

5. Job Cards:

The next phase in the workflow is where the customer's job will be scheduled and take place.

Leads 2	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent	
Surveys 12	2017-04-07 13:51:27	Payment Method Added 2 months ago									
Quotes 2	2017-04-06 12:11:23	Quote Accepted 2 months ago									
Customers 2	2017-04-16 14:25:18	Updated a month ago	148	TEST	Installation						
Job Cards	2017-04-16 22:53:49	Submitted a month ago	155	525234set	Installation						
+ New 11	2017-04-16 22:54:10	Submitted a month ago	156	525234set	Installation						
Active 121											
All Incomplete											
Completed											

Purple: This is to show you that we are currently in the job card phase of the workflow.

Blue: All leads of customer's that have been successfully created and verified will appear under the "**New**" subheading.

Green: This is a list of all the installations that now need to be scheduled and completed.

5.1. How are job cards generated?

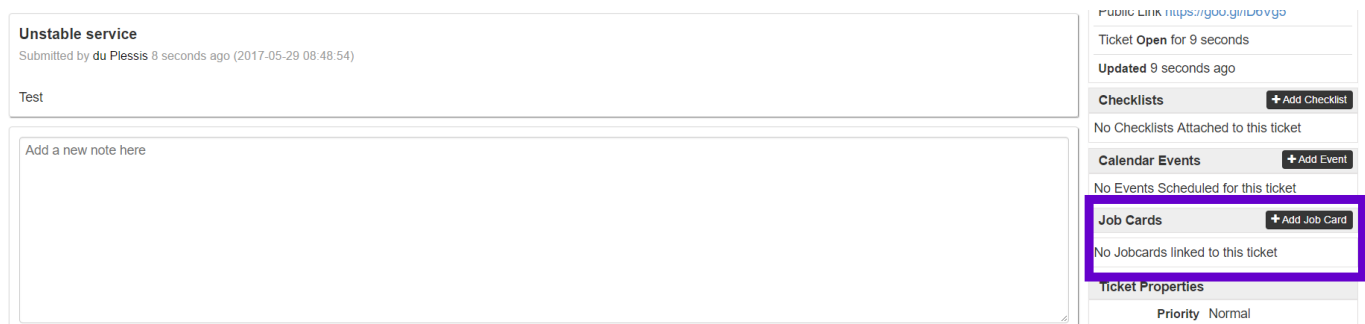
5.1.1. Sales lead process:

By following the sales lead process, is the first way in which job cards are created. After the customer has been successfully created, their billing method has been added and their recurring billing has been set up, the lead will move to the job cards new phase of the workflow. A job card will automatically be generated.

5.1.2. From tickets:

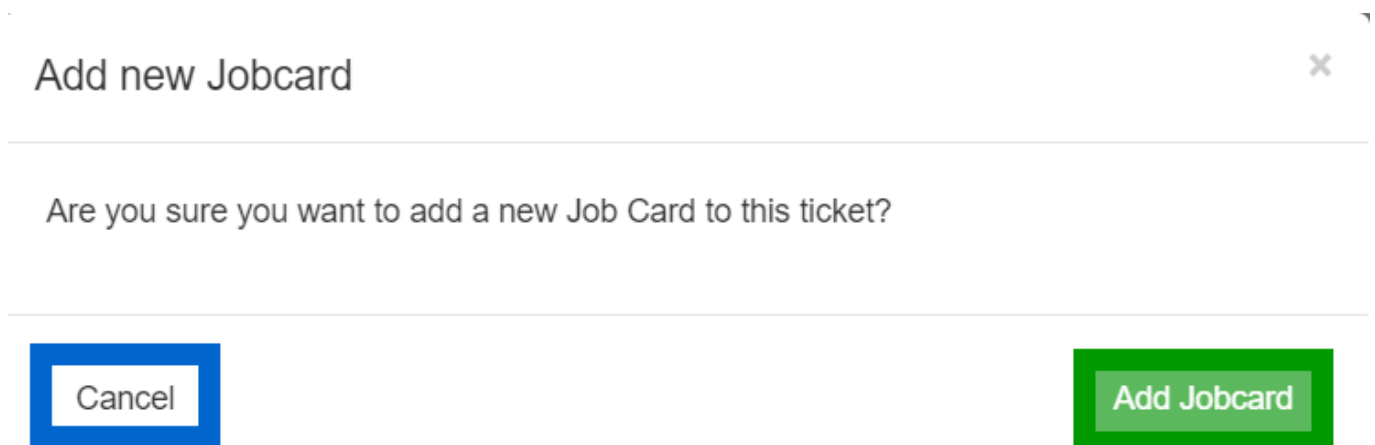
This manner will be used by helpdesk technicians who need to call out for the customer. The helpdesk technician will not be able to schedule the job itself, but once the job card has been created, it will automatically be assigned to the co-ordination department who will then schedule the job.

To create a job card from a ticket, look for the **Job Card** section on the right-hand side. Click the “**Add Job Card**” button.



The screenshot shows a ticket titled "Unstable service" submitted by "du Plessis" 8 seconds ago. On the right-hand side, there is a sidebar with several sections: "Public Link", "Ticket Open for 9 seconds", "Updated 9 seconds ago", "Checklists" (with a "+ Add Checklist" button), "Calendar Events" (with a "+ Add Event" button), "Job Cards" (with a "+ Add Job Card" button, which is highlighted with a red box), and "Ticket Properties" (showing "Priority Normal"). Below the "Job Cards" section, it says "No Jobcards linked to this ticket".

A pop-up screen will appear. To create a job card for the customer, click on “**Add Jobcard**”. If you do not want to create a job card for the customer, click on “**Cancel**”.



The pop-up screen is titled "Add new Jobcard" and has a close button (X) in the top right corner. Below the title, it asks: "Are you sure you want to add a new Job Card to this ticket?". At the bottom, there are two buttons: a blue "Cancel" button and a green "Add Jobcard" button.

If the job card has been successfully created, a pop-up screen will appear to confirm that the job card has been added to the ticket. Click on the **x** or **close** button to close the pop-up screen.

Add new Jobcard



Job Card # 381 added to this ticket

Close

5.1.3. From the Job cards workflow section:

To manually add a job card, go to the “**Job cards**” phase of the workflow. On the right-hand side of the screen, look for the “**Add Job Card**” button and then click on it.

Workflow

Job Cards » New

Normal May 29, 2016 - May 29, 2017 [+ Add Job Card](#)

Copy Columns Clipboard Export Columns CSV Export Column Excel

Search:

	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent
Leads 3										
Surveys 12										
Quotes 4	2017-04-07 13:51:27	Payment Method Added 2 months ago								
Customers 4	2017-04-06 12:11:23	Quote Accepted 2 months ago								
Job Cards										
New 12	2017-04-16 14:25:18	Updated a month ago								

A pop-up screen with a blank job card will now appear. You can now start filling in the necessary details as well as schedule the job. For more details on how to fill in the job card, please view the section 6.2 covering the job card overview.

Add a new Job Card

Job No Job Number
Customer
Job Type Job Type

Schedule No event selected
Ticket No None

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
		Description	1	Yes	Serial Number	0.00	R 0.00

+ Add Another Line

Job Card Message











Total Discount R 0.00
Total Exclusive R 0.00
Total VAT R 0.00
Total R 0.00

Cancel
Drop files here or click to upload
Create Job Card

*Please note that all new job cards that are created can be found under job cards - new. Only once a job card has been scheduled on the calendar will it be moved to Job cards - Active.

5.2. Job card overview:

On the right-hand side of the sales lead you will find a **green** button. Click on this button to start scheduling the job.

Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent	
2017-05-25 07:31:57	Recurring Billing Confirmed 4 hours ago	376	JOB000354	Installation	Jacobus du Plessis	0777777777		44 Colquhoun Street, Llandudno, Gwynedd, LL55 2DD, North Wales	du Plessis	    
2017-05-25 11:17:26	Recurring Billing Confirmed 25 minutes ago	377	JOB000355	Installation	Jacobus du Plessis	0777777777		44 Colquhoun Street, Llandudno, Gwynedd, LL55 2DD, North Wales	du Plessis	    

A pop-up screen will appear. On this pop-up screen the quote can be updated and the job can be scheduled.

Edit Job Card #377

Job No
JOB000355

Customer
JF 800 L. Janssen de P...

Job Type
Job Type

Schedule
No event selected

Ticket No
702
View Ticket

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
Hardware	3.5 GHz Installation...	3.5 GHz Installation	1	Yes	Serial Number		
Call Outs	CALL001 - Standar...	Standard Call Out	1	Yes	Serial Number		
Connectivity	ins009 - installation ...	Installation item test 9	1	Yes	Serial Number		

+ Add Another Line

Job Card Message

Total Discount
R 0.00

Total Exclusive

Total VAT

Total

Close
Drop files here or click to upload
Generate Invoice
Update

Yellow: Here you can view the job card number.

Green: This shows you to which customer the job card is assigned to.

Choose what type of job it is. A list with options will appear as you start typing. For example:

Light Blue:

- Call Out - Non-chargeable
- Installation
- Installation Removal

Dark Blue: This section allows you to schedule the job on the calendar.

Purple: Here you can see the ticket number. If you click on the blue button, the ticket will open in a new tab.

Pink: Here you can view the original quote that was made out to the customer. You are still able to update the quote if need be.

Orange: All files that need to be uploaded can be dragged here.

Red: After all the necessary changes have been made and the job has been scheduled, click on the update button to save the changes.

After the job has been scheduled, the job card will be moved to job cards - Active.

2.3. Scheduling Jobs:

To schedule a job, click on the “[Schedule](#)” dropdown menu.

Edit Job Card #381

Job No
JOB000359

Customer
PALM JET - 424747888

Job Type
Callout

Schedule
No event selected

Ticket No
711

View Ticket

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
		Description	1	Yes	Serial Number	0.00	R 0.00

Add Another Line

Job Card Message

Total Discount
R 0.00

Total Exclusive
R 0.00

Total VAT
R 0.00

Total
R 0.00

Close

Drop files here or click to upload

Generate Invoice

Update

No event selected

May 2017
month week

Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Step 1:

To schedule an event, click on the drop-down menu found next to [Schedule](#). Once you can view the calendar, click on the day that you want to schedule the event on.

Add a new Calendar Event

Event Title

Event Title

Calendar

Installations

Teams

Event Date

2017-05-10

08:00

to

2017-05-10

09:00

Cancel

Add Event

Step 2:

Type in the **event title**. Please keep this relevant to the event being scheduled for example: Miss Williams - Installation / Miss Williams - Call Out.

Add a new Calendar Event

Event Title

Event Title

Calendar

Installations

Teams

Event Date

2017-05-10

08:00

to

2017-05-10

09:00

Cancel

Add Event

Step 3:

Next, is choosing on which calendar you want to schedule the event. Click on the drop-down menu and then choose the relevant calendar for example:: **Installations**.

Add a new Calendar Event

Event Title

Event Title

Calendar

Site Surveys

Teams

Event Date

Cancel

Step 4:

The next step requires you to allocate the even to a team. Click on the drop-down list next to **Teams** and select the team that you want to schedule for the event.

Dean Team

HS Team 1

HS Team 2

Inst Team 1

Team 2

Team 3

Add a new Calendar Event

Event Title

Event Title

Calendar

Installations

Teams

Event Date

2017-05-10

08:00

to

2017-05-10

09:00

Cancel

Add Event

Step 5:

Ensure that you schedule the event on the correct **date** and **time**.

When all the required fields have been filled in, click on the “**Add Event**” button.

Edit Job Card #128

Job No: JOB000109 Customer: [dropdown] Job Type: Job Type

Schedule: Mon 29 May 2017 08:00 - 09:00 Team 3 Miss W... Ticket No: 454 View Ticket

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
Hardware	3.5 GHz Installation...	3.5 GHz Installation	1	No	Serial Number	3,999.00	R 3,999.00
Call Outs	CALL001 - Stander...	Standard Call Out	1	No	Serial Number	350.00	R 350.00
Connectivity	ins009 - Installation ...	Installation Item test 9	1	No	Serial Number	150.00	R 150.00
Hardware	3.5 GHz Installation...	3.5 GHz Installation	1	No	Serial Number	3,999.00	R 3,999.00

+ Add Another Line

Job Card Message

Total Discount: R 0.00
Total Exclusive: R 7,454.38
Total VAT: R 1,043.62
Total: R 8,498.00

Close Drop files here or click to upload Generate Invoice Update

Step 6:

In the blue section, you can see the **date**, **time** and **team** that has been assigned to the event. If you are happy with this, click on the **Update** button.

5.4. Job cards - active:

This is a list of all jobs that are currently scheduled to happen. On this screen, you are able to **download** and print the physical job card as well as **update** the job card or mark the job as complete.

All Mine 10 records per page Search: d

	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent	
Leads 3											
Surveys 12											
Quotes 4	2017-05-25 16:03:27	Job Card Scheduled 4 days ago	377	JOB000355	Installation	Jennifer du Plessis	0799999999	25 May 2017 : 08:00 - 09:00	48 Caledon Street Lionviham Cape Town 7130 South Africa	du Plessis	
Customers 4	2017-05-29 07:44:51	Job Card Scheduled 3 hours ago	376	JOB000354	Installation	Jentest01	0799999999	29 May 2017 : 08:00 - 09:00	48 Caledon Street Lionviham Cape Town 7130 South Africa	du Plessis	
Job Cards	2017-05-29 10:26:59	Job Card Scheduled 30 minutes ago	379	JOB000357	Installation	double quotes	0722966502	29 May 2017 : 08:00 - 09:00	48 Caledon Street Lionviham Cape Town 7130 South Africa	du Plessis	
New 10	2017-05-29 10:51:08	Job Card Scheduled 5 minutes ago	380	JOB000358	Callout	Jacqueline du Plessis	0799999999	29 May 2017 : 08:00 - 09:00	105 Helderberg College Road Die Winard Cape Town 7130 South Africa		
Active 125											

5.4.1. What does the job card look like?

This is an example of what the job card looks like. Once a job is scheduled, a pdf version of this job card is automatically attached to the customer ticket. At the bottom of the job card there is a space for the **customer** as well as the **technician** to **sign** off on the job.



JOB CARD NO: JOB000357
 TICKET NO: 706
 ACCOUNT CODE:
 DATE: 2017-05-29
 CONTACT NAME:
 CONTACT NO:
 ASSIGNED TECHNICIAN:

FROM

VAT NO:

PHYSICAL ADDRESS:

POSTAL ADDRESS:

TO

CUSTOMER VAT NO:

PHYSICAL ADDRESS:

POSTAL ADDRESS:

Type	Description	Qty	Chargeable	Serial Number	Total
Installation	Short range installation		Yes		
Hardware	High Powered Router		Yes		

Customer Signature: _____ Date: 2017/05/____ Technician Signature: _____ Date: 2017/05/____



Total Exclusive: R
 Total VAT: R
 Total Inclusive: R

5.4.2. Completing the job:

To mark a job as completed, click on the **green** hand found on the right-hand side of the lead that you want to work on (see 5.3). You will now be able to update the job card and/or complete the job.

Edit Job Card #377

Job No JOB000355
Customer
Job Type Installation

Schedule Thu 25 May 2017 08:00 - 09:00 Team 3
Ticket No 702
View Ticket

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
Hardware	3.5 GHz Installation...	3.5 GHz Installation	1	Yes	Serial Number		
Call Outs	CALL001 - Standar...	Standard Call Out	1	Yes	Serial Number		
Connectivity	ins009 - installation ...	Installation item test 9	1	Yes	Serial Number		

+ Add Another Line

Job Card Message

Total Discount R 0.00
Total Exclusive
Total VAT
Total

Close
Drop files here or click to upload
Generate Invoice
Update
Complete Job

Here you can add files that you want to upload for example:

- Photos of the job that has been done
- The signed job card.

Purple:

*Do this before clicking on the **complete job** button.

Green:

If any changes were made to the job card, click on the update button to save these changes.

Red:

After the job has been completed and all necessary files have been uploaded, click on the **"Complete Job"** button.

After clicking on the **"Complete Job"** button, a pop-up screen will appear. To mark the job as completed, click on the **"OK"** button. To go back and make changes or add files to the job card, click on the **"Cancel"** button.

Are you sure you want to complete this job?

Cancel

OK

5.5. What happens once the job has been completed?

After the job has been completed, the job card will move to the invoicing phase of the workflow. The job card can be found under Invoicing - New. The job card will remain under job cards - Active until the job has been completed.