouping and Work Order Grouping specify what will be printed on each. When finished, click **Save** or **Save and Return**.

Configuring Users

This feature allows you to set up which users will be allowed to view your system. It also allows you to set what kind of user they are which will decide which features they are allowed to see. If you click a person's **User ID** you will be taken to their page. From there you can **Reset Password**, find their contact info, look at their login history and **Delete User**. When finished, click **Save** or **Save and Return**.

User Search Results					
#	User ID	User Type	First Name	Last Name	Last Login Date
1	SysAdmin	SysAdmin	Carl	Haynes	

USER: SysAdmin

Save Save and Return Cancel Delete USER

Profile Contact Info Login History

Reset Password

Invalid Password Count: 0

OrgID: 1006

User Name: SysAdmin Template (Last, First MI)

Restrictions: None

Activity Mode: Production

Information Mode: Standard

Changing Password

To change your password, point to **Settings** and click **Change Password**. You must fill out all three fields to change the password. Your password must be at least 5 characters/digits long.

Change Password

Input is required for all three of these fields to change the password. The password must be at least 5 characters/digits long.

Old Password:

New Password:

Rekey New Password:


Save Changes

Chapter 5: Advanced Topics

Salespeople Bid Security

With this feature enabled, when a salesperson searches for all bids in your system they will see every bid and who it is assigned to, but will only be able to view and edit those bids associated to their username. This is typically beneficial to managers who only want estimators or salespeople to have access to their own bids, but supervisors or a manager access to everything.

Since resources are what bids and datasheets are assigned to you must have some way to establish which username corresponds to a resource. That means each salesperson (resource) must first be assigned to their individual username. To do this, follow these steps:

1. Point to **Search** and click **Resources**.
2. **View** the resource you plan to assign.
3. On the Main tab, click the  next to “Associated To”.
4. A pop-up will display all of the users currently in your system. Choose the corresponding username.

Now that each resource is assigned to a username, you will need to set the “Reports To” feature. “Reports To” sets the hierarchy of who can view what. Typically the hierarchy includes Salespeople report to Sales Managers who report to Owners. This means only salespeople could edit their individual bids, sales managers could view and edit the bids of salespeople reporting to them, and owners could view and edit all bids. To complete this, follow these steps:

1. Point to **Settings** and click **Configure Users**
2. **View** the user.
3. On the Profile tab choose whom the user **Reports To** using the dropdown box.

