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.

Details	History	Branches	Scanning	Job Tracker Online	Reminders	Communications	Launch Pad	
Type of Contact	This is a customer) This is a client & (customer O This is a	supplier	Ignore Contac	t 🔄 Subcontrac	tor 🗌 Sales Lead 🔲 Ir	n Lea
Customer Details	-		Contact Information			General Notes	Lead Related Notes	Site
			Contacte		Contacts		,i	
Sage A/C:		mport From Sage	condets.					
Name: Job In	acker Professional		Telephone:					
TECH	NICAL TUESDAYS		Mobile:		Send SMS			
Address:			Fax:					
			Email:		Send Email			
Post Code:	Man	Find Address	Website:		Visit Website			
Fost Code.	Мар		Parts Discount %	Labour Disc	count % 0			
VAT #			Head Office Details					
Short Name: JTP			This is the head office.		Clear			
Short Add:					Assign			
Default Invoice Ad	dress				Load			
This is the Head O			Mailing Options	Real D Fau				
Include In Mailing	List		Do Not Contact	Exclude from	Sales Marketing			
Additional Informat	tion							
Account No:			SLA:	SL	A			
Date Created: 10	/07/2017		IP:					
Last Used: 10	/07/2017 11:47:34	Lea	d Status:	✓ Date	e: 09			
Subcont sent?			Product:	~				
Appointment:		Lea	d Quality:	~				
Birthday:		La	st Action:	√ Dat	e: 🛛 📅			
Last Contact:		Ne	st Action:	∽ Dat	e: 🛛 📅			
Value £		Lead	d Source:	~				
SAVE	CANCEL	SEARCH	CREATE			iow 👝		
	CHANGES 🚫		NEW JOB			DIARY	LEADS	TIXE

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.

	🗐 [Job JN8484] Job Screer	ı,					-		×
	Job No: JN8484	Invoice No: Not Issu	led		Job Status: N	ew		Update	Status
Í	Site Details	Client Details	Doc	cuments / Emails	Reminders	Purchase Orders	Scanning	/ Drag N I	Drop
	Job Site Address and Contact Details Name: Job Tracker Professional Pick			f Job [Job				Pick	

Site Address Post Code: Find Address Mobile: Telephone: Mobile: TXT Assign Bemail: Send History Notes Web:	Site Visits Receipts JT Online Zoom Abc Qty Part # Description U Price £ Total £
Job Information Marketing Source Chargeable PO Number SLA Failed Reason SLA Failed Reason Job Notes	Materials Manual Item Delete Item Time Sheets Net £ VAT £ Gross £ Balance £ Job Dates Search Data Appointments Sage Line 50 JT Mobile Data Forms Received Date Received Time Engineers Comments Zoom 10/07/2017 Start Date Start Time Zoom End Date SLA Invoiced Date Invoice Paid Image: Start Time Invoiced Date Invoice Paid Image: Start Time Image: Start Date Start Date Start Time Image: Start Time Image: Start Time Image: Start Date Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Date Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Date Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time Image: Start Time
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