Create a New Job Manually Overview and Topics

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Creating a Job manually begins from the Customer Explorer. Prior to creating the Job, the User must first perform the appropriate setup of a Customer/Site/System.

- If the Job is being created for a new Customer - Create the Customer, Site and System records first.
- If the Job is being created for a new Site for an existing Customer - Open the Customer Explorer record for the Customer and create the Site and System records.
- If the Job being created is for a new System on an existing Customer Site - Open the Customer Explorer record for the Customer and create the new System within the appropriate Site tree.

To create a new Job, follow the steps listed below.

1. Open the Customer Explorer for the Customer for which the Job will be created.

2. On the Customer Tree, highlight the Jobs option; right-click and select the New Job option.

3. If the Customer has more than one Site or more than one System record, the Select Customer Site form will be displayed.

Highlight the correct System record within the correct Site, then click the Select button located at the lower right of the form.
If the Customer has only one Site and one System, the application will not prompt you to select a Site/System.

The Job Work Order form will be displayed.

Follow the links below for filling in the various Job data entry forms.

Work Order

Job System

Job Tasks

Installs

Recurring

Materials

Job Costing Estimate

Commissions

Custom Fields