



Getting started

Opening the system and getting started

Thank you for using JobPro Central.

This trial version of JobPro Central is functionally identical to the production version, but will expire after approximately eight weeks of use. There are no restrictions to the amount of records you can create in each module. This way you can properly evaluate the software.

Getting Started...

Open the 'Home' file (or the 'JobPro Central' file if you are using the single-user runtime version).

On opening the single user version for Windows you may be asked to enter your username. Enter your full name here.

Login details:

If this is your first time to open the system and you have not yet been allocated a username and password then use the following details:

Username: Joe Bloggs

Password: jb

This temporary user is assigned to the Administrator group which has full access privileges. You will need to go to Home: Setup:Access Privileges to create more groups. The 'Access Privileges' button is located bottom right of any of the Setup screens. By default there is an 'Administrator' access group. This group has full privileges throughout the system. This group cannot be deleted or modified.

To create a new group click the 'Create new group' button on the Setup:Access Privileges screen. You will need to specify the name for the new group. Once the group has been created you will then need to specify/tick the access privileges you want to assign to this group. Clicking through the various tab buttons on the Setup:Access Privileges screen will allow you to tick the relevant privileges you want to assign to the group. There is a button on the 'General' tab to "Tick all privileges for this group". This will save you having to tab through all access screens ticking every option. You can click this button and then untick the relevant options you do not want to allocate to the currently selected group.

When the groups are setup you will need to create a record for each employee and assign each a password and allocate them to a group. This is done in the Contacts file. You do not have to set up all groups and employees straight away. You can add more at a later stage if required.

To create a new employee record click the 'Contacts' button on the Home screen, click the 'New' button in the menu bar, change the "Contact" label to "Employee" and enter the employee's name directly below the label. Click the 'Access' tab to specify access privilege details like password and group for that employee. That's all you need to do for each employee at this stage. At least one employee must be assigned to the 'Administrator' access group so that the system can be properly configured.

If you wish to properly configure the rest of the system then click the 'Setup' button on the Home screen. Here there is a setup screen for each module in the system. For more details on how to set up the system see the help topics under the category 'Setup and preferences'.

Alternatively you can go straight into using the modules and setup the system later if preferred.

Note: See sections on 'Setup and Preferences' in the online Help guide for details on setting up and configuring this system.

WARNING: Do NOT rename any of the files. Otherwise the program will not function correctly.



Getting started

Trial version - how to purchase

For information on how to purchase this product, please visit our web site at www.jobprocentral.com or send us an e-mail to sales@jobprocentral.com



Getting started

System overview (from the Home screen)



System overview...

Setup:

The Setup button takes you to the setup screens for the system where you can specify preferences for each module.

Info/Help:

This module is mainly for helping you get the system set up and started. It guides you through all the various setup screens.

Prospects:

The Prospects module is used to keep track of all enquiries or prospects that you have. You can assign tasks and create quotations specific to an enquiry. You can automatically turn a prospect into a customer at the click of a button where all their details get carried over to a new record in the Contacts module. Tasks created for an enquiry are linked to the Tasks module and can be viewed in the Calendar module as well.

Contacts:

Everybody you deal with gets entered into the Contacts module except for prospects. Depending on the type of contact - either customer/client, supplier/vendor, employee, or just a contact - there are various tabbed screens specific to that type of record. The Contacts module links to just about every other module in the system some way or another. Clicking on the Options button displays various options for a record like create quotation, job, sales order, purchase order, sales invoice, dispatch, email, letter, fax, mailshot, etc.

Mail & Fax:

This module is used to generate letters, emails and faxes. From most modules you can create a letter, email or fax for the relevant company/contact on the screen. In the Prospects and Contacts modules there is an option to generate a mailshot that uses the 'Mail & Fax' module to generate the mailshot.

Jobs/Projects:

The Jobs/Projects module contains all the information regarding jobs or projects. Job screens include general details, stages, mail/fax correspondence, budgets, costs, sales, tasks, time and assembly details. The Jobs/Projects module is also linked to various other modules in the system.



Getting started

System overview (from the Home screen)

Tasks:

This module is used to store all on going or once-off tasks. Tasks do not have to be specific to any prospect, company, or job. They can be just relevant to an employee or multiple employees for example. The Tasks module is linked to various modules including Prospects, Contacts, Jobs/Projects and Calendar.

Calendar:

The Calendar module is used to display jobs, stages and tasks using a calendar style interface. You can filter out tasks by status and responsible, create records, print lists, click items to view full details, etc.

TimeLog:

The TimeLog module is essentially a daily time sheet for employees. An employee will log in and enter their time details for the day. There are various reporting options on the Options screen. If job numbers are entered for time entries these time entries will be displayed on the TimeLog screen in the Jobs module for those jobs.

Time details can also be entered directly on a job from the Time screen in the Jobs module.

Stock/Services:

All your inventory/stock, whether raw material, finished goods or services, go into this module. You can keep track of stock quantities and values for raw material and finished products. Screens include general details, costings for the breakdown of a product/service, stock takes or amendments to quantities, purchases for the product/service, sales for the product/service and job costs for the product/service.

Quotations:

Generate estimates, proposals or quotations from this module. This module is linked to the Stock/Services, Prospect, Jobs/Projects and Contacts modules. Details for a quotation can be entered on a line by line basis or on a textual basis. Records can be duplicated, amended, turned into a sales order, sales invoice or a purchase order with the click of a button. There are various reporting options on the Options screen. Quotations can be printed, faxed or emailed in a foreign currency.

Sales Orders:

Generate sales orders from this module. This module is linked to the Stock/Services, Jobs/Projects and Contacts modules. Details for a sales order can be entered on a line by line basis or on a textual basis. Sales orders can be turned into sales invoices, purchase orders or dispatch dockets with the click of a button. There are various reporting options on the Options screen. Sales orders are typically only used where you need the customer to sign a sales order so you can go ahead with a job or invoice. Also, some companies do not do their invoicing from this system but from their accounts package, so they will create a sales order and this can be given to their accounts department to create the invoice in their accounts package. Sales orders can be printed, faxed or emailed in a foreign currency.

Purchases:

Generate purchase orders from this module for suppliers. This module is linked to the Stock/Services, Jobs/Projects and Contacts modules. Details for a purchase order can be entered on a line by line basis or on a textual basis. There are various reporting options on the Options screen. Purchase orders can be printed, faxed or emailed in a foreign currency.

Shipping/Dispatches:

Generate dispatch dockets and track deliveries from this module. This module is linked to the Stock/Services, Jobs/Projects and Contacts modules. Details for a dispatch record can be entered on a line by line basis or on a textual basis. Records can be turned into sales invoices with the click of a button. There are various reporting options on the Options screen.

Sales Invoices:

Generate sales invoices from this module. This module is linked to the Stock/Services, Jobs/Projects and Contacts modules. Sales invoices can be entered on a line by line basis or on a textual basis. Sales invoices can be turned into dispatch records with the click of a button. There are various reporting options on the Options screen. Sales invoices can be printed, faxed or emailed in a foreign currency.



Getting started

System overview (from the Home screen)



Opening JobPro

Setting a default username for login.

Automatically login as user: To specify yourself or another employee as the default username when opening the system, go to the Contacts module, find the relevant employee record, click the 'Access' tab and tick the 'Set user as default login' tickbox.

This saves time specifying the username every time the system is opened. Particularly suitable for a single user environment.

Note: If the username that is specified in the FileMaker Pro application preferences matches an employee name then this name will be used as a default for login.



Miscellaneous

Hosting files on Mac OSX - Setting Ownership & Permissions

File Permissions with Mac OS X. FileMaker Server runs as a daemon on Mac OS X. Because of the built-in security provided by UNIX, the underlying operating system on the Mac, you will need to set permissions on groups and database files particular to FileMaker Server.

Click on the JobPro Central folder that contains the database files. Select 'Get info' from the File menu. In the 'Ownership & Permissions' section do the following:

- Click the 'lock' button (small round button with lock icon) to allow changes
- Set the Owner Access to: Read & Write
- Set Group to: fmsadmin
- Set Group Access to: Read & Write
- Click button 'Apply to enclosed items'
- Click the 'lock' button to lock changes being made

For more information, see the FileMaker Server Administrator's Guide.
