

Save Folder for JOBZ! (Important)

Some of the output from JOBZ! is automatic. That is, JOBZ! will make a PDF, with the PDF named appropriately, and attach the PDF to an email addressed to the intended recipient.

For example, if a sales rep clicks the "Email RFE" button, JOBZ! will create a PDF named with the job's project number, job title and "RFE." eg.: 867-12345 Example Job RFE.pdf

The project number is composed of the sales rep's employee number, a hyphen and a serial number.

The email will be addressed to the estimator specified in the sales rep's personalization. The job's specifications will form the body of the email as plain text (suitable for copying and pasting into an estimating program notes field) and the PDF will be attached to the email.

Or, when sending a Proposal using the Quick Quote (Blue Envelope icon) the PDF will be named "Proposal_12345.pdf", where 12345 is the estimate number. The PDF will be attached to an email addressed to the customer, with a note in the body of the email, saying "Please see the attached proposal." and the sales rep's return address information will appear as a signature block.

However, there is a requirement of a technical nature required to for this process to work correctly, or else JOBZ! will display an error message to the effect that "The file such and such cannot be created ... etc."

The requirement is that there must be agreement between the name of a folder somewhere accessible to the sales rep, and that name entered in the user's personalization (YOU button on Main Menu.)

Either the user or an IT person will need to create a folder on a drive accessible to the user, and ensure that the correct file path is entered on the user's personalization screen in the Save Folder field.

A default path would be, for example "C:/JOBZ_PDF" or "Macintosh HD/JOBZ_PDF"

Any drive accessible to the user may be specified on the personalization screen, but the folder must exist on that path.

Sales No 867	Work Type Cartons	Personalize SPEX
Region Northern California	Office San Francisco	
Email carpedata@verizon.net	Set Default Printer	
Save Folder C:/JOBZ_PDF	<i>Path for PDF's to be saved into, automatically. e.g.: Windows: C:/JOBZ_PDF Mac: MacintoshHD/JOBZ_PDF</i>	
CSR / Planner / Proj Mgr George Martin	CSR's Email carpedata@verizon.net	