

## 5. Job Cards:

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

	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent	
Leads	2017-04-07 13:51:27	Payment Method Added									🔄 📄 📧 ✖
Surveys	2017-04-06 12:11:23	Quote Accepted									🔄 📄 📧 ✖
Quotes	2017-04-16 14:25:18	Updated	148	TEST	Installation						🔄 📄 📧 ✖
Customers	2017-04-16 22:53:49	Submitted	155	525234set	Installation						🔄 📄 📧 ✖
<b>Job Cards</b>	2017-04-16 22:54:10	Submitted	156	525234set	Installation						🔄 📄 📧 ✖
<b>New</b>											
Active											
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?

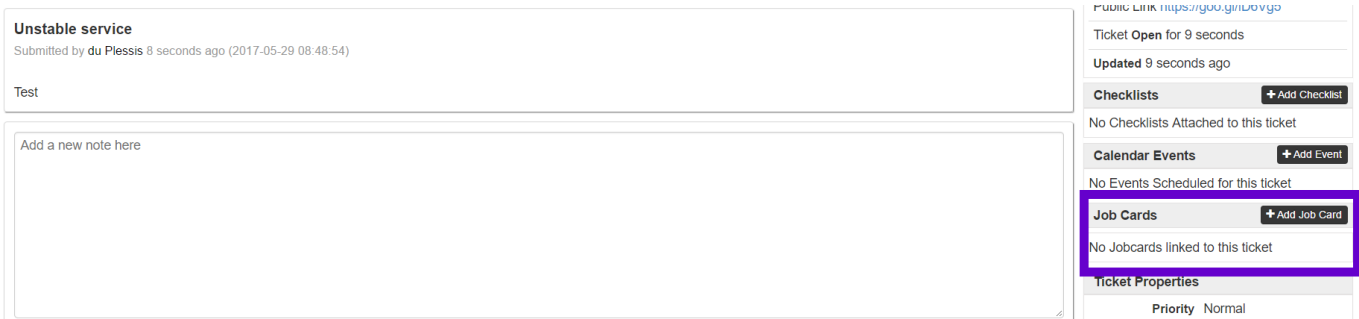
#### 5.1.1. Sales lead process:

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:

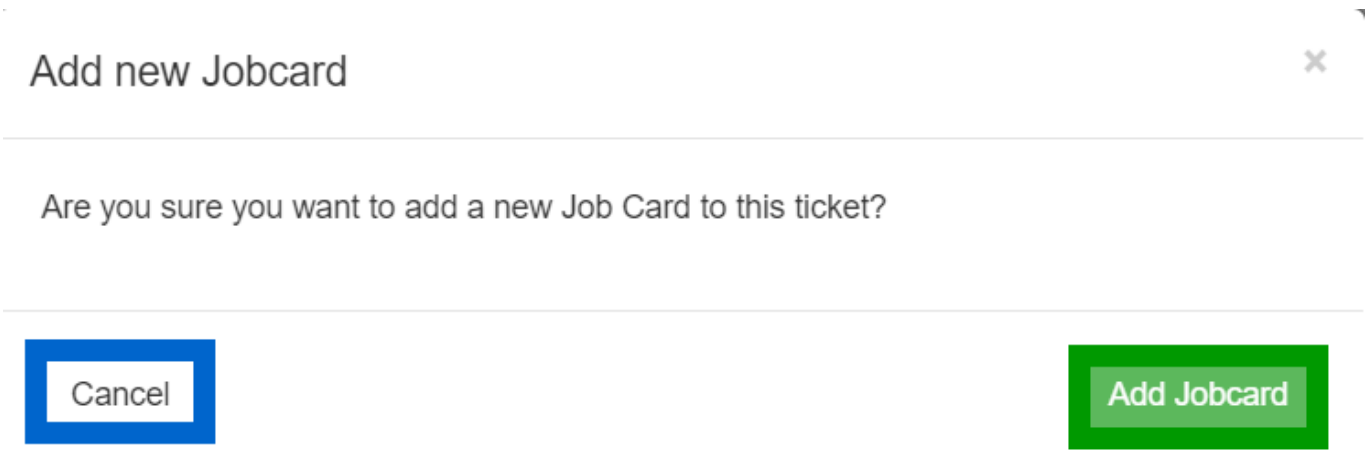
This manner will be used by helpdesk technicians who need to call out for the customer. The helpdesk technician will not be able to schedule the job itself, but once the job card has been created, it will automatically be assigned to the co-ordination department who will then schedule the job.

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. The ticket content is "Test". On the right-hand side, there are 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 highlighted in purple), and "Ticket Properties" (Priority: Normal).

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 dialog box is titled "Add new Jobcard" and contains the question "Are you sure you want to add a new Job Card to this ticket?". At the bottom, there are two buttons: "Cancel" (blue) and "Add Jobcard" (green).

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



### 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 Normal ▾ May 29, 2016 - May 29, 2017 + Add Job Card

Job Cards » New Copy Columns Clipboard   Export Columns CSV   Export Column Excel

All   Mine   10 records per page Search:

	Date	Status	Job Card ID	Job Card Number	Type	Contact Name	Contact Mobile	Date	Address	Sales Agent
Leads <span style="float: right;">3</span>										
Surveys <span style="float: right;">12</span>										
Quotes <span style="float: right;">4</span>	2017-04-07 13:51:27	Payment Method Added <span style="color: red;">2 months ago</span>								
Customers <span style="float: right;">4</span>	2017-04-06 12:11:23	Quote Accepted <span style="color: red;">2 months ago</span>								
Job Cards <span style="float: right;">12</span>										
+ New	2017-04-16 14:25:18	Updated <span style="color: red;">a month ago</span>								

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 ✕

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**Job No** 
**Customer** 
**Job Type**

**Schedule** 
**Ticket No**

Product Type	Product	Description	Qty	Chargeable	Serial Number	Incl Price	Total
<input type="text"/>	<input type="text"/>	Description	1	Yes	<input type="text" value="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

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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 <span style="color: red; font-size: small;">4 hours ago</span>	376	JOB000354	Installation	Jacobus Plessis	0770000000		48 Colson Street, Durban, Cape Town 7150 South Africa	du Plessis	<div style="border: 2px solid green; padding: 2px;"> </div>
2017-05-25 11:17:26	Recurring Billing Confirmed <span style="color: red; font-size: small;">25 minutes ago</span>	377	JOB000355	Installation	Jacobus Plessis	0770000000		48 Colson Street, Durban, Cape Town 7150 South Africa	du Plessis	<div style="border: 2px solid green; padding: 2px;"> </div>

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

<b>Job No</b> JOB000355	<b>Customer</b> JETROO L... Jetroo L...	<b>Job Type</b> Job Type
<b>Schedule</b> No event selected	<b>Ticket No</b> 702 <a href="#">View Ticket</a>	

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			
<a href="#">+ Add Another Line</a>							<b>Total Discount</b>	R 0.00
Job Card Message							<b>Total Exclusive</b>	
							<b>Total VAT</b>	
							<b>Total</b>	

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
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Job No

Customer

Job Type

Ticket No

**Schedule**

[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

Total Exclusive

Total VAT

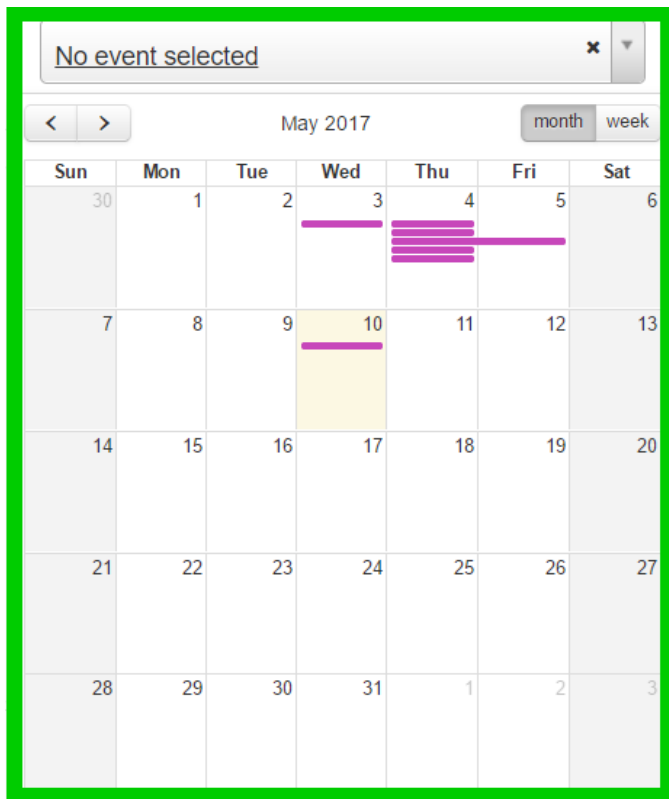
Total

[Close](#)

Drop files here or click to upload

[Generate Invoice](#)

[Update](#)



**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**

**Calendar** ■ Installations

**Teams**

**Event Date**   to

**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**

**Calendar** ■ Installations

**Teams**

**Event Date**

- Installations
- Installations
- Maintenance
- Operations
- Sales
- Site Surveys
- Standby Roster

**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**

**Calendar**

**Teams**

**Event Date**

- Dean Team
- HS Team 1
- HS Team 2
- Inst Team 1
- Team 2
- Team 3

**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.

Add a new Calendar Event

**Event Title**

**Calendar**

**Teams**

**Event Date**

**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

Job Card Message: [text area]

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: [input]

	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	[update] [print] [download]
Customers 4											
<b>Job Cards</b>	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	[update] [print] [download]
New 10											
Active 125	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	[update] [print] [download]
	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 Winerd Cape Town 7130 South Africa		[update] [print] [download]

### 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: [REDACTED]  
 DATE: 2017-05-29  
 CONTACT NAME: [REDACTED]  
 CONTACT NO: [REDACTED]  
 ASSIGNED TECHNICIAN: [REDACTED]

FROM  
[REDACTED]

VAT NO: [REDACTED]

PHYSICAL ADDRESS:  
[REDACTED]

POSTAL ADDRESS:  
[REDACTED]

TO  
[REDACTED]

CUSTOMER VAT NO:  
[REDACTED]

PHYSICAL ADDRESS:  
[REDACTED]

POSTAL ADDRESS:  
[REDACTED]

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

Customer Signature: \_\_\_\_\_ Date: 2017/05/\_\_\_ Technician Signature: \_\_\_\_\_ Date: 2017/05/\_\_\_

[REDACTED] Total Exclusive: R [REDACTED]  
 Total VAT: R [REDACTED]  
 Total Inclusive: R [REDACTED]

### 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
✕

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**Job No** JOB000355

**Customer** XXXXXXXXXXXXXXXXXXXX ✕

**Job Type** Installation

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**Schedule** Thu 25 May 2017 08:00 - 09:00 Team 3 Job Pl... ✕

**Ticket No** 702

View Ticket

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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:

**Purple:**

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

\*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.