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)

Overview

Supply as much of this information as you can from your existing accounting system or database.

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 in the subject line.

If you have any questions call us on:

0800 562 008

What file types can be saved and sent?

If possible save your information as a .csv or .xls (any excel) file type. If you're not sure how try sending the format you have and we will see if we can work with that.

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 of Information Required

Typically you should be able to export from your accounting system or database the following -then with some data massaging we can then import it. You don't need to strip the information down, just send it as it is and we will come back to you if we have any questions.

If you don't have this information rather than painstakingly entering it into a spreadsheet you can enter it straight into JobFlow – ask us how.

- **Customer (Billing) Information**:
  - Trading name, customer first name, customer last name, billing address 1, billing address 2, Town/City, Region, Postcode, billing email, billing phone, billing mobile, account no (where applicable)
- **Site Locations:** (physical addresses where work is carried out, often with the above one file for both is ok)
  - Site Name eg homefarm 12 Good Rd, Tanker no, Site address 1, site address 2, Town/City, Region, Postcode, Contact 1 Name, Contact 1 Mobile, Contact 1 Phone, Contact 1 Email, , Contact 2 Name, Contact 2 Mobile.

You may also find it easy to provide this information from your system, if not filling out our **Job Template form** will give us enough information to get you started and you can add more as you go.

- **Products, Materials and Services:** Stock and Services for your invoice line items and stock tracking.
  - ItemCode, Item Sales Description, Sell $, Unit, Category (where is it used eg baling, silage, cartage etc), Type (choose one) -Product (is tracked) -Material (not tracked) -Service?
- **Resources:** Workers, Vehicles and Implements may come from payroll and asset lists.
  - Resourse Id (asset id or payroll id), short name (to view on calendar), Full Name, Notes (if applicable) type of resource (pick one-worker, vehicle, implement) sub-type eg tractor, rake, harvester etc

To complete your basic set-up (you will refine this over time) the only other key piece of information is how you would like to bring this together on a Job Template. Copy the attached Job Template over and complete for all Job Types you would like to have set up initially. You can add more later on yourselves

- **Job Templates** (you may have several variations of each eg Grass Silage, Maize Silage)
  - Baling
  - Silage
  - Cartage
  - Planting and Cultivation
  - Other