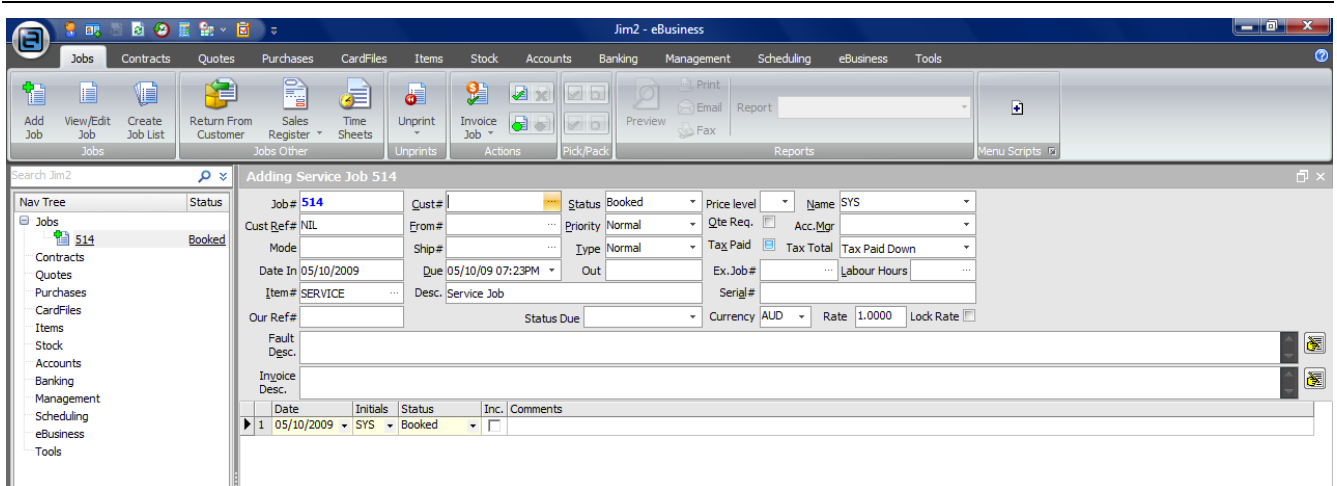# Jim2 Business Engine Training

Adding a Service Job.

Who: **All users, all sites.**

Describe: Add a basic service job, including the applicable customer Card Code.

Context: Jobs in Jim2 are used to manage the "workflow" of a business, and adding a job commences this workflow.
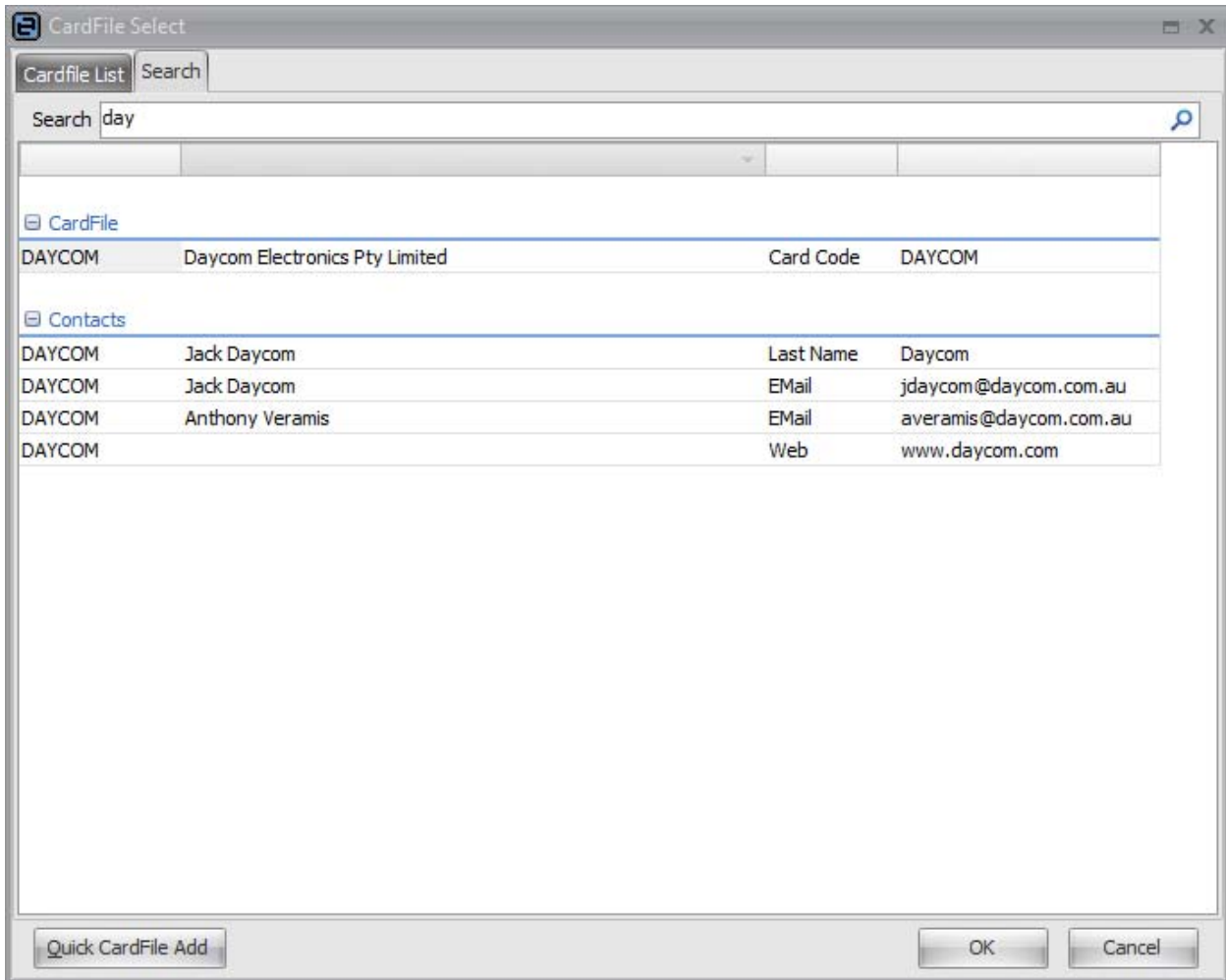

Skill Steps:

1.   Select the Job tab from the top of the Jim2 window.

2.   Click Add Job in the Ribbon. The cursor will move to the Cust# field.

3.   Click the Cust# "browse button" (the three little dots).

browse button
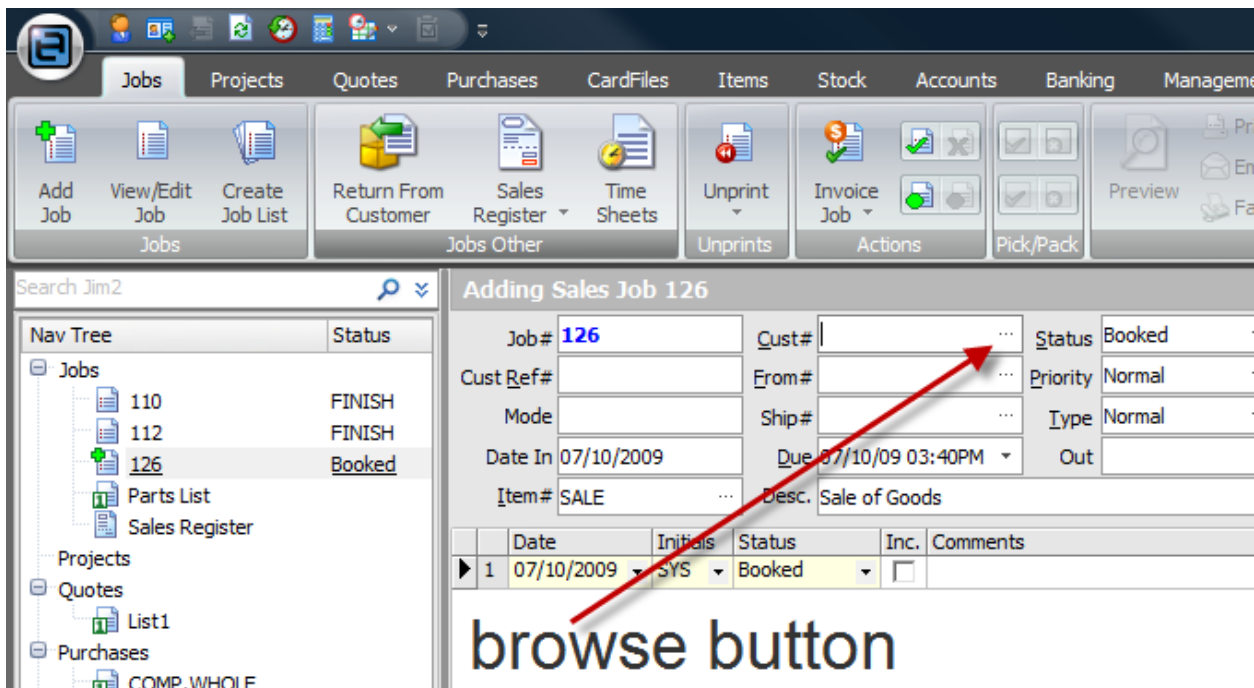
4. Enter a key word from the CardFile name or address. In this example, we use 'day'.

5. Press <<Enter>>.

6. Double click on the CardFile of choice, or (if the required CardFile does not exist in the database), click on Quick CardFile Add and complete the fields. Click Save.

7. Press <<Enter>>. Note the From# and Ship# fields will populate and the cursor will move to Cust Ref#.

8. Enter Cust Ref# (Customer order reference).

9. Press <<Enter>>.

10. Click on the Item# browse button (ellipsis).

11. Double click on the applicable Item# (Service).

12. Press <<Enter>>.

13. Edit the Description field, if applicable.

14. Press <<Enter>>.

15. Enter a serial number in the Serial# field, if applicable.

16. Press <<Enter>>.

17. Enter a Fault Description.

18. Click Save.