

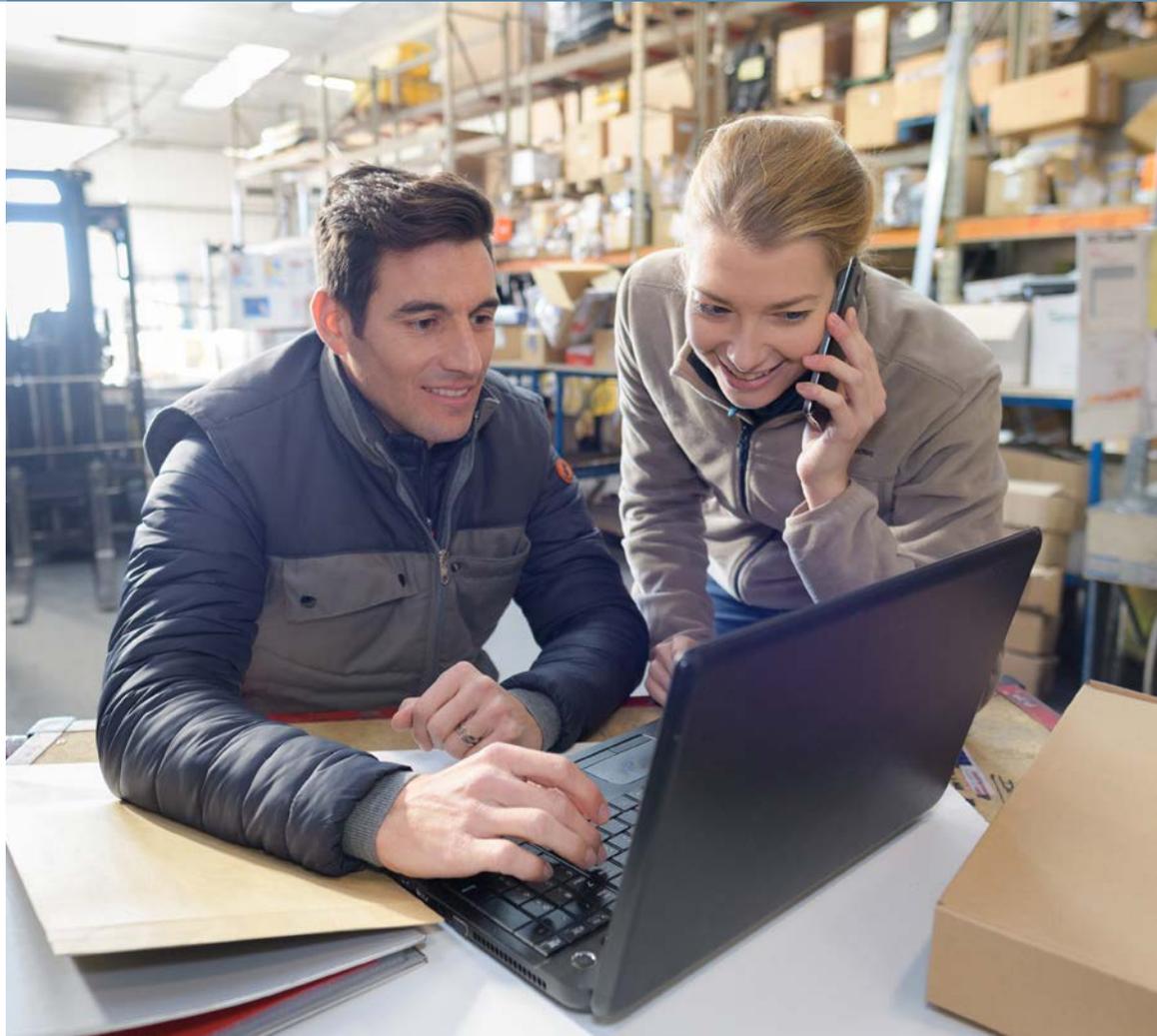
## An AIS Project Manager Tool

## AIS JobBoard for AccountMate

Stay on top of multiple jobs as they progress—when everything automatically rolls up into one dashboard, organized by project or job so you can view and make changes from any browser or phone.

### Access everything by job

- Sales quotes & orders
- Purchase orders
- Resource requirements
- Material allocations
- Labor allocations
- Documents
- Task management
- Scheduling
- Manufacturing
- Shipping
- Delivery
- Field installation
- Inspection



*If you manage customer orders by project or job, your team can use JobBoard to keep track from beginning to end, from sales quotes and orders to final inspections.*

**For companies that sell complex custom jobs that take weeks or months to design and implement**

- Professional Services Companies
- Custom Builders
- Made-to-Order Manufacturers
- Designers/Installers

# AIS JobBoard is your web-based project dashboard

## Manage your jobs from one place

- ▶ See the status of everything
- ▶ Find details and documents easily
- ▶ Catch problems early and automatically

## Handle all your jobs consistently

- ▶ Job Status Board
- ▶ Allocation & Management Board
- ▶ Activity Board
- ▶ Scheduling Board
- ▶ Shipping
- ▶ Delivery
- ▶ Installation
- ▶ Inspection
- ▶ Installer payment

## What AIS JobBoard is

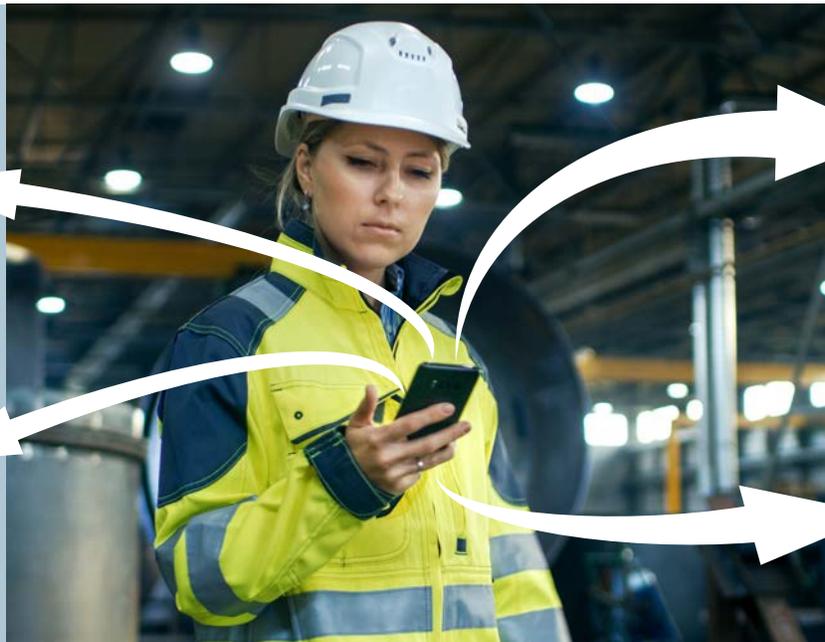
AIS JobBoard is a remote access, browser-based application that integrates with AccountMate to organize and display everything by job.

The ability to access this program on desktop or tablet devices creates efficiency for a quick-moving environment.

Quotes, order status, job allocations for manufacturing or distribution, scheduling, shipping, delivery, installation, inspection, and detailed activity are provided with an easy ability to click on things to drill down to the details when you need them.

The JobBoard dashboard is easy for your team to transition to.

The dashboard shows quotes, orders, jobs, and all documents related to them.



Allocations are color-coded to highlight changes in status.

The activity view shows specific project requirements, any documents related to the job.

## Key Features

- ▶ Customizable to fit any of your requirements. AIS JobBoard and AccountMate are both modifiable at the source code level, which means absolutely everything can be changed to align with how you want to run your business.
- ▶ Color coordinated projects, deadlines, and requirements make it easy to view and understand.
- ▶ Remote access on any machine via a browser tab means flexibility and no installation time.

## Example: AIS JobBoard Activity view

- ▶ The Basic version integrates with AccountMate Sales Orders and Activity data, including documents.
- ▶ From the Dashboard you can find the Activity View where you can see project requirements, activity, and related documents. You can view by job, customer, department, status, and person. The color changes automatically based on the status change.
- ▶ Views can be custom defined based on staff requirements.
- ▶ Filter by job, customer, department, or status.

Print											Show 10 entries
Search:											
	Action	SEQ#	Customer	Job	Company	JOB#	Date	Activity Type	Activity Status		
+		0	Glazer/Glenbrook	Glazer	Sandy Spring Builders	R06993.2.1	09-10-20		CLOSED		
+		0	Glazer/Glenbrook	Glazer	Sandy Spring Builders	R06993.2.1	09-24-20		ON-GOING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000017	10-05-20	REQ	PENDING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000017	10-05-20	REQ	ON-GOING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000017	10-13-20	REQ	PENDING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000017	10-14-20	DRAFTDES	PENDING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000017	10-14-20	SHIPDEL	PENDING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000017	10-15-20	REQ	PENDING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000038	11-13-20	REQ	PENDING		
+		0	EI-Hibri	Kandel Construction	Kandell Construction	1000000039	11-13-20	REQ	PENDING		

Previous
1
...
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...
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Next

## Example: AIS JobBoard Allocation view

- ▶ Under the allocation view, you can set shipping quantities per line item, as well as see all job activity and documents.
- ▶ The visibility under this function is labeled and easy to understand.
- ▶ You can add notes to each action item and highlight or bold important notes.
- ▶ View related purchase orders or work orders.

	Action	Customer	Job	Company	Delivery Date	Install Date	Order#	Status	Notes	Cust#	Contact/phone
+ 01-26-21											
+ 	 	Testing1	Testing1 alias address alias city , alias state , ALIAS ZIP	Testing1 alias address alias city , alias state , ALIAS ZIP	02-15-21	01-26-21	20040		Cabinetry per drawi 		first name last name
+ 03-19-21											
+ 	 	Testing1	Testing1 alias address alias city , alias state , ALIAS ZIP	Testing1 alias address alias city , alias state , ALIAS ZIP	03-12-21	03-19-21	20046				first name last name
+ 03-25-21											
+ 	 	Testing1	Testing1 alias address alias city , alias state , ALIAS ZIP	Testing1 alias address alias city , alias state , ALIAS ZIP	04-01-21	03-25-21	20051		scope of the project 		first name last name
+ 	 	Testing1	Testing1 alias address alias city , alias state , ALIAS ZIP	Testing1 alias address alias city , alias state , ALIAS ZIP	03-25-21	03-25-21	20052		scope of project 		first name last name

# Example: AIS JobBoard Scheduling view

- ▶ This is a dynamic calendar, providing efficiency when having multiple deadlines and requirements.
- ▶ Drag-and-drop jobs to change dates.
- ▶ When you click an item it opens up the order detail, providing contact information, job location, total amount, notes, request dates, and many more.

### Scheduling

From: 03/26/2021 To: 04/26/2021 Company:

View:

April 2021

W	Sun	Mon	Tue	Wed	Thu	Fri	Sat
13	28	29	30	31	1	2	3
		20052.1 (Testing1 )	20051 (Testing1 ) (scope of the project )				
14	4	5	6	7	8	9	10
			20040.1 (Testing1 )				
15	11	12	13	14	15	16	17

## Example: AIS JobBoard Shipping view

- ▶ The Shipping Dashboard gives truck loading crews the ability to confirm loads or instantly alert management to reallocate.
- ▶ Ship Orders generates packing slips and invoices. You will be ready for delivery quickly.
- ▶ Reallocate sends email alerts to team members with current allocations to push immediate reallocation solutions.

ais Logout

### Shipping Order

Date: 02/15/2021 Views: Select

Print

Search:

Item #	Item Description	Open Qty	Ship Qty
<b>Order Number : 8089</b> Due Date: Job Name: Grindler 10603 Dogwood Job Address: Grindler Residence Great Falls , VA , 20016 Job Contact/Phone: Grindler 10603 Dogwood			
8089	Moulding	Lineal feet of SM40/MBC42 basecap at 13/16" x 1-13/16"	150
8089	Moulding	Lineal feet of WM951/MM142SW ogee stop trim at 3/8" x	300
8089	Terms 1	Please review this quote carefully. We will not be res	1
8089	Terms 2	DRAWINGS: Drawings to be submitted to the customer or	1
<b>Order Number : 20040</b> Due Date: 02-15-21 Job Name: Testing1 Job Address: alias address alias city , alias state , ALIAS ZIP Job Contact/Phone: first name last name			
20040	CUSTCABA	Kitchen	1

Ship Orders Reallocate

## Be calmly, confidently in control of your projects at all times— and stop having to constantly react to surprises, problems, delays and yelling

AIS JobBoard lets you see and manage everything related to each job. Everyone on your team will know what's going on and can get to the information they need. It will be easy for people to make updates to projects, keep your customers updated, and to take action before issues turn into crises.

You'll be able to monitor resource use as you go, along with the related financial data, so you'll always have your finger on the pulse of projects and profitability. And the consistency that JobBoard brings to project management gives you the flexibility to say "yes" when an existing customer has a new request or your sales team brings in new business.

## AIS and AccountMate Integration

For over 30 years, AIS has been a founding Charter Member and Elite Solutions Provider for AccountMate, providing custom solutions integrating project management and accounting software seamlessly.



# AIS: A technology partner that lowers your cost and risk



AIS uses software to build a system that allows people to respond to what happens in their business in a way that's designed to be easily modified.

Our experts first listen to people at all levels of the company before designing a solution. They compare current processes to what they could be, mapping business pains to positive solutions. That assessment is the human part.

With this personalized assistance, plus flexible technology, companies can have their wish lists fulfilled. Low cost and high impact changes bring high-value benefits. You have more time to implement growth opportunities and explore what else your company is capable of.

Modular tools are available that snap-in, if and when they're needed. A flexible system lasts for decades. Many of our clients were burned by previous mid-tier or high-end solutions that cost them millions and never produced a positive result. With AIS, people soon discover that they can stop hesitating and start moving their business forward—and faster. Together we can quickly implement powerful changes and innovations with a very high return on your investment.

*People don't expect it, but once they see what's possible, they generate business ideas on a higher level. Let's start a conversation about your custom automation solution.*

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Please [click here](#) to  
schedule a 30-minute  
consultation with AIS