

Archive Rules for Jobs

Settings – Archive Rules allows the user to archive off jobs which have been completed for a long time and you no longer want showing on the live operational system.

Archive Rules

Allows you to set up archive rules for the jobs.

From here the User can Create Archive Rules with 5 different Rule Types as seen the in screen shot below. You also have to specify the number of days to elapse before the job is archived.

Create Archive Rule

Rule Name

Rule Type

- Job With Rejected Sales Quote
- Job With Open Sales Quote
- Open Job
- Completed Job
- Cancelled Job

Rule Name - The Name of the Rule

Rule Type - The Type of the Rule

Days - The number of days after which the jobs should be archived for the rule

Jobs can also be **'Unarchived'** . On all the main Job lists you can filter on Archived Jobs.

Open / Closed: <Open / Closed> Reactive / Planned: **Reactive Only** Site: <All Sites> Resource: <All Resources> Assigned User: <Assigned Users> Team: <All Teams> Job Priority: Job Type: <All Job Types> Sub Type: <All Sub Types> Clear More Quick Links

Order Number: Job Number: Order Number Job Number

Status: <All Statuses> Sub Status: <Sub Statuses> Job Type Relevance: <Relevance> Performance: <Performance> Alerts: <All Alerts> Created Date: <Created Date>

Location: <Locations> Sub Location: <SubLocations> Regions: <All Regions> Site Type: <All Site Types> Job Category: <All Job Categories>

Planned Schedule: <Planned Schedule> Schedule Category: <Schedule Category> Schedule Group: <Schedule Groups> Compliance Type: <Compliance Type> Asset Class: <Asset Class> Asset Sub Class: <Asset Class> Assets: <Assets>

Quote Job: <Yes / No> Contractor Quote Status: <Contractor Quote> Sales Quote Status: <Sales Quote Status> Revenue Jobs: <Revenue Jobs> **Archived Jobs: Archived**

This will display all archived Jobs on the grid. Then by hovering over the job details, click Quick Actions and then **Unarchive**

#	Details	Job Type	Contract	Site	Location	Status
14	Broken Sink	Description: Broken Sink		Biarritz	Normal site	Complete
13	Cleaning Job			Biarritz	Normal site	Complete
8	Window Broken on 1st floor			Biarritz	Normal site	Complete

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