

Job Management Letter/Note Template

Where to find Job Management Letter Templates

There are two places within the Job management where you can pull in templates to record job information and Notes. These templates are set up in CRM Module.

CRM > Configuration > Email Template

- Use the email drop-down below to filter the Job Management templates.
- Click "Add" to add a new template

CRM

Configuration

- Check List Template Setup
- Check List Groups
- Check List Questions
- Interaction Types
- Website Support Groups
- Website Support Forms
- Support Log Ticket Setup
- Contract Maintenance
- Time Tracker Config
- Inventory Setup
- Debtors Setup
- Build Task Setup
- Quote Template Setup
- Expense Setup
- Sales Lead Setup
- Email Templates**

Email Template Letters

Search **Add** Edit Delete Print

Code: Email Type:

Description:

Active: ☒

Page 1 of 1 Remove Paging: ☐

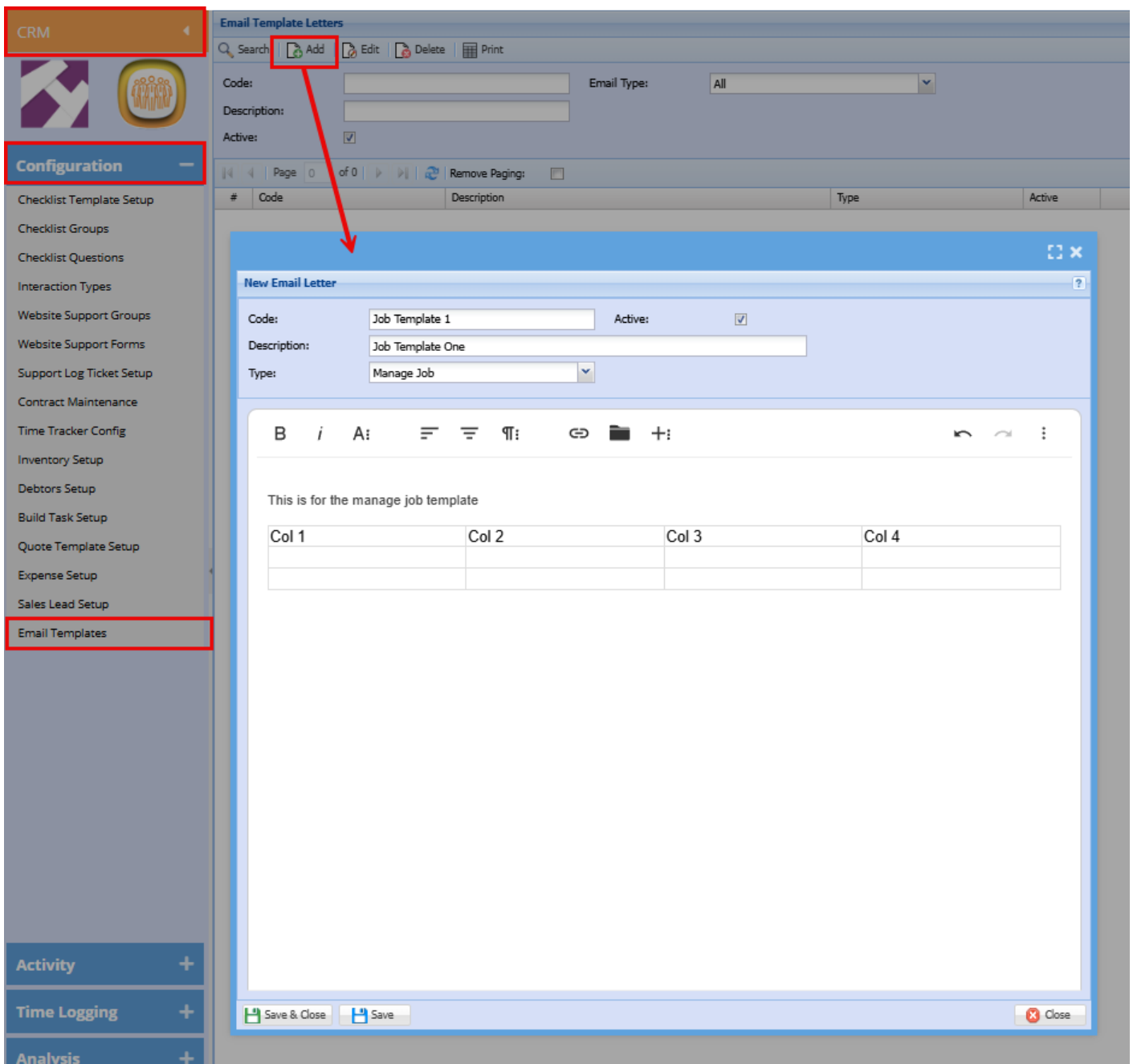
#	Code	Description	Customers	Suppliers	Job Management	Job Receive Stock	Active
1	Newsletter Oct 2024	Barcode Products Newsletter Oct 2024	Customers				Yes
2	Nov 2024 Newsletter	Barcode Productions Nov 2024 Newsletter	Customers				Yes
3	ChrisImageTest	See if images are saved	Customers				Yes
4	Newsletter October	The Flower Co. - October Newsletter	Customers				Yes
5	Job Template 1	Job Template One			Job Management		Yes
6	Customer Notify	Customer Notify of stock received				Job Receive Stock	Yes

Creating a new Template for Job Managing

Add the below for your template as shown below:

- **Code**
- **Description**
- Choose the type "**Manage Job**"

- Add your template, here you will be able to design your template by adding text, images, grids, links etc.
- Click "**Save & Close**"



Where to Add a Job Management Letter Templates

Job costing has two locations where the templates can be pulled in.

Job Costing Module > Activity > Manage Job

- Search for the job you are wanting to add a template to.

Job Costing Module

Configuration

Activity

- New Quote
- Quotation
- Bookin
- Manage Job**
- Job Lines
- Planned Timelog Schedule
- Job Schedule Activity
- Time Tracker Exports
- GRV to Job
- Picking Slip
- Job Total Analysis
- Job Delivery Note
- Job Invoice
- Collect / Deliver

Job Search

Search Manage Job Overview Start Job New Job Create Reminder Ready For Invoice Functions Print

Basic Search Custom Search Expand

Job Number: job1080 Short Description:

Customer From: Customer To:

Quote Number: Order No:

Date Type: Start Date Job Status: All

Date From: Date To:

Page 1 of 1 Remove Paging: Total Budget: 1 145.00 Total Actual: 0.00 Total Invo

#	Att	Memo	Due	Job Status	Team	Info	WIP O/S	% Completed	Completion Date	Delivery Date	Start Date	Approved Date	Job No
1							2		2026-04-10	2026-04-13	2026-04-08	2026-04-08	JOB1080

Notes (Add template here)

- **Double Click** on the job line to open the job
- Click on "**Notes**"
- Click on "**From Template**" a widow will open with a dropdown
- Select your template from the dropdown to populate the text box.

Manage Job

Search Memo Attachments Create Reminder Info Workflow Ready For Invoice Functions View Doc Print Doc Print Reports Save Close

JOB1080 Started ABC Company Days to Completion: 0

Header

All Job Lines Stock Service Custom Tasks

Basic Filter Functions Date Details Address Shipping / Link Progress Custom

JOB1080 ABC0010 QT312 Short Description: New job for blinds Team: Alerts

Completed: 11% 0% Reference:

Charge Up (SC): Assembly: Order No: malcolm

Prepriced (CTC): Internal Job: Sales Rep: DFAI FR

Sub Job Link: Status/Position: Asset Item:

Comment:

Manage Sales Docs Purchase Docs Scheduling

Job Lines Planned Time Job Line History Sub Job Link BOM Links **Notes**

Save Print From Template

Copy From Template

Template: Job Template 1

Page 1 of 1

Save & Close Close

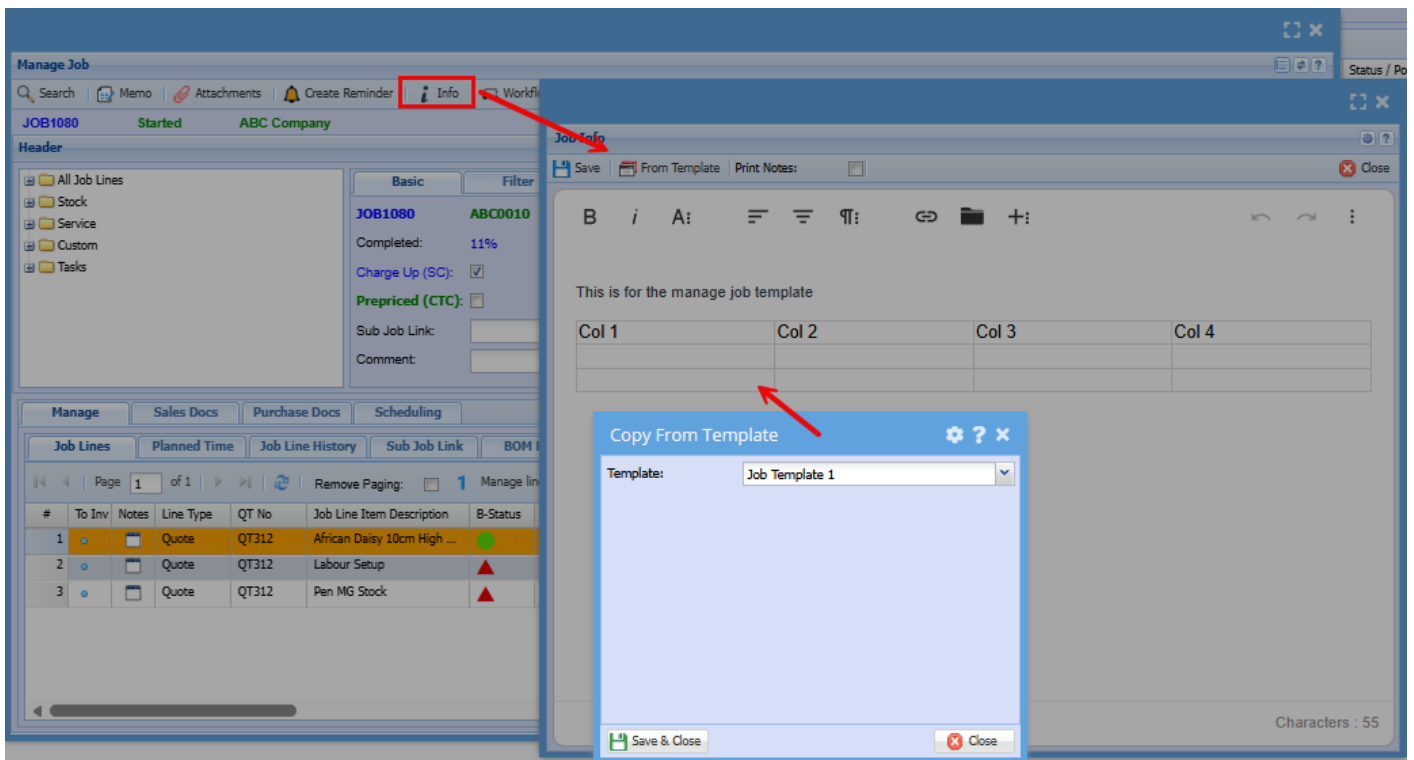
This is for the manage job template

Col 1	Col 2	Col 3

Characters : 55

Info (Add template here)

- Click on "**Info**"
- Click on "**From Template**" a widow will open with a dropdown
- Select your template from the dropdown to populate the text box.



Revision #1

Created 14 June 2026 23:59:18 by Pamela

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