# Building Construction

## First installation and industry-pack setup

| Your starting point | What this guide helps you do |
|---|---|
| New customer administrator | Install the delivered customer folder, activate the licence and select the right company/industry scope. |
| Industry setup owner | Understand the starter lists, job checklists, eForms, quote content, PDF layouts and settings. |
| Project, safety and quality leads | Complete the remaining configuration and check the first representative job. |

Guide edition: 20 November 2026 | New Zealand and Australia options

Use this copy for Building Construction. The installer may load shared catalogues for other industries too. The licence, installed modules, company scope and user role determine what each person can use.

This guide describes the shipped customer setup. It is not proof that your environment has completed installation acceptance, or that a starter template has been approved for your work.

01 / INSTALLATION SEQUENCE

# Start here

There are two setup stages. Run the installer first. Then use Industry Packs to preview and apply the starting records for your company. Selecting an industry is not a replacement for installing the software.

| Stage | What happens | Your completion check |
|---|---|---|
| 1 - Software installation | Creates the jobs database on a new installation, installs standard Odoo apps and the delivered JobLink modules, then starts JobLink. | Installation finishes successfully and the login page opens. |
| 2 - Industry pack selection | Recognises existing starter records, adds missing applicable items, fills selected defaults, enables matching checklist auto-pick and prepares eligible PDF presentation defaults. | Add completes, Pack Log is available and remaining to-dos are assigned. |
| 3 - Customer configuration | You enter real people, rates, calendars, scopes, evidence and connections and review business content. | A representative job and user workflow are checked before real use. |

## Before you begin

- Use the complete customer folder supplied for your release, on the agreed Mac or Linux Docker host. Ask your installer about another platform.

- Have Docker running, image-download access, an available application address/port and storage for the database, attachments and backups.

- Nominate the administrator, legal company and branches. Prepare the legal name, address, country, NZBN/ABN as applicable, GST/tax identifier and logo.

- Know which industry, operating countries and Australian states/territories you actually offer. Have your licence and support contact available.

Page guide: install 3; select and apply 4-5; starter records and forms 6-9; QC 10-11; quoting 12; PDF layouts 13; users 14; defaults 15; first job 16; customer setup 17; handover 18; quick reference 19.

For an existing installation, use the supplier-approved update process and backup plan. The first-install instructions below are for a new customer environment.

02 / INSTALLATION ADMINISTRATOR

# Install the new customer system

## 1. Open the delivered customer folder

Copy the complete customer package to the agreed host. Open Terminal in that folder. Use your actual folder path in the example below.

```
cd '/path/to/your/customer-folder'
bash setup.sh
```

The script checks Docker, prepares missing configuration files, generates passwords for placeholder configuration, pulls the images, starts PostgreSQL, creates jobs with standard apps and runs the JobLink module installer. Keep the terminal output until it finishes. Do not close it halfway through.

## 2. Open JobLink

For the supplied local setup, open http://localhost:8069. Remote customers use the application address supplied by their installer; localhost refers to the computer running the browser.

## 3. Secure the first administrator

The delivered fresh-install instructions show admin / admin for the new database. Change that bootstrap password immediately. An already-configured customer system may have different credentials; use the account handed over to you.

## 4. Activate your customer licence

Open Settings > SourcNZ Licence. Give the Database ID to your authorised supplier, enter the issued key and choose Activate Key. Check your entitlement before treating a locked module as an installation failure.

## 5. Complete the host handover

Have the installer confirm backups, recovery ownership, HTTPS for remote/mobile use and the supplied live-server access settings. The first-run script loads English (en_AU); user language, timezone and working calendar still need checking for your actual business.

If installation fails: retain install.log and the exact error time, and contact implementation support. Share sanitised diagnostics; do not send password files or licence secrets as routine attachments. Do not treat a partially finished install as ready.

03 / INDUSTRY PACKS SETUP

# Select your company and industry

Sign in as a Settings administrator and select the correct company in the company switcher. Open Settings > JobLink > Industry Packs. The wizard is called Industry Packs Setup.

| Field | What to enter |
|---|---|
| Company | The actual legal company or intended branch you are configuring. Confirm this before continuing. |
| Company name, address and logo | Your real legal identity and document branding. Replace placeholders; a missing logo can display the company name. |
| Legal company country | The country of the legal entity. This is separate from the places where the crew will work. |
| NZBN / ABN and GST Number (NZ) | Use the correct identifiers for that entity. Number-format validation is not registration verification. |
| Licence Numbers on Documents | Only actual current business licence references that should appear on documents. |
| Industries | Building Construction. Tick other industries only if the same company genuinely offers them. |
| Works In | New Zealand, Australia, or New Zealand and Australia. Choose actual operating scope. |
| AU States / Territories | If Australia is selected, choose the actual states/territories. This is required for Preview. |

Choose Next: Preview. This reads the current catalogue and does not save your company edits. Use Back to amend the choices. Add is the step that saves the entered company details and applies the pack.

For NZ-only operation, choose New Zealand even when the installer language is en_AU. Choosing both operating countries does not create a second company, change an employee employment agreement or connect a second accounting ledger.

04 / PREVIEW, ADD AND PACK LOG

# Read the preview, then apply

| Preview status | Meaning and action |
|---|---|
| Will be added | Missing applicable record, eligible default or enabled switch is proposed. Review the item and its scope. |
| Already there | A matching record, previous addition or applicable existing value was found. It is not a promise that its contents have been approved. |
| Module locked by licence | The item is skipped. Check your purchased entitlement with the administrator/supplier. |
| Module not installed | A required model or module is unavailable. The industry tick does not install it automatically. |
| To do (you) | A review/configuration reminder is scheduled, rather than an approved setting or completed control. |

## 1. Review the proposal

Check the company, industry and country/state scope of each row. Some lists ship during installation, so a new customer can legitimately see many Already there rows. Read PDF Layouts readiness separately from item counts.

## 2. Choose Add

The wizard applies applicable records/defaults and creates a Pack Log. A provider error rolls back the setup operation and should be repaired before retrying; do not work around an error by broadening access.

## 3. Check the Pack Log and To-do

Choose View Pack Log, or use Settings > JobLink > Pack Log. It records the company, user, scope and added/skipped/to-do results. Open the administrator To-do activities and allocate the remaining customer work to real owners.

## First users and Done

After Add, enter each initial user name, email and explicit role. If appropriate, enter an approved second administrator. Choose Invite and Continue, or Skip and create users later. Invitations need working outbound email. An existing login email is not overwritten by this step; review that account separately. Done lists recommendations and still-to-set-up items. Install recommended modules only after the implementation administrator confirms scope and dependencies.

05 / SELECTION ADDS OR RECOGNISES THESE ITEMS

# The starting records for your industry

## Disciplines / job types

Rigging / Scaffolding; Electrical; Plumbing / Gasfitting / Drainage; HVAC / Refrigeration; Carpentry / Joinery; Painting / Decorating; Building - Residential; Building - Commercial; Civil / Earthworks; Concreting; Roofing; Plastering / Linings; Tiling / Flooring; Glazing; Fire Protection; Demolition; Landscaping.

## Skills / trade definitions

Rigger; Scaffolder; Coatings Applicator / Blaster; Electrician; Plumber; Gasfitter; Drainlayer; Fire Protection Technician; Carpenter; Painter; Apprentice; Builder; Concreter; Roofer; Plasterer; Tiler; Glazier; Labourer; Site Manager; Demolition Worker; Civil Plant Operator; Landscaper.

## Basic job checklist template

Building Job - NZ; Building Job - AU. These basic checklists are separate from the country-specific compliance checklist on the next page. Selecting the pack does not create customer jobs, employee evidence or crew assignments.

## Document-library folders

Consents & Inspections (NZ); Producer Statements & Records of Work (NZ); Permits & Approvals (AU); Home Warranty & Insurance (AU); Plans & Specifications. Only folders applicable to the selected operating countries are offered. These are library categories/folders, not automatic external cloud connections.

## Health & Safety inspection templates

Excavation & Trench Inspection; Asbestos Check Before Work; Take 2.

## Common installed catalogues

The installer also loads shared activity codes, roles, base document/report templates, asset categories and country catalogues. Country-filtered ticket definitions are offered by the Workforce pack. Review the actual issuer, scope and employee evidence: a ticket type in a list is not an employee qualification.

STARTER DIRECTORY / ADDITIONAL RECORDS

# Other templates and specialist lists

## Quotation content and pre-quote surveys

The module installs the country quotation templates and shared quotation documents before you select the industry. New disciplines may link an existing matching quote document and pre-quote survey; existing matched disciplines are not recreated to force a new link. Check the actual selected document and survey on the discipline.

Most building/civil disciplines can link to Civil, Building & Demolition Works Quotation / Building & Civil Pre-quote Survey. Rigging / Scaffolding, Electrical and Painting / Decorating can link to their existing specialist quote/survey pairs. Review the actual links rather than assuming every discipline has unique new content.

## Building asset class definitions

Building services: HVAC unit, Hot water system, Backflow preventer, Fire alarm panel, Emergency lighting and Distribution board. Building elements: Roof, Facade / cladding, Structure, Lift / escalator, Fire sprinklers, and Doors and hardware. Record actual customer/property assets separately.

## Certificate-type entries

NZ selection offers Producer Statement - Construction Review (PS4), Code Compliance Certificate (CCC), and Certificate of Work (LBP design). AU entries are filtered to the selected states: Occupation Certificate (NSW); Occupancy Permit (VIC); Final Inspection Certificate / Certificate of Classification (QLD); and Building Completion / Occupancy Certificate for WA/SA/TAS/ACT/NT. These are tracking definitions, not issued certificates or proof of current legal applicability.

## Quote standard references

NZS 3604 (NZ); NZS 4229 (NZ); NZS 3910 (NZ); NZS 4541 (NZ); NZS 4219 (NZ); AS 1684 (AU); AS 3600 (AU); AS 2870 (AU); AS 3740 (AU); AS 4000 (AU); AS/NZS 1170 (NZ/AU). Only selected-country entries are offered. These catalogue references do not select the approved edition, provide a purchased standard or establish that it applies to the job.

06 / TEMPLATE CONTENT AND AUTOMATIC PICKING

# Your job checklist and eForms

Selecting Building Construction enables Pick automatically on the installed Building Construction - NZ and/or Building Construction - AU checklist, for the operating countries you chose. The original template names display a dash between industry and country. Required content and rules still need review and approval.

| Starter checklist item | When | Starter requirement |
|---|---|---|
| Construction site induction done | Before start | Required; blocks clock-in |
| SWMS / task analysis for the work | Before start | Required; blocks clock-in |
| Asbestos check | Before start | Required |
| Daily site safety walk | During | Required |
| Scaffold inspection (if required) | During | Optional starter |
| Plant pre-start (if required) | During | Optional starter |
| Stage inspections passed | Before completion | Required; inspection records |
| Trade certificates collected | Before completion | Required; received certificates |
| Final stage - building records | Before completion | Required |
| Work completed to scope - Practical Completion | Before completion | Required |
| Customer sign-off | Handover | Required |

A new job with no manual checklist choice can pick a matching enabled template when its actual work context resolves. Set the job work site/country and industry or discipline first. Mixed or missing scope can prevent a safe automatic choice. Starting records are not a completed induction, permit, inspection or signature.

07 / EFORMS, RULES AND BLOCKERS

# Prepare form content before crew use

## 1. Review rules for the actual work

Open Jobs/Projects > Configuration > Compliance rules. Review the jurisdiction, effective dates, source wording, acceptance policy and responsible people. The installed application may display Jobs or Projects as its root name.

## 2. Review the forms and checklists

Use Joblink eForms > eForms, Form Designer or Build an eForm with an authorised designer. Review wording, required answers, visible questions, attachments, signatures, critical answers and the intended job scope. Manage the checklist at Jobs/Projects > Configuration > Job Checklists.

## 3. Refresh wording and approve content

After approving the applicable rules, use Refresh wording from rules and Approve content on the compliance forms. Enabling automatic checklist picking does not perform this approval. Verify the expected form opens from each checklist line; certificate and inspection lines may use their own linked workflow.

## 4. Check one ordinary and one blocked case

Use a clearly labelled training job. Confirm that required unanswered/failed items remain visible and that critical failure keeps the applicable start/release block. Form submission, acceptance and durable PDF filing can be separate states; a completed form is not automatically a passed control.

Existing native eForms remain the crew entry point. This package does not activate OpnForm or Nextcloud. Do not promise those builder/file-editing workflows as part of selecting an industry pack.

## Sample data to recognise

The installed source includes SAMPLE - eForm walkthrough and sample customer/safety content. It demonstrates a failed critical control and a clock-in block. Keep demonstration records separate from operational jobs. Review or archive unused starter content through the administrator rather than using it as signed business evidence.

08 / DRAFT REFERENCE FAMILIES

# Quality trade-pack library

The installer ships draft QC library records, including the following 18 reference families relevant to Building Construction. These records are already in the catalogue before industry selection; the setup pack adds review reminders, not blanket approval.

| Reference families | Reference families |
|---|---|
| 01 Structural steel erection and bolting | 10 Waterproofing membranes and wet areas |
| 02 Civil earthworks and site preparation | 11 Windows glazing and external doors |
| 03 Excavation trenching and temporary works | 12 Insulation plasterboard and internal linings |
| 04 Concrete formwork placement and curing | 13 Passive fire protection and penetrations |
| 05 Reinforcing steel and embedded items | 14 Interior fitout tiling flooring and joinery |
| 06 Carpentry and timber framing | 15 Scaffolding access and work at height |
| 07 Light steel framing and metal systems | 16 Demolition and deconstruction |
| 08 Masonry brickwork and blockwork | 17 Asbestos and hazardous-material remediation |
| 09 Roofing cladding and external envelope | 18 General building construction and final handover |

## Country and location

This customer QC library/resolver includes NZ and the AU profiles VIC, WA, QLD, NSW, SA and ACT. It does not provide TAS, NT or Commonwealth operational QC coverage. Other form rules or public-holiday calendars do not extend that QC coverage. Have unsupported or unresolved scopes reviewed before offering the work.

A job may need more than one appropriate pack. Family groupings are a starting directory, not an approved scope of practice. Draft families are references to prepare, not approved engineering methods or licences. Use the correct actual work site, real adopted standard edition/source, design/OEM criteria, acceptance limits, sampling and evidence requirements. A template name containing a standard is not the licensed standard or a compliance certificate.

09 / PEOPLE, SITE AND APPROVAL

# Set up QC for an actual job

## 1. Appoint the real competent reviewers

The administrator records Reviewer appointments and, where required, Quality operation appointments under Quality Control > Administration. Use actual company, jurisdiction, competence/independence, effective dates and evidence. Assigning a Quality role or PDF Publisher group does not create an appointment.

## 2. Review requirements and activate the relevant pack

Open Quality Control > Planning > Requirements and Industry Templates. Review the relevant draft pack and its requirements, replace draft placeholders, select real source editions and record the review evidence. An authorised reviewer uses Review and activate after the actual prerequisites are met.

## 3. Set the job scope and choose the reviewed pack

On the job, open Quality scope. Enter Quality work site and resolve missing/mixed site scope. Use work-scope keywords/disciplines and Refresh suggestions. Suggestions are advisory; draft candidates need review. Confirm the relevant reviewed pack and use Apply to job > Create draft plan.

## 4. Review the plan, then perform the work

The new plan remains draft until its own approval. Record actual inspections/tests, competencies, calibration and required evidence. Plan approval is separate from accepting tests, technical issue or work release. Critical/unresolved controls keep their applicable blocks.

## QC Required (ITP, MDR)

This option is on the tender/quote where those deliverables are required. Selecting an industry does not tick it on every job. It is not a universal switch that disables independent permit, safety or configured quality controls. Confirm deliverables and the applicable plan on each job.

10 / PRICING OWNER

# Quote content, products and rates

The installer ships Building Construction (New Zealand) and Building Construction (Australia) quotation templates. These are business-content templates, separate from PDF presentation revisions. Choose the applicable country template on the quote; standard references do not replace project-specific scope or contract review.

| New product code | Starter quoting item |
|---|---|
| LAB-RIG | Labour - Rigger (per hour) |
| LAB-ELEC | Labour - Electrician (per hour) |
| LAB-PLUMB | Labour - Plumber / gasfitter (per hour) |
| LAB-CARP | Labour - Carpenter (per hour) |
| LAB-LAB | Labour - Labourer (per hour) |
| LAB-APP | Labour - Apprentice (per hour) |
| HIRE-CRANE | Crane hire (per hour) |
| HIRE-EWP | EWP hire (per day) |
| HIRE-SCAF | Scaffold hire |
| HIRE-SKIP | Skip bin |

## Company Schedule of Rates entries

Crane hire (per hour); EWP hire (per day); Scaffold hire (per week); Skip bin (per bin).

New pack quote products and rate-card amounts start at 0. Enter and approve your own selling rates before sending a quote. Existing matching records keep their values. A hire-named service product does not create a physical asset booking or stock item.

## Quote document content

Shipped quotation documents relevant to this work include Civil, Building & Demolition Works Quotation; Structural Steel, Welding & Fabrication Quotation; Rigging, Scaffolding & Access Quotation; Protective Coatings Quotation; Electrical & Instrumentation Works Quotation. Review inclusions, exclusions, conditions and scope on Sales > Configuration > Quote Documents. The discipline links and actual document choice must suit the quoted work.

11 / DOCUMENT OWNER AND ADMINISTRATOR

# PDF layouts and report readiness

Industry-pack Add can prepare eligible factory presentation defaults for the selected legal company/countries: a branding record, published factory revisions and bindings, where missing and permitted. It never prints, files or issues a report just because the setup finishes.

| Report area | What you should find and check |
|---|---|
| Shared reports | Job Completion Report; Job Close-out (internal); eForm; Inspection Report; quote/order/invoice and other installed commercial/safety reports. Check each report owner is installed and licensed. |
| Building Construction report examples | Retention Money Statement; Disclosure Statement (NZ residential); Record of Work. |
| Business content versus styling | PDF Layouts changes supported presentation. Quote Documents, eForm questions/checklists and QC requirements are separate content and approval workflows. |

Use PDF Layouts > Report Catalogue. It is initially grouped by Module; use the Building Construction filter or Shared across industries. A shared report is not a different industry-specific document just because it appears in several filters. Open Reports and Sample Previews from setup to review an accessible real sample.

| Readiness result | What to do |
|---|---|
| ready | Factory presentation is installed; check the actual sample, business data and source permissions. |
| details_missing | Complete legal company details. Commercial/register layouts need address; accounting needs tax identity. |
| approval_required | Review bindings, parent-company defaults or controlled/business approval requirements. |
| module_unavailable | Resolve the missing or licence-locked owner/adapter with the administrator. |
| adapter_pending | Use the original report workflow; a supported accepted styling/preview adapter is not available. |

Branches inherit legal-company defaults. Run missing default setup on the legal company; branch setup does not create parent branding/bindings. No logo uses a company-name fallback. This customer selection does not include the optional controlled QC PDF theme/issued-document bridge. Do not infer it from a catalogue label.

12 / ACCESS AND RESPONSIBILITIES

# Assign users and control PDF changes

Create or invite the real users, then review Settings > Users & Companies > Users > Access Rights > User Role. Industry selection creates/matches role definitions; it does not allocate every person to an industry role. A user has a primary managed User Role; PDF permissions are additional access levels, not multiple primary job roles.

| Role group for Building Construction | Customer assignment |
|---|---|
| Project Manager; Supervisor; Tradesperson / Field; Contractor | Use the industry-prefixed roles for the people doing this work. Confirm allowed company/branch and job scope. |
| Site Manager; Contracts Administrator / QS. | Specialist coordination/management roles for this industry, where needed. |
| Estimator; Apprentice / Labourer; QA/QC Inspector; QA/QC Manager; H&S Advisor; H&S Manager | The pack offers industry-prefixed specialist roles. Review the actual rights before assigning. |
| Quality Reader / Requirement Author / Inspector / Requirement Reviewer / Safety Reviewer / Quality Manager | Specialist Quality roles are available independently of operational job roles. Real authority/competence and appointments remain separate. |
| Shared administration and stores roles | Administrator, Branch Manager, Office Admin, Reception and Storeman remain available where licensed. Give payroll/private evidence access only to the responsible staff. |

## PDF access starts from the standard role mappings

Project Manager: Viewer. Office Admin: Designer. Branch Manager: Publisher. Settings administrators have combined Designer and Publisher access. Engineering Workshop Manager and Building Contracts Administrator / QS also have Viewer. These mappings add rights to role definitions; they do not assign staff automatically.

To customise: a Designer creates New draft, edits it, uses Draft preview and chooses Submit for review. A different eligible Publisher reviews and chooses Publish company default. Even an account with both permissions cannot publish its own contributed revision. Publishing replaces non-branch company defaults for that report; review country/branch effects first. Published/retired history cannot be edited.

13 / DEFAULTS AND CUSTOMER DECISIONS

# Settings to review after Add

| Setting / starter | What is loaded or proposed | Your review |
|---|---|---|
| Confirmed-quote job creation | Enabled by module default and pack. | A confirmed/accepted quote can create a job. Confirm the intended job template and approval flow. |
| Checklist lead time | Pack requests 7 working days. | Check the actual working calendar and desired notice. |
| Retention / defects | Fresh module defaults: 5% / 12 months; Building pack does not reset existing values. | These are software defaults, not mandatory legal/contract terms. Confirm each contract. |
| Vendor controls | Pack requests 30-day insurance warning and vendor-bill warning enabled. | Add actual vendor evidence, terms and responsible owner. |
| Quote approval threshold | Shipped company default: 5,000 untaxed in company currency. | Set the approved business threshold and independent approvers. |
| Payroll and rates | Starter pay-code/agreement catalogues; new quote/rate amounts can be zero; some activity costs are samples. | Use approved employment terms, real cost/sell rates, leave/calendar setup and reviewed classifications. |

## Industry pay codes

LEAD - Leading hand allowance; SITE - Site allowance (building); INCL - Inclement weather time (AU); WETW - Wet weather time (NZ); FARE - Fares and travel allowance.

The codes define categories, not approved allowance amounts or payroll filing. Payroll exports are a handoff to your approved provider. Installed agreement names include NZ Trades (generic starter), AU Manufacturing Award MA000010 (starter) and AU Building & Construction On-site Award MA000020 (starter); your payroll owner determines the applicable agreement and current rules.

Re-running matters: blank/false/zero or original-default settings may be filled again. Deliberately disabled auto-create or vendor-bill warning can be turned on. Recheck these settings after any Add. Existing non-default custom values are generally retained.

14 / PROJECT MANAGER AND CREW LEAD

# Create the first representative job

A building project from site establishment to handover. Use a clearly labelled training/acceptance job before entering operational work. The pack adds starting lists; it does not build the WBS, crew, tasks or timesheets for you.

## 1. Set the real job context

Record the property, actual consent/permit and design dates, building pathway/edition and local variations. Plan stage inspections, competent people, drawing revisions and handover evidence for this project. Enter the correct company/branch, customer, actual work site, country/state, timezone and discipline. Align the separate Quality work site if QC is used.

## 2. Build and assign the work

Create the WBS structure and executable activities/tasks for the actual scope. Link each activity to its task and assign real crew, dates and required skills. A package is a grouping level; crew allocation at a package does not replace checking the linked task and employee assignment.

Building stage catalogue: SE Site establishment; FDN Foundations; SLAB Floor slab; FRM Framing; ROOF Roof on / closed in; SVC Services rough-in; LIN Linings; FIT Fit-off; FIN Final inspection; HO Handover. These are stage definitions; they do not create a populated WBS or passed statutory inspections.

## 3. Confirm forms and controls

Verify the correct industry/country checklist, approved form content, permits, inductions and applicable QC. A start block should identify outstanding requirements; obtain genuine evidence or the authorised reviewed disposition rather than treating form completion as a blanket release.

Examples from the shared installed Activity Codes catalogue: INS Insulation / cladding; EXCV Excavation and earthworks; FORM Formwork; CONC Concrete place and finish; REO Reinforcement fixing; FRAM Framing and structure. Review their category, billable flag and any starter costs before use.

## 4. Test time capture and reporting

Use a staff account linked to the correct employee. Select the assigned job/task and activity; confirm required WBS dimensions and rates. Record a small test entry, have the correct approver review it, and compare job/WBS costs and the intended PDF output. Confirm time can be finished/captured for work already done without authorising a new unsafe start.

15 / ITEMS NOT SUPPLIED BY THE INDUSTRY TICK

# Complete the customer setup

| Owner | Complete before operational use |
|---|---|
| Company administrator | Real legal identity, logo, tax/business identifiers, bank/payment details, branches, legal-parent/branch relationships, user access and licence scope. |
| Workforce / payroll owner | Users linked to employee profiles; approver/branch; actual skills/ticket evidence; pay company/agreement, employment rules, base/cost rates and effective calendar. |
| Commercial / accounting owner | Selling prices, quote conditions/approval, retention and claims basis, tax/account mapping and the agreed accounting system. Country Setup (NZ / AU) is a separate administrator workflow; selecting industry does not load a chart automatically. |
| Safety / quality leads | Actual work scopes, locally applicable rules, approved form content and QC requirements, verified appointments, competent people and equipment evidence. |
| Document owner | Correct supported branding, legal company identity and sample PDFs; independent publication for customer layout changes. Future revisions do not rewrite previously issued evidence. |
| Installer / service owners | Backups and a restore check; application address/HTTPS; outbound email, mobile registration, SSO and any accounting/delivery/document connector actually purchased. |

## Starter cleanup

Rename the Head Office/pay-company and branch placeholders to your business; archive unused branches, old example inductions and sample jobs only after checking their links. Select and verify the correct work calendar and holiday region/year coverage. Installed names include NZ Standard 40 hours/week, NZ AUK, and AU NSW/VIC/QLD/WA/SA/TAS/ACT/NT; choosing an industry does not assign the correct employment calendar for you. Review every prefilled cost/rate, not only blank or zero fields. Do not replace genuine history with new starter values.

## Select only services you will use

MYOB/Xero credentials, account/GST mappings, remote document permissions, mail/mobile settings and provider acknowledgements remain customer work. A connector module in the package is not a connected service. Native eForms are included; optional OpnForm/Nextcloud activation is outside this guide.

16 / CUSTOMER ACCEPTANCE RECORD

# Check your first-install handover

Record the owner and date for each check. A tick means you checked your own installation, not that the pack supplied the evidence for you.

| Check | Expected evidence | Owner / date |
|---|---|---|
| Installation and licence | Login works; expected apps are available for the purchased entitlement. | _____ _____ |
| Company and pack scope | Correct legal country, company/branch, Building Construction, operating countries and AU states saved. | _____ _____ |
| Pack Log and To-do | No unresolved provider error; every locked/missing/to-do item reviewed and allocated. | _____ _____ |
| Users and workforce | Field and manager accounts see the correct company/jobs; employee links, skills and approvers checked. | _____ _____ |
| Rates and commercial settings | No unreviewed zero/sample prices, activity costs or default contract terms used. | _____ _____ |
| Forms and QC | Content/rules reviewed; actual competent appointments and evidence recorded where required. | _____ _____ |
| First job and time | Actual scope resolves, expected checklist loads, assigned crew can use the intended tasks and approver can review time. | _____ _____ |
| Negative case | Unanswered/critical failure or missing authority produces the expected block, without inventing a pass. | _____ _____ |
| PDF outputs | Legal name, identifiers, header/footer, WBS Code/Path/Activity, progress, totals and long-page output checked where relevant. | _____ _____ |
| Connections and recovery | Only intended providers active; mail/mobile tested if used; backup and restore ownership confirmed. | _____ _____ |

Customer: _____ Industry setup owner: _____

Release/package reference: _____ Handover date: _____

17 / KEEP WITH YOUR CUSTOMER SETUP

# Quick reference and later changes

| Where to go | What to check |
|---|---|
| Settings > JobLink > Industry Packs / Pack Log | Selected scope, Preview/Add, item status and who applied the pack. |
| Jobs/Projects > Configuration > Job Checklists / Compliance rules | Checklist template, automatic picking, required items and applicable rule approval. |
| Joblink eForms > eForms / Form Designer / eForm Reports | Native form questions, content and form-report templates. Access depends on designer rights. |
| Quality Control > Planning / Administration | Industry templates, requirements, job plans and real reviewer/operation appointments. |
| PDF Layouts > Report Catalogue / Company Branding / Revisions / Published Bindings | Presentation readiness, sample preview, draft/review/publication and active selection. |
| Sales > Configuration > Quote Documents / Schedule of Rates | Quote wording and company selling rates. |
| Jobs/Projects > Configuration > Activity Codes | Activity categories, skill links, billable flags and real cost assumptions. |

## Common questions

Nothing new was added? Existing or previously added records can legitimately be recognised. Check scope and Pack Log before adding duplicates. No matching checklist? Set actual site/industry/country, check auto-pick and licensing, or choose the reviewed template explicitly.

Adding another industry later? Run Preview/Add again and review the union of content. Removing a tick does not remove old lists or switch off previous checklist flags. Adding Building after Engineering/Trades does not automatically restore retention/defects defaults. Recheck settings and current job templates.

Missing/wrong PDF? Check the source company, legal parent, report owner/adapter, readiness and active published bindings. Rerunning Add is not Restore Factory Defaults; existing/archived or opted-out defaults are not silently recreated. Ask an authorised Publisher to review the layout selection.

For support, provide the release reference, company/industry selection, Pack Log item, affected menu/report and sanitised error. Do not include passwords, private employee records or full secret configuration files.

Guide basis: customer package source reviewed 20 November 2026; 72 selected modules including the QC Workforce bridge. Menus and counts vary with licence, installed modules and existing data. Steps describe source behavior; your handover checks establish what actually works in your environment. No application settings were changed to produce this guide.