JobPro TECHNOLOGY
USER GUIDE

Last Updated on 11/06/2008

www.JobProtech.com

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

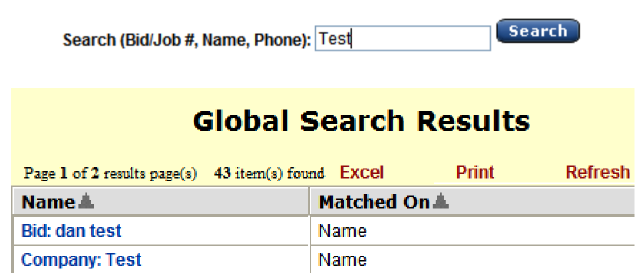
 will refresh the page you are currently viewing

 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**.

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 ✕ 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			

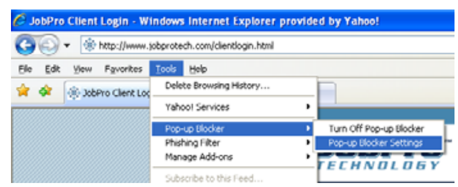
Daily Alerts		
Type	**Description**	
Follow-Up	The bid 'Test 3' has a next call date of 10/01/2008.	✕
Click on an alert to view that datasheet or bid. Use the red 'X' to delete an alert.		

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.

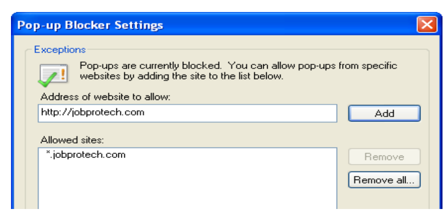
To change the Pop-Up Blocker settings:

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**



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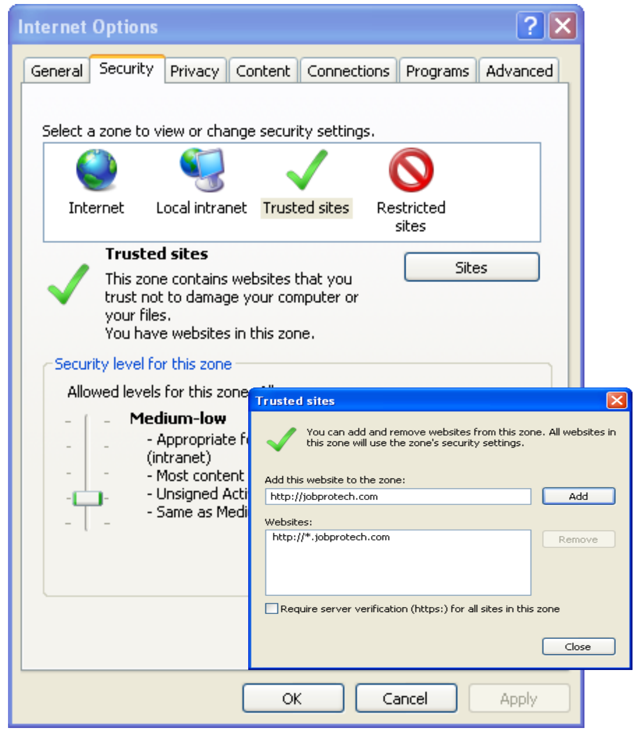
To add JobPro™ to your trusted sites:

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.

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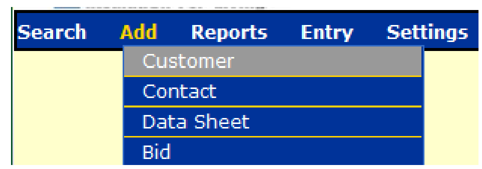
Chapter 2: Entities

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.

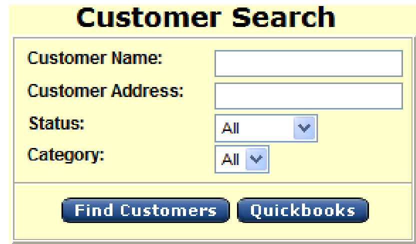


Adding a Customer

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**

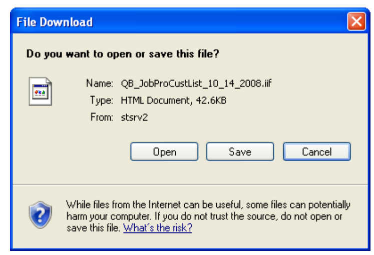
*Note: Only Company name is required to move forward. You will have an opportunity to fill the other text boxes in.

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

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](#).

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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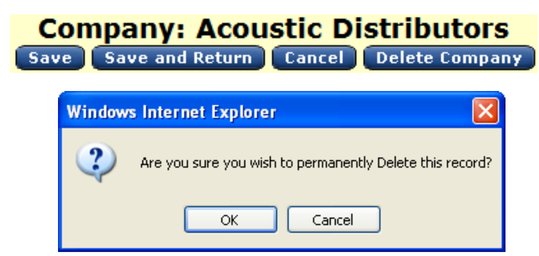
Deleting a Customer

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.

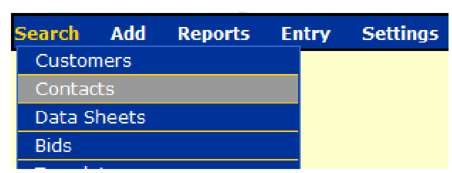
Adding a Contact

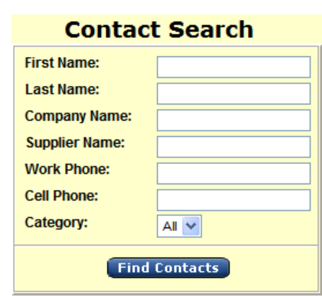
1. Point to **Add** on the main menu, and then click **Contact**
2. Fill out the Contact Information:
    a. If the contact belongs to a company already in the system, click the to insert it
3. Fill out the Mailing Address
4. Click **Submit**

***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

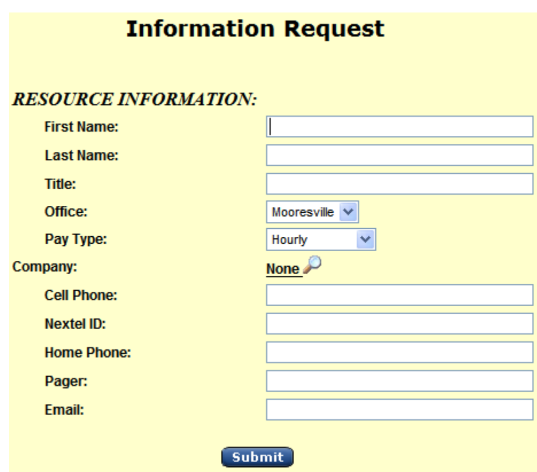
Open the bid you want to delete and then click **Delete Contact**. A warning message will be displayed asking if you are sure you want to permanently delete this contact. Click **OK**.

Resources

Resources can include your employees or your equipment.

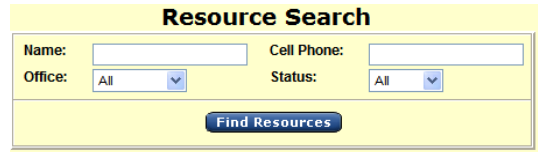
Adding a Resource

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.



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

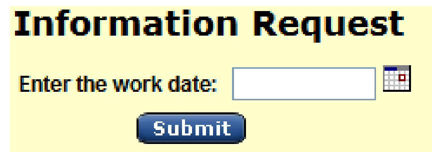
When finished, click **Save** or **Save and Return**.

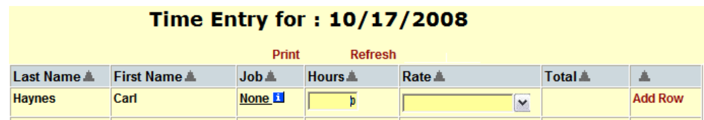
Deleting a Resource

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**.

Time Entry – Daily

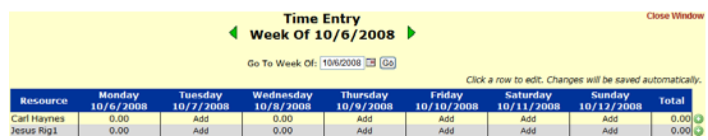
This feature allows you to enter the time of your resources day by day. Point to **Entry** and click **Time Entry – Daily**. Click the to select a day to enter time. Click **Submit**. Under the Job tab click the to choose the job this resource worked on. Enter the hours into the Hours field, and the 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.





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.

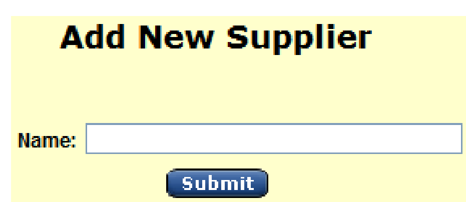


Suppliers

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**



Searching for a Supplier

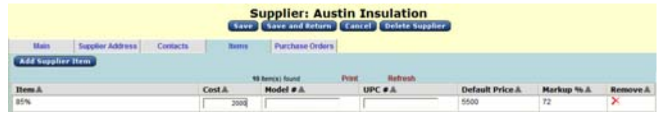
1. Point to **Search** on the main toolbar, and then click **Suppliers**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Suppliers** to show all.
3. To view a supplier, click **View** in search results.

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

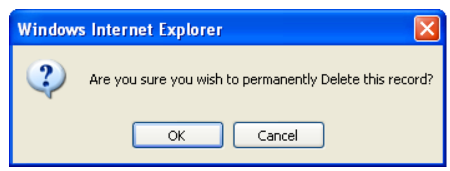
4. Items – This tab lists the cost of each item that this supplier provides. The default price and calculated markup is displayed for each item. Click **Add Supplier Item** to link an additional item and set the supplier cost
5. Purchase Orders – Displays current and past purchase orders for this supplier.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

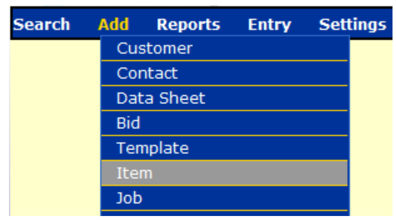


Items

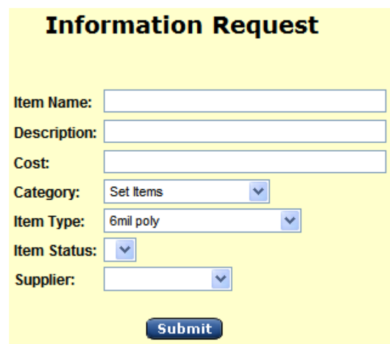
Items are the products you have available in inventory and are able to sell.

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.

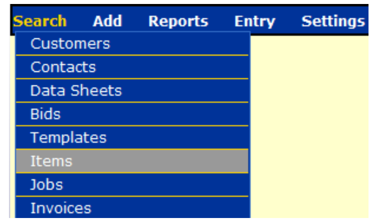


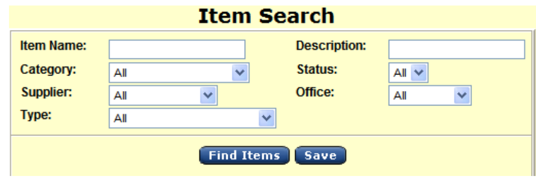
3. Click **Submit**.

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

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.





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.

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.

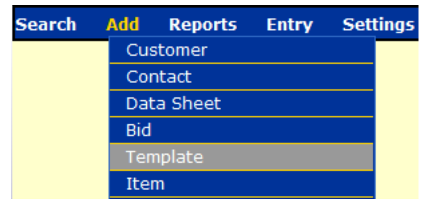
1. Point to Entry and then click **Inventory Entry**.
2. All of you available items will be listed on the left. Click on which items have arrived to move them to the right, then click the quantity you have received.
3. Click **Done** when finished.
4. If you need to remove and item, click **Remove**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

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

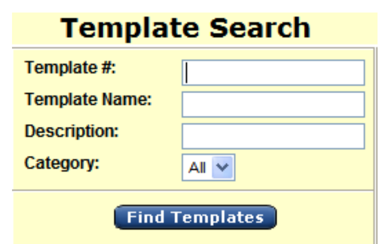


1. Point to **Add** on the main menu, and then click **Template**.
2. Fill out the Template Information
    a. Template Name – Must be unique to each template
    b. Description – Brief information about the template
    c. Category – Specify which category this item belongs under (see information on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

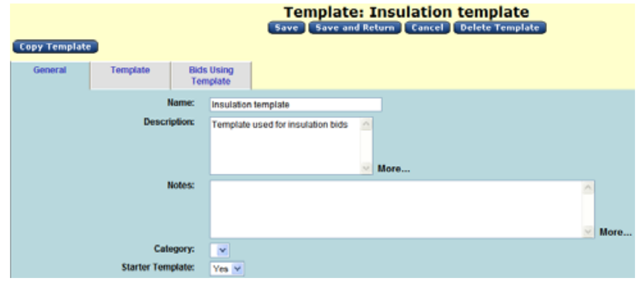
Searching for a Template

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

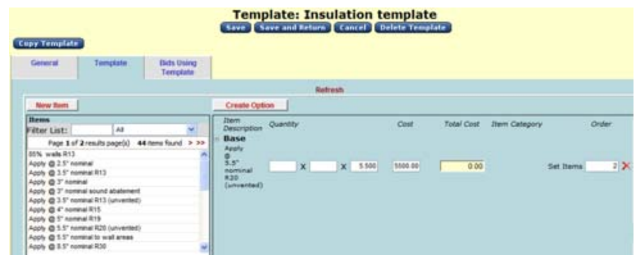


Editing a Template

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



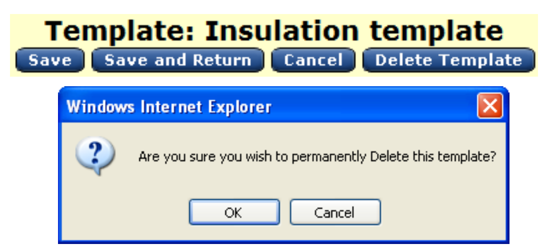
1. General – Allows you to edit the basic information about the template.
    a. Starter Templates will appear on the add bids screen and convert datasheet to bid screen. This allows the template to be selected by default. When this field is set to "no" the template must be manually imported.
2. Template – 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 ✕.
    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**.

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**.

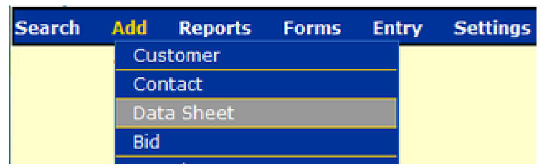


Data Sheets

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.

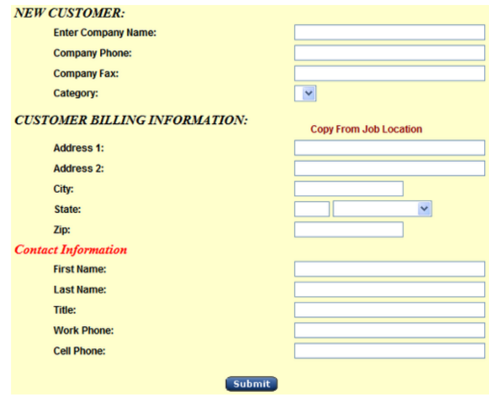
4. Fill out the Job Location
5. Fill out Customer Billing Information.

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.

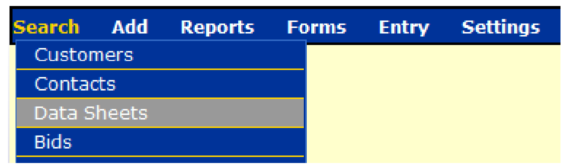


Searching for a Data Sheet

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.



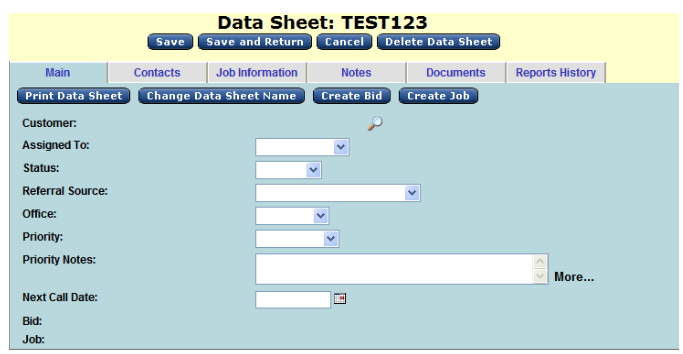
Editing a Data Sheet

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.

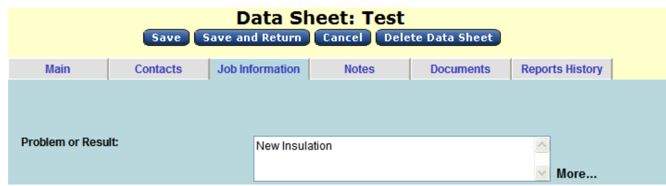
   d. **Add New Contacts** – (See information about adding a contact).

   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).

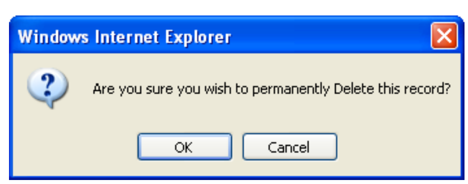
5. Documents – (See [documents](#) tab).

6. Reports History – Displays all reports that are generated from this datasheet. Use ✕ 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**.



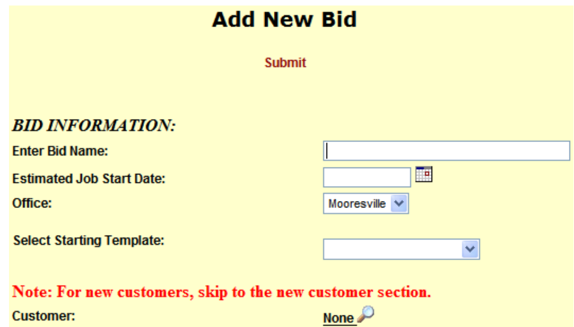
Bids

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

Adding a Bid

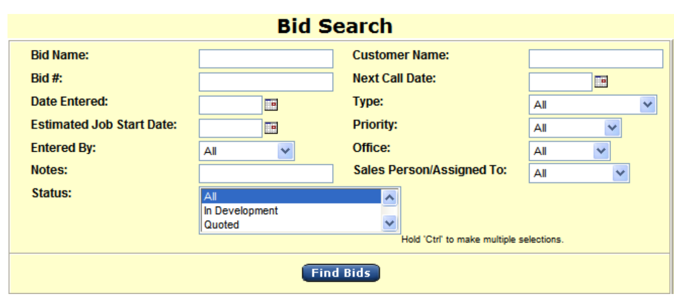
1. Point to **Add** on the main menu, and then click **Bid**.
2. Fill out the Bid Information:
    a. The Bid Name should be unique to each individual entry. A good way to do this is by listing the name of the job and the address, i.e. Smith, John – 123 Second Street.
    b. Enter an Estimated Job Start 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.



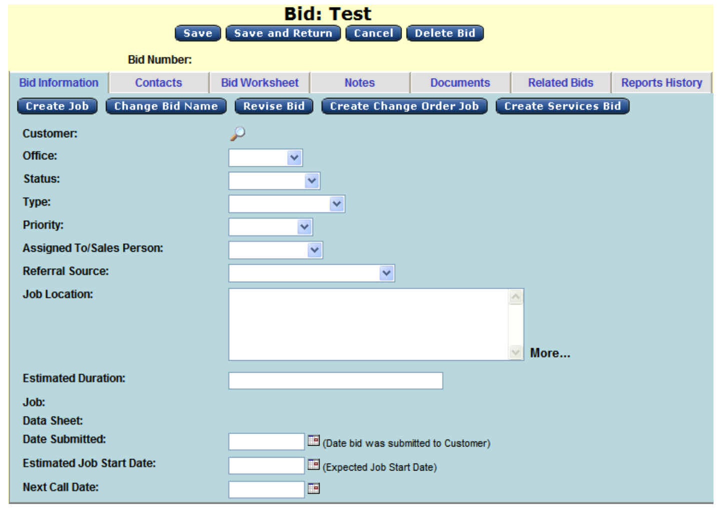
Searching for a Bid

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

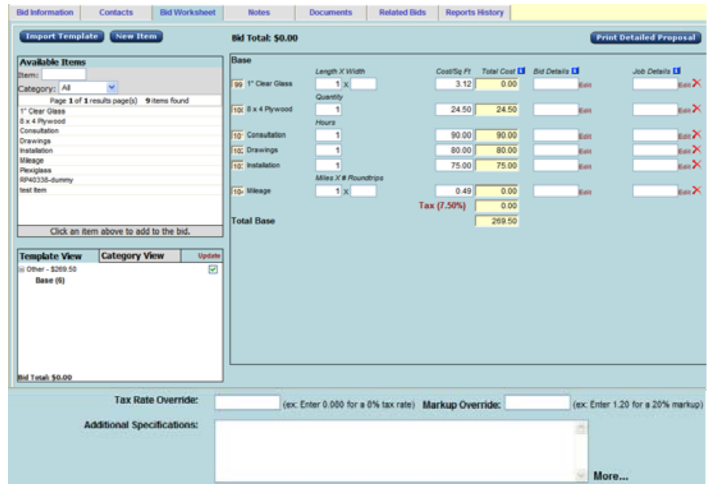
There are seven tabs that allow you to edit information within a bid.



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:

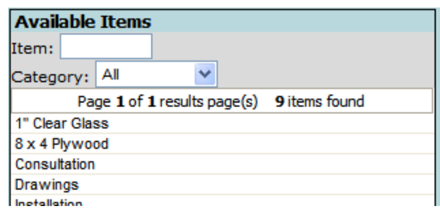
Import Template – You can import a new template of items for different kinds of jobs. Refer to [Adding a Template](#).

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

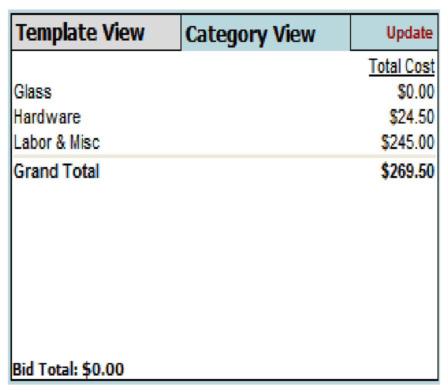
Customer Proposal – Generates the custom proposal created for your organization.

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 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.

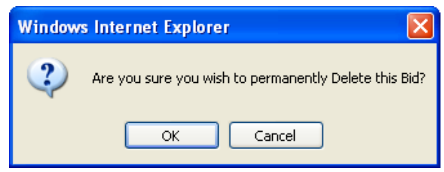
Along the bottom you can add Additional Specs and include a Tax Rate Override or a Markup Override for the items. For an 8% Tax Rate you would input 0.08. For a 20% Markup, enter 1.20. The factors supersede any tax or markup you may have previously entered.

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

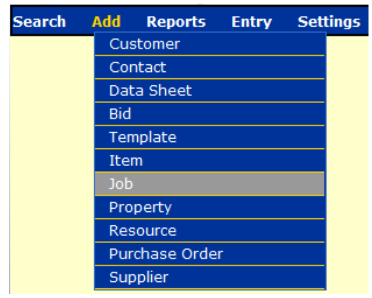
Open the bid you want to delete and then click **Delete Bid**. A warning message will be displayed asking if you are sure you want to permanently delete this bid. Click **OK**.



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.

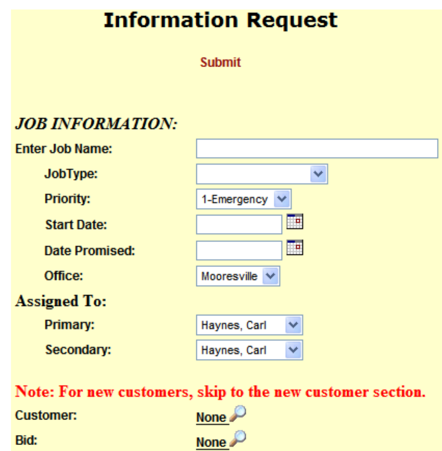
   d. Enter a Promised Job Start Date by clicking the and choosing a date on the calendar.

   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.

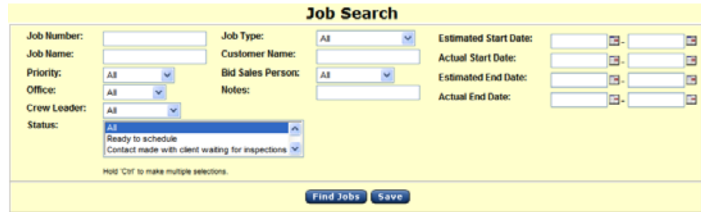
   h. Click the to insert the bid.



3. Click **Submit**

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

Searching for a Job

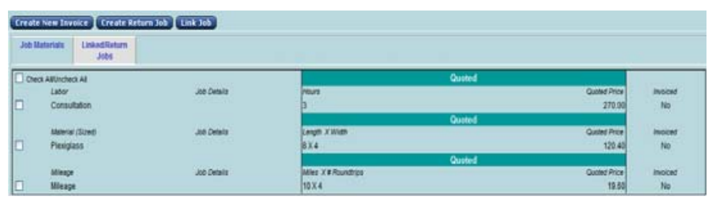


1. Point to **Search** on the main toolbar, and then click **Jobs**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Jobs** to show all.
3. To view a job, click **View** in search results

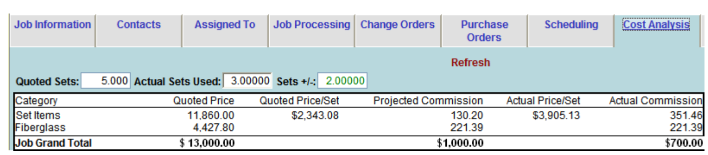
Editing a Job

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]).



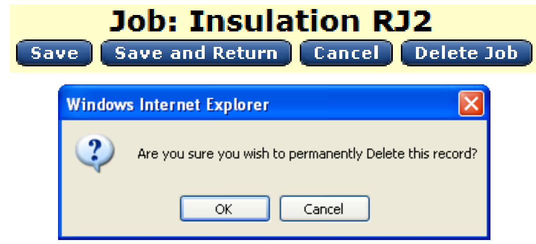
5. Change Orders – A change order is used to adjust the material priced for on a bid. Click **Add Change Order Bid** and refer to [editing a bid].
6. Purchase Orders – (See information about [adding a purchase order])
7. Scheduling – Include estimated and actual start and end dates. Click the to insert 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).

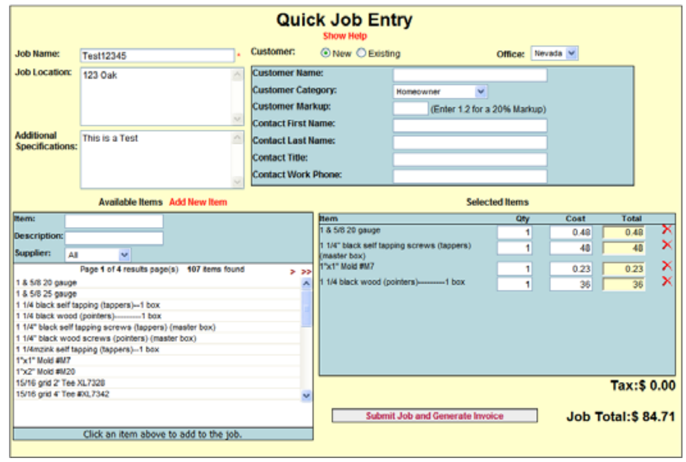
When finished, click **Save** or **Save and Return**.

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](#).

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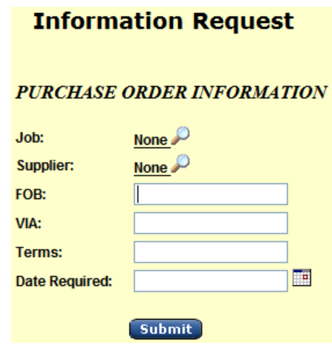
Purchase Orders

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

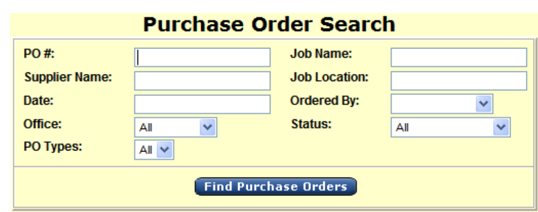
Adding a Purchase Order

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**



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.

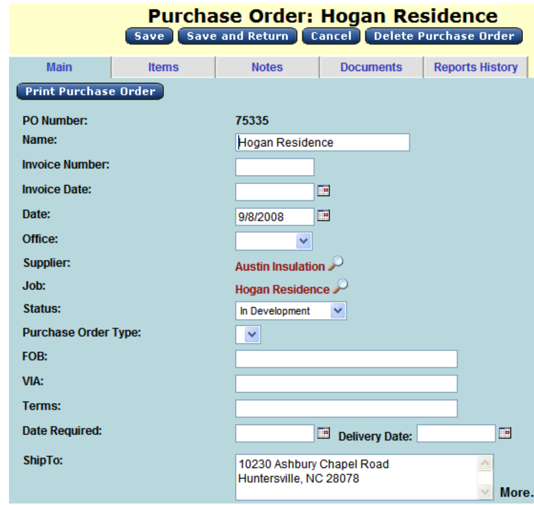


Editing a Purchase Order

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

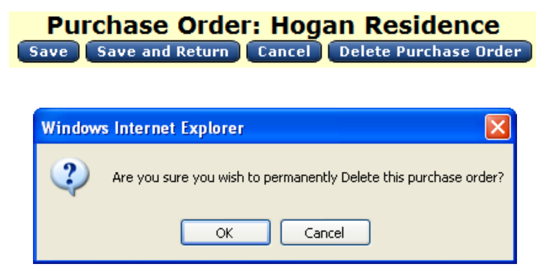
1. Main – Allows you to **Print Purchase Order**
    a. Invoice Number – Corresponding number to purchase order
    b. See [Adding a Purchase Order](#) for last half
2. Items – Displays purchased items. To add another item to the order, click **Add Purchase Order Item**
    a. To delete an item from purchase, click the ✕
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**.



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**.

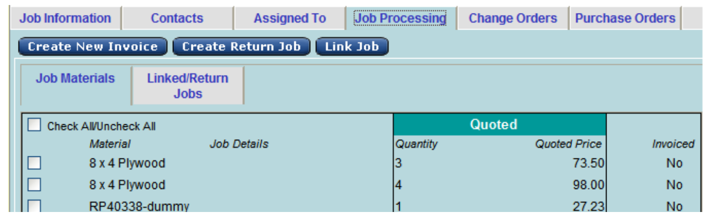


Invoices

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](#).



Searching for an Invoice

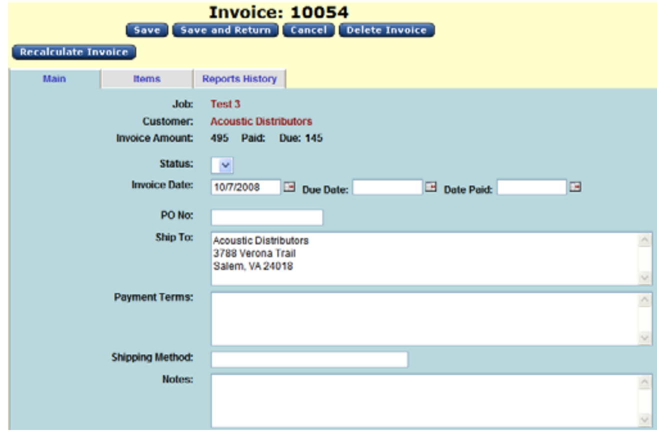
1. Point to **Search** on the main toolbar, and then click **Invoices**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Invoices** to show all.
3. To view an invoice, click **View** in search results**.**

Editing an Invoice

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

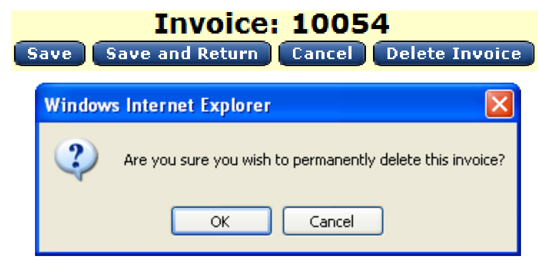
1. Main – Displays the invoice amount, how much has been paid, and what is due. It also includes all of the pertinent dates, shipping address and shipping method.
2. Items – Displays purchased items. To add another item to the order, click **Add Purchase Order Item**.
    a. To delete an item from purchase,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

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



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**.

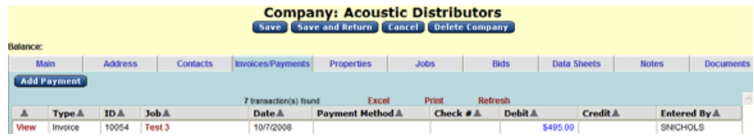


Payments

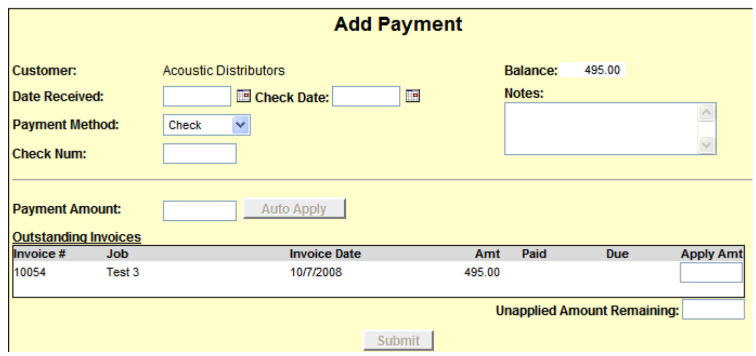
The Payments function allows you to keep track of what and how much your customers have paid.

Making a Payment

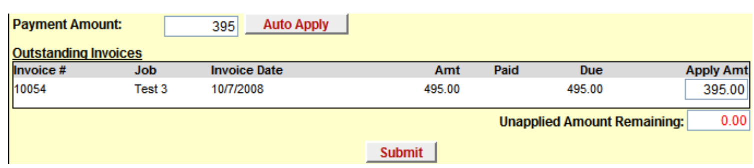
The first step to making a payment is choosing which customer you want to pay. From that customer's main screen, choose the **Invoices/Payments** tab.



1. To add a payment, click **Add Payment**
2. The Add Payment Screen will appear

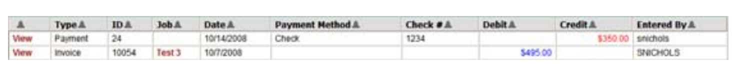


   a. Enter the date received and the date listed on the check (if it is a check)
   b. Choose the payment method from the drop down list
   c. Enter the check number
   d. Enter the Payment Amount
      i. You can enter part or all of the total amount that is listed on the invoice
      ii. After entering 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

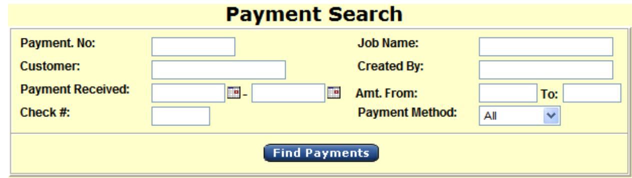
3. The payment will be displayed as a credit



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

Searching for a Payment

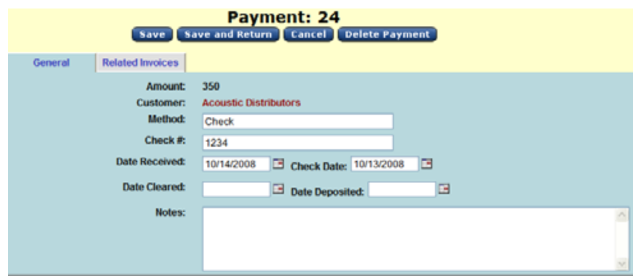
1. Point to **Search** on the main toolbar, and then click **Payments**.
2. You can search based on specific criteria, or leave the text boxes blank and click **Find Payments** to show all.
3. To view a payment, click **View** in search results.



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:

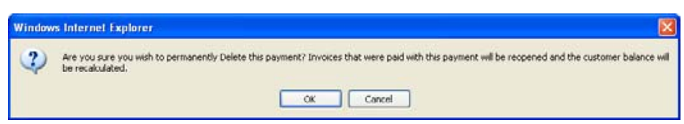
1. General – Allows you to edit the data entered when making the payment
   a. Date Cleared -- Enter the date the check cleared
   b. Date Deposited – Enter the date the check was deposited
2. Related Invoices – Shows the invoice this payment pertains to and the balance remaining



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



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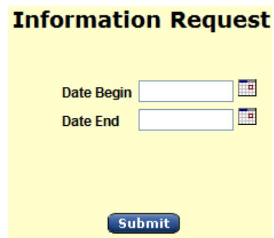
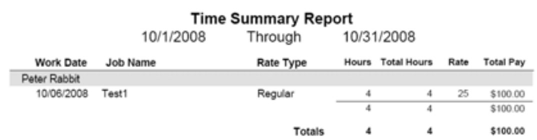
Chapter 3: Reports

Time Summary Report

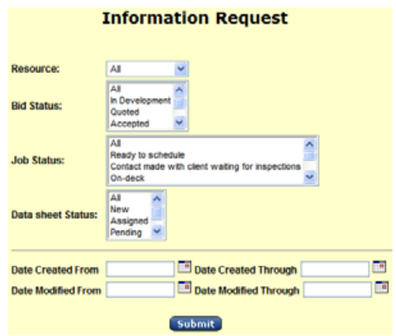


The Time Summary Report helps you to keep track of how many hours your resources have worked. Point to **Reports** and click **Time Summary Report**. Enter a beginning and ending date by clicking the . Then click **Submit**. A PDF file will be opened and display which resource has worked, the job name,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



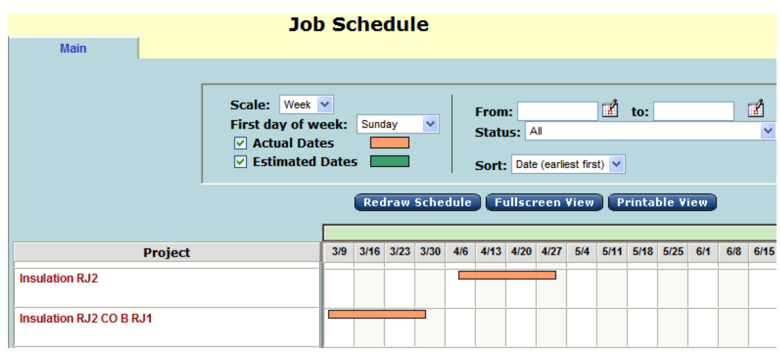
Employee Assignments

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.



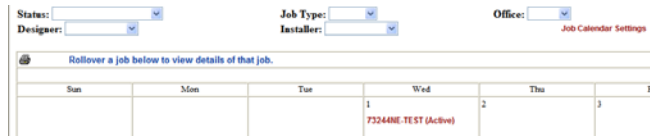
Job Schedule

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.



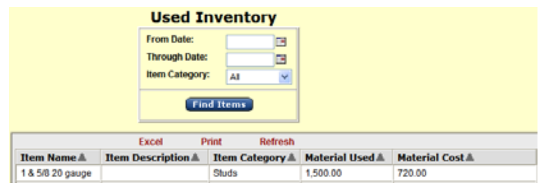
Job Calendar

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.

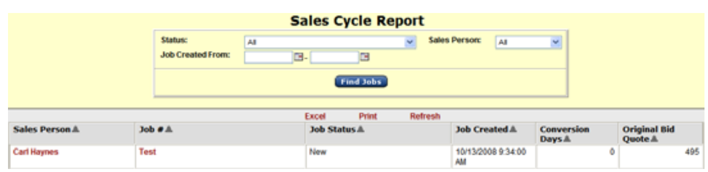


Commissions Report

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

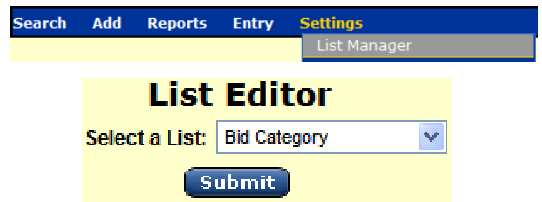
You can search based on specific criteria or click **Find Jobs** to show all.



Chapter 4: Configuring the System

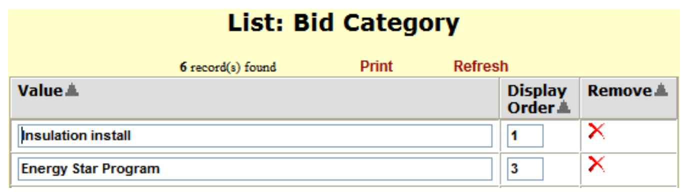
This section will be accessed by the System Admin.

List Manager



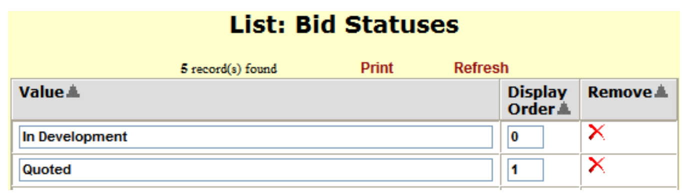
To access the different options to configure under list manager, point to settings and then click **List Manager**. From the drop down list, choose which option you would like to begin configuring and click **Submit**.

Bid Category



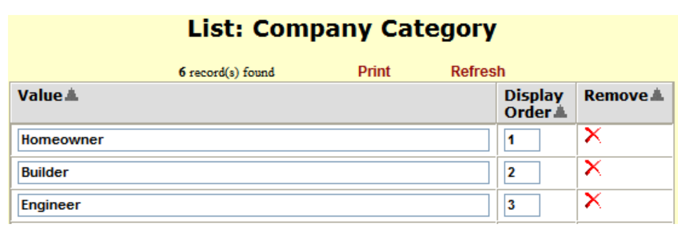
To categorize the different bids in your system you must configure this feature. You can personalize the categories to what best fits your business. Click **Add New Item** to insert a new row. Display Order is the order it will take on the drop down list. When finished, click **Save**.

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**.

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**.

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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	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		✕

Add New Item Save

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

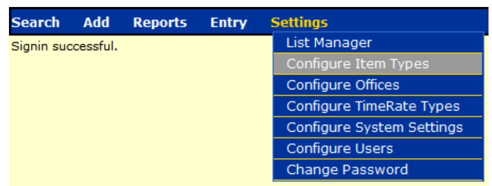
Value	Display Order	Remove
Renovation	1	×
New Construction	2	×
Modification	3	×
Consultation	4	×

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 , then click **Save**. If there is no 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**.

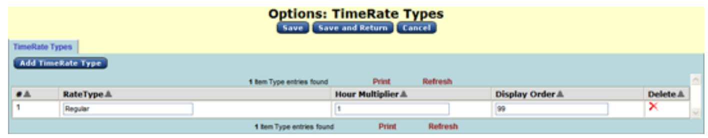
*Note: Certain item types have special formulas associated to them. Be careful when editing item types as they may cause the special formulas to stop working. If you have any questions with the item types currently configured in your system, please call JobPro™ support.

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

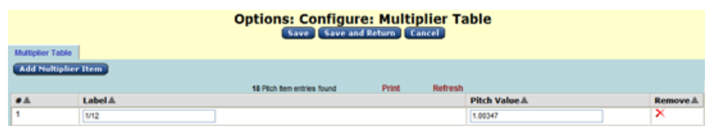
Configuring TimeRate Types

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



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



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.

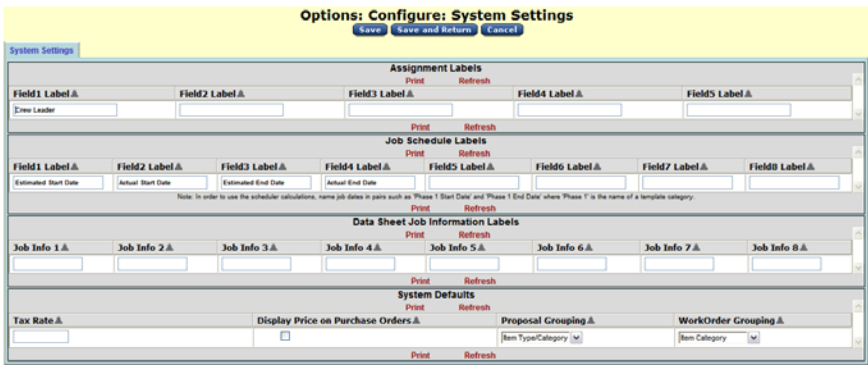
Example: You pay 3% commission on Garage Doors sold at or above $500 each:

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

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

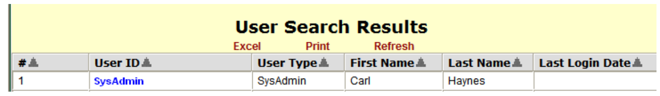
Configuring System Settings

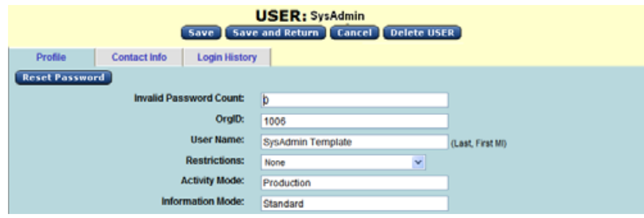
The System Settings allow you to setup the Assignment Labels (labels appearing on the Job Assignment tab), Job Schedule Labels (labels appearing on the Scheduling tab), Data Sheet Job Information Labels (labels appearing on the Datasheet), and the System Defaults. The Tax Rate will be the default tax 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**.





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.

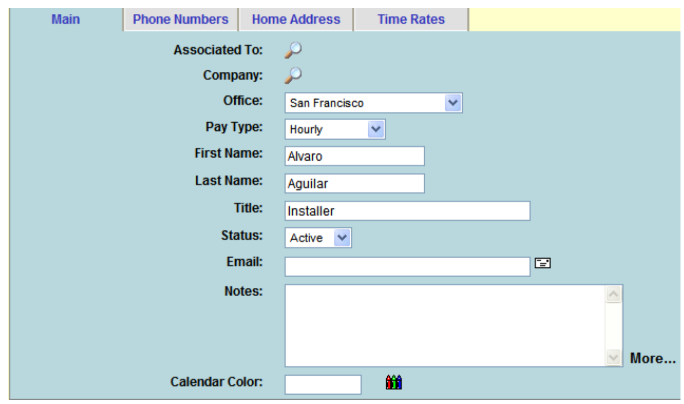
Chapter 5: Advanced Topics

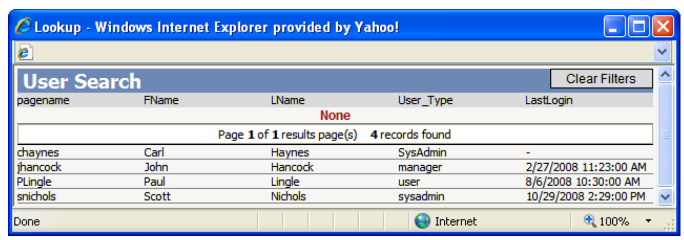
Salespeople Bid Security

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.