



Getting started

License agreement

License Agreement and Limited Warranty

IMPORTANT - READ CAREFULLY BEFORE INSTALLING

IF TRIAL VERSION

If this is the trial version of JobPro Central it is functionally identical to the production version, but will expire after approximately 60 days of use. Open the 'Home' file (or the 'Open JobPro' file if you downloaded the single-user runtime version) and enter the password '**jobpro demo**' when prompted.

For information on how to purchase the full version, please visit our web site at <http://www.jobprocentral.com> or send an e-mail to sales@jobprocentral.com

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Getting started

License agreement

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Getting started

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Getting started

Trial version - getting started

Thank you for taking the time to evaluate 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 is done so you can properly evaluate the software.

We recommend properly using the software, as opposed to creating dummy records, because if you purchase JobPro Central the trial version will convert automatically to the full version by simply entering an unlock code.

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

Getting Started...

Open the 'Home' file (or the 'Open JobPro' file if you downloaded the single-user runtime version) and enter the password 'jobpro demo' when prompted.

You will be taken to the Home menu first. If you wish to properly set up the system click the 'Setup' button. 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 to using the modules and setup the system later if required.

Before logging into the 'TimeLog' file you will need to create at least one employee in the 'Contacts' file. To do this 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. That's all you need to do for now. Next click the 'Home' button (located top right in the menu bar) and then the 'TimeLog' button to login to the timesheets screen.

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

How to purchase JobPro Central...

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

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Getting started

Trial version - how to purchase

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Getting started

System overview - from the Home screen.



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 and time details. So the Jobs/Projects module is also linked to various other modules in the system.

Tasks:

This module is used to store all on going on/off tasks. Tasks do not have to be specific to any prospect, company, or



Getting started

System overview - from the Home screen.

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 tasks using a calendar style interface. You can filter out tasks by status and responsible, create tasks, print task lists, click tasks to view full details in Tasks module, etc.

TimeLog:

The TimeLog module is basically 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.

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.

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.



Miscellaneous

Do not change file names

WARNING: Do NOT rename any of the database file names. Otherwise the program will not function correctly. However, the system will give a warning on startup if file names have been changed.



Miscellaneous

Backing up the system

It is important to set up a regular backup procedure that includes backing up this system and its data to an external media source stored in a safe place. Failure to do this can result in the loss of information that could have serious impacts to your business. The developers of this system are not responsible for any loss of data while using the software.

There are various options for setting up automatic backup procedures. Contact your computer or network supplier for more information.



Opening JobPro

Opening JobPro: Single user version

Open the 'Home' file (or the 'Open JobPro' file if you are using the single-user runtime version) and enter the password you have been assigned when prompted.

If you are using the trial version use the password 'jobpro demo'.

Enter the admin level password if you need to set up and configure the system or have full access to the system.

On opening the system you will be taken to the Home menu. If you wish to set up the system click the 'Setup' button. Here there is a setup screen for each module in the system. See separate help topics for each module in the system.



Opening JobPro

Opening JobPro as a guest over the network

Open FileMaker Pro, click the HOSTS button and select HOME from the menu that appears.

If you are using the trial version use the password 'jobpro demo' otherwise use the password that you have been assigned.

On opening the system you will be taken to the Home menu. If you wish to set up the system click the 'Setup' button. Here there is a setup screen for each module in the system. See separate help topics for each module in the system.



Opening JobPro

Logging into the Timesheets module

Before logging into the 'TimeLog' file there needs to be at least one employee in the 'Contacts' file.

To create a new employee 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. That's all you need to do initially. Next click the 'Home' button (located top right in the menu bar) and then the 'TimeLog' button to login to the timesheets screen.



Opening JobPro

Opening JobPro: Trial version

Open the 'Home' file (or the 'Open JobPro' file if you are using the single-user runtime version) and enter the password 'jobpro demo'.

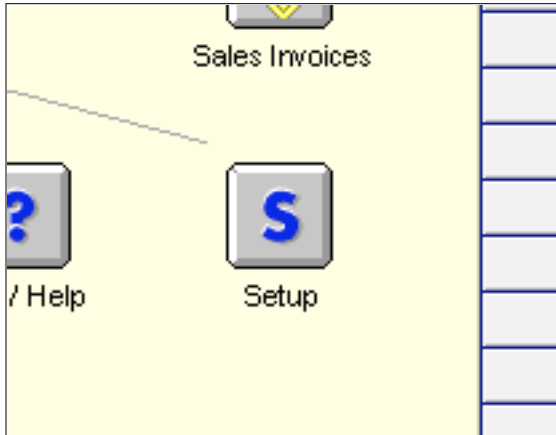
This will allow you to set up and configure the system or have full access to the system for trial purposes.

On opening the system you will be taken to the Home menu. If you wish to set up the system click the 'Setup' button. Here there is a setup screen for each module in the system. See separate help topics for each module in the system.



Setup and preferences

Setting up JobPro...



Open the 'Home' file (or the 'Open JobPro' file if you are using the single-user runtime version) and enter the admin level password when prompted. If you are using the trial version use the password 'jobpro demo'.

On opening the system you will be taken to the Home menu. If you wish to set up the system click the 'Setup' button. Here there is a setup screen for each module in the system. See separate help topics for each module in the system.

Alternatively you can go straight to using the modules and setup the system later if required.
