Jobman
Manufacturing Software

Set-Up Training Plan JM 1.0

Video Session #1

Gain an understanding of and learn how to set-up and navigate the Jobman software. Link accounting software, cloud storage and set-up job management files. Set-up staff and create user profiles and roles. Understand how the touchscreen & mobile interfaces work by tracking time spent on jobs.

- Introduction to the Jobman training plan and Academy.
- Logging in to Jobman.
- Navigating the software and understanding how to customize the config setting, link Xero and cloud file storage server.
  Note: MYOB & QBO will require a quick Zoom session for a walk through. Please schedule this using the link to the Bookings calendar on the Jobman Academy prior to your first training session.
- Set-up the template to copy files.
- Set-up staff members and permissions for access levels and staff types.
- Customizing columns and display - each user can customize their screens.
- Set-up key features – business hours, contact types, preferred contact methods, customer sources etc.
- Gain an understanding of how to use the touchscreen/mobile interfaces for staff to log time against jobs or leads.
- Gain an understanding of database structures and data records which use ID's and the dangers of deleting data from the software.

Items for set-up and completion:

☐Create a Jobman Academy account at https://academy.jobman.com.au/my-account/

☐Connect accounting software.

☐Connect your cloud file storage account and set-up your file folder directories for **Leads** and **Jobs**.

☐Add staff and create usernames, password, pin code, access level, and staff type/s assigned.

Note: start practicing recording of time by logging time against internal Job #100 (Staff Bundy Clock), and select the Labour Centre, Job Task of General Duties.

☐Set-up the **CONFIG** settings as demonstrated in the training video.

☐Set-up the business hours and public holidays as needed.

☐Edit/Add in Contact Types, Contact Source, and add Delivery Areas if needed.

☐Edit/Add in required Areas (typically rooms such as kitchen or laundry).

☐Contact preferred suppliers to request a recent purchase history. These products are populated onto the Availability Chart template provided. **Importing Availability Chart items using the template is covered in video #3. See the section on Integration in the Jobman Academy for more information.**

Resource templates required*:*

☐Blank Availability Chart Template

☐Copy of Jobman Training Plan

Video Session #2

Create Leads, assign Leads/Jobs and create checklists for job operations. Understand spec sheets, Quoting and learn how to import 3rd party drawing software.

- Set-up Spec Question Groups and Spec Questions; save Spec Sheet pre-sets when needed.
- Turn a Contact to new lead/job.
- Overview on how to do a Quote in Jobman.
- Understand Availability Chart Items, Product Parts, Products, Style Types, and Styles.
- Demonstrate Quote Pre-sets and use of Sections in Quotes.
- Quote statuses, duplicate quotes, and control new/existing quotes by status.
- How to create an invoice in a Lead for a deposit payment from an accepted Quote.
- Steps to allocate Quoted sections into separate work orders.
- Turn the Lead into a **Job**.
- Import 3rd party drawing software and price using Styles.

Items for set-up and completion:

☐Edit/Add in Spec Question Groups and Spec Questions as needed.

☐Generate a Spec form under a test lead/job, pre-fill the questions with answers, and save this as a Spec Question Pre-set.

☐Set up lead/job types, statuses, operation types, and target lead times.

☐Create a test lead/job to see how the checklist works and progresses.

☐Create a quote in a lead, apply the existing styles under the current style types, and add the existing Section Quote pre-sets. This will show how all the quote functions will link together.

☐Update a test quote to **'Quote Accepted'** and try the feature **'Allocate Sections To Work Orders'**, click **'Set Up'**. This applies quote sections into separate work orders, click **Save**. Complete the Lead Checklist to convert lead into a job. Check under **Jobs** and review the work orders to see how segments separately attach to the parent job.

Resource templates required:

☐Lead & Job Process Maps

Video Session #3

- Demonstration of the setup/editing of Product types, Parts, Products, Operation times.
- Understand how to update/add the Quote Pricing items in the availability charts, understand how to edit/ add style types, how to change/duplicate styles, and link the Quote Pricing item to each style name.
- Building Quote presets for products, labour, benchtops, accessories, and even Section presets.
- Edit Quote Template and demonstrate notes and display fields.
- Set-up Brands, Stock Types, Stock Suppliers.
- Create a Purchase Order from Raw Materials.
- Import a complete Availability Chart items template, how to correct any errors, add in Stock Types or Rate Type and Stock Supplier.

Items for set-up and completion:

☐Set up the Product types, and product parts as needed.

☐Edit/Rename the Products in Jobman to reference the same name as in the CAD software.

☐Adjust operation times on products to suit your manufacturing process and times.

Note: export the products in Jobman into a .CSV file, save, update the product names and times, Save As a new .CSV file, import back into Jobman. This will update these in a bulk format.

☐Complete set-up needed for the Availability Chart quote pricing items. Add and change additional Style selections.

Note: The Quote Pricing Template Guide will help you with calculating the correct Unit and Sell Unit Price for your required items, you can then easily update the Quote Pricing Brand availability chart items.

☐Build/edit Quote Presets. Edit/Change the quote template and start to produce quotes.

☐Update Default Labour Charge Out Rate in the CONFIG settings.

☐Review the quote templates, edit/add information as needed so quotes are ready to be sent.

☐Create a test quote, apply updated styles under **Style Types**, populate quote with defined presets.

☐Import a completed Availability Chart Items template for a supplier.

Resource templates required:

☐Quote Pricing Guide

☐Overhead Calculation Excel Sheet

☐Product Set Up Guide

☐Populated Availability Chart Items Template

Video Session #4

Understand the flow of a lead turning into a job, assigning job raw materials, and creating purchase orders. Set up of the labour centres and agenda screens to increase factory productivity.

- Transition a Lead into a Job and apply multiple Job Types. Understand how more job types are assigned to one job, which will also apply extra operation types needed, and how this will extend overall target lead times of the job completion.
- Learn how to apply target dates, and how this set-up of the parent job can be copied to the created work order.
- Create a Purchase Order from Raw Materials.
- Import a complete Availability Chart items template, how to correct any errors, add in a Stock Types or Rate Type and Stock Supplier.
- Learn how to update Availability Chart items from within Job Raw Materials, and how these can auto-update the item.

- Learn how to add/select Raw Materials in a Job, assign the source type for Stock or Purchase Order, and understand how to create a Purchase Order for either a job or batch Purchase Ordering for multiple jobs from one supplier.
- Send the Purchase Order from Jobman to suppliers, know how to change the Purchase Order status and how Fully Received/Delivered will create the invoice and sync with accounting software.
- Learn how the purchase order items once delivered flow into the Warehouse items assigned to the job, and how to use the job Picklist to tick off the removed items when picked and used on the job.
- Understand how to set up the required Labour Centre, and how they link to work together with Capacity Planning, Agenda Screens, and the Touchscreen interface.

- Understand how to set up and name Agenda Screens.
- Explain how to change the priority of the Production Specs and add a message to Agenda Screens.

Items for set-up and completion:

☐Finish refining Labour Centres and Agenda Screens set-up to meet workflow requirements. This will automate job management for all staff.

☐Enter current Jobs into Jobman, apply the required job types, set operation durations, target dates, so then schedule into the Target Calendar.

☐Start having factory staff log time against actual job numbers and selecting the tasks they must begin/complete.

☐From recently added supplier availability chart items, Assign to Store (add in as stock) for the inventory items available on hand.

☐Test out assigning some raw material items in a job using both items in stock and items on a purchase order.

☐Create and send a supplier purchase order.

☐Set up invoice accounts for both Customer and Supplier (bill) type invoices. Enter the account codes from the accounting software to match exactly in Jobman to allow sync to occur.

Video Session #5

Learn how to set email triggers and job alerts. Set-up Payroll (if applicable). The Jobman Champion should now be comfortable with the software and ready to train other staff on how to use and implement the software.

- Learn the functionality of the target calendar for jobs/leads, understand how to review capacity planning and filter by labour centre. Further explore Production Specs and how to change the priority of a job and understand how to activate more columns.
- Set-up Corro Templates and show Template Variables on Jobman Academy.
- Demonstrate adding tasks to a job and an overview of the operations tab.
- Learn how to create work orders, as needed for the parent job. Understand how to add a variation for a job.
- Set-up Alerts, Alert statuses, and how to create work orders from Alerts.
- Set-up up email triggers for leads/jobs and how to automate communication for external/internal use.
- Set up Payroll for staff in Jobman (if applicable).

Items for set-up and completion:

☐ Updating purchase orders and receiving items that have been delivered.

☐Staff should now be ticking/updating Job Picklists once items from warehouse are taken for a job.

☐ Set up email triggers needed for both Leads and Jobs.

☐Edit/change the corro, invoice, and purchase order templates to suit your requirements.

☐Create the Alert types and Alerts statuses that are needed to report and manage these.

☐Review and edit staff timesheets now that they are recording time against jobs.

☐Understanding of how to add/manage job variations.

☐Set up your Payroll for staff in Jobman if applicable.