# JobPro2Go - Setup & User Guide

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## About JobPro2Go

JobPro2Go is an optional mobile app for the job management system JobPro Central (http://www.jobprocentral.com) that allows offline remote users the ability to log time, costs/expenses/parts, notes and documents (inc signatures) against jobs on an iPhone or iPad and then sync those back to JobPro on the main server.

This purpose of this trial version is to allow you to try out the functionality on an iPhone or iPad. This trial does not include syncing with the main JobPro database as that usually involves setting up JobPro on a server. Please contact us if you would like to test that functionality as well:

Email: sales@jobprocentral.com

Web: http://www.jobprocentral.com/contact.html

Tel: +353 53 9484683


## Getting started

Install FileMaker Go on the iOS device (iPhone or iPad)

Each user that will be using the JobPro2Go database needs to install the free FileMaker Go application from Apple's iStore. Go to the following URL and there will be links to the App Store for both iPhone and iPad versions: http://www.filemaker.com/products/filemaker-go/

Once the FileMaker Go app has been installed on your iOS device the next step is the add the 'JobPro2Go' file to the device so that it can be opened. There are two options here. Select any location on your computer to save the file to and once the file is saved you can then deploy the file to the relevant mobile user by either of the following methods:

1) Email the 'JobPro2Go' file to an email address that you use specifically on the iOS device. You can then add the attachment to your FileMaker Go app on your device. Do not compress the file when emailing. Just email the file as is.

2) The second option is where you can add the 'JobPro2Go' file to the iOS device on the 'Apps' tab from within iTunes on your computer. Connect the iOS device to your computer, open iTunes, select the device name under 'Devices' and click on 'Apps'. In the Apps list select 'FileMaker Go' and then either click 'Add' or drag the JobPro2Go file into the 'FileMaker Go Documents' portal.


**Adding a 'JobPro2Go' application icon to your iPhone or iPad (optional):**

Download the following zip file to a computer where you can unzip the file revealing a file called 'jobpro2go.mobileconfig': (Safari 6.0 users please note you should turn off the setting in preferences under the general tab that is "Open Safe" files after downloading, otherwise your OS will try and install the profile on your machine.)

http://www.jobprocentral.com/downloads/jobpro2goicon.zip

Extract the 'jobpro2go.mobileconfig' file to your computer first. This is normally done by double clicking the zipped file and you will see it extracts the unzipped file to the same location. This file can then be

emailed to your email account on the iOS device where you can tap the attachment within the email to invoke the 'Install Profile' utility. On that screen you should press 'Install' and this will add a 'JobPro2Go' icon to your app menu.

## General use

There are two options to open the JobPro2Go app on your iPhone or iPad:

1) If you have installed the JobPro2Go app icon then click on the icon in your app menu.

2) To launch JobPro2Go open the FileMaker Go app on your iPhone or iPad, click on 'Open File Browser', then click 'Files on Device' and then on the 'JobPro2Go' icon.

As this is a trial version you do not need to enter in a username and password.

This offline mobile app is very much focused on jobs so adding timelogs, expenses, documents or notes is done from the job record itself. On the Home screen click Jobs to view some sample jobs. Pull up the relevant job by tapping on it in the job list and from there you can create or view timelogs, expenses, documents or notes for that job by tapping on the relevant button on that screen.

On the Home screen the relevant number of records will display beside each module button name so you will know if there are any records to be synced up to the server.

Each module has a list screen and a full screen. You can perform a search on either screen using the 'QuickFind' option in the Records menu (magnifying glass icon) down the bottom right of the screen. You can also browse through records on the list or full screens using the left and right arrows located down the bottom of the screen.

On every list screen a 'Sort by' popup menu is located on the top right so you can sort the current found set of records by certain fields in that table.

To close JobPro2Go press the 'left arrow' button located top left of the Home screen.

## JobPro2Go home screen

There are currently 2 jobs assigned to this user and 3 products/services that can be selected on jobs. Pressing the 'Sync up' button will push all details back to JobPro and remove them from your iPhone. Pressing the 'Sync down' button will pull down a list of any jobs that have been assigned to you as a user down to the device.
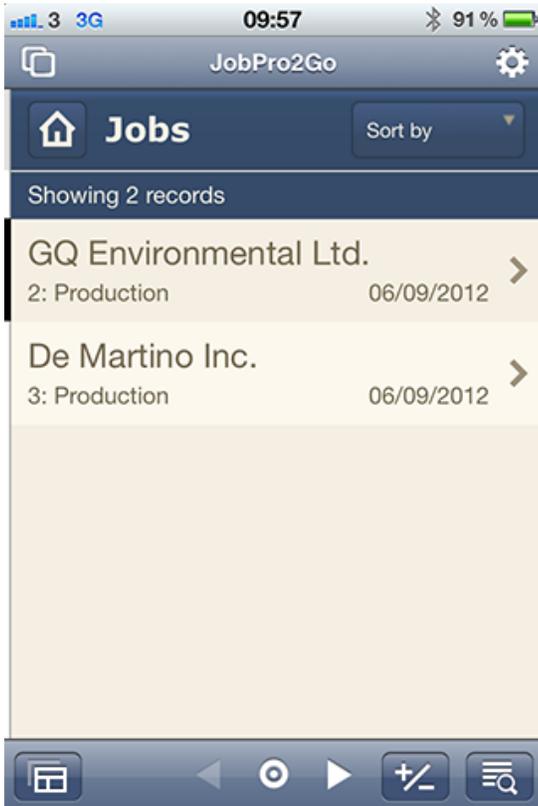
## Jobs - List

When you select the Jobs module you will be presented with a list of jobs, by customer, that you as a user have been assigned.
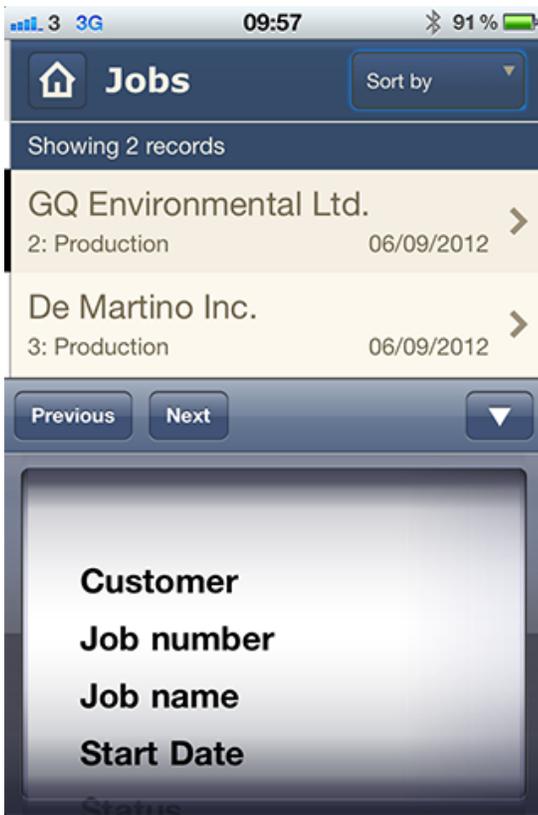
## Jobs - Sort List Options

From within the jobs module you can also choose to sort the job list by areas like customer, Job number, job name or start date. To do this simply tap on the 'Sort by' button in the top right hand corner.

## Jobs - Job View

Once you have selected the job you are interested in you will be presented with this view. Here you can view various details about the job including job location with a map (internet connection required), contact information, the job name and job brief. This is where you will also create timelogs, expenses, documents and notes for the job.

## Jobs – Communications View

Here we are viewing the contact information relevant to the customer for whom the job is for. You can make a call, send an email or initiate texting to your customer contact from here.
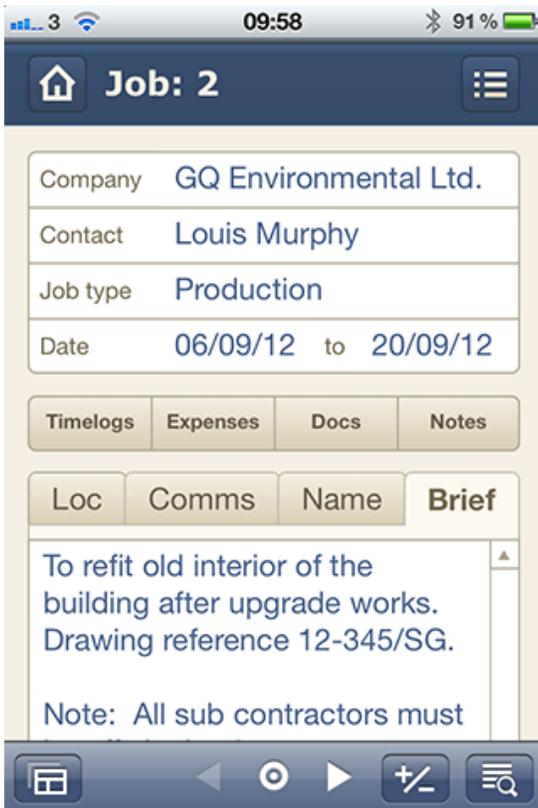
## Jobs – Job Brief

You can click on the 'Brief' tab to view the full job brief for the current job.
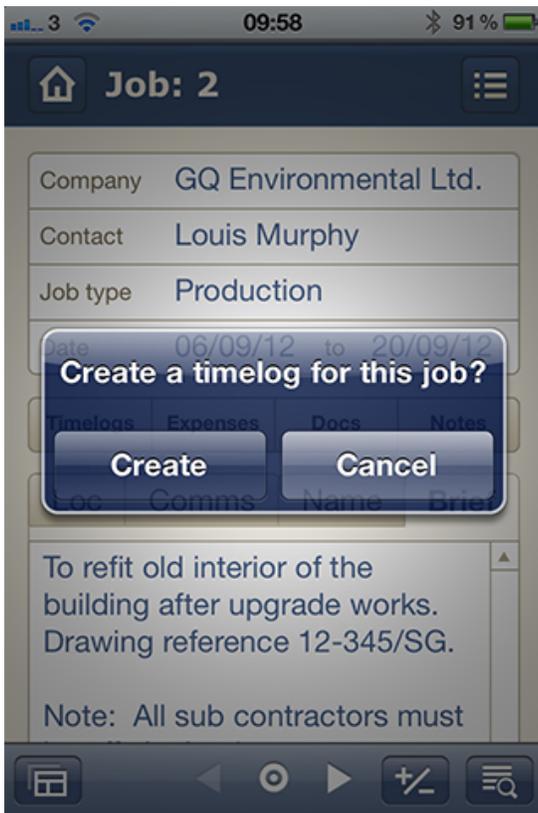
## Time Logs - Create

Here, from with in the job, we have just tapped on 'Timelogs' and are being asked for confirmation. If there are already timelogs present you will be asked if you would like to view current timelogs for this job or create a new one.
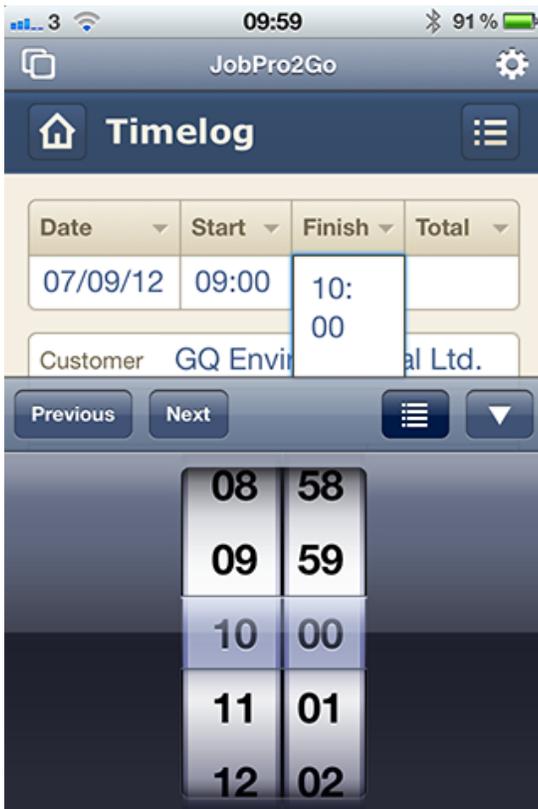


## Time Logs - Entry View

Following on from screenshot above we have confirmed we want to enter a timelog against this job, we have accepted the default date and set the start time, we are now just about to set the finish time. JobPro2Go will then work out the relevant time to charge to the job. Alternatively it is possible to tap the 'Total' field to be able to enter total time spend on the job.
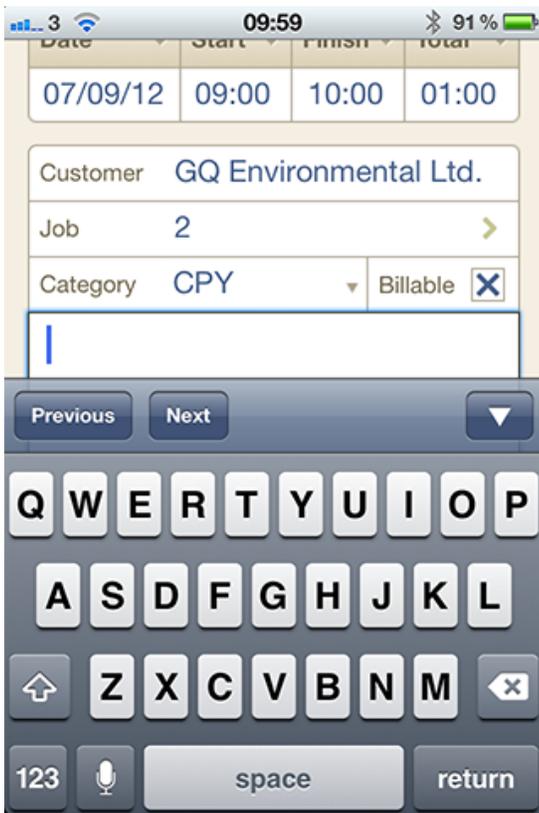
## Time Logs - Enter comments

Still within the timelog entry screen, here we are entering a comment to go with the timelog - this usually is a description of what work was carried out for the time being logged.
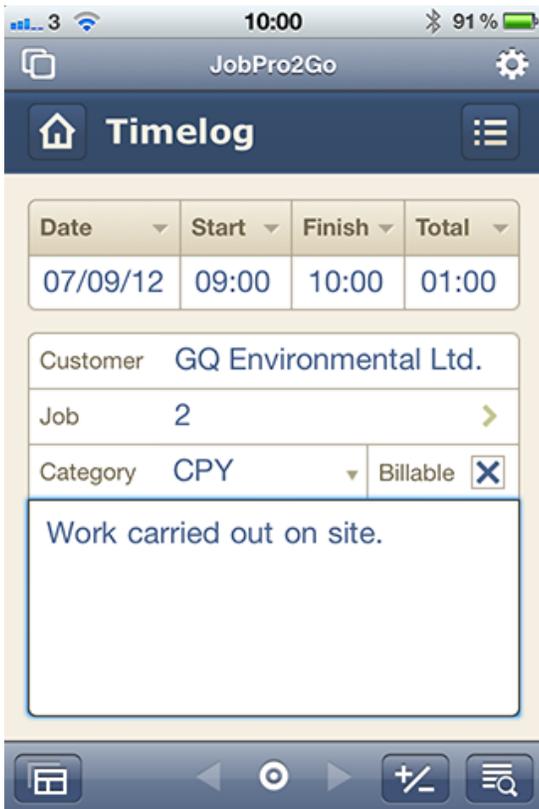
## Time Logs - Finished View

Here is the finished timelog. Note the timelog is, by default, set to be billable to your customer but that as well as other details like the category, can be changed by the user.
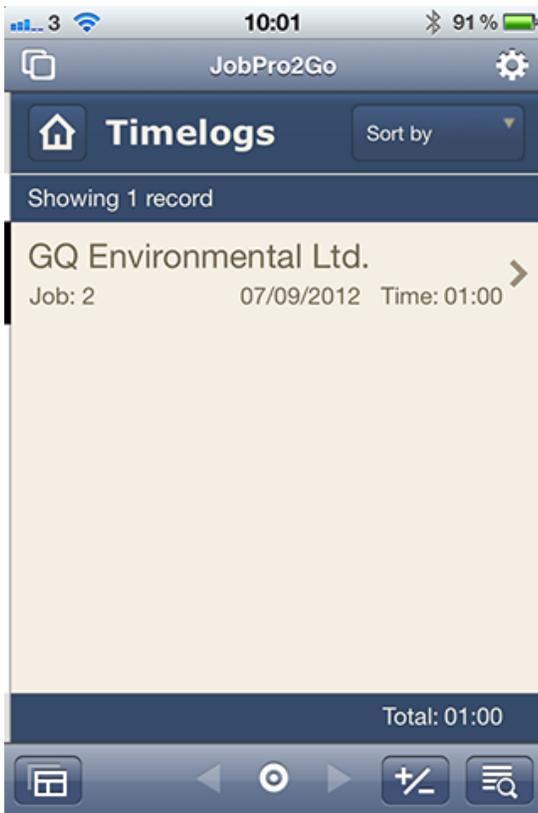
## Time Logs - List

Here is a list view of all timelogs entered. Only one in the case of this job.
To see the timelog list view either tap on the list icon button at the top right of the timelog entry screen or from the home screen tap on 'Timelogs' and then on the list icon. You will always be brought back to the last view you had left in the timelog module.
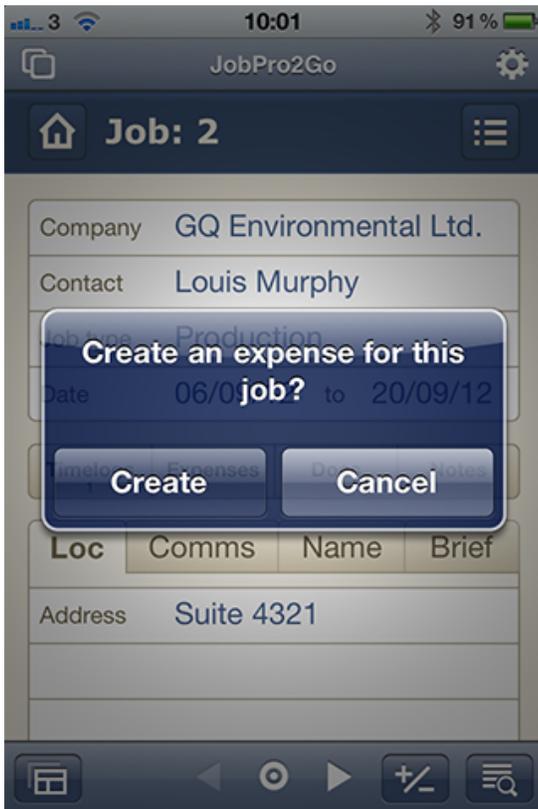
## Expenses - Create an expense

From within the job we have just tapped 'expense' to log an expense incurred on the job or to assign a piece of stock against the job for subsequent bill back to the customer. This functionality is ideal for logging products or parts used on a job. Stock gets updated back at the relevant location in the main system. A stock location can be one of your service vehicles for example. An ad-hoc expense can be entered in also, there is no requirement for the expense item to exist in the stock module.
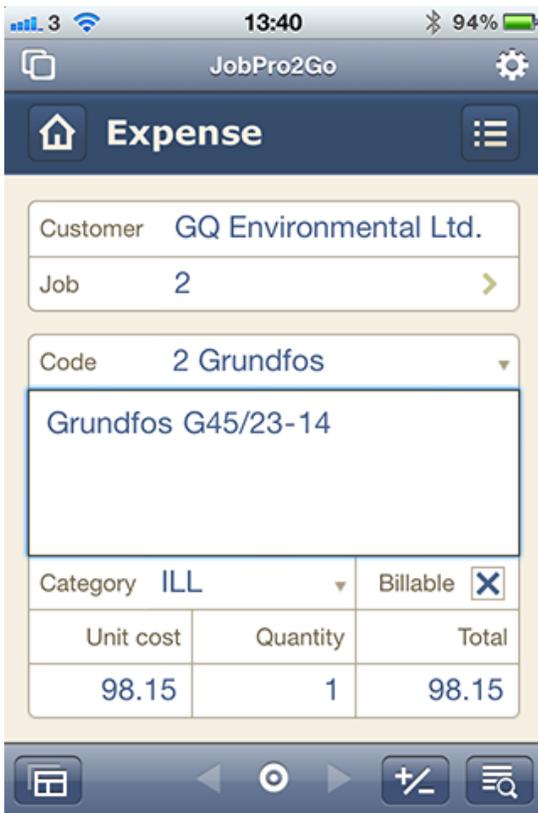
## Expenses – Finished View

We can now see that we have choosen to add an item of stock against the job. To add the item just tap on the 'Code' drop down menu to choose the product you require. You do not have to put an expense item onto the job that is in the products database. You can also free type an expense item into the field under the 'Code' field by simply tapping on it. You can always amend the selling price of the item in the main database before bill back to your customer. We can also tap on the list button in the top right to see a list of all expenses currently under this job.
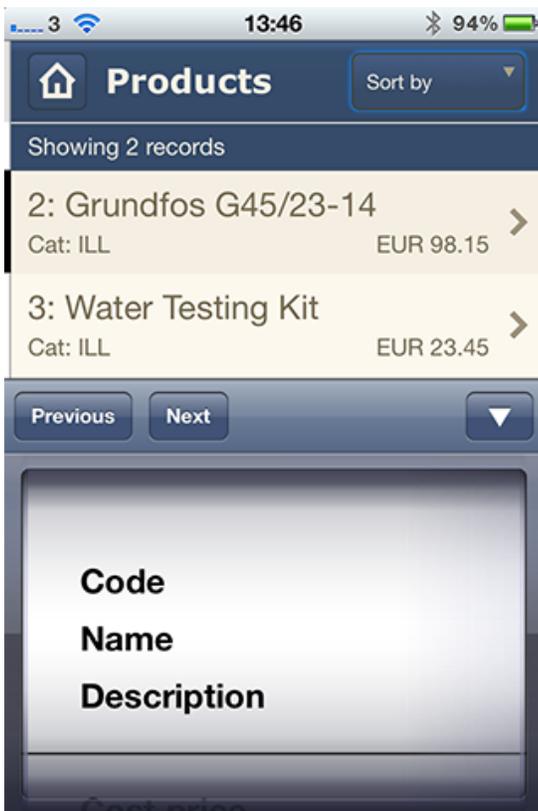
## Products – List

From the home screen we have tapped on the 'Products' module. We have tapped on the 'Sort by' button in the top right. Here we are looking at the product list view showing the sort options. Either choose your sort preference or tap the arrow pointing down to dismiss the sort screen.

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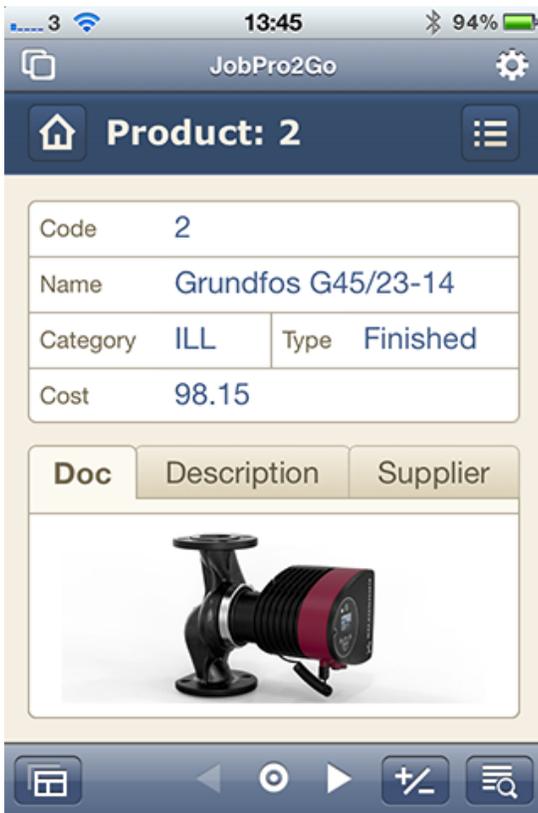
## Products - Product View

We have selected a product by tapping on it from the view above. We are now in product view looking at a stock product and its associated details. In this case the document is an image but it could, for example, be a PDF document that the user can click on and view. Ideal for viewing instructions in relation to the part/product.
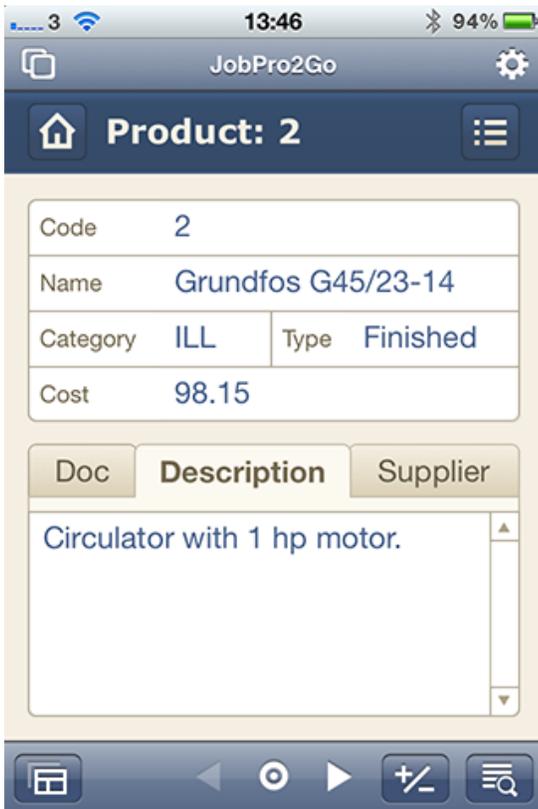
## Products - Description View

From within the product view above, we have selected the 'Description' tab by tapping on it.

## Products - Supplier View

Again from within the product we have choosen the 'Supplier' tab.  We are now looking at supplier related details.
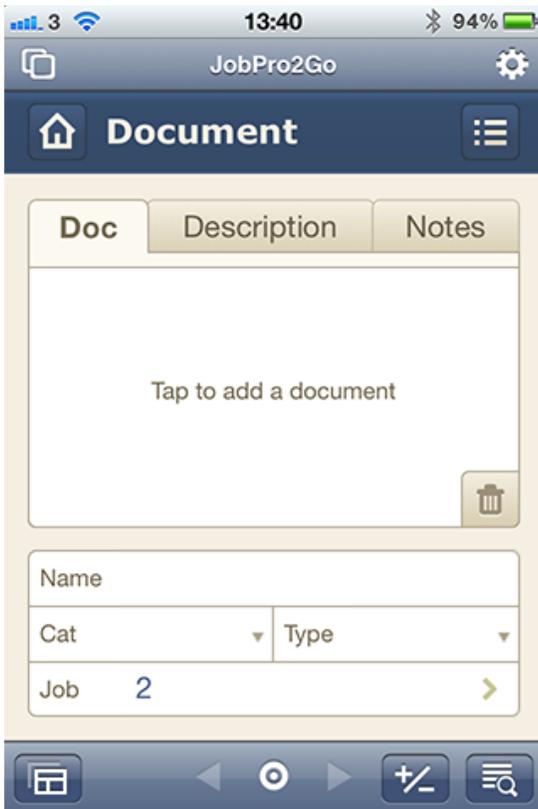
## Documents - Add a document

From within a job we have tapped on the 'Docs' tab are now in the documents module landing page, simply tap where indicated to add a document.
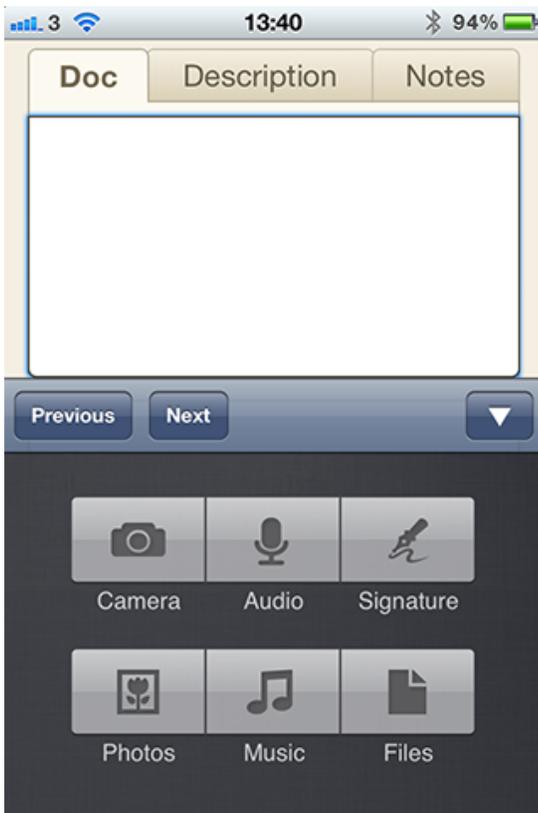
## Documents - Select document type

Once you have tapped to add a document you are presented with this screen where you select the type of document. It could be a photo of work carried out, a signature captured from a customer, an audio recording or any file on the device.
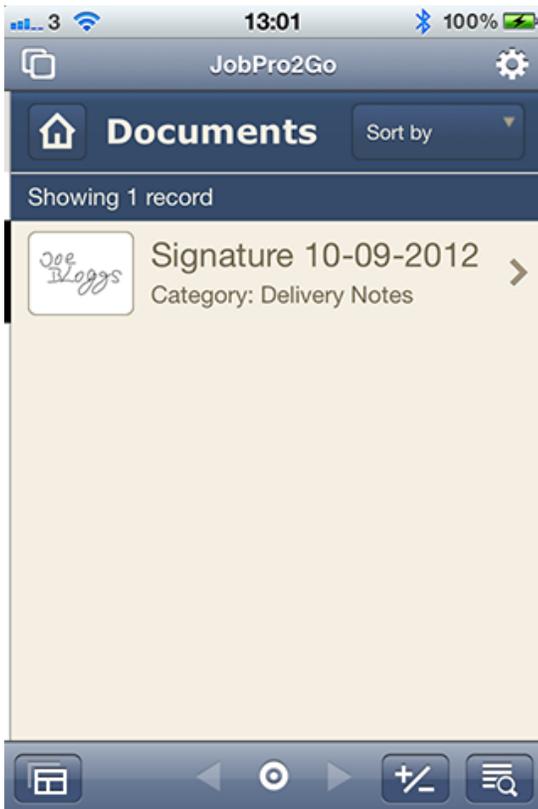
## Documents - List

From within the document module we have tapped on the list view button in the top right hand corner and are now in document list view showing all documents linked to jobs. These will be pushed back to the main JobPro database on sync.

## Notes

From within a job we have tapped on the 'Notes' tab and we are now in the 'Notes' module where users can create multiple notes linked to a job.