



Eaco Job Templates (for Post a Job functionality)

USER GUIDE

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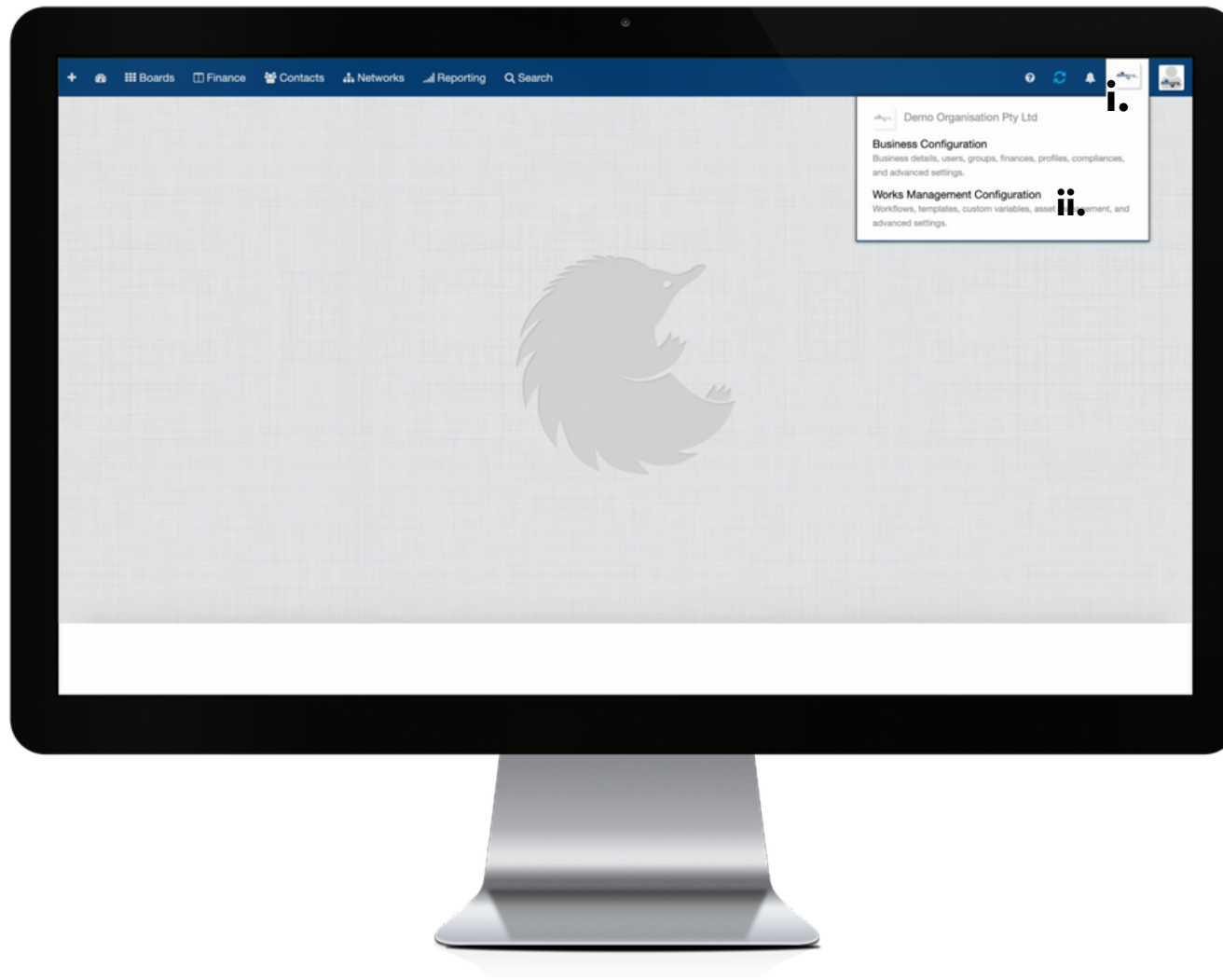
INDEX

User Instructions

- 1. Get Started.....3-4
- 2. WM Configuration.....5-6
- 3. Job Templates: Home Page7-9
- 4. Create a New/Edit a Job Template.....10-21

ESTABLISH, ACT,
COMMUNICATE AND
OPTIMISE

1. GET STARTED



In order to enable your Users to Create or Post a Job using the Eaco FieldWorker App or through Dispatch, you will need to establish the settings for your Job Templates feature via your organisation's Works Management Configuration (WM Configuration) section.

Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

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2. WM CONFIGURATION

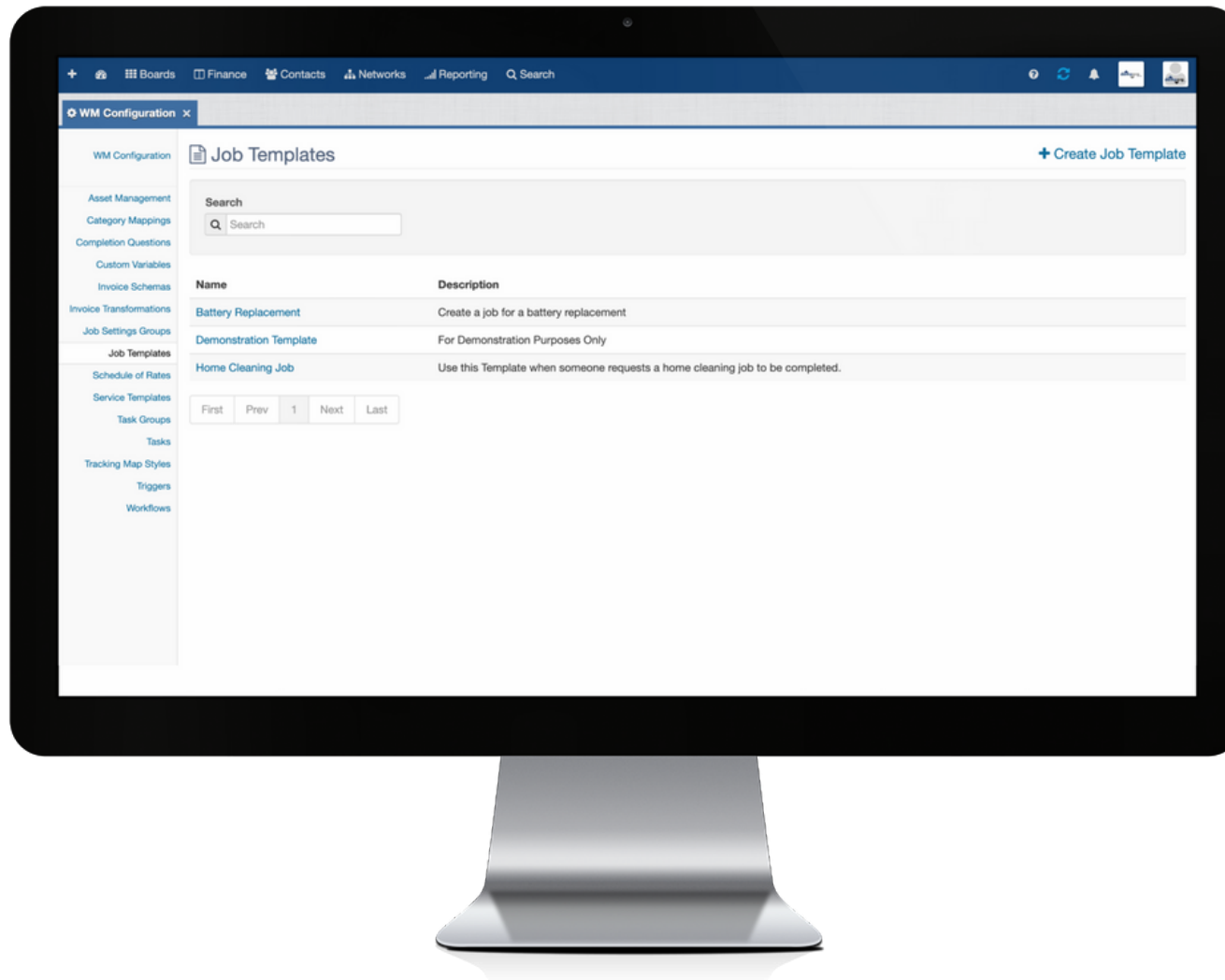




i: To commence establishing the settings for your Job Templates feature, click on Configure.

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3. JOB TEMPLATES: HOME PAGE



The Job Templates Home Page provides links to access all Job Templates that have been established for each type of "Post A Job" to be created in the Eaco FieldWorker App and/or through Dispatch.

Legend: main view of Job Templates Home Page

Name: the name of the Job Template, which is applied upon creation of the template.

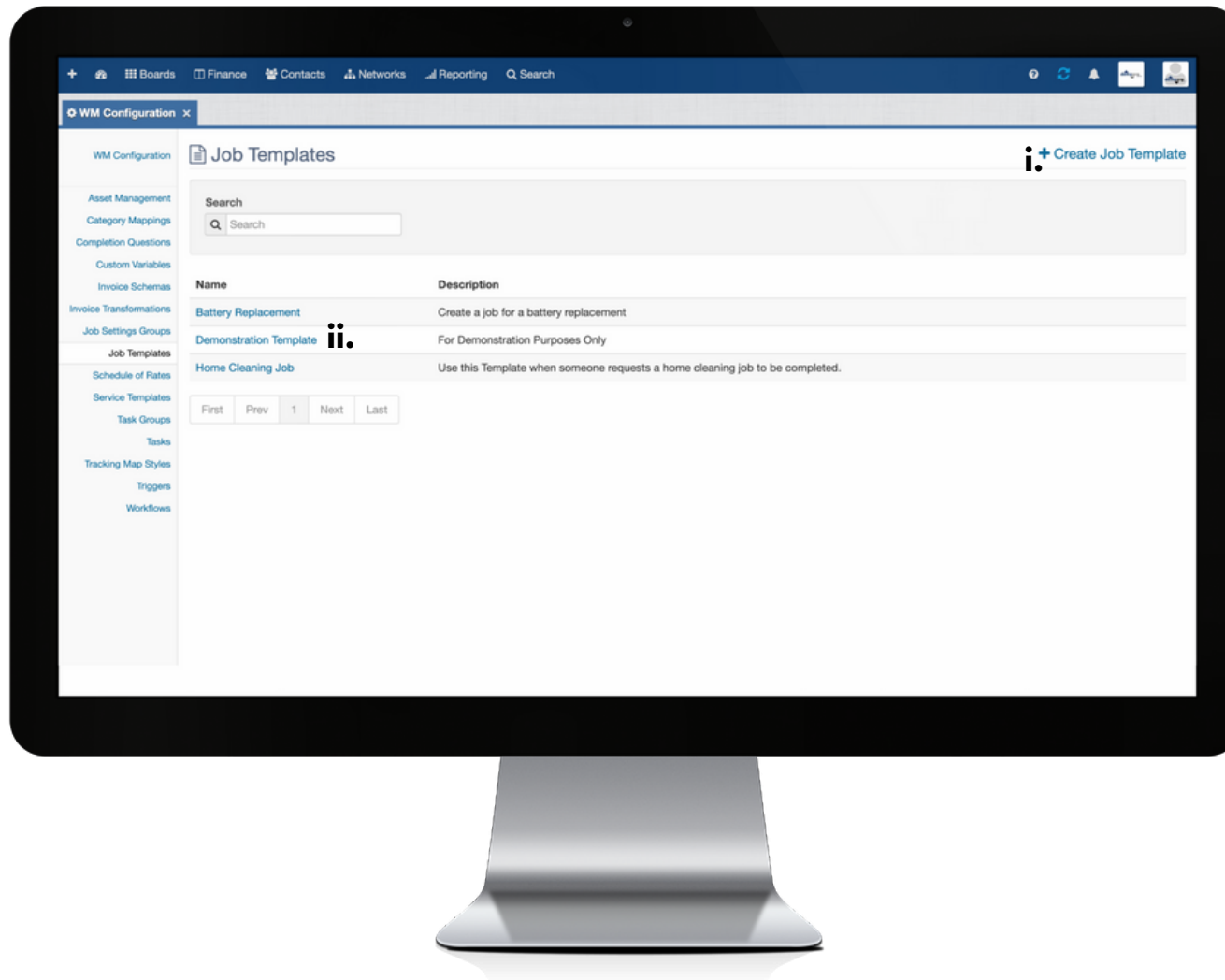
Description: a description of the purpose for the use of the Job Template, which is applied upon creation of the template.

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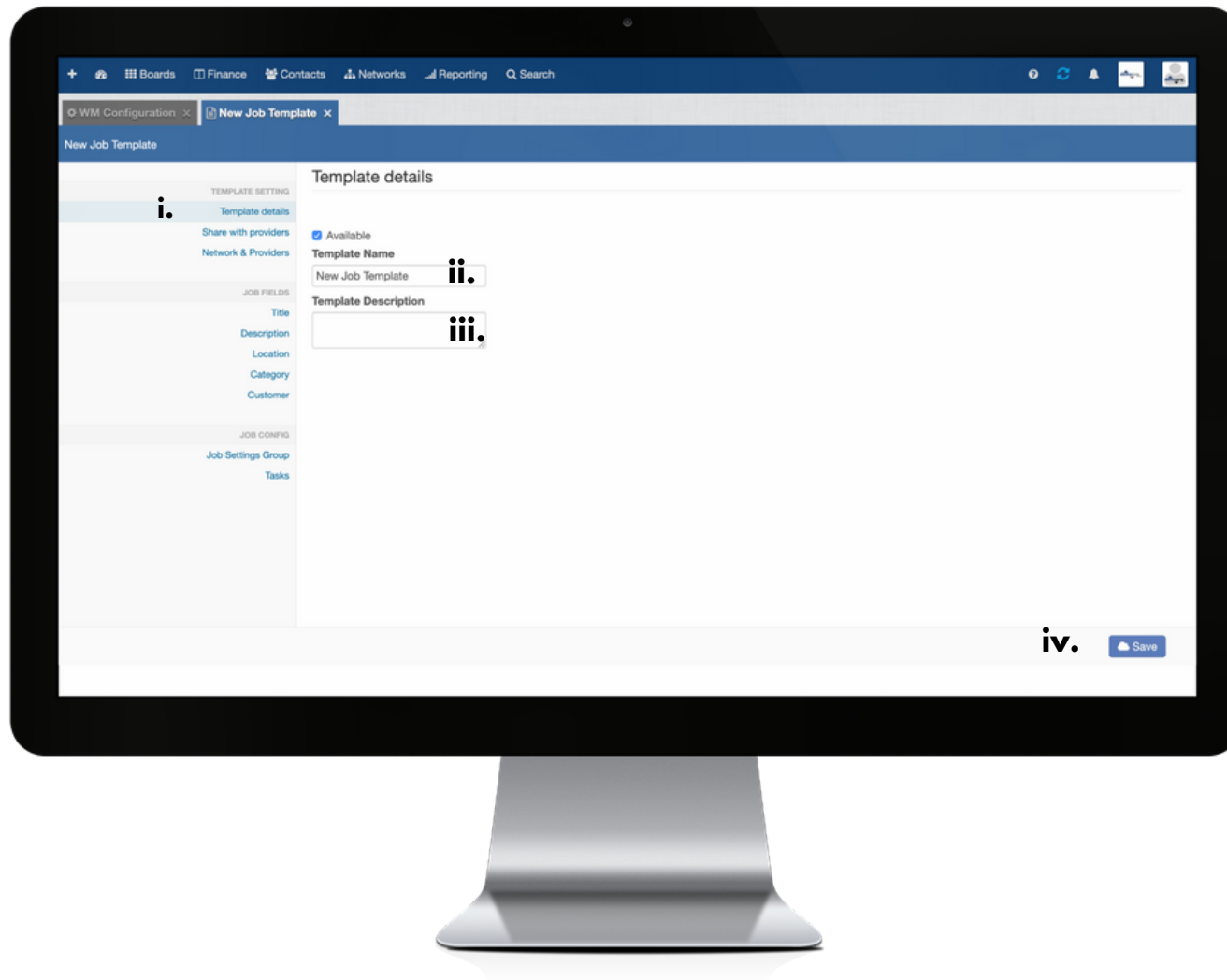


4. CREATE A NEW/EDIT A JOB TEMPLATE

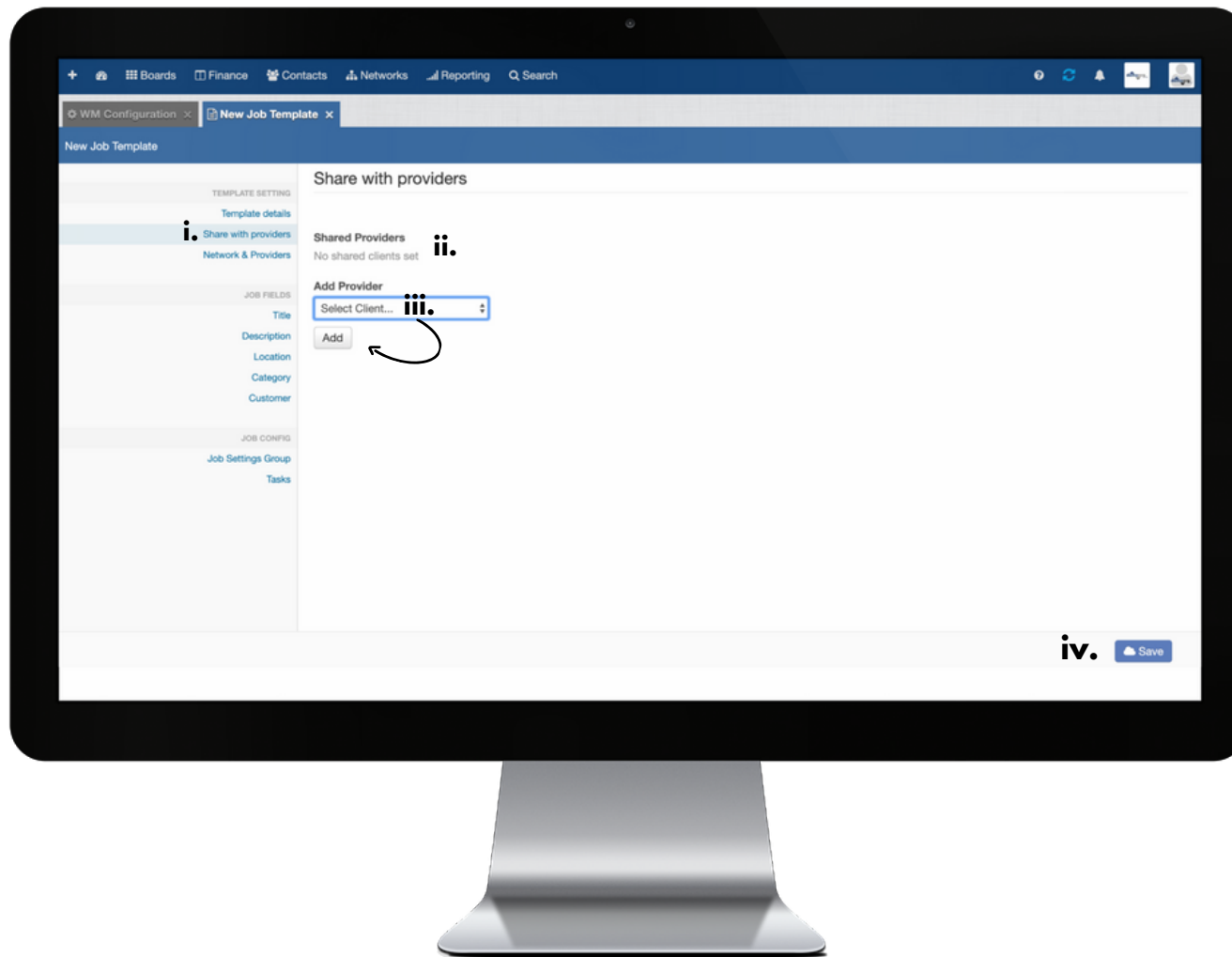




i: click the + icon to open the Create Job Template dialog box; or
ii: to edit the details of an existing Job Template, click the name to open the Job Template dialog box.



- i:** to commence the creation of a Job Template, work your way through the relevant settings in the left hand menu starting with the Template Details under the Template Settings section.
- ii:** enter the name of the Job Template to be created.
- iii:** complete this field to apply a description of the purpose for the use of the Job Template.
- iv:** to finalise completion of the Template Details, click Save then proceed to the next section listed in the left hand menu, Shared with Providers.

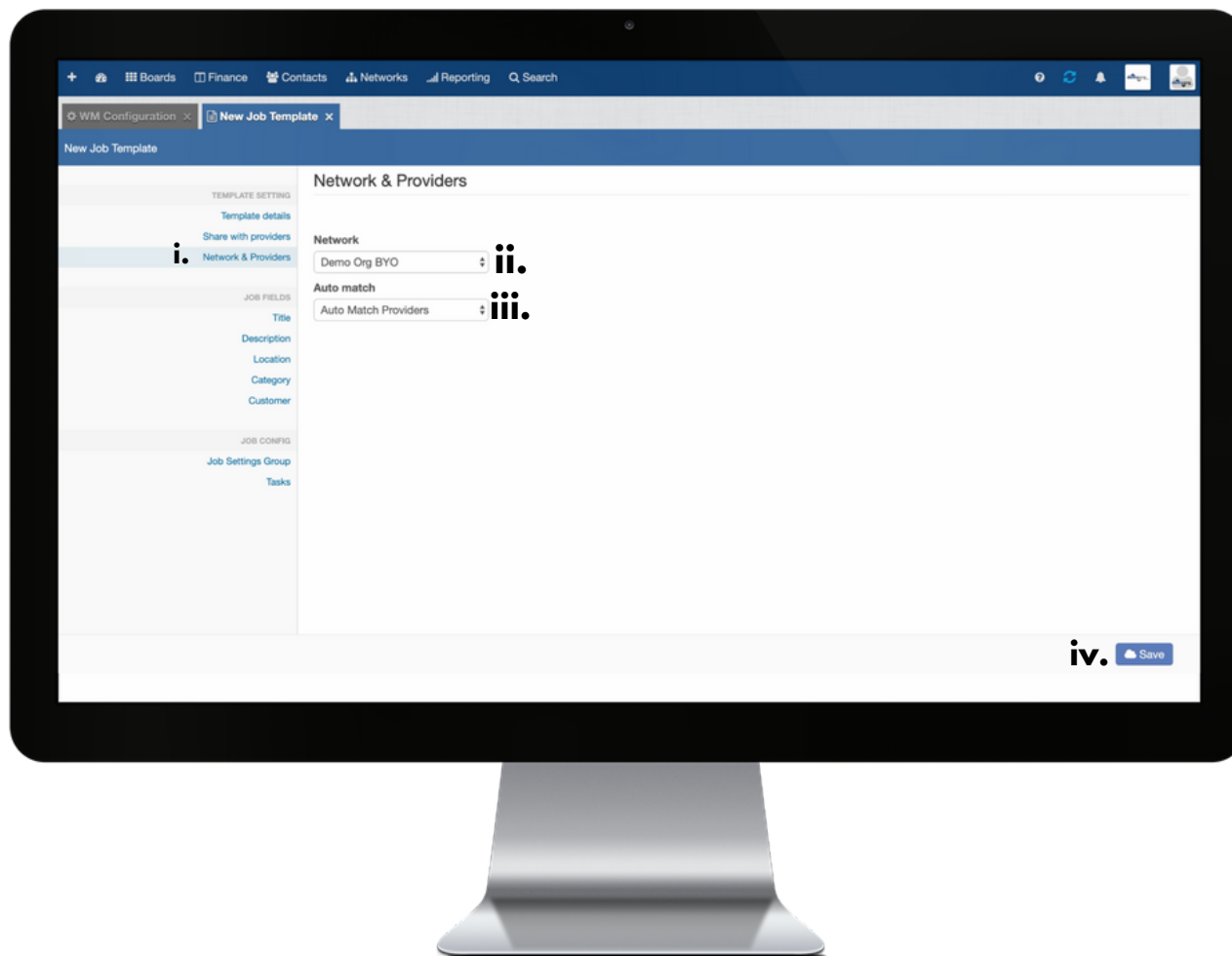


i: the Share with Providers setting of the Job Template enables you to set, which of your Service Providers, will be given access to use this template when Posting jobs in the Eaco FieldWorker App and/or through Dispatch.

ii: any Service Providers that have been granted use of this template will be listed here.

iii: to grant Service Providers permission to use the Job Template, select them via the drop down menu here and then click Add. Repeat this process to Add all Service Providers as necessary.

iv: to finalise completion of the Share with Providers settings, click Save then proceed to completing the next step, which is the Network & Providers details.

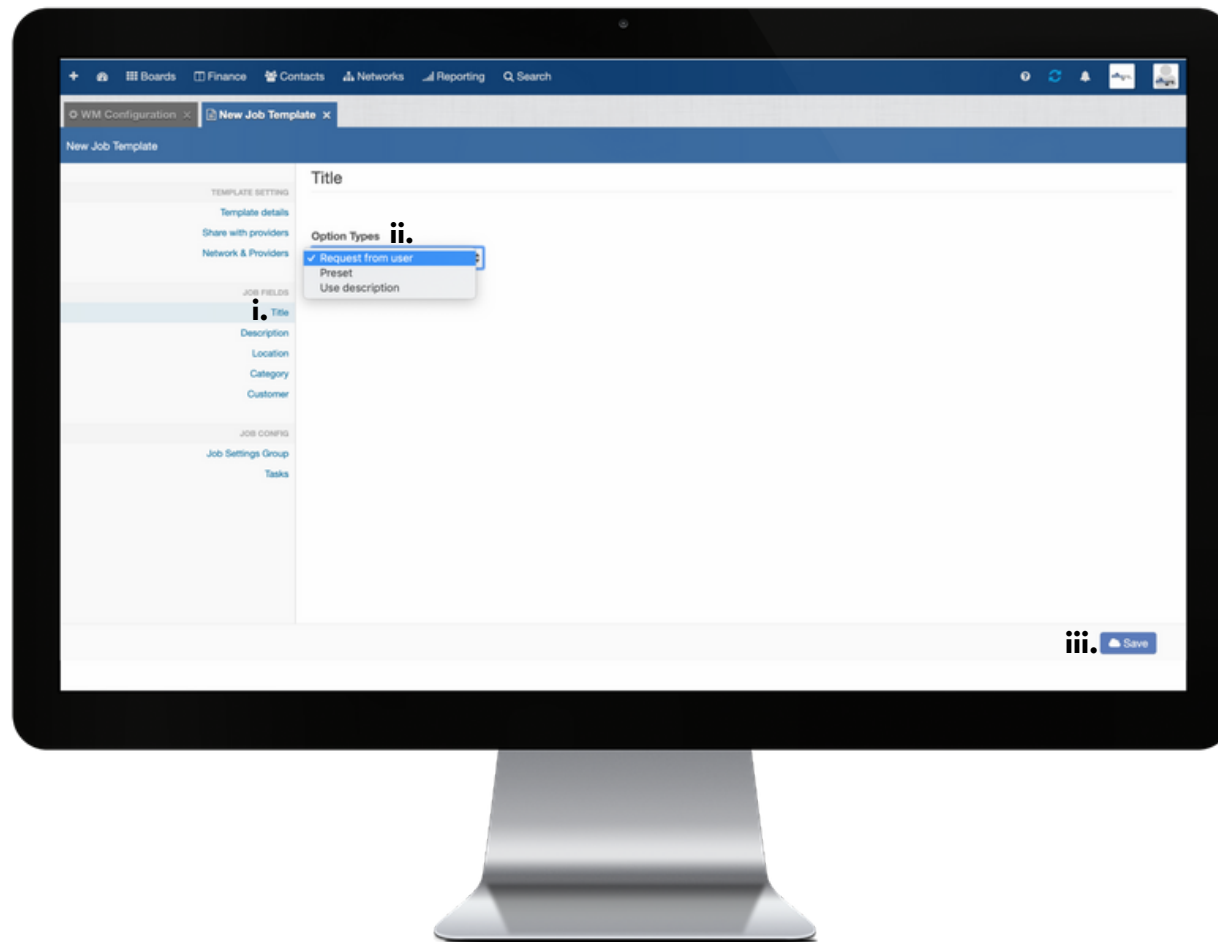


i: the Network & Providers setting of the Job Template enables you to set, which of your Service Provider Networks, will be given access to use this template when Posting jobs in the Eaco FieldWorker App and/or through Dispatch.

ii: use the drop down menu to select the applicable Service Provider Network to be granted use of the Job Template.

iii: use the drop down menu to select the Auto or Manual matching of the Service Provider Network to be granted use of the Job Template. **Auto-Match** = when the job is opened, providers will be matched by their profiles and those matched providers will be notified of the job. **Manually Match** Providers = when the job is opened, providers will not be matched by their profiles...in this instance, a user of the job owner will need to manually notify provider(s) for them to be notified of the job. **The Manually Match option must be selected if you are looking to permit a job to be created by a Supplier (that has an active profile on the jobs network) whereby that job will be released and assigned tp that Supplier (be sure to check the tick box that will appear once you have clicked to select the Manually Match Providers option.**

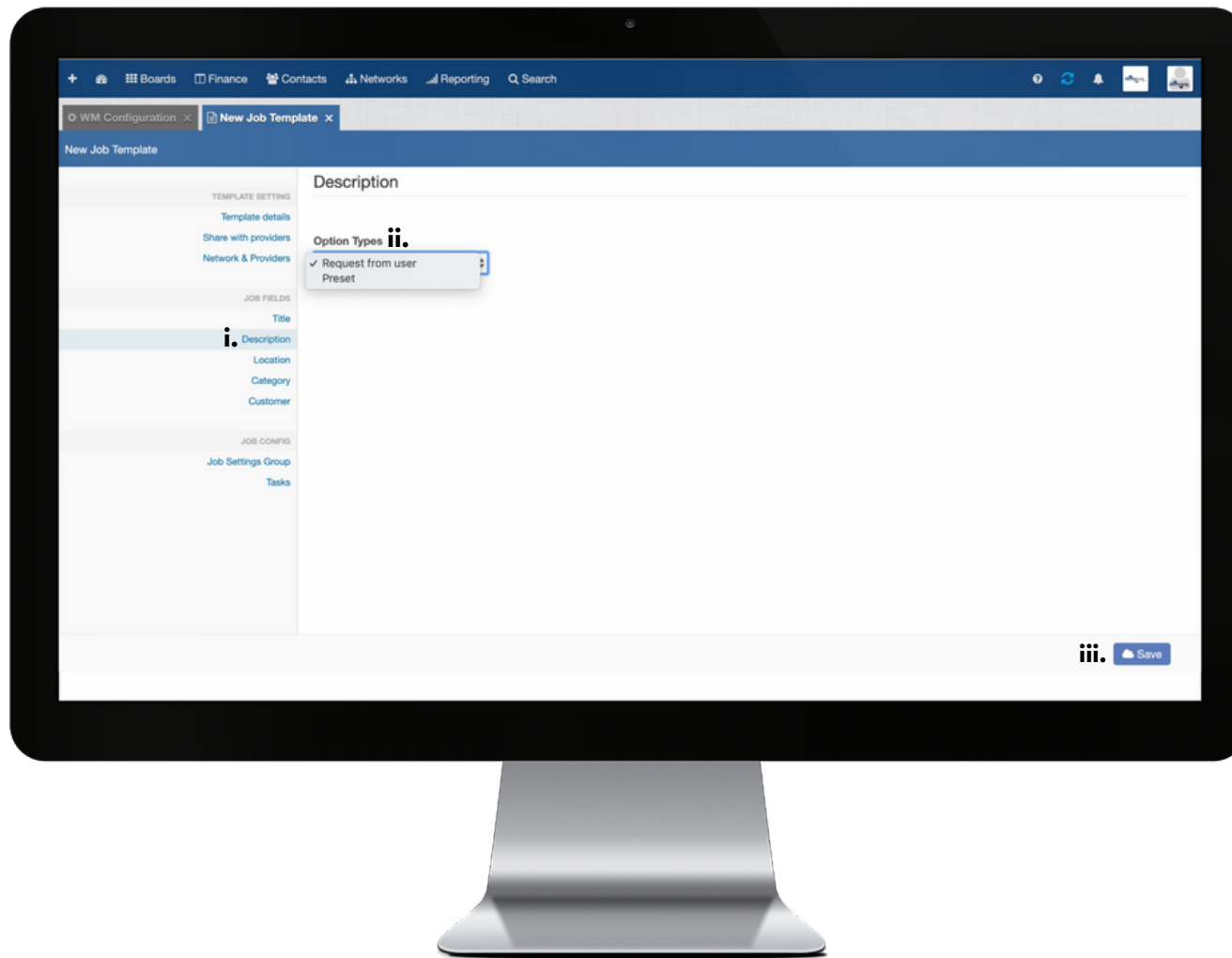
iv: to finalise completion of the Network & Providers settings, click Save then proceed to completing the next section, which is the Job Fields.



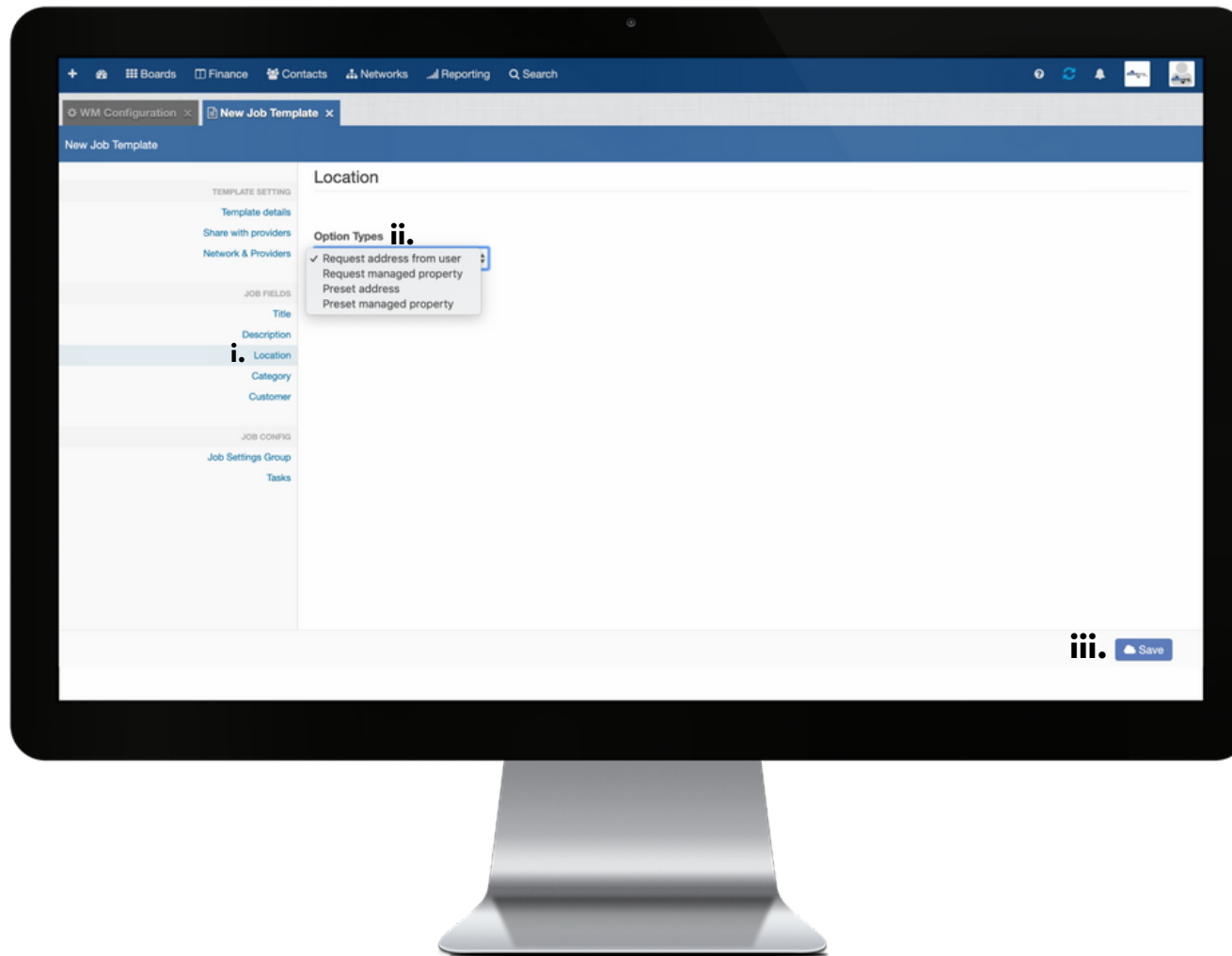
i: to set the Job Fields for the Job Template, work your way through the relevant sections in the left hand menu starting with the Title section.

ii: the Option Types drop down menu, will enable you to determine the Title format of the Job Template. The Title options can be one of either: **Request from User** (in this instance, the Title for the Job being created will be set by the User Posting the Job in the Eaco FieldWorker App or through Dispatch); **Preset** (this option will enable you to apply a preset name for the Job, which means the Title of the Job will be pre-filled when a User is Posting a Job); or **Use Description** (this setting, if applied, will capture a part of the Description if one has been pre-set or the User can enter a Description when Posting a Job in the Eaco FieldWorker App or through Dispatch).

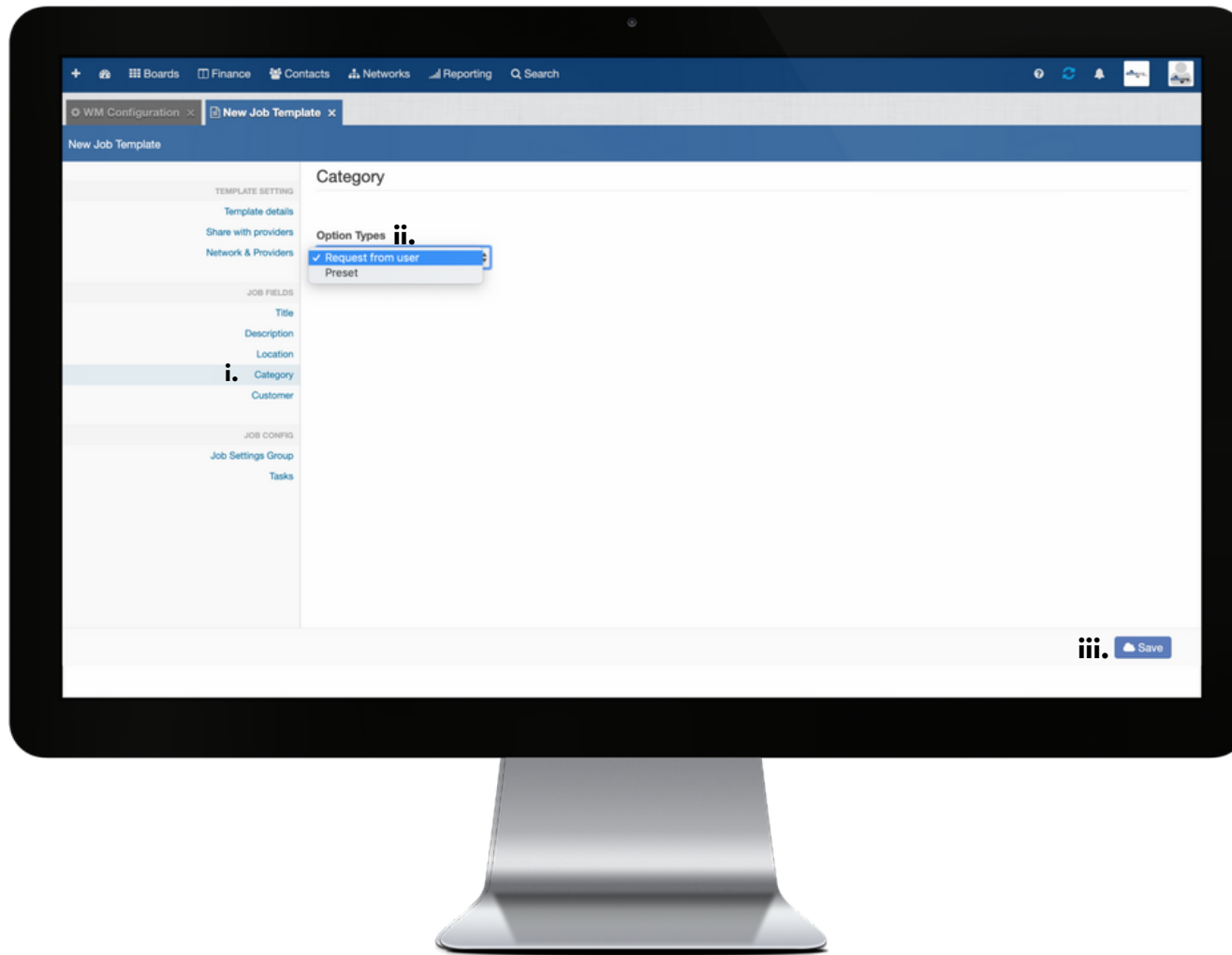
iii: once you have selected the Option Type, to finalise completion of the Title settings, click Save then proceed to the next Job Field setting listed in the left hand menu, Description.



- i: the Description setting of the Job Fields for the Job Template, will enable you to determine the basis in which the Description of the Job will be set when a User is Posting a Job in the Eaco FieldWorker App or through Dispatch.
- ii: the Option Types drop down menu will enable you to select whether the Description of the Job will come via **Request from User** (i.e. it will be set by the User Posting the job in the Eaco FieldWorker App or through Dispatch) or alternatively, you can apply the **Preset** option, which will pre-fill the Description when a User is Posting a Job in the Eaco FieldWorker App or through Dispatch).
- iii: once you have selected the Option Type, to finalise completion of the Description settings, click Save then proceed to the next Job Fields setting listed in the left hand menu, Location.



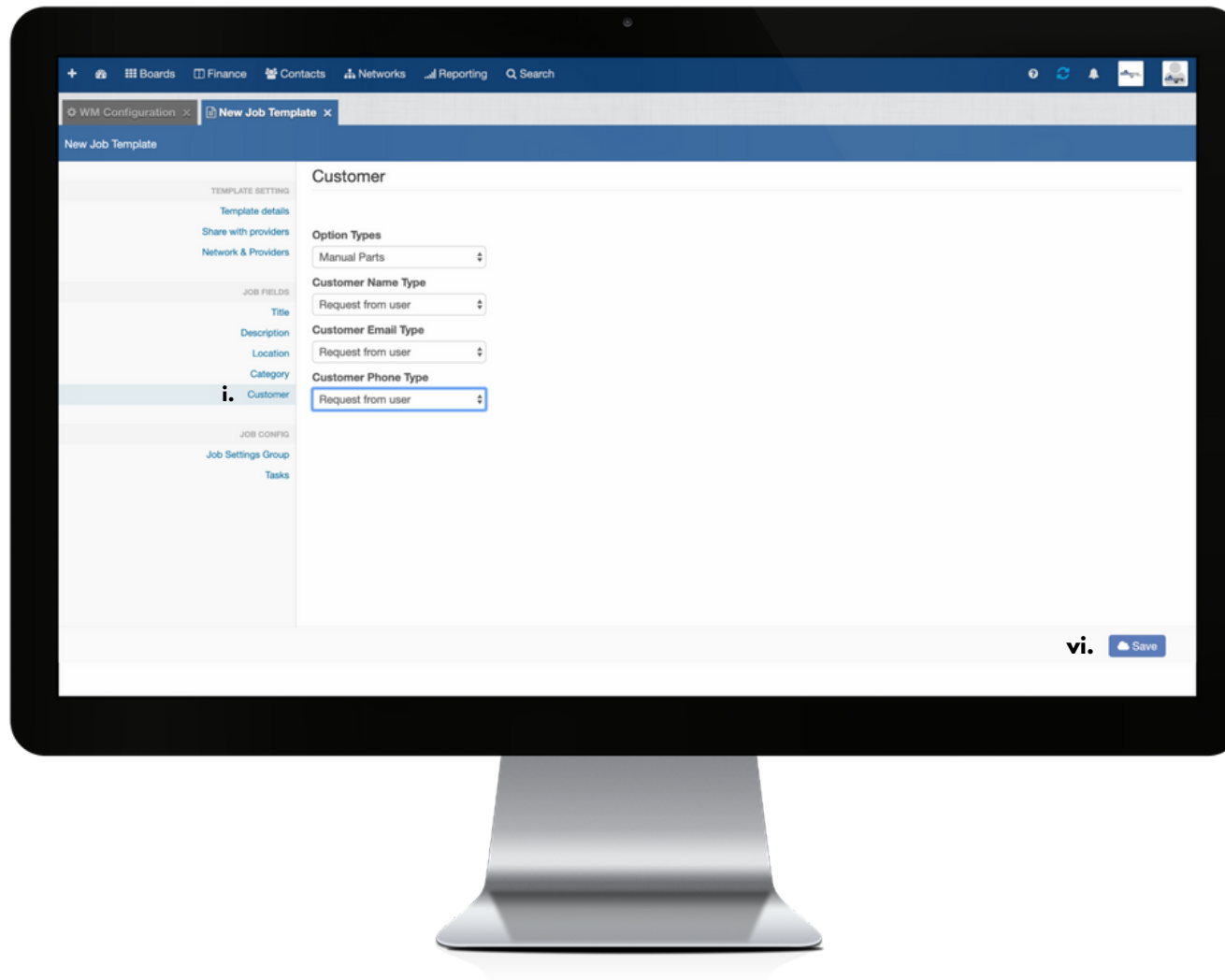
- i: the Location setting of the Job Fields for the Job Template, will enable you to determine the basis in which the Location of the Job will be set when a User is Posting a Job in the Eaco FieldWorker App or through Dispatch.
- ii: the Option Types drop down menu will enable you to select whether the Location will be set via **Request Address from User** or **Request Managed Property** (i.e. the User will set this when Posting the job in the Eaco FieldWorker App or through Dispatch); or alternatively, you can apply the **Preset** option (**preset Address or preset Managed Property**), which will pre-fill the Location when a User is Posting a Job in the Eaco FieldWorker App or through Dispatch.
- iii: once you have selected the Option Type, to finalise completion of the Location settings, click Save then proceed to the next Job Fields setting listed in the left hand menu, Category.



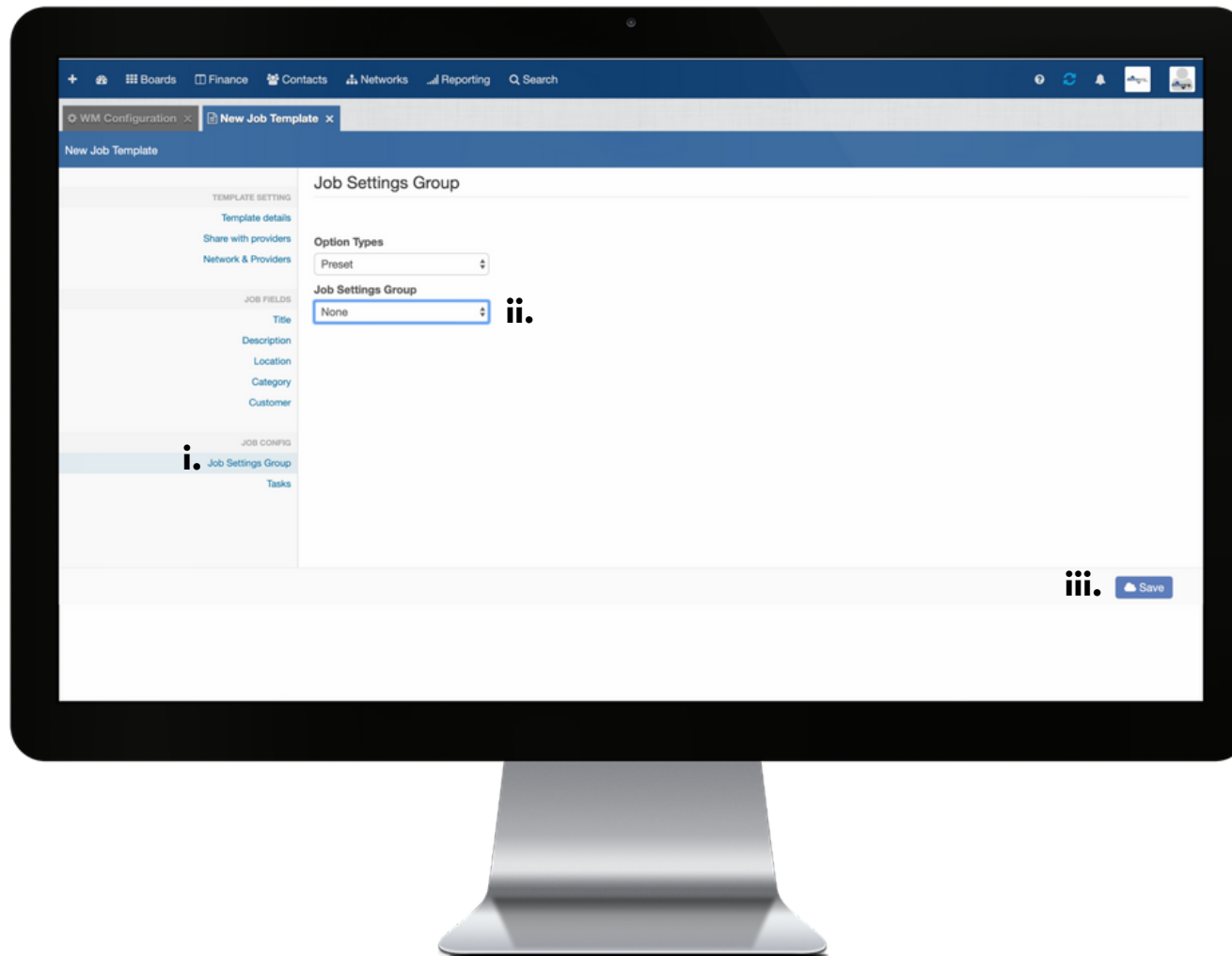
i: the Category setting of the Job Fields for the Job Template, relates to setting the applicable Category of the Job to be Posted by a User in the Eaco FieldWorker App or through Dispatch.

ii: the Option Types drop down menu will enable you to select whether the Category of the Job to be Posted will be set via **Request from User** (i.e. the User will set the applicable Category when Posting the job in the Eaco FieldWorker App or through Dispatch); or alternatively, you can attach a **Preset** Category, which will pre-fill the Category when a User is Posting a Job in the Eaco FieldWorker App or through Dispatch (upon selecting the Preset Option Type, you will be prompted to select a Category from a drop down menu).

iii: once you have set the Option Type, to finalise completion of the Category settings, click Save then proceed to the next Job Fields setting listed in the left hand menu, Customer.



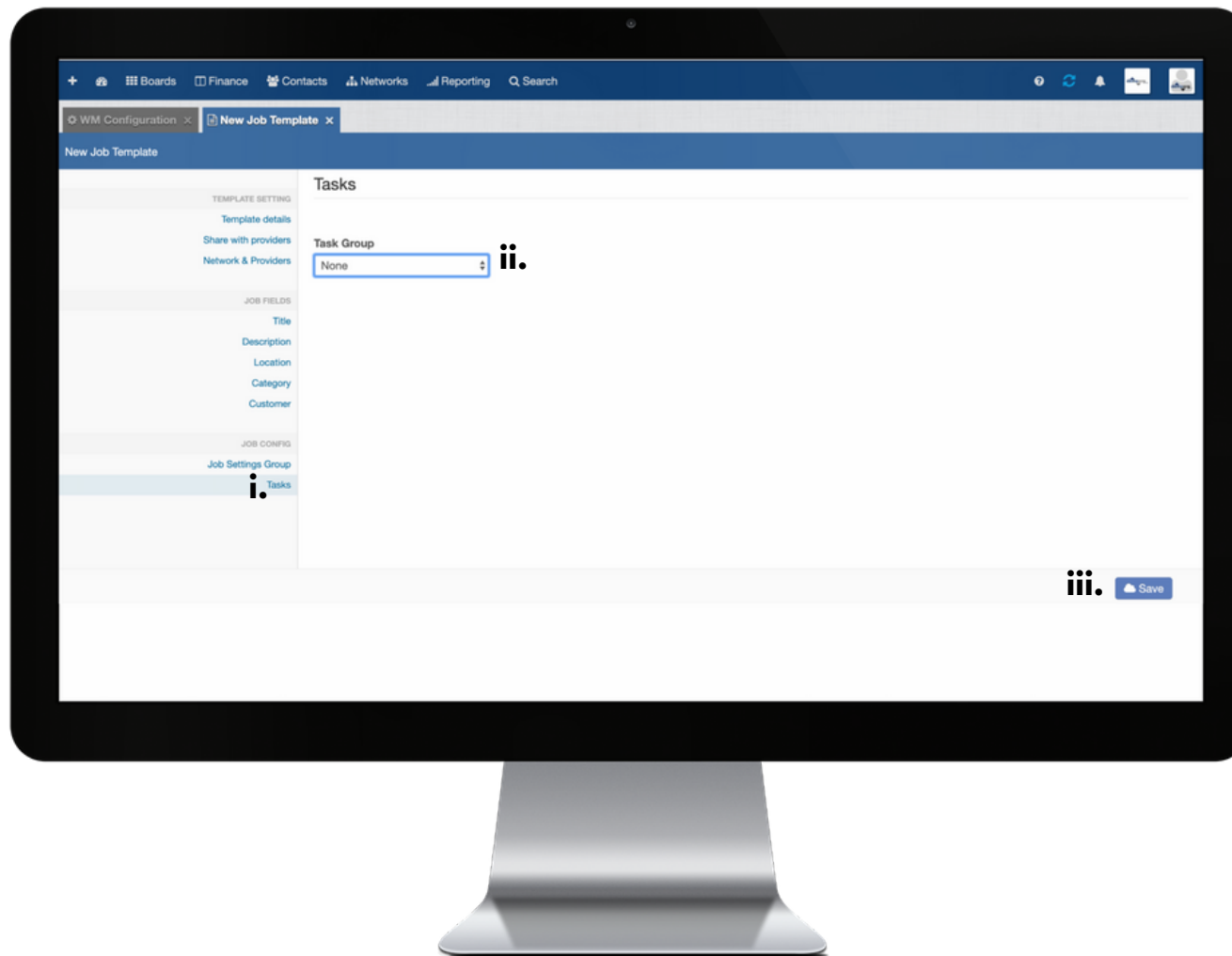
i: the Customer setting of the Job Fields for the Job Template, relates to establishing the settings of recording Customer details when the Job Template is used for Posting of Jobs in the Eaco FieldWorker App or through Dispatch.



i: to attach Job Settings to the Job Template, click on Job Settings Group in the left hand menu - this will enable you to specify which of your previously created Job Settings Groups should be attached to this Job Template.

ii: the Job Settings Group Option Types will be a Preset field in the Job Template and so it is important that you select the Job Settings Group Template that is to be attached for use when Posting a Job using this Job Template. Use the drop down menu here to select the applicable Job Settings Group.

iii: click Save to finalise attachment of the Job Settings Group.



i: to attach a Task Group to the Job Template, click on Tasks in the left hand menu - this will enable you to specify which of your previously created Task Groups should be attached to this Job Template.

ii: Use the drop down menu here to select the applicable Task Group.

iii: click Save to finalise attachment of the Task Group.