



JobSuite Sample Workflow and Template

We have spent 20 years helping creative teams implement project management software. Seems like we have seen it all, but each time we learn something new. One thing is certain, every creative team has their own unique issues and challenges.

The following sample workflow will help you get an idea of a good method to use for organizing your process. Use the template at the end of this document to fill in your own workflow outline. By outlining your workflow like this, it will be much easier to implement into a software platform. And at the very least, it will help you clean up your process!

1. Job Requests

Sample Flow:

- Jobs can be requested by clients using the web based job request form or Project Managers can create job requests directly in JobSuite.
- When a job is requested the status is set by default to “Requested”.
- When a job is requested an email is sent to “tom@etrackit.com”.
- Job Request forms must have specs completed, a requested due date, and a description filled out.

2. Team Assignment

Sample Flow:

- Traffic Manager logs into JobSuite and finds all of the jobs with the status of “Requested” and changes the status to “Active”.
- Art director assigns the team to the job.
- Traffic Manager creates a schedule and emails the work order to the team.



3. Create Schedules

Sample Flow:

- Traffic manager creates a schedule and emails a Work Order to the team.
- “Tasks Due” populate on each team member’s Home Page.
- Tasks are marked done on the Home Page once complete.

4. Work on Jobs

Sample Flow:

- Creative team receives daily emails with a list of tasks due that day.
- Creative team also logs into JobSuite and marks tasks done on their Home Page.

5. Create Estimates

Sample Flow:

- Production Manager builds an estimate to record the cost of in-house time and outside print costs.
- The estimate is emailed to the client. When the estimate is approved by the client, the Production Manager approves the line items in JobSuite.

6. Issue Purchase Orders

Sample Flow:

- Purchase orders are created from approved estimate line items.



7. Log Vendor Invoices

Sample Flow:

- Production Managers log vendor invoices against purchase orders on jobs.

8. Bill Clients

Sample Flow:

- Production Manager creates an invoice and marks as approved.

9. Reports

Sample Flow:

- Status report is run weekly for the production meeting.
- Completion report is run weekly for the VP of Creative.
- Monthly billing report is run at the end of the month for Finance.
- Daily hot sheet is run and sent to each Creative.
- Finance runs a report of vendor invoices created that week.

10. Dashboards

Sample Flow:

- Use widgets on your dashboard that show the following:
 - Number of active jobs by client
 - Number of active jobs by campaign
 - Invoiced this quarter

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So, now that you've seen the type of workflow that you can achieve using a project management software like Jobsuite, you can try it out for yourself! Follow the formula below and write out your own outline or print this document and write in your own workflow notes.

Step 1:

- 1.1
- 1.2
- 1.3
- 1.4

Step 2:

- 2.1
- 2.2
- 2.3
- 2.4

Step 3:

- 3.1
- 3.2
- 3.3
- 3.4

Step 4:

- 4.1
- 4.2
- 4.3
- 4.4

Step 5:

- 5.1
- 5.2
- 5.3
- 5.4

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Step 6:

- 6.1
- 6.2
- 6.3
- 6.4

Step 7:

- 7.1
- 7.2
- 7.3
- 7.4

Step 8:

- 8.1
- 8.2
- 8.3
- 8.4

Step 9:

- 9.1
- 9.2
- 9.3
- 9.4

Step 10:

- 10.1
- 10.2
- 10.3
- 10.4

Now that's a happy workflow!