

## Shipping with JOBZ! - Part 1, The Sales Rep

JOBZ! makes it easy for a sales rep to produce delivery instructions. Simply select a company name and then a person name from the pop-up list, which displays contacts in your address database. The contact's delivery address and phone, plus any standard delivery notes, pop into the delivery instructions screen.

JOBZ! tracks the quantity specified for each destination, and compares it with the quantity ordered. Each destination can be set automatically with the job's ship and due dates. Add a further note if you like. Carrier type can be specified.

The instructions can be printed as part of the Sales Order to Production, by themselves as a standalone document, or as part of the JOBZ! Ticket. They can also be exported as an Excel spreadsheet.

Shown below is the input screen for a delivery destination, stored along with a sales rep's prospects and accounts. There is one place in JOBZ! for all the people in your work life. The Category for this contact is Delivery, so it won't appear in the various sales and marketing contact reports.

The screenshot shows a software window with a title bar containing three colored buttons (red, yellow, green) on the left and a 'Go To' button on the right. Below the title bar is a navigation bar with a green background, containing the text '= 1 / 3 =' and navigation arrows: '<<', '<', '>', '>>'. The main area is a form with the following fields:

- Name: Central Receiving
- Title: (empty)
- Company: 11 by Seventeen
- Co. Type: Advertising Agencies
- Address: 1536 Valley Parkway
- Address Line 2: (empty)
- Country: (dropdown menu)
- City, State, Zip: Stockton CA 97524
- Email: (empty)
- Office: 408-666-7356 205 Cell
- Fax: 408-395-0813
- Cust. #: 36846
- Category: **Delivery**
- Vertical: (empty)

At the bottom of the form is a tabbed interface with tabs labeled: JOBS, / date, PO, MEMOS, - from, Notes, **Delivery**, Budget, Alt. The 'Delivery' tab is selected, showing a 'Delivery Note' section with the text: 'Flows into job delivery instructions' and 'Delivery notes specific to a contact can be stored in the contact's ADDRESS record, and will be pulled into a job's Delivery Instructions when you select them as a destination. These notes relate to deliveries to Central Receiving.'