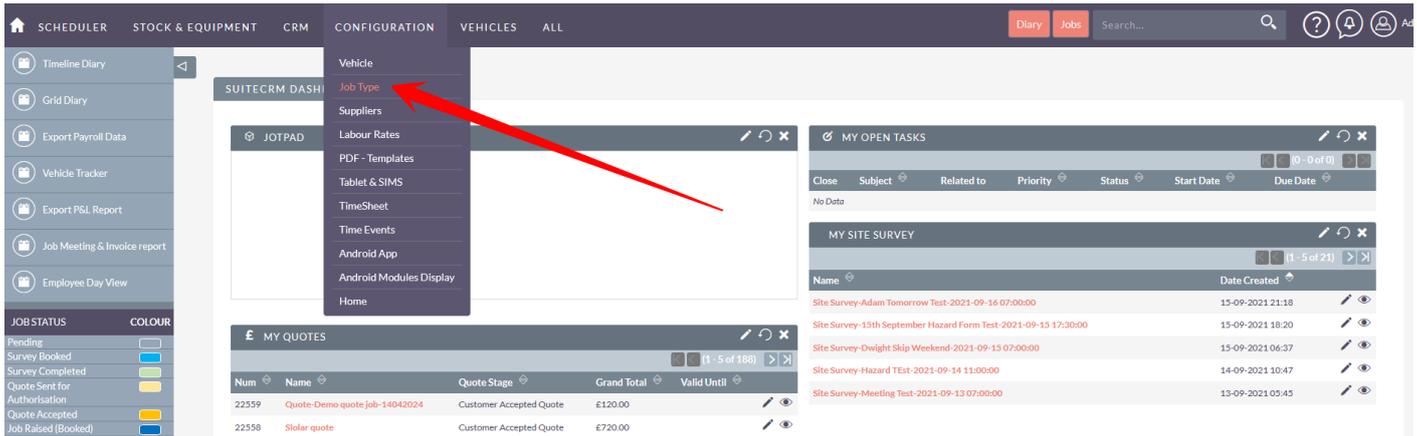


Set the Job Types

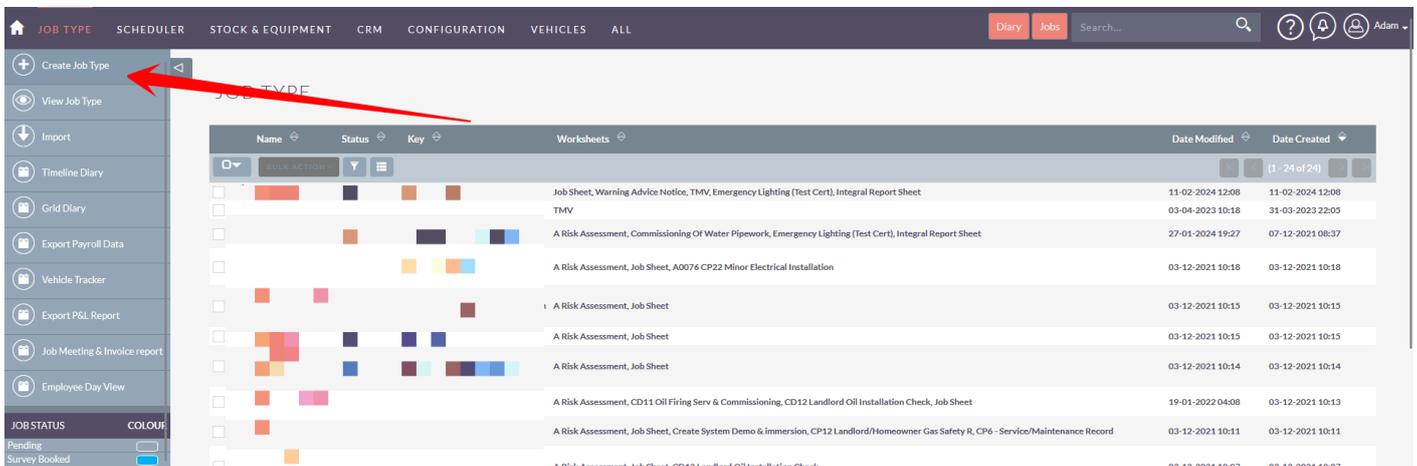
Job Types are simply groups of forms linked together. When creating a [location timing](#) and admin will select which jobsheets they require the operative to complete. By setting the Job Types (groups of worksheets) it will save the Administrator adding all worksheets manually.

Configuration > Job Type



The screenshot shows the software's main navigation bar with 'CONFIGURATION' selected. A dropdown menu is open under 'CONFIGURATION', and a red arrow points to the 'Job Type' option. Other options in the menu include Vehicle, Suppliers, Labour Rates, PDF - Templates, Tablet & SIMS, TimeSheet, Time Events, Android App, Android Modules Display, and Home. The background shows a 'MY QUOTES' table with columns for Num, Name, Quote Stage, Grand Total, and Valid Until.

Create Job Type



The screenshot shows the 'JOB TYPE' configuration screen. A red arrow points to the '+ Create Job Type' button in the left-hand sidebar. The main area displays a table of existing job types with columns for Name, Status, Key, Worksheets, Date Modified, and Date Created. The table contains several rows of job types, each with a unique key and a list of associated worksheets.

Populate the Job Type record

1. Add the record name.
2. Add a unique key - this can be the same as the name.
3. Select if the job type is live (available for selection).
4. Select the worksheets within this job type. When the job type is selected within the location timing all the worksheets selected here will be set to completion.
5. Record any notes for this job type.

HOME JOB TYPE SCHEDULER STOCK & EQUIPMENT CRM CONFIGURATION VEHICLES ALL Diary Jobs Search... ?

CREATE

SAVE CANCEL

BASIC

Name: 1 Standard Day worksheets Status: 3 Live

Key: 2 Standard Day worksheets Worksheets: 4

Description: 5

CRM AUDIT

Created By: Date Created:

Date Modified: Modified By Name:

JOB STATUS COLOUR

- 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
- Job Closed (Invoice Paid)

Save the record. This will be immediately available when creating a Location Timing.

Revision #2

Created 14 April 2024 13:01:57 by RakataTech

Updated 21 April 2024 07:14:39 by RakataTech