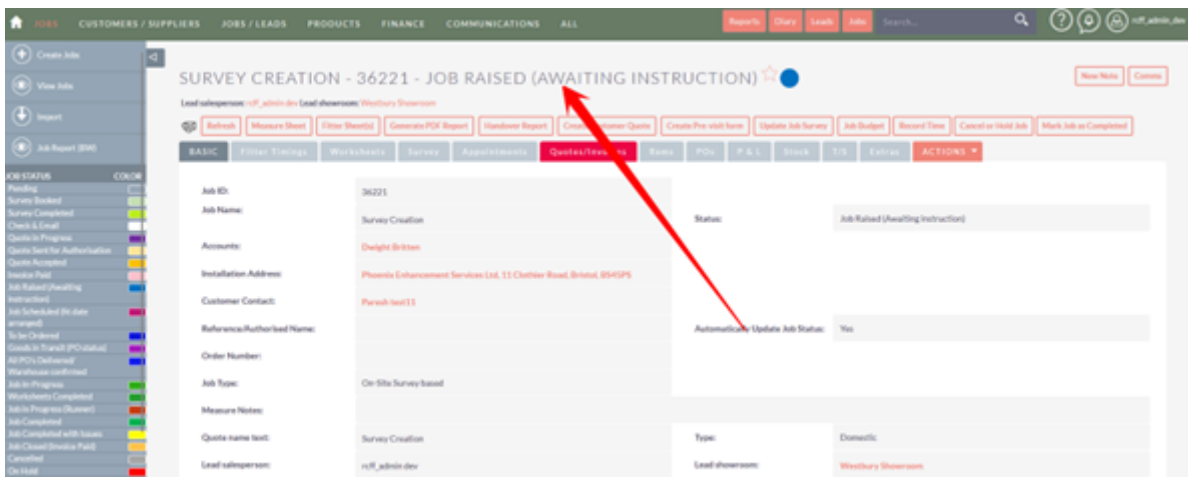


Book a Fitting

Once a quote has been accepted the salesperson will automatically receive an email to confirm this.

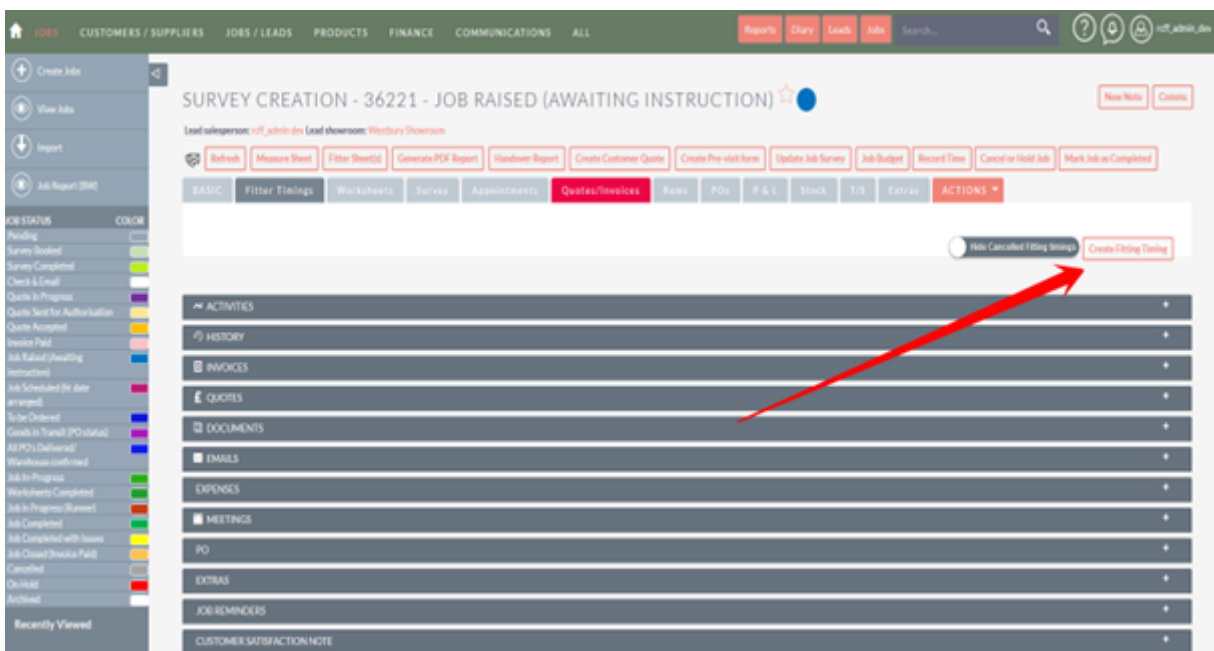
The job status will automatically update to “Job Raised Awaiting Instruction”



The screenshot shows a software interface for job management. The main heading is 'SURVEY CREATION - 36221 - JOB RAISED (AWAITING INSTRUCTION)'. Below this, there are several tabs: 'Basic', 'Fitter Timings', 'Worksheets', 'Survey', 'Appointments', 'Quotes/Invoices', 'Risks', 'POs', 'P & L', 'Stock', 'T/S', 'Extras', and 'ACTIONS'. The 'Basic' tab is currently selected. The form contains fields for 'Job ID' (36221), 'Job Name' (Survey Creation), 'Status' (Job Raised (Awaiting Instruction)), 'Accounts' (Dwight Britton), 'Installation Address' (Phoenix Enhancement Services Ltd, 11 Clouthier Road, Bristol, BS40PS), 'Customer Contact' (Parash Tewari), 'Reference/Authorized Name', 'Order Number', 'Job Type' (On Site Survey based), 'Measure Notes', 'Quote name text' (Survey Creation), 'Type' (Domestic), 'Lead salesperson' (rff_admin_dev), and 'Lead showroom' (Woodbury Showroom). A red arrow points to the 'Status' field.

Once you have arranged a date with the customer for a ‘Fit Date’ you can book this.

Job > Fitter Timings > Create Fitting Timing



The screenshot shows the same software interface, but with the 'Fitter Timings' tab selected. The 'ACTIONS' dropdown menu is open, showing options: 'Hide Cancelled Fitting Timings' and 'Create Fitting Timing'. A red arrow points to the 'Create Fitting Timing' button. The 'ACTIONS' menu is also open, showing a list of activities: 'ACTIVITIES', 'HISTORY', 'INVOICES', 'QUOTES', 'DOCUMENTS', 'EMAILS', 'EXPENSES', 'MEETINGS', 'PO', 'EXTRAS', 'JOB REMINDERS', and 'CUSTOMER SATISFACTION NOTE'.

Complete the fitter timing criteria

