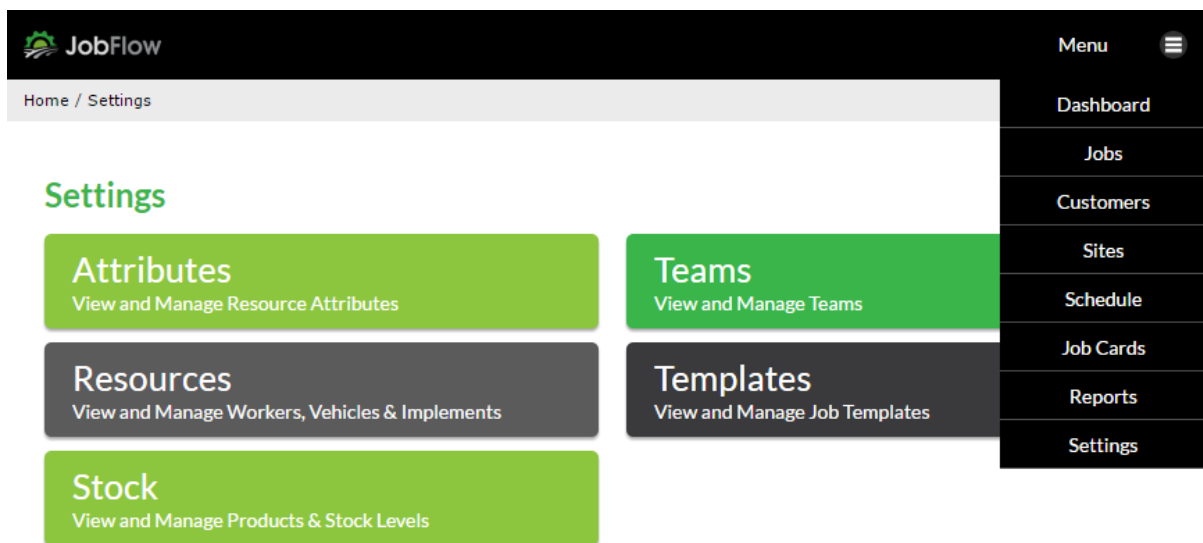## JobFlow – Refining your settings

To be a JobFlow pro you will want to know how JobFlow works and be able to change these settings yourselves.

We've only recently made these available to office level users so the Settings interfaces still need a bit of work. We like you being in control of your information.

Here is an overview of each area, while you are in trial mode have a play with these settings, be patient with the glitches and tell us what else you need so we can finish this area off.

You will find **settings** as the last item in the main menu.

Templates

Job templates bring together the tasks and information you need to be able to create and manage jobs.

Job Template → **Tasks** →

What attributes or resources do I need?

How will I be charged?

What information do I need to collect?

→ **eg. a mow task needs a mower**

Charge-out Rates for tasks + Products, Materials and Services I expect to use.

Select Job Type and Print Job Card Layouts to collect the right data.

Stock (Products, Materials or Services)

JobFlow has a basic stock management system.

It is designed to be able to help you add products, materials and services to your jobs as well as monitors your stock levels across multiple storage locations.

You can buy or sell products for those occasions where you by standing hay/maize and store this for sale later.

Attributes

Attributes either belong to a resource (where they can say I am a, or have a) – or require an attribute in another resource (where they can say I need a…) e.g.

CIMower → FendT → BradP
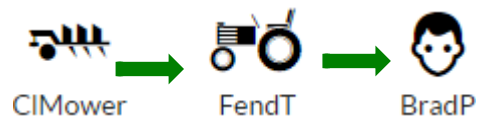
Task (on Template):
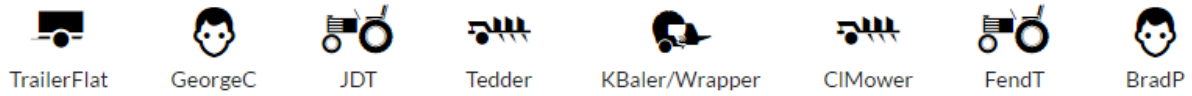
I am a mow task   **Resources:**

I need a mower →   I am a mower

I need a tractor → I am a tractor

I need x license driver → I am a x license driver

Resources are workers, vehicles or implements required to carry out a job. They all have attributes and/or need resources with specific attributes.

TrailerFlat	GeorgeC	JDT	Tedder	KBaler/Wrapper	ClMower	FendT	BradP

Teams bring together groups of resources so jobs can be assigned by default (dragging and dropping a job into a team) on the scheduler.

Name your team and select a job template to apply that team to. Then choose show tasks and assign resources to each so when you drag and drop a job into that team on the scheduler it will assign those resources by default.

Brads Baling

Team Name	Brads Baling
Active	✔

Baling   5/6 Assigned
                                                                            Hide Tasks

Task	Worker	Vehicle	Implement	Clear
Mow	GeorgeC - George Clooney	JDT - JD Tractor	ClMower - Claas Mower	X
Rake	GeorgeC - George Clooney	JDT - JD Tractor	Rake - Rake	X
Tedder	BradP - Brad Pitt	FendT - Fendt Tractor	Tedder - Tedder	X
Bale/Wrap	GeorgeC - George Clooney	JDT - JD Tractor	KBaler/Wrapper - Kv Baler/Wrap	X
Loading	BradP - Brad Pitt	FendT - Fendt Tractor	TrailerFlat - Flat Bed Trailer	X
Stack	GeorgeC - George Clooney	FendT - Fendt Tractor	Select Implement	X

Clear