



SETUP GUIDE

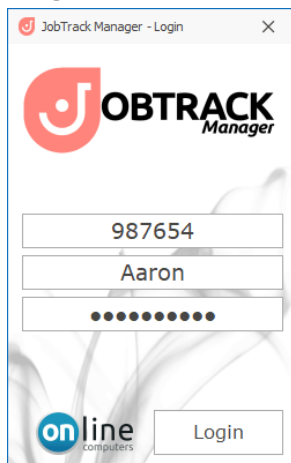
ONLINE COMPUTERS LTD

Introduction

This is a basic guide for setting up your JobTrack solution using the setup tools built in to the JobTrack Manager. If you have any questions, please do not hesitate contact Online Computers.

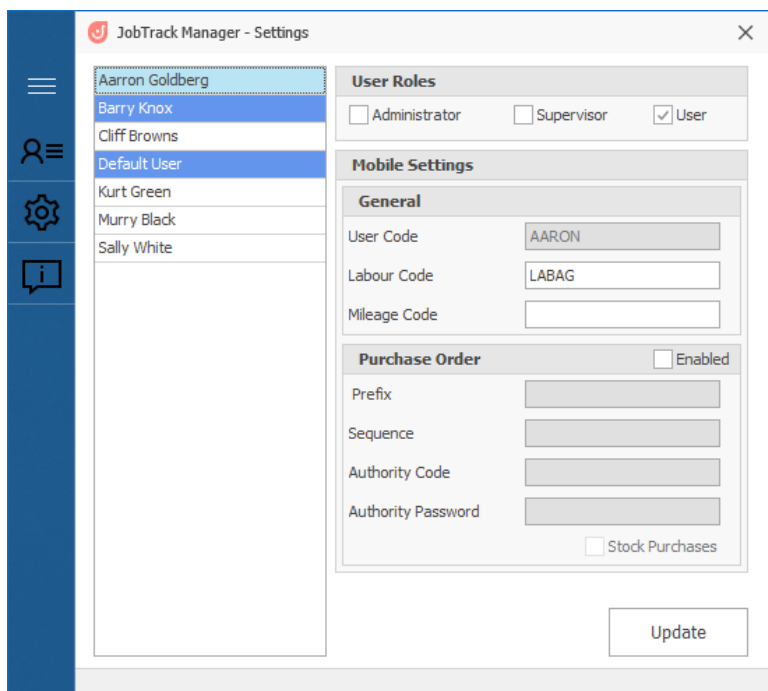
This document does assume that you have already registered for Jobtrack with Online Computers and Online's Accredo WebService tools have already been provisioned and configured on your server.

Login



Enter the company pin provided
Your Accredo username and password

Settings menu



This is where you will setup users

On the right will be a list of users from Accredo, they will be highlighted blue if they have been already setup in JobTrack Manager

Select who you want to setup for the JobTrack Manager and Mobile app

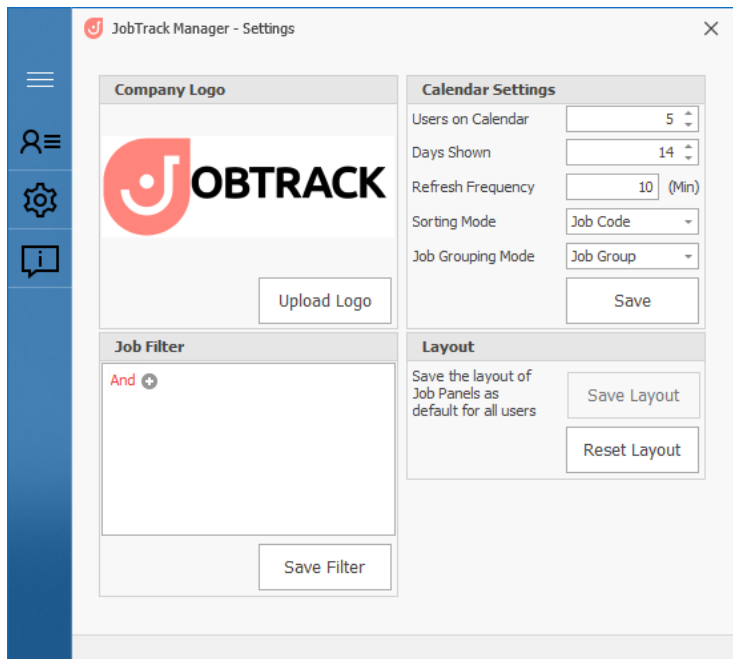
Select which roles they should have

- Administrator
 - Can access the Settings menu of JobTrack Manager
- Supervisor
 - Supervisor can login to JobTrack Manager and schedule jobs
- User
 - Can see and enter time for scheduled jobs in the mobile app

The Mobile Settings are specifically for the mobile app and do not affect the manager

- Labour Code
 - Must be unique
 - Must be already configured in Accredo
 - Used for entering time into Accredo
- Mileage Code
 - This must match a product code in Accredo for entering travel costs
- Prefix
 - Used as a unique prefix for purchase order codes made in the mobile app
 - Recommended length of 2-3 letters
- Sequence
 - Numeric code that purchase order codes will start at
 - Recommended length of 4-6 numbers
- Authority
 - The Authority Code and Password in Accredo for making purchase orders by this user
- Stock Purchases
 - Allows the user to make non job stock purchases

Program Settings



- Company Logo
 - Here you can upload a company logo that will be used in reports and in the mobile app
 - Note keep the image small, less than 25kb to ensure loading still happens quickly
- Job Filter
 - Add filters that can limit what jobs are shown in panels. i.e. only show jobs where the Job Code begins with 'N', or jobs that are non WIP
- Users on Calendar
 - Sets how many people shown vertically on the calendar
- Days Shown
 - Sets how many days are visible horizontally on the calendar
- Refresh Frequency
 - Sets the interval in minutes for automatically refreshing data
 - this does not enable or disable automatic refreshing
- Sorting Mode
 - Sorts jobs by the specified parameter, options are: Job Code, Job Name, Customer Name, and Date Required
- Job Grouping Mode
 - Groups jobs in panels together, options are: Department, Branch, and Job Group

You can also save the layout of job panels or reset it back to the default. This will be a default for all users of the program, they can create and save their own layout which will be used for them instead.

Note

Special jobs in Accredo such as "Annual Leave" must have the Category 2 set as "NC" as shown below

JC Job Maintenance - LEAVE - Annual leave

Select Job: LEAVE Annual leave

Job Description Information Address Estimate Documents Links Memos Balances Graph Transactions

Job Code	LEAVE	
Job Name	Annual leave	
Customer Code		
Contact		Email Contact <input type="checkbox"/>
Job Type	Normal	Related Job Code
Order No		Comment
Sales Person	0000	Currency Code
Price Code	NZWSALE	Date Valued
Discount Code	0	Rate Type
Date Entered	30/09/2017	Exchange Rate
Date Required		Job Group Code
Date Completed		Job Category
Job Status	Active	Category 2
% Complete		Branch
Non WIP	<input type="checkbox"/>	Department
Inactive	<input type="checkbox"/>	Default Location

NC

AKL

ADM

AKL

Job Summary

Source Cost WIP Sell NZD Profit Margin Sell NZD