Getting started

Opening the system and getting started

Thank you for using JobPro Central.

If you are using the trial version of JobPro Central it is functionally identical to the production version, but will expire after 30 days 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.

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

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

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 left of the Setup screen. 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 '+' 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 would like 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. There is a button on the 'General' tab to "Turn on 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 username/password and assign them to a group. This is done in the Contacts module. 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 in the top modules menu, click the 'New' button in the menu bar and click the "Employee" checkbox. Fill in all the relevant contact details. Click the 'User prefs' tab to specify access privilege details like the username, password and access 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: Do not set your computer to sleep if you will have the JobPro system open over the network otherwise it will lose connection to the Server and this is not ideal for the databases on the server as it is possible to damage a database.

IMPORTING DATA: If you plan on importing data in JobPro there is a folder within the supplied JobPro Central folder call "Import Files". Within this folder there are 3 spreadsheets that can be used for importing. Products/Services, Enquiries & Companies/Contacts. You will need to keep the contents of this folder if you plan on using the spreadsheets.

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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

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Install JobPro (Multi user version using FileMaker Server)

Put the JobPro Central folder (uncompressed) onto the desktop of the machine hosting FileMaker Server.

Open FileMaker Server Admin Console (see above for further details).

On the left hand panel ensure administration is selected. In the bottom left you will see "Related Tasks" - choose the first option in the list - "Upload a Database".

The "Upload Database Assistant" launches. If you would like to store the JobPro database in the default location suggested by FileMaker Server click on the "Databases" folder. Now click on "Add Database".

You now need to browse to your JobPro Central folder that you previously saved (uncompressed) onto the server. Within this folder highlight the file called "JobPro". Then click 'select'. You are now back in the "Upload Database Assistant" where you need to click on "Next". Follow the assistant through the subsequent steps and allow the upload to complete. Click on "Finish" to exit upon completion.

Your database should now show under the "Databases" folder with the status "Normal". If your database is showing status "Closed", select the database, right click on the database file and then choose "Open". This will then set the status of your database to "Normal".

Notes:

The default location set by Filemaker Server to host your database file is:

Windows server:
C:\Program files\FileMaker\FileMaker Server\Data\Databases

Mac OSX server:
Library:FileMaker Server:Data:Databases

We do not recommend manually placing JobPro files directly to this location as the resulting folder structure is not created properly. You must use the "Upload database" method mentioned above.

What happens when you upload the database is that Filemaker server copies the JobPro file to the specified "Databases" location. It also creates a folder called "RC_Data_FMS". Inside this folder is a folder called "JobPro". Within this "JobPro" folder there is a "Files" folder created. Contained within the "Files" folder are sub folders storing images and documents required by JobPro as well as documents added by users in the Documents module.

All documents and images inserted into JobPro in the Documents module will be stored in:

Windows Server with defaults selected:
C:\Program files\FileMaker\FileMaker Server\Data\Databases\RC_Data_FMS\JobPro\Files\Documents

Mac OSX server with defaults selected:
Library:FileMaker Server:Data:Databases:RC_Data_FMS\JobPro\Files\Documents

IMPORTANT OSX Server: After installing FileMaker Server you may need to reset the ownership and permissions for the 'Data' folder located Library:FileMaker Server:Data so it is not set to read only. The 'Databases' folder may need to be done as well.

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Install JobPro (Multi user version using FileMaker Pro)

These instructions are relevant to sharing JobPro where you are NOT using FileMaker Server but instead using FileMaker Pro on a user's computer - also referred to as "peer to peer sharing". To host JobPro so other users can access it as clients, you will designate one of the computers/users as the host computer and the others will access the host computer as a guest working on a peer to peer network. If networked, all computers can access the same files at the same time.

'FileMaker Sharing' needs to be turned on within the FileMaker Pro application on the host computer. To do this open up FileMaker Pro (leave JobPro closed) and in the File menu select 'Sharing' and then 'FileMaker Network'. Make sure 'Network sharing' is turned on. If this is not the case then you will get an error on opening JobPro that the files cannot be shared.

The JobPro folder needs to be located on the host computer. JobPro needs to be open on the host computer for other users to open the system as a guest.

Once JobPro is open on the host computer each user opens FileMaker Pro on their own computer and they can either select 'Open Remote' from the File menu or click on the 'Remote' button in the 'Open File' dialog box. This will then search the network and display the name of the host computer. Clicking on the host computer name will display the file called 'Home' and the user can then double click this file to open JobPro.

It is important that the JobPro database remains in the JobPro Central folder that was supplied as there are sub folders in this folder that the JobPro database relies on, specifically the "Files" folder that contains any images and documents used in JobPro.

IMPORTANT: Remember to backup the JobPro Central folder regularly but if you are not using FileMaker Server you will need to close JobPro first otherwise the backup will be happening on an in use database and that is not recommended.

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Install JobPro (Single user version)

To use JobPro as a single user installation on your local machine place the uncompressed JobPro folder in the location of your choice. We do not recommend you place your JobPro folder on your desktop. Also, when choosing the location of your JobPro folder please bear in mind any backup procedures that may be running on your machine. Our customers are solely responsible for their own data. The JobPro folder contains the main JobPro file as well as a 'Files' folder that stores any images and documents used in JobPro. Do not remove the JobPro database from this folder as it will break links to the 'Files' folder.

IMPORTANT: Remember to backup the JobPro Central folder regularly but you will need to close JobPro first otherwise the backup will be happening on an in use database and that is not recommended.

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Import options

Import data from pre populated spreadsheets.

▸ **Enquiries / leads:** Import data into the Enquiries module

▸ **Contacts / Companies:** Import data into the Contacts and Companies modules

▸ **Products / Services:** Import data into the Products / Services module

Instructions:

1) It is important that you read any comments in the relevant spreadsheets as specific details for certain columns are given there.

2) Populate and save the relevant spreadsheets prior to importing.

3) Do not change the order of the columns in the spreadsheets as that will cause data to be imported into the incorrect fields in this system.

4) Backup this database prior to import.

5) Choose an option above to import data from the relevant spreadsheet.

Notes:

Please contact technical support if you do not already have the relevant spreadsheets.

If you are importing or entering data in the trial version (downloaded online) that you wish to keep if you purchase the system then let us know as we can email you a link to another version of the trial as the version online is locked out for security reasons.

If you have requirements for data importing that are not covered by these import options then please contact us for further options so you do not have to manually enter data into the system.

Cancel

It is possible to import records into the following modules;

Products
Contacts
Enquiries

Your JobPro installation came with a folder called "Import Files". If you have deployed JobPro via FileMaker Server the folder will not have been copied to your database location on the server. Per the installation instructions you should have this folder in a location of your choice. If you have a single user installation scenario the folder will exist at the same location as your JobPro database file.

Within the "Import Files" folder you will have 3 importation templates. These are excel based templates that contain the correct schema to facilitate importation into your JobPro database. It is very important not to change any column headings in any of the templates as they will not function. We will go through each of them in turn in this document.

The Products Importation Template

Listed below is a description of each field in the template and any notes we feel are relevant.

Product Code
A product code must be entered if codes are normally manually entered in new records in the Products module. A setting in setup:products allows you to specify this. If a product code already exists in the database that also exists in your import file

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the import will be aborted with no records having been imported.

Enter a product code if you do not wish the system to generate a serial number on import for the product code. If left blank the system will use the next available number during import. If left blank it is possible to created duplicate products in the database albeit with different product codes.

Name
The name of your product or short name for your product.

Description
The details of your product.

Type
Is the product a finished product, service product or raw material. You can edit what is in the product type list in setup:Lists & Menus:Product Type. If you have a value in your import file that does not exist in the list the import will still place your specified value in the field.

Cost Price
The cost price for your stock item.

Sell Price
The net of tax sales price for your item.

For each item you can input a sell price OR a markup. If you enter both then the sell price will be ignored.

Markup
For each item you can input a sell price OR markup. If you enter both then the sell price will be ignored. Enter markup with a full number. E.G. 20 for 20%.

Purchase Tax Code
If you are planning to export data into an external accounting package, such as Quickbooks or SAGE, you should specify the correct purchase tax code for your stock item here. It is best to specify these in the system before import at setup:Lists & Menus:Accounts - Purchase Tax. These should match codes setup in your accounting system.

Sales Tax Code
If you are planning to export data into an external accounting package, such as Quickbooks or SAGE, you should specify the correct sales tax code for your stock item here. It is best to specify these in the system before import at setup:Lists & Menus: Accounts - Sales Tax. These should match codes setup in your accounting system.

Purchase Nominal Code
If you are planning to export data into an external accounting package, such as Quickbooks or SAGE, you should specify the nominal account under which you would normally track purchases for this item. These can be specified at setup:Lists & Menus:Accounts - Nominal Codes. These should match codes setup in your accounting system.

Sales Nominal Code
If you are planning to export data into an external accounting package, such as Quickbooks or SAGE, you should specify the nominal account under which you would normally track Sales for this item. These can be specified at setup:Lists & Menus: Accounts - Nominal Codes. These should match codes setup in your accounting system.

Category Code
Enter the category code in here, not the full category name as that is entered in setup:Lists & Menu's: Category.

Manufacturer
Enter the name of the stock items manufacturer here. This does not relate to the supplier of the item.

Manufacturer Part No.
Enter the manufacturer's part. no. here even it if is the same as the product code used.

Manufacturer Model No.
If the manufacturers model no. differs from it part no. you can enter it here.

Not all fields are mandatory in this import file.

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The Contacts Importation Template

Company Name
Enter the company name here.

Customer
If the company is a customer then enter 1 in this field.

Supplier
If the company is a supplier then enter 1 in this field. A company can be both a customer and a supplier.

Company Type
The list of company types can be edited at setup:Lists & Menus:Company Type. If your import contains a value that is not in the Company Type list it will still be imported to your database.

Company Category
The list of company categories can be edited at setup:Lists & Menus:Business Category. If your import contains a value that is not in the Business Cateogry list it will still be imported to your database.

No. of Staff
An optional field.

Company Address Line 1
The address of the company you are entering.

Address Line 2
The address of the company you are entering.

Address Line 3
The address of the company you are entering.

Town/City
The town or city of the company you are entering.

County/State
The county or state of the company you are entering.

Zip/Post Code
The Zip or Post code of the company you are entering.

Country
The Country of the company you are entering.

Company Phone
The company main phone number.

Company Fax
The company main fax number.

Company Email
The company main email address.

Website
Company website.

Title
If desired enter a persons salutation here such as Mr.,Mrs, Dr. etc.

First Name
Enter a persons first name who is related to the company.

Last Name
Enter a persons last name who is related to the company.

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Customer
If the contact is a customer in their own right then enter 1 in this column. If they are just a contact linked to a company that is the customer then do not enter anything in this column.

Contact Type
If required there is a drop down list in JobPro at setup:Lists & Menus:Contact Type that allows you to customize the type of contact this is to your business and the associated company record. Anything entered in here not in your setup will still appear correctly in the record after importation.

Direct Dial Phone
Enter your company contacts direct dial number here.

Direct Dial Fax
Enter your company contacts direct dial fax number here.

Mobile / Cell Phone
Enter your company contacts mobile number here.

Home Phone
Enter your company contacts home phone number here if applicable.

Contact Email
Enter the contact email address here.

Position
Enter the contacts position within the company. In JobPro under setup:Lists & Menus:Position you can amend the list of accepted positions for your database. If you import file contains something that is not in your setup list it will still import.

Department
Enter the department in which your contact works within the company. In JobPro under setup:Lists & Menus:Department you can amend the list of accepted departments for your database. If you import file contains something that is not in your setup list it will still import.

Ext. No.
Enter the phone extension number of your company contact here.

Contact Address Line 1
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

Address Line 2
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

Address Line 3
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

Town/City
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

County/state
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

Zip/post code
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

Country
If there is a company and address entered on the line and this contact is located at the same address then leave this address blank.

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The Enquiries Importation Template

Title
If desired enter a persons salutation here such as Mr.,Mrs, Dr. etc.

First Name
Enter a persons first name who is related to the company.

Last Name
Enter a persons last name who is related to the company.

Position
Enter the contacts position within the company. In JobPro under setup:Lists & Menus:Position you can amend the list of accepted positions for your database. If you import file contains something that is not in your setup list it will still import.

Company Name
Enter the company name that the enquiry is related to here. Please note this will not created a company record for your enquiry it serves merely as a place holder for the company name related to the enquiry. It is possible at a later stage to create a company record from the enquiry record.

Department
Enter the department in which your contact works within the company. In JobPro under setup:Lists & Menus:Department you can amend the list of accepted departments for your database. If you import file contains something that is not in your setup list it will still import.

Address Line 1
The address of the company you are entering the enquiry for.

Address Line 2
The address of the company you are entering the enquiry for.

Address Line 3
The address of the company you are entering the enquiry for.

Town/City
Enter the town/city of the company you are entering the enquiry for.

County/State
Enter the county/state of the company you are entering the enquiry for.

Zip/Post Code
Enter the zip/post code of the company you are entering the enquiry for.

Country
Enter the country of the company you are entering the enquiry for.

Company Phone
The company main phone number.

Company Fax
The company main fax number.

Company Email
The company main email address.

Website
The company web site url.

Direct Dial Phone
Enter the enquiry contact direct dial number here.

Direct Dial Fax
Enter the enquiry contact direct dial fax number here.

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Mobile / Cell Phone
Enter the enquiry contact mobile number here.

Home Phone
Enter the enquiry contact home phone number here if applicable.

Contact Email
Enter the contact email address here.

Type
The list of contact types can be edited at setup:Lists & Menus:Contact Type. If your import contains a value that is not in the Contact Type list it will still be imported to your database.

Category
The list of company categories can be edited at setup:Lists & Menus:Business Category. If your import contains a value that is not in the Business Cateogry list it will still be imported to your database.

Enquiry Value
Enter the value of the current enquiry here.

No. Of Staff
An optional field.

Referred By
Enter here how this enquiry came to you. I.E. via Google, phone book etc. The list of values can be edited at setup:Lists & Menus:Referred by. If your import contains a value that is not in the referred by list it will still be imported to your database.