JOBZ! Printing Sales Software

18338 Las Cumbres Road
Los Gatos, CA 95033
408-395-8183
jim@carpedata.com
http://www.carpedata.com

Collaboration and Security

As a sales rep using JOBZ! on a network, there are several ways you can benefit from collaboration with your coworkers.

As a rule, sales reps can only view and edit their own records. That is, contacts, jobs and other records such as memos or sales budgets, with their own name in the sales rep field. When you create a new record, your name is placed into the sales rep field automatically. Sales rep cannot change this field once a record has been created.

Managers can view and edit everyone's records. However, when a manager runs a report, it will only return records for sales reps that are in the same sales region as the manager. When a manager runs an organizational sort (In Estimating / Pending / Working etc.), it will prompt for filtering criteria.

CSR's can view and edit records with their name on in the CSR field. (Note- At the discretion of management, some CSR's are actually Managers, so they can access records that do not necessarily have their name in the CSR field.)

To enable a CSR to access your jobs and contacts, you must enter their name in the CSR field on the job or contact. If you enter a CSR name on the Personalization screen (YOU button on Main Menu) then it will be automatically entered into jobs that you create.

When a CSR runs a report or organizational sort (In Estimating / Pending / Working etc.), it will return records in which the CSR is identified as him or herself, regardless of who the sales rep is.

There is a similar role known as Estimator, which functions in the same way, though without access to contacts- only jobs.

There are a couple of exceptions to the rule of privacy between sales reps. For one, in the ADDRESS database, on the Shark List, everyone can see (only) the company name and your name & sales office for all of your Accounts and Prospects (but not Suspects, etc.) This helps prevent reps from accidentally calling on contacts that are called on by other reps.

The other exception is what is known as the Team Rep. A team rep is another sales rep appointed to a job or contact by the sales rep, thus giving the team rep the ability to view and edit that contact or job. The team rep field is located below the sales rep's name on the first SPEX screen in the JOBS database and on the Input screen in the ADDRESS database.

If you want to allow another sales rep to work on one of your jobs, (for example, while you are on vacation) just select that sales rep's name from the list that pops up in the team rep field.

If you are the team rep on a contact, you can create a new job from the ADDRESS Input screen JOBS tab, and the job will have your name as the team rep, the sales rep's name as the sales rep, the CSR's name as the CSR and of course, the contact's name as the sales contact on the job.

When a sales rep runs an organizational sort, it will return records in which the sales rep is identified as him or herself, as well as jobs on which they are a team rep.

If you are the CSR on a contact, you can create a new job from the ADDRESS Input screen JOBS tab, and the job will have your name as the CSR, the sales rep's name as the sales rep, the team rep's name as the team rep, and of course, the contact's name as the sales contact on the job.

A CSR can also create a new job from the JOBS database New Job button, and then decide which sales rep (from the entire company) should be the sales rep on the job. However, in order for the CSR to select a contact for the job, their name must be in the CSR field of the contact's ADDRESS record.

Jim Taylor June 25, 2009