

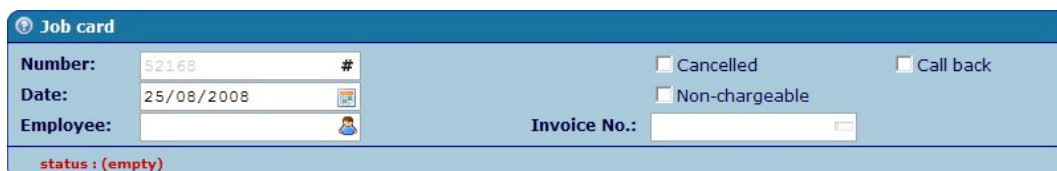
Manual Job Tracking

Version : 1.0

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- Entry screen -

The entry screen shows an empty Job card (with the new Job card number already filled in) giving you the ability to immediately search for an existing Job card by typing in a Job card number or an Invoice number. As soon as you start typing the Job card number or Invoice number, the number of the last available Job card will be shown in the background. By entering the <Tab> or <Enter> key the Job card with the found number will be opened.



Empty Job card

- Assign the Employee -

Also when starting to type the Employee name the system will automatically search for the last entered Employee name starting with the entered text. Entering the Employee name will automatically indicate that the Job card is *in progress*.

- Finalise the Job card -

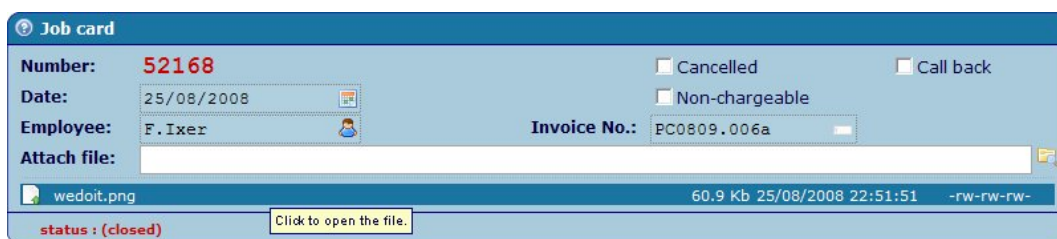
To finalise a Job card enter the Invoice number or in case the Job card is not chargeable, select the 'Non-chargeable' tickbox and eventually fill in a comment in the box which replaced the Invoice number. However, in order to finalise a Job card the Employee name needs already to be entered.

- Attaching documents -

At any stage documents can be attached to the Job card however if a Employee and Invoice is assigned to the Job card the status will change to '*closed*' and no further alterations to the Job card are possible. A list of all attached documents will be shown just below the attachment field. The system does not have limitations on the amount of documents to be added, however the maximum file size is currently set to 2Mb. When clicked on a document from the list the document will be opened.

- Cancel a Job card -

By selecting the checkbox 'Cancelled' the Job Card will immediately be *closed* and become readonly when saved.

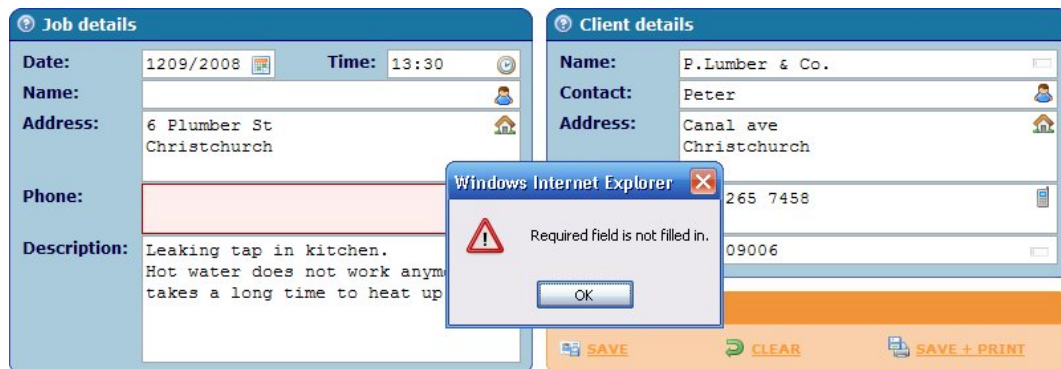


Closed Job card

- Job card details -

The Job card details has two sections, one related to the Job itself to instruct the Employee and one section with the Client details for Accounts.

The Job details do contain the actual address and contact details where the Job will take place and the Client details the contact details and address of the client who will receive the Invoice for the Job.



The screenshot shows two side-by-side forms: 'Job details' and 'Client details'. The 'Job details' form includes fields for Date (12/09/2008), Time (13:30), Name, Address (6 Plumber St, Christchurch), Phone (highlighted in red/pink), and Description (Leaking tap in kitchen. Hot water does not work anymore. takes a long time to heat up). The 'Client details' form includes fields for Name (P.Lumber & Co.), Contact (Peter), Address (Canal ave, Christchurch), Phone (265 7458), and Postcode (09006). A warning message box from 'Windows Internet Explorer' is overlaid on the forms, stating 'Required field is not filled in.' with an 'OK' button. At the bottom of the forms are buttons for 'SAVE', 'CLEAR', and 'SAVE + PRINT'.

Job card details

- Job details -

Currently two fields are mandatory, the Job details address and the Job details Phone. When trying to save a Job card without filling in these details the field will show a red/pink background and a warning message will be given.

- Client details -

When creating a new Job card typing in the Client name will automatically search for the last available Client details from the database. By entering the <Tab> or <Enter> key the found Client details (shown shaded in the background of the fields) will automatically be filled in. This prevents you typing in all client details of existing clients all the time.

- Actions -

After saving the new Job card the saved Job card will automatically be opened. The status (shown at the bottom of the top box) will change from 'empty' to 'new'. When clicking 'SAVE + PRINT' or 'PRINT' after saving the Job card, the Job card will be printed. Even if you do not really print the Job card it will still be marked as printed and the Job card status will change to '*printed*'. Clicking on the 'CLEAR' or 'NEW' link will bring you back to an empty Job card.

See the second last page for a printed Job card example.

- Job card search -

The Job Tracking system supports two different searches whereas the Quick Search is immediately available on the entry screen at the right top and the advanced search is available by clicking on the [advanced search](#) link in the quick search area.

- Job card quick search -

The quick search enables you to quickly search for text in the following fields : *Job card number, Job card invoice number, Job details name and Employee name.*



Quick search

The *Strict search* tickbox will limit the search results in such a way that the field values have to start with the entered search phrase.

- Job card advanced search -

Using the advanced search you can exactly define which fields should be searched for the entered phrase as well as in which categories/status and which flags have to be set.



Advanced search

The *Strict search* tickbox will limit the search results in such a way that the field values have to start with the entered search phrase.

- Job card search results -

If the search did find a Job card, a list of found Job cards which applied to the search criteria will be shown. When clicking on the Job card number in the list, that particular Job card will be opened. Clicking on **reset** will bring you back to the Entry screen.

Status	Number	Invoice	Name	Date	Plumber
closed	52168	PC0809.006a		25/08/2008	F.Ixer

1 record(s) found. [reset](#)

Search results



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Job Tracking system :: V1.0

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- Extended features -

This small software program can be used as a basis for heaps of extended features. For example think about the following options:

- *Generating invoices* Using the Job Tacking software as a basis it would be an ultimate solution to use the information recorded on the Job card for generating invoices. This would include scanning and extracting data from the paper Job cards returned by the Employee which is then used to generate an invoice automatically.
The invoice data can then be made available again for your Accounting software.
- *Job planning* Having available the Job details, this system could be extended by a planning feature which allows you to semi-automatically create a weekly planning for your outstanding Jobs.
This can be realised by assigning a priority to Jobs in combination of the proposed Job date.
- *Reporting* With all the information available a history reporting is easily realised. All things however depends on the information recorded in the system and what you want to report.
An example might be a report showing you an overview of Jobs per Client so that you immediately can see the revenue per client (if invoice details are recorded too).
- *Multi user access* Using a user logon system you can give certain rights to users in order to be able to manage the system better. It would for example be possible to let the Employee access the system to see their planned Jobs or to apply for certain Jobs as well. This in combination with Job planning will increase the usability of this software program enormous.

Contact use **NOW!** for more information how we can help your business becoming more profitable.

Email : jobtracking@websoftware.co.nz