

Works – (Add)

This article describes how to add a new Work's. From the Works you can create a "Charge Up Job" or "Quote", on acceptance the Quote becoming a "Quoted Job" and making the Labour available for Labour Bookings and the Product available for Orders.


To Add a new Works;

Adding new Works is done from the WORKS Tab Library

NOTE: To Add new Works, the Customer must be in the Contacts Library

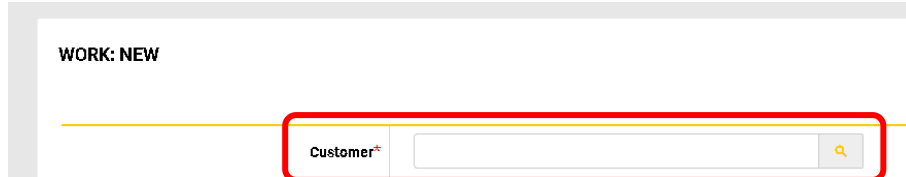
Quick Flow;

WORKS Tab > **[Add]** > **Customer*** > **Works Information** > **[Add]**

1. Press the **WORKS** Tab to display the WORKS Library, then Press the **[Add]** button  to display the WORK: NEW Window



2. From the WORK: NEW Window, Select a **Customer***



NOTE: Start Keying in the Customer's name to display options, then select from the options when the Customer displays

3. From the WORK: NEW Window, Enter/Check/Select the system populated **Works Information**, Enter a "Brief Description", any "Full Job Notes", "Customer Reference" (optional), "Job Address" and "Delivery Address for Orders" (if they haven't default auto populated), "Primary Contacts", "Pricing Rules" and "Default Brand"

4. Press the **[Add]** button  to add the new Works and return to the WORK: XXXX Window



5. From the WORK: XXXX Window you can;

- Add a Quote – See KAT-1702 (to start a Quote)
- Add a Labour Booking (to start a Charge Up Job) – See KAT-1206
- Create an Order (to start a Charge Up Job) – See KAT-1406 or KAT1408