

Creating a Job Template

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To create a Job Template, follow the instruction below.

In the example provided throughout this section, we will be setting up a Job Template for a simple residential Intrusion Job.

1. Open the Customer Explorer for your "Template" customer (as mentioned on the previous page).
2. On the Customer Tree, click on the Jobs option, right-click and select the New Job option.
3. The Job Work Order form will be displayed.

Select/ Enter the:

- Job Type of Template (or some other job type your company has setup for job templates)
- Install Company
- Salesperson
- Sold Date

Click the Apply button when finished.

Note: If your company is auto-numbering Jobs, once the Job is saved, you may return to the Work Order form to change the Job Number to distinguish between regular Jobs and Templates within the Job Queue. For example you may have an entirely different numbering sequence from your regular Jobs and/or begin the Job Number with the letter T.

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4. After saving the Work Order form, the Job System form will be displayed. Select the System Type for the Template from the drop-down list, then click on the Apply button.

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5. Next navigate to the Job Tasks form; setup the appropriate Tasks for the Job Template being created. Click the Apply button when finished.

6. Next you will setup one or all four possible elements of the Job Template:

- Job Task List
- Install Charges
- Recurring Charges
- Materials List

7. When finished, return to the Work Order form. At the lower right of the form, click on the Create Template button.

8. The Job Template form will be displayed to enter a name for the Template and enter a Comment related to the Job

Template. When finished filling out the form, click the Save button.

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