FOR REPORTING ON JOBS USE EXPORT TO EXCEL FROM YOUR JOB PAGE

Right click and select Export to Excel. You need to have unticked the 'Use Icons' for this option to be available.

Export to Excel

Note: The system will export out exactly the information displayed on your Job Page.

Client notes if displaying on your Job Page will also export.

Milestone comments will **not** export to Excel.

ACCOUNTANTS OFFICE JOB MANAGER - GENERAL USER

Quick Reference Guide

JOB PAGE SORTING

By Partner

The Client Partner field is available by right clicking on your Job Page, selecting the field chooser and dragging the Client Partner field into your Jobs page display

You can sort by clicking on the column header to sort by Partner surname ascending or descending.

Client Partner ▾

You can also sort on the other columns ascending or descending:
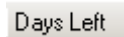
By Assigned to

Assigned To

By Target date

Target Date

By Days left
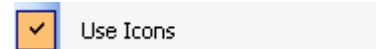
Days Left

USING DIFFERENT DISPLAYS ON YOUR JOB PAGE

You have two display options for milestones in the Job Page control and you can switch between the displays by using the right click 'Use icons' option:

☑ Use Icons

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

With the 'Use Icons' option unticked users will see the milestones displayed in different colours to indicate the status of the milestone. Once a milestone has been marked as complete the completed date will display.

JOB PAGE SHOW FIELD CHOOSER

The default columns displayed can be changed by **right clicking** on the Job Page control and choosing the '**Show field chooser**' option to drag and drop fields in the display. When you are done select the **Save Job Page** option from the task bar.

Note: The size of the actual Job Page cannot be altered.

JOB PAGE GROUPING

You can pull any column or any field from the field chooser into your grouping as per the example below.

Client Partner ▾ └── Assigned To ▲

**Note:** The fields in your grouping do not have to appear in your Job Page columns.

JOB PAGE FILTERING

You can filter your Job Page by clicking on the **No Filter** or the existing filter in the top left of your Job Page.

No Filter

If you want to change your Job Page to permanently have the filter then click on the **Save Homepage** option in the task bar.

You can have several levels of filtering.
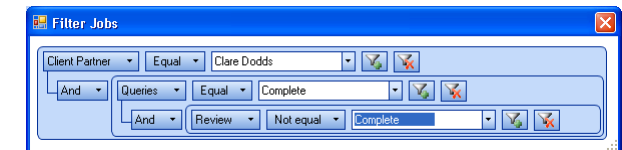
To add a filter line

To delete the filter line