Trades

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.

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Use this copy for Trades. 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	Trades. 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

Electrical; Plumbing / Gasfitting / Drainage; HVAC / Refrigeration; Carpentry / Joinery; Painting / Decorating; Fire Protection.

Skills / trade definitions

Electrician; Plumber; Gasfitter; Drainlayer; HVAC / Refrigeration Technician; Fire Protection Technician; Carpenter; Painter; Apprentice.

Basic job checklist template

Trade Service / Install Job. 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

Compliance Certificates & Test Results; 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

Electrical & Gas Safety Check; 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.

Electrical can link to Electrical & Instrumentation Works Quotation / Electrical & Instrumentation Pre-quote Survey. Painting / Decorating can link to the Protective Coatings pair. Plumbing / Gasfitting / Drainage, HVAC / Refrigeration, Carpentry / Joinery and Fire Protection match Civil, Building & Demolition Works Quotation / Building & Civil Pre-quote Survey in the shipped map. Review that generic wording for the actual trade before sending it.

Building services asset classes

The pack offers Building services with HVAC unit, Hot water system, Backflow preventer, Fire alarm panel, Emergency lighting and Distribution board. These are categories, not your customers' real assets or proof of an inspection.

Trade evidence and vans

Country and selected-state ticket definitions include relevant electrical/plumbing/gas, refrigerant handling, work-at-height, first-aid and other types. Review issuer/name and expiry on the real evidence; some definitions are marked draft. Service-van setup reminders do not create vans, tool stock or accepted vehicle checks.

Quote standard references

NZS 4541 (NZ); NZS 4219 (NZ). 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 Trades enables Pick automatically on the installed Trades - NZ and/or Trades - 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
Site induction done	Before start	Required; blocks clock-in
Take 2 before the task	Before start	Required
Testing / compliance certificate issued	Before completion	Required; certificate workflow
Test and tag record (if required)	Before completion	Optional starter
Work completed to scope - Practical Completion	Before completion	Required
Customer sign-off	Handover	Required

AU variant: also includes SWMS for high-risk construction work before start as an optional starter line. Optional in a starter list does not mean it can be omitted where the actual work requires it.

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 16 reference families relevant to Trades. These records are already in the catalogue before industry selection; the setup pack adds review reminders, not blanket approval.

Reference families	Reference families
01 Welding and metal fabrication	09 Battery energy storage systems
02 Non-destructive testing and inspection	10 Fire detection alarms and emergency lighting
03 Protective coatings and corrosion control	11 Data communications and structured cabling
04 Electrical installation and industrial maintenance	12 Water services and backflow prevention
05 Electrical equipment inspection testing and tagging	13 Sanitary plumbing sewer and drainage
06 Switchboards and control panels	14 Stormwater drainage and surface water
07 Instrumentation automation and controls	15 Gasfitting and gas installations
08 Solar photovoltaic installations	16 Fire water hydrants sprinklers and pumps

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 Trades (New Zealand) and Trades (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-ELEC	Labour - Electrician (per hour)
LAB-PLUMB	Labour - Plumber / gasfitter (per hour)
LAB-CARP	Labour - Carpenter (per hour)
LAB-APP	Labour - Apprentice (per hour)
HIRE-EWP	EWP hire (per day)
CALLOUT	Call-out fee

Company Schedule of Rates entries

Call-out (first hour) (per call-out); After-hours labour (per hour); EWP hire (per day).

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 Electrical & Instrumentation Works Quotation; Piping & Pressure Equipment Quotation; Civil, Building & Demolition 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.
Trades report examples	Service Report; Van Restock Summary.
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 Trades 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 Trades	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.
Service Coordinator / Dispatcher.	Specialist coordination/management roles for this industry, where needed.
Estimator; Apprentice; 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	Pack requests no retention (0%) / 3-month defects period when Building is not selected.	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

CONFSP - Confined space allowance; LEAD - Leading hand allowance; 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 customer service or installation job. 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

Identify the actual trade, customer site, required person and business licences, service visit and testing/certificate deliverables. If a van is used, configure its stock, tools and readiness before dispatch. 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.

Engineering/Trades selection does not add a standard project WBS through the building-stage provider. Choose or prepare the structure for the actual job rather than expecting a generated task list.

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: GEN General labour; ELE Electrical; INSP Inspection / testing; TRV Travel; PLMB Plumbing and drainage; ELEC Electrical. 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, Trades, 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.