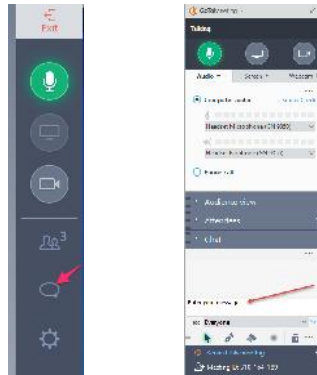




JobTracker Forms Part 1: Collecting & Communicating

- We'll get started at the top of the hour.
- I'll turn on audio at least 5 minutes early... but feel free to practice posting questions in the chat area as shown in this image!

GoToMeeting Toolbars



Collecting & Communicating with Job Forms

Business Goals

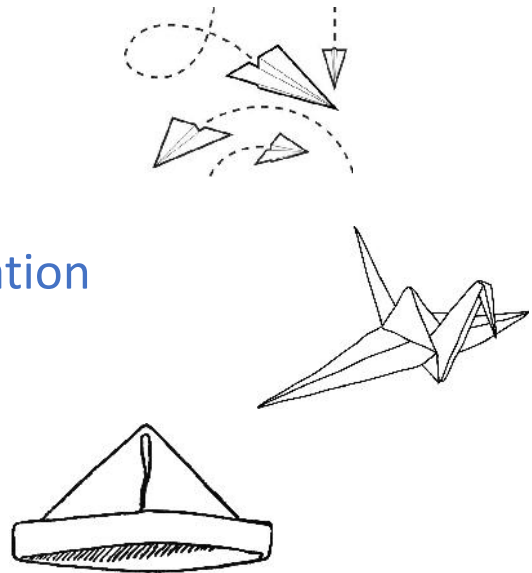
- Work more effectively as a team by ensuring consistent workflow
- Track details about your jobs so you can answer important questions later
- Pull info from JobTracker to display/print so you save time & reduce errors

Software Goals

- Understand what types of forms you need to support your business functions
- 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

3 Main Purposes

- Collecting Data
- Communicating Information
- Procedural Checklist



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

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...*





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



Look to the future.

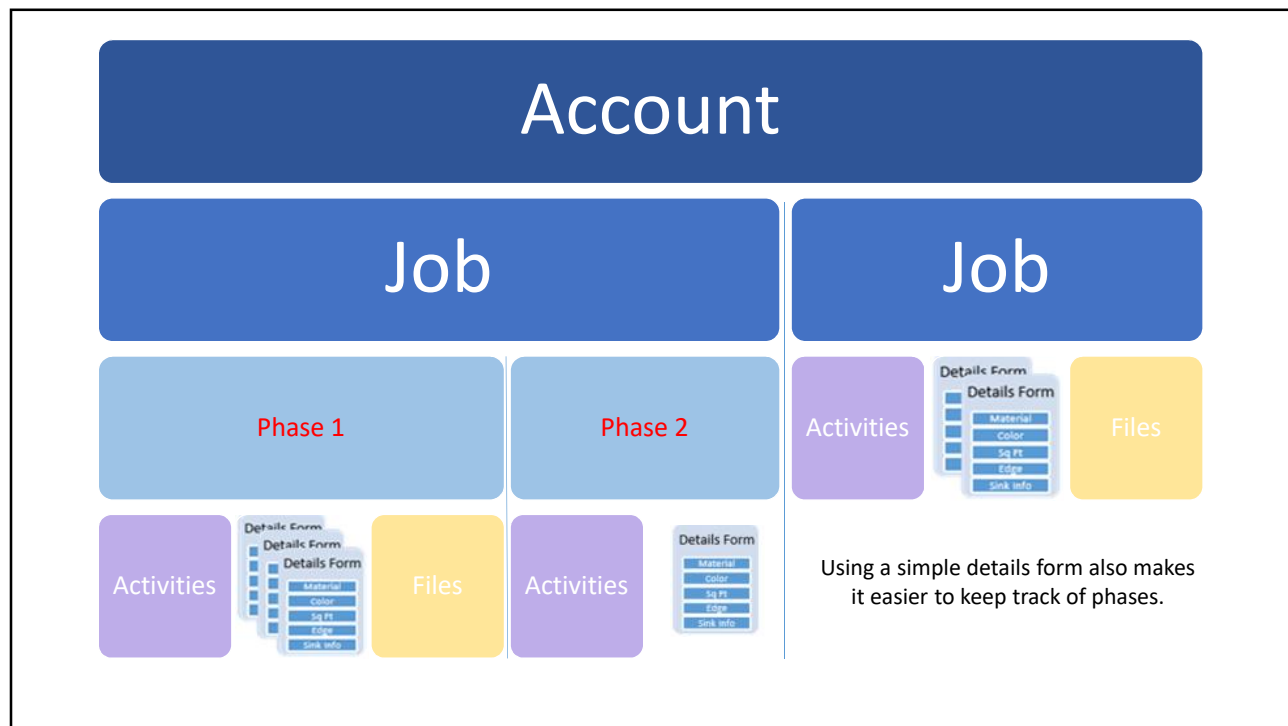
What questions/reports are important to you?

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

Use a single countertop details form

Details form	Details form
Room	Room
Material (granite)	Material (quartz)
Color	Color
Sq Ft	Sq Ft
Edge	Edge
Sink Info	Sink Info

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



Purpose #2 – Communicating

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

CopingSpace

Job Name: **Jerry Austin's Kitchen**
 Job Number: 10702014
 Account Name: Jerry Austin
 Contacts:

Job Address:
 Joe & Donna Austin
 1824 Spring St.
 Lawrence, IA
 Terminus

Date: 12/24/2017 11:00am - 1:30pm Item: perfernt slab images ask about laundry room
 State: IA School: Iowa Assigned to: Nelson
 2/5/2017 8:00am - 12:00pm Install: Crow #2. Flexible is done but must be before 1/28 (Lentem 3 days advance)

Countertop Details:

Name	Phase	Room	Type	Material	Color	Soft Edge	Sink type	Sink Model	Sink in stock	Faucet info	Notes
Island	Kitchen		Grante	Island	Black	10	Substrate	Island	12545	yes	selected no mount
main counter	Kitchen		Grante	Island	Black	10	Substrate	Island	12545	yes	Signed off on slab image

Additional Notes at Template

Template Checklist

- ☐ Verify Accessibility to the job site.
- ☐ Meet & cabinet conditions.
- ☐ Measure materials & supports.
- ☐ Photographs of job site.
- ☐ Electrical outlet position.
- ☐ Refrigerator panel.
- ☐ Drawings are marked.

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

White space is just empty boxes

CopingSpace

Job Name: **Jerry Austin's Kitchen**
 Job Number: 10702014
 Account Name: Jerry Austin
 Contacts:

Job Address:
 Joe & Donna Austin
 1824 Spring St.
 Lawrence, IA
 Terminus

Date: 12/24/2017 11:00am - 1:30pm Item: perfernt slab images ask about laundry room
 State: IA School: Iowa Assigned to: Nelson
 2/5/2017 8:00am - 12:00pm Install: Crow #2. Flexible is done but must be before 1/28 (Lentem 3 days advance)

Countertop Details:

Name	Phase	Room	Type	Material	Color	Soft Edge	Sink type	Sink Model	Sink in stock	Faucet info	Notes
Island	Kitchen		Grante	Island	Black	10	Substrate	Island	12545	yes	selected no mount
main counter	Kitchen		Grante	Island	Black	10	Substrate	Island	12545	yes	Signed off on slab image

Additional Notes at Template

Template Checklist

- ☐ Verify Accessibility to the job site.
- ☐ Meet & cabinet conditions.
- ☐ Measure materials & supports.
- ☐ Photographs of job site.
- ☐ Electrical outlet position.
- ☐ Refrigerator panel.
- ☐ Drawings are marked.

Printable View

Additional Notes at Template

Template Checklist

- ☒ Verify Accessibility to the job site.
- ☒ Meet & cabinet conditions.
- ☒ Measure materials & supports.
- ☒ Photographs of job site.

Edit Form Template

Can Set Form to Print Landscape

COUNTERTOP INSTALLATION CHECKLIST		INSTALLATION CUSTOMER APPROVAL	
To be completed prior to installation:		Standard Job # SS3073	Customer Name Joe & Donna Austin
		Job Site Address 1824 Spring St. Houston, TX	
A. Did installer arrive within scheduled time frame?	<input type="checkbox"/>	I accept the materials and installation described in Installation Proposal # _____ as complete and satisfactory. Customer Signature _____ Date Completed _____	
B. Is material the correct color, quantity and style?	<input type="checkbox"/>		
C. Is material free of visual defects?	<input type="checkbox"/>		
D. Has Installer explained seam care and maintenance?	<input type="checkbox"/>		
To be completed after installation, yet prior to installer leaving:		Installer's Waiver and Release of Lien 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	
A. Was installation performed satisfactory?	<input type="checkbox"/>		
B. Was installation area left clean?	<input type="checkbox"/>		

Customize Paperwork for Customers

Certificate of Completion	
Job Name: Joey Austin's Kitchen	
Job Address: Joe & Donna Austin 1824 Spring St. Houston, TX	
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. This tells us that you (as the customer) are content with our work, materials and completion of the job. Please review the work that has been done before signing this agreement to ensure your satisfaction is met. We are sure that you will enjoy your stone product for many years to come. Thank you for your cooperation.	
Best Regards, Genesis Stone	
Clients Acceptance: Clients Name:	Installers Acceptance: Installers name:

Purpose #3 - Job Checklist

Job Summary			
CHECK ALL BOXES BEFORE FABRICATION!			
Deposit received: <input checked="" type="checkbox"/>	Tearout: Tearout - laminate	Change order needed:	
Final Total \$: \$5,300.00	Final quote approved: <input checked="" type="checkbox"/>	# Slabs Granite: 2	# Slabs Silestone:
Material Ordered: <input checked="" type="checkbox"/>	Material Received: <input type="checkbox"/>	Layout approved: <input type="checkbox"/>	

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

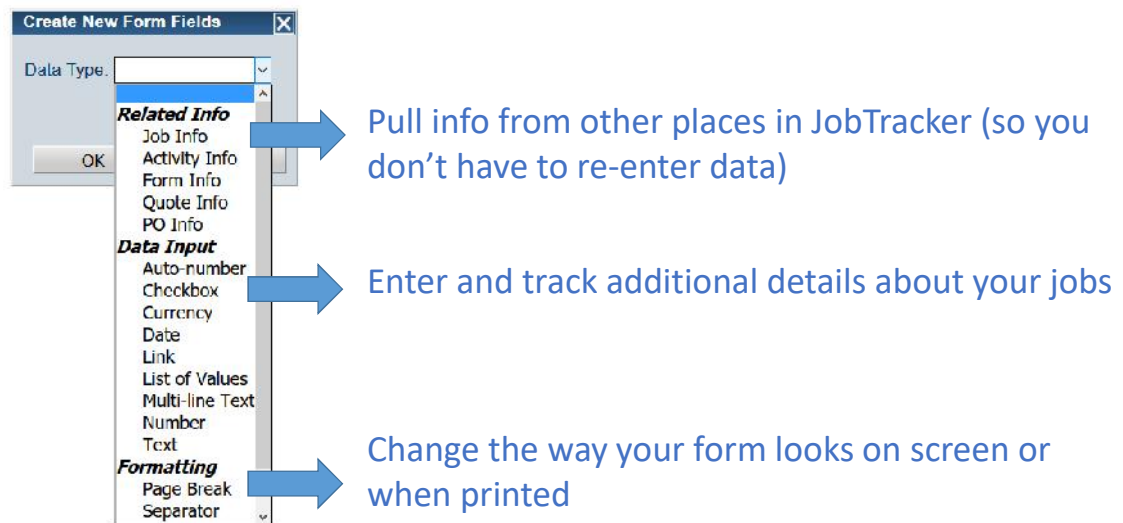
Job Name	Account	Job Creation	Template - Date	Fabrication - Date	Install - Date	Job Summary				Job Issues
						Deposit received	Material Ordered	Material Received	Layout approved	
212 Elm - unit 103	Acme Builders	1/19/2017	No Date	No Date	No Date					
292 Reserve A	Acme Builders	1/19/2017	No Date	No 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	2/5/2017 (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)	2/5/2017 (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)
Eddie's kitchen Acme Builders 8:00am - 2:00pm (6 hours) 100 Tearout - stone Katy, TX Incomplete install	Jeff Cotes Lowe's #620 8:00am - 12:30pm (4.5 hours) 72 Tearout - laminate Mesquite, TX 75187			Conner Dre Max Construction 8:00am - 3:00pm (7 hours) 50, 44, 78, 35 No Tearout Plano, TX 75094	Denise Turner ABC Builders, Inc. 8:00am - 12:00pm (4 hours) 78 No Tearout Irving, TX 75063
	Conner Dre Max Construction 1:00pm - 5:30pm (4.5 hours) 50, 44, 78, 35 No Tearout Plano, TX 75094				

Form Field Data Types



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 (Future 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

(I want fields blank to use Form Style)

Border: Inner Border: Label Position: Width: Alignment:

OK Cancel

You will delete the data stored in that field.

Duplicate a form

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help | CounterGo

Job Settings

Processes: All Sales Lead Job

Templates

Custom Fields

Forms

Form Sets

Activity Types

Activity Sets

Activity Custom Fields

Activity Statuses

File Custom Fields

Issue Categories

Issue Forms

Job Forms: New Form... Import Form... Assign Forms To Process...

Job Forms allow you to build custom forms such as a work order or an install check list. Job Forms printed from the Job Detail page or the Calendar page.

Form Template	Sequence *	Show on Calendar Printable View	Status
Job Summary	1	Yes	Active
Countertop Details	2	Yes	Active
Warranty Info		Yes	Active
Template Sign O		Yes	Active
Install Checklist		Yes	Active
Install Waiver		Yes	Active
Open POs		Yes	Active
Customer Certific		Yes	Active
Quality Check List	8	Yes	Active
Installation Customer Approval (H2)	10	No	Inactive

(Rows 1 to 10 of 10)

Context Menu:

- Edit Form 'Countertop Details'
- Duplicate Form Template...
- Re-Order Forms...
- Delete
- Export Form...

Edit a List of Values field

test details form

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

Click to add fields to the end of the form

Edit 'Material'...
 Edit list of values
 Delete
 Insert Field...

Account | Sales Lead | Job

Field List of Values

New Material... Delete...

Field Name: Material
 Form: test details form

Material	Color	Status
Corian	#ffdd00	Active
Granite	#aaaa00	Active
Silestone	#cccc00	Active

Create a new form

Account | Sales Lead | Job | Calendar | Report | Admin | Search

Job Settings

Processes: All Sales Lead Job

Templates

Custom Fields

Forms

Form Sets

Job Forms: New Form... Assign Forms...

Job Forms allow you to build custom forms such as a work order printed from the Job Detail page or the Calendar page.

Form Template	Sequence	Show on Calendar
Job Summary	1	Yes
Countertop Details	2	Yes

Account | Sales Lead | Job | Calendar | Report | Admin | Search

Job Form Template

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

Form Template Name: test

Processes: Job

Show on Calendar Printable

Expand On Job Detail Page

Create in (Entire Job) Phase: No

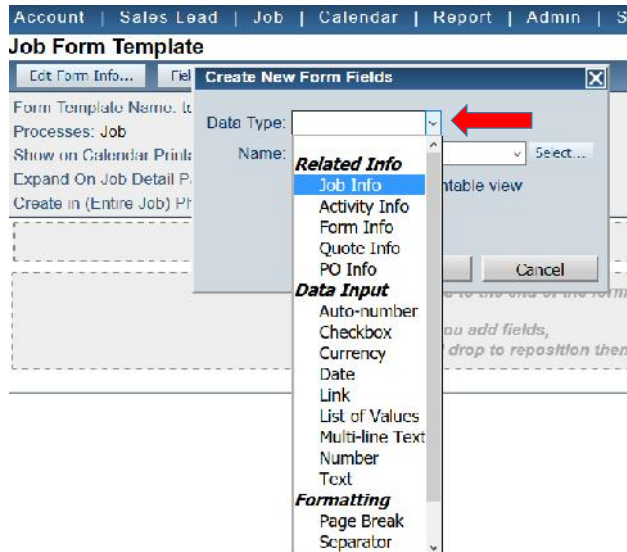
Edit Form Fields...
 Add Form Field...
 Delete Form Fields...

Click to edit header

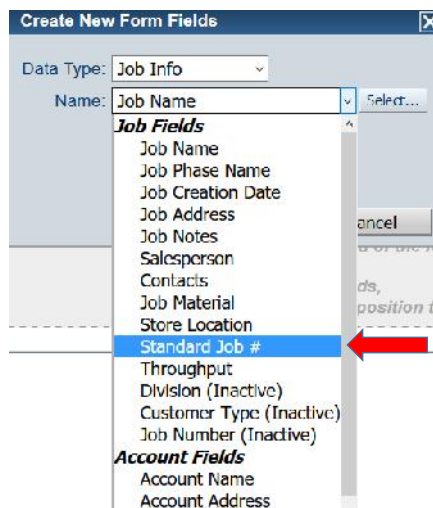
Click to add fields to the end of the form

After you add fields, you can drag and drop to reposition them

Pull in a field from the Job Details



Choose Data Type & get more options



Add more fields even before hitting OK

Account | Sales Lead | Job | Calendar | Report | Admin | Settings

Job Form Template

Fields: Form Info, Fields, Create New Form Fields

Form Template Name: Job Info
Processes: Job
Show on Calendar Print: ☐
Expand On Job Detail Print: ☐
Create in (Entire Job) Print: ☐

Data Type: Job Info (Delete)
Name: Standard Job # (Select...)
☐ Show only on printable view

Data Type: Activity Info (Delete)
☐ Show only on printable view
Activity Type: Install

Fields:

- ☒ Field
- ☐ Phase
- ☐ Status
- ☐ Date
- ☐ Sched. Time
- ☐ Assigned To
- ☐ Material
- ☐ Test field (inactive)
- ☐ Notes

(Rows 1 to 8 of 0)

Add Field... (Red arrow pointing to this button)

OK Cancel

Here I'm pulling in the Install details

Add more fields even before hitting OK

Account | Sales Lead | Job | Calendar | Report | Admin | Settings

Job Form Template

Fields: Form Info, Fields, Create New Form Fields

Form Template Name: Job Info
Processes: Job
Show on Calendar Print: ☐
Expand On Job Detail Print: ☐
Create in (Entire Job) Print: ☐

Data Type: Job Info (Delete)
Name: Standard Job # (Select...)
☐ Show only on printable view

Data Type: Activity Info (Delete)
☐ Show only on printable view
Activity Type: Install

Fields:

- ☒ Field
- ☐ Phase
- ☐ Status
- ☐ Date
- ☐ Sched. Time
- ☐ Assigned To
- ☐ Material
- ☐ Test field (inactive)
- ☐ Notes

(Rows 1 to 8 of 0)

Add Field... (Red arrow pointing to this button)

OK Cancel

Here I'm pulling in the Install details

Here's what we have so far...

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help | CounterGo |

Job Form Template

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

Form Template Name: test new form
 Processos: Job
 Show on Calendar Printable View: Yes
 Expand On Job Detail Page: Yes
 Create in (Entire Job) Phase: No

Click to edit header

Standard Job #:	Install:	Sched. Time	Assigned To	Notes
	Phase	Date		
	Data #1.1	Data #1.2	Data #1.3	Data #1.4
	Data #2.1	Data #2.2	Data #2.3	Data #2.4
				Data #1.5
				Data #2.5

Click to add fields to the end of the form

Adding a summary table from another form

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help | CounterGo |

Job Form Template

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

Form Template Name: test new form
 Processos: Job
 Show on Calendar Printable View: Yes
 Expand On Job Detail Page: Yes
 Create in (Entire Job) Phase: No

Click to edit header

Standard Job #:	Install:	Sched. Time	Assigned To	Notes
	Phase	Date		
	Data #1.1	Data #1.2	Data #1.3	Data #1.4
	Data #2.1	Data #2.2	Data #2.3	Data #2.4
				Data #1.5
				Data #2.5

Click to add fields to the end of the form

Create New Form Fields

Date Type: [v]
 Form: [v]
 Fields: [v]

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

OK Cancel

Select the fields you want from the other form

Create New Form Field

Data type: Form Info

☐ Show only on printable view

Form: Countertop Details

☒ Field

☐ Form Template

Fields:

- ☒ Name
- ☒ Phase
- ☒ Room type
- ☒ Material
- ☒ Color
- ☒ Sqft
- ☒ Edge
- ☐ Sink type
- ☐ Sink Model
- ☐ Sink in stock
- ☐ Faucet info
- ☒ Notes

(Rows 1 to 12 of 13)

Add Field...

OK Cancel

Now we've added 3 fields that pull information

Account | Sales Lead | Job | Calendar | Report | Admin | Search... | Help | CounterGo

Job Form Template

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

Form Template Name: test new form

Processes: Job

Show on Calendar Printable View: Yes

Expand On Job Detail Page: Yes

Create in (Entire Job) Phase: No

Click to edit header

Standard Job #:		Install:				
Phase	Date	Sched. Time	Assigned To	Notes		
Data #1.1	Data #1.2	Data #1.3	Data #1.4	Data #1.5		
Data #2.1	Data #2.2	Data #2.3	Data #2.4	Data #2.5		

Countertop Details:

Name	Phase	Room type	Material	Color	Sqft	Edge	Notes
Data #1.1	Data #1.2	Data #1.3	Data #1.4	Data #1.5	Data #1.6	Data #1.7	Data #1.8
Data #2.1	Data #2.2	Data #2.3	Data #2.4	Data #2.5	Data #2.6	Data #2.7	Data #2.8

Click to add fields to the end of the form

Here's the Printable View – added to Job

Standard Job #: S3300	Install:				
	Phase	Date	Sched. Time	Assigned To	Notes
	main house	5/17/2017	8:00am - 12:00pm		
	mother in law	6/8/2017	8:00am - 12:00pm		

Countertop Details:							
Name	Phase	Room type	Material	Color	Sqft	Edge	Notes
	main house	Kitchen	Granite	absolute black	50	Bevel	
	main house	Master bath	Granite	luna pearl	35	Bevel	
mother in law	mother in law	Kitchen	Granite	avacado	40	Bevel	
mother in law	mother in law	Bath	Granite	truquoise	23	Bullnose	



moraware

Contact us for with any follow up questions –
or simply to brainstorm solutions to your business problems.

support@moraware.com
1-866-312-9273

Moraware makes **CounterGo** estimating software and **JobTracker** scheduling software for countertop fabricators. Since 2002 Moraware has helped fabricators quote and schedule more than 2 million countertop installations. Moraware is a member of the MIS+BSI: The Natural Stone Institute, the International Surface Fabricators Association (ISFA), and the Stone Fabricators Alliance (SFA).

www.moraware.com