

Welcome to JobFlow!

While on your free trial you can access JobFlow with the following details:

URL: prod.jobflow.nz or (https://prod.jobflow.nz)

Username:

Password:

Trial Data

We imported what we can of your data (or demo data) supplied and will work together to refine this data over time. We will go over the data -particularly job templates, teams, attributes, resources, stock (all under settings) as these create the links or relationships to make job entry and management magic happen!

Getting Started

For now we want to get you started so this training guide focusses on:

- 1. How to create a Job
- 2. How to add a Customer
- 3. How to add Site Locations (and link them to your customer)

Next we will look at ...

- 4. Scheduling Work
- 5. Printing Job Cards

..and then

- 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!



1. CREATE A JOB

From the Dashboard select **Create a Job**...there are 4 easy steps:

🔅 JobFlow	Dashboard	Jobs	Customers	Sites	Schedule	Job Cards	Reports
Home / Dashboard							
Dashboard							
Job List ^{View all jobs}				Create J Create a new Jo			
 Pick a Customer (customers can be added on the customer tab) Pick a Job Template (job templates are set up under settings in "templates") Enter Expected Job Start Date "Job Date" Enter Est Job Size 							
Customer Search for a customer X	2 Job De Job Tem		ect Job Template	Ja	ob Status	New	¥

Secondary Customer?	3 Job Date	ä	Est. Job Size	•
	Order #			
Related Job Job #	Job Comments			
300 #				
			7	

New Job

- The first **site location** attached to the customer automatically loads by default you can "x" remove this and add another site if need be.
- You can fill in more details if you have them its best to leave the Job Status =New until you have all the details you need to send someone out to do the job. New is designed to be a scratch pad to get the job in their easily and come back to it when you are sitting still and can get all the information you need.

Booked Job

When you have all the details you need change the status to booked... this will make the job available to be scheduled.



2. HOW TO ADD A CUSTOMER

From the main menu select **Customers**

🔅 JobFlow	Dashboard	Jobs	Customers
Home / Customers			

On the right hand side select Create Customer

Create Customer

Complete as much information as you can...

New Customer

Details	Billing Address	
Trading Name	Customer No.	
Customer First Name	Address Line 1	
Customer Last Name	Address Line 2	
Phone	Town/City	
Mobile	State/Region	
Email	Country	New Zealand 🔹
	Postcode	

..and make any notes that are relevant to the customer.

Notes

- The Customer record is primarily for billing purposes the information that you enter here carries through to your invoicing.
- JobFlow keeps the information simple so there are very few rules set your own according to what is important to you.
- Work Sites are loaded next so come back to add the work site locations after you have these set up.
- Don't forget to select Create Customer to save!



3. HOW TO ADD A WORK SITE or SITE LOCATION

From the main menu select Sites

DobFlow	Dashboard	Jobs	Customers	Sites	
Home / Sites					
On the right hand side select Create Site					

Create Site

Complete as much information as you can or is relevant for you.

Address Location		Con	tact Info	
Site Name		Cont	act #1 Name	
Tanker Number		Cont	act #1 Phone	
Address Line 1		Cont	act #1 Mobile	
Address Line 2		Cont	act #1 Email	
Town/City		Cont	act #2 Name	
State/Region		Cont	act #2 Phone	
Country	Select an Option 🔹			
Postcode				

..and make any notes that are relevant to the site.

Notes

- Site Locations reference Google Maps to display a map and a route between sites on a job so look up the address in Google Maps and enter it as it appears there to get the best results.
- Sites don't have to be related to a customers farm or run-off, you may have a depot, quarry or sawmill that material needs to be collected from all of these should be entered as a site location.
- When you have loaded all of a customer's sites which may include home farm, run-off neighbours block that they often harvest go back to the customer record and add the sites there. The first site you add will become the default site on a job (but can be changed when you create a job.
- Don't forget to select Create Site to save!