

New in JobBOSS²: Help Your Team Get More Out of the System — Guides, Tooltips & More

We're excited to share a new optional feature now available in your JobBOSS² environment: in-app guidance designed to help your users learn faster, work smarter, and get more value out of the system — right where they're already working.

Why We Think You'll Love It

- Faster onboarding for new employees, with less strain on your training resources.
- Fewer basic support tickets, since answers are available right inside the product.
- Higher user confidence and adoption of features your team already has access to.
- Full flexibility — every user can dial their experience up or down to match how they like to work.

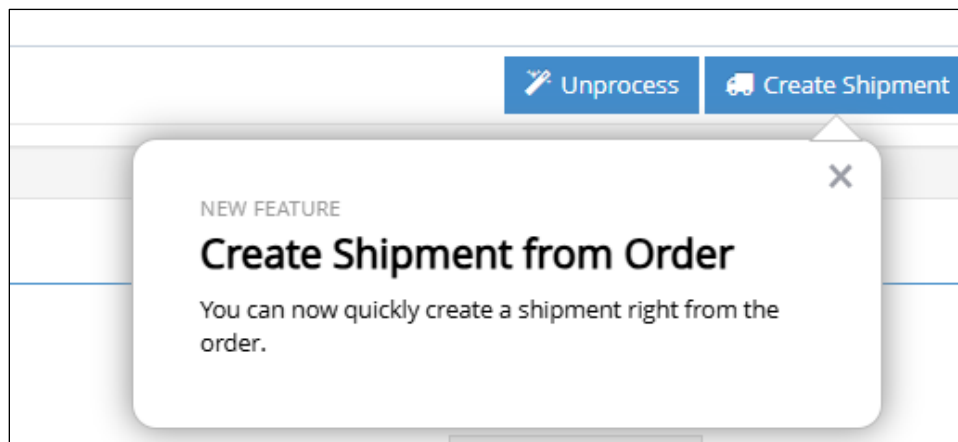
We're confident this will make JobBOSS² an even better experience for your team.

What's New

Four new tools are available to help your users succeed in JobBOSS²:

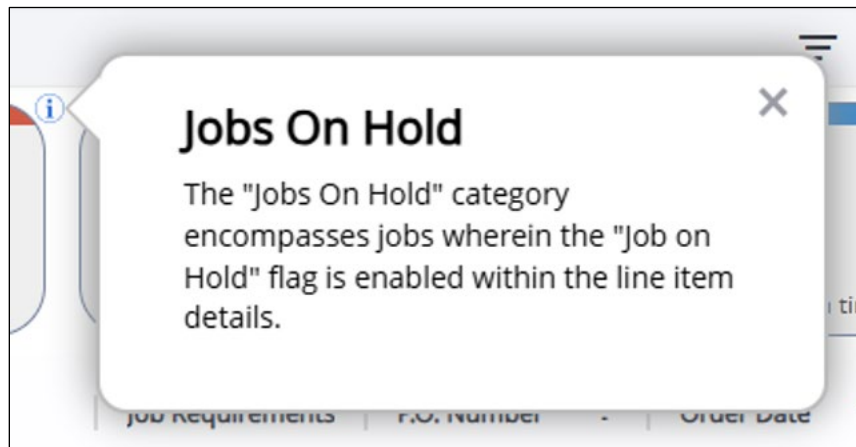
1. Guides

Step-by-step, in-app walkthroughs that help users learn new features and complete key workflows with confidence — no need to leave the screen or search for help.



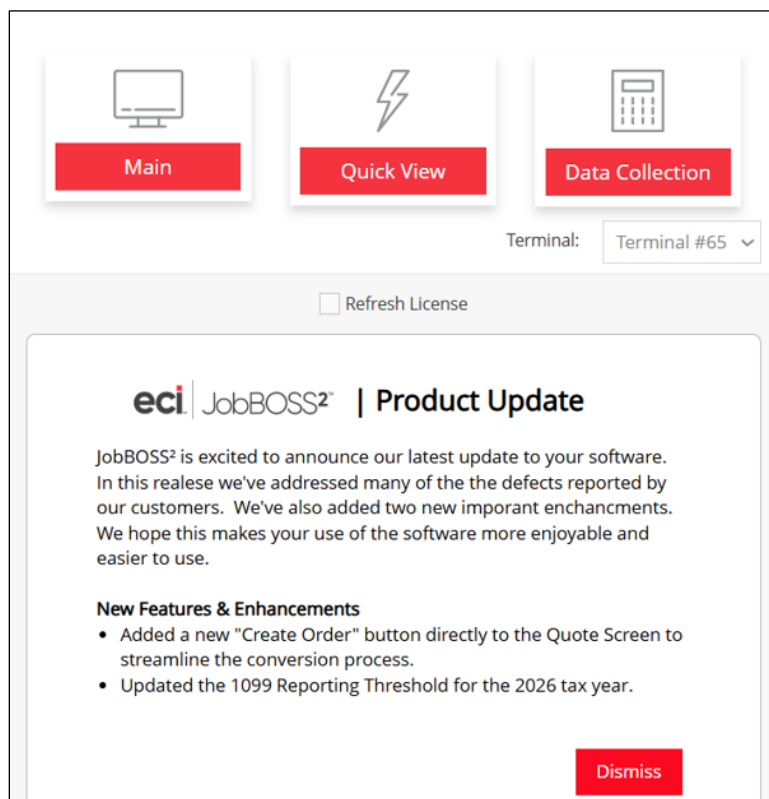
2. Tooltips

Short, contextual hints that appear right next to fields, buttons, and menus, explaining what they do exactly when your users need it.



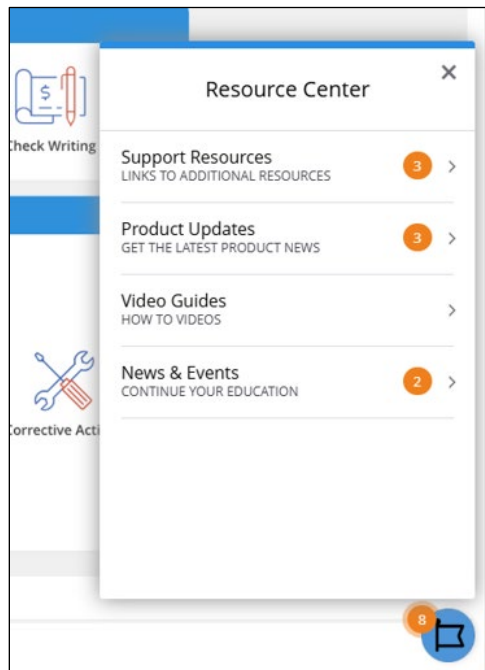
3. Product Notifications

Friendly in-app announcements that let users know as soon as new features, improvements, or fixes are released — so your team is always in the know.



4. Resource Center

A single, always-available hub inside JobBOSS² that brings together guides, tips, notifications, and helpful resources — giving users a self-serve destination whenever they have a question.



You're in Control — Two Simple Levels

This feature is designed to give you flexibility at every level, from the organization down to the individual user.

Step 1 — Organization-level enablement (Admin)

As the administrator, you decide whether this feature is available to your organization at all. It's off by default, opt-in, and takes just a moment to turn on — whether you're installing the newest version for the first time or updating your preference later.

We recommend enabling it — it's a fast, no-cost way to reduce support requests, speed up onboarding for new hires, and help your team discover features they may be missing today.

Step 2 — Individual user preference (Everyone)

Once enabled for your organization, each user can choose their own comfort level at any time from their personal preferences — no admin action required for changes. Here are the levels available:

Level	What's Included	Recommended For
Disabled	No tracking or in-app guidance.	Users who prefer a completely uninterrupted workspace.
Essential Guidance	Tracking and essential support guides only.	Standard users — the recommended minimum for everyone.
Enhanced Support & Updates	Full tracking, guides, surveys, and news.	Power users who want the full experience and to be first to know.

Our recommendation: turn the feature on for your organization, set power users to Enhanced Support & Updates so they're first to see new capabilities, and set standard users to at least Essential Guidance so nobody misses a critical support guide or notice.

How users choose their level

Once your organization has this enabled, users are prompted with an "Optimize Your JobBOSS² Experience" screen where they can pick the level that's right for them right away.

Optimize Your JobBOSS² Experience

Enable in-app guidance and analytics to ensure your team gets the most out of the platform. This allows us to provide real-time support, feature walkthroughs, and essential product updates directly within your workflow.

Enhanced Support & Updates: Full tracking, guides, surveys, and news.

Essential Guidance: Tracking and essential support guides only.

Disabled: No tracking or in-app guidance.

Select your preference:

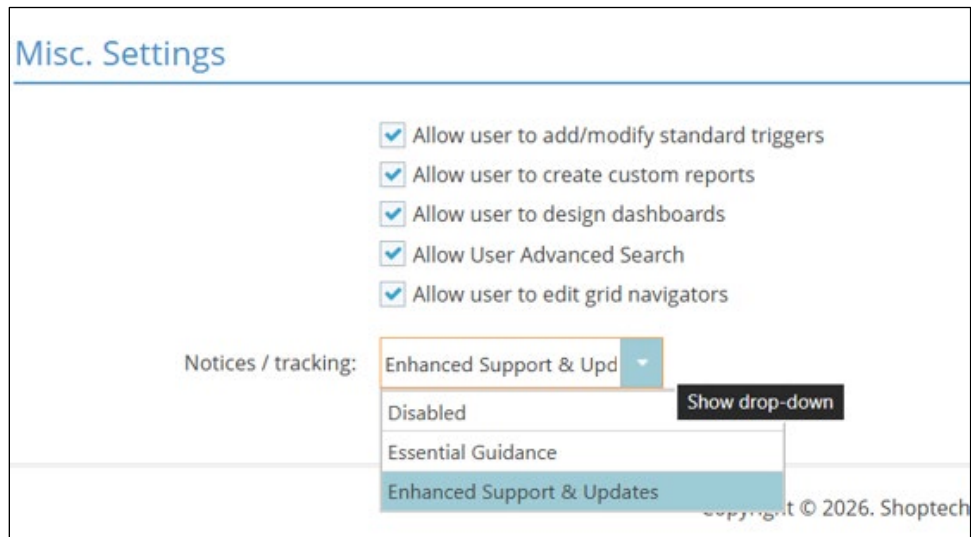
Disabled

Disabled

Essential Guidance

Enhanced Support & Updates

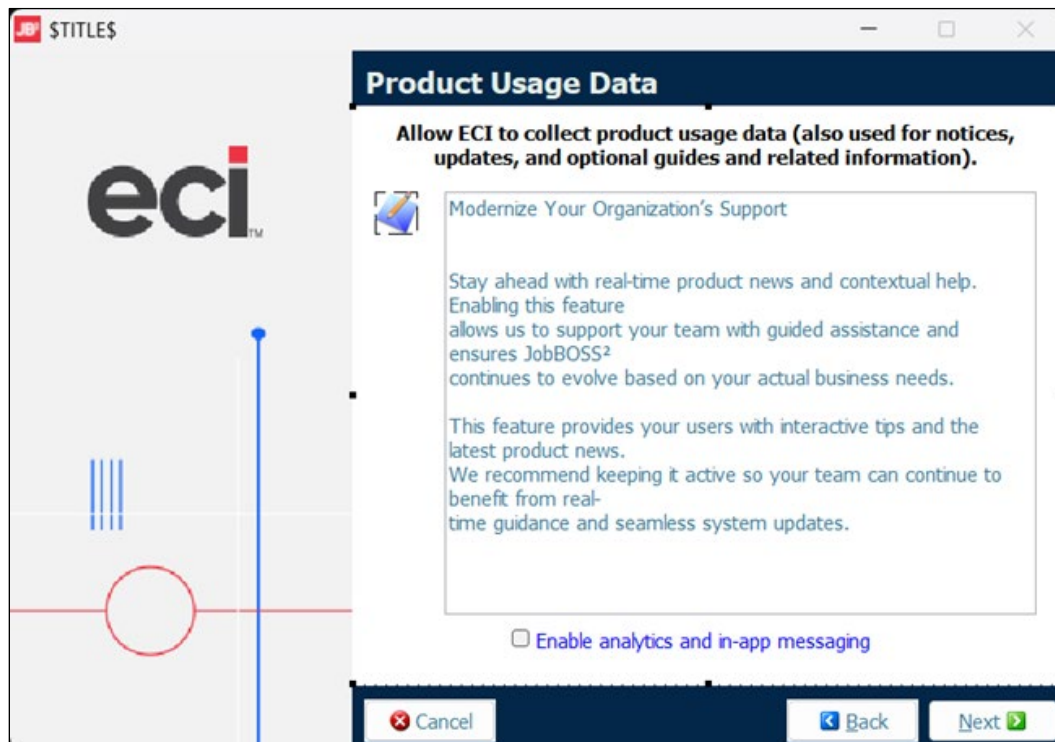
Users (or an admin, on their behalf) can also change this selection at any time afterward from User Settings, under Misc. Settings, using the "Notices / tracking" dropdown.



How to Enable This for Your Organization

Option A — When you install or upgrade to the newest version

When you install or upgrade to the newest version of JobBOSS², you'll see a Product Usage Data screen during setup. Simply check the box for "Enable analytics and in-app messaging" and continue — that's all it takes to turn this on for your organization.

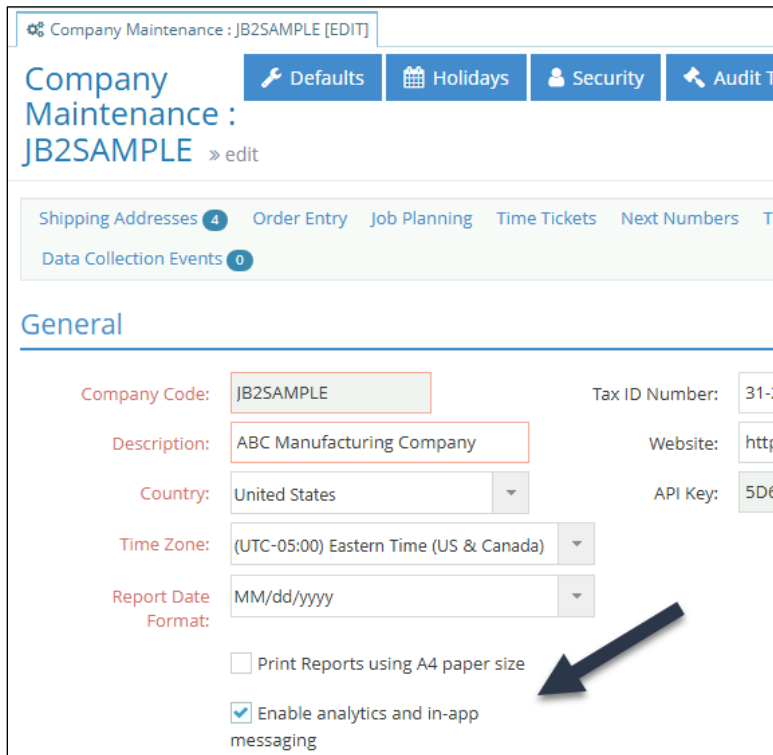


Option B — Anytime afterward

Didn't opt in during setup, or want to change your mind later? No problem — administrators can also turn this on (or off) at any time from [Admin Settings > Preferences > In-App Guidance] (placeholder — confirm exact path), without needing to reinstall or upgrade:

1. Log in to JobBOSS² as an Administrator.
2. Navigate to Settings > System > Company Maintenance > Edit Company > General.
3. Toggle "Enable In-App Guidance" to On.
4. Save your changes.

Either way, once it's on, your users can immediately head to their own preferences to choose the guidance level that works best for them.



Company Maintenance : JB2SAMPLE [EDIT]

Company Maintenance : JB2SAMPLE » edit

Shipping Addresses 4 Order Entry Job Planning Time Tickets Next Numbers T

Data Collection Events 0

General

Company Code:	JB2SAMPLE	Tax ID Number:	31-2
Description:	ABC Manufacturing Company	Website:	http
Country:	United States	API Key:	5D6
Time Zone:	(UTC-05:00) Eastern Time (US & Canada)		
Report Date Format:	MM/dd/yyyy		
☐ Print Reports using A4 paper size			
☒ Enable analytics and in-app messaging			

If you have any questions about enabling this feature or want a walkthrough, please contact [Customer Support](#). We're happy to help.