ADDING A NOTE TO A JOB

Notes apply to the entire job year and the Notes field is available for selection from the field chooser.

1. Include the Notes column from your field chooser into your Jobs page display and click on the note using the ellipsis button. This will pull up a note pad where you can type your job year note.

   OR

2. Click on the Job Year

   The Edit Job screen displays.

   Add or edit the notes in the **Notes** field and click on the **Finish** button to save.

ADDING A COMMENT TO A MILESTONE

Comments apply to each individual milestone.

Right click on the appropriate milestone for the Job and select Insert Comment. Use either escape or click on the close button to save.

When a milestone has a comment added to it a red triangle will appear in the top right hand corner.

If you hover over the milestone the comment will display who last changed the job and the date. Once the job is completed the completion date will display.

REMOVING A JOB SETUP BY MISTAKE

Deleting an existing Job

1. While in your Client/Job Tab

2. Right click on the job and select Remove Job

3. You will see a message asking if you are sure you wish to continue. Once deleted all timesheet entries will lose the link to this year and revert to being linked to the Job Type only.

ACCOUNTANTS OFFICE
# JOB MANAGER PAGE

Quick Reference Guide

ADDING A NEW JOB VIA THE CLIENT/JOB TAB

1. Access the Job tab on the Client page.

2. Click on the top line **Click here to add new ...,** to open the Add Job Wizard.

3. The Add Job wizard opens.

4. Select the year and tick the relevant Job Type.

5. Select Next to enter the details for the job.

6. Select the Assigned To, Budget and Target Date fields if known and select Finish. You can also modify the Job Year to include a description eg 2011TAX

Note: If the job type does not exist for this client it will be created at the same time.

Alternatively while in the Client/Job tab you can use the right mouse option to add a job to an existing job type

1. Right click on the existing job type and select Add Job.
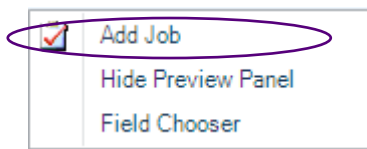
ADDING A NEW JOB VIA THE JOB PAGE

1. Click on the top line **Click here to add new ...,** to open the Add Job Wizard.

2. The Add Job wizard opens.

3. Select the client you want to add the Job to.

4. Select the year and tick the relevant Job Type.

5. Select Next to enter the details for the job.

7. Select the Assigned To, Budget and Target Date fields if known and select Finish. You can also modify the Job Year to include a description eg 2011TAX

EDITING AN EXISTING JOB

Via the Client/Job Screen

1. While in your Client/Job screen click on the existing job.

2. The Job Details screen will display where you can edit the job year (description), assigned to, budget and target date.

Via the Jobs page

1. Click on the hyperlink of the Job Name

2. The Job Details screen will display.

Note: You can edit the job year to include a description if required, but it is important to keep the year as well eg. 2011TAX
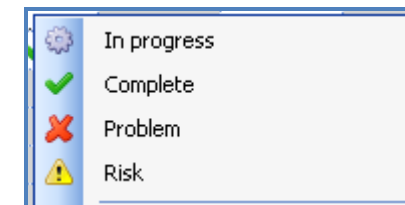
ADD/CHANGE THE STATUS OF A MILESTONE ON A JOB

Via the Job Page

Right click on the appropriate milestone for the job and select the status.

Via the Client/Job Screen

On the Client/Job page, you need to highlight the job and in the bottom Preview Panel right click on the appropriate milestone and select the status.

CLEARING THE STATUS OF A MILESTONE ON A JOB

Right click on the appropriate milestone for the job and select the Clear status option.