Maintenance

How to add a new customer Application ► Customer ► New Customer

What to do if the customer is not having an id Application ► Customer ► Generate Id No

How to change customer details Application ► Customer ► Modify customer

How to create new application Application ► Application ► New application

How to Change application details Application ► Application ► Modify application

How to create a new appointment Schedule ► Appointment ► Create Appointments

How to create New service estimate Estimation ► Service Estimate New ► New

How to change new service estimate Estimation ► Service Estimate New ► Update

How to create new estimate Estimation ► Estimate ► New

How to modify new estimate Estimation ► Estimate ► Modify

How to Approve / Reject Estimate You can find estimates to be approved from system

Dashboard or you can go to Estimation ► Estimate ►

approve / Reject

How to search existing application Application ► Search Application

How to undo rejected estimate Estimation ► Estimate ► undo rejects

Estimation ► Job creator How to create a job

How to allocate job to a contractor Manage jobs ▶ job contractor ▶ Job Allocation

How to revise a job Manage jobs ► Jobs ► Revise jobs

How to approve revised Job Manage jobs ► Jobs ► Approve Revise jobs

How to undo rejected Jobs Manage jobs ► Jobs ► Undo rejected jobs

How to finish the job Manage jobs ► NC job Finalize ► NC job finish

How to Prepare Contractor Bill Manage Jobs ► Job contractor ► Contractor Bill How to download contractor bill

Manage jobs ➤ Job contractor ➤ Contractor Bill

manage

How to Send to Billing Data

Mange Jobs ➤ Billing ➤ Send to Billing

How to go to estimate batch approval

Estimation ➤ Estimate ➤ Batch approvals

How to add Maintenance jobs

Manage jobs ➤ Jobs ➤ Maintenance Jobs

How to do job batch approvals

Manage jobs ► Jobs ► Batch approvals