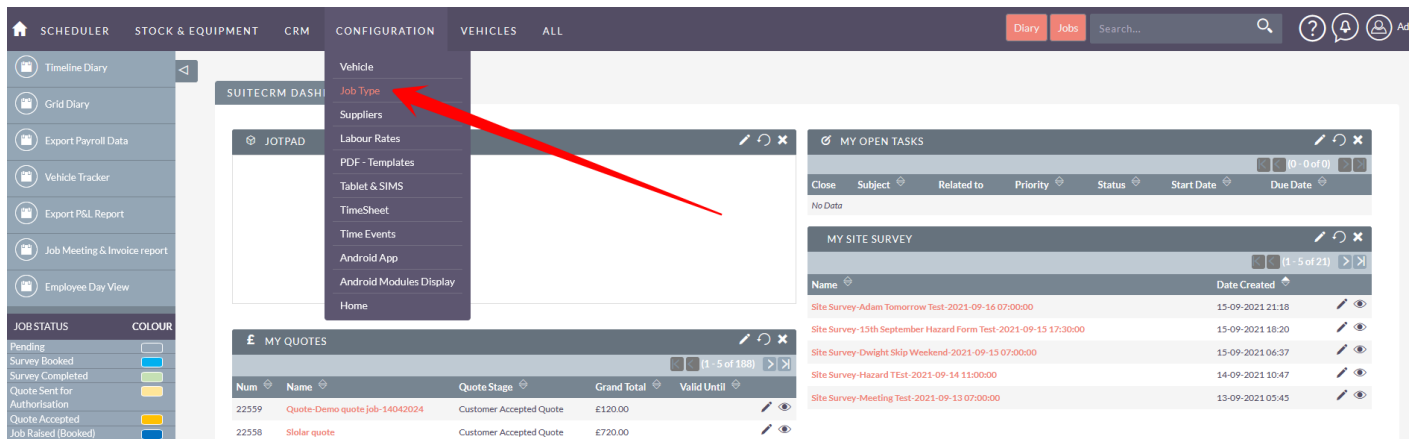


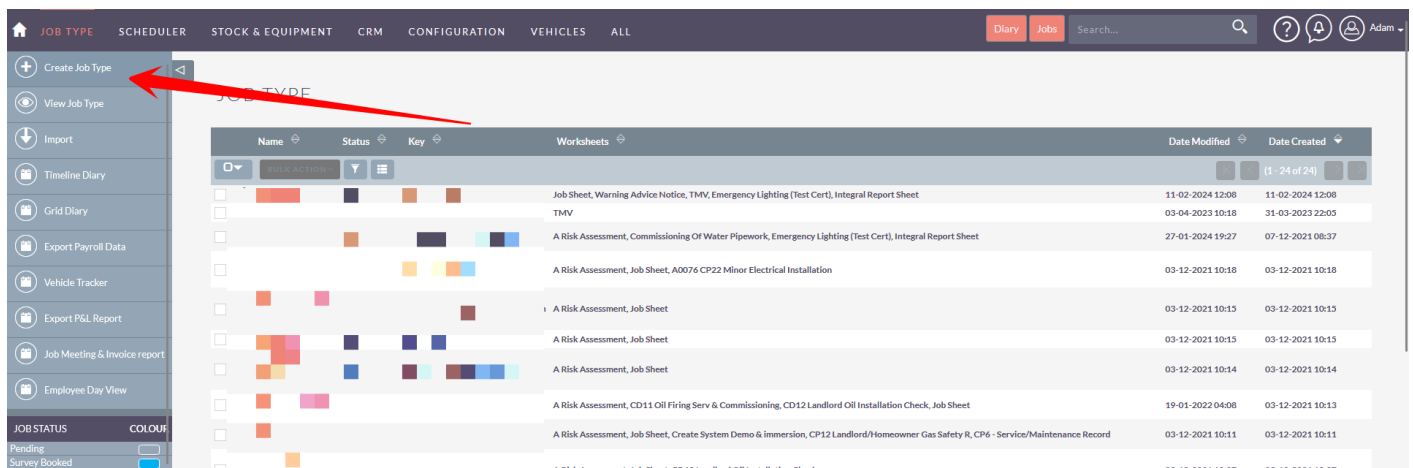
Set the Job Types

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



Create Job Type



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.

HOMEJOB TYPE

SCHEDULER

STOCK & EQUIPMENT

CRM

CONFIGURATION

VEHICLES

ALL

DiaryJobsSearch...?

Create Job Type

View Job Type

Import

Timeline Diary

Grid Diary

Export Payroll Data

Vehicle Tracker

Export P&L Report

Job Meeting & Invoice report

Employee Day View

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)

CREATE

SAVECANCEL

BASIC

Name:Standard Day worksheets

Key:Standard Day worksheets

Description:

Status:Live

Worksheets:

A Risk AssessmentA0043 Electrical Install ConditionA0076 CP22 Minor Electrical InstallationA0077 Domestic Electrical InstallationA0082 CP17 Non Domestic Gas InstallA0083 N/DOMESTIC GAS TEST/PURGING 6

CRM AUDIT

Created By:

Date Created:

Date Modified:

Modified By Name:

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