Job Tracker Professional

Relating Customers and Clients

Assigning a Customer to a client allows Job Tracker Profession to automatically fill in when a Customer/Address is selected. This saves time when filling out both Jobs and Quotes

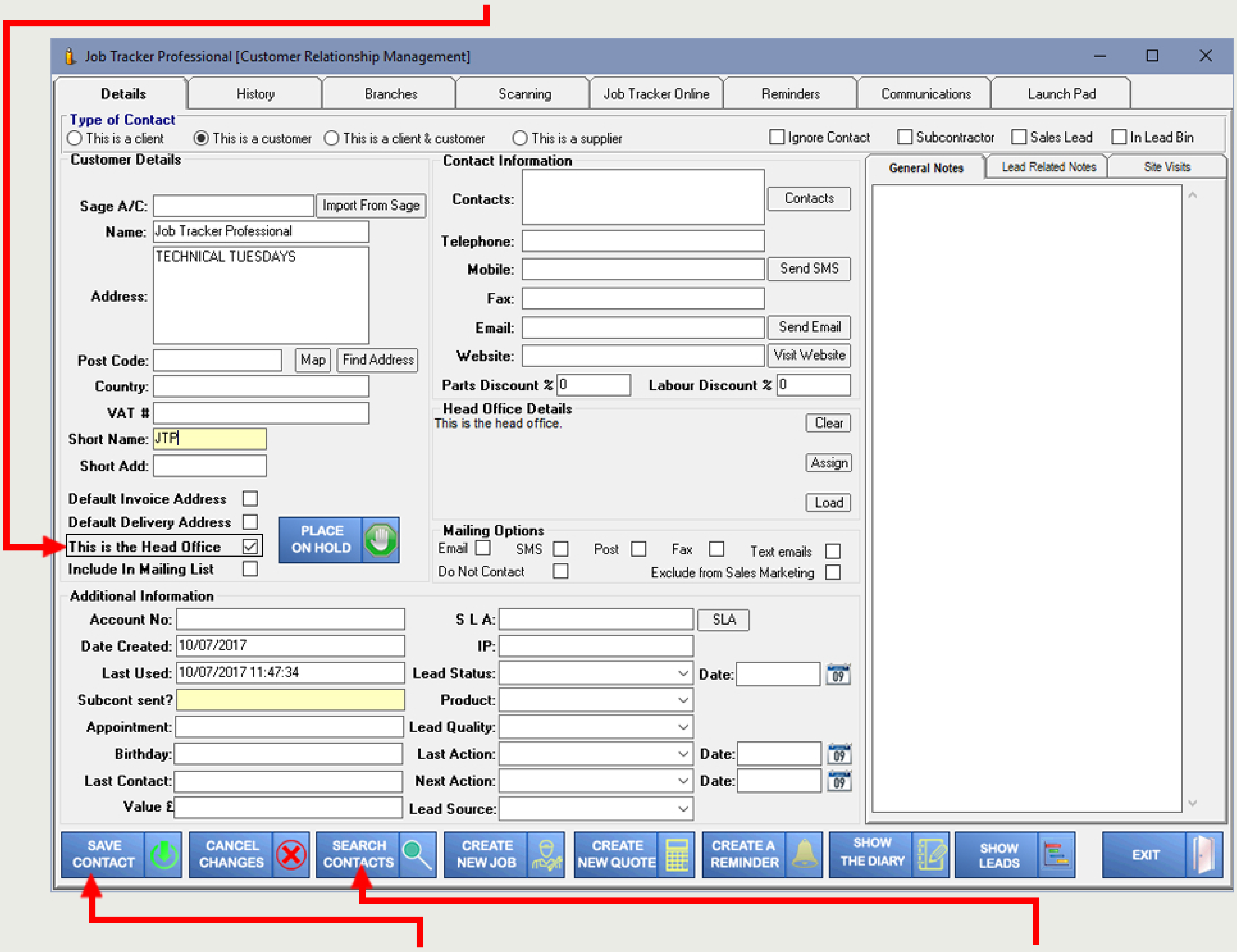
Open Job Tracker Professional.

Click on the contacts screen.

Click on 'Search Contacts'.

In the Search field, enter the name of the Client that you would like to assign a customer to. Then press the 'search' button to the right of the screen. Double click on the correct Client within the results in order to load the page

Make sure that the tick box, 'This is the Head Office' located within the left middle of the screen, is ticked.



Once complete, click 'Save Contact' at the bottom of the screen, then click 'Search Contacts'.

Within the search field, type in the name of the customer that you would like to be assigned to the client and load the contact. Ensure to save the contact when complete.

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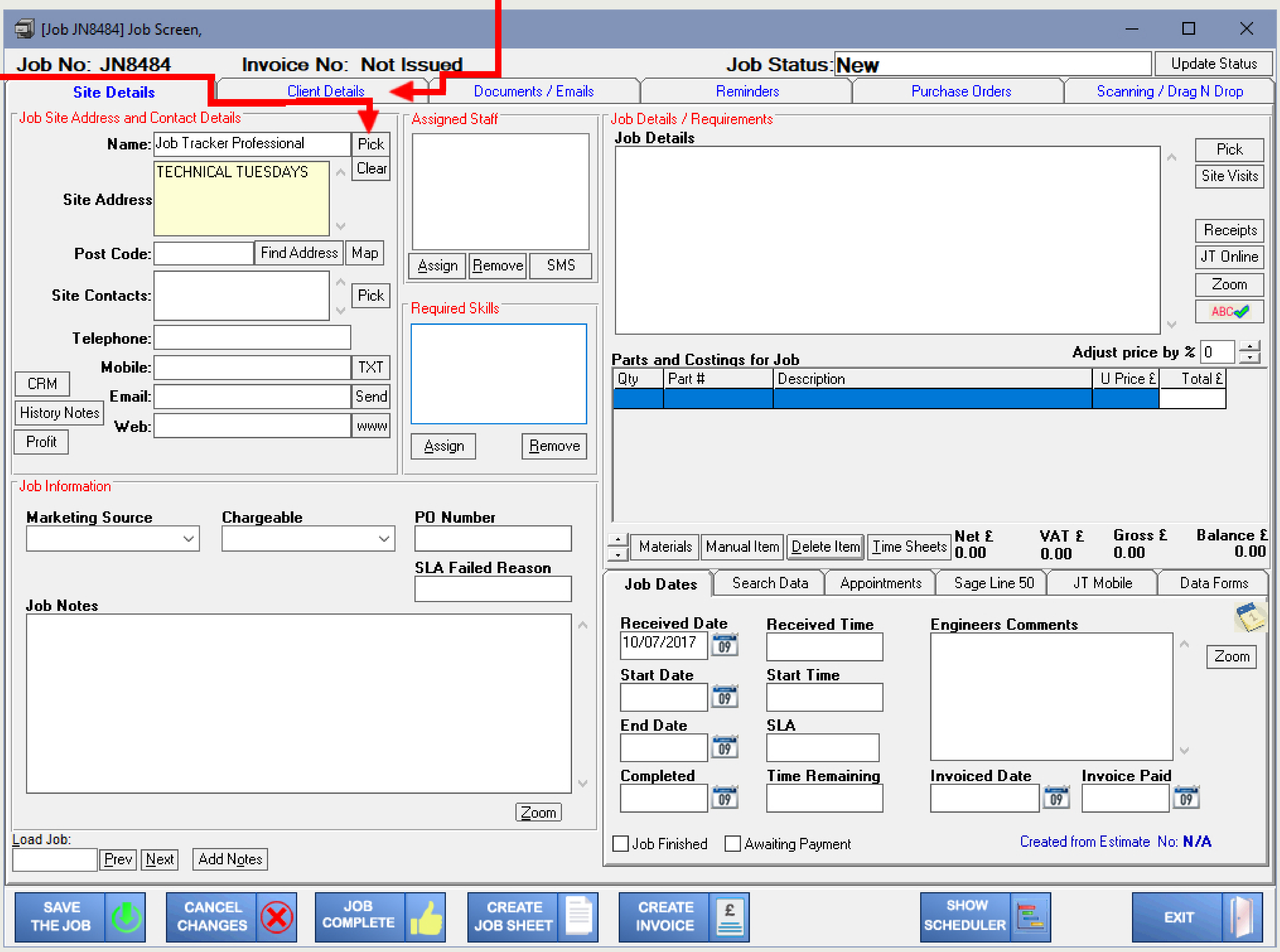
In the middle of the screen under ‘Head Office Details’, click on the ‘Assign’ button.

you will then be able to search for the Client you would like the customer to be assigned to.

Make sure to click 'Save contact' when all complete.

You will then be able to click on the Jobs, from the Job Tracker home screen then, click on the ‘Pick button at the top of the screen and select the name of a customer.

Once loaded, click in the ’Client details’ tab, Job Tracker Professional will pull in the client details that have been added to that customer.



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