

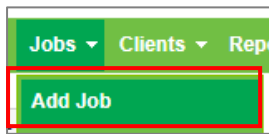
JOBS

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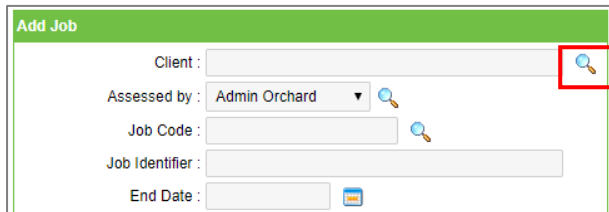
Create a Job

1. Hover on *Jobs* and click on *Add Job*:





2. Click on the spyglass icon next to the *Client* field:


NB: If the Client/Block has not previously been added, you can type the name of the Client/Block directly into this field




Add Job

Client : 

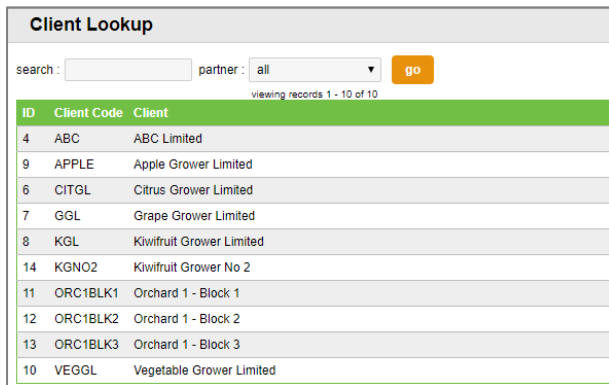
Assessed by : Admin Orchard 

Job Code : 


Job Identifier :

End Date : 

A similar screen will appear:



Client Lookup

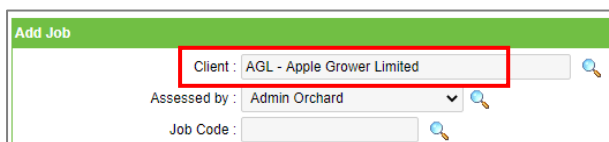
search : partner : all 

viewing records 1 - 10 of 10


ID	Client Code	Client
4	ABC	ABC Limited
9	APPLE	Apple Grower Limited
6	CITGL	Citrus Grower Limited
7	GGL	Grape Grower Limited
8	KGL	Kiwifruit Grower Limited
14	KGNO2	Kiwifruit Grower No 2
11	ORC1BLK1	Orchard 1 - Block 1
12	ORC1BLK2	Orchard 1 - Block 2
13	ORC1BLK3	Orchard 1 - Block 3
10	VEGGL	Vegetable Grower Limited


3. Select the applicable Client by clicking anywhere on its line


You will see that the *Client* field has been populated:



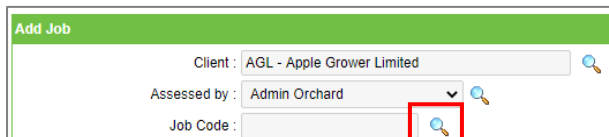
Add Job

Client : AGL - Apple Grower Limited 


Assessed by : Admin Orchard 


Job Code : 


4. Click on the spyglass icon next to the *Job Code* field:



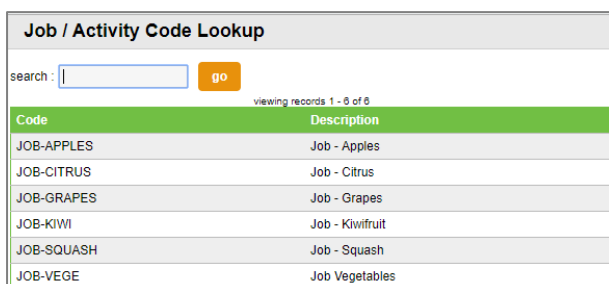
Add Job

Client : AGL - Apple Grower Limited 


Assessed by : Admin Orchard 

Job Code : 

A similar screen will appear



Job / Activity Code Lookup

search : 

viewing records 1 - 6 of 6

Code	Description
JOB-APPLES	Job - Apples
JOB-CITRUS	Job - Citrus
JOB-GRAPES	Job - Grapes
JOB-KIWI	Job - Kiwifruit
JOB-SQUASH	Job - Squash
JOB-VEGE	Job Vegetables

5. Select the applicable Job by clicking anywhere on its line

You will see that the *Job Code* field has been populated:

The screenshot shows the 'Add Job' form with the following fields: Client: AGL - Apple Grower Limited, Assessed by: Admin Orchard, and Job Code: JOB - Apples. The 'Job Code' field is highlighted with a red box.

6. Click *Add*:

The screenshot shows the 'Add Job' form with the following fields: Client: AGL - Apple Grower Limited, Assessed by: Admin Orchard, Job Code: JOB - Apples, Job Identifier: (empty), End Date: (empty), Job Type: general (selected), annual, gst, Job Status: pending, Priority: normal, Job Details: (empty), Use Chargeout Rate from Job / Activity Codes: checked, Budget Total (\$): (empty), Allocated Users Can See Budget?: unchecked. The 'add >>' button is highlighted with a red box.

A similar screen will appear:

The screenshot shows the 'Jobs' screen with a table of jobs. The table has the following columns: Job ID, Job Code, Job Identifier, Client Code, Client, Job Details, Target End Date, Date Entered, and Job Status. The first row is highlighted with a red box.

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
20	JOB - Apples		AGL	Apple Grower Limited			Jul 08 2020	pending

7. Locate the *Job* you just created and click on the *Job ID*:

NB: The Job should be at the top of the screen

The screenshot shows the 'Jobs' screen with a table of jobs. The 'Job ID' field in the first row is highlighted with a red box.


Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
20	JOB - Apples		AGL	Apple Grower Limited			Jul 08 2020	pending

8. Hover on the spyglass next to *Update Job Status*:


The screenshot shows the 'Job Details' form with the following fields: Job ID: 20, Job Type: general, Job Code: JOB - Apples, Job Client: Apple Grower Limited - contacts, Current Job Status: pending, Update Job Status: (with a spyglass icon), Work in Progress Total: \$0.00, Job Cost: \$0.00, Next Review Date: (empty), clear date, -- assign to --, save >>, Work in Progress Transfer Total: \$0.00, Total Hours Worked: 0.0000, Job Status History: +, print supplement - email supplement.

9. Change the Status from Pending to Active:


Job Details

Job ID : 20 
Job Type : general
Job Code : JOB - Apples
Job Client : [Apple Grower Limited - contacts](#)

Current Job Status : **pending**


Update Job Status :  **Change To**







Work in Progress Total : \$0.00
Job Cost : \$0.00

Next Review Date :  **clear date** -- assign to --

Work in Progress Transfer Total : \$0.00

Total Hours Worked : 0.00 [click here to change the job status to active](#)

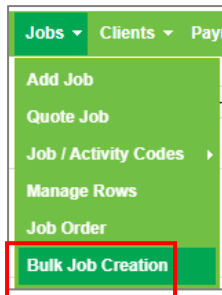
Job Status History : 

-  pending
-  cancelled
-  allocated
-  **active**
-  complete
-  invoiced

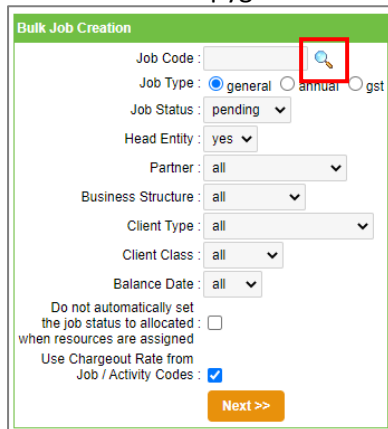
[Print](#) [email supplement](#)

Create Jobs in Bulk

1. Hover on *Jobs* and click on *Bulk Job Creation*:

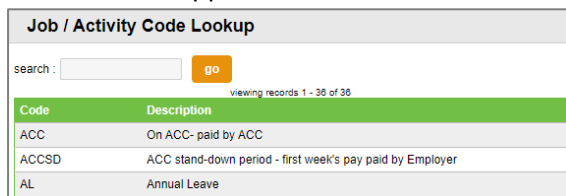


2. Click on the spyglass in the *Job Code* field:



A screenshot of the 'Bulk Job Creation' form. The 'Job Code' field has a small blue spyglass icon to its right, which is highlighted with a red square. Other fields include 'Job Type' (radio buttons for general, annual, gst), 'Job Status' (dropdown), 'Head Entity' (dropdown), 'Partner' (dropdown), 'Business Structure' (dropdown), 'Client Type' (dropdown), 'Client Class' (dropdown), and 'Balance Date' (dropdown). There are also two checkboxes: 'Do not automatically set the job status to allocated when resources are assigned' (unchecked) and 'Use Chargeout Rate from Job / Activity Codes' (checked). A 'Next >>' button is at the bottom.

3. Select the applicable *Job Code*:

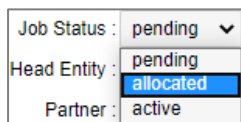


A screenshot of the 'Job / Activity Code Lookup' window. It has a search bar with a 'go' button and a table of results. The table has columns 'Code' and 'Description'. The text 'viewing records 1 - 36 of 36' is visible below the search bar.

Code	Description
ACC	On ACC- paid by ACC
ACCSD	ACC stand-down period - first week's pay paid by Employer
AL	Annual Leave

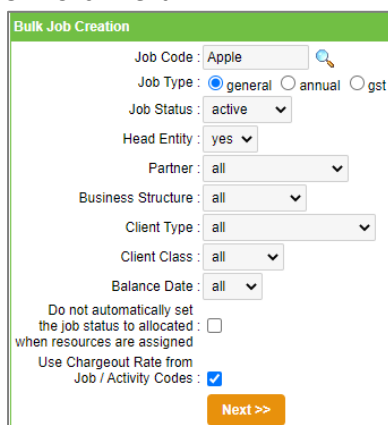
4. Select *Active* for the *Job Status*:

NB: If you want to create the Jobs but are not ready to work on all of them yet, select Pending



A screenshot of the 'Job Status' dropdown menu. The menu is open, showing options: 'pending', 'allocated', and 'active'. The 'allocated' option is highlighted with a blue background.

5. Click *Next*:

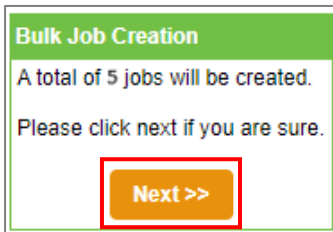


A screenshot of the 'Bulk Job Creation' form. The 'Job Code' field now contains 'Apple'. The 'Job Status' dropdown is set to 'active'. All other fields and checkboxes are the same as in the previous screenshot. The 'Next >>' button is at the bottom.

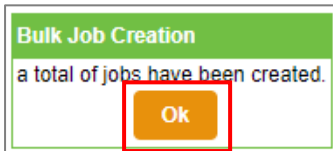
A similar screen will appear:



6. Click *Next* to create the Jobs:



7. Click *OK*:




View hours worked on a Job




1. Click on *Jobs*:



2. Locate the applicable *Job*:

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB-VINEYARD		THOM	Thompsons			Jul 13 2020	active  
20	JOB - Apples		AGL	Apple Grower Limited			Jul 08 2020	active  

3. Click the *Job ID*:

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB-VINEYARD		THOM	Thompsons			Jul 13 2020	active  
20	JOB - Apples		AGL	Apple Grower Limited			Jul 08 2020	active  

Here you will see all the hours worked on the Job:


Non Allocated resources :		name	hours worked
		Alicia White	4.0000
		Amelia Branson	10.5000
		Ben B	8.5000
		Brendon James	101.0000
		Karl Cooper	8.0000
		Lizzy Green	3.5000
		Nick Miller	4.0000
			139.5000
Total Hours Worked :		total allocated hours	total non allocated hours
		0.0000	139.5000
			total hours worked
			139.5000

View disbursements assigned to a Job





1. Click on *Jobs*:



2. Locate the applicable *Job*:

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB-VINEYARD		THOM	Thompsons			Jul 13 2020	active  
20	JOB - Apples		AGL	Apple Grower Limited			Jul 08 2020	active  

3. Click the *Job ID*:

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB-VINEYARD		THOM	Thompsons			Jul 13 2020	active  
20	JOB - Apples		AGL	Apple Grower Limited			Jul 08 2020	active  

Here you will see all the disbursements that have been assigned to the Job:

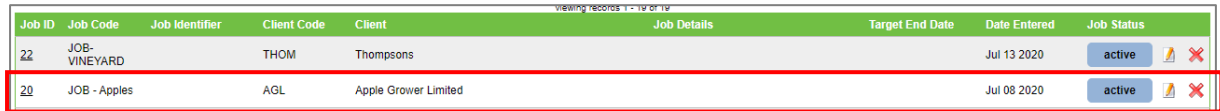
Assigned disbursements / materials :							
code	description	date	sell price	quantity	total sell price		
UTE	Ute	Jul 09 2020	12.50	1	12.50		
UTE	Ute	Jul 09 2020	12.50	1	12.50		
					25.00		

Add comments to a Job

1. Click on *Jobs*:



2. Locate the applicable *Job*:



A table with a green header and a white body. The header has columns: Job ID, Job Code, Job Identifier, Client Code, Client, Job Details, Target End Date, Date Entered, and Job Status. The second row is highlighted with a red border. The text in the second row is: 20, JOB - Apples, AGL, Apple Grower Limited, Jul 08 2020, active.

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB- VINEYARD	THOM	Thompsons				Jul 13 2020	active
20	JOB - Apples	AGL	Apple Grower Limited				Jul 08 2020	active

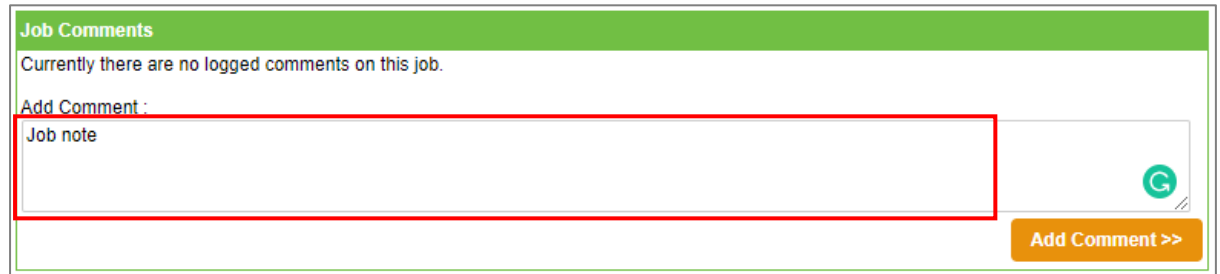
3. Click the *Job ID*:



A table with a green header and a white body. The header has columns: Job ID, Job Code, Job Identifier, Client Code, Client, Job Details, Target End Date, Date Entered, and Job Status. The first row is highlighted with a red border. The text in the first row is: 20, JOB - Apples, AGL, Apple Grower Limited, Jul 08 2020, active.

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB- VINEYARD	THOM	Thompsons				Jul 13 2020	active
20	JOB - Apples	AGL	Apple Grower Limited				Jul 08 2020	active

4. Enter the comment:



A form with a green header 'Job Comments'. Below the header, it says 'Currently there are no logged comments on this job.' There is a section 'Add Comment :' with a text input field containing 'Job note'. The input field is highlighted with a red border. To the right of the input field is a green circular icon with a white 'G'. Below the input field is an orange button with the text 'Add Comment >>'.

5. Click *Add Comment*:




A form with a green header 'Job Comments'. Below the header, it says 'Currently there are no logged comments on this job.' There is a section 'Add Comment :' with a text input field containing 'Job note'. To the right of the input field is a green circular icon with a white 'G'. Below the input field is an orange button with the text 'Add Comment >>'. The button is highlighted with a red border.

Delete comments from a Job



1. Click on *Jobs*:



2. Locate the applicable *Job*:

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB-VINEYARD	THOM	Thompsons				Jul 13 2020	active  
20	JOB - Apples	AGL	Apple Grower Limited				Jul 08 2020	active  

3. Click the *Job ID*:

Job ID	Job Code	Job Identifier	Client Code	Client	Job Details	Target End Date	Date Entered	Job Status
22	JOB-VINEYARD	THOM	Thompsons				Jul 13 2020	active  
20	JOB - Apples	AGL	Apple Grower Limited				Jul 08 2020	active  

4. Locate the comment:

Job Comments

Timesmart Limited Jul 14 2020 10:17 am 


Job note

Add Comment :

[Add Comment >>](#)

5. Click the delete icon:

Job Comments

Timesmart Limited Jul 14 2020 10:17 am 

Job note

Add Comment :

[Add Comment >>](#)

6. Click *OK*:

c3.timesmart.co.nz says

Delete, are you sure?

[OK](#) [Cancel](#)