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)**

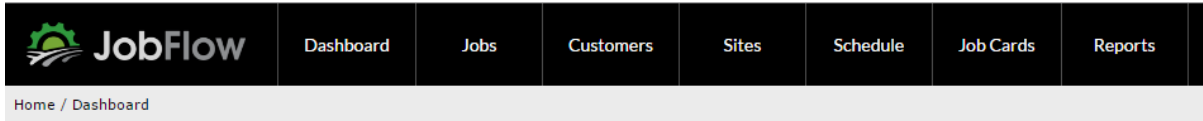Next we will look at …

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)

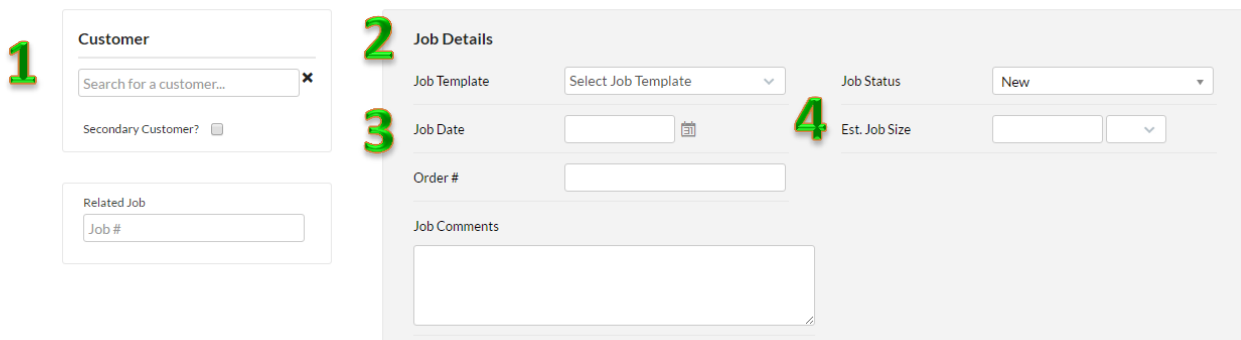By then you will be a JobFlow pro!

1. CREATE A JOB

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

1. **Pick a Customer** (customers can be added on the customer tab)
2. **Pick a Job Template** (job templates are set up under settings in "templates")
3. **Enter Expected Job Start Date "Job Date"**
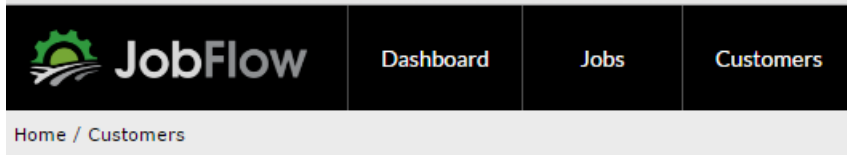4. **Enter Est Job Size**

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**

On the right hand side select **Create Customer**

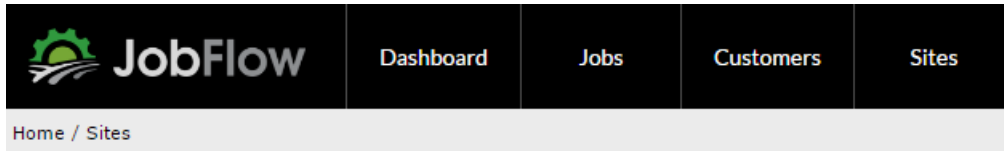Complete as much information as you can…

..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**

On the right hand side select **Create Site**

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

..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!**