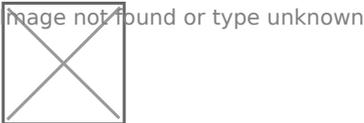
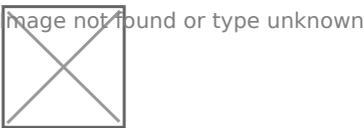


Alternatively, you can create a Job from the Kanban (“Walk In” or “On-Site Survey”)

1. Click "Jobs" button in the main header



2. Click the + Create Job Icon



Tip: Tip! There are two types of Job. Select the option most appropriate.

Walk In

A walk-In job is a job that will NOT require an on-site survey. This might be a customer who has all the information or simply a customer wanting to purchase carpet.

On-Site Survey

This is the normal approach where you take some details about the site and are arranging for a surveyor to visit to measure up.

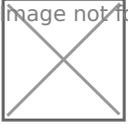
3. Click "On-Site Survey"

image not found or type unknown



4. The job will need to be related to an Account/Customer - to do this click on the link icon.

image not found or type unknown



Tip! From here you can either relate the job to an existing Account or create a new account at this point.

Revision #6

Created 20 March 2024 10:50:17 by RakataTech

Updated 2 June 2024 21:19:21 by RakataTech