

Ready to Set Up for JobFlow?

Before you begin your set up have you:

- Returned your JobFlow Agreement signed.
- Entered the date on the agreement you would like to start? (allow 2-4weeks to get set up and run trial jobs before you kick off)
- Let us know if you don't use Xero for your invoicing (We will send another Set-Up Checklist for you)

Overview

As a Xero client you can either run the following reports and send them to us (preferred) or we can run these for you if you are comfortable with giving us momentary access to your Xero (confidentiality and privacy a given!)

Do as much or as little as you like, the gaps can be entered straight into JobFlow by your team later, this is your chance to get us to auto-magically get what data we can into JobFlow for you.



Where to send the information to?

Send all of your information to info@jobflow.nz and make sure we can identify who you are, and what you are sending- subject line for instance could be: JCL – Customer and Site Locations

If you have any questions call us on:

0800 562 008

What Next?

Once we have all of the information you are able to send to us we will arrange our first training session – this is from an admin perspective it takes 1.5-2hrs and covers:

- Overview of JobFlow [15mins]
- Creating/booking a Job [30mins]
 - Create a Job
 - Add a Customer
 - Add a Site Location
- Scheduling Work [15mins]
- Invoicing [15mins]
- Refining your settings [15 mins]
- Next Steps [15mins]

Checklist

Here's what we can get from Xero(see next pages as to how) with some data massaging:

- Customer (Billing) Information:** trading name and billing contact details.
- Site Locations:** work sites, primary and as many others as are associated with the customer.
- Products, Materials and Services:** Inventory items in Xero
- Resources:** Assets recorded in Xero may be used for Vehicles and Implements.

Heres the additional information we will need:

- Workers Names:** also loaded as resources we need:
 - short name eg. Bob
 - full name eg. Robert McDonald
 - what licenses they hold, or if particular what tractor do they drive eg. Class 5 License, 31- JD6430
 - payroll id for future integration with payroll do they have a staff no.?
- Site Locations:** like quarries, yards you may want to enter as a pick up point (source) or waypoint or destination (drop to) we need:
 - Site Name
 - Contact Name – contact on Site
 - Contact Mobile
 - Site Address (physical)
- Storage Locations:** where do you store products and materials that you want tracked? We need: Site Name
 - Contact Name – contact on Site
 - Contact Mobile
 - Site Address (physical)

And here's what we will work on creating together (where all the magic comes together):

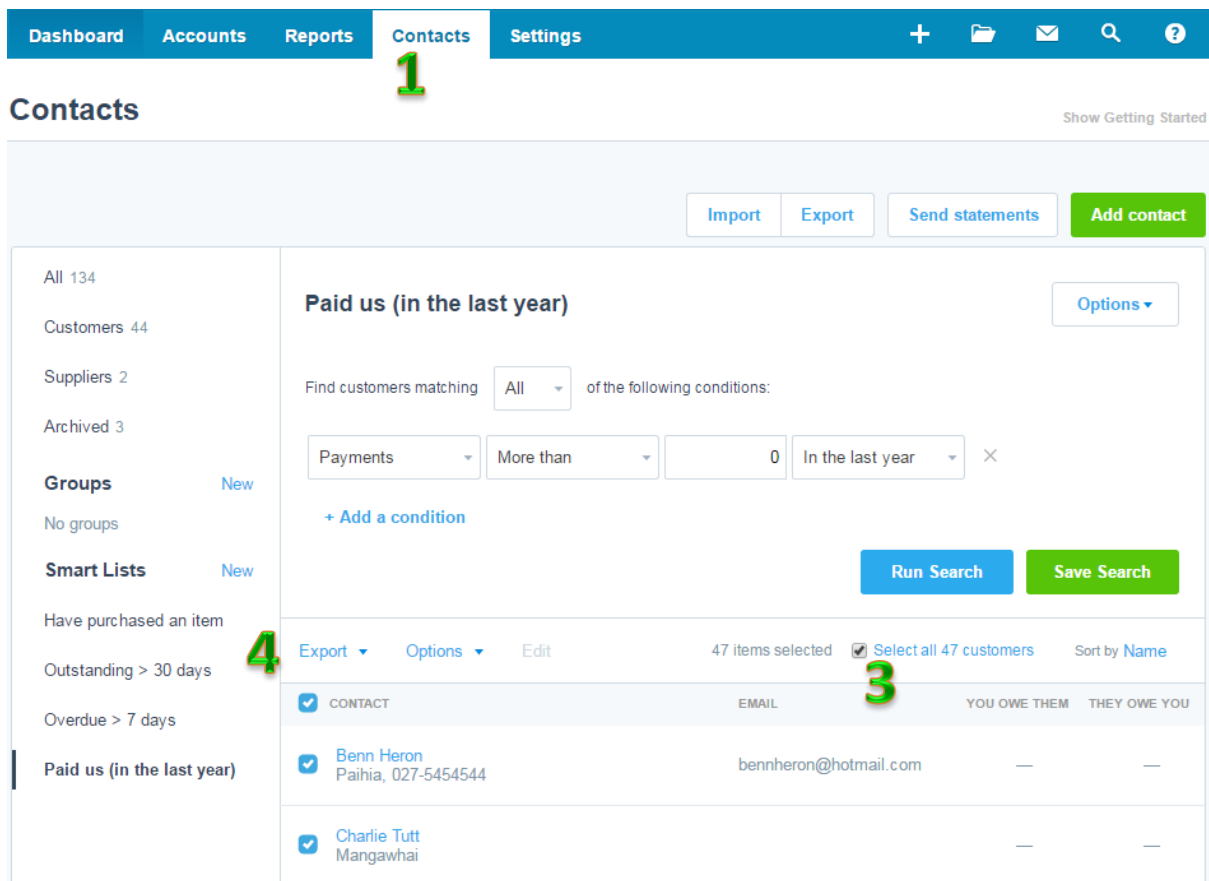
- Teams:** For a particular job who usually carries out each task and with what vehicle and implement?
- Attributes:** Links tasks with resources so scheduling/assigning is intuitive.
- Job Templates:** Set up your jobs with your tasks and charge out rates (I will send a template for you to fill in with a couple of examples which we will work through, then leave you once trained to load the rest).

In addition to this, when the set-up is ready and you are happy to connect to Xero we will send you instructions on how to connect your Xero account to JobFlow.

Xero Information

Customer Information and Site Locations

1. From your Main Menu in Xero select **“Contacts”**, then **“All Contacts”**
2. In the left hand menu below **“Smart Lists”** select either **“Have purchased an item”** or **“Paid us (in the last year)”** this last one is preferred as this will have your more current customers.
3. Select **“Select all xx Customers”** or check through the list and tick those that you would like to export.
4. **Export** this information to CSV (this downloads a file that will look something like this” leads-export-2016-08-02T10-32-49.csv “ into your downloads file, and you should be prompted to view or open the file when downloaded.



The screenshot shows the Xero Contacts interface. The top navigation bar includes Dashboard, Accounts, Reports, **Contacts** (highlighted with a green '1'), and Settings. Below the navigation bar, the 'Contacts' page is displayed. On the left, there is a sidebar menu with 'Smart Lists' (highlighted with a green '2') and the option 'Paid us (in the last year)'. The main content area shows a search filter for 'Paid us (in the last year)' (highlighted with a green '4'). The filter criteria are 'Payments' (More than 0 in the last year). Below the filter, there are 'Run Search' and 'Save Search' buttons. A table of contacts is shown below the filter, with 47 items selected. The table has columns for CONTACT, EMAIL, YOU OWE THEM, and THEY OWE YOU. Three contacts are visible: Benn Heron, Charlie Tutt, and Charlie Tutt. A green '3' highlights the 'Select all 47 customers' checkbox.

5. Open this file in Excel

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Name	EmailAdd	FirstName	LastName	POAttenti	POAddress	POAddress	POAddress	POAddress	POCity	PORegion	POPostalC	POCountr
2	Benn Heron	bennhero	Benn	Heron		114 Te Hau	Paihia			Paihia		200	
3	Charlie Tutt					5 Nautical	Mangawhai Heads			Mangawhai		505	
4	Corrina Thorburn		Corrina	Thorburn		108 Port A	Wellsford			Wellsford		900	
5	Dave Hall	davehal@xtra.co.nz				13 Riverb	Kerikeri			Kerikeri		230	
6	Dave Harding												
7	Deborah M	info@whc	Deborah	Murtagh		11 Stella F	Chartwell			Hamilton		3210	

6. **Check the file..** and tell us what each column is (fill these out more if you can or else your entry once this is imported can go straight into JobFlow to fill the gaps)

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Name	EmailAdd	FirstName	LastName	POAttenti	POAddress	POAddress	POAddress	POAddress	POCity	PORegion	POPostalC	POCountr
2	Benn Herc	bennhero	Benn	Heron		114 Te Hau	Paihia			Paihia		200	
3	Charlie Tutt					5 Nautical	Mangawhai Heads			Mangawhai		505	
4	Corrina Th	thorburn	Corrina	Thorburn		108 Port A	Wellsford			Wellsford		900	
5	Dave Hall	davehal@xtra.co.nz				13 Riverb	Kerikeri			Kerikeri		230	
6	Dave Harding												
7	Deborah M	info@whc	Deborah	Murtagh		11 Stella F	Chartwell			Hamilton		3210	

Typically we use:

Name= Trading Name

Email Address = Billing/Trading Accounts Email Address

First Name(s) & Last Name = Primary Customer Contact

PO Address(s) = Billing Address Details

SAAttenti	SAAddress	SAAddress	SAAddress	SAAddress	SACity	SARegion	SAPostalC	SACountr
	114 Te Hau	Paihia			Paihia		200	
	5 Nautical	Mangawhai Heads			Mangawhai		505	
	108 Port A	Wellsford			Wellsford		900	
	13 Riverb	Kerikeri			Kerikeri		230	

SA(Site Address) Attention = Primary Site(work) Location Contact Name

SAAddress(s) = Primary Site (work) location address details

Then tell us if you have used these if they are the Customer Billing Contact details or Site Location Contact details:

PhoneNumber FaxNumber MobileNumber DDINumber SkypeName Website

Adding more site locations If you have more than one work site for that customer/trading name (which is common) you can add more columns across the page to be loaded as additional site locations (or you can add straight into JobFlow)

SA1Line1 SA1Line2 SA1Line3 SA1 Line4 SA1City SA1Region SA1PostalCode

No Street/Rd District City Region PostalCode

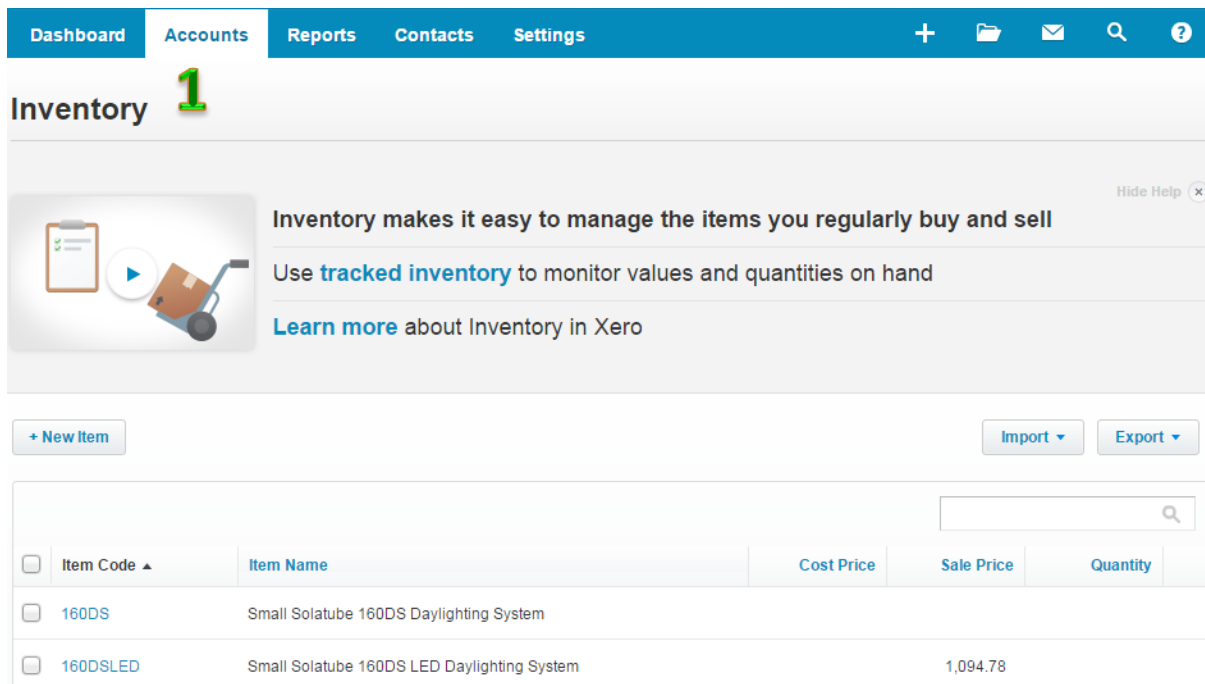
7. Save and send us this file.

Products, Materials and Services

You may have used “ Inventory’ in Xero to create all of your invoice line items or descriptions for products, materials and services.

To find and export these from Xero:

1. From your Main Menu in Xero select “**Accounts**” and then “**Inventory**”
2. Select **Export** to **CSV**



3. Open this file in Excel,(it will be named something like InventoryItems-20160801.csv)
4. Here are the columns we are interested in:

	A	B	G	H	I
1	*ItemCode	ItemName	SalesDescription	SalesUnitPrice	SalesAccount
2	160DS	Small Solatube 160DS Daylighting System	To supply and install - Small Solatube [160DS] Daylighting System	0	203
3	160DSLED	Small Solatube 160DS LED Daylighting System	Supply & Install Solatube 160DS LED Daylighting System	1,094.78	203
4	160DSV	Small Solatube 160DS Ventilating DaylightingSystem	Supply & Install Small Solatube 160DS Ventilating Daylighting System	1,394.78	203

-**Item Code** =Stock Code

-**Sales Description** = Invoice Description

-**Sales Unit Price** = Sell Price

-**Sales Account** = GL Code (for accounts)

5. Work through each item (delete those that aren’t current) and add:

Unit = Unit of measure this is priced as eg tonne, bale, kg, hr etc

Type = is this a Product(stock tracked), Material (Stock not tracked) or Service

Category =(one of the below, this is used as a filter- select the one that best suits)

-Baling

-Cartage

-Fertiliser

-General

-Inoculant

-Poly

-Seed

-Spray

-Fuel

-Silage

-Cultivation

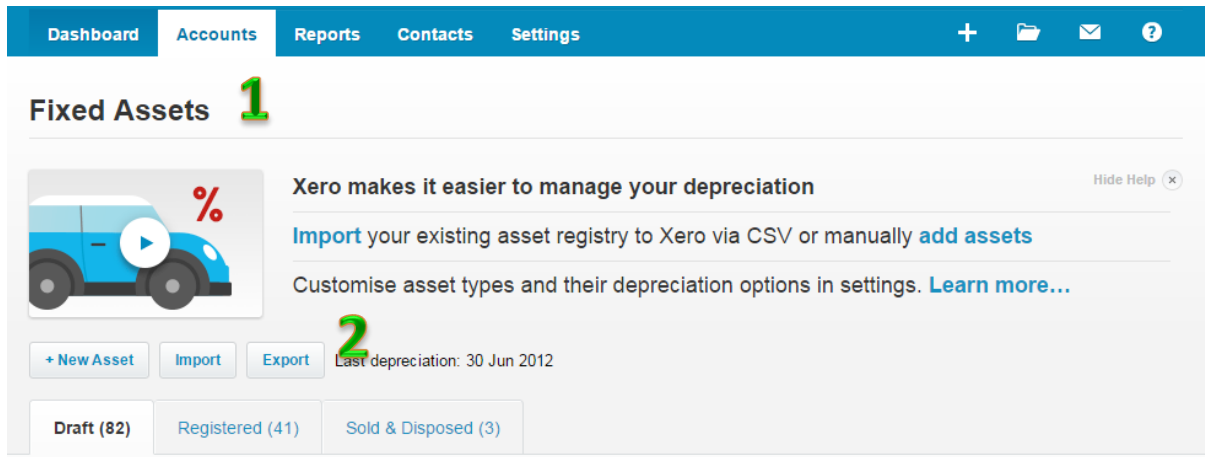
-Labour

-Machinery

Resources (Vehicles and Implements)

You may have an asset register in Xero that can be used as a starting point for your resources (vehicles and implements)

1. From your Main Menu in Xero select **“Accounts”** then **“Fixed Assets”**
2. Select **Export** to **CSV**
3. Open this file in Excel



Redefine your assets to give us the following details:

- **Short Name** for asset eg #31 JD6430 *used on job cards to identify which vehicle/implement to take to do a task*
- **Long Name** for asset eg. #31 John Deere 6430 (Leased)
- **Asset Id:** eg #31 (not mandatory)
- **Type:** Vehicle or Implement
- **Sub Type:** enter one from the below that best describes your asset:

-Baler	-Cultivator	-Disc
-Drill	-Harvester	-Loader
-Mower	-Planter	-Plough
-Power Harrow	-Rake	-Roller
-Roller Tiller	-Rotor Spike	-Spreader
-Subsoiler	-Tiller	-Tedder
-Tractor	-Trailer	-Truck