

Job Management

Last Modified on 01/09/2023 4:10 pm EST

Job Management Menu

The Job Management module contains many functions that are used by staff members in many departments to manage new installations. Each option within the module is secured by User Group Security permissions.

Appointment Summary – Selecting this option will display the Appointment Summary which is one option available for scheduling time for an employee to work on a Job. Job Appointments created with this option will appear on the SedonaSchedule Schedule Board (Service/Jobs Scheduling Board).

Job Approvals – This is an optional feature which provides an added layer of security as it relates to approving Jobs for production. Jobs that have not been approved for processing may not have purchase orders created or be scheduled on the Appointment Summary or Job Schedule board.

Job Queue – This option is used to view a listing of all jobs in process as well as open a job and perform job related functions.

Sales Period Close – This is an optional feature that restricts Users from creating a new job in a sales period that has been closed.

Schedule – This is another method that may be used to schedule installers to work on jobs. This is an independent Job scheduling board and does not link to the Schedule Board within SedonaSchedule (Service/Jobs Scheduling Board).

Timesheets – This option is used for bulk timesheet entry.

Job Query Builder – This option will open the Job Query Builder tool. This is a built in report writer with which Users may develop, save and print reports based on inventory Job data stored within your SedonaOffice database. General instructions on how to use this tool are covered in the Client Management section of this Help.

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