

Job Search Screen Explained

Job Search Screen

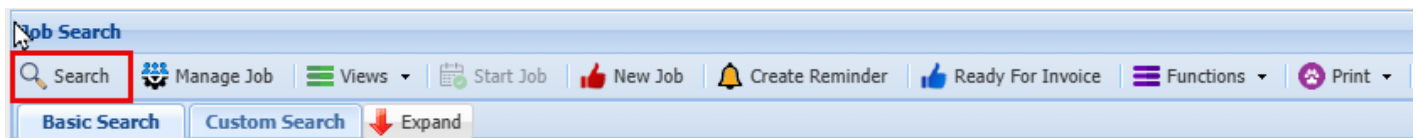
Searching for Jobs - **Job Costing** > **Activity** > **Manage Job**

This screen is used to find and review jobs within the Job Costing Module. It includes a variety of filters at the top that allow users to quickly search for jobs using whatever information they have available. These filters provide flexibility, enabling users to perform broad searches with minimal details (such as a name or date) or narrow searches using specific criteria.

This area only searches for Jobs with a Job status of

- Not Started
- Started
- In Progressing

Search Button



The **Search** button is used to run the search once you have entered your desired criteria.

After selecting or entering the relevant filters (such as job number, customer, date range, or status), clicking **Search** will display all jobs that match those criteria in the results grid below.

Basic Search Tab

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

Job Search

Search
Manage Job
Views
Start Job
New Job
Create Reminder
Ready For Invoice
Functions

Basic Search
Custom Search
Expand

Job Number:
Customer From:
Quote Number:
Date Type:
Date From:

Short Description:
Customer To:
Order No:
Job Status:
Date To:

Page 1 of 1
Remove Paging:
Total Budget: 81 997.67
Total Actual:

#	Att	Memo	Due	Job Status	Team	Info	WIP O/!	% Comple	Completion Date	Delivery Date	Region	Start Dat
1									2026-05-21	2026-05-26	Gauteng	2026-05-
2									2026-05-21	2026-05-28	Pretoria	2026-05-
3							4		2026-05-12	2026-05-12	Pretoria	2026-05-
4								100%	2026-05-11	2026-05-10	Cape Town	2026-05-
5								100%	2026-05-27	2026-05-20	Gauteng	2026-05-
6							2	61%	2026-04-10	2026-04-24	Gauteng	2026-04-
7							1		2026-04-23	2026-04-30	Pretoria	2026-04-
8							3		2026-04-30	2026-04-29	Centurion	2026-04-
9							4		2026-04-28	2026-04-28	Pretoria	2026-04-

Job Number	If you know the exact job reference
Customer From / To	Filter jobs for a specific customer or range of customers
Quote Number	Locate jobs linked to a specific quote
Order Number	Search using the related order reference
Short Description	Search by keywords describing the job
Date Type	Choose which date you want to filter by (e.g., Start Date)
Date From / Date To	Define a date range to refine results
Job Status	Filter by status (e.g., All, Active, Completed)

Job Search Grid Columns Explained

Job Costing > Activity > Manage Job

- Click **Search**

The Job Search screen displays results in a grid format. Each row represents a job record, and the columns provide key information about that job.

Job Costing Module

Configuration

Activity

Job Search

Search

Manage Job

Views

Start Job

New Job

Create Reminder

Ready For Invoice

Functions

Print

Basic Search

Custom Search

Expand

Job Number:

Customer From:

Quote Number:

Date Type:

Date From:

Short Description:

Customer To:

Order No:

Job Status:

Date To:

Page 1 of 1

Remove Paging

Total Budget: 73 539,54

Total Actual: 0,00

Total Invoice:

Displaying 1 - 21 of 21

#	Alt	Memo	Due	Job Status	Team	Info	WIP O/S	% Comple	Completion Date	Delivery Date	Region	Start Date	Approved Date	Job No	Quote	Code	Customer	Des
1								100%	2026-03-24	2026-03-30	Cape Town	2026-03-25	2026-03-24	JOB5293	501727501835	STO001	Stonewood Ho...	d
2							10	14%	2026-04-02	2026-04-01	Pretoria	2026-03-26	2026-03-26	JOB5296	501727501839	SAS	Sound And Sec...	Tr
3							10		2026-04-02	2026-04-02	Pretoria	2026-03-26	2026-03-26	JOB5295	501727501838	SAS	Sound And Sec...	Tr
4							2		2026-04-06	2026-04-02		2026-03-26	2026-03-26	JOB5294	501727501836	1172	IMRAAN NEW	Tr
5							1		2026-03-25	2026-03-25	Pretoria	2026-03-26	2026-03-18	JOB5292	501727501834	1008	ACE Traders	te
6									2026-04-20	2026-04-14	Gauteng	2026-04-07	2026-04-07	JOB5297	501727501841	ABC001	A & B Construct...	N
7							2		2026-05-20	2026-04-15	Gauteng	2026-04-08	2026-04-08	JOB5298	501727501842	ABC001	A & B Construct...	N
8									2026-06-08	2026-04-14	Cape Town	2026-04-13	2026-04-08	JOB5299	501727501843	ABC012	ABC next comp...	te
9							3		2026-04-17	2026-04-24	Pretoria	2026-04-17	2026-04-17	JOB5300	501727501847	SAS	Sound And Sec...	S
10							4		2026-04-28	2026-04-28	Pretoria	2026-04-21	2026-04-21	JOB5302	501727501849	SAS	Sound And Sec...	P
11								56%	2026-04-22	2026-04-25	Cape Town	2026-04-21	2026-04-21	JOB5301	501727501848	CMS-SALVAGE	CMS Salvage Co	E
12							1		2026-04-23	2026-04-30	Pretoria	2026-04-23	2026-04-23	JOB5305	501727501851	SAS	Sound And Sec...	O
13							2	61%	2026-04-10	2026-04-24	Gauteng	2026-04-24	2026-04-24	JOB5306	501727501852	ISO09	IS LEAD	tr
14								100%	2026-05-11	2026-05-10	Cape Town	2026-05-04	2026-05-04	JOB5308	501727501858	IMR001	Imraan Test Acc	te

The grid is **customisable**, allowing users to choose which columns are visible based on their needs.

Customise columns in the grid:

- Hover your mouse over any **column header** in the grid
- A **downward arrow** will appear on the right-hand side of the header
- Click on this arrow to open a menu
- Select **“Columns”** from the list
- A full list of available column options will then be displayed
- Tick will show a column or untick to hide it

Job Search

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Basic Search

Custom Search

Expand

Job Number:

Customer From:

Quote Number:

Date Type:

Date From:

Short Description:

Customer To:

Order No:

Job Status:

Date To:

Page 1 of 1

Remove Paging:

Total Budget: 73 539.54

Total Actual:

#	Att	Memo	Due	Job Status	Team	Info	WIP O/	% Comple	Completion Date	Delivery Dat	Region	S
1							1		2026-06-10	2026-06-17		
2									2026-06-13	2026-06-14		
3									2026-05-21	2026-05-28		
4							4		2026-05-12	2026-05-12		
5								100%	2026-05-11	2026-05-10		
6								100%	2026-05-27	2026-05-20		
7							2	61%	2026-04-10	2026-04-24		
8							1		2026-04-23	2026-04-30	Pretoria	20
9							2		2026-04-30	2026-04-29	Centurion	20
10							4		2026-04-28	2026-04-28	Pretoria	20
11								56%	2026-04-22	2026-04-25	Cape Town	20
12							3		2026-04-17	2026-04-24	Pretoria	20
13									2026-06-08	2026-04-14	Cape Town	20
14							2		2026-05-20	2026-04-15	Gauteng	20
15									2026-04-20	2026-04-14	Gauteng	20
16							10	14%	2026-04-02	2026-04-01	Pretoria	20

Sort Ascending

Sort Descending

Columns

Group by this field

Show in groups

Status

Delivery Address 1

Delivery Address 2

Asset

Division

Reopened

Assembly

Job Link

Payment / Retention

Est Start Date

Invoice Group

Charge Up

Project

Prepriced

BOM

BOM Item

Activity Group

Internal Job

Job Manager

Comment

Budget Selling

Actual Selling

Variance

Reordering Columns

- Columns can also be rearranged to suit your preferred layout
- Simply **click and hold a column header**, then **drag and drop it** into the desired position
- This allows you to organise the grid in a way that best fits your workflow

Status	Displays the current status of the job
Delivery Address 1 / 2	Shows the delivery location details
Asset	Links the job to a specific asset, if applicable
Division	Indicates the business division associated with the job
Reopened	Identifies jobs that have been reopened after completion
Assembly	Indicates if the job involves assembly components

Job Link	Provides a reference or link to related jobs
Payment / Retention	Displays payment or retention-related information
Estimated Start Date	Planned start date for the job
Invoice Group	Groups jobs for invoicing purposes
Charge Up	Indicates whether the job is chargeable
Project	Links the job to a broader project
Prepriced	Shows if pricing has been predefined
BOM / BOM Item	Displays Bill of Materials and related items
Activity Group	Categorises the job under a specific activity
Internal Job	Flags jobs that are internal (non-customer facing)
Job Manager	Shows the person responsible for the job
Comment	Allows for additional notes or remarks
Budget Selling	Budgeted revenue for the job
Actual Selling	Actual revenue recorded
Variance	Difference between budget and actual values
Invoiced Selling	Amount that has been invoiced
Memo	Additional internal notes or messages
Att (Attachments)	Indicates if documents or files are attached to the job
Due	Displays due dates or overdue indicators
Job Status	Current status of the job (e.g. in progress, completed)
Team	The team assigned to the job
Info	Additional job-related information or quick access details

WIP O/S (Work in Progress Outstanding)	Value of work still in progress
% Completed	Progress percentage of the job
Completion Date	Date the job was completed
Delivery Date	Scheduled or actual delivery date
Region	Geographic area linked to the job
Start Date	When the job began
Approved Date	Date the job was approved

Expanded Search Fields

When the **Expand (Contract)** option is selected, additional search filters become available. These provide more advanced ways to refine your search results.

Job Search

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

Basic Search
 Custom Search
 Expand

Job Number:

Customer From: ▾

Quote Number:

Date Type: ▾

Date From: Yr-

Short Description:

Customer To: ▾

Order No:

Job Status: ▾

Date To:

Job Search

Search
Manage Job
Views
Start Job
New Job
Create Reminder
Ready For Invoice
Functions

Basic Search

Custom Search

Contract

Job Number:

Customer From:

Quote Number:

Date Type:

Start Date

Date From:

2021-04-09

Yr-

Short Description:

Customer To:

Order No:

Job Status:

All

Date To:

2026-06-09

Status / Position:

All

Division:

All

Region:

All

Project:

All

Payment / Retention:

All

Reference:

Asset Item:

All

Order By:

Assembly:

All

Charge Up:

All

Prepriced:

All

Job Manager:

All

Inv Group:

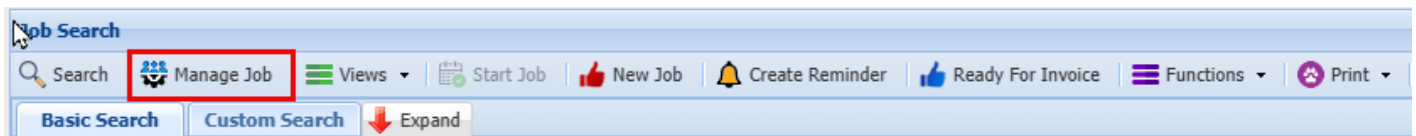
Status / Position	Filter jobs based on their current status or stage within the workflow
Division	Search for jobs linked to a specific business division
Region	Narrow results by geographic location or branch
Project	Locate jobs associated with a particular project
Payment / Retention	Filter based on payment terms or retention details
Reference	Search using any external or internal reference number
Asset Item	Find jobs linked to a specific asset or item
Order By	Sort the results based on selected criteria (e.g., date, job number)
Assembly	Filter jobs related to specific assemblies or grouped components
Charge Up	Identify jobs based on charge-up rules or settings
Prepriced	Filter jobs that have predefined pricing applied
Job Manager	Search for jobs assigned to a specific manager
Invoice Group (Inv Group)	Locate jobs grouped for invoicing purposes

These additional filters are especially useful when:

- **Working with large volumes of jobs**
- **Needing to pinpoint very specific records**
- **Performing reporting or detailed analysis**

They allow users to move beyond basic searches and **fine-tune results with greater accuracy and control**.

Manage Job Button

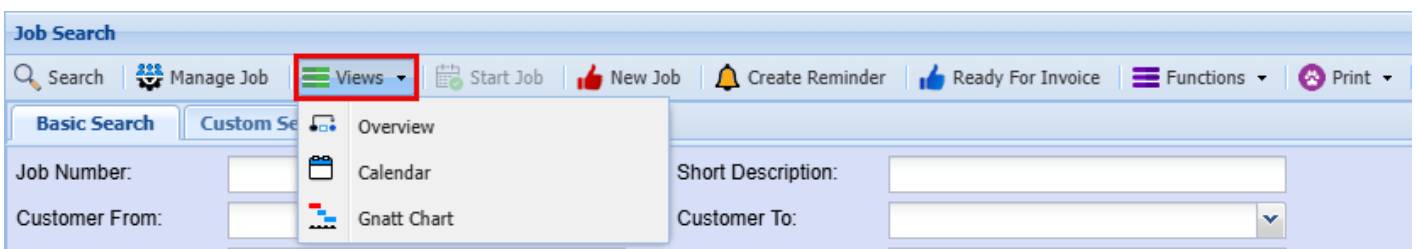


The **Manage Job** button (highlighted in the toolbar at the top) is used to **open a selected job into the full job management screen**.

- To use this button:
 1. Highlight a job line from the results grid below
 2. Click **Manage Job**
 - This will open the **Manage Job screen**, where you can:
 - View full job details
 - Update job information
 - Manage tasks, timelines, and progress
 - Access related documents and financials
-

Views Button

The **Views** button allows users to change how the job information is displayed after running a search. Instead of only viewing jobs in a standard list, users can choose different layouts depending on their needs.



• Overview Option

This screen allows you to control how the Job Workflow overview is displayed, helping you plan and track jobs over a selected time period.

Click the **Search button (magnifying glass icon)** at the top of the screen to open the search fields.

Job Workflow



View: Estimated Start Date

Column Width: 250

Date From: 2026-05-08

Date To: 2026-07-08

Debtor:

Debtor:

View: 1 Week

Start Date: 2026-06-08

Search

Close

Clear

This screen allows you to control how the **Job Workflow overview** is displayed, helping you plan and track jobs over a selected time period.

View	The first View dropdown lets you choose which date the workflow is based on: - Estimated Start Date - Completion Date - Delivery Date This determines how jobs are positioned and displayed in the workflow timeline.
Column Width	- This setting controls the width of the columns in the workflow display. - Increasing the value makes columns wider, while decreasing it makes them narrower. Useful for adjusting the layout to fit your screen or improve readability.
Date Range (Date From / Date To)	- Defines the overall date range of jobs to include in the workflow. - Only jobs within this selected period will be displayed.

Debtor Filter	- Used to filter jobs for a specific customer (debtor). - If left blank, the system will display all jobs. - If a customer has multiple jobs, you can select them here to narrow down the results.
View (Duration)	The second View option controls how far ahead you can plan: - You can display the workflow for up to 12 weeks in advance This helps with forward planning and scheduling.
Start Date	- Defines the starting point of the workflow view - This is typically set to today's date, but can be adjusted if needed
Action Buttons	- Search – Applies the selected filters and displays the workflow - Close – Exits the screen - Clear – Resets all fields

Once you have applied your desired filters and clicked **Search**, the results screen will appear as shown below.

This screen displays the results of your search in a **workflow (timeline) view**, organised by date.

Each column represents a specific date, and the jobs returned from your search criteria are displayed under their scheduled or estimated start dates.

Job Workflow - EstimatedStartDate

Fit fire s...

● 0%

MG ACCK

2025-05-09 Fri (Del)

2025-05-02 Fri (Comp)

Air BNB 01 - AIRBNB01

▲ JOB1061 Started

Memo Att Team

CS, CB

Job test ti...

● 0% MG

MG

2025-04-07 Mon (Del)

2025-04-07 Mon (Comp)

Air BNB 01 - AIRBNB01

▲ JOB1060 Started

Memo Att Team

CS, CB

Second dis...

● 0% MG

MG

2026-06-11 Thu (Del)

2026-06-11 Thu (Comp)

ABC Company - ABC0010

▲ JOB1085 Not Started

Memo Att Team

CS, CB

Key Features:

Job Display – Each job appears as a card showing key details such as:

- Job name or description
- Job number
- Status indicators (icons and colours)
- Start and completion dates
- Assigned team

Date-Based Layout – Jobs are arranged in columns by date, making it easy to see what work is scheduled on each day.

Drag-and-Drop Functionality – Users can click and drag jobs from one date column to another to reschedule or reorganise the workflow.

Visual Status Indicators – Colours and icons provide a quick view of job progress, delays, or completion status.

- **Calendar Option**

The **Calendar View** displays jobs in a familiar calendar layout, making it easy to see when work is scheduled across specific days.

Key Features:

Jobs are displayed on the calendar by their selected date (e.g., Start Date), so you can quickly see what is planned and when.

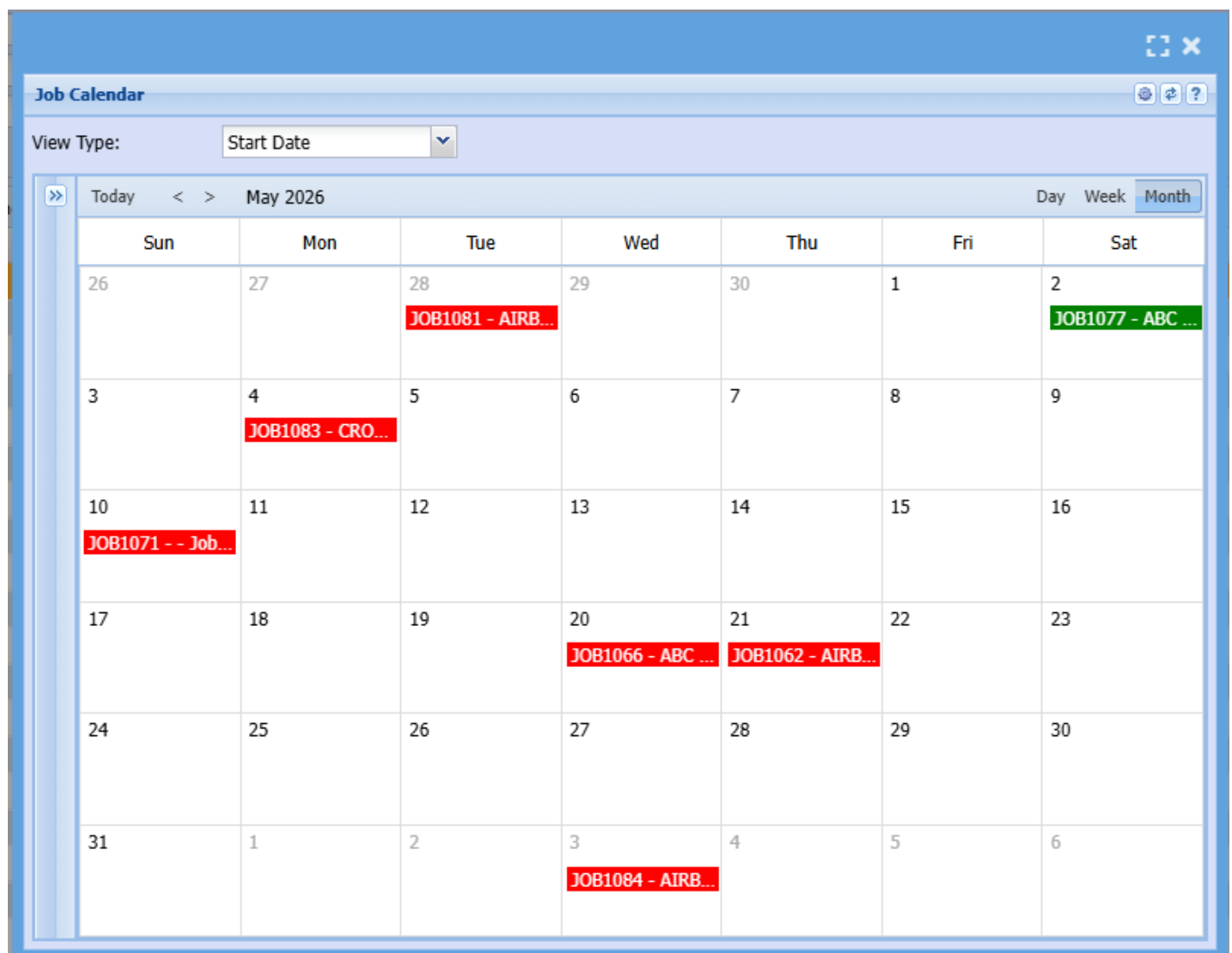
View Options – You can switch between:

- **Day** – View jobs scheduled for a single day
- **Week** – See jobs across a full week
- **Month** – Get an overview of jobs across the entire month

Navigation – Use the arrows or date selector to move between different days, weeks, or months.

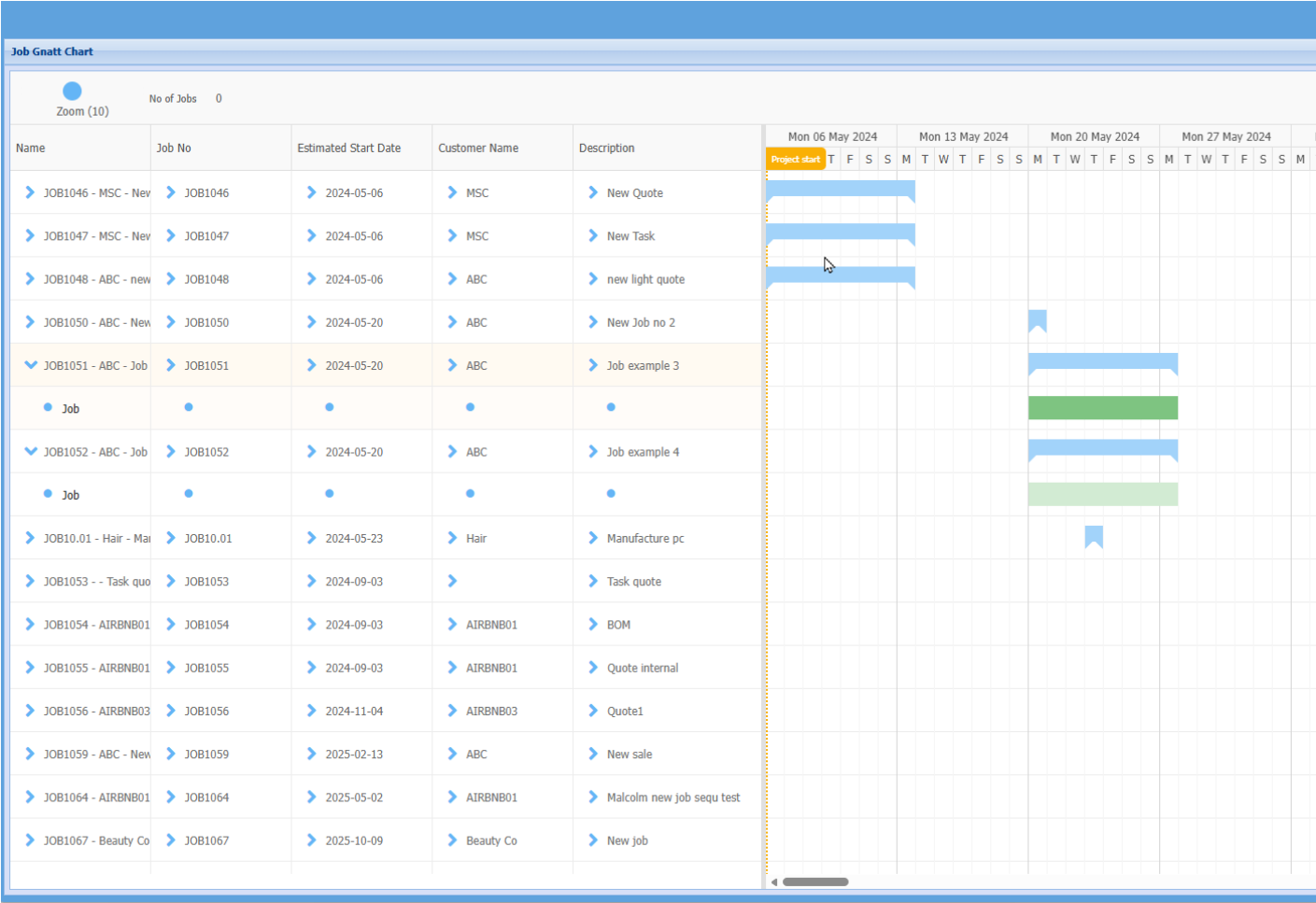
Drag-and-Drop Functionality – Jobs can be easily dragged from one date to another to reschedule them.

Visual Indicators – Jobs are shown as coloured blocks, helping you quickly identify and differentiate between them.



- **Gantt Chart View**

The **Gantt Chart View** provides a detailed timeline of all jobs, allowing users to visually track progress, duration, and scheduling across a timeline.



- **Timeline Display** – Each job is represented as a horizontal bar stretched across the dates it is scheduled for, making it easy to see how long a job will take and when it is due.

- **Job Details Panel** – On the left-hand side, key information is displayed in columns, including:

- Job Name
- Job Number
- Estimated Start Date
- Customer Name
- Description

- **Date Grid (Right Side)** – The timeline on the right shows days and weeks, with job bars positioned according to their scheduled start and end dates.

- **Visual Progress Tracking** – The length and position of each bar clearly indicate:

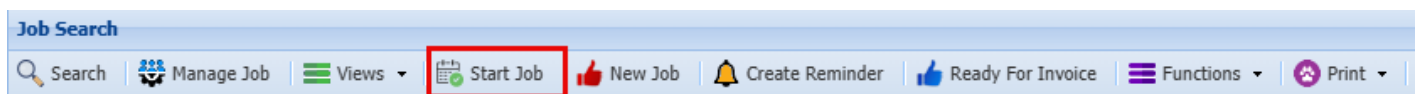
- Job duration
- Overlaps with other jobs
- Gaps in scheduling

- **Drag-and-Drop Functionality** – Jobs can be moved along the timeline to adjust scheduling, allowing users to easily reschedule or reorganise workloads.

- **Zoom Option** – The zoom control allows users to adjust how much detail is displayed in the timeline (e.g., viewing a shorter or longer time period).

Start Job Button

The **Start Job** button allows you to manually start a job.



- In most cases, a job will **start automatically** as soon as a job line is managed or worked on.
- However, there may be situations where you want to **start the job before managing any lines**.

In this case, you can simply:

1. Select the job from the list
2. Click the **Start Job** button

This will activate the job without needing to work on any job lines first.

New Job Button

The **New Job** button is used to create a job directly, without first creating or promoting a quote.



When this option is selected, a new job is started “on the fly,” allowing users to quickly set up and begin working on a job straight away.

- **Direct Job Creation** – Create a job immediately without needing an existing quote
- **Automatic Background Process** – The system will automatically create a blank quote in the background

- **Linked Records** – This quote is linked to the job and can be accessed later under the **Quotes** section
 - **Flexible Workflow** – Ideal for situations where work needs to begin quickly without following the full quote-to-job process
-

Create Reminder Button

The **Create Reminder** button allows you to set a reminder for a selected job.



To use this feature:

1. Select a job from the list
2. Click **Create Reminder**
3. Enter the reminder details (e.g., date, time, and notes)

This is useful for setting follow-ups, deadlines, or any important actions related to a job.

Ready for Invoice

The **Ready for Invoice** button is used to mark a job as ready to be invoiced.

When selected, it simply adds a **thumbs-up icon** to the job in the results grid, providing a clear visual indicator that the job is complete and ready for billing.

Job Search

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

Basic Search Custom Search Expand

Job Number: JOB1079 Short Description:
 Customer From: Customer To:
 Quote Number: Order No:
 Date Type: Start Date Job Status: All
 Date From: 2024-04-05 Date To: 2026-06-09

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

#	Att	Memo	Due	Job Status	Team	Info	WIP O/S	% Completed	Completion Date	Delivery Date	Start Date	App
1				Ready For Invoice			1	100%	2026-04-07	2026-04-14	2026-04-08	202

- **Visual Indicator** – Adds a thumbs-up icon to the job line
- **Quick Status Update** – Clearly shows that the job is ready to be invoiced
- **No Complex Process** – This is a simple flag and does not generate an invoice automatically
- **Easy Tracking** – Helps users quickly identify which jobs are ready for the invoicing stage

Functions Button

The **Functions** tab provides access to a range of additional actions that can be performed on a selected job. These are typically used for maintenance, updates, or managing specific job settings.

Job Search

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

Basic Search Custom Search Expand

Job Number: Short Description:
 Customer From: Customer To:
 Quote Number: Order No:
 Date Type: Start Date Job Status: All
 Date From: 2026-04-10 Date To: 2026-06-10

Page 1 of 1 Remove Paging: Total Budget: 30 013.47 Total

Close or Cancel Job

Job BOM

Import Delivery / Completion Dates

Recalculate Job

Update Percentage Complete

Payments & Retentions

Change Customer On Job

Close or Cancel Job	Allows you to close a completed job or cancel a job that is no longer required
Job BOM	Opens or manages the materials associated with the job
Import Delivery / Completion Dates	Used to update job delivery or completion dates in bulk
Recalculate Job	Refreshes and recalculates job costs and related figures to ensure accuracy

Update Percentage Complete	Updates the job's progress bar percentage based on current activity
Payment / Retention	Manages payment details, including any retention amounts held or released
Change Customer on Job	Allows you to update or correct the customer linked to the job

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