JOBZ! Collaboration & Security

JOBZ! enables collaboration among coworkers by sharing access to data, according to business rules.

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 reps 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 (if you have more than one sales region). 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 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.)

As a Sales Rep, 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 default 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.

When CSR's and Estimators log in to JOBZ! they will find a Home screen that is designed for their roles.

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 Ownership tab in the ADDRESS database. The SORT screen makes it easy to find jobs on which you are a team member, by selecting the status category.

If you want to allow another sales rep to work on any 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 on SPEX 1.

If you want to share all your data with another sales rep, they can simply log in as you, if they know your login and password. However, once they do this, they can only function as you, until they re-login as themselves. The Team Rep feature means they can log in as themselves, and still collaborate with you.

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.
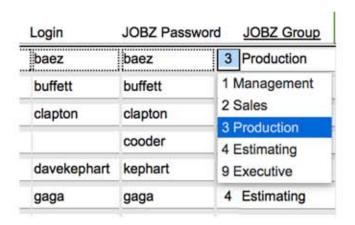
A sales manager asks:

We're adding some sales support folks and I would like to give them access to certain sales reps records without giving them access to all sales reps records.
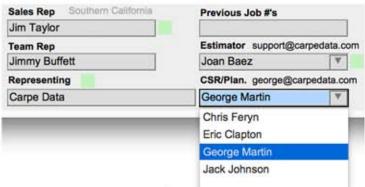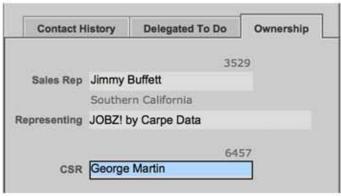
Is this possible?

Answer: Totally.

Put them in the Production JOBZ Group in Admin. Then they will have access to any records with their name in the CSR field.
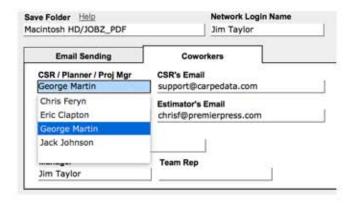
Login	JOBZ Password	JOBZ Group	
baez	baez	3	Production
buffett	buffett	1 Management	
clapton	clapton	2 Sales	
	cooder	3 Production	
		4 Estimating	
davekephart	kephart	9 Executive	
gaga	gaga	4 Estimating	

In a job, on SPEX 1

Sales Rep	Southern California	Previous Job #'s	
Jim Taylor			
Team Rep		Estimator support@carpedata.com	
Jimmy Buffett		Joan Baez	▼
Representing		CSR/Plan. george@carpedata.com	
Carpe Data		George Martin	▼

Chris Feryn
Eric Clapton
George Martin
Jack Johnson

In a contact INPUT in ADDRESS

Contact History	Delegated To Do	Ownership

3529

Sales Rep Jimmy Buffett
Southern California

Representing JOBZ! by Carpe Data

6457

CSR George Martin

Save Folder Help
Macintosh HD/JOBZ_PDF

Network Login Name
Jim Taylor

Email Sending	Coworkers

CSR / Planner / Proj Mgr
George Martin

CSR's Email
support@carpedata.com

Chris Feryn
Eric Clapton
George Martin
Jack Johnson

Estimator's Email
chrisf@premierpress.com

Jim Taylor

Team Rep

If the sales rep sets this as a default on their YOU screen it will happen automatically as new records are created.

For existing contacts or jobs you can do a Replace Field contents. (See next page.)

Replace Field Contents

There are times when you might want to make the same change to an entire set of records. For example, to change the assigned sales rep on 50 different contacts. Well, actually, there is a button for managers to use to reassign the sales rep on any number of contacts at once. Or maybe you need to change the address on all ten contacts in a company. Well, actually you can do this by pulling down Action > Change Common Data. But what if you need to change something on a whole bunch of jobs or contacts that we haven't made a button for?

You can, if you have Management access. It is called the Replace Field Contents command, and it is so powerful that we only allow managers to do it. For one thing, it can't be un-done. And it can change all the records in the database, permanently. Can you imagine if all ten thousand contacts are re-named John Doe? (By the way, if this happens we can help you do an emergency restore from last night's backup, so let us know right away if you really screw up.)

But if you are careful, and know what you are doing, it can save you a lot of time. Just follow these directions:

Let's say you have 16 jobs that all need the job title to be changed from "2009 Calendar" to "2010 Calendar." And let's say you don't want to click through every job and type or paste the change into each job.

First, make sure you have just those jobs "Found" that need to be changed. If you are not comfortable with what this means then stop now- you need basic training.

Next, on one of those 16 jobs (any one) click into the field that is to be changed on all the found records, and make it the way you want all of them to be. In our example here, we click into the job title field and make it say "2010 Calendar."

Then pull down Scripts, Manager Access (#1) to invoke management menu commands, which will not appear to do anything, but it will cause the Replace Field Contents command to appear in the Records menu.

Next, pull down the Records menu (it is called Jobs or People, depending on where you are) and invoke the Replace Field Contents command. Note that it will prompt you with exactly what will happen if you proceed. Just click Replace and all of the 16 jobs will be renamed "2010 Calendar."

The only way this can go wrong is if you don't read the dialog box, and you happen to be in the wrong field by accident, so pay attention. Don't do this when you are distracted.