

Job Tracker Professional

Linking a Job and Quote



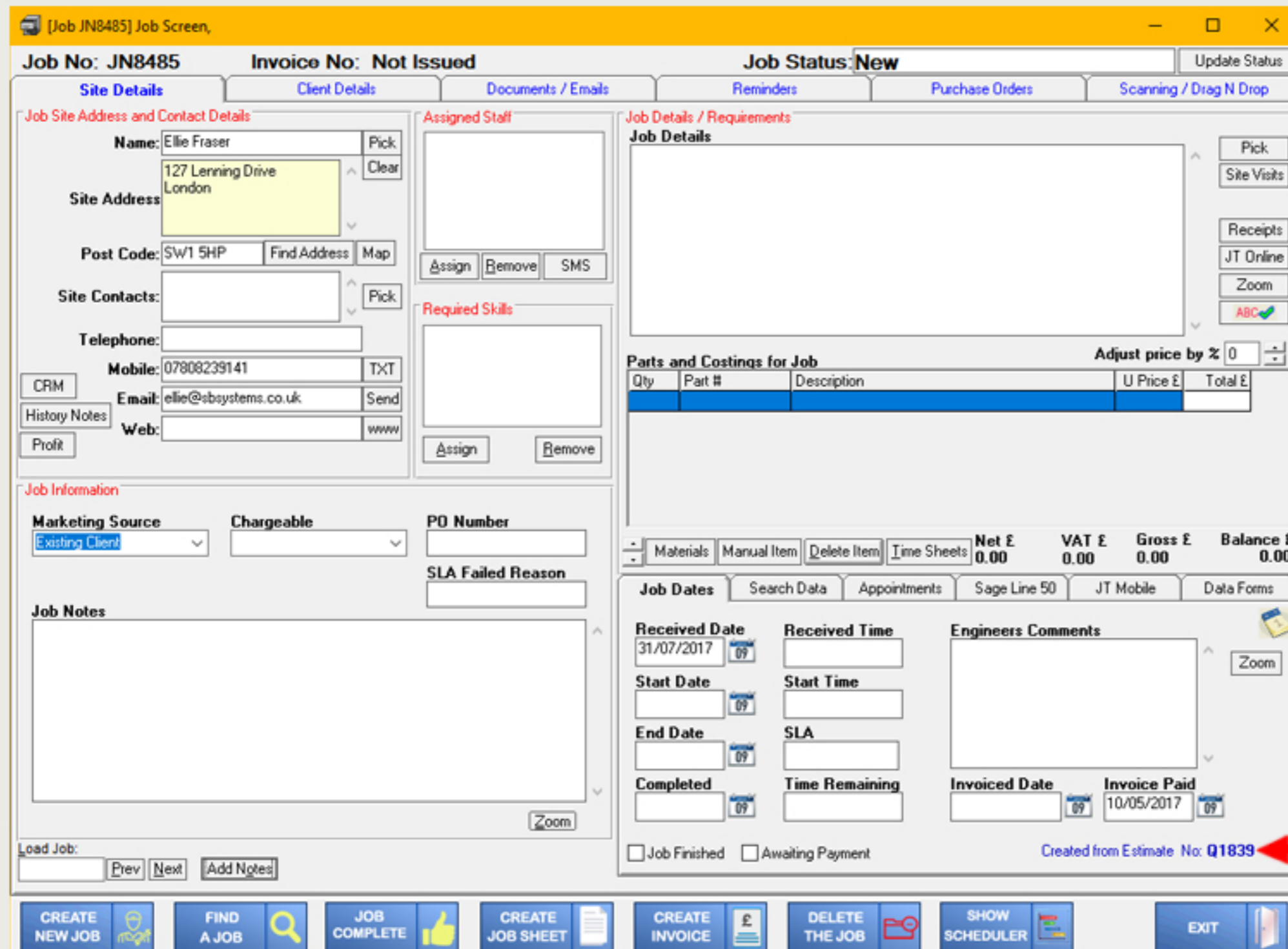
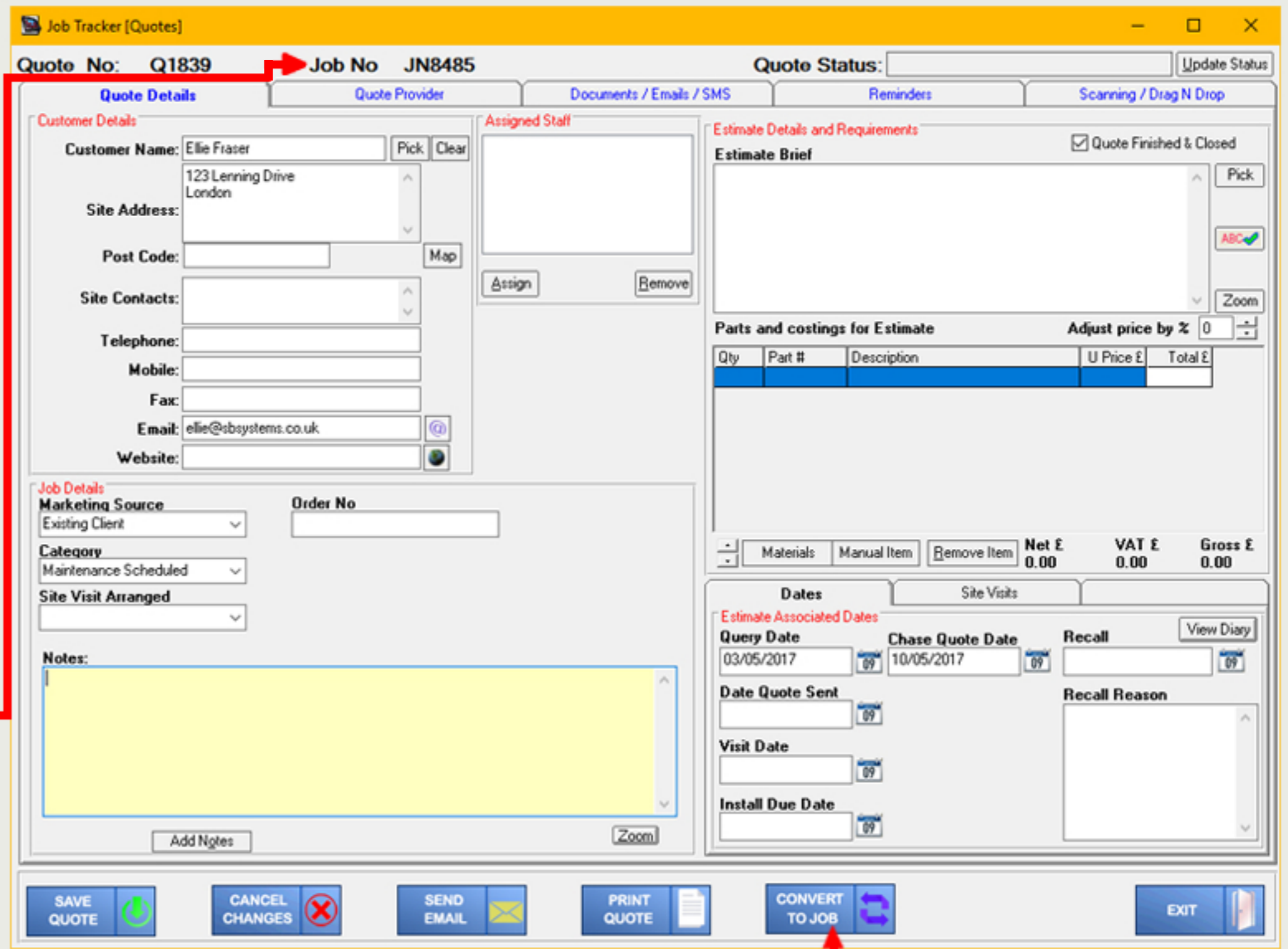
On Job Tracker Professional, you are able to create a Job from a Quote. This will link the two together and allow you to access the Job/Quote from the corresponding screen.

Open Job Tracker Professional.

Click on 'Quotes'.

To create a Job from a Quote, within the Quote screen click the 'Convert to Job' button at the bottom of the screen.

By doing this you will link the Quote with a new corresponding Job. To quickly access the Job from the Quotes screen, right click on the Job Number which will now be displayed at the top of the screen



Within the Job, the Quote number of the original Quote that it relates to will be displayed in the bottom right of the screen. You will only need to double click on the Quote Number in order to quickly access the Quote from the Job.

