

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.

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Stock Accounts Banking Management Scheduling eBusiness Tools		Pault Desc. Inyoice Desc. ▶ 1 05/10/2009 → SYS	Status Inc. Comments Booked •	

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).

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Jobs		Cust <u>R</u> ef#		<u>F</u> rom	#	<u> </u>	Priority	Normal
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Purchases	Drowse button							
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4. Enter a key word from the CardFile name or address. In this example, we use 'day'.

5. Press <<Enter>>.

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Cardfile List	Search			
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CardFile				
DAYCOM	Daycom Electronics Pty Limited	Card Code	DAYCOM	
Contacts				
DAYCOM	Jack Daycom	Last Name	Daycom	1
DAYCOM	Jack Daycom	EMail	jdaycom@daycom.com.au	
DAYCOM	Anthony Veramis	EMail	averamis@daycom.com.au	
DAYCOM		Web	www.daycom.com	
Quick Cardi	File Add		OK Cano	el

- 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.
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