

# OrbitalSolutions

## ONBOARDING & IMPLEMENTATION



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# **BIGCHANGE STARTS HERE**

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May I personally thank you for choosing Orbital Solutions. Our success is built on our customers' successes and that's why we feel that the implementation and setup of the JobWatch system is so important to help you go live.

The following document outlines what will be achieved throughout the various stages of the implementation and setup. A comprehensive and seamless process is critical to a good start.

From my experience, it is vital that you get "up and running" as efficiently and effectively as possible, making small changes that will, over a period, result in a BigChange. By taking these small incremental steps, you will start reaping the significant benefits that JobWatch delivers.

I look forward to meeting you in person at some point in the future, if we haven't already done so.

**Kevin Davey**  
**Managing Director**  
**Orbital Solutions PTY LTD**

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# BIGCHANGE READY IN FOUR STEPS

## STEP 01

### PREPARATION

- We will introduce you to your dedicated implementation specialist and schedule a kick-off call.
- Behind the scenes, your JobWatch system will be setup ready for configuration to begin.
- Your login details and software licences will be provided.
- We will share templates with you to aid the population of data to JobWatch from your existing systems.
- Our Installations team will arrange convenient times with you for any required vehicle installations, such as vehicle tracking, tablets and cradles.

## STEP 02

### KICK-OFF

- Our kick-off call ensures we understand your business requirements and key objectives for the JobWatch system.
- We will discuss your current business processes and agree on the best configuration of your system.
- Each of our roles and responsibilities will be agreed with timescales in place for on-site setup and training.
- We will identify the key users and champions within your business who will be involved in the day to day running of the system.
- Agree the success criteria for implementation and a target date.

## STEP 03

### SETUP & CONFIGURATION

- During our meeting, we setup and configure your system together, going step by step through all the key areas of JobWatch.
- Training is delivered to all required departments at your office.
- Following the setup of core features, we highlight additional configurations for added efficiency and best practice.

## STEP 04

### GO LIVE & ENHANCEMENTS

- Through a series of calls and webinars, we will finalise your setup together.
- You are now ready for a 'Soft Launch' where you will start using core features for scheduling and completing jobs.
- Workflows, worksheets and finance elements will be finalised. These include invoicing and any additional areas used for accounting.
- Any bespoke reports ordered will be added at this stage.

“ Typically, we'll have your BigChange system fully setup and operational in eight weeks from the initial preparation and kick-off call ”

# What we cover during Setup & Configuration

Here's a comprehensive breakdown of what we will cover during the setup and configuration of your BigChange system...

## WEB USERS

Date Covered: 

- |                    |                            |
|--------------------|----------------------------|
| Creating new users | Creating new roles         |
| Assigning roles    | Specific user restrictions |

Our Action Points:

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## RESOURCES

Date Covered: 

- |   |  |
|---|--|
| Creating new mobile resources (user profiles) | Assistance from other resources                                  |
| Amending tablet login pins                    | Custom fields  |
| Creating Resource groups                      | Skills(creating and assigning)                                   |
| Different JobWatch settings                   | Linking to web users and different roles                         |
| Settings for Managers                         | Editing profiles, adding pictures, attachments and custom fields |
| Working hours and starting locations each day | Absences, types and assigning from a web user and tablet         |
| Overtime rates                                |  |

Our Action Points:

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## VEHICLES

Date Covered: 

- |   |                                  |
|---|----------------------------------|
| Creating new vehicles                   | Vehicle attributes               |
| Vehicle Groups                          | Maintenance activity dates       |
| Fixed resources and non-fixed resources | Attachments (documents)          |
| Costs (per mile and per day)            | Custom fields                    |
| CO2                                     | Importing fuel card transactions |

Our Action Points:

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## TIMESHEETS

Date Covered:



- Enforcement options
- Activities

- Reports
- Completing on tablet

Our Action Points:

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## EXPENSES

Date Covered:



- Creating expense groups and categories
- Creating expenses on the tablet; assigning to a job and general expenses

- Processing expenses from the website, including reports

Our Action Points:

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## FILE LIBRARY

Date Covered:



- Creating file/document groups

- Uploading documents with resource group permissions

Our Action Points:

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## JOB SETUP

Date Covered:



- Creating job types
- Job referencing
- Job cards
- Default job duration and worksheets
- Job categories
- Positive and negative results
- Job custom fields

- Device settings
- Job specific financials (rates and invoice items)
- Templates for alerts (e.g. when vehicle approaches) and line items
- Constraints (time, resource and vehicle)
- Automatic document sending (e.g. financial, job card, template)

Our Action Points:

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## JOB SCHEDULING

Date Covered: 

- Creating jobs
- Adding constraints, worksheets and attachments
- Grouping jobs
- Scheduling assistant
- Viewing the schedule
- Unscheduled jobs
- Routes
- Flags
- Job financial tab
- Creating and completing a job from the website (instead of tablet)

Our Action Points:

## TABLET WORKFLOWS

Date Covered: 

- Filling in timesheets (where applicable)
- Completing vehicle checks (where applicable)
- Creating jobs from tablet (where applicable)
- Different job views
- Accepting, driving to, starting and completing jobs
- Creating expenses (where applicable) and assigning them to jobs
- Adding flags to job (where applicable)
- Using stock/equipment
- Filling in worksheets
- Accessing file library
- Sending and replying to messages
- RoadCrew Help Button
- Driver Behaviour

Our Action Points:

## WORKSHEETS

Date Covered: 

- Creating worksheets
- Stages for completion; for back office, resource and booking site
- Question types
- Conditional branching

Our Action Points:

## CRM

Date Covered: 

- Creating contacts within CRM
- Groups
- Parent/Child relationships
- Custom fields (detail tab)
- Adding multiple people
- SLAs
- Contracts
- Sales opportunities (stages, probabilities, notes, jobs)
- Specific price lists for stock and jobs
- Notes (types, workflows, custom fields, email alerts, flags)
- Workflow of keeping track of notes and tasks
- Sending emails on mass, including for

Our Action Points:

## STOCK & EQUIPMENT

Date Covered: 

- Creating product categories
- Creating makes and models
- Difference between consumables and non-consumables
- Difference between stock and equipment
- Creating items of stock/equipment, their location and assigning to jobs
- Storing notes against equipment
- How to use stock and equipment on jobs from the tablet

Our Action Points:

## BOOKING SITE

Date Covered: 

- Standard booking site, and giving people access
- Customer specific booking sites
- Access options (view jobs, cancel jobs, print job cards, track resources, change settings, book jobs, set up alerts, view job

Our Action Points:

## FINANCIALS

Date Covered:



- Creating financial documents; Quote, Proforma, Invoice, Purchase Order, Credit Note, Delivery Note, Application For Payment
- Consolidating Invoices
- Adding items, predefined invoice items, stock and equipment
- Creating standalone documents
- Creating documents against jobs
- Creating documents against group jobs
- Sending documents and marking as paid
- Customer specific jobs, stock, equipment and predefined invoice item pricing
- VAT, Nominal and Department Codes
- Auto sending of invoices
- Linking with Sage, Xero or Quickbooks\*
- Downloading financial information and importing it into financial packages OR integration
- Accepting card payments with Judo Pay
- Reports and statement of accounts
- Financial document reference scheme

Our Action Points:

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## ALERTS

Date Covered:



- Standard alerts
- Setting up alerts that are automatically sent to customers
- How to create
- The most commonly used standard alerts
- Choose recipients
- Content of alerts

Our Action Points:

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## MAP

Date Covered:



- Territories
- Viewing vehicles, resources, stock and equipment
- Route planning
- Different icons

Our Action Points:

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\*only if paid for



## REPORTS

Date Covered:



Viewing reports

Scheduling for automatic sending

Our Action Points:

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## WHITE LABELLING

Date Covered:



Importance of setting up

Different options for white labelling

Our Action Points:

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## TEMPLATES

Date Covered:



Creating email templates (such as job confirmations and financial documents)

Different usages

Emails sent automatically based on job completion e.g. 'Customer satisfaction survey' (worksheet) assigned to job

Creating of 'template' including logo and footer

Our Action Points:

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## NOTES

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**HARDWARE**

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# TABLETS & VEHICLE INSTALLATIONS

During the preparation phase, a member of our vehicle installations team will contact you to discuss and schedule professional installation of any tracking units, tablet cradles or other telematics hardware.

If you have chosen tablet or smartphone lock-down software as part of your solution, this will also be agreed and actioned.

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# HELP & SUPPORT

The implementation process will involve learning a lot of new things, and we don't expect you to remember everything.

As an Orbital Solutions customer you have access to our RoadCrew customer service team that is available on-demand 24/7 to all users in your organisation.

Our product experts will be more than happy to help answer any questions you may have and can be contacted in a variety of ways which are listed below.

Email: [roadcrew@orbitalsolutions.com.au](mailto:roadcrew@orbitalsolutions.com.au)

Telephone: 1300 535 113

Via Website: [www.orbitalsolutions.com.au](http://www.orbitalsolutions.com.au)

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## RoadCrew