Job Details Screen - How To's (***Incomplete***)

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Help Topics

The **Job Details** screen is a comprehensive screen that displays every significant information about a Job record all on one screen. It is divided into three (3) main sections to organize data and functions:

Main Fields (section)

- **Organization Name**
- **Contact**
- **Short Description**
- **Last Result**
- **Job Orig Date** (Job Original Date)
- **Exp Comp Date** (Expected Completion Date)
- **Completed / Date Entered By**
- **Last Contact Date**
- **Next Contact Date**

- **Priority**
- **Job #**
- **Type**
- **Status**
- **Assigned To**
- **Job Value**
- **Est Time** (Estimated Time)

Tabs (section) - *see below.*

Footer (section)

New Job (button) - To create a new Job record.
New Task (button) - To create a new Task related to that Job record.
Delete Job (button) - To delete that Job.
Save (button) - To save the actions/changes made on that screen.
Help (button) - Leads you to self-help articles about the **Job Details** screen.
Close (button) - To close that screen.

Shortcut Key: **Ctrl + F2**, or
On the **Quick Start Menu**, click the + icon and select **Job,** or
Click the **New** button on the lower left part of the **Job List** screen, or
Click the **New Job** button on the lower left part of the **Job Details** screen.

On the **Job List** screen, click the **Edit** button and click on any particular Job record that you prefer to edit (Note: Any changes made will be automatically saved), or
On the **Job Details** screen, make the necessary changes then click **Save** (lower right part of the screen).

Using **Shortcut Key**: **F2,** or
On the **Quick Start Menu**, click the **Search** (magnifying glass) icon then select **Jobs**, or
(If already on the **Job List** screen) use the Search feature (magnifying glass icon) to type the Job ID or any information/keywords to filter multi search, or
On any **Customer Details** screen under **Jobs** tab, click on the **Magnifying Glass** icon under the **Action** column.
On any **Sales Order** screen, click on the **Magnifying Glass** icon under **Job ID** column (rightmost column).

Shortcut Key: **Shift+F2**, or
On the **Quick Start Menu**, click the **List** button and select **Jobs**, or
On the **Main Menu Bar**, click **Jobs.**

On the **Job List** screen, check the box/es (first column on the left) to select one or more records then click **Batch Actions** button and select **Delete Selected**, or
Click the first box (topmost, on the fields row) to either select all records on a page or all records on the entire list then proceed with deletion, or
On the **Job Details** screen, click **Delete Job** button (lower left part of the screen).
(Note: To preserve the integrity of the database, you cannot delete any Job record that has been used on any of the screens such as Sales Order, Invoice, Credit Memo, etc.)

On the **Main Menu Bar**, click on **Reports > Jobs.**

Define your Report.

- **1place** allows you to generate different types of Job Reports according to your needs. Pick from the type of Job Report (i.e. Jobs, Jobs Task & Email) from the **Reports section.**
  - Note: You can adjust the period covered by your report. On the **Report Period** filter section, select from the **drop down** filter lists or manually input the dates 'from' and 'to'.

Click on **Run Report**.

- Note1: There is an option to further customize your Report by clicking the **Gear** (gray) icon to make the **Report Lists Settings popup** screen appear. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
- Note2: At this point, you may choose to **Print**, **Email** or **Download** your Report copy.

After doing the instructions above, click on the **Customize** (blue) button to further modify and save your newly created Report.

On the **Customize Report popup** screen:

- (Optional) Select the **Min Access Level** from the **drop down** icon.
- (Required) Type in the **Report Name** (whatever you want to call your Report).
- (Optional) Type in any **Report Description**.
- (Optional) Check the box if you want to **Make Report Private** and/or **Favorite**. Check or uncheck box(es) of the column(s) that you prefer to show/hide.
- Click on **Save.**
- Note1: This Report will appear on the list of **Custom Reports** and on **My Favorites** if you checked the **Favorite** box.
- Note2: You can always edit or update any Custom Reports. Go to **Reports** > **Custom Reports** and click on the **Pencil** icon (under **Actions** column). Do the necessary changes and click on **Update**.
- Note3: Click on the **X** button to permanently delete any Custom Report from the list.

Note: You have the option to **Email**, **Print** or **Download** a Report copy (see instructions below).

On the **Job List** screen:

- Select the record(s) by checking the box(es) .
- Click the

  button to Print and

  to download (in Excel form).
- There is also an option to Share

  record(s) and this feature will be available in the future.

For Job Reports, go to **Main Menu** Bar > **Reports** > **Jobs,** create your Report (*see previous instructions) then click on the

button (upper right).

The **Print Preview** popup screen will appear. (Note: You cannot preview on the screen if you selected more than 5000 records.)

- <u>**DOWNLOAD COPY**</u>: Click on

button (upper right) to download the Report. Save in your PC.
EMAIL COPY: Click on

Send Email

button (lower right) to send a copy of the Report through email. Create the body of the Email and input other necessary details on the left side of the **Email popup** screen. Click on

Send Email

button (lower right).
PRINT COPY: Click on

button (upper right) to print the Report. Adjust Print Settings then click on

Print

button (lower right).

This tab shows a complete history of all email correspondences related to a particular Job (all in 1 place) without having to open each individual task on the Tasks Tab (to check any progress, easily get the big picture and manage a Job).
You can utilize this tab to create your email. Following are some buttons to help you navigate:

- - Click on the **Reply** button to show the **EMAIL popup** screen and send a reply.
- - Click on the **Forward** button to show the Email popup screen and forward the email correspondences to people you want notified.
- - **Reply All** button.
- Add Note With Date/Time Stamp

  - Click on the **Add Note With Date/Time Stamp** to manually add notes (with your name, exact date and time created and the Job #) in between email correspondences. This is an added feature that will help you write important notes on the JobFeed field about some progress and events that transpired (in case not mentioned in emails, and you need to record them).
- **Search** button (right side, above the email field) - Enter any keyword to easily search for past email correspondence topics.

This tab contains:

- **Search** button - Enter any keyword (multi-search filter) to easily search for a Task related to a particular Job record.
- **Task List** table with the following information (fields/columns):
  - **Acknowledged**
  - **Task Completed**
  - **Task Number**
  - **Type**
  - **Date**
  - **Time Entered**

    - **Entered By**
    - **Assigned To**
    - **Subject**
    - **Task Description**
    - **Results / Notes**
    - **Date / Time Completed**
    - **Hrs**
    - **From Email**
  - **Notes**
    - You can select which columns you want to be displayed on the Task List table by clicking on the **Gear** button (above, right of the table) and checking the fields to select.
    - You can define column widths and locations (using drag and drop). You can also sort the Tasks by clicking on the **Sort** icon and decide wherever you want to place it on the **Task List** table. (Your settings will be autosaved as 1place remembers each setting per User.)
    - You can add a new task by pressing the **New Task**
      

      button. (This will display the **Add New Task** popup screen with all details).
    - You can add a new task to the list by simply typing a new task at the bottom of the list. The following fields are automatically filled:
      - **Task ID**
      - **Job ID**
      - **Company Name**
      - **Contact Name**
      - **Date/Time Created**
      - **Date**

You can set the Jobs record numbering. Go to **Settings** > **System** > **Record Numbering**.
You may choose to set the **Number Type** either **Manual** or **Sequential**.
You may place a letter **Prefix** to make the Jobs record number alphanumeric (for example, 'J' to easily determine the type of Record).
Place a number code under the **Next Number** column to set the next number (if you are starting the sequential Number Type).