

# Using a Job Template

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When creating a new Job, you have the option of applying one, many or all of the elements of a single or various Job Templates to the Job.

At the bottom of the Job Task, Install Charge, Recurring Charges, and Materials List's is a button labeled Apply Template; clicking this button will open the search form from which to select the desired Job Template.

## Job Tasks Template

When creating a new Job, the Job Type is selected on the Job Work Order form; the Job Type contains many defaults which will attach to the Job, including the Job Task List.

If you want to use the Job Tasks from a Job Template, click the Apply Template button on the Job Task form, and select the desired Template. When doing this, the default Job Tasks from the Job Type will be removed, and the Job Tasks from the Template will auto-fill into the form. You can save the new Job Task List as-is or remove, modify or add Job Tasks depending on the path of the Job being created.

Click the Apply button to save the Job Task List.

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## Install Charges Template

If you want to use the Install Charges from a Job Template, click the Apply Template button at the lower left of the form and select the desired Template from the drop-down list.

When doing this, the Invoice Items from the Template will auto-fill into the form. You can save the Invoice Items as-is, remove, modify, or add additional Invoice Items depending on the contract with your customer.

Click the Apply button to save the Install Charges.

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## Recurring Charges Template

If you want to use the Recurring Charges from a Job Template, click the Apply Template button at the lower left of the form and select the desired Template from the drop-down list.

When doing this, the Recurring Invoice Items from the Template will auto-fill into the form. You can save the Recurring Invoice Items as-is, remove, modify, or add additional Invoice Items depending on the contract with your customer.

Click the Apply button to save the Recurring Charges.

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## Materials List Template

If you want to use the list of Materials from a Job Template, click the Apply Template button at the lower left of the form and select the desired Template from the drop-down list.

When doing this, the Part Numbers, quantities, sales price (if billing for individual parts) and phase from the Template will auto-fill into the form. You can save the Parts List as-is, remove, modify, or add additional Parts depending on the contract with your customer.

Click the Apply button to save the Materials List. Materials List Template

