Jobs & Projects - How To's (Incomplete)

Last Modified on 08/19/2026 11:05 pm EDT

Job & Project Tracking - Overview (Read This First)

- **NOTE**: If your company simply buys, sells, and ships 'products' to your customers then using the the **Jobs & Projects** tracking system may not be necessary for your company. On the other hand, if your company provides any types of services, or installation of products, or has a very complex sales cycle, or needs to track a lot of details about your customers, etc., then you may want to use the Job & Project tracking system in OneSource.
- In general the following is a brief overview of how you would set up the Jobs & Projects tracking system for your company:
  - The first step is to determine the different 'Types' of Jobs & Projects you want to track. For instance, a software company might want have a lot of details to track about each Sales Lead. They might also want to track each request for support (such as each Question or Problem, Bug, Customization Need, etc). So, in this case, they may want to set up 2 Job Types:
    - Sales Lead
    - Support Request
  - Next, you may want to setup of 1 or more Job 'Sub-Types'. In the example above there are 3 types of 'Support Requests', so they may want to set up the follow types of Sub-Types related to Support Request type Jobs:
    - Question/Problem
    - Bug
    - Customization Need
  - Next, you may want to setup 1 or more Job Type 'Statuses'. When a Job or Project has various statuses it usually goes through (to be completed) it usually makes sense to create a job status for each of those statuses--so you can quickly see which Jobs are in which status. The following are examples of Statuses that could be set up for the 2 types of Jobs above:
    - Sales Lead
      - New Lead
      - To Contact
      - To Quote
      - Waiting for Order
      - New Customer - Prelive
      - New Customer - Live
    - Support Request
      - New SR
      - Assigned
      - In Progress
      - Redo
      - Closed
  - Next, you may want to add new fields for each Type of Job. In the example above, you may want to set up fields like these for a new Sales Lead (assuming you were an CRM/accounting software company):
    - Current accounting software
    - Current CRM software
    - Current Document Management software

    - # of Users
    - Track Inventory (Y/N)
    - Etc...
  - Lastly, you may want to enable the various options to auto create (or update) a new Job (sometimes called a 'Ticket') when customers sends you an email.

The sections below will explain how to do the steps outlined above (based on your own company's needs).

Job Types, Statuses, and Custom Fields

Setting up Job Types

- Click the **Gear** icon (in the top right corner) > **Settings** > **Jobs & Projects**.
- For each Job Type enter values in the Job Type and Description fields.

Setting up Job Sub-Types

- Click the **Gear** icon (in the top right corner) > **Settings** > **Jobs & Projects**.
- Click the **Add/Edit Job Sub-Types** button.
- Select the **Job Type**. (Note: Each Job **Sub-Type** is related to a particular Job **Type**).
- Next enter a **Job SubType** (Note: You may want to make this a 1-2 letter abbreviation for the Job Type). Then type the **Description** of the Job.
- Click **Save**.

Setting Up Job Statuses

- Click the **Gear** icon (in the top right corner) > **Settings** > **Jobs & Projects**.
- Click the **Add/Edit Job Sub Status** button.
- Select a **Job Type** and then enter a **Job Status** and **Description**.

Setting Up Job Custom Fields

Job List Settings

Job Email Settings

DO THIS STEP FIRST

- Step 1: Determining if email inbox has OLD emails in it. If you are going to enter an existing support email address such as **support@yourcompany.com** you need to determine if the email box has 100's or 1,000's of email (from the past) in its inbox. In many cases this type of email inbox is shared and may have all emails ever sent to it STILL in the inbox. Log into the email inbox directly and determine if this is the case. If so continue on to Step 2.
- Step 2:
  - In the OneSource **Job Email Settings** section (Gear > Settings > Jobs / Projects) be sure to UNCHECK the option called: Auto Create New Job form Mail.

    - In the OneSource **Email Templates** section (Gear > Settings > Jobs / Projects) click on the pencil icon next to the **Support request created** template and DELETE all text in the template (if text exists).
- <u>Step 3</u>: Delete ALL old emails from the support inbox above--so OneSource does not try to automatically create Jobs and Send Emails out for each of the emails in the inbox. (You may want to set up the support account as an additional email the gets pulled into your mail client, such as Outlook, so you can delete the emails in mass much quicker than on a web browser.
- Step 4: Change the settings on Step 2 BACK in preparation to begin using the emailing system.

Email Templates