

How to put a job on hold

Purpose: To hold the job until it can be returned to the workflow

Role: Technician/Administration Assistant

Department: Operations/Admin

Resources: ServiceM8

Frequency: As required

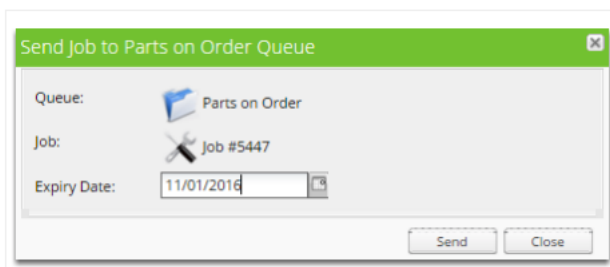
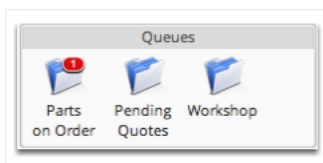
In ServiceM8, job queues will help you manage on-hold jobs.

Think of queues like folders on your desk. Jobs can be placed into a queue while they are waiting for something to happen (waiting on a part, waiting on a client, waiting on a site to be ready). Jobs that are placed in queues disappear from your standard job lists (Unscheduled jobs, In Progress, etc) to reduce day to day clutter.

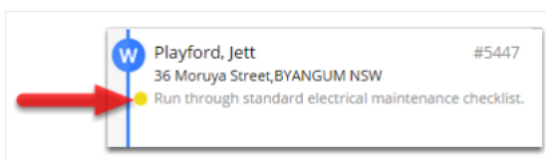
<https://support.servicem8.com/hc/en-us/articles/203446690-How-can-I-manage-jobs-on-hold->

1 Drag the job to the queue icon

To put a job into a queue, simply drag the job onto the appropriate queue icon. When you put jobs into a queue, you need to set an expiry date. When a job expires from a queue the job will automatically pop back out of the queue and onto your Unscheduled Jobs tab again.



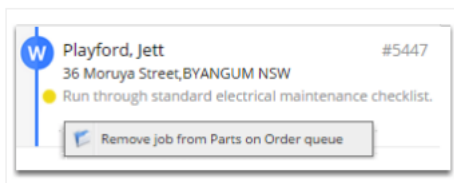
Any jobs that have been placed into a queue will have a yellow dot, and if you move your mouse over the yellow dot you can get more information about the queue and when it the job will expire from it. At any time jobs can be moved to a different queue by dragging them to an alternate queue. For example a job was waiting for client, but is now waiting for parts.



2 Removing a job from a queue

How do I remove a job from a queue?

If you would like to remove a job from its current queue without putting it in a new queue, simply right-click on the job in the job list and select remove from queue from the menu.

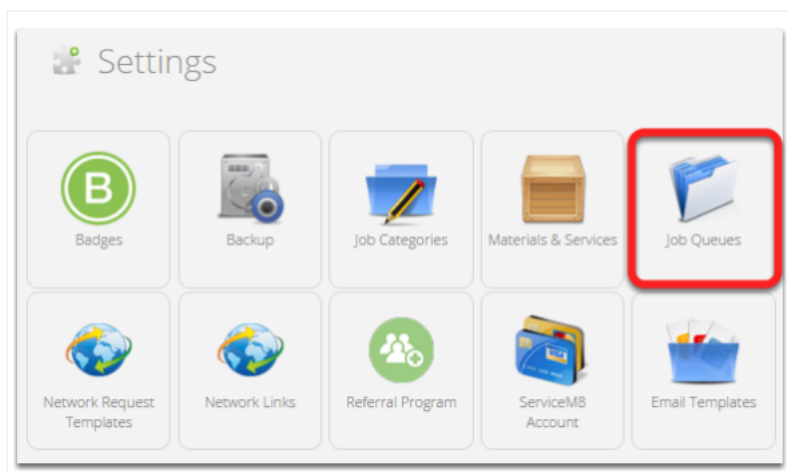


3 Creating your own queues

Can I create my own queues?

Yes you can, the three queues are samples provided to help get you started, you can add/remove queues to better suit your business, you can also set the default time a job should stay in a queue before expiring – to save you having to pick a date 6 months in advance every time you drop a job in a queue.

To modify your queues, go to the Settings menu, and click the Job Queues option.



Files

Comments