Job Work Order Form

Last Modified on 07/09/2026 11:17 am EDT

In the Job toolbar, click Work Order. The Job Work Order Entry form opens. This is the first data entry form for the new job. Most of the information on this form is automatically filled in from the customer and site information. Fill out this form according to your company policy and procedures.

Four fields on this form are required to be able to save and advance to the second Job setup form:

- Job Type
- Install Company
- Salesperson
- Sold Date

When finished filling out this form, click the **Apply** button located at the lower right to save and advance to the Job System form.

Click on the link for instructions on the Job System form.

