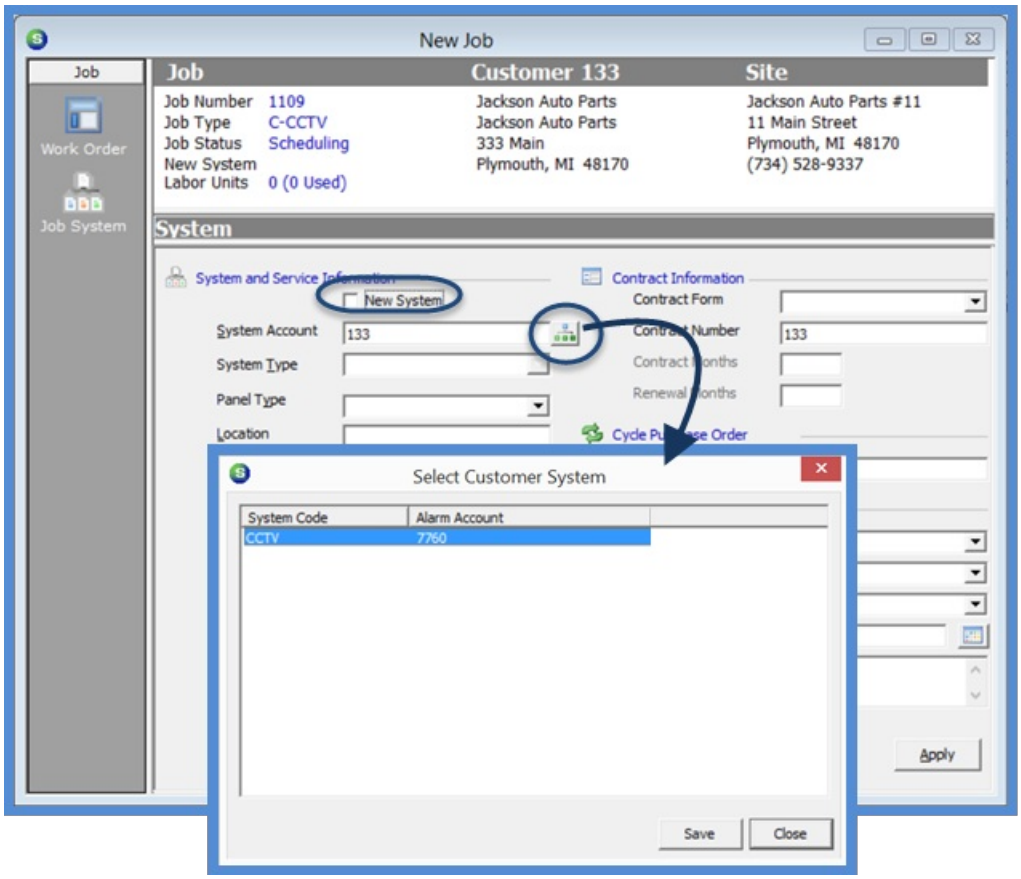
Job System Form

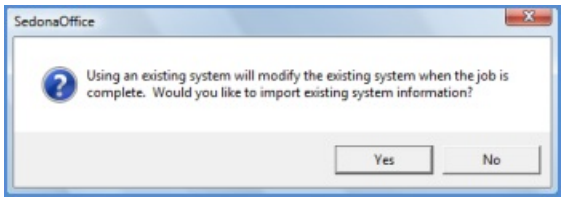
Last Modified on 07/09/2026 11:18 am EDT

In the Job toolbar, click Job System. The Job System form opens. Clear the New System checkbox at the top left of the System form. Click the lookup button to the right of the System Account field.

The Select Customer System form opens. Highlight the System record then click the Save button at the lower right of the form.



A confirmation message opens; click the Yes button to proceed.



The System form automatically fills in with all the information setup from the Customer Explorer. Click the Apply button to save the information loaded into this form.

While the Job is in process, any changes that need to be made to any of the fields of the System record must be done from the Job System form. When the Job is closed, the Job System information will overwrite the System information displayed in the Customer Explorer.

Click on the link for instructions on the next form, Job Tasks.