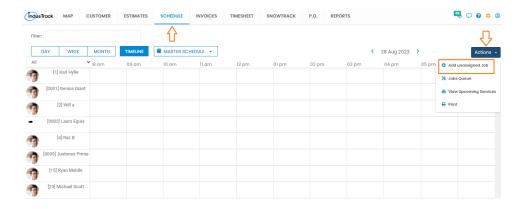
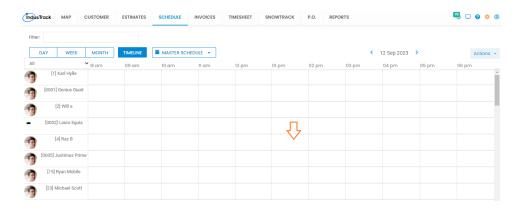
Scheduling a Job

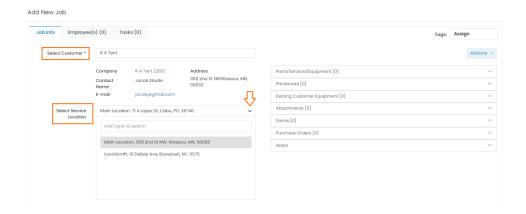
To add an unassigned job in the system, navigate to **Schedule** module and click **Actions** button, then select **Add Unassigned job**. If you don't yet know which field employee will perform the job, the best is to create an unassigned job. Once you have a clear direction on field employee assignment, you can go ahead and assign a crew member to that unassigned job.



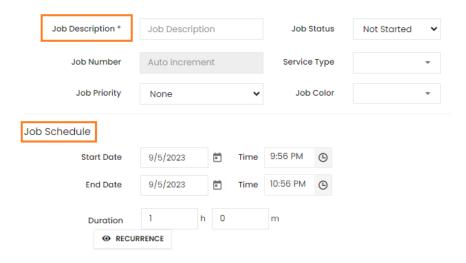
If you already know the field employee who will perform the job, you can add an **assigned job** by double-clicking on the grid for any field employee and the Add New Job screen will pop-up.



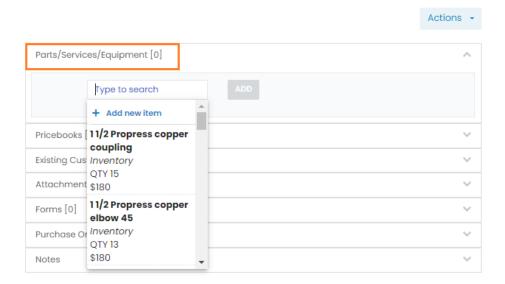
Assuming you have already uploaded your customers, search for the **Customer** and if the customer has multiple locations, you can choose one from the **Service Location** drop-down.



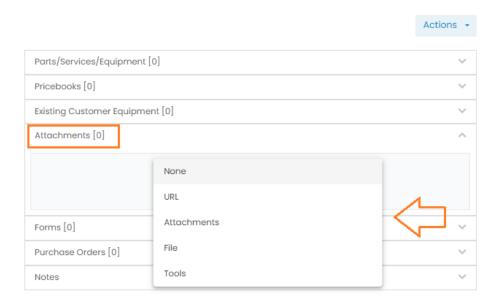
Add **Job Description** and at the bottom you can change the **Start** and **End** date/time and set the **estimated duration** for the job. Please note this is just an estimated duration that you have entered. The reports will show the actual start and end time that your field employees will record on the job site.



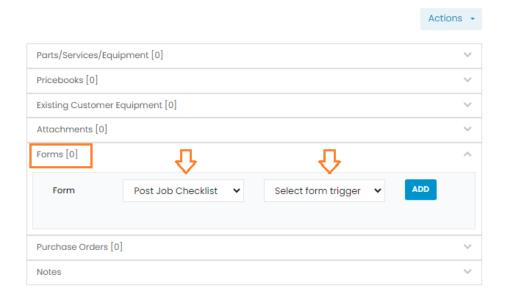
Assuming you already have items added in your inventory, you can now add the **parts/services/equipment** to this job. This is optional for dispatchers and techs in the field can add parts.



Go to the **Attachments** section and select the type of attachment from the drop-down. The attachments that are associated with the customer profile will also be displayed so you can select them if required.



Choose **Forms** to be filled out by your field employees. You can set the form trigger to ensure the forms will pop up for your field employees when the trigger condition is met.



If the job requires part, you can create a **purchase order** and attach it to a job.



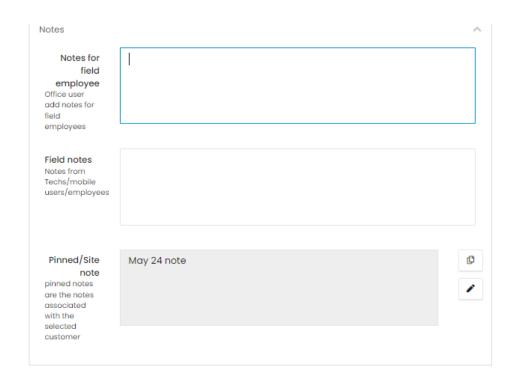
You can add notes for your field employees.

Please see below the details for each note:

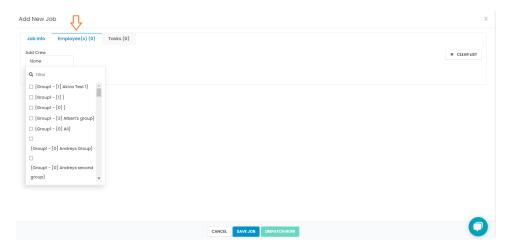
Notes for field employee: These are the notes entered by the office user/dispatcher. These can be the instructions for the field employees to inform them what service they would have to perform on the job site.

Field notes: These are the notes entered by the field employees using their mobile app. These can be the notes to inform the office users about what was done on the job site.

Pinned/Site note: These are the notes entered for your field employees. These can be the gate codes for accessing property or notes about the parts of the property that are regularly serviced.



Navigate to **Employee(s)** tab and assign one or more crew members to the job.



Once done, you can save the job and it won't be dispatched. If you choose to dispatch the job, your field employee(s) will be notified on their mobile app, and they can start the job.