

Planned Jobs

The *Planned Jobs* list shows a grid containing information on all planned jobs. You can view and edit details, complete, and cancel jobs by selecting the job number (#) from the list.

You can customise the information displayed in the columns by checking columns you wish to include.



You can filter the Planned Jobs list by selecting the *Filters* button which will display various filtering options for you to choose from, including by Job Number:

Open / Closed <Open / Closed>	Reactive / Planned Planned Only	Contract <Contract>	Site <All Sites>	Resource <All Resources>	Assigned User <Assigned Users>	Team <All Teams>	Job Priority 	Clear	More	***
Job Type <All Job Types>	Sub Type <All Sub Types>	Order Number Order Number	Job 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>	Quote Job <Yes / No>	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>				

Selecting the three dots next to the *Filters* button will display these options:

Clear

More

...

Excel Export

Bundles / Batch Actions

Job Custom Fields

Reset Grid

- **Bundles / Batch Actions** – this option will bring you to

the *Bundles / Batch Actions* view where you can group jobs together in a bundle. By bundling jobs together, you can perform actions on the grouped jobs in one go. You can, for example, assign or instruct multiple jobs to a specific Resource / Contractor, or complete / approve / cancel multiple jobs.

- **Excel Export** – this option allows you to export the *Reactive Jobs* list to an Excel sheet.
- **Job Custom Fields** – Capture extra information about your jobs . You can set up a template of fields / questions and then associate the form to one or more job types. You can set up as many forms as you like to cover the different job types. When a job or request is created it's job type will define the form of custom fields to be entered. You can also view and export the extra information by clicking on the view data button by each form.
- **Reset Grid** – This will reset the Planned Job List to its original state

You can access the *Job Details* page for a particular job by selecting the job number as seen below:



Icons will be displayed under the job number (as in the image above):

- The first icon will bring you to the *Planned Schedules* view.
- The second icon will bring you to the *Quotes* view for this job.
- The third icon will bring you to the *Documents* page for this job.
- The fourth icon will bring you to the *Forms* page for this job.

- The fifth icon will bring you to the *Assets* list for this job.