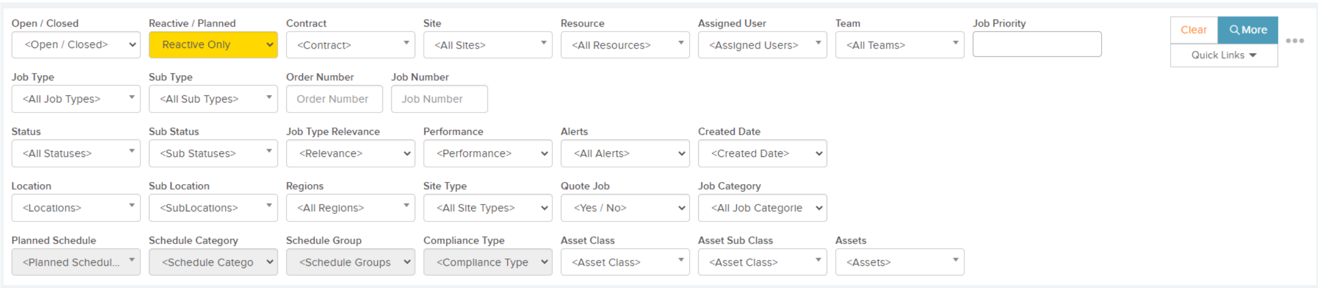
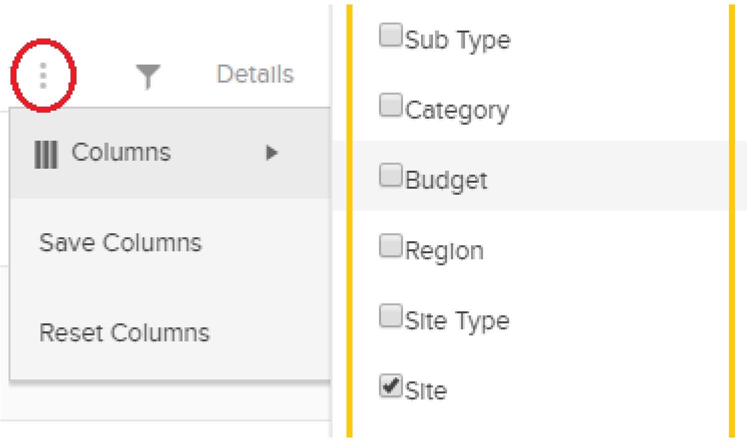
Jobs List

The *Jobs List* view helps you to observe key job information row by row in one clear list.

You can filter the jobs on any criteria, including a text box that allows you to search by job number. Click on *More* at the top right of the page to reveal the filtering options:



The grid can be sorted by clicking on any of the column headings. You can also add or remove columns from the grid to display the information you want to see. Simply click on the three dots next to the job number column heading:



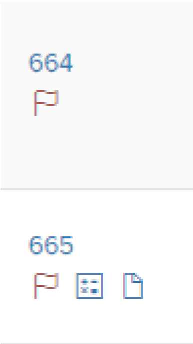
For example, if you would like to filter jobs by the relevant teams, you can add this column:

Team
Plumbing
Plumbing
Plumbing

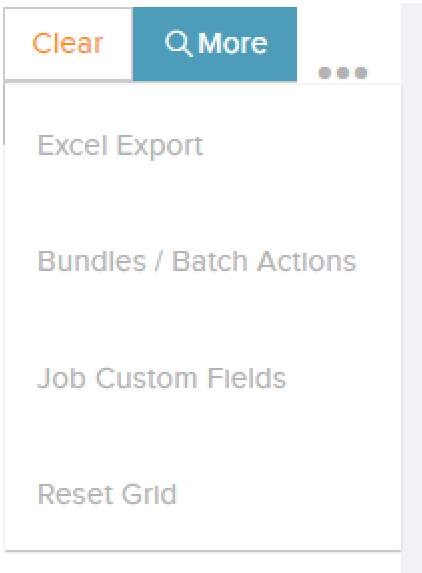
Overdue work is highlighted in red, and jobs can be colour coded by assigned user:

Status	Created	Expected	Priority	Assigned
Complete	30/08/2018 14:15	08/11/2018 19:30		Facilities
Complete	31/08/2018 16:02	31/08/2018 16:01		Team
Instructed	03/09/2018 12:52	27/09/2018 12:51		Eric
Instructed	03/09/2018 12:53	23/09/2018 19:52	Low	Pauline

Icons under the job number indicate if there is an alert, a document, assets, quotes etc. assigned to that job. Hovering over these icons will display pop-up telling you what each icon means:



The three dots next to the *More* button reveals these options:



- **Bundles / Batch Options** – This will bring you to the *Bundles / Batch Actions* view where you can groups jobs together into a bundle. Grouping jobs allows you to perform actions across the entire group such as:
    - Assign multiple jobs to a resource / contractor
    - Instruct multiple jobs to a resource / contractor
    - Complete multiple jobs
    - Approve multiple jobs
    - Cancel multiple jobs

- **Excel Export** – This will allow you to export the jobs list to an Excel sheet.
- **Clear All Filters** – This will remove any filters you have applied to the list.
- **Reset Grid** – This will reset the Job List Grid to list

all the original columns.

Your company job history can also be uploaded to Trackplan, a good tool for keeping track of your job history over the last few years. Please contact a member of Trackplan Customer Support for this template.