



Jobs Management

Schedule Management records how frequently assets are serviced and/or calibrated. This information then feeds through into other areas of the system such as Jobs.

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 is a header with the CaliPro logo and the text "CaliPro - Job Management". Below the header, there is a breadcrumb trail: "Job Management".

The main interface features a search bar for "Customer" with the text "ca" entered. A dropdown menu is open below the search bar, showing two options: "CaliPro Software Ltd" (highlighted in blue) and "Grimsby Chemical UK".

To the right of the search bar, there is a "Status" filter bar with three options: "Any", "TBC", and "Quoted".

Below the search bar, there is a "Jobs" section with a list of jobs. The list has columns for Customer, PC, Job Type, PO, Start, Boo..., and D... The following table represents the data in the Jobs list:

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.

+ Add Job To Schedule

Callout: 3165
CaliPro Software Ltd: Te

Edit
Email Certs
Job Report
Post Visit Report

Summary Services Met

Pricing Check Publish

Sites

Test Equipm
1 Services

Contact
calipro@calipro.co.uk, 0789123456

Start Date Chargeable
27/Jun/2024 N/A

Booking Time	Priority	Quote No
-	1	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.

CaliPro Software Ltd
Total Calibration Control

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WINNER**
CaliPro Software Ltd