CARPE´ DATA

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Implementing JOBZ! at Your Company

The implementation of JOBZ! at your company will be a consultative phase in which we work with you to configure the software to your organization in several areas:

- Building a database of your users, with privileges according to their roles and job titles. (You will be able to modify this roster and all the configurations below as your organization changes over time.) The user database also contains your company logo graphics and the personal signatures of the sales staff used on customer-facing documents.

- Personalizing the terminology used in your company's business processes, so that the user interface reflects your preferred paper and proofing brand names, manufacturing terms, customer and prospect marketing segments, and so on. This will result in improved consistency in the way your sales force specifies jobs to estimating and manufacturing, and in the way prospects and customers are categorized.

- Defining the organizational reporting structure of companies, sales offices, sales regions, sales managers and manufacturing facilities. JOBZ! is equally at home in a small family business or a large corporate environment with sister companies.

- Enabling JOBZ! to calculate sales commissions according to your company's plan. Commission visualization takes place when quoting the job, and a commission worksheet can be included on the sales invoice draft. Many types of commission plans are already programmed within JOBZ!, including value-added, base + markup sharing, or variable based on markup and equipment type.

- Migrating existing contact information from your data files or spreadsheets, assigning these contacts to the appropriate sales staff for their access from day one.

- Training, including a full course of video tutorials on our web site, and unlimited on-line group webinar training sessions. Personal onsite training is also available.

- Installing and configuring the database server software, and training of your IT staff in ongoing maintenance and backup strategies.

- Approving or modifying the industry-standard legal terms and conditions contained in customer proposals.

The quoted implementation fee covers this entire process, and all of the application software required to operate the system. Ongoing use of JOBZ! is covered by quarterly billings based on user count tiers.

You provide the server hardware, the users' Mac or Windows computers, and access for Carpe Data to configure the server. We work closely with your IT staff, who configures the individual users with the application software and access to your network, including email, printers and any terminal server or other remote network access systems.

This implementation process results in a program that is highly tuned to your company's unique situation, while benefitting from best practices developed over a long history of successful engagements at other companies in your industry.

Jim Taylor   May 17, 2013