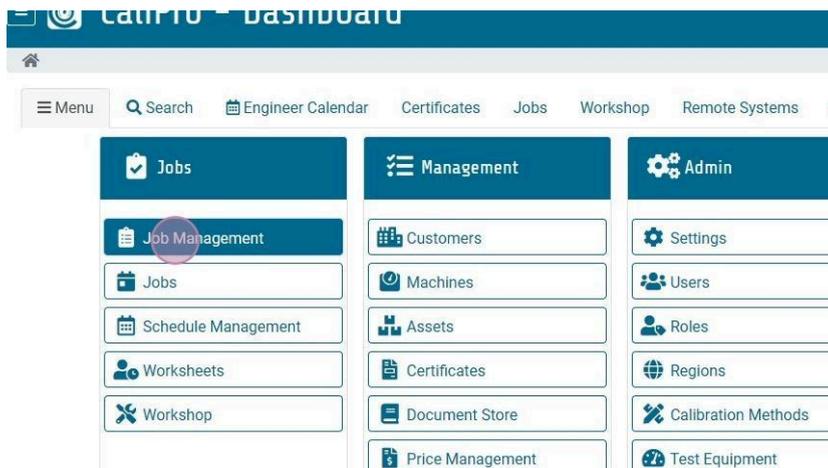


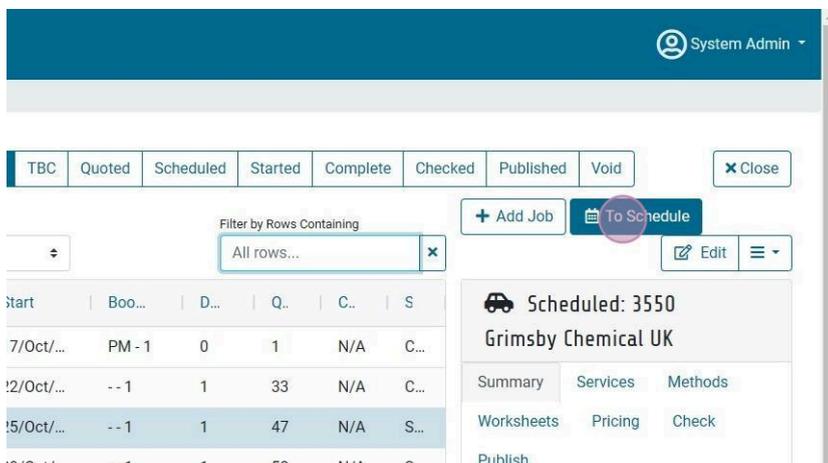
## Schedule a Job (in Jobs V2)

A step-by-step guide for scheduling a job within CaliPro.

1. Click "Job Management"



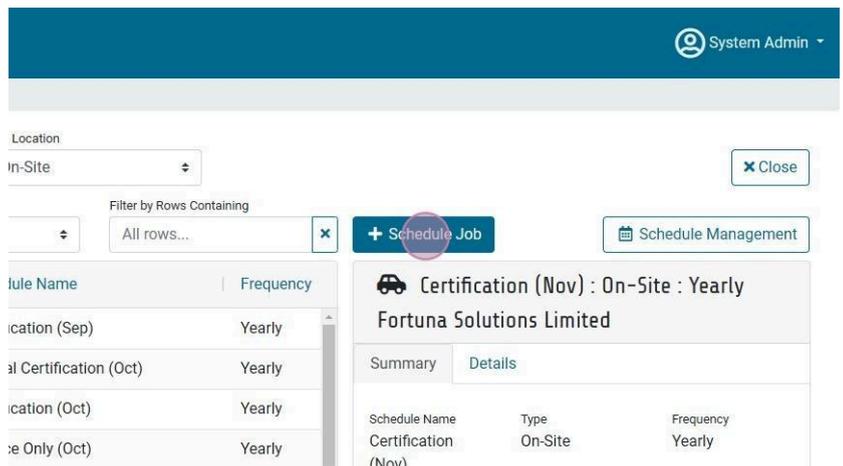
2. Click "To Schedule"



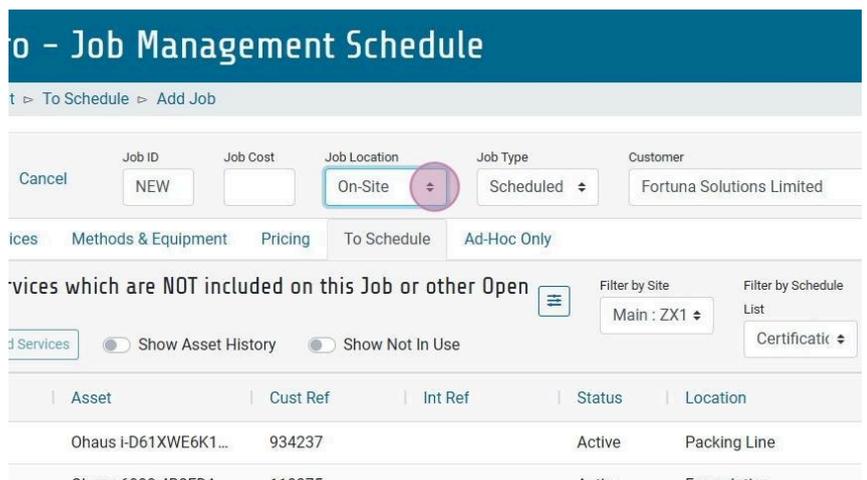
3. Select the customer

Fulcrum: Production	ZX1 1AA	On-Site	Certification (Sep)
Buzzpens Limited: Production	ZX1 1AA	On-Site	Annual Certification (Oct)
Nile Partners Ltd	ZX1 1AA	On-Site	Certification (Oct)
Fulcrum	ZX1 1AA	On-Site	Service Only (Oct)
Fulcrum	ZX1 1AA	On-Site	WB Certification (Mar)
Fortuna Solutions Limited	ZX1 1AA	On-Site	Certification (Nov)
Titanic Ltd	ZX1 1AA	On-Site	Certification (Nov)
CaliPro Software Ltd	ZX1 1AA	On-Site	Certification (Jan)
Nakatomi Products Ltd: Producti...	ZX1 1AA	On-Site	Certification (Jan/Jul)
CaliPro Software Ltd: Test Equip...	ZX1 1AA	On-Site	Certification (Jan)
Nakatomi Products Ltd	ZX1 1AA	On-Site	Certification (Jan/Jul)

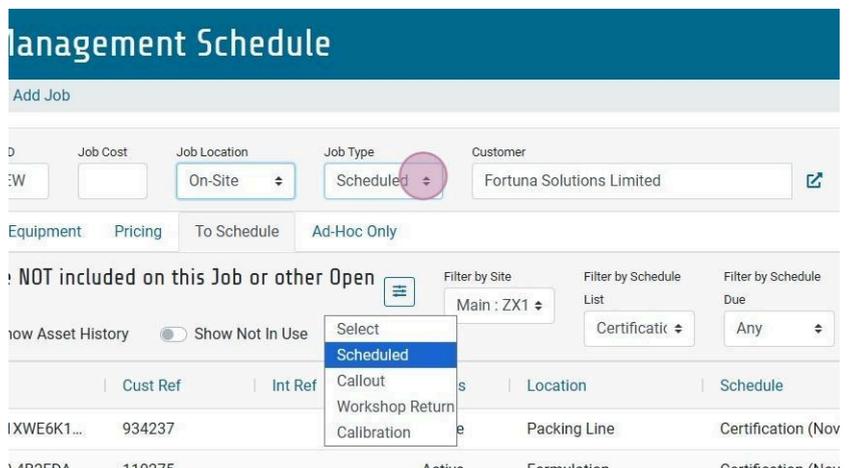
4. Click "Schedule Job"



5. Select the "Job Location" from the drop-down list.



6. Select the "Job Type" from the drop-down list.



7. Choose the items that need to be included in the job.

Summary Services Methods & Equipment Pricing To Schedule Ad-Hoc Only

Scheduled Services which are NOT included on this Job or other Open Jobs

+ Add 0 Scheduled Services Show Asset History Show Not In Use

<input type="checkbox"/>	Site Name	Asset	Cust Ref	Int Ref	Status
<input checked="" type="checkbox"/>	Main	Ohaus i-D61XWE6K1...	934237		Active
<input type="checkbox"/>	Main	Ohaus 6000 4B2FDA...	110275		Active
<input type="checkbox"/>	Main	Ohaus TD52XW 691B...	598267		Active
<input type="checkbox"/>	Main	Dini Argeo 3590 EGT ...	537786		Active
<input type="checkbox"/>	Main	Ohaus T32XW 142EA...	578705		Active
<input type="checkbox"/>	Main	Kern PCB 3500-2 CF...	124316		Active

8. Click "+ Add 4 Scheduled Services"

Job ID Job Cost Job Location Job Type Customer

✓ Create Job Cancel NEW On-Site Scheduled Fortur

Summary Services Methods & Equipment Pricing To Schedule Ad-Hoc Only

Scheduled Services which are NOT included on this Job or other Open Jobs

+ Add 4 Scheduled Services Show Asset History Show Not In Use

<input type="checkbox"/>	Site Name	Asset	Cust Ref	Int Ref	Status
<input checked="" type="checkbox"/>	Main	Ohaus i-D61XWE6K1...	934237		Active
<input checked="" type="checkbox"/>	Main	Ohaus 6000 4B2FDA...	110275		Active
<input checked="" type="checkbox"/>	Main	Ohaus TD52XW 691B...	598267		Active
<input checked="" type="checkbox"/>	Main	Dini Argeo 3590 EGT ...	537786		Active

The Scheduled Services chosen will now move to the job and disappear from this screen.

9. Click "Summary"

CaliPro - Job Management Edit

Job Management Edit Job

Update Job Cancel Job ID 3691 Job Cost 0.00 Job Location On-Site Job Type Scheduled Customer Fortur

Summary Services Methods & Equipment Pricing To Schedule Ad-Hoc Only

Scheduled Services which are NOT included on this Job or other Open Jobs

+ Add 0 Scheduled Services Show Asset History Show Not In Use

<input type="checkbox"/>	Site Name	Asset	Cust Ref	Int Ref	Status
<input type="checkbox"/>	Main	Ohaus D52XWQDR6 ...	447703		Active
<input type="checkbox"/>	Main	Ohaus T32XW 142EA...	578705		Active

10. Add the customer's "Contact Name" by clicking into the box and selecting from the drop-down list.

The screenshot shows the 'Edit Job' form with the 'Contact Name' field selected. A dropdown menu is open, listing 'Giovanni Rob...', 'Jules Terry', and 'Farhaan Ford'. The 'Giovanni Rob...' option is highlighted with a pink circle. The form also displays fields for Job ID (3691), Job Cost (0.00), Job Location (On-Site), Job Type (Scheduled), and Customer (Fortur). Other fields include Phone, Email, Customer PO, Invoice No, Chargeable (N/A), Priority (1), and Booking Time (N/A). The 'Service Summary' section shows Certification Qty: 4, and the 'Engineers' section indicates 'There are no engineers a job.'

### TIP!

If no names appear, they have not been added to the customer's record. To do this click on the icon to the right of the Customer field. This will open in a new tab.

The screenshot shows the 'Customer' field with the text 'Grimsby Chemical UK'. To the right of the field is a pink circular icon with a white square and a diagonal arrow, which is used to search for or add new customers.

The screenshot shows the 'Job Status' dropdown menu with the value 'Incomplete' selected. The dropdown arrow is visible on the right side of the field.

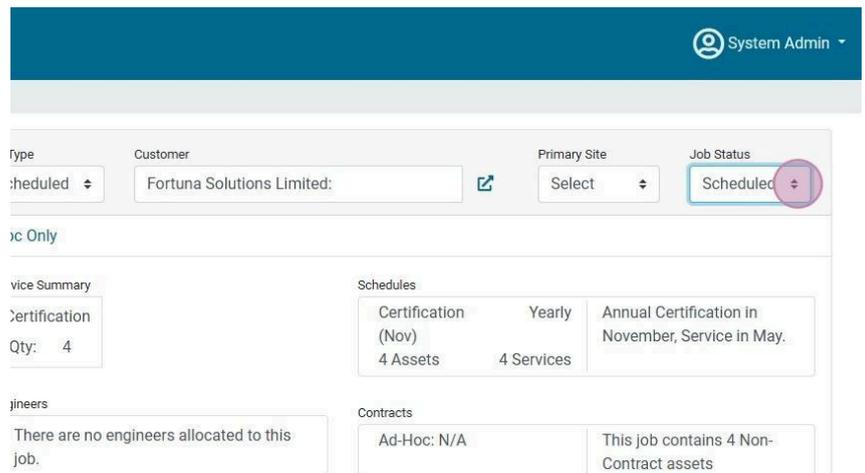
### TIP!

A job status of Incomplete means that the job schedule template has been set up but the date etc. has not been confirmed with the customer.

11. Once the date of the job is known it can be entered into the "Start Date" field.

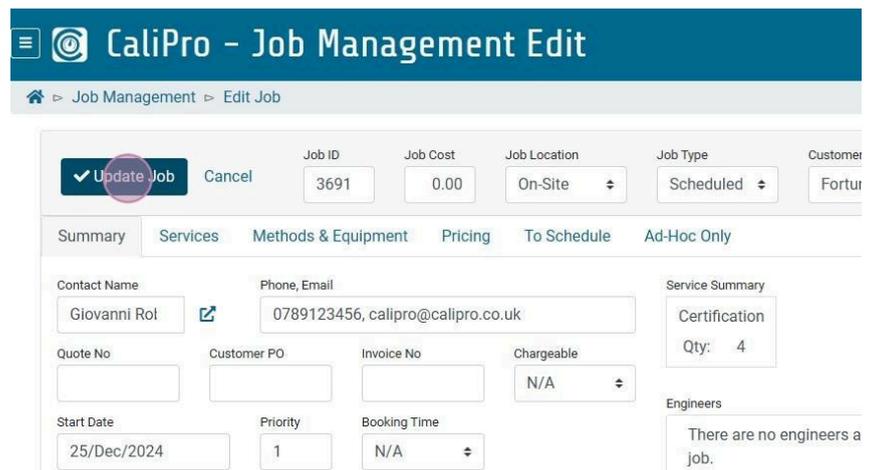
The screenshot shows the 'Edit Job' form with a calendar overlay for December 2024. The date '25' is highlighted in yellow. The form displays Job ID (3691), Job Cost (0.00), Job Location (On-Site), Job Type (Scheduled), and Customer (Fortur). The 'Phone, Email' field contains '0789123456, calipro@calipro.co.uk'. The 'Service Summary' section shows Certification Qty: 4, and the 'Engineers' section indicates 'There are no engineers a job.'

12. Once the job date has been entered the "Job Status" can be changed to 'Scheduled'.



The screenshot shows a web interface for job management. At the top right, there is a user profile icon and the text "System Admin". Below this, there are several input fields: "Job Type" (set to "Scheduled"), "Customer" (Fortuna Solutions Limited), "Primary Site" (Select), and "Job Status" (Scheduled). A red circle highlights the "Job Status" dropdown menu. Below these fields, there are sections for "Service Summary", "Schedules", "Engineers", and "Contracts". The "Schedules" section shows "Certification (Nov)" with "4 Assets" and "4 Services", and "Annual Certification in November, Service in May". The "Engineers" section states "There are no engineers allocated to this job." The "Contracts" section shows "Ad-Hoc: N/A" and "This job contains 4 Non-Contract assets".

13. Click "Update Job" to save the record.



The screenshot shows the "CaliPro - Job Management Edit" interface. At the top, there is a navigation bar with the CaliPro logo and the text "CaliPro - Job Management Edit". Below this, there is a breadcrumb trail: "Job Management > Edit Job". The main content area has a header with "Update Job" (highlighted with a red circle), "Cancel", "Job ID" (3691), "Job Cost" (0.00), "Job Location" (On-Site), "Job Type" (Scheduled), and "Customer" (Fortuna Solutions Limited). Below this, there are tabs for "Summary", "Services", "Methods & Equipment", "Pricing", "To Schedule", and "Ad-Hoc Only". The "Summary" tab is active, showing fields for "Contact Name" (Giovanni Rol), "Phone, Email" (0789123456, calipro@calipro.co.uk), "Service Summary" (Certification Qty: 4), "Quote No", "Customer PO", "Invoice No", "Chargeable" (N/A), "Start Date" (25/Dec/2024), "Priority" (1), and "Booking Time" (N/A). The "Engineers" section states "There are no engineers allocated to this job."

## TIP!

A job can be scheduled months in advance as long as the date is entered. The record can then be updated with the engineer's name, purchase order numbers, etc. nearer the time. It will not appear on an engineer's calendar until the name has been entered.

14. For further support please contact our helpdesk via [support@calipro.co.uk](mailto:support@calipro.co.uk)



The image shows the CaliPro Software Ltd logo and contact information. The logo features a stylized 'C' with a clock face inside, followed by the text "CaliPro® Software Ltd" and "Total Calibration Control". Below the logo, there is a globe icon and the website "www.calipro.co.uk", and a phone icon and the number "0116 410 5500". To the right, there is a "UK First SERVICE EXCELLENCE AWARD WINNER" badge for CaliPro Software Ltd, with the website "calipro.co.uk" and the year "2023" below it.