Job Management

The most important aspect of an engineers day is their jobs. To view an engineers Jobs for the day click the My Jobs icon.

Dashboard
Zach demo
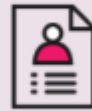
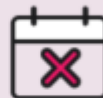|		
Vehicle Check	Create PO	My Jobs
Create Expense	My Expenses	Profile
My POs	Previous Jobs	End Day
Previous Vehicle Check	Company Comms	Off-Job
Daily Time Events	Vehicle Accident Report	Public Documents

RakataCRM M&E App Version : 4.179

This will show all the engineers jobs for the day and jobs for the following day.

Top tip: Engineers can view their jobs for the following day but as Read-only. The cannot make any amendments for the job until the present day.

The My Jobs view lists all jobs for the day. The view for each job show shows the following:

1. Basic job details
2. The status of the engineers worksheets. This is a traffic light approach.
    1. Red = Worksheets
    2. Yellow = Worksheets started and saved but not completed
    3. Green = Worksheets completed
3. The overall status of the job e.g. Job In Progress

Jobs | Training

My Jobs Today

40166   **Job In-Progress**
Dwight JOb 1
Origin Facilities Limited, 1 Bell Street, Maidenhead, United Kingdom, Berkshire, SL6 1BU, ,
Contact Phone: +447920530961
14-04-2024 09:00:00

Off Job   Job
14-04-2024 08:00:00
14-04-2024 09:00:00
Going to dentist

1

2

3

● **Worksheets to complete**

● **All worksheets completed**

● **Deferred Job**

● **Suspended Job**

View Job Details

To start the job and view more job details click on the job view.

This will provide more detail on the job including the location.

Top tip: If the engineer clicks on the Take me here button this open up Google Maps and provide directions directly to the address.

Job Number	**Job In-Progress**
40166	

Job Title
Dwight JOb 1

Account Name	**Account Phone**
Origin Facilities Limited	📞

Contact Name	**Contact Phone**
Dwight Britten	📞 +447920530961

Reference	**Order No**
This is a test	23123

Job Location

Origin Facilities Limited, 1 Bell Street, Maidenhead, United Kingdom, Berkshire, SL6 1BU, ,

TAKE ME HERE

Job Details

Wants a new boiler fixed

Location Timing section 3 ━

Start Date/Time	**End Date/Time**
14-04-2024 09:00:00	14-04-2024 16:30:00

Job Type
Day Work

Site Visit Notes

Worksheets
• A Risk Assessment

Start the Job

The engineer can start the job by clicking Todays Worksheet button.

This will force the user to start the job by creating a Start Job Time Event.

Top Tip: Rakata CRM is designed as a operations job management platform where engineers time is tracked throughout the day. There is no time through out an engineers day where their time is NOT tracked. An engineer is either tracked via an on-job event, off-job event or training.

Start Worksheets

The engineer will be presented with their worksheets they must complete for that job for that day.

Top Tip: The worksheets are colour coded. This is a traffic light system. Red = Worksheet not completed, Yellow = Engineer started with at least one save, Green = Worksheet is completed.

Job Type
Day Work

Site Visit Notes

Worksheets
•A Risk Assessment
•Job Sheet

Start Date/Time
14-04-2024 09:00:00

End Date/Time
14-04-2024 16:30:00

Primary Engineer
Zach Rollings

Secondary Engineer 1

Select Worksheet

A Risk Assessment
A Risk Assessment-Dwight JOb 1-14042024

Job Sheet
Job Sheet-Dwight JOb 1-14042024

Previous Worksheets

Survey Documents

Related Documents

Create PO

My Time Events
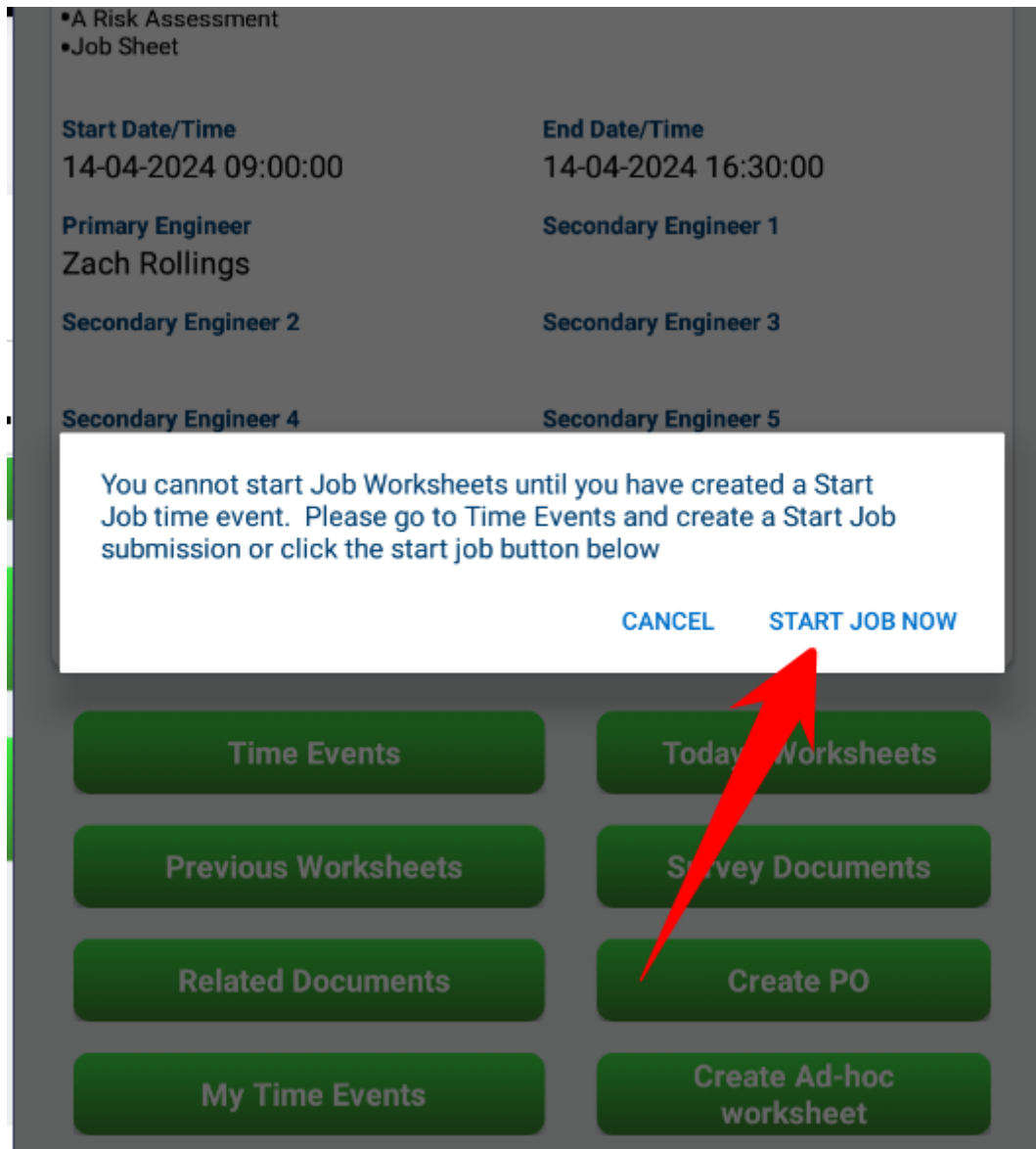
Create Ad-hoc worksheet

Create Expense

JOB POs

Related

Time event save successfully.

Once a worksheet has been completed this will reflect with a colour change

Completing the final worksheet

Once the engineer is completing the final worksheet

Engineer name

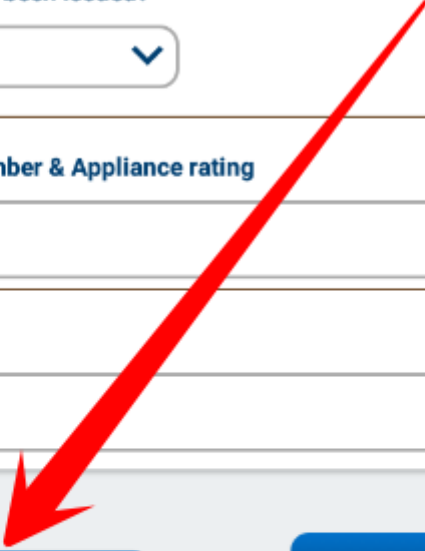Enter detail

Does access equipment need to be off hired?

Select ⌄

Has a warning notice been issued?

Select ⌄

Appliance model number & Appliance rating

Enter detail

Off hire ref

Enter detail
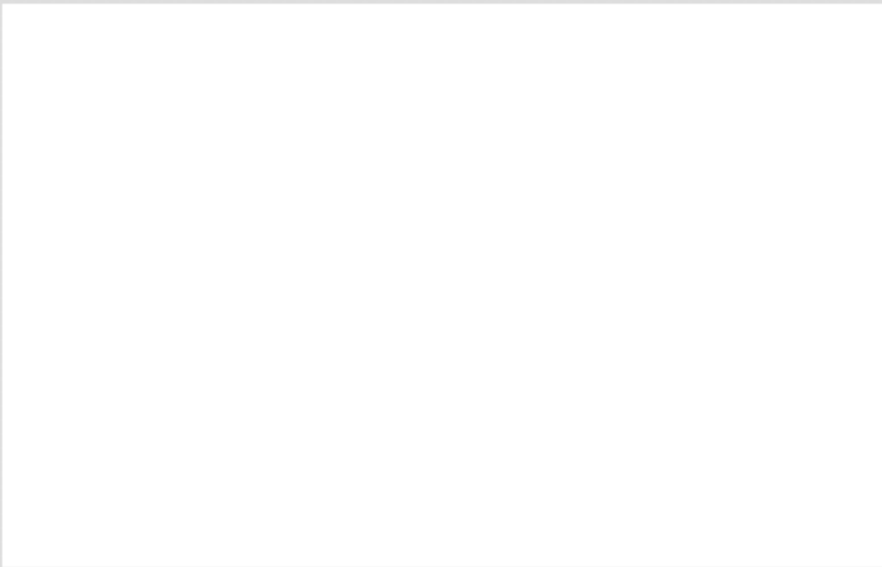
SUBMIT FOR CUSTOMER SIGN-OFF   CANCEL

SAVE AND HOLD – CAN BE REOPENED LATER

Upon completion of the final worksheet the engineer will be prompted to get a customer signature

Dear customer please accept the completion of this job sheet by typing your name and using the signature pad to provide a digital signature

Enter Name

Cancel   Clear   OK

SUBMIT FOR
CUSTOMER SIGN-OFF

CANCEL

SAVE AND HOLD – CAN BE REOPENED LATER

Once a Customer has provided a sign-off the engineer can ask for the customer to complete the customer satisfaction form.

Engineer name

Enter detail

Does access equipment need to be off hired?

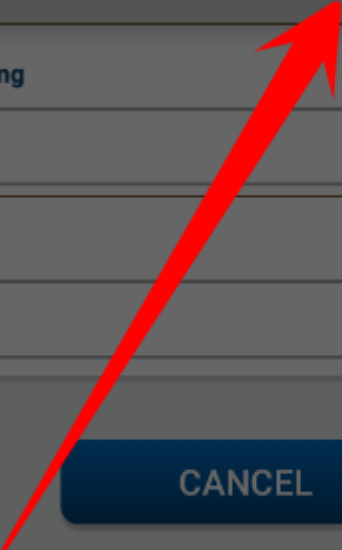We would really appreciate it if you would submit a Customer Satisfaction Form.

CANCEL   YES

Appliance model number & Appliance rating

Enter detail

Off hire ref

Enter detail

SUBMIT FOR CUSTOMER SIGN-OFF   CANCEL

SAVE AND HOLD – CAN BE REOPENED LATER