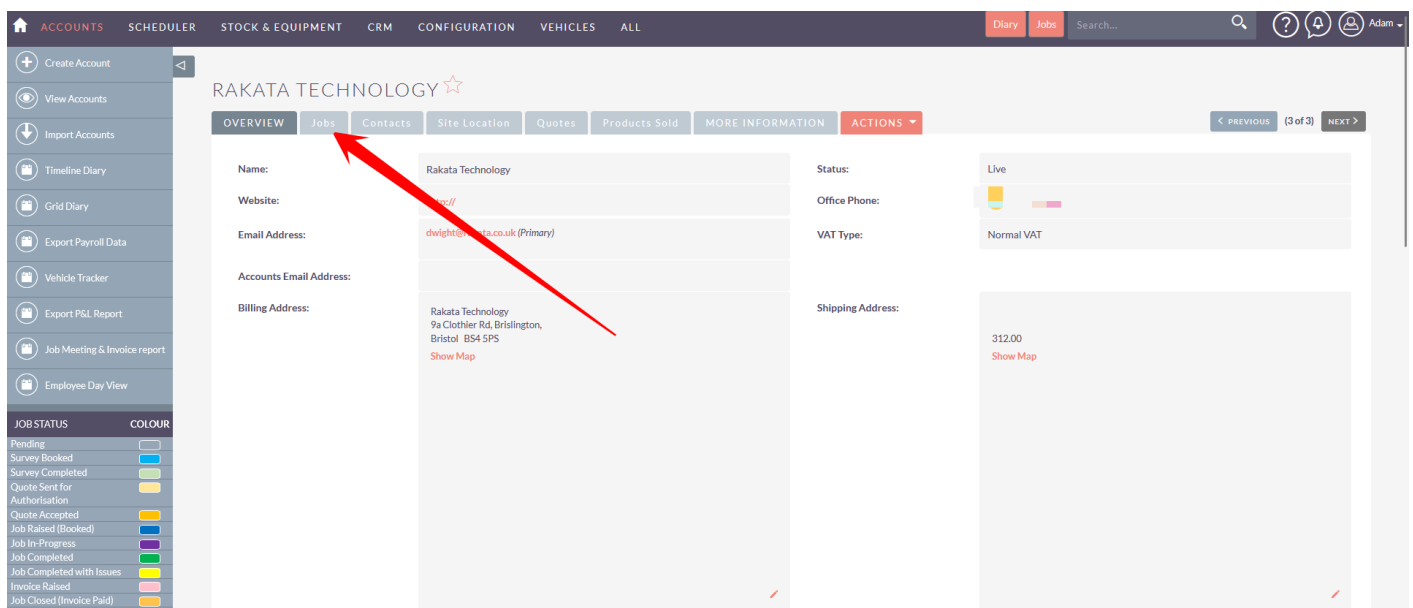


Create a Job

There are a number of ways to create a job. This method views the Account first. We recommend this so you can see details of the Account before creating a new job. For example does the Account already have jobs not completed, are they on stop etc.

From the Accounts page click the Jobs Tab

TIP: If this job will be at a new site location with specific contacts to the Site Location you can click on the Site Location tab and Contacts tab and add these here. You can also do this when creating a job depending on your preference.



The screenshot displays the 'Jobs' tab for an account named 'RAKATA TECHNOLOGY'. A red arrow points to the 'Jobs' tab in the sub-header. The main content area shows job details for 'Rakata Technology'. The 'Name' field is 'Rakata Technology'. The 'Website' field is 'http://www.rakata.co.uk/'. The 'Email Address' field is 'dwight@rakata.co.uk (Primary)'. The 'Accounts Email Address' field is empty. The 'Billing Address' field shows 'Rakata Technology, 9a Clothier Rd, Brislington, Bristol BS4 5PS' with a 'Show Map' link. The 'Status' field is 'Live'. The 'Office Phone' field is empty. The 'VAT Type' field is 'Normal VAT'. The 'Shipping Address' field shows '312.00' with a 'Show Map' link. On the left side, there is a 'JOB STATUS' section with a list of job statuses and their corresponding colors: Pending (grey), Survey Booked (blue), Survey Completed (green), Quote Sent for Authorisation (yellow), Quote Accepted (orange), Job Raised (Booked) (dark blue), Job In-Progress (purple), Job Completed (green), Job Completed with Issues (yellow), Invoice Raised (pink), and Job Closed (Invoice Paid) (orange).

This will list all the jobs for that Account.

You can view the basic details of the job including the status.

The screenshot shows the 'ACTIONS' tab in the RAKATA TECHNOLOGY software. The interface includes a sidebar with navigation options like 'Create Account', 'View Accounts', 'Import Accounts', 'Timeline Diary', 'Grid Diary', 'Export Payroll Data', 'Vehicle Tracker', 'Export P&L Report', 'Job Meeting & Invoice report', and 'Employee Day View'. The main area displays a table of jobs with columns for Job Name, Job ID, Job Start Date/Time, Date Created, Created By, and Status. The 'CREATE JOB' button is located in the top right corner of the main area.

Job Name	Job ID	Job Start Date/Time	Date Created	Created By	Status
Fix my couch	40167		2024-03-25 19:39:07	Adam demo	Completed
Boiler not working	39854		2023-11-14 08:50:13	Adam demo	Completed
Annual Service 2023	39790		2023-11-07 08:48:28	Connor demo	Invoice Raised
Dwight's Electrical board at home	39024		2023-07-05 15:49:56	Adam demo	Completed
Test JOB	38715		2023-05-12 16:16:28		Pending
Install new hot tap	38135		2023-02-20 12:21:44	Adam demo	Completed
Annual Service 2022	37339		2022-11-11 16:18:33	Sarah demo	Completed
No hot water - pump over run	37266		2022-11-07 07:58:59	Adam demo	Completed
Electrical works	37242		2022-11-03 08:11:21	Sarah demo	Completed
replace diaphragm	37215		2022-10-31 11:19:04	Sarah demo	Completed
visit to quote for improvement works	37134		2022-10-19 12:46:55	Sarah demo	Completed
Upgrade board and lighting	36720		2022-08-09 15:47:52	Adam demo	Completed
Lights Investigation	36578		2022-07-20 14:48:56	Courtney demo	Completed
Survey	36330	2022-06-06 10:00:00	2022-06-06 07:54:14	Courtney demo	Completed
test sagar	10140	2022-02-24 08:00:00	2022-02-24 12:51:12	Paresh demo	Completed

Click the Create Job button to create a new job

The screenshot shows the 'ACTIONS' tab in the RAKATA TECHNOLOGY software. The interface is similar to the previous one, but a red arrow points to the 'CREATE JOB' button in the top right corner of the main area.

Job Name	Job ID	Job Start Date/Time	Date Created	Created By	Status
Fix my couch	40167		2024-03-25 19:39:07	Adam demo	Completed
Boiler not working	39854		2023-11-14 08:50:13	Adam demo	Completed
Annual Service 2023	39790		2023-11-07 08:48:28	Connor demo	Invoice Raised
Dwight's Electrical board at home	39024		2023-07-05 15:49:56	Adam demo	Completed
Test JOB	38715		2023-05-12 16:16:28		Pending
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Annual Service 2022	37339		2022-11-11 16:18:33	Sarah demo	Completed
No hot water - pump over run	37266		2022-11-07 07:58:59	Adam demo	Completed
Electrical works	37242		2022-11-03 08:11:21	Sarah demo	Completed
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visit to quote for improvement works	37134		2022-10-19 12:46:55	Sarah demo	Completed
Upgrade board and lighting	36720		2022-08-09 15:47:52	Adam demo	Completed
Lights Investigation	36578		2022-07-20 14:48:56	Courtney demo	Completed
Survey	36330	2022-06-06 10:00:00	2022-06-06 07:54:14	Courtney demo	Completed
test sagar	10140	2022-02-24 08:00:00	2022-02-24 12:51:12	Paresh demo	Completed

When creating the job from the Account record the Job will automatically set the Account

The Job will also Job Site Locations against this job. If the site location is NOT set or this is a new site location you can add a new site at this point.

TIP: All jobs must have a site location. For some customers that might only ever be one site location which is the same as the Account address. But for larger customers you might have many site locations against the one account. There is NO limit to the number of site locations you have or related contacts to that site location.

HOME

JOBS

SCHEDULER

STOCK & EQUIPMENT

CRM

CONFIGURATION

VEHICLES

ALL

DiaryJobsSearch...?Adam

Create JobsView JobsImportJob Report (BW)Timeline DiaryGrid DiaryExport Payroll DataVehicle TrackerExport P&L ReportJob Meeting & Invoice reportEmployee Day View

CREATE

SAVECANCEL

BASICP & L

Job ID:

Name:

Accounts:

1

Rakata Technology

Locations:

2

19 Acacia Road, Bristol, BS16 4NL, England, United Kingdom

Clothier Road, Bristol, BS4 5PS, England, United Kingdom

Contacts:

Reference/Authorised Name:

Job Details:

Status:

Pending

Job Account Manager:

Agreed to be invoiced?:

Yes

Automatically Update Job Status:

Yes

Incorporate into WIP report?:

Yes

Order Number:

Job Value (£):

Type:

Reactive

Complete the Job details are required.

Next > [Book a Survey](#)

Revision #4

Created 26 March 2024 06:58:26 by RakataTech

Updated 15 April 2024 08:32:47 by RakataTech