

# Neilon Job Management Deployment Guide

## Introduction

Neilon Job Management will allow customers to create & manage jobs and projects. Add various services for the jobs & add stakeholders who will be working on the jobs. Create & manage invoices for the jobs.

The Neilon Job Management application is available as a managed package that can be installed on an existing Salesforce installation.

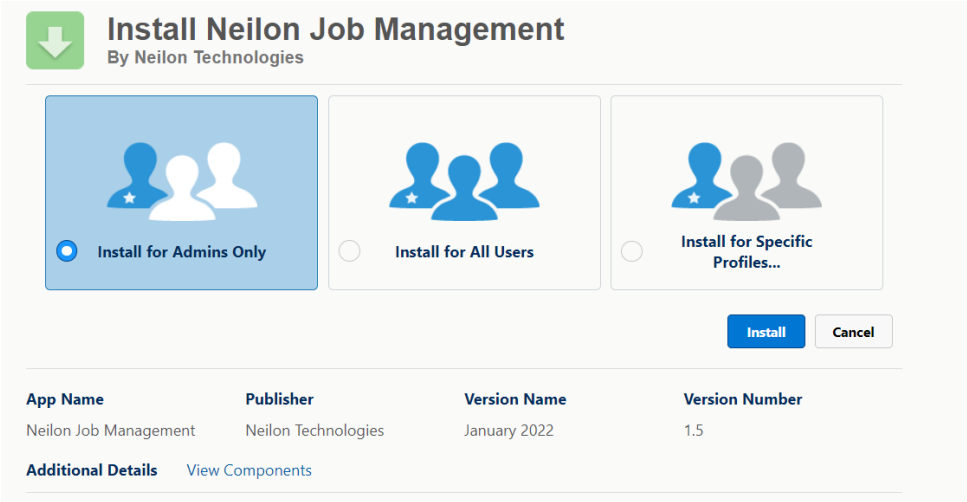
## Neilon Job Management deployment with new Salesforce installations

### 1. Installing the Neilon Job Management package

The Neilon Job Management application is installed as a managed package in an existing Salesforce installation. To start the Neilon Job Management installation, click on the URL provided by Neilon team and login in the org you want to install the package

Salesforce provides single step installation. Before clicking on Install, follow the steps given below.

1. Enter the password (if you have been provided)



2. Select option **Install for Admin Only**

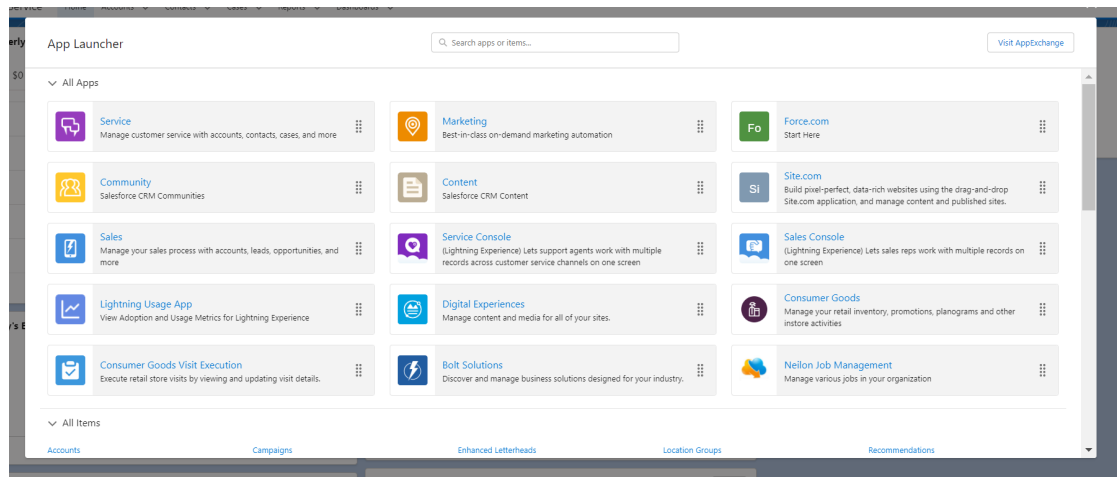
### 3. Click **Install**

The installation will take a few minutes to complete. Once the installation is finished, you will receive a confirmation email.

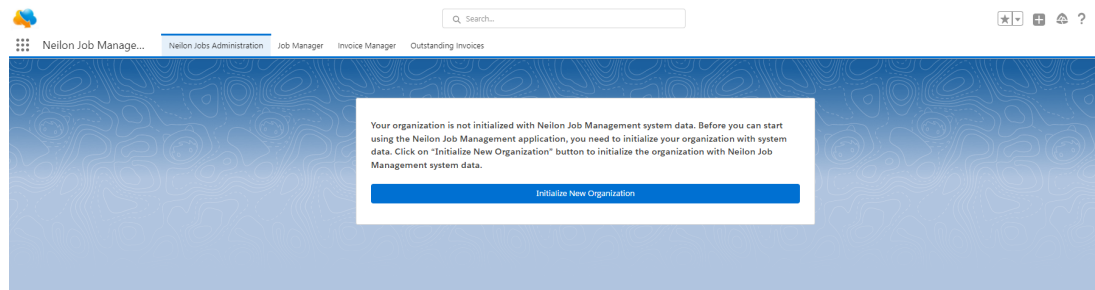
## 2. Initializing the application configuration

Once the Neilon Job Management package is installed, you need to initialize the application configuration.

### 1. From the Application Launcher, select **Neilon Job Management**.



### 2. Now, select the **Neilon Job Administration** tab. From this display, click the **Initialize New Organization** button.

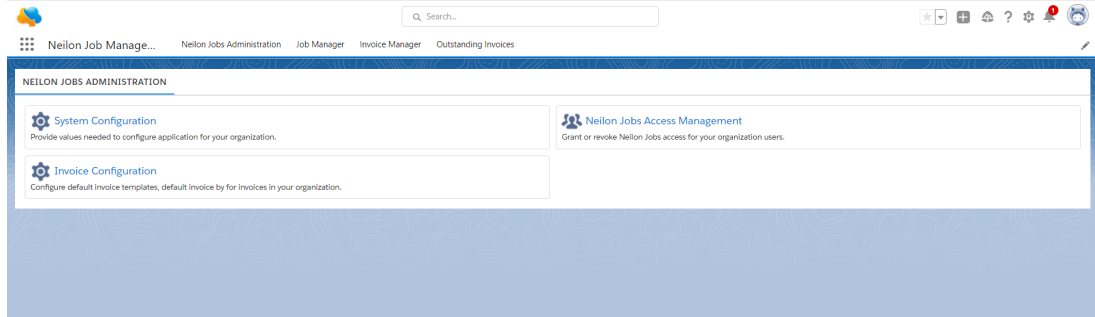


The application configuration is now initialized.

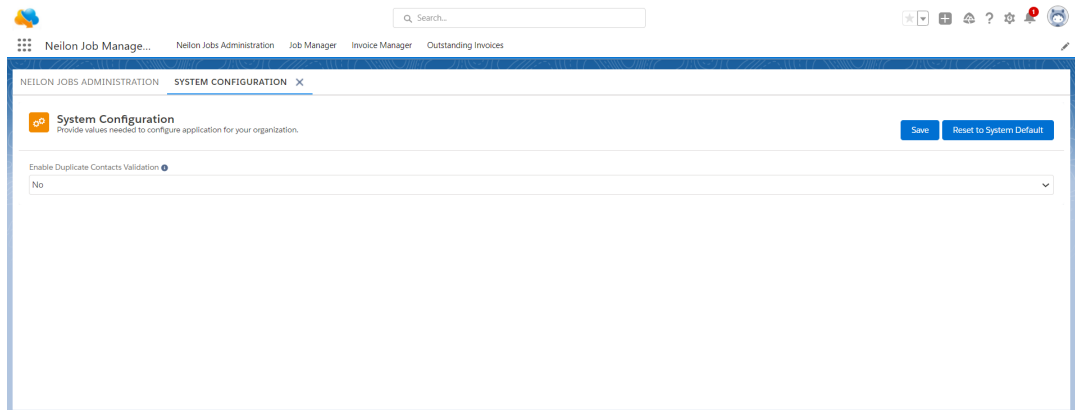
## 3. Updating system properties

After initializing the Neilon Job Management configuration, you need to set up a couple of system properties specific to each customer's environment.

### 1. From the **Neilon Job Management Administration** tab, click **System Configuration**.



2. Set the No for **Enable Duplicate Contacts Validation**. Click Save.



#### 4. Assign permission sets to users

Follow below steps to assign our permission set to your users

1. Go to Neilon Job Management Administration > Neilon Jobs Access Management
2. Click **Grant Access to All**

#### 5. Set Job# Prefix and Invoice# Prefix

There will be prefix used for Job # and Invoice #. Follow below steps to set those prefixes

3. Go to Setup > Custom Metadata Types > Job Management Setting
4. Click **Manage Job Management Settings**
5. Edit **Job Management Job# Prefix**
6. Provide whatever prefix you want to use in **Value**

**SETUP** Custom Metadata Types

### Job Management Setting (Managed)

This Job Management Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Job Management Setting Edit**

**Information**

Label	<input type="text" value="Job Management Job Prefix"/>	Namespace Prefix	NEILON1
Job Management Setting Name	<input type="text" value="Job_Management_Job_Prefi"/>		
Type	<input type="text" value="Prefix"/>		
Value	<input type="text" value="JOB"/>		

7. Click **Save**
8. Edit **Job Management Invoice# Prefix**
9. Provide whatever prefix you want to use in **Value**

**SETUP** Custom Metadata Types

### Job Management Setting (Managed)

This Job Management Setting is managed, meaning that you may only edit certain attributes. [Display More Information](#)

**Job Management Setting Edit**

**Information**

Label	<input type="text" value="Job Management Invoice Pre"/>	Namespace Prefix	NEILON1
Job Management Setting Name	<input type="text" value="Job_Management_Invoice_F"/>		
Type	<input type="text" value="Prefix"/>		
Value	<input type="text" value="INV"/>		

10. Click **Save**