

JobFlow – Scheduling and Printing Job Cards

This guide covers:

- 4. Scheduling Work**
 - a. Is the Job Status Booked?**
 - b. Printing a Quote**
 - c. Scheduling**
- 5. Printing Job Cards**

..next steps are

6. Completing Jobs
7. Reviewing for Invoicing
8. Refining your settings (job templates, teams, attributes, resources, stock)

By then you will be a JobFlow pro!

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4. SCHEDULING WORK

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| Page 3,4 | b) Printing a Quote |
| Page 5,6,7 | c) Scheduling (with default settings/assignments) |
| Page 8 | c) Scheduling (changing default assignments) |

5. PRINTING JOB CARDS

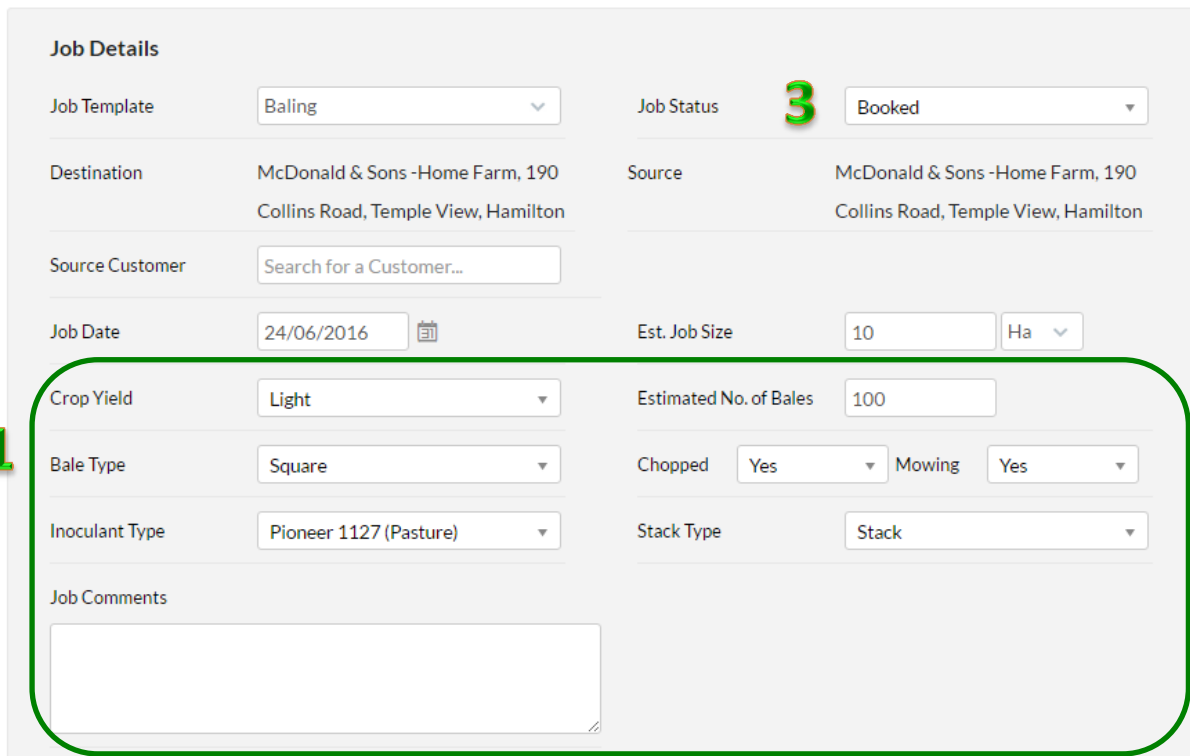
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4. SCHEDULING WORK

a. Is the Job Status “Booked”?

Before moving to Scheduling, have you

1. Filled in all of the additional information you can about the job? Each template will display different details depending on the type of the job.



Job Details

Job Template: Baling | Job Status: **3** Booked

Destination: McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton | Source: McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton

Source Customer: Search for a Customer...

Job Date: 24/06/2016 | Est. Job Size: 10 Ha

1 Crop Yield: Light | Estimated No. of Bales: 100

Bale Type: Square | Chopped: Yes | Mowing: Yes

Inoculant Type: Pioneer 1127 (Pasture) | Stack Type: Stack

Job Comments: [Empty text area]

2. Set the Charge Types?

Tasks	Size	Calc. Work	2 Charge type	Charge Rate	Calculated Price
Mow	10 ha	2.5 hr	Mow (ha) - \$50 / ha	\$ 50	\$ 500.00
Rake	10 ha	1.3 hr	Rake (ha) - \$50 / ha	\$ 50	\$ 500.00
Tedder	10 ha	1.3 hr	Tedder - \$50 / ha	\$ 50	\$ 500.00
x Bale/Wrap	10 ha	5.0 hr	Bale/Wrap - \$100 / ha	\$ 100	\$ 1,000.00
Loading	10 Ha	10.0 hr	Loading - \$50 / hr	\$ 50	\$ 500.00
Stack	10 Ha	10.0 hr	Stack - \$50 / hr	\$ 50	\$ 500.00
Add Task	Totals	30.00			\$3,500.00

3. Change the status to “Booked” ? To be available to be scheduled the job must be booked.

b. Printing a Quote

When you have set the charge types JobFlow will calculate the price based on expected hrs/ha and the charge type selected. You still have the opportunity to

1. enter a special or manual price
2. alter tasks to be included or excluded from billing

Tasks	Size	Calc. Work	Charge type	Charge Rate	Calculated Price	Manual Price ¹	Quoted Price	Billing ²	
Mow	10 ha	2.5 hr	Mow (ha) - \$50 / ha	\$ 50	\$ 500.00	\$	\$ 500.00	<input checked="" type="checkbox"/>	↕
Rake	10 ha	1.3 hr	Rake (ha) - \$50 / ha	\$ 50	\$ 500.00	\$	\$ 500.00	<input type="checkbox"/>	↕
Tedder	10 ha	1.3 hr	Tedder - \$50 / ha	\$ 50	\$ 500.00	\$	\$ 500.00	<input type="checkbox"/>	↕
Bale/Wrap	10 ha	5.0 hr	Bale/Wrap - \$100 / ha	\$ 100	\$ 1,000.00	\$	\$ 1,000.00	<input type="checkbox"/>	↕
Loading	10 Ha	10.0 hr	Loading - \$50 / hr	\$ 50	\$ 500.00	\$	\$ 500.00	<input type="checkbox"/>	↕
Stack	10 Ha	10.0 hr	Stack - \$50 / hr	\$ 50	\$ 500.00	\$	\$ 500.00	<input type="checkbox"/>	↕
Add Task		Totals	30.00		\$3,500.00	\$0.00	\$3,500.00		

Services	Quantity	Rate	Calculated Price	Manual Price
Square Silage <50ha (rake/bale/wrap/stack - per bale)	0.0000	\$ 49	\$ 0.00	\$ 0.00
Add Service			Totals	\$0.00

Materials	Quantity	Rate	Calculated Price	Manual Price
Polythene Black/White (12m)	20	\$ 99	\$ 1,980.00	\$
Add Material			Totals	\$1,980.00

When all charges look accurate select the “print” icon at the top right of the page.

Home / Jobs / #16-0006 Hi S2usera! [Logout >](#)

#16-0006

Bill McDonald - Baling

[Save Job](#)

[Duplicate Job](#)

[Duplicate with Assignments](#)

[Cancel](#)



Job Details


Job Template

Job Status

Destination McDonald & Sons -Home Farm, 190
Collins Road, Temple View, Hamilton

Source McDonald & Sons -Home Farm, 190
Collins Road, Temple View, Hamilton

Source Customer

Job Date 

Est. Job Size

This will give you the option to print (will look up the printers or pdf options you have available) the job as an estimate or quote.

#16-0006 - Baling

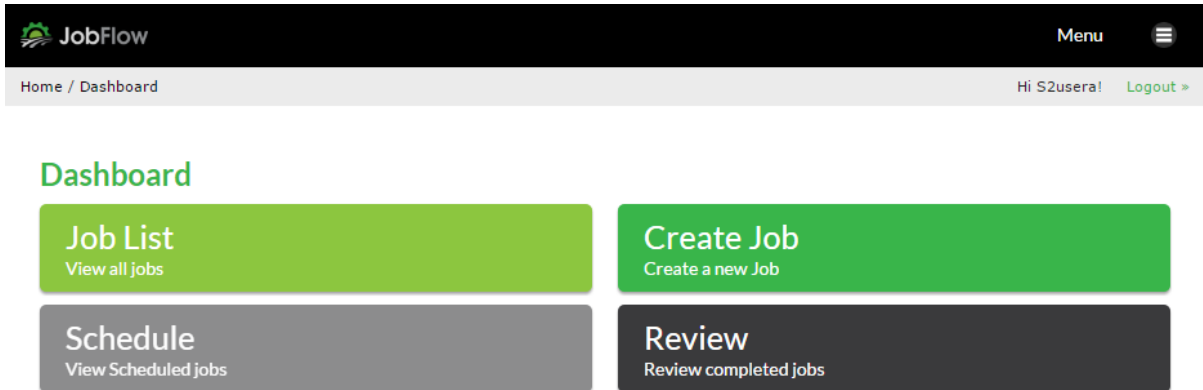
Date: 24/06/2016

Customer:	Bill McDonald	Phone:	078765432	Trading Name:	McDonald & Sons
				Mobile:	027654321
Job Date:	24/06/2016	Est. Job Size:	10 Ha		
Crop Yield:	Light	Estimated No. of Bales:	100		
Bale Type:	Square	Chopped	Mowing	Yes	
		Yes			
Inoculant Type:	Pioneer 1127 (Pasture)	Stack Type:	Stack		
Job Comments:					

Tasks	Quantity	Price
Mow	10	\$500.00
Tasks Subtotal		\$500.00
Services	Quantity	Price
Square Silage <50ha (rake/bale/wrap/stack - per bale)	100	\$4,900.00
Services Subtotal		\$4,900.00
Materials	Quantity	Price
Polythene Black/White (12m)	20	\$1,980.00
Materials Subtotal		\$1,980.00
Total		\$7,380.00

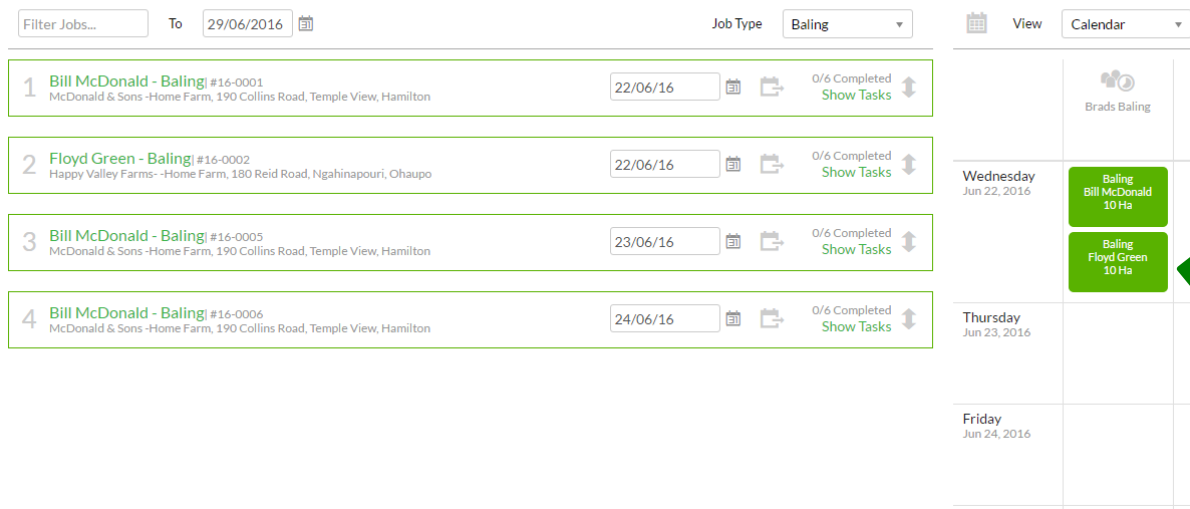
c. Scheduling

From the Dashboard select **Schedule**, or select Schedule from the main menu



All of these example jobs are on time and **green**, you will see them as **red** in the job list if they are overdue.



Schedule Jobs



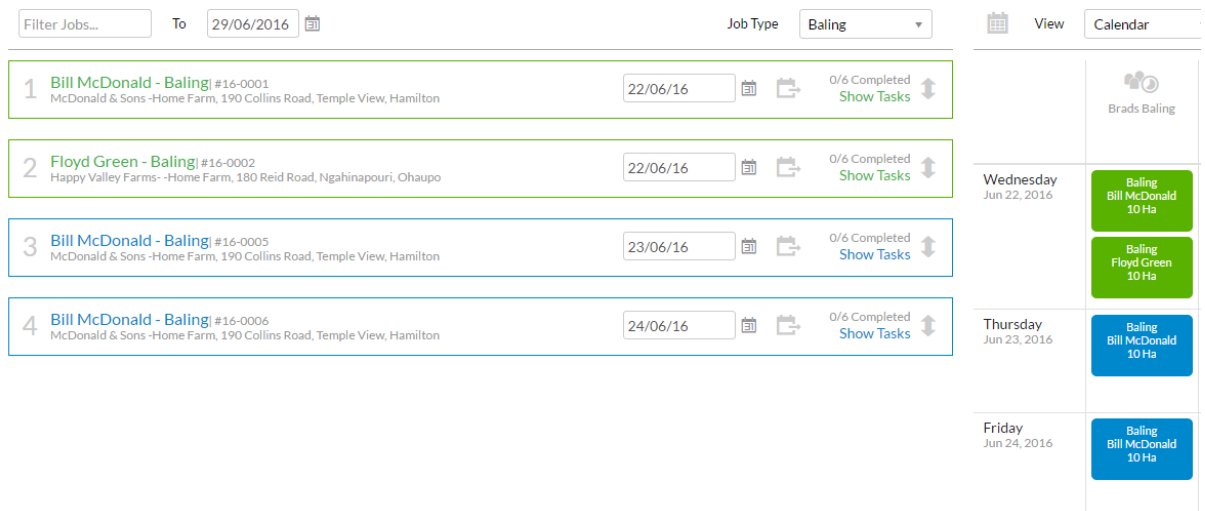
The screenshot shows the 'Schedule Jobs' interface. At the top, there are filters: 'Filter Jobs...', 'To 29/06/2016', 'Job Type Baling', and 'View Calendar'. Below the filters is a list of four jobs, each with a priority number, name, address, due date, and completion status. To the right of the list is a calendar view showing the dates from Wednesday, June 22, 2016, to Friday, June 24, 2016. The calendar shows two green blocks for 'Baling' jobs: one for 'Bill McDonald' on Wednesday, June 22, and one for 'Floyd Green' on Thursday, June 23. A large green arrow points from the calendar view back to the job list.

Priority	Job Name	Address	Due Date	Completion Status
1	Bill McDonald - Baling #16-0001	McDonald & Sons - Home Farm, 190 Collins Road, Temple View, Hamilton	22/06/16	0/6 Completed
2	Floyd Green - Baling #16-0002	Happy Valley Farms - Home Farm, 180 Reid Road, Ngahinapouri, Ohaupo	22/06/16	0/6 Completed
3	Bill McDonald - Baling #16-0005	McDonald & Sons - Home Farm, 190 Collins Road, Temple View, Hamilton	23/06/16	0/6 Completed
4	Bill McDonald - Baling #16-0006	McDonald & Sons - Home Farm, 190 Collins Road, Temple View, Hamilton	24/06/16	0/6 Completed

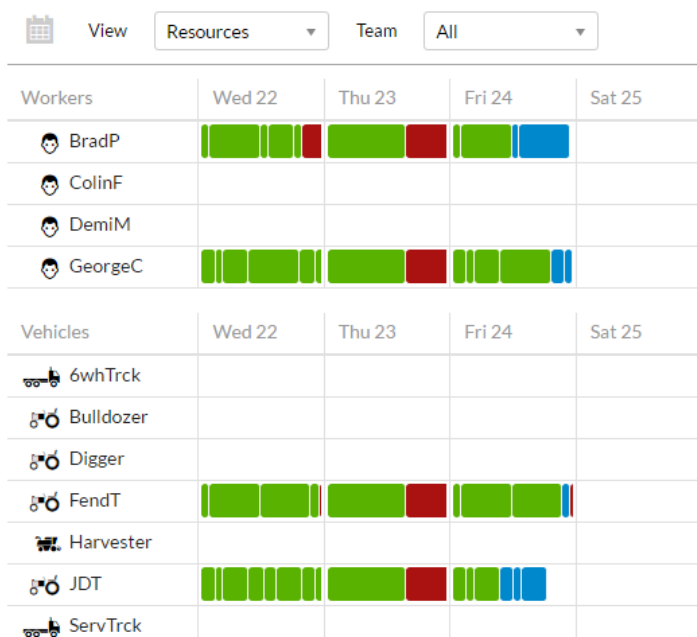
Jobs in position/priority order 3 and 4 haven't been scheduled, while 1 and 2 are on the calendar already in Brads Baling Team.

1. Reorder your priorities with the tasks using  the arrows tool to drag and drop to another position.
2. Add to the calendar by using  the 'drag to team' tool, drag and drop the job on the date you would like to have it scheduled for.
3. Those jobs are now **blue** and waiting for you to confirm.

Schedule Jobs



4. Switch to the **Resource** view to see how if these jobs are over-allocating any of your resources.
 This example shows that already on Wed and Thu these resources are over allocated...and some of your assignments waiting confirmation (in **blue**) will further exasperate your schedule.



-Hover over each block of work to show more details.

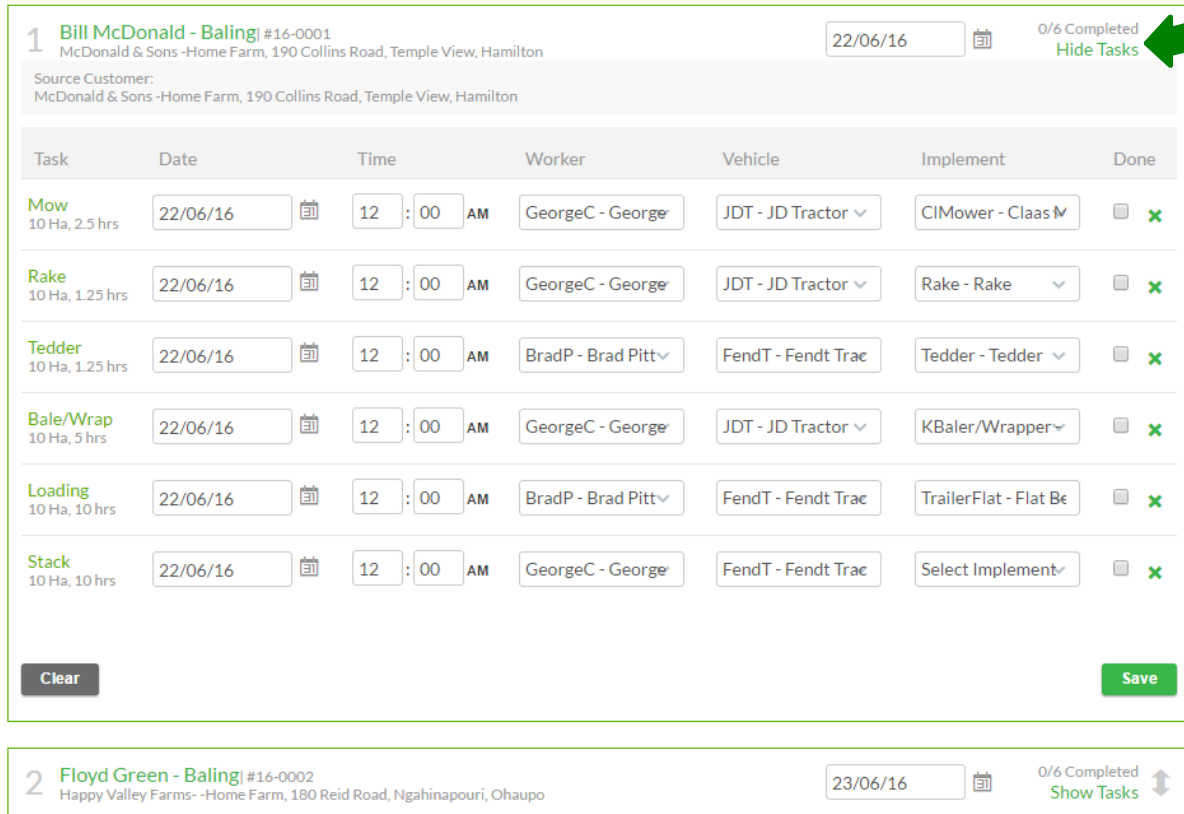
-Drag and drop the blocks of work to move them out a day or to another resource.

-Or (recommended) move the whole job out a day on the calendar view rather than all the parts.

So far in this example we have used the default assignments, the workers, vehicles and implements which are recommended in the team set up.

What if BradP doesn't turn up for work and we need to assign it to ColinF?

By selecting **Show Tasks** the job will expand to show all of the resources assigned



1 Bill McDonald - Baling #16-0001
 McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton
 22/06/16 0/6 Completed
 Hide Tasks

Source Customer:
 McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton

Task	Date	Time	Worker	Vehicle	Implement	Done
Mow 10 Ha, 2.5 hrs	22/06/16	12 : 00 AM	GeorgeC - George	JDT - JD Tractor	CIMower - Claas	<input type="checkbox"/>
Rake 10 Ha, 1.25 hrs	22/06/16	12 : 00 AM	GeorgeC - George	JDT - JD Tractor	Rake - Rake	<input type="checkbox"/>
Tedder 10 Ha, 1.25 hrs	22/06/16	12 : 00 AM	BradP - Brad Pitt	FendT - Fendt Trac	Tedder - Tedder	<input type="checkbox"/>
Bale/Wrap 10 Ha, 5 hrs	22/06/16	12 : 00 AM	GeorgeC - George	JDT - JD Tractor	KBaler/Wrapper	<input type="checkbox"/>
Loading 10 Ha, 10 hrs	22/06/16	12 : 00 AM	BradP - Brad Pitt	FendT - Fendt Trac	TrailerFlat - Flat Be	<input type="checkbox"/>
Stack 10 Ha, 10 hrs	22/06/16	12 : 00 AM	GeorgeC - George	FendT - Fendt Trac	Select Implement	<input type="checkbox"/>

Clear Save

2 Floyd Green - Baling #16-0002
 Happy Valley Farms -Home Farm, 180 Reid Road, Ngahinapouri, Ohaupo
 23/06/16 0/6 Completed
 Show Tasks

You can either change the worker in the dropdown box or go to **Garage** view and drag and drop ColinF against each task.

ColinF isn't in Brads Baling team, but that's ok because you can always select anyone from across the whole organisation when you want to.

View Garage Team Brads Baling

Brads Baling

TrailerFlat

GeorgeC

JDT

Tedder

KBaler/Wrapper

CIMower

FendT

BradP

Rake

ColinF

DemiM

6whTrck

Bulldozer

Digger

Harvester

ServTrck

Disc

Drill/Fert

LoaderWagon

Plough

R-S-R

5. PRINTING JOB CARDS

Now your work is scheduled you want to give each worker a job card for each task they are assigned to.

Select **Job Cards** from the main menu.

Using either the **print cards** tick box and **print card selection** print your job cards.

...or the print icon to

Each task has its own Job Card, which has two sections – Information about the job, and the task this job card is for ..

#16-0001 - Baling

Date: **22/06/2016**

1

Source Address	McDonald & Sons -Home Farm - 190 Collins Road, Temple View, Hamilton		Tanker: #99000
Site Contact:	Bill		027654321
Customer:	McDonald & Sons	027654321	Worker: GeorgeC
Address:	McDonald & Sons -Home Farm 190 Collins Road Hamilton	Tanker: #99000	Vehicle: JDT
Site Contact:	Bill	027654321	Implement: CIMower
			Task: Mow

Job Date:	22/06/2016	Est. Job Size:	10 Ha
Crop Yield:		Estimated No. of Bales:	
Bale Type:		Chopped	Mowing
Inoculant Type:		Stack Type:	
Job Comments:			

...and a default print layout for the type of information you want that worker to record on that job.

This is a single (the simplest) print layout. These are set on the Job Template.

Date	Start Time	Finish Time	Down Time	Details
Hectares:				
Materials Used:				
Comments:				

The primary task, in this example the Baler/Wrapper has a **baler print layout** which is set against this task on the Job Template. As this is the primary task it gives this worker an overview of the whole team on the job, products and materials (those on the job and the opportunity to add those that arent)

Tasks	Worker	Vehicle	Implement	Size	Hrs
Mow	GeorgeC	JDT	CIMower	10 Ha	
Rake	GeorgeC	JDT	Rake	10 Ha	
Tedder	ColinF	FendT	Tedder	10 Ha	
Bale/Wrap	GeorgeC	JDT	KBaler/Wrapper	10 Ha	
Loading	ColinF	FendT	TrailerFlat	10 Ha	
Stack	GeorgeC	FendT		10 Ha	

Product Name	Store Location	Quantity	Notes

Material Name	Quantity	Notes
Polythene Black/White (12m)	20 m	

Example **Cartage** Print Layout: use for loader wagons, cartage etc

#16-0008 - Cartage

Date: 28/06/2016

1

Source Address	Sunshine Orchards Main Entrance - 2345 Ohaupo Road, Ohaupo, Te Awamutu	Tanker: #99003
Site Contact:	Karma	078591239

Customer:	Sunshine Orchards	078591239	Worker:	ColinF
Address:	Green Farms- -Home Farm 1725 Kakaramea Road Hamilton	Tanker: #99001	Vehicle:	6whTrck
Site Contact:	Floyd	022365498	Implement:	TrailerFlat
			Task:	Cartage

Job Date: 28/06/2016 Est. Job Size: 5 hr

Order #:

Job Comments:

Date	Start Time	Finish Time	Down Time	Details

Load #	Weigh Time	Details	Load #	Weigh Time	Details
1			11		
2			12		
3			13		
4			14		
5			15		
6			16		
7			17		
8			18		
9			19		
10			20		

Example **Harvester** Print Layout: use for grass or maize

#16-0009 - Silage

Date: 29/06/2016

1

Source Address	Green Farms- -Home Farm - 1725 Kakaramea Road, Ngahinapouri, Hamilton	Tanker: #99001
Site Contact:	Floyd	022365498

Customer:	Green Farms	022365498	Worker:	
Address:	Green Farms- -Home Farm 1725 Kakaramea Road Hamilton	Tanker: #99001	Vehicle:	Harvester
Site Contact:	Floyd	022365498	Implement:	
			Task:	Harvester

Job Date:	29/06/2016	Est. Job Size:	5 Ha
Weighed:	Yes	Target Tonnage:	5
Crop Yield:	Light	Est. Loads:	10
Cover:	Yes	Inoculant Type:	Pioneer 1174 (MultiCrop)
Mow Own:	Yes	Stack Type:	Stack
Job Comments:	Floyd will mow 27/6		

Tasks	Worker	Vehicle	Implement	Size	Hrs
Raking	ColinF	FendT	Rake	5 Ha	
Harvester		Harvester		5 Ha	
Loader Wagon	ColinF	FendT	LoaderWagon	5 Ha	
Pit Tractor	DemiM	FendT		5 Ha	

Product Name	Store Location	Quantity	Notes

Material Name	Quantity	Notes
Polythene Black/White (12m)	m	

Example **Planting** Print Layout: use for chemical, fert or planting.

#16-0011 - Planting and Cultivation

Date: 23/06/2016

1

Source Address	Green Farms- -Home Farm - 1725 Kakaramea Road, Ngahinapouri, Hamilton		Tanker: #99001
Site Contact:	Floyd		022365498
Customer:	Green Farms	022365498	Worker:
Address:	Green Farms- -Home Farm 1725 Kakaramea Road Hamilton	Tanker: #99001	Vehicle:
Site Contact:	Floyd	022365498	Implement:
			Task: Roll-Seed-Roll

Job Date:	23/06/2016	Est. Job Size:	3 Ha
Spray Contractor:	Own	Spray Date:	
Seed Supplier:	Customer	Fert Supplier:	Customer
Seed Type:		Fert Type:	Urea
Seed Rate:		Fert Rate:	
Own Ground Work:	Yes	Ballance Order #:	
Plant Type:	Plantain		
Job Comments:			

Date	Start Time	Finish Time	Down Time	Details
Hectares:				
Materials Used:				
Comments:				

Fert Type	Start Weight	Finish Weight	Subtotal	Seed Type	# Bags
Total :				Total :	

Example **Baling** Print Layout: use for grass or maize

#16-0001 - Baling

Date: 22/06/2016

1

Source Address	McDonald & Sons -Home Farm - 190 Collins Road, Temple View, Hamilton		Tanker: #99000
Site Contact:	Bill		027654321
Customer:	McDonald & Sons	027654321	Worker: GeorgeC
Address:	McDonald & Sons -Home Farm 190 Collins Road Hamilton	Tanker: #99000	Vehicle: JDT
Site Contact:	Bill	027654321	Implement: KBaler/Wrapper
			Task: Bale/Wrap

Job Date: 22/06/2016 Est. Job Size: 10 Ha
 Crop Yield: Estimated No. of Bales:
 Bale Type: Chopped Mowing
 Inoculant Type:
 Job Comments:

Tasks	Worker	Vehicle	Implement	Size	Hrs
Mow	GeorgeC	JDT	CIMower	10 Ha	
Rake	GeorgeC	JDT	Rake	10 Ha	
Tedder	ColinF	FendT	Tedder	10 Ha	
Bale/Wrap	GeorgeC	JDT	KBaler/Wrapper	10 Ha	
Loading	ColinF	FendT	TrailerFlat	10 Ha	
Stack	GeorgeC	FendT		10 Ha	

Product Name	Store Location	Quantity	Notes

Material Name	Quantity	Notes
Polythene Black/White (12m)	20 m	