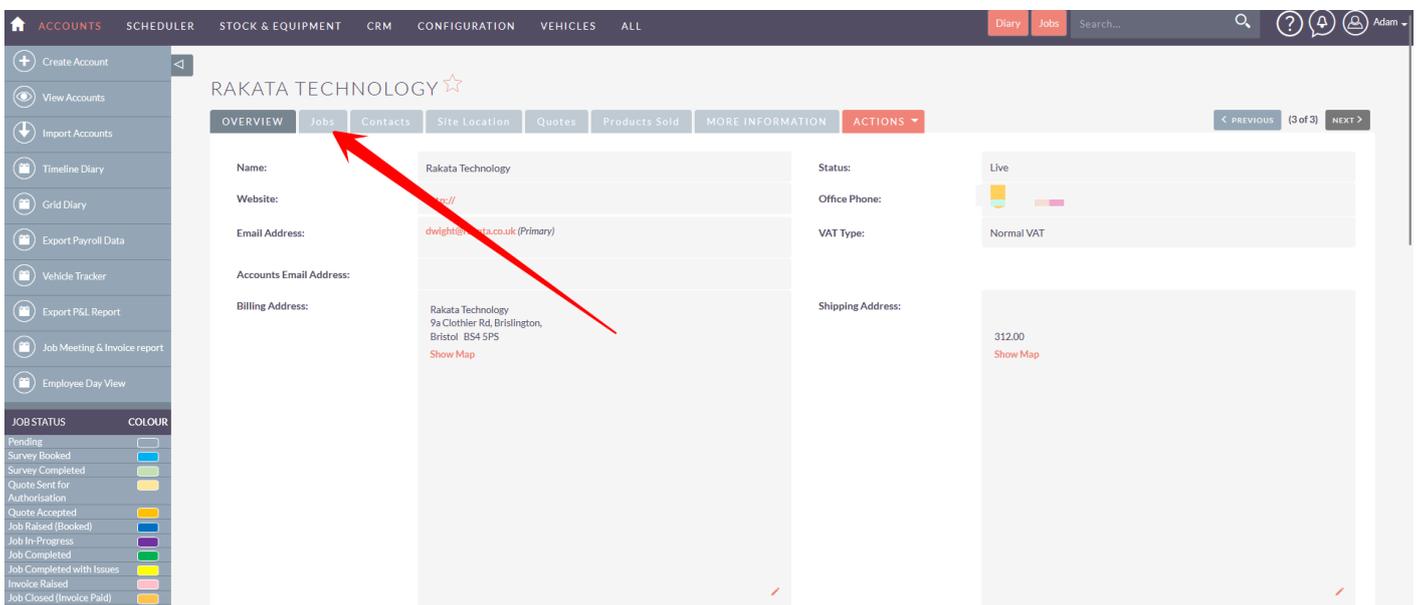


# Create a Job

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 a software interface for account management. The top navigation bar includes 'ACCOUNTS', 'SCHEDULER', 'STOCK & EQUIPMENT', 'CRM', 'CONFIGURATION', 'VEHICLES', and 'ALL'. A secondary bar contains 'Diary', 'Jobs', and a search field. The main content area is titled 'RAKATA TECHNOLOGY' and features several tabs: 'OVERVIEW', 'Jobs', 'Contacts', 'Site Location', 'Quotes', 'Products Sold', 'MORE INFORMATION', and 'ACTIONS'. A red arrow points to the 'Jobs' tab. Below the tabs, the account details are displayed in a grid format:

Name:	Rakata Technology	Status:	Live
Website:	<a href="#">http://www.rakata.co.uk/</a>	Office Phone:	
Email Address:	<a href="mailto:dwright@rakata.co.uk">dwright@rakata.co.uk</a> (Primary)	VAT Type:	Normal VAT
Accounts Email Address:		Shipping Address:	
Billing Address:	Rakata Technology 9a Clothier Rd, Brislington, Bristol BS4 5PS <a href="#">Show Map</a>		312.00 <a href="#">Show Map</a>

On the left side, there is a 'JOB STATUS' legend with various colored boxes corresponding to different job stages: Pending, Survey Booked, Survey Completed, Quote Sent for Authorisation, Quote Accepted, Job Raised (Booked), Job In-Progress, Job Completed, Job Completed with Issues, Invoice Raised, and Job Closed (Invoice Paid).

This will list all the jobs for that Account.

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

RAKATA TECHNOLOGY

OVERVIEW Jobs Contacts Site Location Quotes Products Sold MORE INFORMATION ACTIONS

Show 100 entries

CREATE JOB

Search:

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

RAKATA TECHNOLOGY

OVERVIEW Jobs Contacts Site Location Quotes Products Sold MORE INFORMATION ACTIONS

Show 100 entries

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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 filter 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 Diary Jobs Search... ? A Adam

CREATE

SAVE CANCEL

BASIC P & L

Job ID: [text box]

Name: [text box]

Accounts: **1** Rakata Technology [add] [remove]

Locations: **2** [dropdown]

Contacts: 19 Acacia Road, Bristol, BS16 4NL, England, United Kingdom  
Clothier Road, Bristol, BS4 5PS, England, United Kingdom

Reference/Authorised Name: [text box]

Job Details: [text area]

Status: Pending [dropdown]

Job Account Manager: [text box] [add] [remove]

Agreed to be invoiced?: Yes [dropdown]

Automatically Update Job Status: Yes [dropdown]

Incorporate into WIP report?: Yes [dropdown]

Order Number: [text box]

Job Value (£): [text box]

Type: Reactive [dropdown]

JOB STATUS	COLOUR
Pending	[light blue]
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	[red]
Job Completed with Issues	[yellow]

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