



5563 Calle Ocho  
Carpinteria CA 93013  
408-666-7356  
jim@carpedata.com  
www.carpedata.com

## Integrating JOBZ! with Your Existing Systems

---

We are familiar with the concern that Sales would be using JOBZ! while Estimating and Production would be using other systems, especially in a multi-plant environment.

In fact, this is not a problem at all, but rather an opportunity to improve the workflow of your operation.

Compared to any manufacturing focused system, JOBZ! is a far better tool for the Sales Rep and Sales Manager, and a noticeably better experience for your customer. Beyond what is normally described as CRM (Customer Relationship Management) JOBZ! places the Sales Rep at the center of your job information workflow, communicating specifications, pricing, schedule and other essential job data with clarity, accuracy and speed.

With the Sales Rep at the wheel, data is entered once, and repurposed for multiple uses. Everybody is on the same page, automatically. This is because the Request for Estimate (RFE) becomes the Proposal, then the Sales Order to Production (SOP), the Confirmation of Order and ultimately the Invoice Draft.

The fact that the JOBZ! RFE and SOP arrive by email means that the two systems are actually connected, to the appropriate degree. Input from sales is "hard copy" consistently formatted, time stamped PDF (for accountability). Plus, copy/paste from the email into a sales notes field if you like.

You want an Estimator to create the Estimate, and you want a Production Manager to produce the Job Ticket. Asking a Sales Rep to be responsible for either of these is inappropriate. What you want the Sales Rep to do is provide the correct customer-derived information to these experts.

Put JOBZ! in the hands of Sales Reps and let your Estimating and Production staff keep working with the systems they are familiar and comfortable with. Our extensive experience shows that they will appreciate better, more consistent input from Sales Reps who use JOBZ!

Communications to the plant are filtered by business rules before sending (must specify essential fields such as type of packing, proofing, furnished materials, incoming materials date, etc.)

The Sales Rep is empowered with an archive of every job they have ever done for every customer; how it was specified, quoted, and billed. No more scrounging for old job tickets, or under-quoting a reprint.

These are just some of the ways that JOBZ! improves your workflow while allowing the Sales Rep to spend **hours less per day** on paperwork. "A day without JOBZ! is like a day without a cell phone or car."

This being said, since FileMaker is compliant with industry-standard formats such as SQL, customized data exchange is possible. Since our first software shipped in 1996, this option has been available, though rarely pursued. Once you have automated your Sales Reps with JOBZ!, most of your problems are solved.