



## Save Folder (v.14+)

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Some of the correspondence output from JOBZ! is automatic. That is, JOBZ! will make a PDF, with the PDF named appropriately, and attach the PDF to an email addressed to the intended recipient.

For example, when sending an "Email PDF Proposal", the PDF will be named Proposal\_1118.pdf, where 1118 is the Estimate number, and the email will be addressed to the customer.

Or, if a user selects "Email RFE", JOBZ! will create a PDF named with the job's record number, customer company name, an abbreviated job title and "RFE." eg.: 867-12345 Example Company Example Job RFE.pdf

(The record number is composed of the sales rep's employee number, a hyphen and a serial number. Estimators can file these PDF's and they will be listed logically in their folders for future reference)

The RFE email will be addressed to the estimator specified in the job, with the default being the estimator set in the sales rep's personalization.

In the case of a Sales Order to Production, it would be named SOP\_67890.pdf, where the number is the Estimate number.

The SOP email will be addressed to the Planner/CSR specified in the job, with the default being the Planner/CSR set in the sales rep's personalization.

In the RFE and SOP email, the job's specifications will form the body of the email as plain text (suitable for copying and pasting into an estimating program notes field) and the PDF will be attached to the email.

General correspondence involving other forms, such as memos, change orders and so on will follow a similar set of rules.

The location these PDF's will be stored on the sender's system in a folder that the user specifies in their personalization (the YOU screen) known as the Save Folder.

This folder name (for example JOBZ\_PDF) must exist, and the user must have write privileges to add files to it. On the YOU screen you must also enter the name of the drive on which the folder is located. (Note that the \ and / are interpreted inconsistently across operating systems- sometimes treated as equivalent.) Any drive accessible to the user may be specified on the personalization screen, but the folder must exist on that path, and the user must have access to that folder.

Examples:

C:\JOBZ\_PDF or D:\JOBZ\_PDF or Macintosh HD/JOBZ\_PDF or Jim's iMac/JOBZ\_PDF

If there is a problem with this process, the program will still prepare the email with attachment, but save the file to the users temp folder, in the application folder, and be removed upon exiting the program.

Earlier versions of JOBZ! may produce an error message: "The file such and such cannot be created ... etc." If the file path fails like this, the file will then be given a generic name "Attachment.pdf" and saved to the user's desktop temporarily, and overwritten the next time it happens. The mail and generic attachment are then created, ready to send.

Please note that if you select the "Name PDF" or "PDF" action instead of "Email PDF", you will be prompted to enter a file name yourself, and specify the destination folder. You can then check a box that says "Create email with file as attachment" and the pdf will be attached to the email.