

Job Templates Overview and Topics

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Job Templates are a feature of Job Management which allows your company to setup Templates containing default Job Tasks, Install Charges, Parts, Recurring Services, or a combination of any of these four items.

For companies performing jobs with the same task, install charges, recurring charges or material charges on a frequent basis, creating Job Templates expedites the data entry process when creating a new job.

A Job Template may be created for one or any combination of these four elements.

Job Templates are designed to drastically reduce the amount of data entry time for type of Jobs that are performed on a frequent basis.

When setting up a Job Template, a "real" Job is created and is typically assigned to a fictitious customer. You may create/attach Job Templates to a real customer if desired.

When creating a Job for a new Install, you have the ability to import a Job Template for the Job Tasks, Install Charges, Materials List, and Recurring Services. You may import the elements from one Job Template or a combination of different Job Templates if needed.

Job Template Setup

Prior to creating your first Job Template, first setup a new Customer/Site to which the templates will be attached; you may name this customer "Template", or "Template Residential Install", etc. for ease of later searches.

You should also setup a new Job Type labeled "Template". Setup a least one Job Task on this Job Type; you do not need to setup any other information on the Job Type, and just one Job Task to be able to save the Job Type.

Follow the links below for Job Template Topics:

[Creating a Job Template](#)

[Using a Job Template](#)