CARPE′DATA

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Reassign Jobs in JOBZ!

If you have reassigned a contact to a new rep in ADDRESS, you might want to give the new rep access to the jobs that the old rep has entered for that contact. Do this by entering the new rep's name into the Team Rep field on those jobs. (1)

The new rep can then FIND those jobs, as well as view them on the SORT screen, Job Team tab (2) and when the new rep makes a clone or a dupe of that job, their name will be placed into the Sales Rep field on the copy. This preserves the historical data of a billed job but allows the new rep to build on it.

To give the new rep access to all Jobs that a previous rep had entered for that customer, FIND JOB: (Company Name + Sales Rep). (3)

You can narrow the found set of jobs using Job Status in the find operation, for example, by specifying Company Name + Sales Rep + Status Billed. This will find only the jobs that the old rep actually completed for the customer. (4)

Or you can use the Additional Find Request feature to build a set of jobs by multiple criteria.

For jobs that are Working, Pending or In Estimating: FIND JOB: (Company Name + Sales Rep + Status Working > Additional Request: (Company Name + Sales Rep + Status Pending > Additional Request: (Company Name + Sales Rep + Status In Estimating) Then Continue. The found set will include jobs of all 3 status, with the same company name and sales rep. Once you have the found set:

Changing a set of records all at once with Replace Field Contents, available only to managers:

Let's say you have 160 jobs that all need a new Team Rep appointed and you don't want to click through every job to make the change on each one.

First, make sure you have just those jobs or contacts "Found" that need to be changed. That is, perform a FIND that results in a Found Set of records that all need the change.

Next, on one of those 160 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 this case, on the SPEX screen, the Team Rep field.
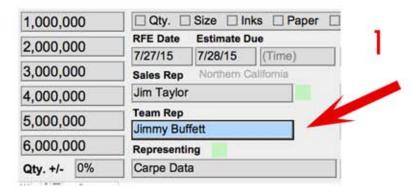
Then immediately pull down Scripts, Manager Access to invoke management menu commands, which will not appear to do anything, but it will cause the Replace Field Contents command to appear in the Jobs menu. (5)

Next, pull down the Jobs menu and invoke the Replace Field Contents command. Note that it will prompt you with exactly what will happen if you proceed, and you may cancel. Just click Replace and all of the 160 jobs will be changed at once.

Note that this cannot be undone- it makes a permanent change to all of the found records. Be sure to READ the dialog box that asks you if you want to continue. 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.

Screen shots follow:

Jim Taylor   Aug 6, 2015

1,000,000	☐ Qty. ☐ Size ☐ Inks ☐ Paper ☐	

1,000,000	**RFE Date** **Estimate Due**
2,000,000	7/27/15 7/28/15 (Time)
3,000,000	**Sales Rep** Northern California
4,000,000	Jim Taylor
5,000,000	**Team Rep**
	Jimmy Buffett
6,000,000	**Representing**
Qty. +/- 0%	Carpe Data

1

2   Pull down Organize > Sort

Go To	Organize	Find...	SORT SCREEN: Select a Status Filter, Then View by Tabs		Filter by **Status:**	**Pending**

Login: Jim Taylor   **Rep:**   **Jimmy Buffett**

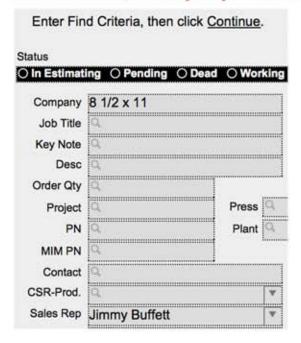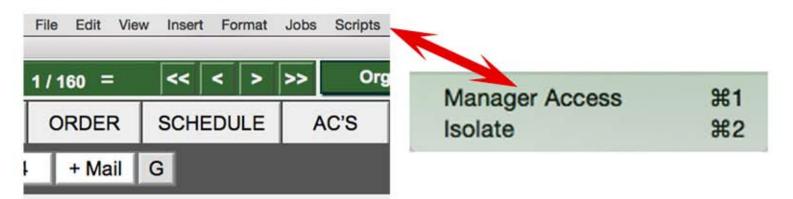| By Company & Title	By Invoice Date	By Modification Date	By Order Date	By Creation Date	On Job Team	CSR

Jobs You are a Team Rep on	By Company - Title	Lead Rep		
11 by Seventeen - Heidelberg Presentation Folder 2015		Jim Taylor	4 page presentation folder with 2 capacity pockets.	Pending
11 by Seventeen - Heidelberg Service Brochure 2015		Jim Taylor	12 pages + cover	Pending
11 by Seventeen - Heidelberg Sheetfed Brochure 2015		Jim Taylor	24 pages + cover	Pending

3   Find Job;   Company + Sales Rep

Enter Find Criteria, then click Continue.

Status

○ **In Estimating**   ○ **Pending**   ○ **Dead**   ○ **Working**

Company	8 1/2 x 11
Job Title	🔍
Key Note	🔍
Desc	🔍
Order Qty	🔍
Project	🔍 Press 🔍
PN	🔍 Plant 🔍
MIM PN	🔍
Contact	🔍
CSR-Prod.	🔍 ▼
Sales Rep	Jimmy Buffett ▼

4   Find Job;
Company + Sales Rep + Status Working

Enter Find Criteria, then click Continue.

Status

○ In Estimating   ○ Pending   ○ Dead   ⦿ **Working**

Company	8 1/2 x 11
Job Title	🔍
Key Note	🔍
Desc	🔍
Order Qty	🔍
Project	🔍 Press 🔍
PN	🔍 Plant 🔍
MIM PN	🔍
Contact	🔍
CSR-Prod.	🔍 ▼
Sales Rep	Jimmy Buffett ▼

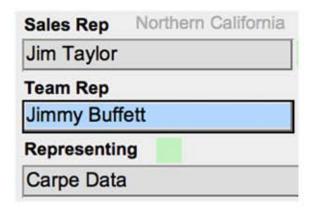# Add criteria to build a limited found set.

Enter Find Criteria, then click Continue.   Additional Find Request

Changing multiple records at once. Starting with the correct found set, pull down Scripts > Manager Access

File   Edit   View   Insert   Format   Jobs   Scripts

1 / 160   =   <<   <   >   >>   Org

ORDER   SCHEDULE   AC'S

+ Mail   G

Manager Access   ⌘1
Isolate   ⌘2

Change one of the records (any one), then stay in that field, and pull down Jobs > Replace Field Contents

Sales Rep   Northern California
Jim Taylor
Team Rep
Jimmy Buffett
Representing
Carpe Data

Jobs   Scripts   Tools   Window   Mo

New Job   ⌘N
Find Job   ⌘F
Duplicate Job   ⌘D
Delete Job...   ⌘E

Go to Job   ▶

Show All Jobs   ⌘J
Show Omitted Only
Omit Job   ⌘T
Omit Multiple...   ⇧⌘T

Modify Last Find   ⌘R

Sort Jobs...   ⌘S
Unsort

Replace Field Contents...   ⌘=
Relookup Field Contents

Revert Record...

Replace Field Contents

Permanently replace the contents of the field "JobTeam" in the 160 records of the current found set?

READ THIS!

● Replace with: "Jimmy Buffett"

○ Replace with serial numbers:
  Initial value: 1
  Increment by: 1
  ☐ Update serial number in Entry Options?

○ Replace with calculated result: Specify...

Replace   Cancel

The change will be made to all records found. Be sure you are changing the correct field.