

New Features in JobOrder™ 2009

JobOrder 2009 includes 4D 2004.7 Build 3, our programming language, certified for Windows XP / Vista and Macintosh OS X 10.5.8.

If you have not already installed the JobOrder Client for JobOrder 2008 or JobOrder 2009, you will need to update your JobOrder Clients using new JobOrder 2009 installers. If you have already installed the JobOrder Client for JobOrder 2009, the new JobOrder 2009 Client will be automatically installed on each Client computer.

JobOrder 2009 has many internal changes, including improvements to both speed and stability. If you have not recently performed any preventative maintenance on your JobOrder data file, please call Customer Support for guidance.

JobOrder 2009 Server will be distributed both for Macintosh OS X 10.5.8 and for Windows XP and 2003.

The 4D Client for JobOrder 2009 will be distributed both for Macintosh OS X 10.5.8 and for Windows XP and Vista.

If you are running a version of Mac OS X earlier than OS X 10.5.8, please upgrade to OS X 10.5.8 for improved stability.

All known bugs have been fixed.

Enhancements are briefly described below, categorized by area or function.

New Features in JobOrder 2008

Because the enhancements in JobOrder 2008 were so extensive, we recommend that you re-read the latest version of 'New Features in JobOrder 2008', just to be make sure that you are aware of all the productivity-enhancing improvements.

Calendars

JobOrder now uses a new plug-in for our Calendar displays, improving the visual appearance, speed, and functionality.

Interactions

A bug that caused editing or deleting Interactions to crash has been fixed.

Job Recalculation

We have completely rewritten the underlying logic to recalculate Jobs, Phases, Activities, Expenses, Time Slips, and Expense Details. This change improves both speed and accuracy inside JobOrder.

Navigator (formerly called the Main Palette)

The Navigator has been redesigned with new Icons, coordinated with Windows Vista and Macintosh OS X 10.5.

At the top right, a new Search box allows you to search AREAS, HISTORY, POWER TOOLS, and REPORTS. Type all or part of the item for which you are searching and press 'return' or 'enter'.

Using this new Search box is a very powerful and easy way to find all of the menu items in JobOrder.

Using the 'drag and drop' feature described below to create your own subcategories is also one of the best features of the new JobOrder Navigator.

On the left side of the Navigator, we have added a 'Finder' mechanism, containing 'HOME', 'AREAS', 'POWER TOOLS', 'REPORTS', 'UTILITIES' (if you have Database Administrator security access), and 'HISTORY'.

'HOME' displays the 16 main icons and the Search box.

'TOPICS' has two major options: 'System Topics' displays all the AREAS, POWER TOOLS, REPORTS, and UTILITIES in JobOrder, organized by the main categories of Accounting, Administration, Buy & Sell, Plan, and Track.

'User Topics' allow you to create your own categories and to add any AREAS, POWER TOOLS, or REPORTS, organized as you choose. Use the 'Add Topic', 'Delete Topic', 'Add Item', and 'Delete Item' buttons to manage 'User Topics'.

'AREAS' contains all the AREAS in JobOrder to which you have access, organized by an 'A – Z' Rolodex at the top of the page.

'POWER TOOLS' contains all the POWER TOOLS in JobOrder to which you have access, organized by an 'A – Z' Rolodex at the top of the page.

'REPORTS' contains all the REPORTS in JobOrder to which you have access, organized by an 'A – Z' Rolodex at the top of the page.

'UTILITIES' contains all the UTILITIES in JobOrder to which you have access, organized by an 'A – Z' Rolodex at the top of the page.

'HISTORY' contains the last 25 records you have accessed in JobOrder AREAS, organized by an 'A – Z' Rolodex at the top of the page.

PLEASE NOTE CAREFULLY: You can use drag and drop to create subcategories with favorite items under 'AREAS', 'POWER TOOLS', 'REPORTS', UTILITIES', and 'HISTORY'.

For example, if you want to have 'Media Rates' always appear under AREAS, you can click on AREAS, click 'M', click on 'Media Rates', and then drag it back to the word 'AREAS'. By single-clicking on the triangle at the left of the word 'AREAS', you can expand or collapse all the items that have been dragged as favorites.

This same drag and drop principle also works for 'POWER TOOLS', 'REPORTS', UTILITIES', and 'HISTORY'.

We have added the ability to delete a User report from the Navigator by using the Delete (windows Backspace) button.

New Palettes and Icons

We have updated the Icons on most Palettes to have a look-and-feel similar to Macintosh Leopard and Windows Vista.

Notification Rules

In Notification Rules, we have added a new Notification for 'Interaction Type has been entered'.

In List Items, we have added a new option called 'Include in Interaction Notifications'. You can go into each Interaction Type List Item, and turn this on for those Interaction Types you wish to generate Notifications for.

This will allow you to send Notifications for Interaction Types such as:

- Brochure sent
- Brochure sent via email
- Postcard sent
- Portfolio sent via email
- Called
- Called & Contact Made
- Thank you Card Sent
- Success Story Received
- Events Held

SmartScheduler

SmartScheduler now uses the new Calendar in JobOrder.

In this release you cannot drag from an Activity to a date on the new Calendar to create a Time Slip. This functionality will be added in a future JobOrder release.

TimeLines

We have incorporated a new plug-in for displaying TimeLines to improve the visual appearance and functionality.

Most of the new functionality has been implemented in this release, but Printing TimeLines will be available in JobOrder 2010, now under development.

To Do Manager and Personal To Do

JobOrder has an interesting area called 'Priorities'. The Priorities Area is used to store records for the Prioritizer. A Priority is an Activity that has been assigned the order, precedence, or importance in which it should be completed. Priorities can be assigned to individual resources or can be temporarily left unassigned. You can only create Priorities in the Prioritizer, but you can edit them in the Priorities area. The Prioritizer allows you to manage Priorities by resource and to reassign them to other resources.

Because Activities are always contained in a specific Job, each Priority is, by

definition, always connected to a specific Job. But it can be very useful to manage simpler Priorities, not assigned to specific Jobs. JobOrder calls these 'To Do' items and allows you to assign them either to specific resources or to leave them temporarily unassigned.

To Do items are managed in the 'To Do Manager' and in 'To Do Personal' which is a simplified manager designed for use by individuals managing their own To Do list. At the top of this post is a screen shot from JobOrder showing the relationship between Priorities, Work Orders, and To Do items.

In the To Do Manager, you can display To Do lists for 2 resources and you can drag between the 2 resources to reassign To Do items. You can also drag up-and-down an individual's list to reschedule their To Dos. Although To Do items can have an optional 'Date Required', generally To Do items are performed sequentially.

To Do items are a rapidly evolving concept in JobOrder. Please email with any suggestions or enhancement requests.