

## CLEAR THE STATUS OF A JOB MILESTONE

- Right-click on the appropriate **Milestone** for the job and select **Clear status**.

## ADD A DUE DATE TO A MILESTONE

Note: Due dates are only displayed when **Use Icons** is deselected via the right-click menu.

- From the Homepage click on the drop down option in the relevant **Milestone** field to display the calendar and select the due date.

## ADD A NOTE TO A JOB

Notes apply to the entire Job and the **Notes** field is available for selection from the field chooser.

- Click on the **Job Name**. The **Edit job/schedule** screen displays.
- Add or edit the notes in the **Notes** field and click on the **Finish** button to save.

Alternatively...

- From the **Field Chooser**, click and drag the **Notes** field and drop it into your Homepage.

Job Sheet - 24 Jobs/Schedules						
Client/Assignment	Job/Sched.	Assigned To	Target Date	Days Left	Notes	Job In
Click here to add a new job						
Burdall, Richard/Accountancy	2008	Allison Bowe	30/04/2008	8	This job needs...	
Anston Securities/Accounts	2008	Alex Bantin	14/03/2008	-39	All of the files are...	27/02

- Click on the **Ellipsis** button in the **Notes** field and enter or edit text in the **Notes** pop up.
- Close the **Notes** pop up to save the **Notes**.

## ADD A COMMENT TO A MILESTONE

Comments apply to each individual milestone.

- Right click on the appropriate **Milestone** for the Job and select **Insert Comment**.
- In the **Comment** pop up add or edit text.
- Press **[Esc]** or click on the **Close** button to save the notes and close the pop up.

Note: When a **Milestone** has a **Comment** attached to it a small red triangle displays in the top right hand corner of the field.

Job Sheet - 24 Jobs/Schedules							
Client/Assignment	Job/Sched.	Assigned To	Target Date	Days Left	Job In	Job Star	Client Qu.
Click here to add a new job							
Burdall, Richard/Accountancy	2008	Allison Bowe	30/04/2008	8			
Anston Securities/Accounts	2008	Alex Bantin	14/03/2008	-39	✓	✓	
Abbot and Rankine Pty Limited/Accounts	2008	Alex Bantin	07/03/2008	45	✓	✓	✗

If you hover over the **Milestone** the **Comment** displays. The pop up also displays the **Due** date or the **Completed** date and the date and name associated with the last edit.

**Job In**

Completed 27/02/2008

This needs to be advanced immediately

Last changed by Bache, Simon



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# MYOB JOB MANAGER

## General User Quick Reference Guide

Job Sheet - 32 Jobs/Schedules											
Client/Assignment	Job/Sched.	Assigned To	Target Date	Days	Total WIP	Budget	Job In	Job Star	Client Qu.	Review	Complete
Click here to add a new job											
<b>Overdue</b>	Smart, Sally/Accounts	Clare Dodds	21/02/2008	-6	\$0.00	\$3,000.00		✓			
	Zelban's (Rosslands) Pty. Limited/Acco.	Debra Stevens	12/02/2008	-15	\$0.00	\$7,000.00		✓			
					\$10,000.00						
<b>This week</b>	Abbot and Rankine Pty. Limited/Accountancy	Simon Bache	29/02/2008	2	\$0.00	\$12,000.00		✓			
	Abbot and Rankine Pty. Limited/Accountancy	Clare Dodds	27/02/2008	0	\$0.00	\$10,000.00		✓			
	Abbot and Rankine Pty. Limited/ASIC	Simon Bache	29/02/2008	2	\$0.00	\$30,000.00		✓			
	Abbot and Rankine Pty. Limited/BAS	Arnold Hill	29/02/2008	2	\$440.00	\$20,000.00		✓			
	Clark & Co/Accounts		29/02/2008	2	\$0.00	\$0.00		✓			
	Kristina Smith/Accounts	Simon Bache	28/02/2008	1	\$0.00	\$2,000.00		✓			
	Smart, Sally/Accounts	Simon Bache	28/02/2008	1	\$0.00	\$12,000.00		✓			
	Value Added Pty Ltd./Accountancy	Adam Friedman	28/02/2008	1	\$1,400.00	\$4,000.00		✓			
	Zelban's (Rosslands) Pty. Limited/Acco.		29/02/2008	2	\$0.00	\$0.00		✓			
					\$0.00	\$0.00					
					\$90,000.00	\$1,840.00					
<b>Next week</b>	Benn, Technicals Ltd/Accounts	Daniel Samson	7/03/2008	9	\$0.00	\$2,500.00		✗			
	Jones Super Fund/Audit	Malcolm Green	11/03/2008	13	\$0.00	\$500.00		✓			
	Jones, Kenneth/Consulting	Alex Bantin	9/03/2008	11	\$0.00	\$5,000.00		✓			
					\$0.00	\$8,000.00					
					\$0.00	\$0.00					
<b>This Month</b>						\$131,350.00					267
						\$4,440.00					



## ADD A NEW JOB

### Via the Homepage

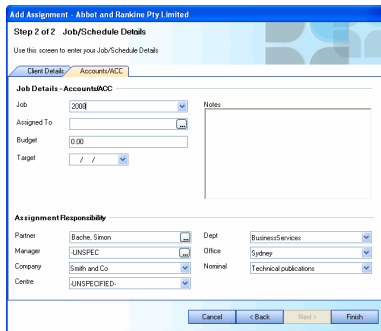
1. Click on the first line, as shown below.



2. The **Add Assignment** wizard opens.

*Note:* If the **Assignment Template** already has a **Schedule Template** you will be prompted for Schedule details rather than a Job; choose an **Assignment Template** that does not have a **Schedule Template** in order to access the **Job Details** setup.

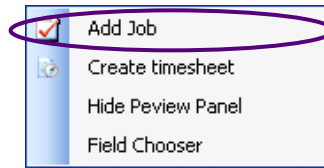
3. Select the relevant **Client**, enter a **Job Name** (or accept the default) and select an **Assignment template**.
4. Click on the **Next** button. Step 2 of the wizard displays.



5. In the **Assigned To** field select an employee, enter a number in the **Budget** field and make use of the drop down to select a **Target** date.
6. Click on the **Finish** button.

### Via the Client/Assignments Tab

1. Right click on the existing assignment and select **Add Job**.



2. Enter a **Job** name (or accept the default) and then follow steps 5 and 6 above.

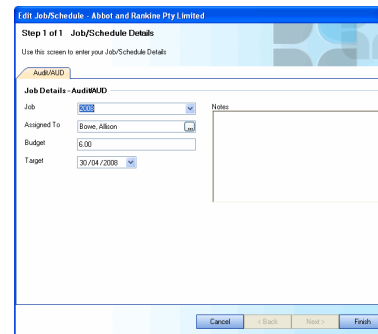
## EDIT AN EXISTING JOB

### Via the Homepage

1. Click on the hyperlink of the **Job** name.

Client/Assignment	Job/Schedule	Assigned To	Target Date
Adelson Limited/Accounts	2008	Daniel Samson	07/03/2008

The **Edit Job/Schedule** wizard displays.



2. Edit the **Job** name, **Assigned To**, **Budget** and/or **Target** date fields as appropriate.

### Via the Client/Assignments Tab

1. While in your **Client/Assignment tab** click on the existing job.

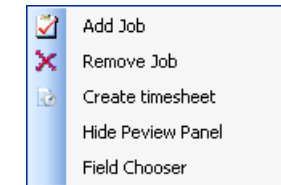
Client/Assignment	Job/Schedule	Assigned To	Target Date
Adelson Limited/Accounts	2008	Daniel Samson	07/03/2008

2. The **Edit Job/Schedule** wizard displays. Edit the **Job** name, **Assigned To**, **Budget** and/or **Target** date fields as appropriate.

## REMOVE A JOB

### Deleting an existing Job

1. While in your **Client/Assignment tab** only, right click on the job and select **Remove Job**.



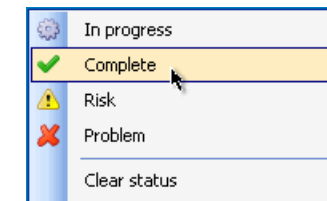
2. Click on the **Yes** button to confirm deletion.

*Note:* Once deleted, all timesheet entries will lose the link to this **Job** and revert to being linked to the **Assignment** only.

## ADD/CHANGE THE STATUS OF A JOB MILESTONE

### Via the Homepage

1. Right click on the **Milestone** for the job and select the appropriate **Status**.



### Via the Client/Assignments Tab

1. On the **Client/Assignment tab**, highlight the job and in the **Preview Panel**, right-click on the **Milestone** and select the appropriate status.

Client/Assignment	Job/Schedule	Assigned To	Target Date	Days Left	Job In
Value Added Pty Ltd./Accountancy	2008	Allison Bowe	30/04/2008		8