

Jobs Management

'Jobs Management' gives an overview of the status of jobs and helps you plan work, by grouping different types of assets allocated to engineers.

This guide includes: Status Bar, Job Status, Job Types, and Selecting an individual customer.

1. Status Bar

This allows you to filter the information by the current status of the job.

Status

Any	TBC	Quoted	Scheduled	Started	Complete	Checked	Published	Void
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2. Job Status

Status	Description
TBC	Not scheduled and no Quote Number was entered
Quoted	Not scheduled but the Quote Number entered
Scheduled	Scheduled, with or without a Quote Number. Visible to engineers
Started	Started by an engineer
Complete	Completed by an engineer
Checked	Check is complete, which is the process that updates schedules
Published	Job has been published and the customer invoiced, if appropriate.
Void	Job was not completed but is retained for history

TIP! Please note that jobs with a status of Published or Void are deemed complete and only accessible when viewing jobs for a specific customer.

3. Job Types

Job Types	Description
Scheduled	A list of planned work converted into a job to be completed
New Job (Call Out)	A custom one-off job
Workshop Return	A job created to deliver and install Workshop Jobs which are Ready to Send.
Calibration	A job to calibrate assets

TIP! A job is only available to engineers once Scheduled and until Completed. A job cannot be deleted once transferred to the mobile system and editing is limited once started.

4. Selecting an individual customer

Click the “All Customers” field to narrow the search to individual customers.

Start typing in the name then select the correct option.

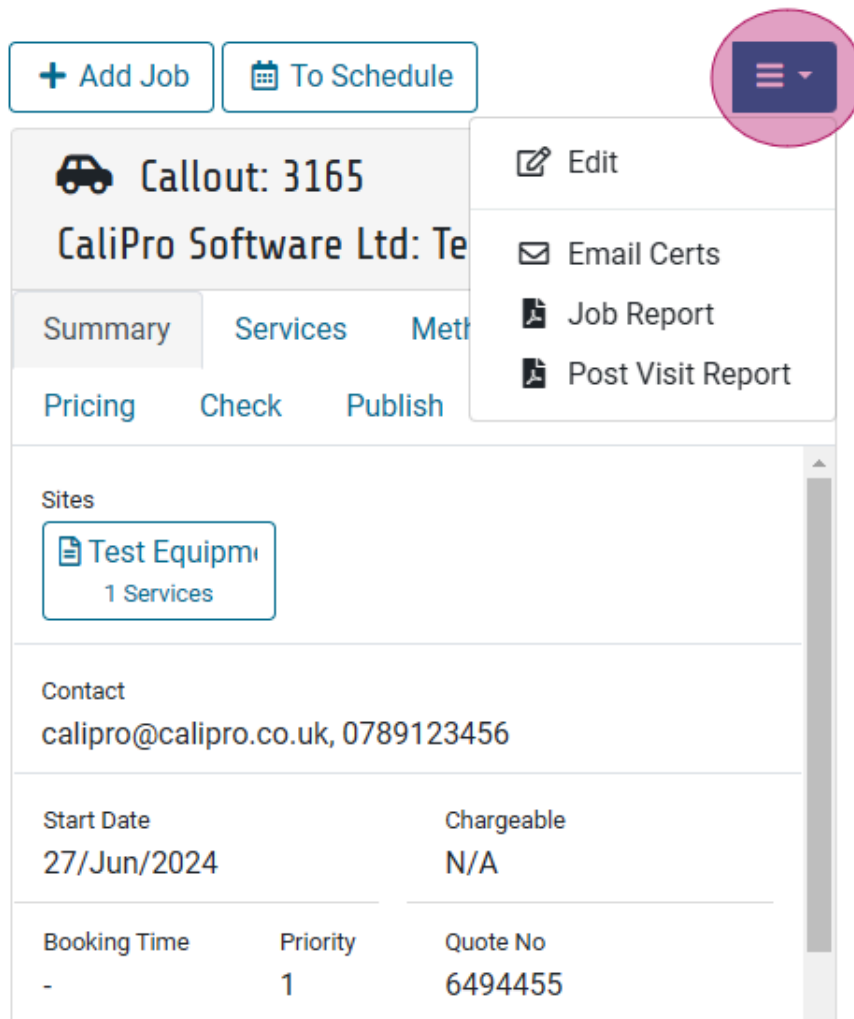
The screenshot shows the CaliPro Job Management interface. At the top, there's a header with the CaliPro logo and the title 'CaliPro - Job Management'. Below the header, there's a breadcrumb trail 'Home > Job Management'. The main area contains a search bar for 'Customer' with a dropdown menu showing 'All Regions'. The search bar is active, and a list of suggestions is displayed: 'CaliPro Software Ltd' and 'Grimsby Chemical UK'. The 'Grimsby Chemical UK' option is highlighted. To the right of the search bar, there's a 'Status' filter with buttons for 'Any', 'TBC', and 'Quoted'. Below the search bar, there's a 'Jobs' section with a table of job entries. The table has columns for Customer, PC, Job Type, PO, Start, Boo..., and D... The table contains three rows of data:

Customer	PC	Job Type	PO	Start	Boo...	D...
Nakatomi Products Ltd	ZX1	Callout	P058780	17/Oct/...	PM - 1	0
Nile Partners Ltd	ZX1	Calibration	P019194	22/Oct/...	-- 1	1
Grimsby Chemical UK	ZX1	Scheduled	P025562	25/Oct/...	-- 1	1

You can then use the status bar to filter further.

Summary information for the selected row is displayed in the multi-tab panel.

A context-sensitive menu that provides access to all eligible functions against a job.



The screenshot displays the CaliPro Software interface. At the top, there are two buttons: '+ Add Job' and 'To Schedule'. Below these, a job summary card shows a car icon, 'Callout: 3165', and 'CaliPro Software Ltd: Te'. A context menu is open, showing options: 'Edit', 'Email Certs', 'Job Report', and 'Post Visit Report'. Below the menu, there are tabs for 'Summary', 'Services', and 'Met'. Further down, there are buttons for 'Pricing', 'Check', and 'Publish'. The 'Sites' section shows 'Test Equipm' with '1 Services'. The 'Contact' section shows 'calipro@calipro.co.uk, 0789123456'. The 'Start Date' is '27/Jun/2024' and 'Chargeable' is 'N/A'. The 'Booking Time' is '-', 'Priority' is '1', and 'Quote No' is '6494455'.

TIP! Just above the detail panel is a smart button representing the most likely action based on the job status. New bespoke tabs or functionality can be added to meet your requirements.

For further support please email support@calipro.co.uk or call the helpdesk.



The image shows the CaliPro Software Ltd logo, which consists of a stylized 'C' inside a circle. Below the logo, the text 'CaliPro® Software Ltd' and 'Total Calibration Control' are displayed. To the left of the logo, the website 'www.calipro.co.uk' and the phone number '0116 410 5500' are listed. To the right, there is a 'UK Final SERVICE EXCELLENCE AWARD WINNER' badge for CaliPro Software Ltd, with a star icon and the text 'UK Final SERVICE EXCELLENCE AWARD WINNER'.