

Knowledge Base



Viewing Existing Jobs

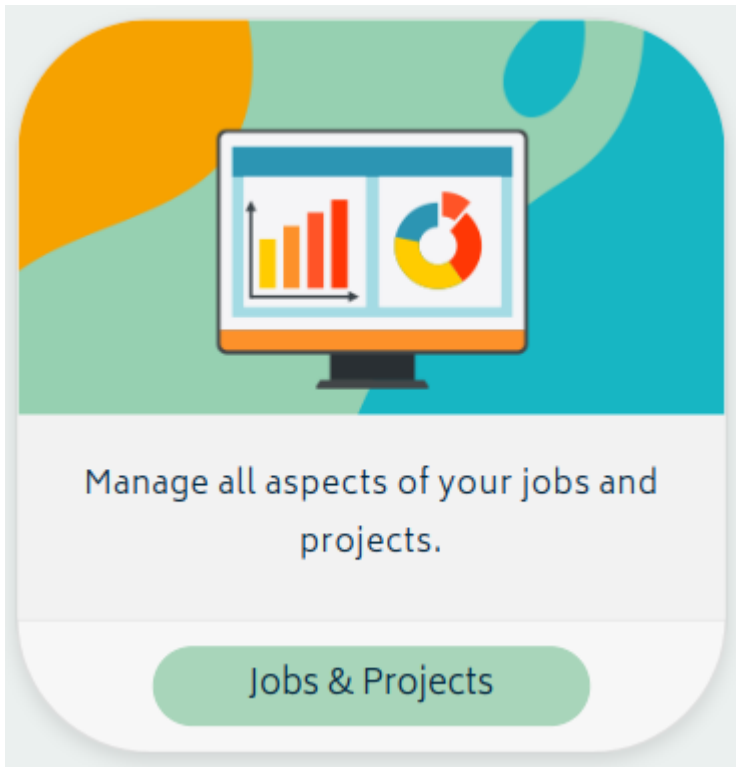
Last updated on August 8th, 2023

Job List Page

The [Job List Page](#) allow users to view all the existing job in the system and take actions against those jobs. The page also allow users to make any changes to the existing jobs as required.

To view all jobs in the system:

- Click “Jobs & Projects” from the Navigation Dashboard.



- Click “See All Jobs.”

Job and Project Management

Create a New Job

See All Jobs

Record Consumables

Job Scheduler Page

View Job Performance

View Profitability of All Jobs

Clone a Job

Mark a Job As Complete

Back

- You will be presented with the job list page:

Jobs

HelpFeedback

Customer Jobs

Draft

Quoted

Approved

All Open

Completed

Rejected

All

Search

Add

Import Jobs

Refresh

Table Options

Show jobs with these tags...

Do not show jobs with these tags...

Job reference	Customer	Job Title	Customer Reference	Job Contact Name	Job Contact Number	Preferred Start Date	Quoted Amount	Involved Amount	Deposit Amount	Last Update	
J00001	<div><div></div>City Limousines</div>	Replace Fan & Downlights	-	Scott Mercer	5263985	16 Aug 2024	583.00	583.00	No deposits	04 Sep 2024, 16:34	Job Actions
J00003	Bank West	Job	-	-	-	28 Aug 2024	135.00	Not Invoiced	No deposits	30 Aug 2024, 16:32	Job Actions
J00004	Basket Case	-	-	-	-	16 Aug 2024	99.55	Not Invoiced	No deposits	23 Aug 2024, 16:32	Job Actions

Options and Filters

There are a number of different elements in the option bar that will allow you to filter and perform actions on the jobs.

Customer Jobs	Draft	Quoted	Approved	All Open	Completed	Rejected	All
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Job Status Selector: By default, the system shows “All Open” jobs. Open jobs refers to any jobs which are in draft, quote, or approved status. You can choose which jobs you want to see, including rejected or completed jobs. Refer to [Job Actions](#) for more information on completing jobs.

Search

Search Bar: The search bar allows users to search for a job based on any of the following fields:

- Job Reference Number
- Customer’s Name
- Job Title
- Customer’s Purchase Order (PO) number

Show jobs with these tags... ▼

Do not show jobs with these tags... ▼

Tag Fields: You can enter tags to filter jobs by custom requirements. Refer to [Tags](#) for more information.

Add

Add job button: You can click the “Add” button to create a new customer job. Refer to [Creating a Job](#) for more information.

Refresh

Refresh button: If multiple users are using Gojee at once, jobs may be updated in the background. This will get the latest data for the jobs.

Import Jobs

Import Jobs button: This button allows you to import multiple jobs at once via CSV. The following are required for import:

- Job Reference Number
- Job Title
- Customer Name
- Items to be used on the job

This is useful if you are migrating existing jobs from another system or you would like to create jobs in bulk.

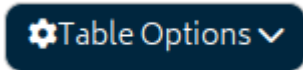


Table Options: Clicking this opens up the Table Options menu shown below. With the table options, you can do the following:

- Filter by job type
- Filter by invoice and purchasing status
- Filter by sales person responsible for the job
- Display and remove columns

When you open up the Table Options, these options will appear.

Filters

☒ Do and Charge
 ☒ Fixed Price (Quote)
 ☒ Point of Sale

Has approved invoice?
 Has purchase order?
 Quote sent?

Approved for Purchasing?

Filter by Sales Person...

Columns

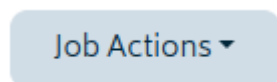
☐ Sales Person
 ☒ Customer
 ☐ Quote Type
 ☒ Job Title
 ☒ Preferred Start Date
 ☒ Last Update
 ☐ Job Location
 ☒ Customer Reference

☒ Deposit Taken
 ☒ Quoted Amount
 ☒ Job Contact Name
 ☐ Quote Estimated?
 ☐ % Invoiced
 ☒ Invoiced Amount (Exc. GST)
 ☒ Job Contact Number

You can use them to filter jobs by type, quote status, invoice status, whether they are approved for purchasing, or whether they have an outstanding purchase order associated with them. You can also use the checkboxes to customize the display of information to your liking by showing and hiding columns.

Selecting a Job

Simply click on the row of a job to navigate to the job edit page for the job.



The [Job Actions](#) button can also be used as a quick navigation to go to the section of the job you're interested in. See the next section for more details.

Next: [Job Actions](#).