

Frustrated with your current software?

Tired of systems that just don't work?

Spending too much time chasing your tail?



Software That Works for YOU

EZiBusiness

Customer Centered Business Management Software

www.ezidata.com.au

Table of Contents

Jobs	3
About Jobs and Stages:.....	3
The Jobs List Screen:.....	3
<i>Opening the Details Screen</i>	3
<i>Filtering Records</i>	4
<i>Searching for Records</i>	4
The Job Details Screen:	5
<i>Setting Option Lists</i>	5
<i>Setting the Due Date</i>	5
<i>The Stages Tab</i>	6
<i>The Quotes, Orders and Invoices Tabs</i>	6
<i>The Payment Tab</i>	7
<i>The Purchases Tab</i>	7
<i>The Documents Tab</i>	8
<i>The Document Details Screen</i>	8
<i>The Custom Fields Tab</i>	9
Job Options:.....	9
Data Diagram:.....	10

Jobs

EziBusiness lets you manage the Jobs you complete for your Customers so that you are better able to provide exceptional customer service, while at the same time improving the efficiency and effectiveness of your job management processes.

The *Jobs* component contains two primary screens, the Jobs List screen and the Job Details screen. Access to the Jobs List screen is gained by **clicking** the JOBS button on the Main Menu, followed by the JOBS LIST option.

About Jobs and Stages:

The *Jobs Component* can be used to manage either single-stage Jobs, such as a service call to a Customer's site, or multi-stage Jobs.

Stages represent a sub-task of the main Job. For example, building a house requires numerous stages, such as Foundations, Framing, Plumbing and Carpentry.

Sales and purchasing information can be recorded against both Jobs and Stages, depending on your requirements. It is important to note that any sales and purchasing information recorded against a Stage will also be displayed in the parent Job details screen.

The Jobs List Screen:

The *Jobs List* screen provides a snap-shot of information about Jobs required to be completed for your Customers. The screen contains Header, Detail and Footer sections.

Filters available in the Header section include a Customer Name Search, Status filter and an Employee Filter. You can use any combination of Filters to refine your search process.

Opening the Details Screen

The screenshot shows the 'Job List' window with the following data:

Job No	Date Due	Customer Name	Description	Status	Assigned To	Type	Time Due
<u>J0000016</u>	10/01/2007	Business Name 1	Job 1 Description	Active	John Smith	Contract	ASAP
J0000017	20/10/2007	Business Name 1	Job 4 Description	Active	Fred Jones	Contract	Not Defined
J0000020	31/10/2007	Business Name 4	Job 5 Description	Active	John Smith	Maintenan...	Not Defined

Filters: Customer Name, Status, Employee, Type, Time Due, Custom Field Search (Field, Value).
Date Range: Between 8/04/2007 and 8/05/2008. Buttons: Print, New, Close.

Double mouse click on an underlined Job No to open the Job Details screen (see The Job Details Screen:

Filtering Records

The screenshot shows the 'Job List' application window. At the top, there are several filter fields: 'Customer Name', 'Status', 'Employee', 'Type', and 'Time Due'. The 'Employee' dropdown menu is open, showing a list of names: 'All', 'Not Defined', 'John Smith', 'Fred Jones', and 'Frank Jones'. The 'Status' dropdown is set to 'All'. Below the filters is a table with columns: Job No., Date Due, Customer Name, Description, Status, Assigned To, Type, and Time Due. The table contains three rows of job records. At the bottom, there is a date range filter 'Between' with dates '8/04/2007' and '8/05/2008', and buttons for 'Print', 'New', and 'Close'.

Job No.	Date Due	Customer Name	Description	Status	Assigned To	Type	Time Due
J0000016	10/10/2007	Business Name.1	Job 1 Description	Active	John Smith	Contract	ASAP
J0000019	20/10/2007	Business Name.1	Job 4 Description	Active	Fred Jones	Contract	Not Defined
J0000020	31/10/2007	Business Name.4	Job 5 Description	Active	John Smith	Maintenan...	Not Defined

By selecting an option from the **Status Filter** or **Employee Filter**, you can filter the list to show only those records that match your selection.

By default, this screen filters Jobs using the date range indicated in the Footer. **Mouse click** on one of the dates to open the calendar to select the date range.

Searching for Records

The screenshot shows the 'Job List' application window. The 'Customer Name' field is highlighted with a red circle and contains the text 'Business Name'. The 'Status' and 'Employee' dropdowns are also highlighted with a red circle. The table below shows the same three job records as in the previous screenshot. The date range filter at the bottom is 'Between' with dates '8/04/2007' and '8/05/2008', and buttons for 'Print', 'New', and 'Close'.

Job No.	Date Due	Customer Name	Description	Status	Assigned To	Type	Time Due
J0000016	10/10/2007	Business Name.1	Job 1 Description	Active	John Smith	Contract	ASAP
J0000019	20/10/2007	Business Name.1	Job 4 Description	Active	Fred Jones	Contract	Not Defin...
J0000020	31/10/2007	Business Name.4	Job 5 Description	Active	John Smith	Maintenance	Not Defin...

Simply type in the text you want to search for into the **Customer Name Search** and EziBusiness filters the records to find any that match

The more text you type, the narrower your search becomes.

Delete the text to remove the search and view all records.

The Job Details Screen:

The *Job Details* screen contains information pertaining to a Job assigned to a specific Customer. The screen contains data such as Status, Date Due the Task Description and the employee assigned the Job.

Setting Option Lists

The screenshot shows the 'Job Details' window with the following fields and values:

- Job No.: J0000016
- Customer Details:
 - Select Customer: Business Name 1
 - Select Address: Postal Address
 - Address: Street Number 1
 - Suburb: Suburb
 - Postcode: Postcode
 - Phone1: 00 2222 1111
 - Phone2: 00 2222 3333
 - Contact: Kathy Brown
 - State: State
- Job Details:
 - Type: Contract (circled in red)
 - Payment: Credit Card (circled in red)
 - Assigned To: John Smith
 - Date Created: 6/06/2007
 - Date Due: 10/10/2007
 - Time Due: ASAP
 - Description: Job 1 Description
 - Status: Active
 - Completed:

Buttons at the bottom: Print, Delete, New, Save, Close.

The list of available options for fields, such as the **Type** field, can be altered using the related tab in the Settings screen.

Setting the Due Date

The screenshot shows the 'Job Details' window with a calendar popup for the 'Date Due' field. The calendar is for October 2007 and shows the date 10/10/2007 selected. The 'Today' date is 8/04/2008.

The 'Job Details' section shows the following values:

- Type: Contract
- Payment: Credit Card
- Assigned To: John Smith
- Date Created: 6/06/2007
- Date Due: 10/10/2007
- Time Due: ASAP
- Description: Job 1 Description
- Status: Active
- Completed:

Buttons at the bottom: Print, Delete, New, Save, Close.

Double mouse click on the Date Created or Date Due field to open a Calendar from which to choose the required date.

The Stages Tab

Stage Name	Start Date	Date Due	Completed	Status
<u>Stage 1</u>	22/10/2007	30/10/2007		Active
<u>Stage 2</u>	5/11/2007	30/11/2007		Active
<u>Stage 3</u>	10/12/2007	28/12/2007		Active

The *Stages* Tab contains a list of *Stages* that have been created for this *Job*.

Double mouse click on an underlined *Stage Name* to open the *Job Stage* screen.

The Quotes, Orders and Invoices Tabs

Quote No.	Quote Date	Layout	Quote Total
<u>Q000006</u>	12/10/2008	Item	\$2,400.00
<u>Q000007</u>	12/10/2007	Item	\$550.00
<u>Q000001</u>	2/10/2007	Item	\$1,100.00

The *Quotes*, *Orders* and *Invoices* Tabs contain a list of *Sales* documents that have been created for this *Job*.

The document's *Invoice Type* determines which *tab* the document appears in.

Double mouse click on an underlined *Invoice Number* to open the *Customer Invoice* screen.

The Payment Tab

Payment_No	Payment_Date	PaymentType	Amount_Paid	Allocated
<u>0000001</u>	11/08/2007	Credit Card	\$410.00	\$410.00
<u>0000003</u>	2/10/2007	Credit Card	\$490.00	\$490.00
<u>0000005</u>	12/10/2007	Credit Card	\$240.00	\$240.00
<u>0000006</u>	12/10/2007	Credit Card	\$200.00	\$200.00

\$1,340.00 \$1,340.00

Print New

Print Delete New Save Close

The *Payments* Tab contains a list of *Payments* that have been made against this *Job*.

Double mouse click on an underlined *Payment Number* to open the *Customer Payment* screen.

The Purchases Tab

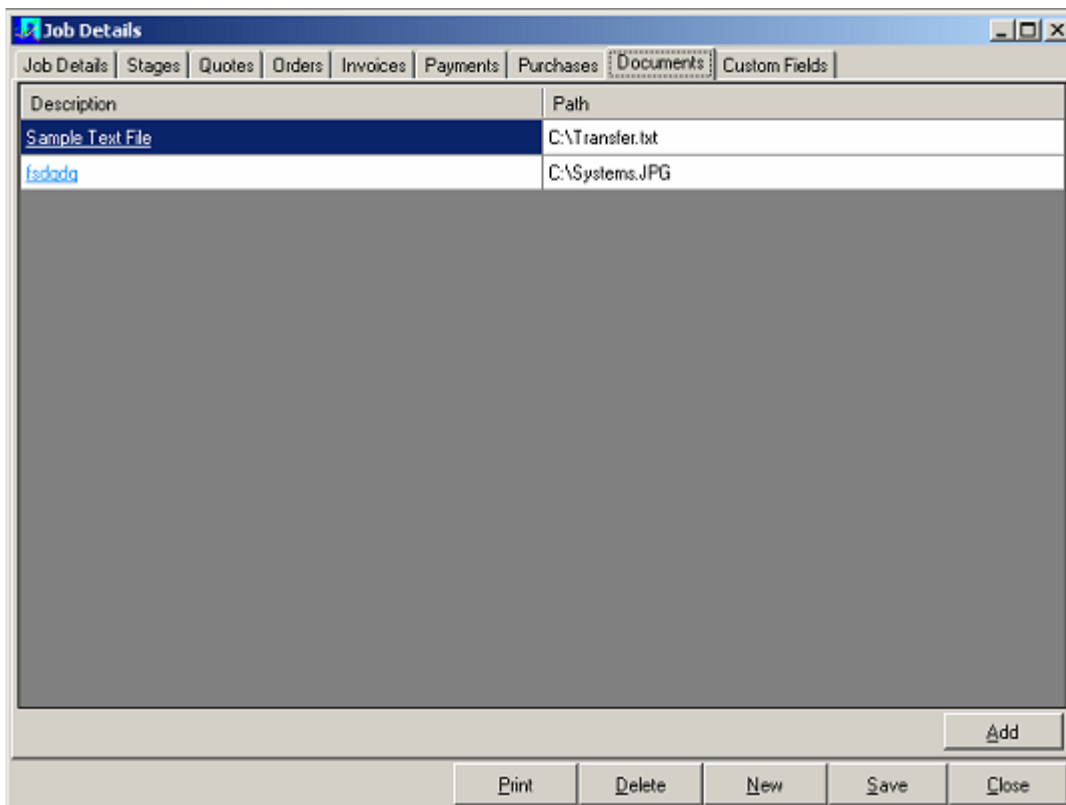
Invoice No.	Invoice Date	Layout	Invoice Total
<u>000001</u>	12/07/2007	Miscellaneous	\$500.00
<u>000001</u>	12/07/2007	Miscellaneous	\$2,200.00
<u>000003</u>	11/10/2007	Item	\$550.00
<u>000007</u>	12/10/2007	Item	\$1,200.00
<u>000002</u>	12/10/2007	Item	\$120.00

\$4,570.00 \$4,570.00

Print New

Print Delete New Save Close

The Documents Tab

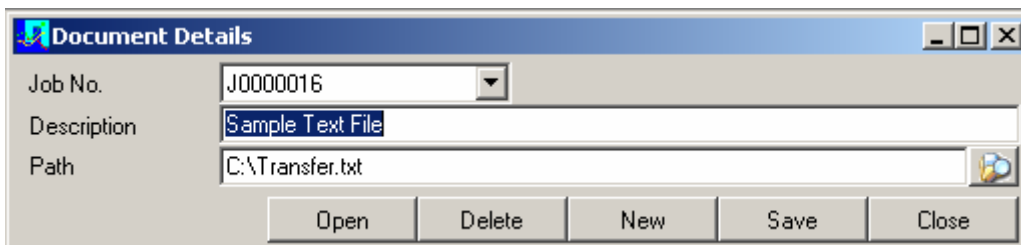


The DOCUMENTS Tab contains a list of Documents, such as be Contracts and Agreements related to this Job. A link is created to these documents so that you can quickly and easily locate these.

Click Add, to add a new document to the list.

Double mouse click on an underlined File Name to open the Document Details screen (see The Document Details Screen)

The Document Details Screen

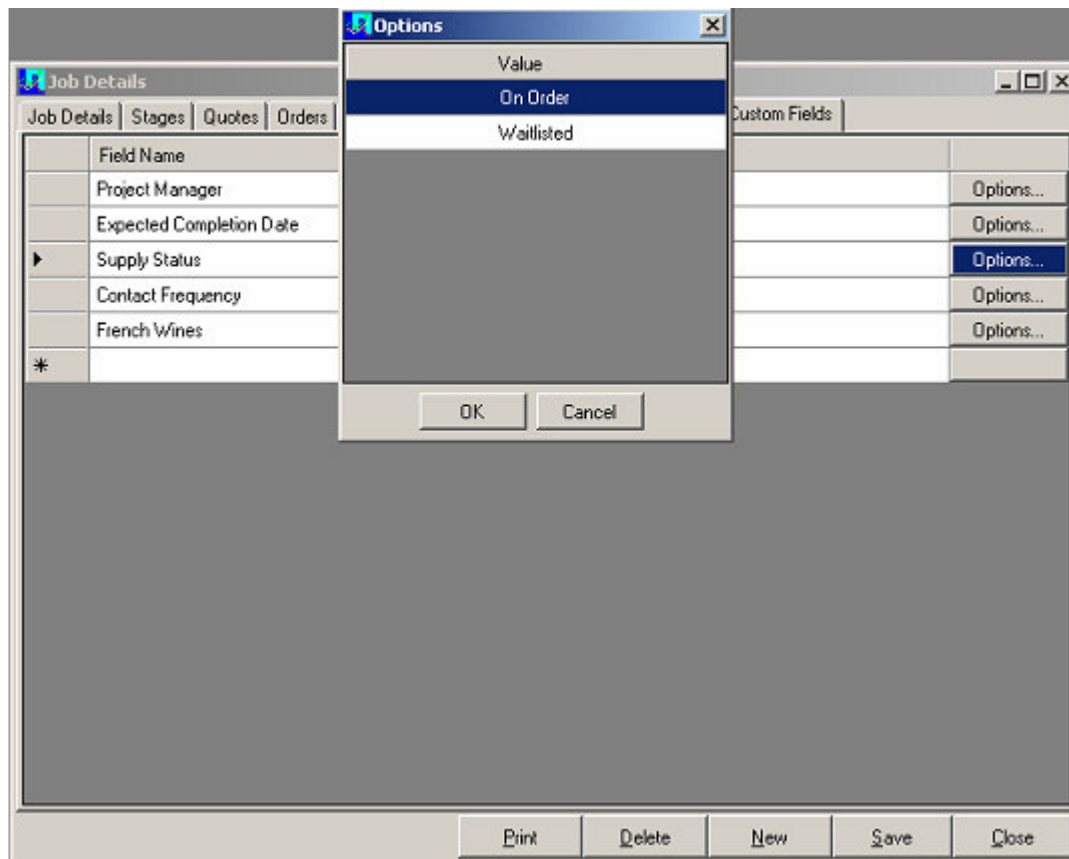


Edit, add New and Delete Documents linked to Jobs using the Document Details screen.

Click Browse to find the location of a document to link to the selected Job.

Click Open to open the selected Document in the authoring program.

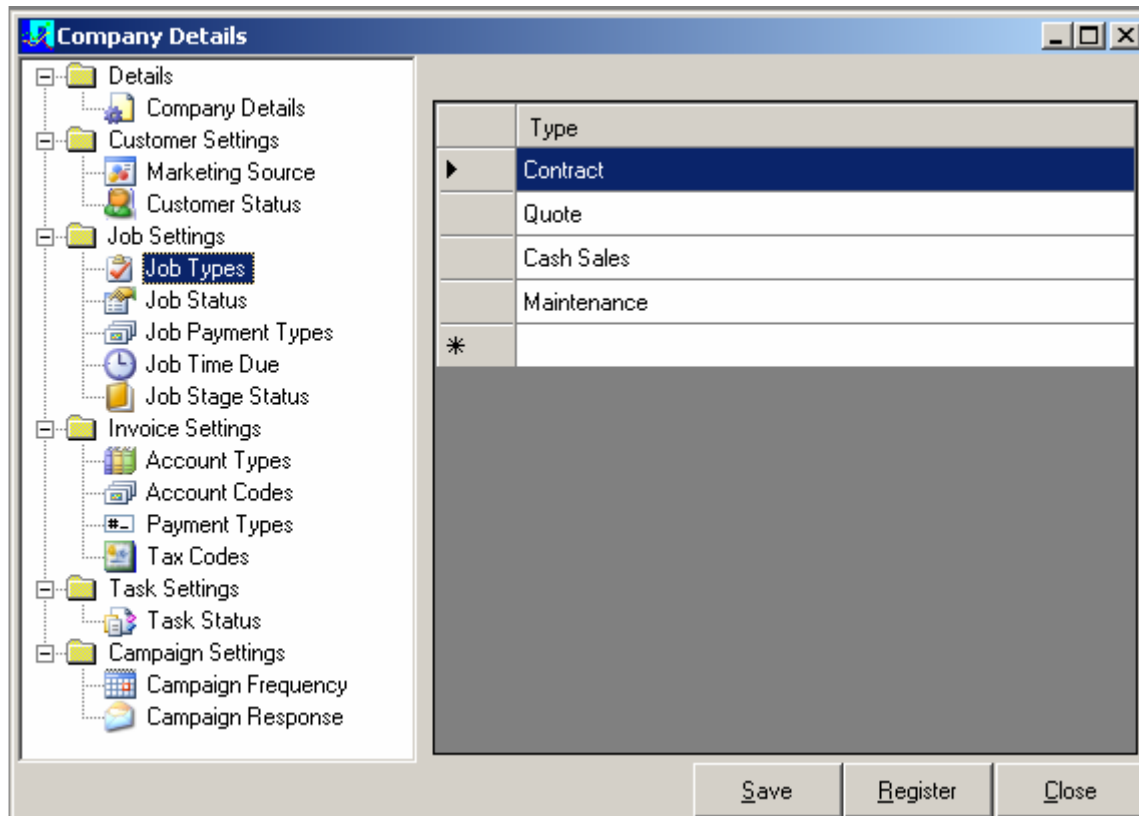
The Custom Fields Tab



Like most components in EziBusiness, the Jobs Component can be customised to suit your requirements with the use of **Custom Fields**.

Single mouse click on the *Options* button to see a list of available values for this Custom Field.

Job Options:



- **Click** the **JOB SETTINGS** item on the *Company Details* screen to view all available Option lists.
- **Click** either the **Job Types**, **Job Status**, **Job Payment Types**, **Job Time Due** or **Job Stage Status** commands to view a list of options for these fields.
- Edit any existing values, or add a new value at the bottom of the list.

Data Diagram:

