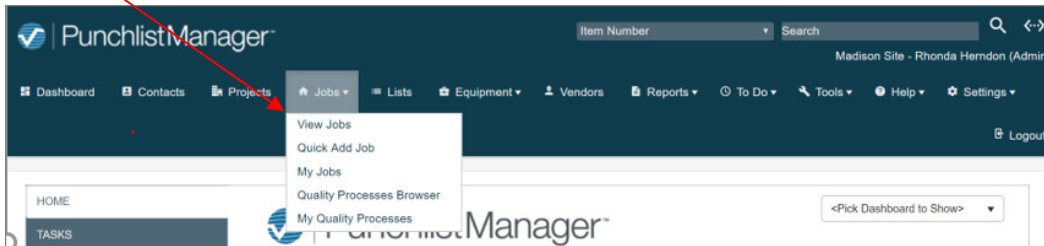


HOW to ADD NEW JOBS

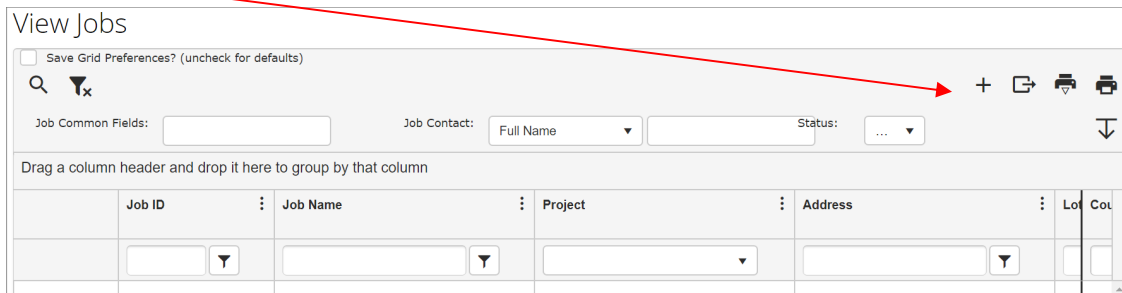
OPTION 1

Select Jobs from the top toolbar then select View Jobs.

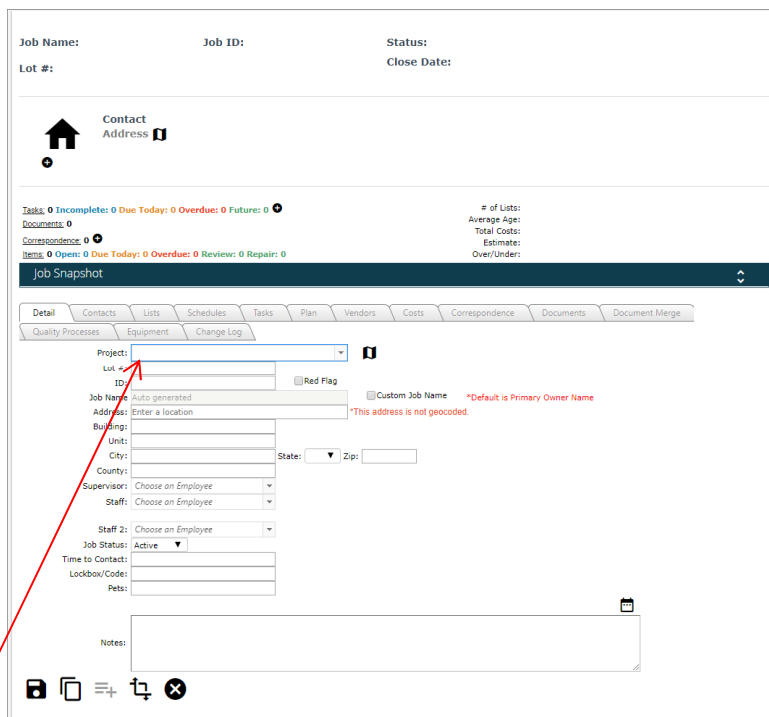
Jobs > View Jobs



- Select the + icon.



Job Detail Screen

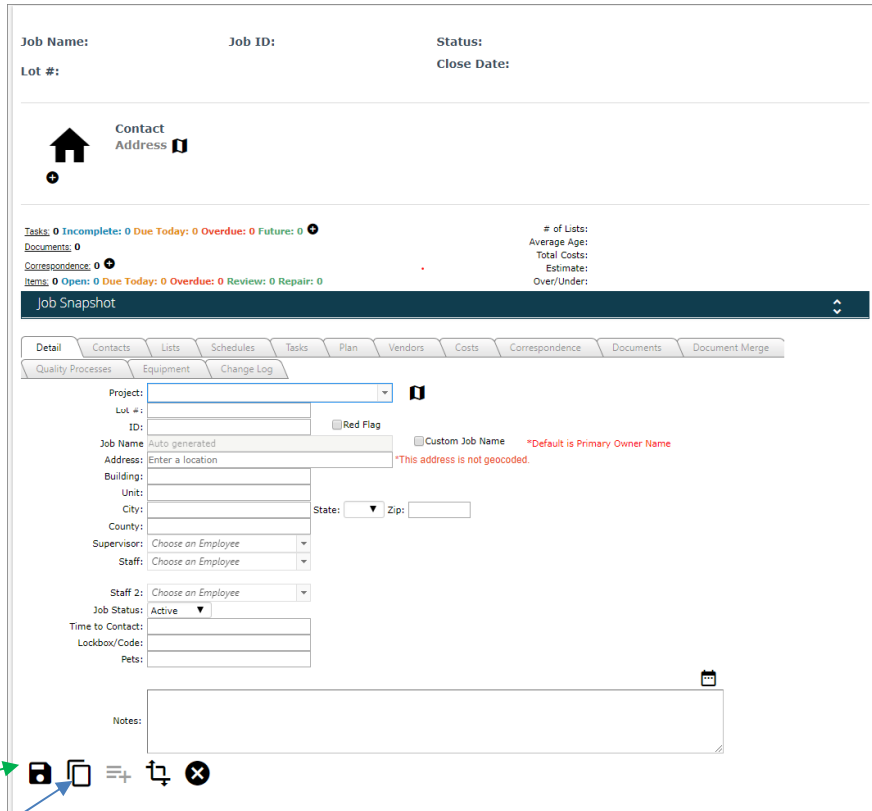


- Select the Project from the drop-down menu. Various fields will self-populate based on the detailed information previously entered in the Project detail.

HOW to ADD NEW JOBS

ADD the DETAILS

- **Lot#** - entering this field is then searchable
- **Address**- entering this field is then searchable. This is the physical street number and address for the home. *NOTE if this is a multifamily Project you will be able to add the address to the Project Detail Tab and it will auto-populate into each job record that is added for the Project.
- **Building & Unit**- this field is mostly used for *multifamily properties* where there are multiple units and buildings or floors in buildings.

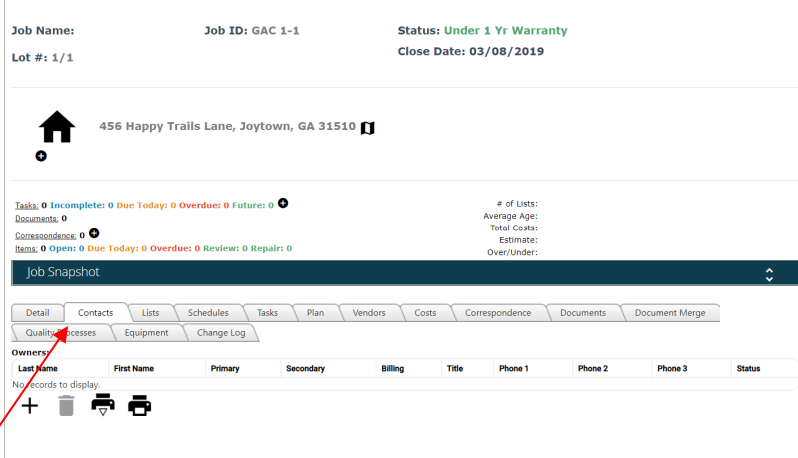


'SAVE' VS. 'SAVE & ADD COPY'

- Use the **SAVE** icon when you entered all the detail information.
- Use the **SAVE & ADD COPY** icon when you want to only change 1 or 2 fields in the subsequent records that are being added. For example, in a **multifamily property** the unit and building number can be changed and everything else can be saved and copied to the next record you are adding.

HOW to ADD NEW JOBS

ADD Contact Information: The Primary and Secondary Contact and their information are added here.



Job Name: Job ID: GAC 1-1 Status: Under 1 Yr Warranty
 Lot #: 1/1 Close Date: 03/08/2019

456 Happy Trails Lane, Joytown, GA 31510

Tasks: 0 Incomplete: 0 Due Today: 0 Overdue: 0 Future: 0
 Documents: 0
 Correspondence: 0
 Items: 0 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0

of Lists: Average Age: Total Costs: Estimate: Over/Under:

Job Snapshot

Detail Contacts Lists Schedules Tasks Plan Vendors Costs Correspondence Documents Document Merge
 Quality Processes Equipment Change Log

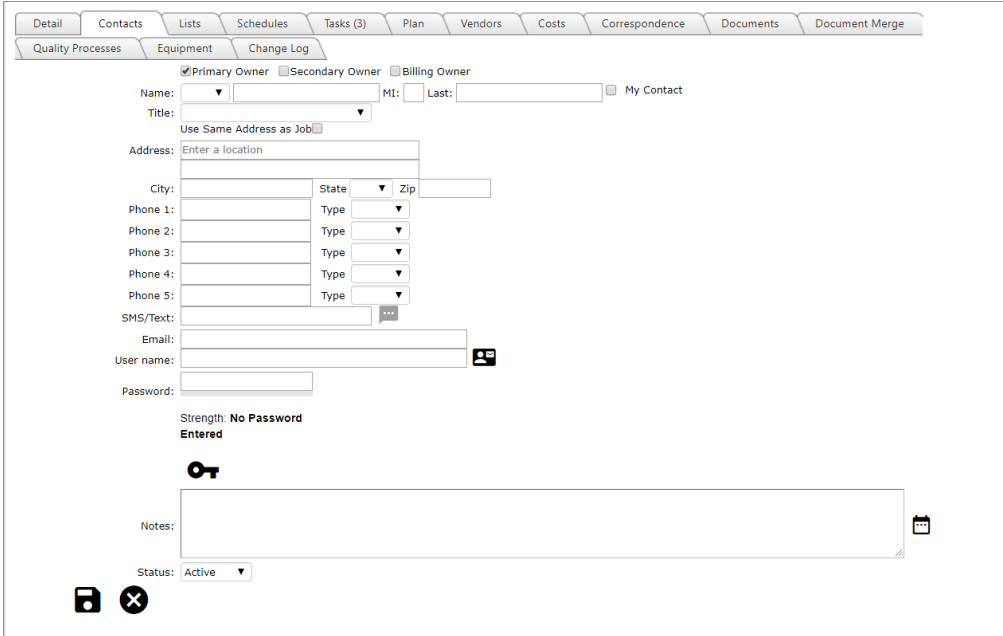
Owners

Last Name	First Name	Primary	Secondary	Billing	Title	Phone 1	Phone 2	Phone 3	Status
No records to display.									

+ [Trash] [Print] [Printer]

- Select the Contacts Tab, select the + icon

Contact Tab View



Detail Contacts Lists Schedules Tasks (3) Plan Vendors Costs Correspondence Documents Document Merge
 Quality Processes Equipment Change Log

Primary Owner Secondary Owner Billing Owner

Name: [Dropdown] [Text] MI: [Text] Last: [Text] My Contact

Title: [Text] Use Same Address as Job

Address: Enter a location [Text]

City: [Text] State: [Dropdown] Zip: [Text]

Phone 1: [Text] Type: [Dropdown]
 Phone 2: [Text] Type: [Dropdown]
 Phone 3: [Text] Type: [Dropdown]
 Phone 4: [Text] Type: [Dropdown]
 Phone 5: [Text] Type: [Dropdown]

SMS/Text: [Text] [More]
 Email: [Text]
 User name: [Text] [Icon]
 Password: [Text]


Strength: No Password Entered

OT

Notes: [Text Area] [Calendar Icon]

Status: Active [Dropdown]

[Save] [Cancel]

- Select Contact Type, First and Last Name, Title, add checkmark to 'Use Same Address as Job for Address (NOTE: if different from Job address the address can be manually entered), Phone Number and type, email address, Job Portal username and password, and Notes (the Notes field does not print and is not viewable except on this screen).
- SAVE by selecting the  icon.

NOTE: A Primary Owner is required. The following popup error message will appear if the Primary is not entered first.



HOW to ADD NEW JOBS

Additional contacts

- If there is a secondary contact repeat the above steps making sure to check mark the box for secondary.

ADD Warranty Dates: Dates are an important field and are required for PLM to function properly. Entering the CLOSE DATE will auto populate the warranty expiration dates for each Job (Note: this will only occur if the Administrative Setup has been completed).

Select JOB SNAPSHOT

Job Name: Klem Kiddlehopper Job ID: GAC 1-1 Status: Under 1 Yr Warranty
 Lot #: 1/1 Close Date:



 **Klem Kiddlehopper** 555-555-5555 - Home klemk@skelton.com
 456 Happy Trails Lane, Joytown, GA 31510 



Tasks: 3 Incomplete: 3 Due Today: 0 Overdue: 0 Future: 3  # of Lists:
 Documents: 0 Average Age:
 Correspondence: 0  Total Costs:
 Items: 0 Open: 0 Due Today: 0 Overdue: 0 Review: 0 Repair: 0 Estimate:
 Over/Under:



Job Snapshot 



WARRANTY DATES VIEW



1 Yr Warranty Dates



Start Date:  



Contract Date:  



Pre-Close Date:  


Sold Date:  

Close Date:  

1 Yr Wty Expires:  

Warranty Structure:  

Warranty Mechanical:  

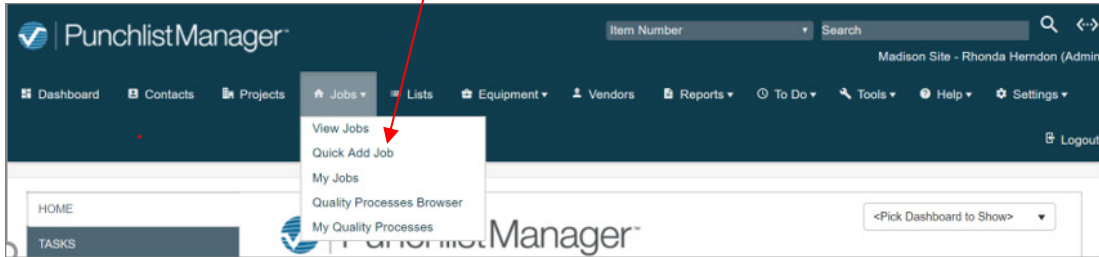


- **CLOSE DATE** – adding will auto populate the Warranty Expires, Warranty Structure and Warranty Mechanical Dates. NOTE: Structure and Mechanical Dates are dependent on Site Setup>Reporting Setup by your Administrator.
- Start Date, Contract Date, Pre-Close Date, and Sold Date can be entered here for historical reference (optional).
- SAVE- Pop up will appear confirming the Warranty Dates have been saved.

HOW to ADD NEW JOBS

OPTION 2 (NOTE: Typically not used since there is no way to enter the Warranty Dates from this screen and MUST be entered from the Job Detail).

NAVIGATION BAR>JOBS>QUICK ADD JOB



QUICK ADD SCREEN

Project: Required

Lot #:

ID:

Job Name: Custom Job Name
*Default is Primary Owner Name

Address:

Building:

Unit:

City: State: Zip:

Primary: First: Last: Billing Owner
 Title: Use Different Address
 Phone:

Email:

Secondary: First: Last: Billing Contact
 Title: Use Different Address
 Phone:

Email:

Supervisor:

Staff:

Staff 2:

Enter Data:

- Project - from the drop-down menu
- Lot/Block
- Address
- Primary and Secondary Contact information including phone numbers and email addresses
- Assign Supervisor, Staff, or Tech *If it didn't auto populate from your Project.
- SAVE or SAVE and ADD LIST (Note: if Save is selected you will be taken to the Job Detail screen. If Save & Add List is selected you will be taken to the List Detail screen)

*Note: The notes field is populated from [Settings>Site Setup>Settings](#)-Text box at the bottom of screen labeled QUICK ADD JOB TEXT - Can be used to give directions or reminders.