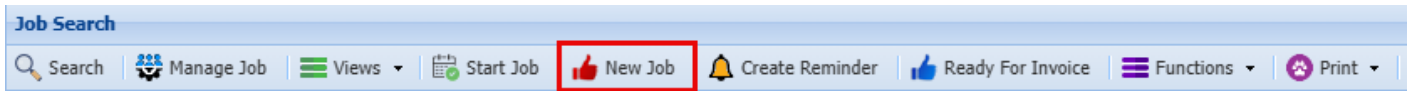


New Job Button

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

Creating a New Job Process:

- Click **New Job**
- **Complete relevant forms**

Create New Job

Customer: Customer Name:

Contact Person: Description:

Division: Reference:

Region: Sales Rep:

Invoice Group: Asset Item: L: ☐

Long Description:

Please note that this will reserve a blank quote number

Continue Cancel

Customer	Select the customer the job is for
Customer Name	Displays the name of the selected custome
Contact Person	Choose the relevant contact for the job
Description	Enter a short description or title for the job
Division	Assign the job to a specific business division
Reference	Add a reference number if applicable (e.g., customer reference)
Region	Select the region or branch responsible for the job
Sales Rep	Assign the job to a sales representative
Invoice Group	Specify how the job will be grouped for invoicing
Asset Item	Link the job to a specific asset if required
Long Description	Enter a more detailed description of the job

Once you have added your information, select how you would like to proceed.

- **Continue** – Proceeds to the next step and creates the job
- **Cancel** – Exits without saving

This screen appears after clicking **Continue** when creating a new job. It is used to **finalise and approve the job setup**, converting the automatically created quote into an active job.

Approve Quote To Job

Quote - Approval

Job Details

BOM Create

Quote Number: 501727501862

Quote Date: 2026-06-09

Customer: ACE Traders

Branch: Web

Description: Roof Installation

Order Number:

Long Description:

Team: Team Two

Employee: All

Department: All

Function: All

Est Start Date: 2026-06-09 Hrs: 1

Group Activity: MD - Measure | Downpipes

Completion Date: 2026-06-09

Delivery Date: 2026-06-16

Create PO Drop Ship:

Allow To Exceed Quote Value:

Allow To Exceed Budget Qty:

Activate Report Dates:

Use Build Task Defaults:

Charge Up (SC):

Prepriced (CTC):

Warehouse: MAST - Master Warehouse

Job Link:

Assembly:

Lock Employee:

Continue

Close

Service Card

Job Details Section

This screen displays and confirms the key information for the job:

- **Quote Number / Quote Date** – Auto-generated by the system when the job was created
- **Customer** – The customer linked to the job which is Auto populated
- **Branch** – The branch the job is assigned to
- **Description / Long Description** – The job description entered earlier
- **Order Number (Compulsory Field)** – The **Order Number** must be entered before proceeding. The system will not allow you to continue or complete the job setup until this field has been filled in.

Job Setup Options

These fields allow you to define how the job will be managed:

- **Team** – Assigns the job to a specific team

- **Employee / Department / Function** – Further allocation of responsibility
- **Estimated Start Date & Hours** – Defines when the job will begin and initial time allocation
- **Group Activity** – Assigns the job to a specific workflow or activity group
- **Completion Date** – Expected job completion
- **Delivery Date** – When the job is due for delivery

Additional Settings (Tick Boxes)

These options control how the job behaves:

- **Allow to Exceed Quote Value** – Permits costs to go over the quoted amount
- **Allow to Exceed Budget Qty** – Allows quantities to exceed planned amounts
- **Activate Report Dates** – Enables tracking of reporting dates
- **Use Build Task Defaults** – Applies predefined task templates
- **Charge Up (SC)** – Enables charge-up costing
- **Prepriced (CTC)** – Indicates the job uses predefined pricing
- **Assembly / Lock Employee** – Controls job structure and assignment restrictions

Other Fields

- **Warehouse** – Select the warehouse linked to the job
- **Job Link** – Links this job to another job if required
- **Create PO Drop Ship** – Option to create purchase orders for direct delivery

Action Buttons

- **Continue** – Confirms and completes the job creation
- **Close** – Exits without proceeding

Revision #1

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