JobSuite™

Features & Benefits

Our advertising and creative project management software is designed specifically for in-house creative teams or anyone overseeing the production of creative projects. JobSuite™ was designed by a former Traffic Manager who needed this tool to manage her projects. Her perspective allowed us to create an app that works specifically the way Traffic and Production works. Below are a few of the features in JobSuite™. But because not everyone works the same way so we customize to fit each client's needs.

OVERVIEW

- JobSuite is a project management application designed specifically for creative workflow
- JobSuite helps Creative and Marketing Teams streamline and automate their workflow.
- Centralized, cloud-based application requiring only a web browser
- Data is organized under workflow tabs that are intuitive to creative teams
- Navigation takes the user intuitively through creative workflow
- The Home Page is where the user lands after logging onto JobSuite. This dashboard provides a quick look jobs, tasks due & charts/graphs of metrics
- Search tools, including a global search, that make it easy to find job data. View & create custom list views to sort and display information the way you need it.
- Create reports and dashboards to provide graphic snapshots of information
- Built on the award winning Salesforce platform, which means your data is safe
- Full functionality including; Schedules, Teams, Quotes, Estimates, Purchase Orders, Vendor Invoices, Client Invoices, Timesheets, Collaboration, and more
- Customize - make it your own with custom field labels, variable fields, workflow, notifications, and custom modules built to track anything you need
- Collaborate on a social media wall for the Job - keeping all communication on a job in one place. Attach files, approve, follow a job, receive notifications & more

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MANAGING PROJECTS HAS NEVER BEEN EASIER!

No other solution includes as many out-of-the-box features with the built-in flexibility to design your system to fit your organization's needs. Customizable templates automate entry of most data, which can then be immediately shared across your organization. The Report Builder tool allows users to create their own searches, reports, charts and graphs to monitor key performance indicators (KPI).

CAMPAIGNS

- Campaigns are used to organize and group jobs
- Plan campaigns on color coded calendars
- Collect campaign details like; Budget, Start Date, End Date, Notes, and more
- Data for jobs assigned to the Campaign, is rolled up and displayed on the Campaign Detail layout; Job Budgets, Job Estimates, and Vendor Invoices

JOBS

- Each Job is assigned to a *Campaign* in order to group jobs together
- Assign Clients and Client Contact
- Job data is collected for each job record; Budget, start Date, End Date, Status Notes, Traffic Notes, to name a few
- Media Types and Schedule Types are used to define and categorize jobs
- Variable fields are used to capture custom data for the Job (i.e. Dates, Text, and Drop down Lists)
- Teams are assigned to jobs with Staff and Roles defined
- Collaborate on a "Social Media" like wall for each job. Send emails, attach files, revisions, previews, capture approvals, and more
- Attach Notes and Files to jobs

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SCHEDULES

- Schedule templates are used to create job schedules with the click of a button
- Schedule templates are used to automatically assign staff members to schedules based on Roles
- Update one due date on a task and you will prompted for an auto-update all tasks on the schedule
- Assign hours to tasks to plan workloads
- Lock tasks with permission sets to control who has access to editing
- Print a job Schedule for clients or team members

QUOTE REQUESTS

- Each Job is assigned to a *Campaign* to organize jobs
- Each Job can be assigned to a Client and Client Contact
- Job data is collected for each job record; Budget, start Date, End Date, Status Notes, Traffic Notes, to name a few
- Media Types and Schedule Types are used to define and categorize jobs
- Variable fields are used to capture custom data for the Job (i.e. Dates, Text, and Drop down Lists)
- Teams are assigned to jobs with Staff and Roles defined
- Collaborate on a "Social Media" like wall for each job. Send emails, attach files, revisions, previews, capture approvals, and more
- Attach Notes and Files to jobs

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ESTIMATES

- Create an Estimate for each job and add line items
- Each line item captures the GL Department, GL Code, Vendor, Unit Cost, Quantity, and Specs
- Approve an Estimate Line Item and create a Purchase Order from it
- Print the Estimate form

PURCHASE ORDERS

- Create purchase orders from approved job estimate line items with the click of a button
- Print the Purchase Order form and attach to email
- View Purchase Orders in list view with ability to search & sort

VENDOR INVOICES

- Keep track of Vendors and Vendor Contacts
- Log vendor invoices against jobs
- Log vendor invoices against purchase orders on jobs
- Build reports and dashboards to view vendor invoice data

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CLIENT INVOICES

- Create Client Invoices from job estimates
- Use the Invoice Allocation tool to create an invoice, and divide it among multiple clients or departments for billing purposes
- Import an invoice allocation template
- Print the Client Invoice form

CALENDARS

- Campaign, Job, and Task calendars color coded for easy viewing
- Drag and drop events on the calendar to change start or due dates
- Quick filters to slice and dice data for easy viewing (job tasks by Campaign, Job, Staff, Role, or Client)

TIMESHEETS

- Assign estimated time to individual job tasks
- Create a timesheet entry with a click of a button, enter hours and select the task from a drop down list
- Compare time entered to time estimated
- Notifications alert users when time entered exceeds time estimated
- Sort timesheet entry records by Campaign, Job, Client, Staff, or Task
- User reports and dashboards to see time entered by time period, client, staff, role, job, or campaign

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COLLABORATION/CHATTER

- A social media wall for each job
- Post comments, ask questions, share files
- Email posts to other users, respond to posts via email
- All of the collaboration is saved with the job for reference
- Attach up to a 2GB file to each post

REPORTS

- Build reports on the fly, from any data table in JobSuite (Campaigns, Jobs, Teams, Invoices, Timesheets, etc.)
- Create charts on reports
- Embed reports in Chatter posts
- Automatically send reports to specified users

DASHBOARDS

- Build dashboards from any data table to show snapshots in a graphic format
- Use dashboards to monitor metrics, KPI's, and workloads
- Control access with permission sets
- Display condensed versions of dashboards on the Home Page

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ADMIN & USER ACCESS PRIVILEGES

- Track Vendor and Vendor Contacts
- Track Clients and Client contacts
- Create schedule templates, creative brief templates, and quote spec templates
- Track holidays so that job schedules skip weekends and holidays
- Enter GL Departments and GL Codes to categorize and define costs
- Track Staff and Users

CUSTOMIZE YOUR WORKFLOW

- We can create custom workflows for you. Generate a report, send a form, send an email, and more…
- Add custom fields to layouts, change field labels
- Custom layouts for Clients to log in and see their data
- Custom layouts for Vendors to log in and see their data
- Activate Custom Modules like:
    - Music tracking: track music usage at the job level
    - Graphics/Deliverable tracking; can be used to track graphics used on jobs
    - Billboard: management tools to track Billboards, Billboard Vendors, Billboard Invoices, and Billboard Maps
- We can create custom integrations with other applications using standard APIs. Talk to your JobSuite account rep for more information and we will review your needs. We have integrated print shops, accounting tools, billboard applications, CRM, and more...

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PLATFORM SECURITY

- Hosted on Salesforce, the world's most successful enterprise application platform.
- JobSuite is 100% native to the SF platform. All code and data is stored inside Salesforce, which means your data is safe and secure.
- Turn off features you don't need to make the UI cleaner and easier to use
- Use profiles and permission sets to control user access to data and features
- Visit trust.saleforce.com at any time to see server status, maintenance windows, and performance

UPDATES

- Platform Updates 3x per year
- A new UI look and feel coming in Spring 2016
- Updated JobSuite Mobile App

Thank you for considering JobSuite. Each quarter we launch updates that take advantage of advances in the Salesforce platform, new technologies, and ideas submitted by users. This list evolves monthly. We have tried to assemble many of the key features of JobSuite here in one place. However, a demo is the only way to truly see all of the features. Most importantly, talk to your JobSuite rep about the business challenges you face. We will work with you to determine the best way to solve your business issues using JobSuite.

Call us today at 858-449-8978 or email sales@etrackit.com for more information or to set up a free demo trial risk free for 30 days.