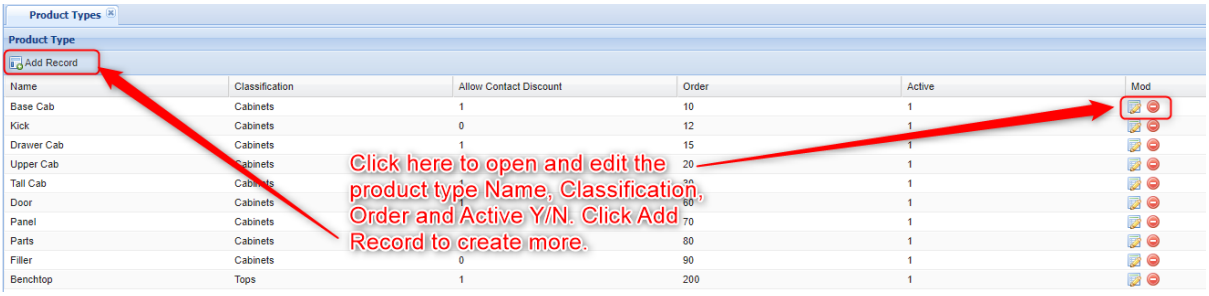
Process for building the products library in Jobman:

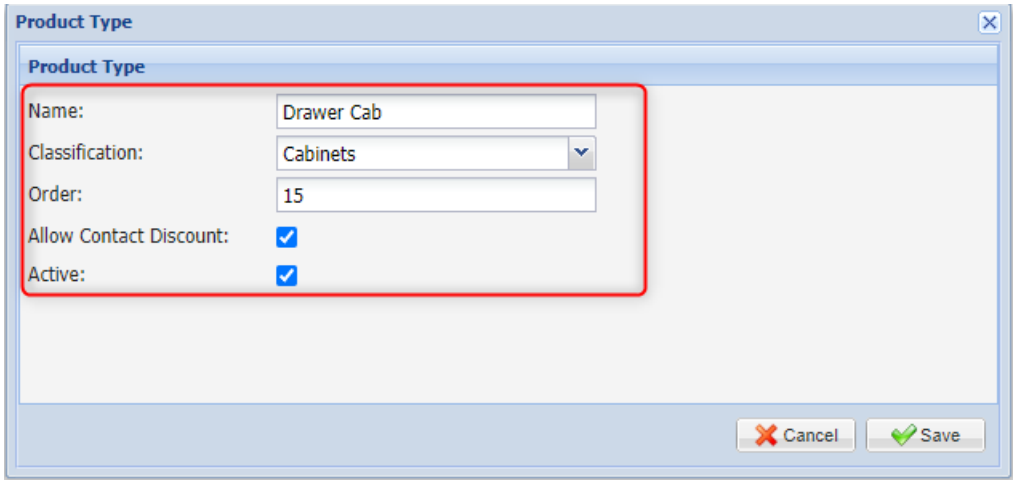
The object of setting up your products in Jobman is for the benefit of moving away from having to draw the room before providing your customer with the estimate of cost, which saves you time and overhead costs to your business. Therefore, setting up products in Jobman complete with assigned parts, and operation times (for major manufacturing processes), will provide you with this option to create a quote, add product pre-sets, select qty of products required, and select the required styles (material options) that will provide a breakdown of the material costs and labour separate, which become completely measurable once the lead turns into a job. Also, Jobman will provide users with the alternate option if you do prefer to draw the room first, you can export/import the product list/report from your CAD software into a quote. This will pull through the product qty, name, height, width, depth, simply leaving the assignment of styles (material selections) to be applied and the quote is finalized, again saving you time, and providing you with the markup % (profitability on top of all costs) you are making on the job. To set up products in Jobman is very simple, here are the steps to follow that will assist you further.

1. Define the different product categories, which will be known as "Product Types" and this will allow the required or most common product parts that make up these products to be auto-assigned. In Jobman these are called "Product Types" and allow us to automatically populate parts onto products of a certain product category. For example, Products allocated as a Base Cabinet will automatically have the following parts on the cabinet: Top, Side, Bottom, and Back. Understand that we are not building anything, yet we are just defining and planning what we will build in Jobman.

To edit/set up the product types, you will need to be under the Specifications tab/Product Types.



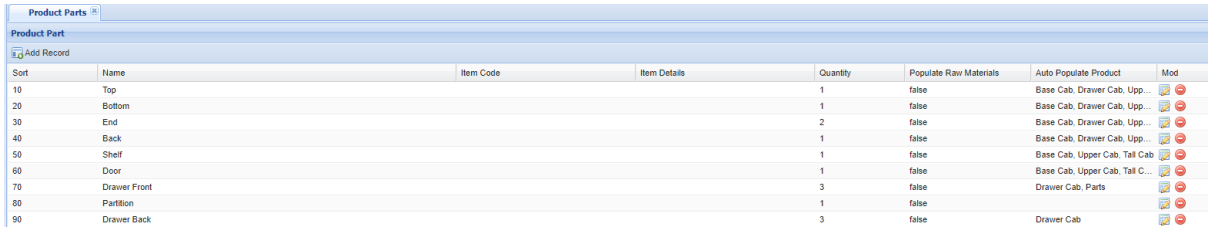
Editing an existing product type, click Edit record under Modify column to open the separate window, then you can edit the highlighted in red below. Note you can have the check box ticked or unticked for allowing or not allowing the product type to have a contact discount. If you have this tick, this can be added to a specific contact later as a product type discount for the contact.



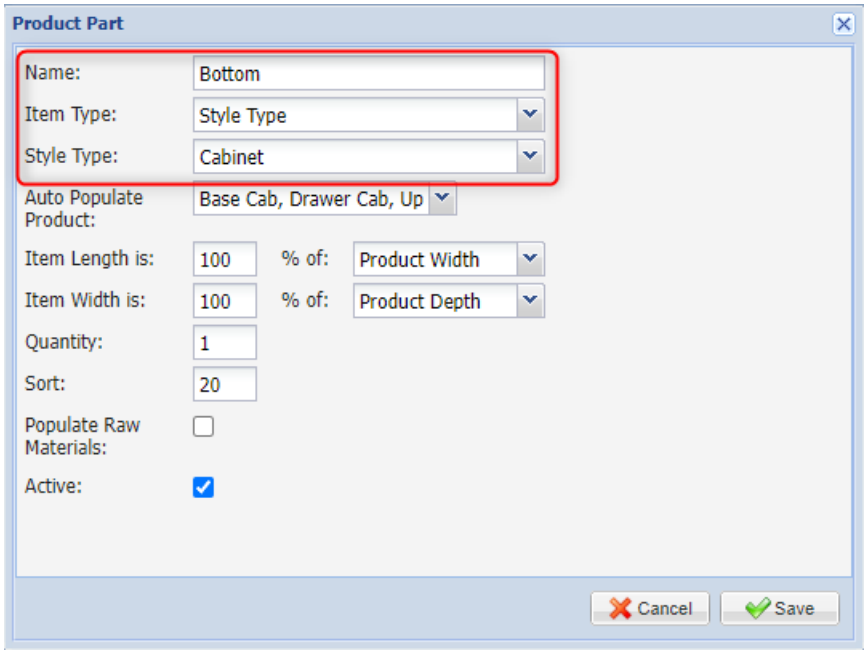
2. Go through and create all different "Product Types" (the current system setup will be sufficient). Note: Always a good idea to have Base, Tall, Wall Cabinets, and then cabinets with drawer parts should go under a Drawer Cabinets product type. This way you have all the specific drawer parts going into a separate category, rather than having to delete drawer parts out of most of the Base Cabinets for example.

3. Next we will create our parts in the "Products Parts" Section. We will not be creating every individual part (like you find in CAD software) only the parts that we deem useful and most common for quoting purposes. Also, we will group these required product parts under a style type. Individual parts can have individual styles, alternatively, a number of parts can be grouped under one style, like a top, bottom, ends, back, can all be grouped as Carcass style type. The style is the material schedule/allocation for those parts and what they are made from.

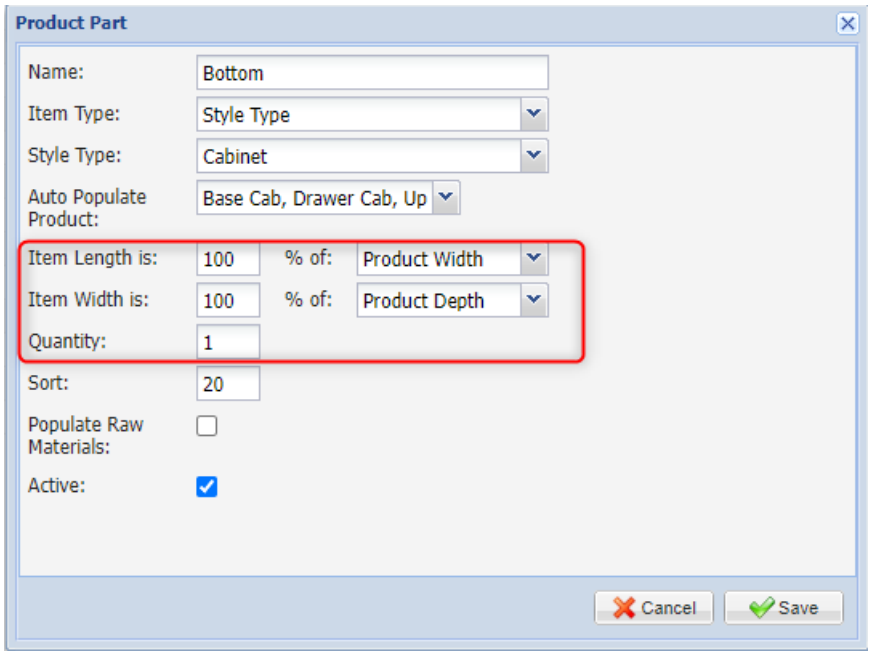
Editing/set up of product parts, under Specifications tab/Product Parts. A generic parts list will already exist in Jobman, so you can edit these to suit how you require these to be populated into products moving forward. The main purpose here is to set up your mainstream parts list used most in products for quote purposes, as shown below you have a part name, assigned qty, populate raw materials Y/N, and auto-populate product types. Note: For partition/division parts, you may only use these in specific products, in this case, best not to have these parts set to auto-populate product types and add them as a product part/item to the required product instead.



Editing product part, as shown below you can change the name, item type can be a Style Type or Availability Chart item, for most of the parts, this will be set as a Style Type, and select the Style Type that it requires to be assigned to. If the part requires to be customized with a specific type of lift up hinge for example that never changes on the product, you would be best to use the Availability Chart item as the item type, this allows you to assign the exact item that is to be ordered in from the supplier for the product.



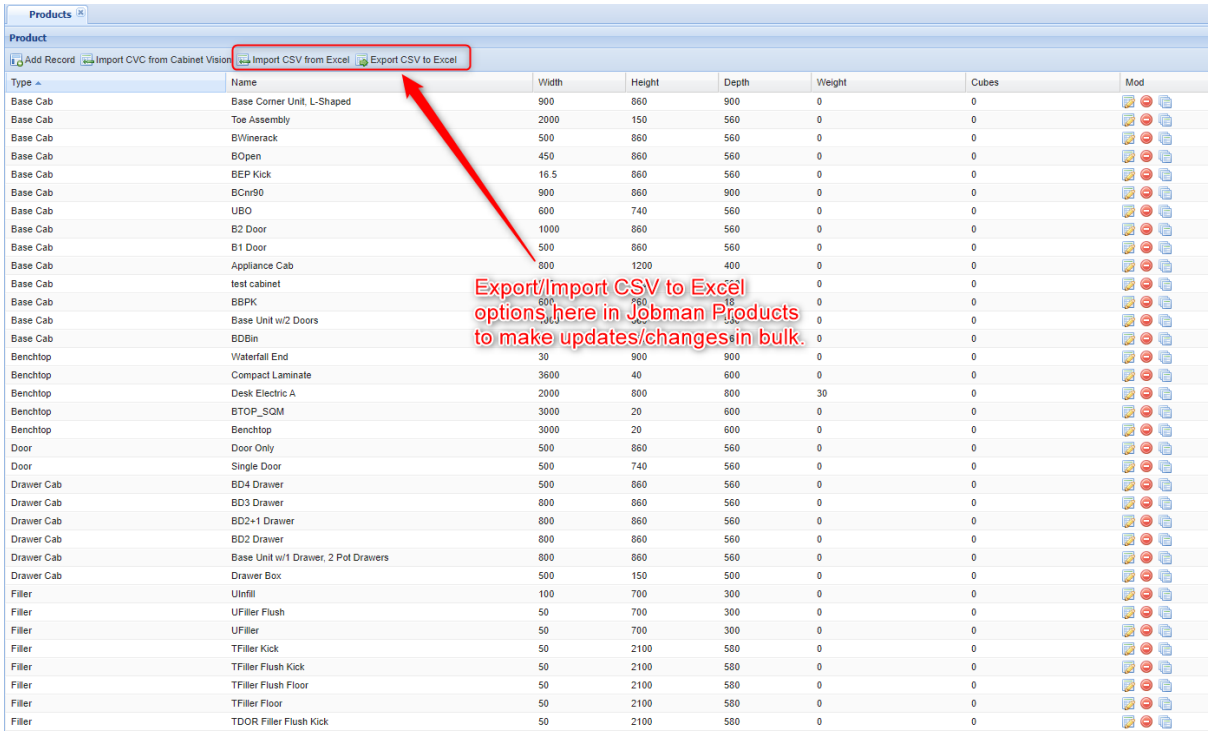
The next step is to set up the parametric measurements, this won't be applicable for all parts and stye types, only required for board materials, hardware parts won't require the parametric and will not show anyway, as the rate type of SQM is the only unit of measurement that the parametric will apply for.



Note: Populate Raw Materials, this feature should only be ticked on for hardware items, seeing these come from the accepted quote into the Job Raw Material which will provide the physical qty of the hinges, handles, and drawers that were on the selected products quoted.

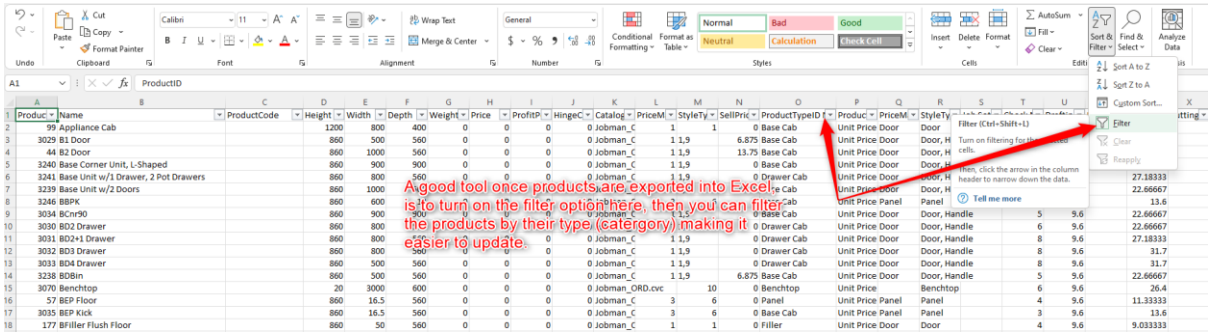
4. The most time-efficient way to set up your products in Jobman, in which you require to be the same naming convention as per your CAD software is to export the product list of the current cabinet names from Jobman into a CSV.File and then change the product name column to reflect the name that you have the products listed as in your CAD software. Once these

names have been changed/updated, you can also adjust the standard Height, Width, and Depth of the products (height is recommended to exclude the toe kick/assembly) and save the updated CSV.File. Then in Jobman, under products, you can perform a Product Import, and export the excel spreadsheet back in to update the product names. As parts were already assigned to the existing products, it's always recommended to do a sweep over the products, that way you can customize these further with the update or addition of parts that are required for each product.



Type	Name	Width	Height	Depth	Weight	Cubes	Mod
Base Cab	Base Corner Unit, L-Shaped	900	860	900	0	0	
Base Cab	Toe Assembly	2000	150	560	0	0	
Base Cab	BWinerack	500	860	560	0	0	
Base Cab	BOpen	450	860	560	0	0	
Base Cab	BEP Kick	16.5	860	560	0	0	
Base Cab	BCnr90	900	860	900	0	0	
Base Cab	UBO	600	740	560	0	0	
Base Cab	B2 Door	1000	860	560	0	0	
Base Cab	B1 Door	500	860	560	0	0	
Base Cab	Appliance Cab	800	1200	400	0	0	
Base Cab	test cabinet				0	0	
Base Cab	BBPK	600	860	18	0	0	
Base Cab	Base Unit w/2 Doors	1000	860	560	0	0	
Base Cab	BDBin	500	860	560	0	0	
Benchtop	Waterfall End	30	900	900	0	0	
Benchtop	Compact Laminate	3600	40	600	0	0	
Benchtop	Desk Electric A	2000	800	800	30	0	
Benchtop	BTOP_SQM	3000	20	600	0	0	
Benchtop	Benchtop	3000	20	600	0	0	
Door	Door Only	500	860	560	0	0	
Door	Single Door	500	740	560	0	0	
Drawer Cab	BD4 Drawer	500	860	560	0	0	
Drawer Cab	BD3 Drawer	800	860	560	0	0	
Drawer Cab	BD2+1 Drawer	800	860	560	0	0	
Drawer Cab	BD2 Drawer	800	860	560	0	0	
Drawer Cab	Base Unit w/1 Drawer, 2 Pot Drawers	800	860	560	0	0	
Drawer Cab	Drawer Box	500	150	500	0	0	
Filler	UInfill	100	700	300	0	0	
Filler	UFiller Flush	50	700	300	0	0	
Filler	UFiller	50	700	300	0	0	
Filler	TFiller Kick	50	2100	580	0	0	
Filler	TFiller Flush Kick	50	2100	580	0	0	
Filler	TFiller Flush Floor	50	2100	580	0	0	
Filler	TFiller Floor	50	2100	580	0	0	
Filler	TDOR Filler Flush Kick	50	2100	580	0	0	

Export of products into Excel: Recommend turning on the filter option as shown below, that way you can filter column O and filter by product type to make the changes.

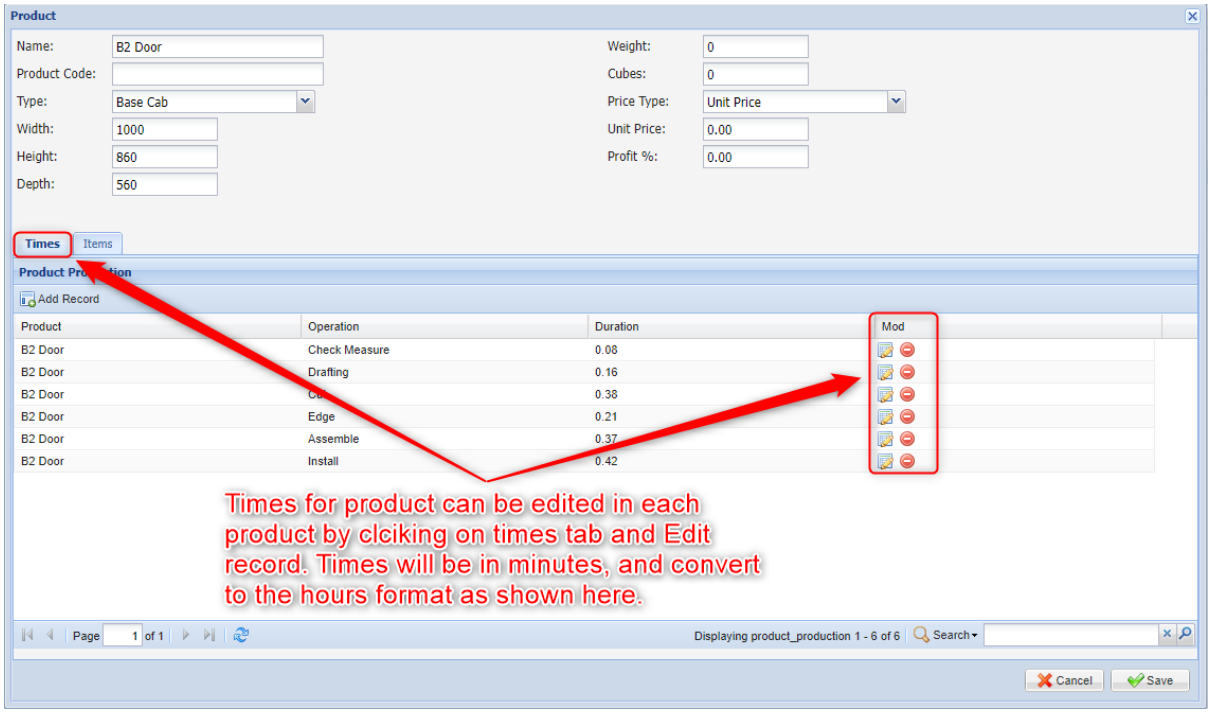


Produc	Name	ProductCode	Height	Width	Depth	Weight	Price	ProfitP	HingeC	Catalog	PriceM	StyleTy	SellPric	ProductTypeID	Produc	PriceM	StyleTy
99	Appliance Cab		1200	800	400	0	0	0	0	Jobman_C	1	1	0	Base Cab	Unit Price Door		Door
3029	B1 Door		860	500	560	0	0	0	0	Jobman_C	1	1,9	6.875	Base Cab	Unit Price Door		Door, H
44	B2 Door		860	1000	560	0	0	0	0	Jobman_C	1	1,9	13.75	Base Cab	Unit Price Door		Door, H
3240	Base Corner Unit, L-Shaped		860	900	900	0	0	0	0	Jobman_C	1	1,9	0	Base Cab	Unit Price Door		Door, H
3241	Base Unit w/1 Drawer, 2 Pot Drawers		860	800	560	0	0	0	0	Jobman_C	1	1,9	0	Drawer Cab	Unit Price Door		Door, H
3239	Base Unit w/2 Doors		860	1000	560	0	0	0	0	Jobman_C	1	1,9	0	Base Cab	Unit Price Door		Door, H
3246	BBPK		860	600	560	0	0	0	0	Jobman_C	1	1,9	0	Base Cab	Unit Price Panel		Panel
3034	BCnr90		860	900	560	0	0	0	0	Jobman_C	1	1,9	0	Base Cab	Unit Price Door		Door, Handle
3030	BD2 Drawer		860	800	560	0	0	0	0	Jobman_C	1	1,9	0	Drawer Cab	Unit Price Door		Door, Handle
3031	BD2+1 Drawer		860	800	560	0	0	0	0	Jobman_C	1	1,9	0	Drawer Cab	Unit Price Door		Door, Handle
3032	BD3 Drawer		860	800	560	0	0	0	0	Jobman_C	1	1,9	0	Drawer Cab	Unit Price Door		Door, Handle
3033	BD4 Drawer		860	500	560	0	0	0	0	Jobman_C	1	1,9	0	Drawer Cab	Unit Price Door		Door, Handle
3238	BDBin		860	500	560	0	0	0	0	Jobman_C	1	1,9	6.875	Base Cab	Unit Price Door		Door, Handle
3070	Benchtop		20	3000	600	0	0	0	0	Jobman_ORD.cvc		10	0	Benchtop	Unit Price		Benchtop
57	BEP Floor		860	16.5	560	0	0	0	0	Jobman_C	3	6	0	Panel	Unit Price Panel		Panel
3035	BEP Kick		860	16.5	560	0	0	0	0	Jobman_C	3	6	0	Base Cab	Unit Price Panel		Panel
177	BFiller Flush Floor		860	50	560	0	0	0	0	Jobman_C	1	1	0	Filler	Unit Price Door		Door

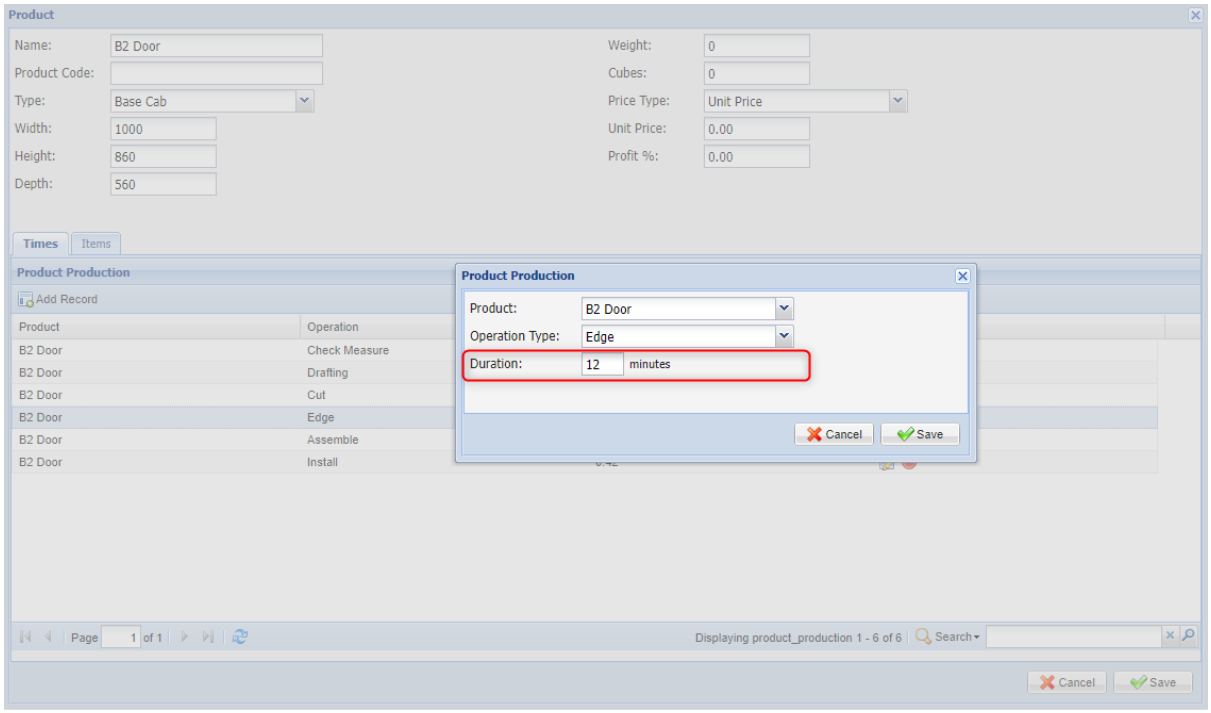
5. Customising the specific product parts further to suit the products in Jobman is easy to do once you have completed the above step #4. We will need to go into each cabinet where required and customize it as per its specifics. Example: A B1 Door cabinet will have 1 x Door Part, and a B2 Door cabinet will have 2 x Door Part required, however keeping mind the initial door part will be set up with the parametric measurements being 100% of the height and 100% of width for the linked style type, therefore if you apply the same to a 2x door cabinet you will be

overcharged for the material. So, you click on edit the Door, change the width % to be 50% and the qty of the Door will be 2, if it's a 3-door cabinet, you follow the same principle of changing the item type from Part to Style and then input the 100% for item height and 33.33% for the item with, add qty of 3 and click save. You will require to adjust the Drawer Front and Drawer Back parts also, the item width % will stay at 100%, however, the item height % will need to change as the qty increases, for example, 2x drawer front will need to be item height is 50% for qty of 2.

6. The final step of setting up the product is to check/edit the operation times that are assigned in minutes against the main job operations that you require to charge labour, which will calculate in the quote converting the assigned minutes into hours for those operations and also calculating against the default labour charge out rate ($ value of this overhead cost). It's best recommended to work on an average number of minutes for the operation times, you will always have a case of a staff person who can perform a certain task quicker than an apprentice for example, so when adding in these times, you will need to keep this in mind and set an average. Don't forget you can still always add more Labour to the required operation in the quote, so you don't need to get too precise with operation times, to begin with, however, over time you can adjust the minutes on products as you start to gather actual job task time recorded data from staff on jobs.

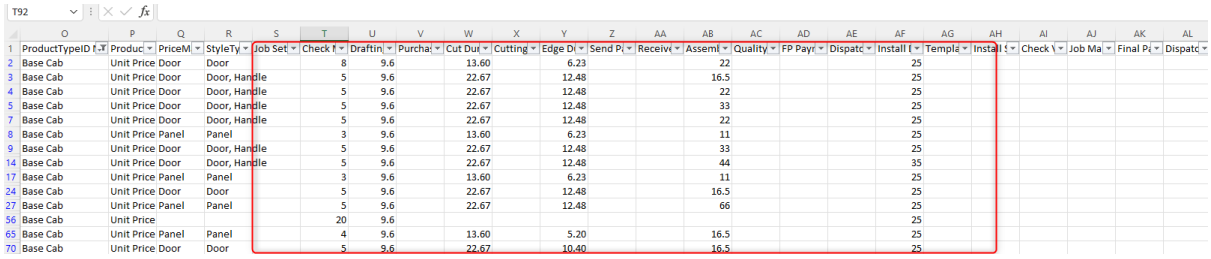


Once you click edit record for an operation time, as shown below you can increase or decrease the number of minutes you estimate on average this operation would take just for this product. Once updated, click save and the time is updated. Note: for product labour to auto calculate in a quote, you will need to add a new item, select the type to be product labour, and it's best to add this in under the last product line item in a quote, so times can calculate from the bottom upward to the top of the quote.



If you require to make a bulk amount of minute adjustments for your products, it's recommended to Export the product library into the CSV to Excel, then from column S onward on the Excel sheet is where the minutes are populated on the current selection of operations. You can add in values (minutes) against operations that currently don't have any time assigned, and also clear/delete time that is not required against an operation.

Shown below, the highlighted section is where the values are populated for the operation times (minutes) per product, again best to activate the filter option on the Excel sheet, and you can filter by product type which will help keep the times consistent across the product type (category) and increase the time slight if the product has more doors, drawers, etc as required.



	O	P	Q	R	S	T	U	V	W	X	Y	Z	AA	AB	AC	AD	AE	AF	AG	AH	AI	AJ	AK	AL
1	ProductTypeID	Produc	PriceM	StyleTy	Job Set	Check I	Draftin	Purcha	Cut Du	Cutting	Edge Di	Send Pi	Receiv	Assemt	Quality	FP Payr	Dispatc	Install I	Templa	Install S	Check \	Job Ma	Final Pi	Dispatc
2	Base Cab	Unit Price	Door	Door		8	9.6		13.60		6.23			22				25						
3	Base Cab	Unit Price	Door	Door, Handle		5	9.6		22.67		12.48			16.5				25						
4	Base Cab	Unit Price	Door	Door, Handle		5	9.6		22.67		12.48			22				25						
5	Base Cab	Unit Price	Door	Door, Handle		5	9.6		22.67		12.48			33				25						
7	Base Cab	Unit Price	Door	Door, Handle		5	9.6		22.67		12.48			22				25						
8	Base Cab	Unit Price	Panel	Panel		3	9.6		13.60		6.23			11				25						
9	Base Cab	Unit Price	Door	Door, Handle		5	9.6		22.67		12.48			33				25						
14	Base Cab	Unit Price	Door	Door, Handle		5	9.6		22.67		12.48			44				35						
17	Base Cab	Unit Price	Panel	Panel		3	9.6		13.60		6.23			11				25						
24	Base Cab	Unit Price	Door	Door		5	9.6		22.67		12.48			16.5				25						
27	Base Cab	Unit Price	Panel	Panel		5	9.6		22.67		12.48			66				25						
56	Base Cab	Unit Price				20	9.6											25						
65	Base Cab	Unit Price	Panel	Panel		4	9.6		13.60		5.20			16.5				25						
70	Base Cab	Unit Price	Door	Door		5	9.6		22.67		10.40			16.5				25						

Note: When the times have been updated, save the Excel file and then you can import it back into Jobman, and as the product already has an existing ID assigned, these will simply update the changes made to them. You will now have products ready to start creating into your Quote pre-sets and then start adding to your quotes.