moraware

JobTracker Getting Started Guide

What's covered?

Our goal is to help you get to the point where you can erase your white board and stop creating paper job folders – as quickly and painlessly as possible.

This guide will help you:

SECTION 1 – CREATE ADMIN LOGIN AND ADJUST DEFAULT SETTINGS.

1. The first visit to JobTracker will prompt you to create an administrative user. This **Admin User** will create accounts for your other JobTracker Users and assign them security roles.
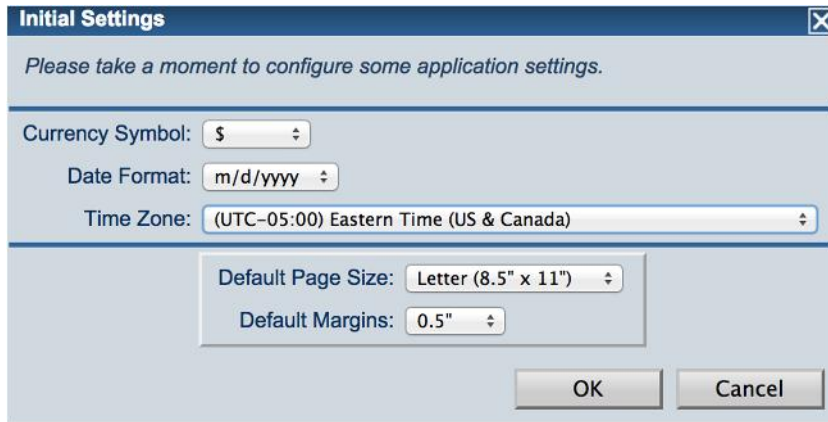
2. The choices you make in the **Initial Settings** window will apply to all users in your organization. Make selections and click **OK**.

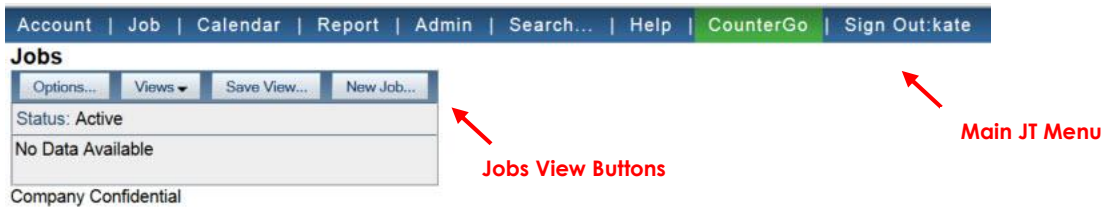Your startup view will look something like this:
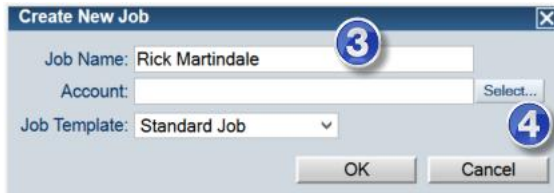
Note: The green CounterGo menu item will only be visible if you also subscribed to CounterGo to create quotes.

SECTION 2 - CREATE YOUR FIRST JOB

1. Gather the quote and contract paperwork you have for a Job you are ready to schedule.

2. Click **New Job…** button. (If you already moved away from this screen, go to **Jobs>View Jobs** to get back the view pictured above.)

3. Enter the name of the job (typically the customer name or location).

4. Then click **Select…** to create an Account.
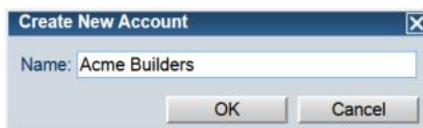
> **Decision Required.** Every **Job** must be assigned to an **Account**. Accounts can be builders, dealers, individual homeowners – whatever makes sense for the way you do business.

- If you work with builders or dealers, those Accounts are usually pretty straightforward. It makes sense to assign individual Jobs to those Accounts.

- Homeowners or other "standalone" jobs require a decision. Some JobTracker customers create a separate Account for each homeowner (thinking even homeowners might become repeat customers), but others create one Account called "Retail" to which they assign all homeowners (or other standalone retail jobs).

5. Click **New Account.**

6. Type in the Account Name and click OK.

7. Now you will see the main **Job Detail** window for your new Job. Starting with **Job Info** and working your way down, add as much detail as you can at this point – as long as the information is important to the way you do business.

For example, if you don't track Jobs by Salesperson, don't bother adding information for that field. If you do, click **Edit Job Info** and add a **Salesperson** for this Job.

Caution: It is not a good idea to *add fields* to your Jobs at this point. Most job-related information is better tracked in Forms – which are covered in the **Section 4**.

8. Click the **Job Address** button to add contact name and address for Job.

9. If you have time, it is useful to enter the contact information for your Accounts as you create new Jobs. Click **Edit Address** and/or **Account Contacts** (for designers, property managers or other people associated with the Account) to add that information. It will be saved so you won't have to enter it again next time you create a Job assigned to that Account.

If you are using a generic Account such as "Homeowner" or "Retail," you would leave the **Account Address** blank.

You can repeat this process for a couple of other new Jobs to establish a feel for it, or you can proceed directly to **Section 3** with this first Job.

SECTION 3 – SCHEDULE AN ACTIVITY

Activities are the engine and transmission of JobTracker. If you commit to entering and updating Activities, then JobTracker will prove a powerful vehicle to drive your business operations.

Decision Required. As you see, JobTracker comes with **Template**, **Fabrication** and **Install** pre-loaded and added to new Jobs.

- Many of our customers schedule only these three steps over the course of a Job, while other customers find it necessary to schedule additional steps.

  For example, some might add **Invoice** as an Activity for their business office, or large shops might need to replace the single **Fabrication** step with multiple steps like Saw, CNC and Polish.

- *We strongly recommend keeping things as simple as possible, especially as you're getting started.* You can always add more steps later.

- We also recognize, however, that you won't commit to using JobTracker unless it reflects the way you really do business.

If you decide that you need to customize the Activities, we will cover that process a little later in this guide, after walking through the basic steps to scheduling an Activity.

Now let's schedule the **Template Activity** on this first Job.

1. From this **Job Details** window, click **Template** and choose **Edit Template**.
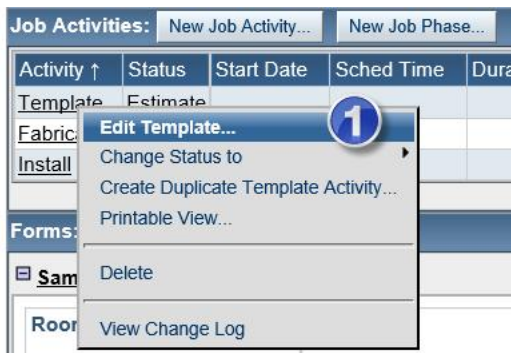
2. In the **Edit Job Activity** window, enter the **Date**, **Time** and **Duration** of the Template Activity. We suggest that you leave the Status marked as **Estimate** unless you have already **Confirmed** the date and time with the customer.

> *Note: If the expected duration of an activity is longer than a single work day, you will need to use the Activity Series feature covered in our online Help. For now, enter a duration that is shorter than 8 hours.*
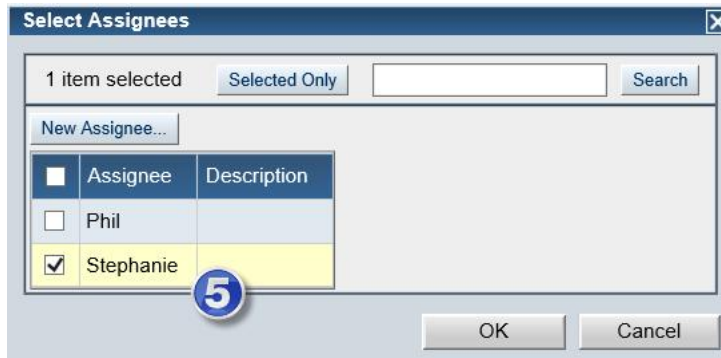

3. If you are ready to assign the Template Activity to a specific person, click Select.

4. Click New Assignee to add the name(s) of your Template staff. Enter names and click OK.

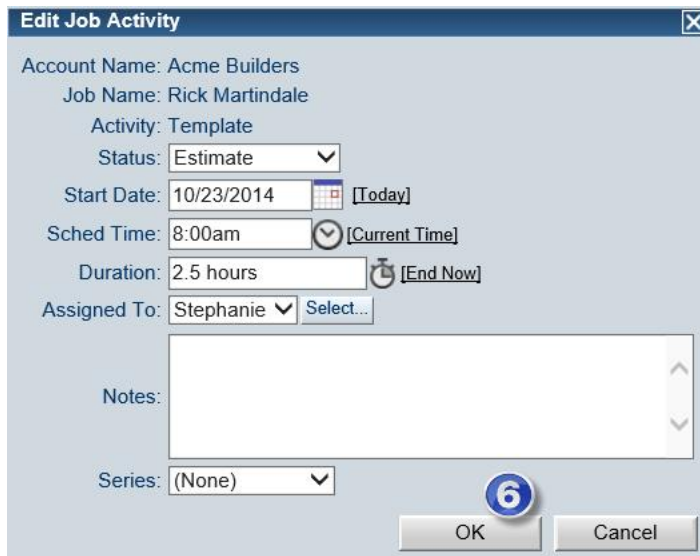5. Check the person assigned to this Activity and click OK.

6. Click OK in the Edit Job Activity window.

SECTION 4 – CUSTOMIZE THE SAMPLE JOB FORM & ENTER INFORMATION

You probably have a number of different paper forms that you use over the course of a Job. **Job Forms** are a powerful alternative to those paper forms.

Once you enter information in a Job Form, you can then pull that same information to create a variety of printable forms for your crews, as well as multiple reports for management or purchasing (e.g., a report to show total installed square feel by installer per month).

Decision Required. To get started, decide what information you want to capture from your existing quote or contract. If you already have a paper form that you would usually complete and put in a job folder at this stage, take a look at that form too.

1. Take a look at the **Sample Form** that comes preloaded in JobTracker. Decide on a name for this first form – maybe something like Job Worksheet or Intake Form – something that reflects the way you run your business. Click on the words **Sample Form** and choose **Edit Form Template**.

2. In the **Job Form Template** window, click the **Edit Form Info** button if you want to rename the Sample Form.

3. Enter a name for this first form and click **OK**.

4. To add a field to this form, click the **Fields** button and choose **Add Form Field**.

Form Fields can pull data from existing **Job** or **Account** fields or even fields in other **Forms**, or they can serve as a place to enter new information.
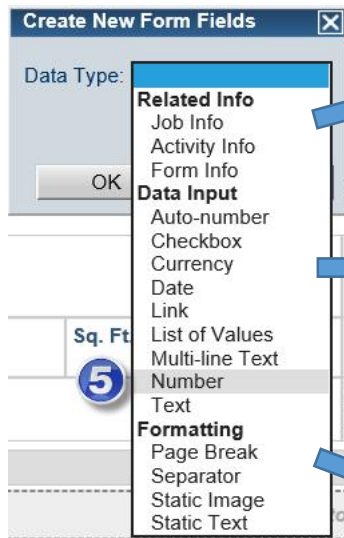
These fields are used to pull information from other places in JobTracker – so you don't have to reenter the same data.

These fields are used to enter and track additional data in JobTracker.

These fields are used to change the way your form looks if it is printed.

5. For this example, I'll add a **Data Input** field to record notes about specific rooms – the kinds of notes that your Templator might jot down in the margins of a paper form. I'm going to choose a **Multiline Text** field.

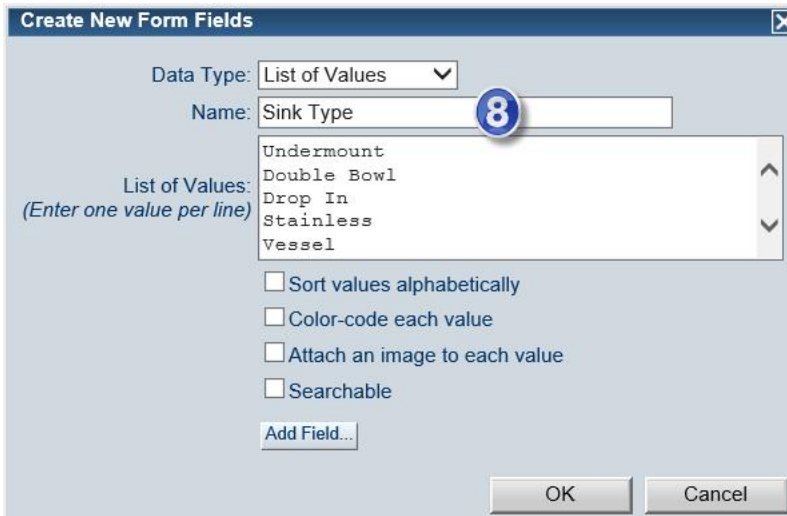6. I will give the field a name and click **OK**.
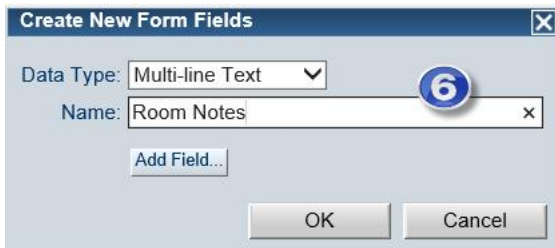
7. The new field gets added at the bottom of the template, but you can click and drag to move it. The double-arrow icon shows you where the field will "land" if you let go of your mouse.

8. You might also want to add a field with a dropdown list of options.

   For example, I will add a field to select a Sink Type from a list. After clicking the **Fields** button and choosing **Add Form Field**, I choose **List of Values** as my **Data Type**. You type in the options you want to appear in the dropdown list, and uncheck the **Sort values alphabetically** if you want to the order to stay the way you have it listed.

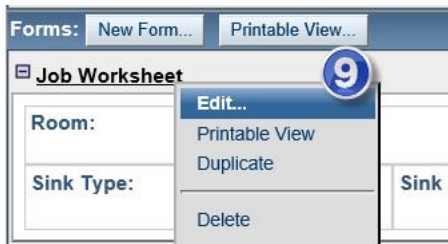   Click **OK** and move the field to where you want it to appear in your form.

9. Your changes to the form are saved as you go. Once you have made the changes you want to make to this initial form, click the back button in your web browser to return to the **Job Details** window.

   Note: Instead of using the back button you can also go to **Jobs** on the Main Menu in JobTracker and choose **View Jobs**. There you will see the Job that you started.

   Click on the **Job Name** and chose **View Job**. Now let's enter the information you need for this first Job into your new Job Form. Click on the name of the form and choose **Edit**.

10. In the **Edit 'Job Worksheet'** window you can enter data easily. If you don't have all the information today, you can update it at any time. Enter your information and click **OK**.

Caution: If a Job has more than one room, it is better to add second copy of the Job Form than to add fields for a second room on a single form. It will make reporting easier later on.

To add a second Job Form for another room, click **New Form** and choose the form you just created. Edit the Form just like we did for the first room.

SECTION 5 – ATTACH RELATED FILES TO A JOB

One of the big payoffs to using JobTracker to manage your business workflow is always having customer information readily available – not off in a crew member's van or buried in a stack of folders.

- For this reason, you may want to scan the paper files you already have for the Job you just entered, especially signed agreements.

- You can also attach Word, Excel, PDF, CAD or other electronic files that are related to a job.

Click the **Attach File** button.

1. Click **Browse** and locate the file you wish to attach. Click **OK**.

You've now created a new Job, scheduled the Template Activity, and entered the important details in a Job Form. Before we move on to the Calendar, it would be useful to enter a few more new Jobs following these same steps.

SECTION 6 – CUSTOMIZING YOUR CALENDAR VIEW

If you've been using a white board or a Google app to schedule activities, the Calendar view in JobTracker will probably look familiar. I've added two more new Jobs and scheduled the Template Activity for each.

1. To view scheduled Activities on the Calendar, go to **Calendar** on the Main Menu and choose **View Calendar**.

2. By default, the Calendar displays the **Date** vertically on the left and **Time** horizontally across the top. Activities are color coded by **Activity Type**. Since I only scheduled my Template Activities, everything on my Calendar is green.

   But suppose I want to see which of my Templators is assigned.

   Any time you want to change the Calendar View, click the **Options** button to make changes – and if you create a View you like, click **Save View**.

Note: See the end of this document for information on how to change the colors.

3. In the **Calendar-Options** window, change the **Display Type** to **Day & Assignee by Time**.

4. Perhaps I would also like to see the City displayed for each Activity in this View. Click the **Select Fields** button to add or remove what information is displayed for each Activity.

5. From the column on the left, click on the field you would like to add. I am going to click **City** from the **Job Address**. It will then move to the list of **Selected Fields** on the right, and I will click **OK**.

6. Now I have a view that shows **Template Activities** grouped by **Day and Assignee** (with Phil and Stephanie listed to the left) and displayed by **Time**.

   I can reschedule Activities directly in this View. For example, I can see that I have Phil driving from Brenham to Houston. If I choose to reassign the 11am Activity to Stephanie, I can drag and drop the Activity directly in this Calendar View.

7. If you decide a view is useful enough that you want to save it, click the **Save View** button.

8. Choose **Shared View Name** if you want to make this View available to other JobTracker Users in your company. Give this View a name that you will remember and click **OK**.
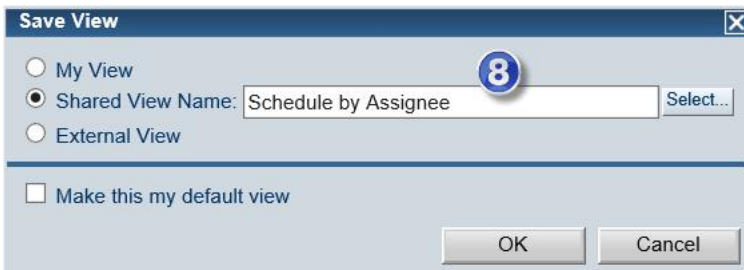
9. Next time you want to return to this View, click the **View** button from within any Calendar view and then choose the view from the list.

Caution: In this example, we only have Template Activities schedule. If Fabrication and Install Activities are also scheduled, those Activities will also be visible in the Schedule by Assignee view.

For example, this is the same view after I've added two more Jobs and scheduled Fabrication for this week:

So I might want to go back to **Options** and set my **Activity Type** to **Template** so only the scheduled **Template Activities** will display.

Then I'll click **Save View** again and name it **Template Schedule**. This process of creating custom, saved Views is very useful when viewing by Calendar or by Jobs. Once you get more Jobs entered, it is worth taking some time to experiment with Views.

As we covered earlier, Job Forms take the place of most of the paper forms you might have used to gather information about a Job. Calendar Printable Forms take the place of the person who photocopies or reenters all of that paperwork and prepares it for your Field Crews.

1. From the JobTracker Main Menu, click **Calendar** and choose **Calendar Settings**.

2. Click on Calendar Printable Forms. JobTracker comes preloaded with a **Form Template** called **Activity Details**. You can customize this Template much the same way that you edited the Job Form Template.

3. Click on the **Activity Details Template** and choose **Edit Form 'Activity Details.'**

4. Click **Edit Form Info** to add your company name and logo. You can also add and delete fields or change the format like you did with the Job Form Template.

5. Next, click on **Activity Packets** to choose what information you want to group together to create printed Job Activity Packets for your Field Crews.


6. Click **New Activity Packet**, type in a **Name**, and click **OK.**

7. Click the Add button and select the information you want to include in the printed Job Activity Packets for you Field Crews. I will choose the Calendar we just edited first.

You will see the **Activity Details** Calendar Form we just edited.

8. Click **Select** to choose which **Activity Type** should get this information in the Field Crew Packets. For this example, I choose Template and Install. Click **OK** and **OK**.
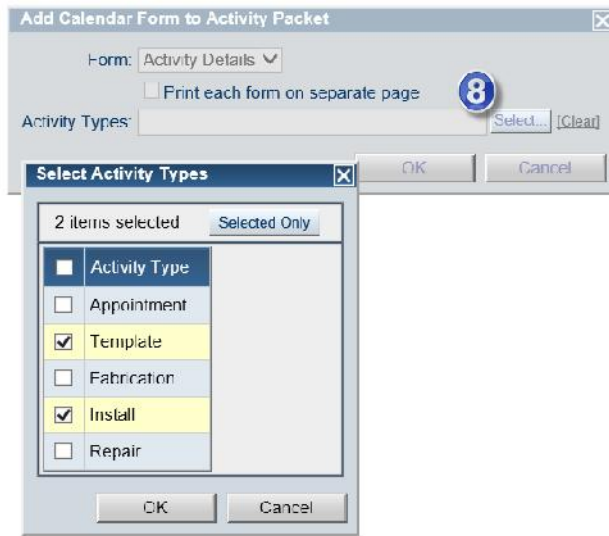
9. Click Add again to select your Job Form and any of the files you attached.

10. Now click return to our Calendar View by clicking View and choosing Schedule by Assignee. Click the **Printable View** button.

11. Choose the **Date** of the Activities you wish to print, and click **Job Activity Packet**. You will see the **Field Crew** packet we just assembled listed there. Click **OK**.

12. You will get a PDF that pulls together all of the information you selected for your Template crews, and the information will be compiled into printable documents and sorted by Assignee – so all you have to do is print this one PDF and you'll have all the paperwork your Template crews need.

SECTION 8 – ADDITIONAL TOPICS

We are always adding and updating the help articles that are available online. Just click Help on the Main Menu and choose **Moraware JobTracker Help**.

Here is a list of a few of the topics that might prove useful as you continue to customize JobTracker to fit the way you do business.

- Activity Series – If you need to schedule an Activity over multiple days, create an Activity Series.

- Custom Fields – You can track additional information for every Job – like a Job Number, referral information, or date – by adding a Custom Job Field.

- Job Issues – Job Issues are like a sticky note that you might attach to a paper folder to make sure everyone notes important information.

- Customizing Job Activity Types – You can add new Activity Types or change the default properties like display Color or Duration.

- AutoSchedule – You can use AutoSchedule to automatically put tentative dates for some Activities on your calendar based on the Date of related Activities.

- Job Templates – You can set the Activities and Forms that will be included by default on a New Job by changing your Job Template.

- Job Activity Sets – You can add multiple Activities to a Job in one step by creating Job Activity Sets.

- Job Views – Just like we created custom Calendar Views in Section 5, you can use Job Views to create To Do Lists and to help you manage your daily tasks.

- Create Additional Job Tracker Users – The Admin User account you created in **Section 1** can create additional users and assign them permission to view and/or edit different information.

- Reports – Similar to Job View, Reports can be used filter, sort and group information that you have stored in JobTracker.