



Collecting & Communicating with Job Forms

Business Goals

Work more effectively as a team by ensuring consistent workflow

Track details about your jobs so you can answer important questions later

Pull info from JobTracker to display/print so you save time & reduce errors

Software Goals

Create forms to collect information or to use as a checklist

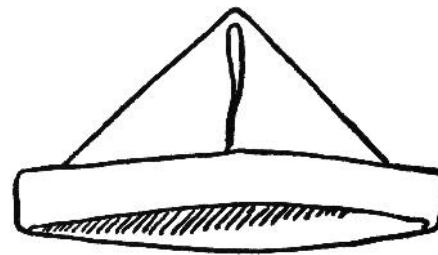
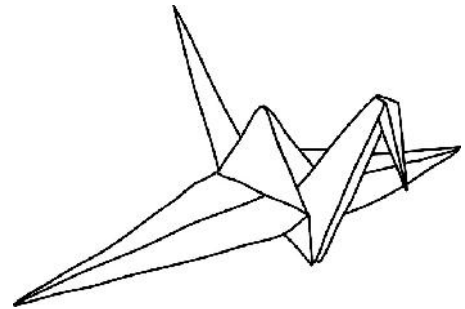
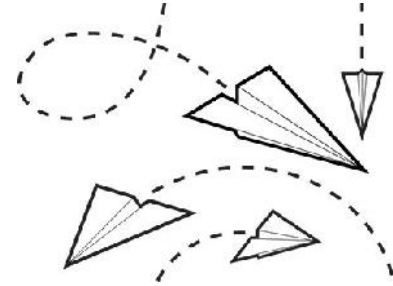
Understand the advantages of different types of Data Input options

Pull information from other parts of JobTracker, including Activities and Forms

Customize and format forms for communicating clearly on screen and in print

3 Main Purposes

- Collecting Data
- Communicating Information
- Procedural Checklist



Purpose #1 – Collecting Data

☐ **Countertop Details - main counter**

Room type: Kitchen			
Material: Granite	Color: Absolute Black	Sqft: 84	Edge: Bullnose
Sink type: Farm	Sink Model: blanco 12345	Sink in stock: yes	Faucet info:
Notes: Signed off on slab image			



The power of Reporting...



Knowledge

Victory

Prosperity

Power

Camaraderie

Courage



One Ring to Rule Them All...

One Field to Count or Sum

Details Form

Material

Color

Sq Ft

Edge

Sink Info

To improve Reporting, improve your Forms.

Details Form

Material
Color
Sq Ft
Edge
Sink Info

*Other fields for sorting,
grouping, or filtering*

Sum or Count One Field at a Time

*Other fields for sorting,
grouping, or filtering*




Job Forms enable (or impede!) reporting...

Granite Form

Material
Color
 Sq Ft (granite)
Edge
Sink Info

Quartz Form

Material
Color
 Sq Ft (quartz)
Edge
Sink Info

JOBTRACKER WILL NOT SUM
TWO DIFFERENT FIELDS – EVEN
IF THEY'RE NAMED THE SAME.



Details Form

	Material Room1
	Color Room 1
	Sq Ft Room 1
	Edge Room 1
	Sink Info Room 1
	Material Room 2
	Color Room 2
	Sq Ft Room 2
	Edge Room 2
	Sink Info Room 2



JOBTRACKER CAN ONLY ADD UP THE NUMBERS
IN ONE FIELD AT A TIME – EVEN IF THE FIELDS ARE
ON THE SAME FORM.



Look to the future.

What questions/reports are important to you?

You will need one form and one field for the thing
you want to count.


Use a single countertop details form

Details form

Room
Material (granite)
Color
Sq Ft
Edge
Sink Info

Details form

Room
Material (quartz)
Color
Sq Ft
Edge
Sink Info



This is the same form used twice – once for granite, once for quartz.

Account

Job

Phase 1

Phase 2

Job

Activities

Files



Details Form

Material
Color
Sq Ft
Edge
Sink Info

Activities



Details Form

Material
Color
Sq Ft
Edge
Sink Info

Files

Activities



Details Form

Material
Color
Sq Ft
Edge
Sink Info

Using a simple details form also makes it easier to keep track of phases.

Purpose #2 – Communicating

When creating a form...

- Who will be using the form?
- Where will that person be?
- What happens to the information next?
- Do you need to get a signature?



Paper is not a dirty word – but JobTracker can make it cleaner

Communicating with customers & staff

☐ Template Sign Off

Job Name:
Joey Austin's Kitchen

Job Creation Date:
10/30/2014

Job Number:
S3073

Account Name:
Joey Austin

Job Address:
Joe & Donna Austin
1824 Spring St.
Houston, TX

Template:

Date	Sched. Time	Assigned To	Notes
1/27/2017	11:00am - 1:30pm	Norm	confirm slab images; ask about laundry room

Install:

Date	Sched. Time	Assigned To	Notes
2/14/2017	8:00am - 12:00pm	Install Crew #2	Flexible re date but must be before 1/25. Confirm 3 days advance.

Countertop Details:

Name	Phase	Room type	Material	Color	Sqft	Edge	Sink type	Sink Model	Sink in stock	Faucet info	Notes
island		Kitchen	Granite	luna pearl	35	Bullnose					selected remnant
main counter		Kitchen	Granite	Absolute Black	84	Bullnose	Farm	blanco 12345	yes		Signed off on slab image

Arranging info on page to print


Might collapse by default


☐ Countertop Details - main counter


Room type:
Kitchen

Material: Granite	Color: Absolute Black	Sqft: 84	Edge: Bullnose
Sink type: Farm	Sink Model: blanco 12345	Sink in stock: yes	Faucet info:

Notes:
Signed off on slab image


☐ Template Sign Off 

☐ Install Waiver 

☐ Customer Certificate of Completion 

Expand or collapse with + or -

Different Forms for Different Purposes



Job Name: Joey Austin's Kitchen				Job Creation Date: 10/30/2014			
Job Number:				Account Name: Joey Austin			
Job Address: Joe & Donna Austin 1824 Spring St. Houston, TX				Contacts:			
Template:				Install:			
Date	Sched. Time	Assigned To	Notes	Date	Sched. Time	Assigned To	Notes
1/24/2017	11:00am - 1:30pm	Norm	confirm slab images; ask about laundry room	2/9/2017	8:00am - 12:00pm	Install Crew #2	Flexible re date but must be before 1/25. Confirm 3 days advance.

Countertop Details:											
Name	Phase	Room type	Material	Color	Sqft	Edge	Sink type	Sink Model	Sink in stock	Faucet info	Notes
island		Kitchen	Granite	luna pearl	35	Bullnose					selected remnant
main counter		Kitchen	Granite	Absolute Black	84	Bullnose	Farm	bianco 12345	yes		Signed off on slab image

Additional Notes at Template		Template Checklist	
		Verify Accessibility to the job site:	
		<input type="checkbox"/>	
		Wall & cabinet conditions:	
		<input type="checkbox"/>	
		Requires reinforcements / supports:	
		<input type="checkbox"/>	
		Photographs of job site:	
		<input type="checkbox"/>	
		Electrical outlets position:	
		<input type="checkbox"/>	
		Refrigerator panel:	
		<input type="checkbox"/>	
		Overhangs are marked:	
		<input type="checkbox"/>	

Sometimes you design a form to use with a pen or pencil

White space is just empty boxes



Job Name: Joey Austin's Kitchen		Job Creation Date: 10/30/2014	
Job Number:		Account Name: Joey Austin	
Job Address: Joe & Donna Austin 1824 Spring St. Houston, TX		Contacts:	
Template:		Install:	
Date	Sched. Time	Assigned To	Notes
1/24/2017	11:00am - 1:30pm	Norm	confirm slab images; ask about laundry room
Date	Sched. Time	Assigned To	Notes
2/6/2017	8:00am - 12:00pm	Install Crew #2	Flexible re date but must be before 1/25. Confirm 3 days advance.

Countertop Details:											
Name	Phase	Room type	Material	Color	Sqft	Edge	Sink type	Sink Model	Sink in stock	Faucet info	Notes
island		Kitchen	Granite	luna pearl	35	Bullnose					selected remnant
main counter		Kitchen	Granite	Absolute Black	84	Bullnose	Farm	blanco 12345	yes		Signed off on slab image

Additional Notes at Template		Template Checklist	
		Verify Accessibility to the job site: <input checked="" type="checkbox"/>	
		Wall & cabinet conditions: <input checked="" type="checkbox"/>	
		Requires reinforcements / supports: <input checked="" type="checkbox"/>	
		Photographs of install:	

Printable View

Additional Notes at Template		Template Checklist	
		Verify Accessibility to the job site: <input checked="" type="checkbox"/>	
		Wall & cabinet conditions: <input checked="" type="checkbox"/>	
		Requires reinforcements / supports: <input checked="" type="checkbox"/>	
		Photographs of install:	

Edit Form Template

Can Set Form to Print Landscape

COUNTERTOP INSTALLATION CHECKLIST

INSTALLATION CUSTOMER APPROVAL

To be completed prior to installation

Standard Job #: S3073	Customer Name: Joe & Donna Austin
Job Site Address: 1824 Spring St. Houston, TX	

A. Did installer arrive within scheduled time frame?

☐

B. Is material the correct color, quantity and style?

☐

C. Is material free of visual defects?

☐

D. Has installer explained seam care and maintenance?

☐

I accept the materials and installation described in Installation
Proposal # _____ as complete and satisfactory

Customer Signature _____ Date Completed _____

Installer's Waiver and Release of Lien

To be completed after installation, yet prior to installer leaving:

A. Was installation performed satisfactory?

☐

B. Was installation area left clean?

☐

Upon receipt by the undersigned of a check from The Home Depot on behalf of the customer named above, when the check has been properly endorsed and has been paid by the bank upon which it is drawn, this document shall become effective to waive, relinquish, and forever release any right of the undersigned or any laborer, mechanic, or materialman claiming through or under the undersigned, to a mechanic's lien, stop notice, or any right against a labor or material bond on the job performed for the customer and the location listed above. The undersigned represents that all laborers, mechanics, and materialmen furnishing services or materials on the job have been fully paid for their services or materials. The undersigned agrees to cause

Customize Paperwork for Customers

Certificate of Completion	
Job Name: Joey Austin's Kitchen	
Job Address: Joe & Donna Austin 1824 Spring St. Houston, TX	
<p>In order to ensure that our jobs are being completed in a good workman-like manner and our installers are cooperating with our customers, we ask you to sign off on this certificate of completion.</p> <p>This tells us that you (as the customer), are content with our work, materials and completion of the job.</p> <p>Please review the work that has been done before signing this agreement to ensure your satisfaction is met.</p> <p>We are sure that you will enjoy your stone product for many years to come.</p> <p>Thank you for you cooperation.</p> <p>Best Regards,</p> <p>Genesis Stone</p>	
Clients Acceptance: Clients Name:	Installers Acceptance: Installers name:

Purpose #3 - Job Checklist

Job Summary

CHECK ALL BOXES BEFORE FABRICATION!

Deposit received:



Tearout:

Tearout - laminate

Change order needed:

Final Total \$:

\$5,300.00

Final quote approved:



Slabs Granite:

2

Slabs Silestone:

Material Ordered:



Material Received:



Layout approved:



Activity

vs.

Checkbox

- *You care about who*
- *You care about when*
- *You need to report on it*

- *One person handles it
(or you don't care who)*
- *You care that it's done*
- *Need to see progress – but
not reporting*

You can show checkboxes in a JobView

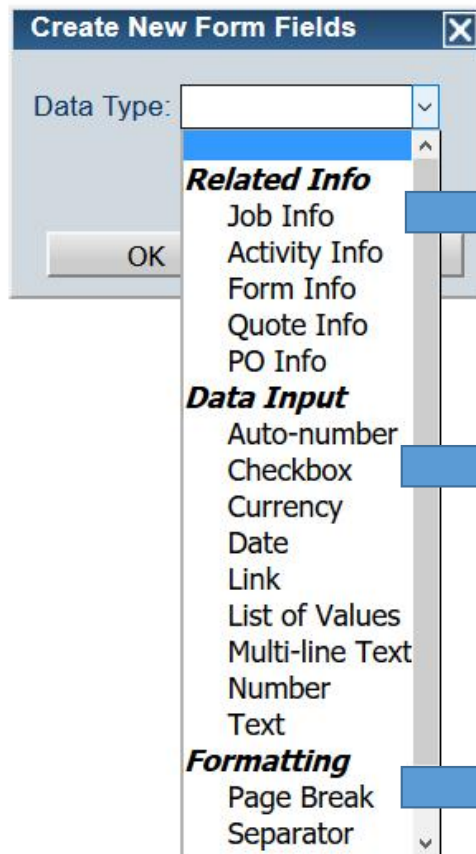
Job Name	Account	Job Creation ↓	Template - Date	Fabrication - Date	Install - Date	Job Summary				Job Issues
						Deposit received	Material Ordered	Material Received	Layout approved	
212 Elm - unit 103	Acme Builders	1/19/2017	No Date	No Date	No Date					
*292 Reserve A	Acme Builders	1/19/2017	No Date	No Date	No Date					
Katerina's kitchen	Katerina & Phil Jackson	12/7/2016	☀ 1/27/2017 (est)	2/1/2017 (auto)	2/3/2017 (est)	✓				🔗 Change order - color
Gus's kitchen	ABC Builders, Inc.	12/7/2016	☀ 1/27/2017 (est)	2/1/2017 (auto)	2/3/2017 (auto)	✓	✓			
Eileen's kitchen	ABC Builders, Inc.	11/16/2016	1/30/2017 (est)	2/7/2017 (auto)	2/9/2017 (est)	✓	✓			
Tania's kitchen	ABC Builders, Inc.	10/27/2016	2/6/2017 (est)	2/9/2017 (auto)	2/13/2017 (auto)	✓	✓			
Cory Smith	ABC Builders, Inc.	7/18/2016	1/30/2017 (conf)	2/2/2017 (auto)	2/6/2017 (auto)	✓	✓			
Ann's kitchen	Texas Kitchens	7/13/2016	1/26/2017	1/31/2017 (auto)	2/2/2017 (auto)	✓	✓	✓	✓	

(but not on the Calendar)

A List of Values field can show on Calendar

Thursday 1/26/2017	Friday 1/27/2017	Saturday 1/28/2017	Sunday 1/29/2017	Monday 1/30/2017	Tuesday 1/31/2017
(6 hours)	(9 hours)			(7 hours)	(4 hours)
<div> <div>Eddie's kitchen</div> <div>Acme Builders</div> <div>8:00am - 2:00pm (6 hours)</div> <div>100</div> <div>Tearout - stone</div> <div>Katy, TX</div> <div>Incomplete install</div> </div>	<div> <div>Jeff Cotes</div> <div>Lowe's #620</div> <div>8:00am - 12:30pm (4.5 hours)</div> <div>72</div> <div>Tearout - laminate</div> <div>Mesquite, TX 75187</div> </div>			<div> <div>Conner Dre</div> <div>Max Construction</div> <div>8:00am - 3:00pm (7 hours)</div> <div>50, 44, 78, 35</div> <div>No Tearout</div> <div>Plano, TX 75094</div> </div>	<div> <div>Denise Turner</div> <div>ABC Builders, Inc.</div> <div>8:00am - 12:00pm (4 hours)</div> <div>78</div> <div>No Tearout</div> <div>Irving, TX 75063</div> </div>
	<div> <div>Conner Dre</div> <div>Max Construction</div> <div>1:00pm - 5:30pm (4.5 hours)</div> <div>50, 44, 78, 35</div> <div>No Tearout</div> <div>Plano, TX 75094</div> </div>				

Form Field Data Types



The screenshot shows a dialog box titled "Create New Form Fields" with a close button (X) in the top right corner. On the left, there is a "Data Type:" label and a dropdown menu. Below this is an "OK" button. The main area of the dialog is a list of data types, organized into three sections: "Related Info", "Data Input", and "Formatting". The "Related Info" section includes "Job Info", "Activity Info", "Form Info", "Quote Info", and "PO Info". The "Data Input" section includes "Auto-number", "Checkbox", "Currency", "Date", "Link", "List of Values", "Multi-line Text", "Number", and "Text". The "Formatting" section includes "Page Break" and "Separator". A blue arrow points from the "Job Info" option to the text "Pull info from other places in JobTracker (so you don't have to re-enter data)". Another blue arrow points from the "Checkbox" option to the text "Enter and track additional details about your jobs". A third blue arrow points from the "Page Break" option to the text "Change the way your form looks on screen or when printed".

Section	Data Type
Related Info	Job Info
	Activity Info
	Form Info
	Quote Info
	PO Info
Data Input	Auto-number
	Checkbox
	Currency
	Date
	Link
	List of Values
	Multi-line Text
	Number
	Text
Formatting	Page Break
	Separator

Pull info from other places in JobTracker (so you don't have to re-enter data)

Enter and track additional details about your jobs

Change the way your form looks on screen or when printed

Text

- *Few words and/or numbers*
- *Searchable*
- *Good for ID numbers, addresses*

Multiline Text

- *Short answers*
- *Few sentences*

Autonumber

- *JobTracker assigns a sequential number*
- *Searchable*

Number

- *Countable things (not ID numbers)*
- *Good for Reporting and Subtotals*
- *NOT searchable*

Currency

- *Money – a specific countable thing*
- *Good for Reporting or Subtotals*
- *JobTracker handles formatting*

Checkbox

- *Good for reminders*
- *Only good if only correct answer is yes*
- *Can be shown in JobView*
- *NOT good for Calendar or Reporting*

List of Values

- *Dropdown list*
- *Controls for spelling errors – Reporting!*
- *Not as useful if you have over 200 values*
- *Can add image or color-coding to list*

Date

- *Yeah... it's for dates*
- *Can specify format*

Link

- *Hyperlink to web address*
- *Used for Googledoc, online map, etc.*

VERY IMPORTANT – Do NOT delete Data Input fields!

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help | CounterGo | Sign Out:kathleen

Job Form Template

Edit Form Info... Fields ▼ Copy Job Field...

Form Template Name: Countertop Details
Processes: Job
Show on Calendar Printable View: Yes
Expand On Job Detail Page: Yes
Create in (Entire Job) Phase: No

Countertop Details		
Room type:	Template Phase: Data #1 Data #2	
Material:	Color:	Sqft:
Sink type:	Sink Model:	Sink in stock:
Notes:		

Click to add fields to the end of the form

Edit Form Field

Name: Sqft

Data Type: Number

Field Width: 1 (Relative to other fields on this row)

☐ Hide field when blank

☒ Inactive

Styles - Cell

Cell Label Value

(Leave fields blank to use Form Style.)

Border:

Inner Border:

Label Position: Width: %

Alignment:

OK Cancel

You will delete the data stored in that field.