

# Job Tracker Professional User Manual

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## Job Tracker Professional



Figure 1

**Sherwin Business Systems Ltd**  
**Tel: 01255 435314**  
**Email: enquiry@sbsystems.co.uk**

# Job Tracker Professional User Manual

## Installation

Job Tracker Professional will run on the following Microsoft platforms: Win 98, Win ME, XP home and Professional, Win 2000 Professional and server.

**Internet Downloads:** Double Click on Setup.exe and follow the on-screen instructions.

**CD-Installation:** After inserting the CD the installation program should automatically run. If it does not, using Windows Explorer, navigate to your CD Drive and double click on Setup.exe

*Note: You need to have administrative rights on your computer to install any software.*

## Hardware Requirements

A screen resolution of at least 1024 x 768 is required.

An Ethernet or Wireless network if you wish to share data across multiple computers.

A VPN connection if you wish to share data across multiple buildings.

## Software Requirements: (Optional)

Job Tracker Professional uses MS Word and MS Excel in the creation of Job Sheets, Estimates, Purchase Orders and Invoices. MS Word and MS Excel is required if you wish to use any of these features.

Once the software is installed a shortcut called *Job Tracker Pro* will be placed on your desktop and on the Programs Menu under S B Systems.

To uninstall the software go into Control Panel. Click *Add / Remove Programs*. Scroll down the list of software and select *Job Tracker Pro* then click *Remove*

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The *Job Tracker Pro* shortcut.

## Logging On

The trial version of Job Tracker automatically logs you on as Administrator and gives you access to all areas of the software.

The first time you run Job Tracker Professional after entering your licence key you will be promoted for a Username and Password. The software ships with the following details.

**Username:** Administrator

**Password:** letmein

## Creating and editing users.

### Adding New Users

Job Tracker supports multiple users and multiple security levels.

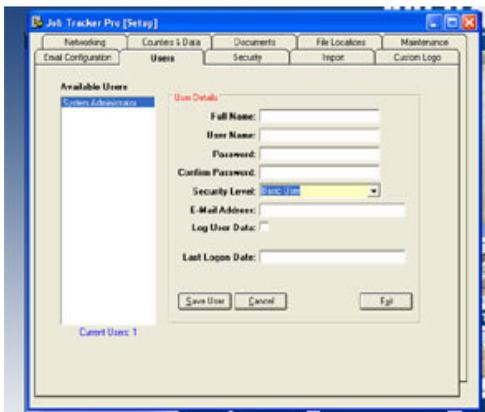


Figure 2

To add a new user, from the front screen click on **Control Panel** then click on the *Users* tab.

Click the New User button

Enter the user details in the boxes provided.

The *User Name* and *Password\** are what the

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user will log into Job Tracker with.

Select a Security Level \*\*\* appropriate for this user.

Click *Save User*

Log User Data \*\*

To edit a user simply double click on the name in the list of **Available Users** and change the details as required.

\* Password is optional, \*\* For future use. \*\*\* See Security Settings

## Security Settings

From the front screen click on *Control Panel* then click on the *Security* tab

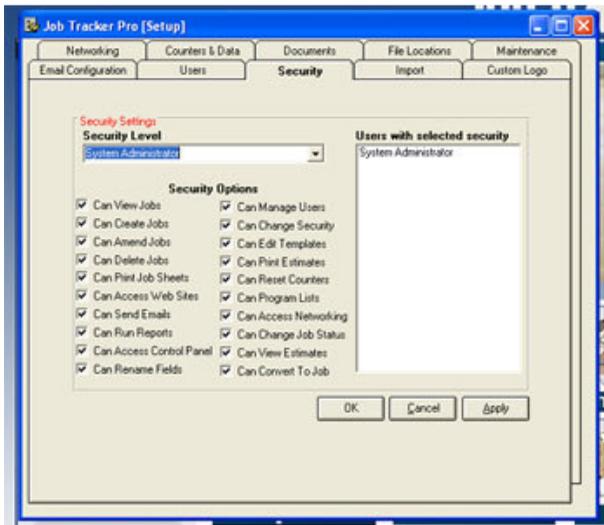


Figure 3

Job Tracker Pro looks at security in a new way. Rather than the system telling you what security levels can do what, you tell the system what you want each security level to do.

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Select the security level you want to program from the drop down box labelled *Security Level*.

All users which have the selected security level will be displayed in the right hand side list.

Simply tick the boxes you want each security level to have and click Apply.

As soon as a user logs on they will automatically have the access rights that are assigned to their specific security level.

## Pick Lists

Job Tracker Professional uses pick lists to give you access to a list of common data, .e.g. Sales Reps, Job Status, Marketing Source plus many others.

### Programming Pick Lists



The screenshot shows a software interface with several pick lists and input fields. On the left, there are dropdown menus for 'Marketing Source' (Local Paper), 'Sales Rep' (Paul Jones), 'Job Booked By' (Julia), and 'Job Category' (Category 1). Below these are text input fields for 'Order No' (EL7664) and 'Customer Ref' (657564/43). On the right, there are three columns of pick lists: 'Serial Number', 'Internal Ref', 'Shipping Ref', and 'Purchase Ref', each with an 'Unused' checkbox. Below these is a 'Job Notes' section containing the text: 'System Administrator, 22/09/2006, 14:41:09 Called Mrs Jones and agreed to the 28th'. At the bottom, there is a 'Quick Search' field and a red error message: 'The assigned engineers do not have the following reqs: CKR1,HTR1,UMHQ'.

Figure 4

Pick Lists are fully programmable and can contain anything you wish.

Figure 4 shows a sample of Pick Lists which are available on the Job Screen.

The titles of the Pick Lists are also changeable.

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Before programming the Pick Lists it's a good idea to have a look at the Jobs Screen and change the name of the pick lists to something more applicable to your own company. You can change the name of a Pick List simply by double clicking on its label from the Jobs Screen. This change will automatically be made available to other parts of the software.

To program a pick list, from the front screen, click on Pick Lists and the screen in Figure 5 will be displayed.



Figure 5

Clicking on the arrow button to the right of Available Pick Lists will show you all the lists used in Job Tracker Professional.

**For this example we'll pick the *Job Status* and add a new entry.**

Pick Job Status from the drop down list.

Click the *New* button

Type the new Job Status that is applicable to your company

Click the *Save* button

## Job Tracker Professional User Manual

The new Job Status will now be available as an option when you click *Update* on the Jobs Screen.

To edit an existing entry just double click on it and follow the steps above.

You can come back to the Pick List editor at any time and makes changes which will be made available instantly to all connected computers.

### **Available Pick Lists**

Job Tracker Professional ships with 12 separate pick lists which are fully programmable.

The default 12 available lists are used in the follows screens.

<b>Description</b>	<b>Used In</b>
Call Taken By	Jobs & Estimates
Chase Next Action	Jobs & Estimates. Used in the Call Tracking tabs
Chase Result	Jobs & Estimates. Used to describe the result of a call
Chase Type	Jobs & Estimates. Used to group calls
Estimate Status	Estimates. Used to describe the status of the estimate
Job Category	Jobs. Used to group various jobs
Job Status	Jobs. Used to describe the status of the job
Marketing Source	Jobs. Used to track marketing
Purchase Status	Purchase Orders. Used to describe the status of the Purchase Order
Sales Rep	Jobs, Estimates. Used to show who made the sale
Skills & Qualifications	Jobs & Estimates. Specify what skills are required for a job.
Stock Units	Stock Control. Used to specify the unit of supply, e.g. Each, Ph, Ltrs etc

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## Creating Jobs

### The Jobs Screen

Trial Version of Job Tracker, you currently have 0 jobs entered

Job Status: **New** [Update] | Job No: **1000** | Invoice No: **Not Issued** | Exit

Buttons: New Job, Delete, Job Complete, Search Jobs, Print Job Sheet, Print Invoice, Show Estimate, New Purchase

Tabs: Job Details, Client Details, Documents & Emails, Call Tracking, Purchase Orders

**Job Site Address and Contact Details**

Name: Mrs Jones [Pick] | Site Address: 123 Park Road Newcastle NW1 9AA | Site Contacts: May Jones | Telephone: 01234 654987 | Mobile: 07911 987654 | Fax: | Email: jr@bsystems.co.uk | Website: [Zoom]

**Engineers assigned to this job**

Sam Sherwin | Assign | Remove

**Special skills required for job**

CEN1, DAH1, MET1 | Assign | Remove

**Job Details and Requirements**

**Job Details** [Pick]

DID YOU KNOW!  
Double clicking on any field name allows you to change the wording.  
PRESSING SHIFT and CTRL and clicking in a box allows you to configure that box for colours, size, type of data plus more.

**Parts and costings for Job**

Qty	Part #	Description	U Price £	Total £
2.5	Labour Rate	Labour Rate A	45.00	112.50
3	Labour Rate	Labour Rate B	27.00	81.00
2	6303	Gas Tap with Flame Supervision Devic	12.05	24.10
1	NDCOUR	Next Day Courier	14.99	14.99

Add Item | Remove Item | Net £ 232.59 | VAT £ 40.70 | Gross £ 273.29

**Additional Job Details**

Marketing Source: Local Paper | Serial Number: 54332/43 | Unused  
Sales Rep: Paul Jones | Internal Ref: Unused  
Job Booked By: Julia | Shipping Ref: Unused  
Job Category: Category 1 | Purchase Ref: Unused  
Order No: 6546456 | Job Notes: System Administrator, 14/09/2006, 10:30:33 : Called client, no answer, trying again tomorrow  
Customer Ref: System Administrator, 14/09/2006, 10:37:50 : Called client and agreed access date.

**Job Associated Dates**

Created: 14/09/2006 [Pick] | Completed Email Sent: 14/09/2006 [Pick] | Annual Recall: 14/09/2006 [Pick]  
Quote Sent: 14/09/2006 [Pick] | Completed: [Pick] | Recall Reason: [Pick] (Call client to see if they are interested in an annual maintenance call.)  
Order Received: 14/09/2006 [Pick] | Invoiced: [Pick]  
Due: 18/09/2006 [Pick] | Invoice Paid: [Pick]

Quick Search | All required qualifications / skills are met by the assigned engineers | Est No: N/A |  Job Finished & Closed

Figure 6

The Jobs screen is accessible by clicking on the JOBS button from the front screen. You will be presented with the screen in Figure 6.

*You can rename almost all fields in Job Tracker simply by double clicking on the field caption and typing in your new description. All search boxes and reports will automatically display your new description.*

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Although, at first glance, the Jobs Screen may look a little intimidating with a little practice you'll soon see just how easy it is to use.



**Figure 7**

All the main events you would want to do with a Job are all available from the top of the Jobs Screen. The first two buttons change, depending on which state the Job is in.

**New Jobs** Simply Click the **New Job** button and start entering your job details.

**Job Complete:** This button allows you to automatically send a Job completed email to the customer. The contents of the email are formatted using *Control / Panel & Email Configuration* see page 50

**Search Jobs** Here you will be presented with a new search window where you can search for specific jobs. You can search for any field in the jobs screen and type as little or as much as your like.

## **Print Job Sheet & Print Invoice**

Pressing these buttons will create and print a Job Sheet or Invoice as appropriate. The templates linked to these buttons are configured in the **Control Panel / Documents**. You can also issue documents by clicking on the Documents tab and picking a template from the list provided.

## **Show Estimate**

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Pressing this button will display, if applicable, the estimate that this job was created from. If this job was created without an estimate a message will be displayed saying so.

## ***New Purchase Button***

Clicking here will enable you to create a new purchase order; all items purchased will automatically be assigned to the currently loaded job. See page 33 for details of creating Purchase Orders

## ***Quick Job Searching***

At the bottom left of the Jobs Screen there is a quick search box. Pressing Alt / Q while in the Job Screen will take you directly to the quick search box where you can type in the Job Number and press return to quickly load the job.



**Figure 8**

There are 5 main tabs on the screen which separate various aspects of the job into easy categories.

## ***Job Details Tab***

This is where the main data that relates to your job is entered. This tab is also split into 4 sections, again making it easy to discuss and distinguish the various aspects of the job screen.

### **Job Site Address and Contact Details**

Just under the *Jobs Details* tab you will see a frame labelled *Job Site Address and Contact Details*. This frame holds the address and contact name / details of the address where the work will be carried out.

## **Job Tracker Professional User Manual**

You can either type the details directly into these fields or you can click the *Pick* button and select a previous customer / site address.

### ***Jobs & Emails***

Job Tracker has an embedded SMTP server, this basically means it can send emails directly from within the software rather than relay on an external email client such as Outlook or Outlook Express. Clicking the @ button to the right of the Email field will display an email form which allows you to send an email. \*

Clicking on the globe button to the right of the Website field will automatically take you to the web site address in the field. \*\*

- \* You need to setup you the SMTP details in the Control Panel first
- \*\* Providing you have sufficient access right to view websites

Any contact details entered in the Contact Details frame will automatically be saved and made available for future use.

### ***Engineers assigned to this job***

To assign engineers to a job simply click the Assign button within the *Engineers assigned to this job* frame and you will be presented with a list of available engineers.

The list of available engineers comes from the engineer's setup in the Engineers section of the software. \*

To add a new engineer to the system, click Engineers on the top menu from the Front Screen.

As Job Tracker Professional has been developed to be as flexible as possible you can of course use this list for something other than engineers. See page 26 for full details on adding new engineers.

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## ***Special Skills Required For Job***

To assign special skills to a job simply click the Assign button within the *Special Skills Required For Job* frame and you will be presented with a list of available special skills.

At the bottom of the Jobs screen is a message which will tell you whether all the required skills have been met for the current job.

Additional skills can be programmed using the Pick List Editor, see page 8

\* To add a new engineer, click Engineers on the top menu from the Front Screen.

## ***Additional Job Details***

The first four boxes under Additional Job Details are pick lists. These are fully programmable, see programming pick lists on page 8

Like most fields in Job Tracker Professional you can easily use these pick lists for something other than what they were designed for. Simply double click on the label above the field and type in the new description.

All reports and search boxes will automatically show your new description.

## ***Job Details and Requirements***

The Job Details box is where you can enter the specific details of the job. If you often have similar types of jobs, then clicking on the *Pick* button enables you to save the job details for picking again in the future.

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## Parts and Costings for Jobs

Figure 9

Job Tracker has a simple yet effective stock control system, which, enables you to pick items from stock. All items created in Job Tracker are available to Jobs, Estimates, Invoices and Purchase Orders.

Labour costs, Courier Services and any other type of service items can all be handled as an item of stock.

The Net, VAT and Gross values are all displayed at the bottom of the parts list showing you at a glance the current cost of the job.

## Importing Stock Items

The system also caters for importing supplier stock lists. These are normally provided in a CSV format. See *Control Panel / Import* for further details. Page 61

## Adding a stock item / part to a Job

Qty	Part #	Description	U Price £	Total £
2.5	Labour Rate	Labour Rate A	45.00	112.50
3	Labour Rate	Labour Rate B	27.00	81.00
2	6303	Gas Tap with Flame Supervision Devic	12.05	24.10
1	NDCOUR	Next Day Courier	14.99	14.99

Net £ 232.59    VAT £ 40.70    Gross £ 273.29

**Job Associated Dates**  
 Created 14/09/2006    Completed Email Sent    Annual Recall 14/09/2006

Figure 10

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Click the *Add Item* button

The stock control screen will appear. Here you can search for the part you're interested in. You can search by Suppliers Part Number, Internal Part Number and Description.

To search for a specific part simply enter the part number or description and click the search button. If you're interested in parts by a specific supplier, you can select the particular supplier using the pull down box labelled *Filter By*. If you just want to look at all your stock leave the *Search For* blank and simply click the *Search* button. Displaying all stock items can be a slow process if you have thousands of items.

Once you have a list of items on the screen you can simply double click an item and you will be shown a close up of its details.

To add the item to your job, estimate or purchase order just click on the *Use Item In Job* button near the bottom of the screen.

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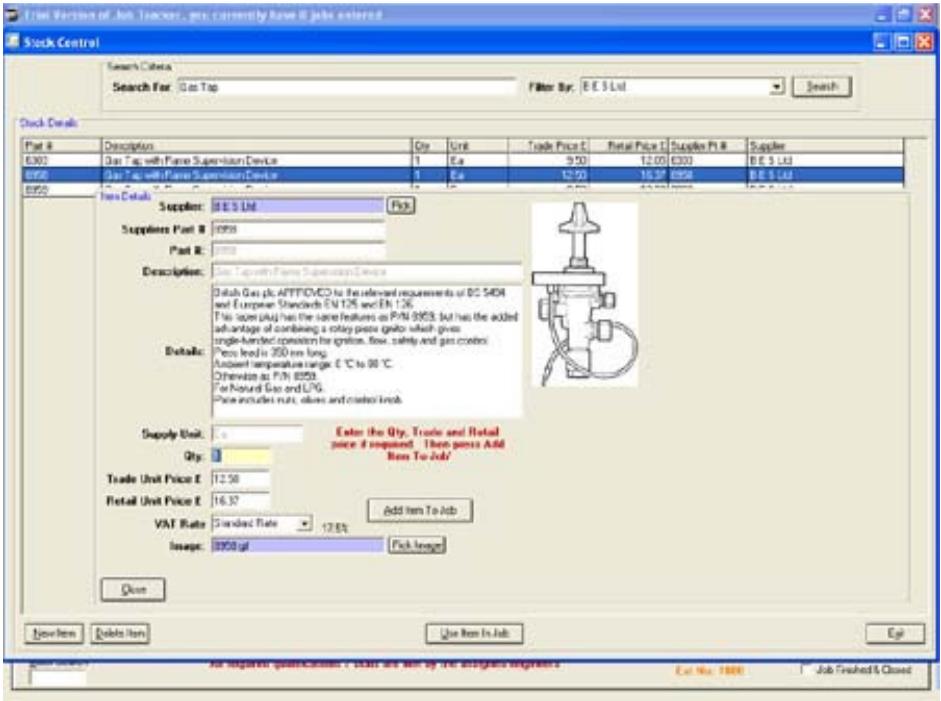


Figure 11

After pressing the **Use Item In Job** button you will be able to specify the quantity you need, as well as being able to change the trade and retail prices. Once you're happy with your selection just click the **Add Item To Job** button. You will be taken back to the Jobs screen and the item will be displayed in the Items List.

## Adding Labour Costs To A Job

Labour costs are stored in the stock system just like any other item that can be assigned to a job. The system ships with 2 labour rates pre-programmed, however you can add as many labour rates as required.

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Click the **Add Item** button in the Jobs Screen. In the **Search For** box type Labour and click **Search**. You will see a list of existing labour rates. Like any other item just double click the labour rate and click the **Use Item In Job** button. You will now be able to change the Qty, i.e. the number of hours and the hourly rate if applicable. Clicking **Add Item To Job** will take you back to the jobs screen and the new labour costs will appear in the items list.

For further information on creating new items please refer to the section on Stock Control.

## **Client Details**

The Client Details tab enables you to specify who supplied the job. This is normally used for 3<sup>rd</sup> party refers such as Insurance Companies, Local Authorities, Sub Contractors etc. However like most things in Job Tracker you can use this screen for anything you like.

This screen is very similar in use to the **Job Details** tab. i.e. Double clicking on any field name allows you to change the title and use the field for something else.

The **Pick** button along side the Contacts field enables you to pick any previously entered contact names relating to this client. This can be useful when you deal with the same company a lot but the person handling the job often changes.

Like the rest of the Job Tracker screen, everything you see on this screen can be automatically inserted into a Job Sheet, Invoice, Purchase Order and Estimate.

# Job Tracker Professional User Manual

See working with document templates for further information. Page 55

## ***Documents & Emails***

The documents & emails tab shows all documents, for the currently loaded job. You don't need to worry where they're stored; Job Tracker takes care of all that.

Any documents that have been created will be displayed in a list along with a few details of when, who and what was printed.

To view or edit an existing document simply double click on the document in the list. The relevant program will start up i.e. MS Word™ or MS Excel™ showing the selected document.

## ***Creating New Documents***

Clicking on the *New Document* button near the bottom of the screen enables you to send out a new document, MS Word or Excel. You will see a pull down list which contains all the document templates that Job Tracker knows about. The software ships with 5 sample templates but you can of course completely design you own and Job Tracker will use them.

You can optionally type a description for the new document in the space provided. Once you're happy with your selection just click the *Create* button and the document will be created and displayed.

All fields that are visible on the various Job Tracker screen can be automatically inserted into documents.

See working with document templates for further information. Page 55

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## Call Tracking

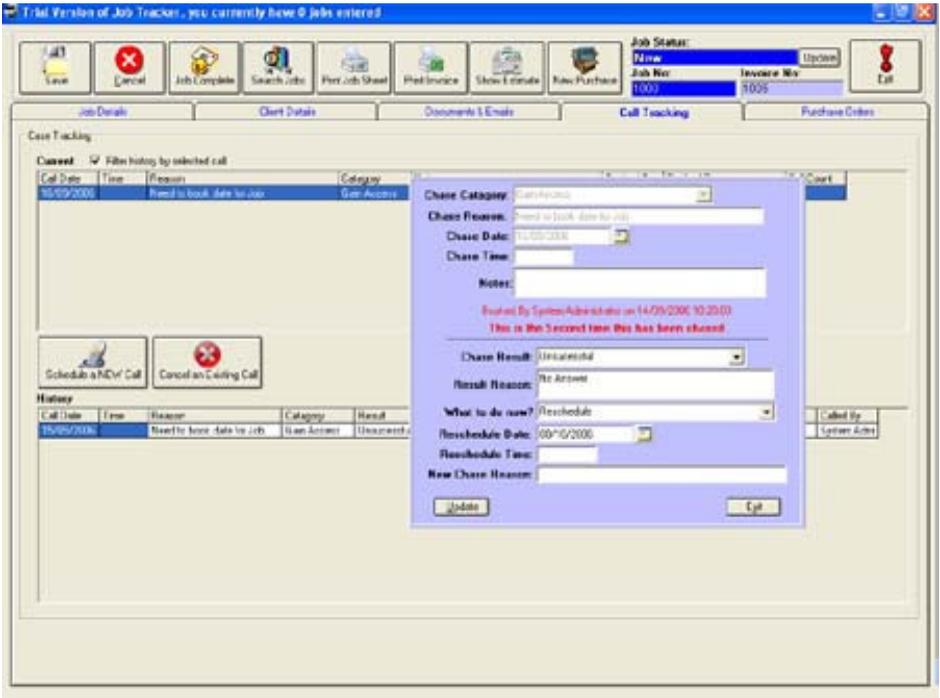


Figure 12

The Call Tracking tab is like a computerised diary system where you can enter events that you need to be reminded off. Throughout this manual we will talk about telephone calls with Call Tracking, however you can use this feature to remind you about anything you wish.

The screen is split into two parts, top and bottom. The top section shows all reminders that are currently in place to go off at some point in the future.

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The bottom section shows a history of all reminders that have been dealt with at some time in the past.

By ticking *Filter history by selected call* the history list will show only historic events relating to the selected call.

## ***Placing a new reminder***

Click the *Schedule a NEW call* button. A new window will pop up where you can enter the details of the reminder.

**Chase Category:** This Pick List enables you to group your reminders into various categories, making your tracking easier. The pick list is fully programmable by you using the Pick List Editor. See page 8

**Chase Reason:** This box is where you can type in the reason for the reminder, e.g. 'Need to arrange time for access' 'going home early' or anything you wish.

**Chase Date:** Here you can specify the date to be reminded on. To save time you can simply enter +3 for 3 days +7 for 7 days etc. The software will automatically calculate the date you need.

**Chase Time:** The time of the reminder. 24hr format.

**Notes:** You can type in a few notes relating to the reminder if you wish. These, like most other fields, are optional..

Once your happy with your entry just click the *Save* button. The new entry will appear in the top section of the screen.

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## ***Chasing A Reminder***

Reminders will be notified to you, normally, via the *Things To Do* screen, and will, when appropriate, take you directly to the Job in question.

To action a reminder simply double click on the event in the list. Another window will pop up showing you all the necessary information and enabling you to chase or action the reminder.

This example assumes you are on the phone and chasing up a telephone call. But again you could use this for anything you wish.

Double click a previously entered call in the Current list. A new window will pop up as shown in Figure 12, Page 21.

The top section of this window shows the details of the reminder when it was first created. This section of the screen is for viewing only, i.e. you cannot make any alterations to the reminder here.

In the middle of the screen is a message telling you how many times this event / reminder has already been actioned / chased.

**Chase Result:** This pick list enables you to tell the system the result of the call, e.g. Successfully, Unsuccessful etc. These options are fully programmable by you via the Pick List Editor See page 8

**Result Reason:** Here you can type a few notes relating to the result of the call. E.g. No Answer, Agreed to an access date etc.

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**What to do now?** Here you tell the system what you want to do next. In the event of an unsuccessful call you will most likely want to reschedule it. All options available via the list are once again fully programmable by you via the Pick List Editor. See page 8

**Reschedule Date:** This is the date you want to reschedule the reminder for, if applicable. Again +1, +2 etc will add that number of days onto the current date.

If the call was successful and you are now finished with it, just leave the **Reschedule Date** blank and the system will close it down.

**New Chase Reason:** This field is optional, if you leave this blank the system will automatically reschedule the event using the original description / reason. If you would like to enter a new reason for the reschedule then this is where you would put it.

When you're happy with your entry, just click the Update button. If you closed the reminder it will simply be placed in the History list. If you rescheduled another reminder a new event will be placed in the Current list and the previous reminder will be placed in the History list.

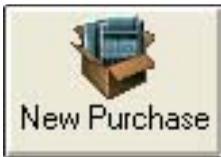
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## ***Purchase Orders***

The **Purchase Orders** tab shows you a list of all orders that have been placed for the currently loaded job.

Double clicking on an entry in the list will bring up the appropriate Purchase Order.

Ticking the **Do Not Show Closed Orders** box will show only Purchase Orders which are live. i.e. Still awaiting delivery.



To create a new purchase order from within a Job simply click the large Purchase Order button

For more information on creating purchase orders please see the Creating Purchase Orders section on page 33

## ***The Job Status, Changing The Job Status***

Clicking the ***Update*** button at the top right of the Jobs Screen will present you with a list of available job status options. Simply select the appropriate status and click the ***Change Status*** button.

The Job Status list is programmable by you via the Pick List Editor. See page 8

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## Entering Estimates

For ease of use the estimates screen is practically identical to the Jobs Screen in the way it looks, feels and is used.

There is an additional button in the estimate screen labelled **Convert To Job**. Pressing this button will, as expected, convert the estimate to a Job and assign the next Job Number, or in the case of manual numbering you will be prompted for the next job number.

The estimate screen also has its own Documents and Call Tracking screen which again is identical to the Jobs screen.

For detailed information on using the estimate screen please read the section on Entering Jobs, see page 11

The default estimate template which is used when the *Print Estimate* button is used is configurable via the Control Panel / Documents. See page 55

## Adding New Engineers

Job Tracker Professional can handle up to 32000 engineers. Engineers are added / edited by clicking on *Engineers* from the menu at the top of the front screen.

The system also enables you to specify, if applicable, any industry skills, training and qualifications the engineer has gained that might be required for a particular job.

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## The Engineers Screen

Days	From	To	Hourly Rate: £
<input checked="" type="checkbox"/> Mon	08:30	17:00	17.5
<input checked="" type="checkbox"/> Tue	08:30	17:00	17.5
<input checked="" type="checkbox"/> Wed	08:30	17:00	17.5
<input checked="" type="checkbox"/> Thu	08:30	17:00	17.5
<input checked="" type="checkbox"/> Fri	08:30	17:00	17.5
<input type="checkbox"/> Sat	08:30	17:00	17.5
<input type="checkbox"/> Sun	08:30	17:00	17.5

Description
<input checked="" type="checkbox"/> CCN1
<input checked="" type="checkbox"/> CEN1
<input checked="" type="checkbox"/> CKR1
<input checked="" type="checkbox"/> DAH1
<input type="checkbox"/> HTR1
<input checked="" type="checkbox"/> LAU1
<input checked="" type="checkbox"/> MET1
<input type="checkbox"/> UVHQ
<input type="checkbox"/> WAT1

Figure 13

The screen displays a list showing all engineers currently in the system.

To **edit an engineer** simply double click on the name in the list, all the relevant boxes will be filled in and you can now make changes as applicable.

To **add a new engineer** simply click the *New* button and fill in the information as applicable.

Clicking the ***Make all the same*** button takes the information from the Mon entry and copies it into all other days. You can mark a day as being “Not Worked” by un-ticking the box next to the appropriate day of the week.

### Assigning skills, qualifications to an engineer.

To mark the engineer as having a particular skill, qualification etc, simply tick the appropriate box in the ***Skills & Qualifications*** list.

# Job Tracker Professional User Manual

To add new skills, qualifications etc to the system please see page 8

## Adding New Contacts

The screenshot displays the 'Job Tracker Professional [Contact Database]' window. It is divided into several sections:

- Client Details:** Fields for Name (Essex Local Authority), Address (123 Essex Way, Colchester, Essex, CO1 9AA), Contacts (Alan Adams, Becky Booths), Telephone (01234 654321), Mobile (07911 123456), Fax (0147 963852), Email (essex@bysystems.co.uk), and Website (www.bysystems.co.uk).
- Type of Contact:** Radio buttons for 'This is a client' (selected), 'This is a customer', 'This is both a client & customer', and 'This is a supplier'.
- Additional Information:** Fields for Account No. (1232/43), Date Created (00/00/00), Last Used (04/10/2006 13:35:28), and Sage Ref # (Unused).
- Jobs History:** Checkboxes for 'Show Only Open Jobs' (checked) and 'Show Only Closed Jobs'. A date range filter is set 'Between 01/01/2006 And 31/12/2006'. A table shows one job: Job No. 1000, Date 14/05/2006, Status New, and Val £ 232.59. The total value is £ 232.59.
- Comments & Notes:** A large yellow text area containing the note: 'System Administrator: 04/10/2006 14:19:01 - Called Alan and chased the last invoice.'

Buttons at the bottom include Save, Cancel, Search Contacts, Import Contacts, and Exit.

Figure 14

Job Tracker has a built in, simplified, contacts manager. The system groups contact information into 3 main categories

- 1) Customers,
- 2) Clients,
- 3) Suppliers

The Contacts screen can be accessed by clicking **Contacts** on the left hand side panel from the main front screen.

# **Job Tracker Professional User Manual**

## ***Customers:***

Customers are defined as the location where the work / job will be carried out.

## ***Clients:***

Clients are defined as the job provider. i.e. Local Authority, Insurance Company, Sub Contractor etc.

## ***Suppliers:***

Suppliers are those who you purchase goods and services from.

*Clients and Customers can be further grouped. i.e. The system enables you specify if a client is also a customer and vice versa.*

When entering new contact information in the Jobs screen, the details will be saved as follows:

Job Details: Creates and saves contacts as Customers

Clients Details: Creates and saves contacts as Clients

Estimate Details: Creates and saves contacts as Customers

Estimate Provider: Creates and saves contacts as Clients.

Purchases: Creates and saves contacts as Suppliers.

## ***Renaming Fields***

Similar to other screens in the system i.e. Jobs Screen. You can also double click on a number of the titles in the Contacts screen and rename them to be something more applicable to your company.

# Job Tracker Professional User Manual

The **Jobs History** frame shows the total value of all jobs, between the specified dates, enabling you at a glance to see the value of any given customer or client.

You can also filter the Jobs History to show only current jobs or just closed jobs.

Double clicking on a job in the list will automatically open that job for viewing or editing.

## **Adding a new contact**

Click the *New Contact* button on the bottom left of the screen.

All the fields on the screen will be cleared and you can now enter the new details.

To specify which type of contact you are creating, just click on the appropriate option in the *Type of Contact* frame at the top of the screen.

## **Comments & Notes**

Pressing F2 in the Notes section will automatically insert the date and time as well as the logged on user name. You can type as much information here as you wish.

## **Deleting Contacts**

First search for and load the contact you wish to delete. Then press the *Delete Contact* button. Please be careful here as deleting contacts which have jobs, estimates, purchase orders assigned to them will leave orphan jobs. i.e. Jobs which are unable to display contact information.

# Job Tracker Professional User Manual

## Things To Do

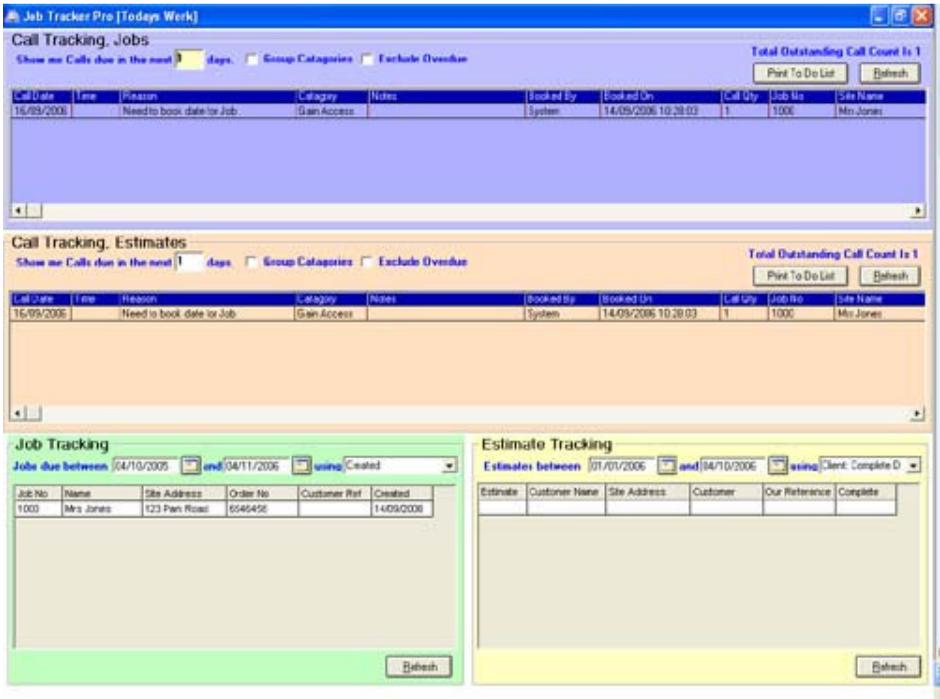


Figure 15

The Things To Do screen shows, at a glance, exactly all Jobs and Estimates that require attention.

The screen is split in to 4 sections and colour coded for easy identification.

Top: Blue: Jobs, Call Tracking / Diary Entries. See page 22

Middle: Peach: Estimates, Call tracking / Diary Entries See page 22

Bottom Left: Light Green: Job Tracking, All Dates.

Bottom Right: Light Yellow: Estimate Tracking All Dates.

# Job Tracker Professional User Manual

## ***Call Tracking, Jobs***

This section shows all reminders that have been entered into the Jobs Diary system.

To specify how many days in the future you want to see simply put the number of days in the ***Show me Calls due in the next*** box. Max 999

To group the calls by category tick the ***Group Categories*** box.  
To hide any overdue calls tick the ***Exclude Overdue*** box

*To ensure the screen you are looking at is up to date press the Refresh button.  
Applicable only in a networked environment.*

To print a hard copy of the list, just click the ***Print To Do List*** button.

## ***Call Tracking, Estimates***

This works exactly as described in the Call Tracking, Jobs section above.

## ***Job Tracking & Estimate Tracking***

This list shows all jobs that fall between the specified dates based on the date in the ***using*** drop down list.

The list titles will automatically reflect any user programmed fields as well as the user selected date from the ***using*** drop down list.

*Pressing the Refresh button ensures you are looking at the latest data. Only applicable really in a networked environment*

E.g. To see all jobs that are due in the next 30 days, select ***Due Date*** from the drop down list and set the dates accordingly.

# Job Tracker Professional User Manual

## Purchase Orders

### *Creating Purchase Orders*

Clicking on *Purchase* from the front screen will take you to the Purchase Order screen.

Again, in order to keep your learning curve down, this screen has been designed as close as possible to the Jobs and Estimates screen.

Double Clicking on many of the field names allows you to rename them, making them more applicable to your company.

# Job Tracker Professional User Manual

**Job Tracker Pro [Purchase Orders]**

Purchase Order Control Panel:

Purchase Order Status: **Pending Authorisation**  Purchase Order No: **1000**

Order Closed

**Supplier Details:**

Company Name:    
 Unit 3, Junction 6 Industrial Park  
 Electric Avenue  
 Birmingham  
 B6 7JA

Address:

Contacts:

Telephone:   
 Mobile:   
 Fax:   
 Email:    
 Website:    
 Account No:

**Purchase Order Details:**

Supplier Ref:   
 Order Date:   
 Due Date:   
 Date Received:   
 Order Taken By:   
 Created:   
 Tracking Ref:

Unused:   
 Unused:   
 Unused:   
 Unused:   
 Unused:   
 Unused:

**Notes:**  
 DO YOU KNOW?  
 Double clicking on any field name allows you to change the wording.

**Items:**

Supplier P1 No	Internal Part No	Description	Qty	Unit	Trade UP £	Retail UP £	Job #	VAT %
8993	8993	Gas Tap with Flame Supervision Device	1	Fa	9.50	12.22	0	17.5
	NDCOUR	Next Day Courier	1	Es	12.50	14.99	0	17.5

This purchase order was created on 18/09/2006 14:05:43 by Administrator

Assign all Items to Job Number:

Net Cost £: 22.08  
 VAT £: 3.96  
 Gross Cost £: 25.94

Figure 16

## Create a new Purchase Order

Click the **New Order** button at the top left of the screen.

The screen will clear and you can start entering the information as required.

Clicking on the **Pick** button next to the Company Name enables you to pick an existing supplier. You can of course just type in the details if this is a new supplier.

## **Job Tracker Professional User Manual**

The *Order Date* field is locked, i.e. you cannot type in to it. The system automatically puts the date the purchase order was created in here.

### ***Changing The Purchase Order Status***

You can change the status of the purchase order by clicking on the *Update* button next to the *Purchase Order Status* label. All available purchase order status options will be displayed. Simply pick the one you require and click the *Change Status* button.

The Purchase Order Status list is managed by the Pick List Editor, to add or change a status please see page 8

Items from the stock control system can be added by clicking on the *Add Item* button near the bottom of the screen.

The Stock Control screen which will be displayed is used exactly as described in Adding Items to Jobs, please see page 16

To remove an item from the Purchase Order, select the item from the list and click the *Remove Item* button.

### ***Purchase Orders for Specific Jobs***

If the Purchase Order screen is called from within a Job by pressing the *New Purchase* button, then all purchase items will automatically be assigned to currently loaded Job.

If the Stock Control screen is accessed via the Purchase Orders screen, you will have an extra field asking you which Job, if any, you wish to assign the item to.

### ***Purchase Order for non specific Jobs***

Assigning Job numbers to items is fully optional. To place a purchase

## **Job Tracker Professional User Manual**

order without assigning a Job Number, e.g. you may just be ordering stationary! Just leave the Job Number field blank.

### ***Printing Purchase Orders***

To print the Purchase Order simply click on the *Print Order* button.

### ***Purchase Order Template***

The Purchase Order template is configured via the Control Panel / Documents. See page 55

The total value of the purchase order is displayed at all time at the bottom right hand of the screen. The prices here are the trade prices.

### ***Closing a Purchase Order***

Ticking the *Order Closed* box will mark the order as closed. I.e. all items have been received.

## **Stock Control**

Job Tracker Professional includes a simplified stock control system. The system is not designed to track stock levels; however it does show the qty. It has been designed to enable you to pick commonly used items from a database rather than having to type them in each time you need them.

The Stock Control screen is accessed by clicking on Stock Control from the main from screen.

# Job Tracker Professional User Manual

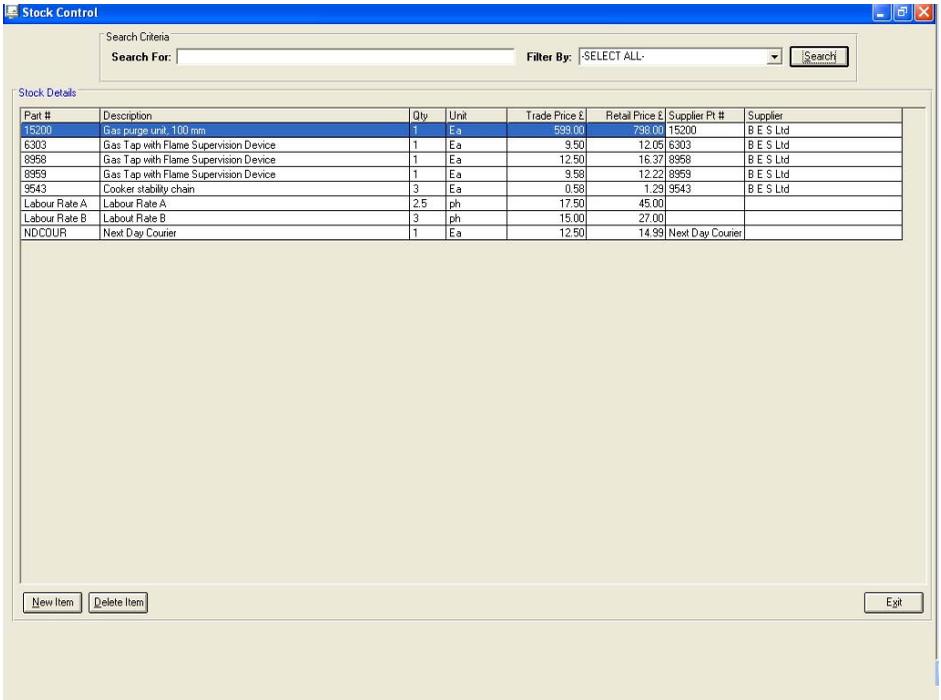


Figure 17

Upon entering the screen it will look fairly empty.

If you only have a handful of stock you can simply leave everything blank and click on the Search button.

*(This is not really recommended if you have a few thousand item in the database as it can take a few seconds to come back)*

## **Searching for Specific Stock Items**

Enter the search criteria in the **Search For** box. You can search by Supplier Part Number, Internal Part Number or Description. You can

## **Job Tracker Professional User Manual**

put as much or as little information in the search box as you can get away with.

e.g. To search for 'Gas Tap with Flame Supervision Device' you could simply enter 'Gas' and the system will show you all similar items.

### ***Searching for Items by a specific Supplier***

Clicking on the ***Filter By*** pick list will show you all the suppliers that are currently in the system, see page 29 for more information on creating new suppliers.

Once you have selected a supplier, you can enter your search criteria in the ***Search For*** box and press the ***Search*** button. Only items by the selected supplier will be displayed.

### ***Editing Stock Items***

First find the item you want to change using the search methods described above. Then simply double click on the item in the list. A new screen will appear enabling you to make the necessary changes.

# Job Tracker Professional User Manual

The screenshot shows the 'Stock Control' window. At the top, there is a search bar with 'Search For' and a 'Filter By' dropdown set to 'SELECT ALL'. Below this is a table of stock items:

Part #	Description	Qty	Unit	Trade Price £	Retail Price £	Supplier Part #	Supplier
15000	Gas purge unit, 100 mm	1	Ea	599.00	799.00	15200	B E S Ltd
8303	Gas Tap with Flame Supervision Device	1	Ea	9.50	12.00	8303	B E S Ltd
8998		1	Ea	4.50	5.00		B E S Ltd
8999							
9000							

The 'Item Details' section for the selected item (Labour Rate A) is shown below:

**Supplier:** [Pick]

**Suppliers Part #:** [ ]

**Part #:** Labour Rate A

**Description:** Labour Rate A

**Details:** Fully qualified engineer during normal working hours

**Supply Unit:** j/h

**Qty:** 2.5

**Trade Unit Price £:** 17.50

**Retail Unit Price £:** 45.00

**VAI Rate:** Standard Rate 17.5%

**Image:** [Pick Image]

Buttons at the bottom include 'Save Item', 'Cancel', and 'Exit'.

Figure 18

**Supplier:** If applicable you can pick an existing supplier and assign it to this stock item. For service items such as Labour etc. You do not need to assign a supplier. However you could always set your own company up as a supplier and assign the Labour costs to that.

**Suppliers Part #:** This is an optional field and does not have to be entered, you can of course do so if you wish.

**Part #:** This is the internal part number, if applicable. i.e. The part number used by your company to identify this product.

## **Job Tracker Professional User Manual**

**Description:** This is a short description of the item, Max 250 characters, and is what will be displayed in the Jobs, estimates and Purchase Orders screens and documents.

**Details:** Again an optional field and can be used to give a full description of the item.

**Supply Unit:** This is the unit the item is supplied in. i.e. Each, PH, Ltrs etc. You can put anything in here that will identify the unit.

**Qty:** The number of items currently in stock.

**Trade Unit Price:** The price you pay for the item

**Retail Unit Price:** The price you sell the item for.

**VAT Rate:** You can pick the VAT rate from the pick list. The VAT rates are set in Control Panel / Counters & Data. See page 45

**Image:** You can assign an image to a stock item if you wish; the system currently handles jpg formats only. Click the ***Pick Image*** button and navigate your hard drive / network to locate the image.

When you happy with your changes simply click the ***Save Item*** button.

The buttons at the bottom of the screen will automatically change once you start editing a stock item.

# Job Tracker Professional User Manual

## ***Creating a new stock item***

In this example you will be shown how to add a new Labour Rate to the system. As mentioned earlier Labour and other service items are handled exactly as normal stock items.

## ***Adding a new Labour Rate***

Enter the Stock Control screen by clicking Stock Control from the main front screen.

Click on the ***New Item*** button on the bottom left of the screen.

If you wish to assign a supplier click the ***Pick*** button and select your supplier. *Remember you could always assign your own company as the supplier of the Labour Rates.*

In the ***Suppliers Part #*** type **Labour Rate C** (or whatever you wish to call it)

In the ***Part #*** field enter type **Labour Rate C** (or whatever you wish to call it)

In the ***Description*** field type **Labour Rate C** (or whatever you wish to call it)

In the ***Details*** field type **Fully qualified engineer during normal working hours** (or something more meaningful to you)

In the ***Supply Unit*** field type **PH** (*per hour* or something more applicable)

In the ***QTY*** field type **1**

In the ***Trade Unit Price*** field type **17.00** (The hourly rate you pay)

In the ***Retail Unit Price*** field type **45.00** (The hourly rate you charge)

In the ***VAT Rate*** select the rate applicable to your invoices.

In the ***Image*** field leave it blank. (You can assign an image if you wish)

Click the ***Save Item*** button.

## **Job Tracker Professional User Manual**

The new item will now be available to the entire system, including any networked computers.

### ***Deleting Stock Items***

Using the search method described earlier find the item you wish to delete. Then click the ***Delete Item*** button. You will be prompted to confirm you wish to delete the item.

Click the ***Yes / No*** buttons as applicable.

### **Control Panel**

The control panel is where a fair amount of the configuration of the system takes place.

The control panel is accessed from the main front screen by clicking on ***Control Panel***.

# Job Tracker Professional User Manual

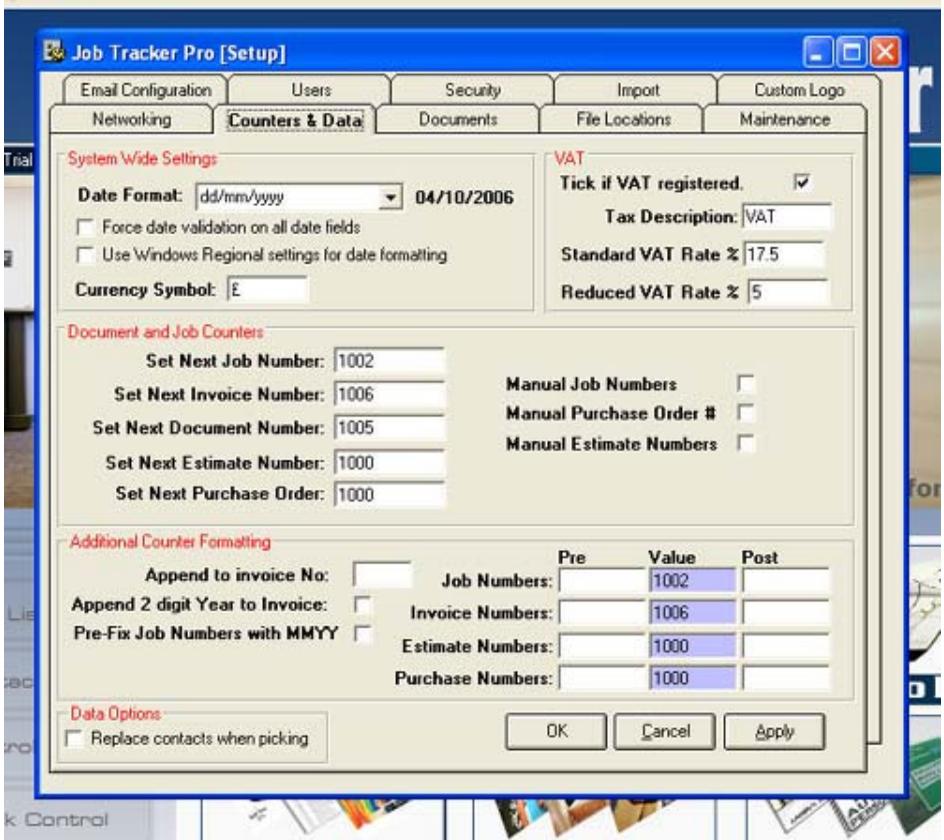


Figure 19

The control panel has 10 tabs, at present, each used for a specific purpose.

When you first enter the Control Panel you will, by default, be taken to the *Counters & Data* tab.

# **Job Tracker Professional User Manual**

## ***System Wide Settings***

### **Changing Date Formats**

Job Tracker Pro is internationalised, meaning the variable information such as date formats, currency symbols, VAT descriptions are all configurable.

**Date Format:** To change the date format simply use the drop down box to pick an applicable date format. A sample of the format will be displayed beside the selection.

**Force date validation on all date fields.** This option is now obsolete and is included for backward compatibility only. Job Tracker Professional will now automatically force compliance on all date fields.

**Use Windows Regional settings for date formatting:** You can use this feature to bypass any date formatting set by users and the system will request the date format from Windows™ itself. Although this feature works many users incorrectly specify the regional settings on their PCs which in turn can cause unwanted date formatting issues.

**Currency Symbol:** This is the symbol used to denote the currency in use through out all financial data. E.g. \$, £, Kr, etc. Note this is not exchange rate based; it is simply a visual character.

# Job Tracker Professional User Manual

## VAT Rates and Description (Local Taxes)

**Tick if VAT registered:** This option is now obsolete and is included for backward compatibility only.

**Tax Description:** This is the description used to identify the tax part of any financial data. E.g. UK = VAT, Australia = GST etc..

**Standard VAT Rate %**

**Reduced VAT Rate %**

The applicable VAT Rates.

## *Document and Job Numbers (Counters)*

Here you can set the next numeric part of the numbers used to identify Jobs, Estimates, Purchase Orders and Invoices.

**Warning:** It is important that you **DO NOT** change the counters to any previously used value as you can end up overwriting existing data.

## Manual Job Numbers

Ticking the appropriate box switches the system into manual numbering mode. You will be prompted for the number after pressing Save in Jobs, Estimates, and Purchase Orders.

# Job Tracker Professional User Manual

## Counter and Number Formatting

**Append to invoice No**

**Append 2 digit Year to Invoice**

**Pre-Fix Job Numbers with MMY**

These fields are now obsolete and are included for backward compatibility only.

## Pre, and Post Number Formatting

Job, Invoice, Estimate and Purchase order numbers can now be Pre and Post formatted using the Pre and Post fields as applicable.

The Pre and Post fields can contain any combination of text and characters you wish.

You can also format using a number of fields.

DD = numeric 2 digit day

MM = numeric 2 digit month

YY = numeric 2 digit year

Y = numeric right most digit of year.

Example

<b>Pre</b>	<b>Value</b>	<b>Post</b>
<b>AMM/4</b>	<b>1008</b>	<b>-Y</b>

Assuming the date was 27 June 2006 would create the following number. **A06/41008-6**

# Job Tracker Professional User Manual

**Replace contracts when picking:** Tick this box if you wish to replace any previous selected contacts in the Jobs / Client Details Contacts box when you pick an existing contact using the Pick button.

If this box is not ticked selected contacts will be appended to the contents of the contacts box.

## ***Networking***

Job Tracker Professional is fully network aware and can handle up to 200 connected computers.

## **Connecting a client to a server**

The term server / client does not exist in Job Tracker, however the server is generally termed the PC, in a network environment, which is holding the main Job Tracker Pro database and associated files.

When Job Tracker Pro is first installed it also includes all it needs to run as a stand alone application. It is up to you to decide which installation of Job Tracker Pro will act as the server. Generally speaking the fastest , largest and most reliable computer you have.

Once you decide which computer will act as the Job Tracker Pro server you simply need to point the other computers to it,

1) On the server computer, use Windows Explorer™ to find the Job Tracker Pro folder. This is normally located on the root of your main hard drive and is labelled **Job Tracker Pro**. Check the ***File Locations*** tab in the Control Panel for the exact location. See page 49

## Job Tracker Professional User Manual

2) You need to share the Job Tracker Pro folder across your network. Using Windows Explorer <sup>TM</sup>; locate the folder, right click on the folder and click *Sharing and Security*

Tick the Box **Share this folder on the network** and type in a share name for the folder or just accept the default suggested by Windows <sup>TM</sup>.

Tick the box, **Allow network users to change my files** and click OK.

**Please Note:** This procedure may differ from machine to machine, please ask you network administrator for assistance if need be. S B Systems are also able to give you telephone support to assist you in networking your PCs.

3) Go to the other computers you want to connect to Job Tracker and in the **Networking** tab click the locate button.

4) Navigate your network using the standard Windows <sup>TM</sup> network browser (My Network Places) and you will see a folder called 'Job Tracker Pro' or whatever other name you give it in step 2

5) Click in the 'Job Tracker Pro' folder, you will see a file called **jobtrackerpro.sbs**. Select it and click OK, then in Job Tracker click the *Apply* button followed by OK.

6) Restart Job Tracker. You will now be sharing the Job Tracker database on your server.

Please note: A valid Job Tracker Professional licence is required for each installation of Job Tracker. The system will refuse you access if an unlicensed copy is detected.

# **Job Tracker Professional User Manual**

## **Using Job Tracker on a File Server**

This process is fairly technical and should only be carried out by your network administrator.

Using the **File Locations** tab, have a look and see where the database is stored.

Using Windows Explorer™ copy or move the entire **Job Tracker Pro** folder and all of its contents to your file server.

Share the folder on your file server and give full write permission to all connecting Job Tracker Pro clients.

Follow the instructions on page 47 for pointing a client to a server.

## ***File Locations***

The file locations tab is used to identify where the Job Tracker database and other related documents are stored.

You cannot change anything on this tab; it is just a visual indication.

To make changes to the location of the database please refer to Using Job Tracker on a File Server above

# **Job Tracker Professional User Manual**

## ***Email Configuration***

Job Tracker Pro can send emails right from within the application rather than going through an external program such as Outlook™ or Outlook Express™.

Before you are able to send emails you need to do a little configuration. Your system administrator will be able to help you here.

In Control Panel click on the **Email Configuration** tab

# Job Tracker Professional User Manual

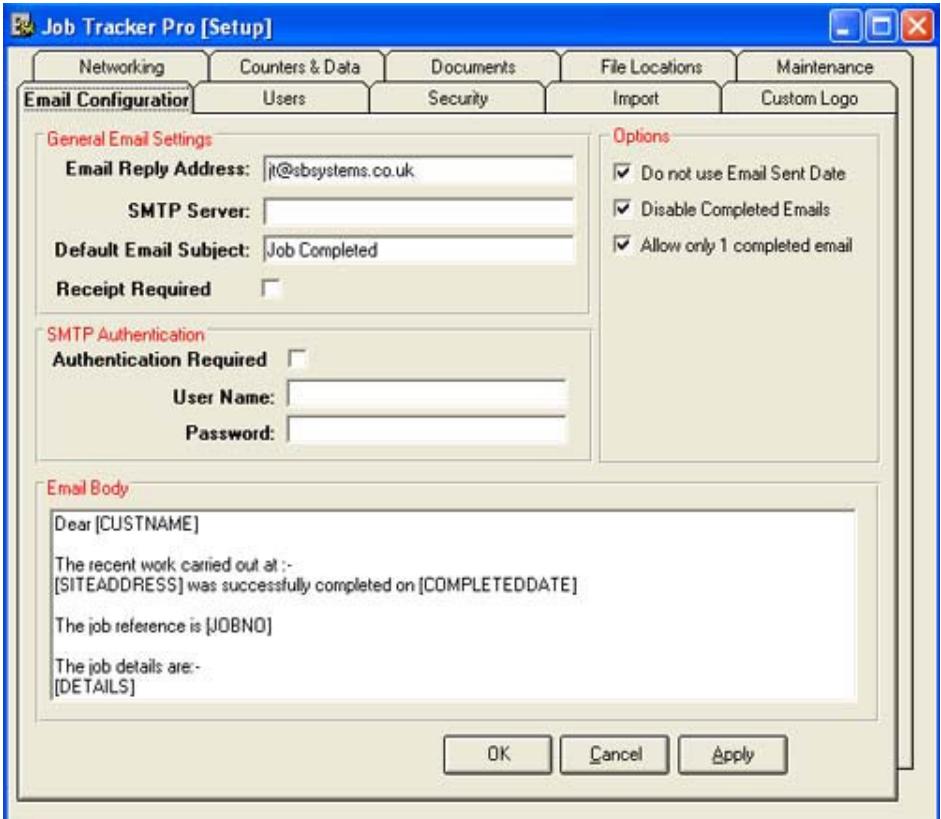


Figure 20

## General Email Settings

**Email Reply Address:** This is the reply address that will go out with any emails sent from within Job Tracker.

**SMTP Server:** This is provided by your Internet Service Provider, i.e. the company you purchase your internet access from e.g. BT, Orange, NTL etc. You can get this information from Outlook or

## **Job Tracker Professional User Manual**

Outlook Express by going into Accounts / Properties and the Servers tab.

**Default Email Subject:** This is the email subject that will be used when sending an automated email. When sending manual emails you will be able to specify this at the time of sending.

**Receipt Required:** Tick this box if you require a read receipt for the emails you send. They will be sent back to the reply address specified earlier.

**SMTP Authentication:** Most Internet Service Providers insist you log onto their SMTP server before you can send emails. This is a means of helping prevent SPAM.

The username and password here will be provided by your Internet Service Provider.

### **Options**

**Do not use send email date:** In the jobs screen there is a pre-labelled box called Email Sent Date. When you send a Job Completed email the system will automatically put the date in this field. If you do not want this feature un-tick this box.

**Disable Completed Emails:** If you do not want to use the Send Completed Email feature un-tick this box.

**Allow only 1 completed email:** Ticking this box ensures you only send one completed email per job. This feature helps in preventing you unintentionally sending multiple emails.

# Job Tracker Professional User Manual

## Configuring the Automatic Completed Email



Figure 21

### Email Body

An Automatic Completed Email can be sent at the press of a button. In the Job Screen there is a ***Job Complete*** button, third from the left in Figure 21 above.

Clicking this will automatically send an email to the address specified in the Customer email field. The contents of the email can be configured as follows:

There are a number of field names which can be inserted into the email:

### Field Names

[CUSTNAME]	The customer's name
[SITEADDRESS]	The site address
[COMPLETEDATE]	The date the job was completed
[DETAILS]	The details of the job
[TOTALCOST]	Total amount payable.
[TECHNAME]	The names of the engineer(s).
[JOBNO]	The job number.

When the system sends an automated email it replaces the field names with the appropriate information taken from the Jobs Screen.

## **Job Tracker Professional User Manual**

Simply type your email into the Email Body box and insert the appropriate field name as required.

E.g.

**Dear [CUSTNAME]**

**The recent work carried out at :-  
[SITEADDRESS] was successfully completed on  
[COMPLETEDDATE]**

**The job reference is [JOBNO]**

**The job details are:-  
[DETAILS]**

**The engineer's who worked on the job were:- [TECHNAME]**

**The total cost of the job was £ [TOTALCOST]**

Once you're happy with the details click the ***Apply*** button to save your changes.

# Job Tracker Professional User Manual

## Documents & Templates

### Job Sheets, Estimates, Invoices and Purchase Orders

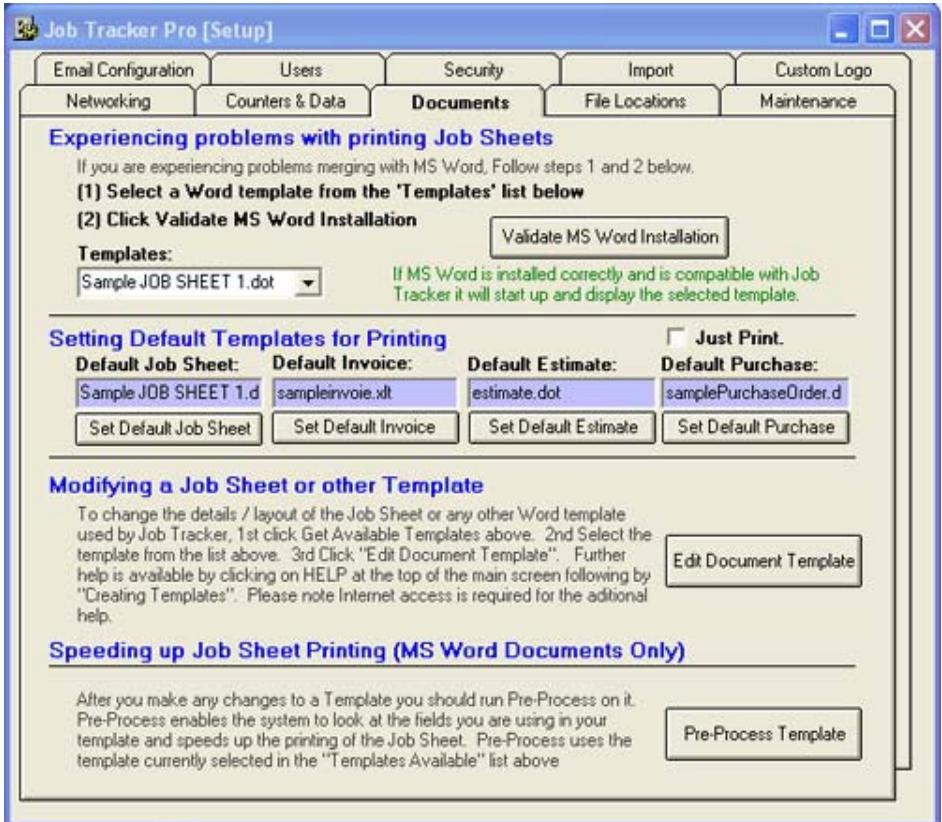


Figure 22

## Adding a new Template

To add a new template to Job Tracker, simply create the template using MS Word™ or MS Excel™ and place it in Templates folders.

# Job Tracker Professional User Manual

You can locate the templates folder by looking in the **File Locations** tab.

Job Tracker Professional integrates with MS Word <sup>TM</sup> and MS Excel <sup>TM</sup>

The reason for this is the majority of companies have at least one of the packages and in doing so enables you, the end user, to be in complete control of the look and feel of all the documents produced by the system.

Job Tracker Pro ships with 5 sample templates, 2 Job Sheets, an Invoice, an Estimate and a Purchase Order. You can of course totally redesign the templates to look exactly how you want them to.

## Assigning Templates

- 1) Select the template you want to assign using the pull down list labelled **Templates**
- 2) Click the **Set Default** button appropriate to what you want to set. i.e. Job Sheet, Invoice, Estimate or Purchase
- 3) Click the **Pre-Process template** button near the bottom of the screen. Your computer may appear to do nothing for a little while, depending on the speed of your PC. But a message will come back saying the pre-processing is complete.

Pre-Processing is only required for MS Word <sup>TM</sup> documents. i.e. you do not need to pre-process Excel <sup>TM</sup> Templates.

## Editing Templates

Select the template you wish to edit by picking it from the *Templates* drop down list.

# Job Tracker Professional User Manual

Click the *Edit Document Template* button. The appropriate package, MS Word™ or MS Excel™ will start up in a special mode which allows you to edit templates.

The screenshot displays the 'JOB SHEET' form within the Sherwin Business Systems Ltd. application. The form is divided into several sections:

- Header:** Sherwin Business Systems Ltd, 63 Hampstead Avenue, Clacton On Sea, Essex, CO16 7HE, Tel. 01255 435314.
- Logo:** S:Systems »
- Job Sheet Title:** JOB SHEET [JOBNO]
- Job Status Section:**

JOB STATUS: [JOBSTATUS]	
DUE DATE: [JOBDATE3]	SALES REP: [JOBPICK1]
CUST REF: [JOBDETAILS0]	BOOKED BY: [JOBPICK2]
ORDER NO: [JOBDETAILS2]	POLICY NO: [CLIENTFIELD1]
ENGINEERS: [HENGINEERS]	
- Customer Details Section:**

**CUSTOMER DETAILS**

TELEPHONE NO: [CUSTOCONTACT3]

NAME: [CUSTOCONTACT0]

ADDRESS: [CUSTOCONTACT1]
- Job Details Section:**

**JOB DETAILS:** [JOB BRIEF]

Figure 23

All fields visible in Job Tracker can be automatically inserted into a document template.

The Job Tracker fields are labelled between square brackets and are ALWAYS UPPERCASE. E.g. [JOBNO]

All you need to do is map the fields from the appropriate Job Tracker Professional screen to the Template.

All normal MS Word™ and Excel™ formatting can still be used as normal. The only thing you need to remember is the Job Tracker field

# Job Tracker Professional User Manual

must not be touching any other characters or words. i.e. there must be a space before and after the Job Tracker Pro field name.

## Job Tracker Template Field Names

Some fields can be used with a H in them, this denotes to display the information Horizontally rather than vertically.

E.g. [HENGINEERS] would display a list of the engineers as follows,  
**Engineer1, Engineer2**  
 [ENGINEERS] would display the list as follows:  
**Engineer1**  
**Engineer2**

## Jobs, Customer Details Fields

The screenshot displays the Job Tracker Professional software interface. At the top, there is a toolbar with icons for Save, Cancel, Job Complete, Search Jobs, Print Job Sheet, Print Invoice, Show Estimate, and New Purchase. To the right, the Job Status is set to [JOBSTATUS] with an Update button, and the Job No. is [JOBNO].

The main interface is divided into several sections:

- Job Details:** Includes fields for Name ([CUSTCONTACT0]), Site Address ([CUSTCONTACT1] or [HCUSTCONTACT1]), Site Contacts ([CUSTCONTACT2]), Telephone ([CUSTCONTACT3]), Mobile ([CUSTCONTACT4]), Fax ([CUSTCONTACT5]), Email ([CUSTCONTACT6]), and Website ([CUSTCONTACT7]).
- Client Details:** Includes fields for Internal Ref ([JOBDETAILS2]), SBS Ref ([JOBDETAILS4]), Shipping Ref ([JOBDETAILS8]), Purchase Ref ([JOBDETAILS8]), and Job Notes ([JOBDETAILS10]).
- Documents & Emails:** Includes fields for Marketing Source ([JOBPICK0]), Sales Rep ([JOBPICK1]), Job Booked By ([JOBPICK2]), and Job Category ([JOBPICK3]).
- Engineers assigned to the job:** A list showing [ENGINEERS] or [HENGINEERS] with Assign and Remove buttons.
- Special skills required for job:** A list showing [SKILLS] or [HSKILLS] with Assign and Remove buttons.
- Job Details and Requirements:** Includes a [JOBDETAILS] field and a table for Parts and costs for Job.
- Parts and costs for Job:** A table with columns for Qty, Part #, Description, U Price, and Total. It shows [PARTTY], [PARTNO], [PARTDESC], [PARTUP] = Retail Price, and [PARTTP] = Trade Price.
- Summary:** Includes fields for [SUBTOTAL], [VAT], and [GRANDTOTAL].
- Job Associated Dates:** Includes fields for Created ([JOBDATE0]), Quote Sent ([JOBDATE1]), Order Received ([JOBDATE2]), Due ([JOBDATE3]), Completed Email Sent ([JOBDATE4]), Completed ([JOBDATE5]), Invoiced ([JOBDATE6]), and Invoice Paid ([JOBDATE8]).
- Annual Recall:** Includes a field for [JOBDATE7].
- Recall Reason:** Includes a field for [RECALLREASON].

At the bottom, there is a status bar with the text: "The assigned engineers do not have the following required qualifications / skills." and "Est No: 12345".

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Figure 24

for larger images click on Help, Creating Templates.

## Job, Client Fields

The screenshot displays the 'Job Control Panel' at the top, featuring a toolbar with icons for Save, Cancel, Job Complete, Search Jobs, Print Job Sheet, Print Invoice, Show Estimate, and New Purchase. To the right, it shows 'Job Status: [JOBSTATUS]' with an 'Update' button and 'Job No: [JOBNO]'. Below the toolbar are tabs for 'Job Details', 'Client Details', 'Documents & Emails', 'Call Tracking', and 'Purchase Orders'. The 'Client Details' tab is active, showing a form with the following fields:

Client Details		Client Job Details		
Comp. Name:	[CLIENTCONTACT0] <input type="button" value="Pick"/>	Client Ref	Unused	Received
Comp. Address:	[CLIENTCONTACT1]	[CLIENTFIELDS0]	[CLIENTFIELDS6]	[CLIENTDATE0] <input type="button" value="Pick"/>
Contacts:	[CLIENTCONTACT2] <input type="button" value="Pick"/>	Booking No	Unused	Accepted
Telephone:	[CLIENTCONTACT3]	[CLIENTFIELDS1]	[CLIENTFIELDS7]	[CLIENTDATE1] <input type="button" value="Pick"/>
Mobile:	[CLIENTCONTACT4]	Passed By	Unused	Call Back
Fax:	[CLIENTCONTACT5]	[CLIENTFIELDS2]	[CLIENTFIELDS8]	[CLIENTDATE2] <input type="button" value="Pick"/>
Email:	[CLIENTCONTACT6] <input type="button" value="Pick"/>	Unused	Unused	Unused
Website:	[CLIENTCONTACT7] <input type="button" value="Pick"/>	[CLIENTFIELDS3]	[CLIENTFIELDS9]	[CLIENTDATE3] <input type="button" value="Pick"/>
		Unused	Unused	Unused
		[CLIENTFIELDS4]	[CLIENTFIELDS10]	[CLIENTDATE4] <input type="button" value="Pick"/>
		Unused	Unused	Unused
		[CLIENTFIELDS5]	[CLIENTFIELDS11]	[CLIENTDATE5] <input type="button" value="Pick"/>

Client notes for this job:  
Notes: (press F2 to insert the date and time)

[CLIENTNOTES]

Figure 25

## Estimate Template Field Names

The estimate templates use exactly the same field names as the Jobs Template.

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## Purchase Order Fields

Purchase Order Control Panel

Save Cancel Send Email Search Orders Print Order

Purchase Order Status  
 [PONUMBER] Update  
 Purchase Order No  
 [POSTATUS]  Order Closed Evt

Supplier Details

Company Name: [SUPPCONTACT0] Pick  
 Address: [SUPPCONTACT1] or [SUPPADRESS]  
 Contacts: [SUPPCONTACT2]  
 Telephone: [SUPPCONTACT3]  
 Mobile: [SUPPCONTACT4]  
 Fax: [SUPPCONTACT5]  
 Email: [SUPPCONTACT6] [Go]  
 Website: [SUPPCONTACT7]  
 Account No: [SUPPCONTACT8]

Purchase Order Details

Supplier Ref: [PODETAILS0] Unused: [PODETAILS4]  
 Order Date: [PODATEORD] Unused: [PODETAILS5]  
 Due Date: [PODATEDUE] Unused: [PODETAILS6]  
 Date Received: [PODETAILS7] Unused: [PODETAILS7]  
 Order Taken By: [PODETAILS1] Unused: [PODETAILS8]  
 Courier: [PODETAILS2] Unused: [PODETAILS9]  
 Tracking Ref: [PODETAILS3] Unused: [PODETAILS9]

Notes

[PODETAILS10]

Items

Supplier Pt No	Internal Part No	Description	Qty	Unit	Trade UP £	Retail UP £	Job #	VAT%
[PARTNOSUP] = SUPPLIER PART NUMBER	[PARTNOINT] = INTERNAL PART NUMBER	[PARTDESC] = DESCRIPTION	[PARTQTY] = QTY	[PARTUNIT] = UNIT OF SUPPLY	[PARTTP] = TRADE UNIT PRICE	[PARTRUP] RETAIL UNIT PRICE	[PARTVRATE] VAT RATE ON ITEM	[USERNAME] = Prints the users name.

Assign all Items to Job Number: [ ] Pick

Add Item Remove Item

[PONET] Net Cost £ 0.00  
 [POVAT] VAT £ 0.00  
 [POGRAND] Gross Cost £ 0.00

## Invoice Template Field Names

Invoice templates support all the Jobs field names as well as the following additional fields.

[SITEADDRESS]	The site address
[CLIENTADDRESS]	The clients address
[INVNO]	The invoice number
[PARTUNIT]	The unit of supply

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## Importing Stock

Job Tracker can import stock based CSV files.

Click on the **Import** tab in the Control Panel.

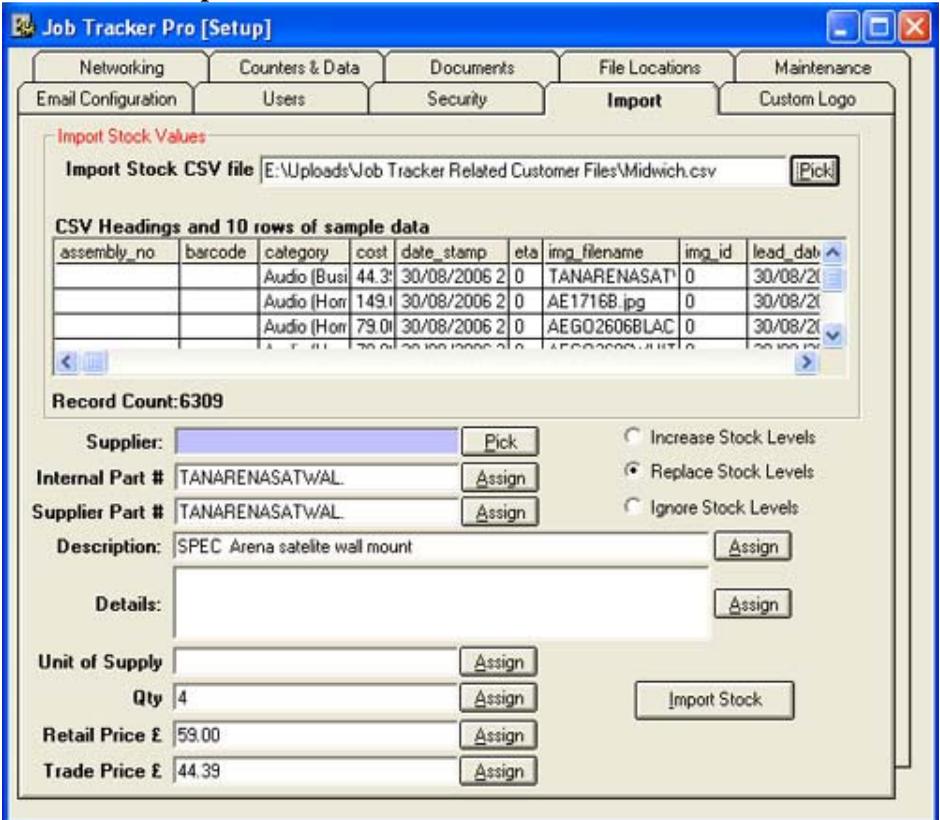


Figure 26

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To locate the CSV file click the **Pick** button and use the standard Windows Explorer™ browser to locate the file.

Once the file is located, Job Tracker Professional will display approximately the 1<sup>st</sup> 10 rows of data it finds in the file and shows you a count of exactly how many records there are to import.

We now need to tell Job Tracker which part of the data represents which part of Job Trackers stock definition. This is done in two steps.

- (1) We do this by clicking on a column in the list, e.g. Supplier Part Number.
- (2) Click the assign button relating to the Job Tracker field.

Repeat steps 1 and 2 for each field you want to import.

You can select a Supplier using the Pick button if you wish.

The only required field is the internal part number.

You can also tell Job Tracker what to do with the stock levels by clicking the appropriate option.

You can manually enter appropriate data into the fields as necessary. E.g. if the CSV file does not include the Unit of Supply you can manually type in 'Ea' or whichever is applicable.

Job Tracker will import the data intelligently. This means it will not create duplicates.

Once you click the **Import Stock** button the import process will start. This can take some time depending on the size of the file, however a progress bar will be displayed.

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Job Tracker will also save the assigned fields for future use. The assigned fields will be stored against the CSV filename.

To make use of these saved settings make sure updated CSV files, from the same supplier, have the same filename.

## ***Maintenance***

The maintenance tab gives you access to a number of features that should be used with **caution**.

**Show Un-Named Labels:** This button is now obsolete and is only for backward compatibility.

**Reset System Admin Settings:** This button will reset the System Administrator user settings back to the factory values.

**Reset Database:** This button will **ERASE, DELETE, and REMOVE** all your data and produce an empty database.

**Copy Database:** This button will create a copy of you database and place it in the Backup folder. Note: This will only be 100% successful if no other clients are currently logged in to Job Tracker.

You can still copy the database with others logged in but the copied data could possibly be out of date at the time of pressing the button.

## **Features Under Development**

Any options in this frame are currently under development. From time to time we are asked by customers if they could test / use the latest feature. We put this option here in such cases. You are advised

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not to enable these features without first talking to S B Systems as a loss of data could result.

## **Network Requirements**

### **Keeping your database healthy**

Job Tracker is available in a number of installations.

The downloaded trial version ships with MS Jet 4 as the database manager. Other versions available include MSDE and MS SQL Server.

MS Jet is theoretically capable of up to 200 simultaneously connections from networked computers. In reality it's very unlikely to maintain a healthy database with this many connections. Practically Job Tracker will run in a useable manner with up to 30 connections.

Although MS Jet is a multi user database manager it does not handle network failures well. There are a few things you can do to ensure your Job Tracker database remains healthy and un-corrupted.

- 1) The majority of network cards which are embedded in PCs. i.e. built into the motherboard are, generally speaking, not very stable. Under normal circumstances you will most likely not notice this. However if you start to use Job Tracker on a number of networked PCs with inferior network cards or use a cheap switch or hub, it can take only one corrupted packet of data to damage your database.

Under some circumstances corrupted database cannot be

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recovered and this means a loss of your data. In short if you are going to be using Job Tracker on a network with a number of clients, it would be worth while ensuring you have decent quality hardware supporting your network. A decent dedicated network card should only cost around £30 – £40, which is nothing compared to the potential financial loss from a corrupted database

- 2) Ensure all your networked users log off Job Tracker overnight so as the system is able to backup the database and do any automated repairs.
- 3) Ensure you users log off Job Tracker and their PCs correctly. i.e. DO NOT simply switch the computer off, particularly if they are logged into Job Tracker.
- 4) Do a database copy occasionally just to be on the safe side. See page 63 for details of how to copy your database.
- 5) Include Job Tracker as part of your daily back up procedure. If you do not have a back up procedure please consider implementing one. A decent DVD writer only costs around £40.00

## Backing up Job Tracker

Job Tracker Pro stores all its database and associated files under a folder called **Job Tracker Pro**.

This is normally located off the root on your main hard drive. This can differ for multi drive systems. To find out where the **Job Tracker Pro** folder is, go to the **Control Panel** and click on the **File Locations** tab. **The main database is located in:-** shows the

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location.

To back up the entire Job Tracker Database and associates files simply include this folder and sub folders in your daily backup schedule.

## Licensing Your Software

You need a licence for each installation. i.e. For every PC you use Job Tracker on you need to purchase a licence.

When you purchase Job Tracker Professional from S B Systems you will receive a licence key.

To activate your software click on **Help** at the top of the screen, Click on **About** then click on the **Licence Key** button.

Copy and Paste, or type, in your licence key, Click OK and restart Job Tracker.

You only need to enter the licence key on one networked machine. All other connected PCs will automatically detect and use the licence key.

If you attempt connecting more PCs that what your licence allows, you will be denied access.

Licences can be purchased from [www.job-tracker.co.uk](http://www.job-tracker.co.uk) or directly from S B Systems by calling +44 (0) 1255 435314.

We have authorised resellers covering UK, Australia, New Zealand and the USA, please ask us for details.

## **Job Tracker Professional User Manual**

Your licence key is used to identify your company, please do not share the key illegally with others. If you have been sold a licence key which does not have your Company Name in it please contact S B Systems on +44 (0) 1255 435314

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