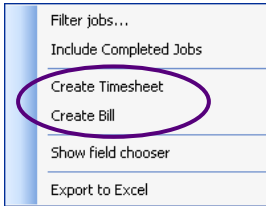


CREATE A TIMESHEET ENTRY OR BILL FOR AN ASSIGNMENT JOB

Right-click anywhere on the Job from the Homepage and select either **Create Timesheet** or **Create Bill**.



The **Timesheet** view that displays will always be the daily view.

EDIT THE COMPLETED DATE FOR A MILESTONE

When you complete a **Milestone** the completed date is automatically populated with **Today's** date. This can be overwritten by clicking in the relevant **Milestone** and accessing the drop down calendar to select the appropriate date.

Note: You must have the **Use Icons** deselected to use this feature.

MAKE A BULK REASSIGNMENT OF JOBS

You can use the right-click option on the **Assigned To** column header to **Reassign All** the jobs displayed on the screen to a certain employee or to **Remove All** assignments from a staff member.

Note: if you use the **Reassign All** or **Remove All** functions the **Assigned To** field of all the records displayed on screen will be changed. It follows that you should use **Filters** to ensure that the **Assigned To** information displayed on

screen is the information that you want to change.

When you click on the **Reassign All** option the **Find Employees** window displays. Identify the employee that you want to reassign the jobs to and click on the **OK** button to complete the reassignment.

YOUR NOTES



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MYOB JOB MANAGER

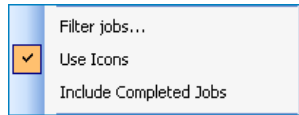
Advanced Quick Reference Guide

Job Sheet - 32 Jobs/Schedules											
Client/Assignment	Job/Sche.	Assigned To	Budget	Total/VP	Target Date	Days...	Books In	Job Start	Quetes	Review	Complete
<small>Click here to add a new job</small>											
Overdue											
Smart.Sally/Accounts	Consulting	Clae Dodds	\$3,000.00	\$0.00	21/02/2008	-6	✓				
Zelban's (Roselands) Pty. Limited/Ass...	2008	Debra Stevens	\$7,000.00	\$0.00	12/02/2008	-15					
This week			\$10,000.00	\$0.00		-21					
Abbot and Rankine Pty. Limited/Assco...	2008	Simon Bache	\$12,000.00	\$0.00	29/02/2008	2	✓				
Abbot and Rankine Pty. Limited/Assco...	2009	Clae Dodds	\$10,000.00	\$0.00	27/02/2008	0	✓				
Abbot and Rankine Pty. Limited/ASSC...	2011	Simon Bache	\$30,000.00	\$0.00	29/02/2008	2	✓				
Abbot and Rankine Pty. Limited/BAS	01.BAS	Arnold Hill	\$20,000.00	\$40.00	29/02/2008	2	✓				
Chek & Co/Accounts	2009	Arnold Hill	\$0.00	\$0.00	29/02/2008	2	✓				
Kenston Smith/Accounts	2007	Simon Bache	\$2,000.00	\$0.00	28/02/2008	1	✓				
Smart.Sally/Accounts	2009	Simon Bache	\$12,000.00	\$0.00	28/02/2008	1	✓				
Value Added Pty. Ltd./Accountancy	2006	Adam Friedman	\$4,000.00	\$1,400.00	28/02/2008	1	✓				
Zelban's (Roselands) Pty. Limited/Ass...	2009	Adam Friedman	\$0.00	\$0.00	28/02/2008	2	✓				
Next week			\$30,000.00	\$1,840.00		13					
Beyo Technicals Ltd/Accounts	2007	Daniel Samson	\$2,500.00	\$0.00	7/03/2008	9	✗				
Jones Super Fund/Audit	Audit	Malcolm Green	\$500.00	\$0.00	11/03/2008	13	✓				
Jones, Kenneth/Consulting	Consulting	Alex Berlin	\$5,000.00	\$0.00	9/03/2008	11	✓				
This Month			\$8,000.00	\$0.00		33					
Total			\$131,350.00	\$4,440.00		267					



DISPLAY OPTIONS ON YOUR HOMEPAGE

You have two display options for **Milestones** in the Homepage control and you can switch between the displays by selecting or deselecting **Use Icons** from the right-click menu.



With the **Use Icons** option ticked users will see the status of the milestone displayed as an icon.

-39	✓	⚙️
-22	✓	✓
-22	⚠️	

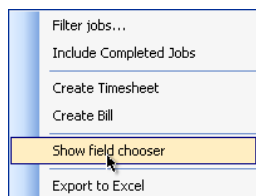
With the **Use Icons** option unticked users will see the **Milestones** displayed as dates, with a background colour to indicate status.

-39	18/02/...	25/02/20...
-22	24/02/...	24/02/20...
-22		28/04/20...

Users will see the **Due** date displayed for all **Milestones** that are not in the completed state. Once a milestone has been marked as **Complete** the due date is replaced with the **Completed** date.

CUSTOMISE YOUR HOMEPAGE

The default columns displayed can be changed by right clicking on the Homepage control and selecting the **Show field chooser** option.



Click on the **Customise homepage** option in the **Other tasks** task bar and then use the field chooser option to drag and drop fields in the display. When you are finished close the **Toolbox** and the changes will be made permanently.

HOMEPAGE GROUPING

You can drag and drop any column header from the Homepage or any field from the **Field Chooser** into your grouping as per the example below.



HOMEPAGE SORTING

You can sort data within a column by clicking on any column header to sort in ascending or descending order.

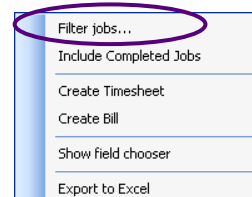
HOMEPAGE FILTERING

You can filter your homepage by clicking on the **No Filter** hyperlink or the existing filter hyperlink in the top left of your Job Manager Homepage.

[No Filter](#)

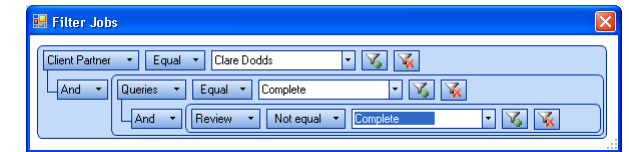
or

You can right click anywhere in the Homepage and select **Filter jobs...**



If you want to customise your Homepage to permanently include the filter then click on the **Customise homepage** option in the **Other tasks** area of the **Task Bar** first. Select the **Filter jobs...** option, as outlined above, and when you have applied filters close the **Customise homepage** option to save the customisation permanently.

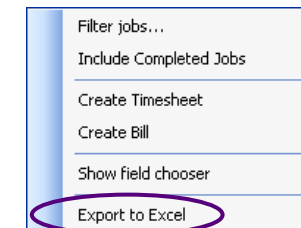
You can have several levels of filtering allowing you to create unique views for different users within the practice.



EXPORT TO EXCEL FROM YOUR HOMEPAGE

Right-click and select **Export to Excel**.

Note: You need to have deselected **Use Icons** for this option to be available.



Note: Job Manager exports exactly what displays on your Homepage, including **Notes** if you have added them to your Homepage. Milestone **Comments** will **not** export to Excel.