

## Creating a New Job

- Click Estimating
- Select Create New Job
- Insert customer short name (up to six characters of customer surname or company name)

Instructed By	<input type="text" value="O"/>
Estimated For	<input type="text" value="O"/> / <input type="text" value="MARSHA"/> / <input type="text"/>
<input type="text"/>	

- Select the relevant account by double clicking on it or click the door to create a new account.
- If you have chosen to create a new account, enter the customer details and click the tick twice to save the details and return to the job creation screen.

Short Name	<input type="text" value="MARSHA"/>	Account Code	<input type="text" value="~JANM"/>
Account Type	<input type="text" value="C"/>	Factor Code	<input type="text"/>
First Name	<input type="text"/>		<input type="text"/>
Account Name	<input type="text" value="Miss J Marshall"/>		
Address	<input type="text" value="23 Avenue Road"/>		
	<input type="text" value="Dartford"/>		
	<input type="text" value="Kent"/>		
Post Code	<input type="text" value="DA2 3RT"/>		
CAPS Code	<input type="text" value="&lt;NONE&gt;"/>	TP Key	<input type="text"/>
Contact Name	<input type="text"/>		
Telephone Nr	<input type="text" value="01322 305405"/>		
Tel / App. Nr	<input type="text" value="07515 323444"/>		
Fax Nr	<input type="text"/>		
SMS Text Nr	<input type="text" value="07515323444"/>		
Vat Reg	<input type="text" value="0.00"/>	Due Date	<input type="text" value="A"/>
Days1	<input type="text" value="0"/>	/	Discount % <input type="text" value="00.00"/>
Days2	<input type="text" value="0"/>	/	Discount % <input type="text" value="00.00"/>
Report Codes	<input type="text"/>	<input type="text"/>	<input type="text"/>

- If insured, specify an insurance company

Insured	<input type="text" value="Y"/>	/	<input type="text" value="NORW"/>	/	<input type="text"/>
<input type="text"/>					

- Double click on the required insurance company to select it, or click the door to exit from the list and create a new insurance company.

- If you have chosen to create a new insurance company, enter the address details and click the tick twice to save and return to the Job Creation screen.
- Enter any Policy, Claim or order number as required.

Policy Nr	363648
Claim Nr	363648/2
Order Nr	P/O 3298

- Enter the vehicle registration number

Vehicle Reg	RJ02OUH
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- If the vehicle already exists, double click on it to select. Alternatively create new vehicle details.
- Complete the vehicle details as fully as possible.


Vehicle Registration	RJ02OUH	Last Amended	21/03/2007
Vehicle Type	M	Last Used	21/03/2007
Manufacturer	FORD		
Model	MONDEO		
Month/Year Manuf'ed	3 / 2002		
Colour	MET BLUE		
V.I.N. Or Nr	CHASSIS NUMBER		
Trim Code			
Engine	1.9TDI		
Transmission	MANUAL		
Plate Or Serial Nr			
Tyre Depths (mm)	NSF 4 OSF 4 NSR 4 OSR 4 SPARE 6		
User Field 1			
User Field 2			

- Click the tick twice to save the vehicle details and return to the Job Creation screen.
- Complete the remaining details as necessary

Instructed By	<input type="text" value="O"/>	Recovered / Date	<input type="text" value="N"/> / <input type="text"/>
Estimated For	<input type="text" value="O"/> / <input type="text" value="SMITH"/> / <input type="text" value="A12152"/>	Free Days Storage	<input type="text" value="999"/>
<input type="text" value="Mr Richard Smith 23 Avenue Road"/>		Car Required/Reg	<input type="text" value="Y"/> <input type="text" value="T.B.A."/>
Drivers Name	<input type="text"/>	From	<input type="text"/> To <input type="text"/>
Contact Name	<input type="text"/>	On Site	<input type="text" value="N"/> <input type="text" value="Ok To Proceed"/> <input type="text" value="N"/>
Contact Tele	<input type="text" value="01322 334345"/>	Insp'n Req'd / Date	<input type="text" value="Y"/> / <input type="text" value="21/03/2007"/>
Insured	<input type="text" value="Y"/> / <input type="text" value="NORWIC"/> / <input type="text" value="A00038"/>	Authorised Date	<input type="text"/>
<input type="text" value="NORWICH UNION INSURANCE REPAIRER PAYMENT"/>		Engineer Ref	<input type="text"/>
Approved Rep	<input type="text" value="N"/>	Collection Ref	<input type="text"/>
Policy Nr	<input type="text" value="363648"/>	Booked In Date	<input type="text" value="21/03/2007"/> <input type="text" value="08:00"/>
Claim Nr	<input type="text" value="363648/2"/>	Due Out Date	<input type="text" value="24/03/2007"/> <input type="text" value="17:00"/>
Order Nr	<input type="text" value="P/O 3298"/>	Actual Ret. Date	<input type="text"/>
Vehicle Reg	<input type="text" value="RJ020UH"/>	Other Work Req'd	<input type="text" value="N"/> <input type="text"/>
<input type="text" value="FORD MONDEO"/>		Estimated By	<input type="text"/>
Vehicle Miles	<input type="text" value="113843"/> <input type="text" value="Key Tag"/> <input type="text" value="12"/>	T/P Nr	<input type="text"/>
Web	<input type="text"/>		
Notes	<input type="text"/>		



- Enter the required estimator code or click the magnifying glass to display a list of available codes. Double click the required estimating code to select.
- If the job is going to be linked to a third party estimating system such as Audatex or Glassmatix, enter the Assessment number here if applicable. An asterisk may be entered to use the same number as the BMS job number (Audatex only).




- If the job is insured and has an applicable excess click , enter the customer excess and click the tick to save.

### Insureds Details

VAT %Age Liability	<input type="text" value="0.00"/>
Excess	<input type="text" value="150.00"/>
Betterment	<input type="text" value="0.00"/>
Vat Code	<input type="text" value="1"/>
<input type="text"/>	



- Enter the Job Source Analysis Code by clicking . Enter a job source code or click the magnifying glass to display available codes. Double click on the required job source to select.

Job Source & Analysis

AXAI	AXA INSURANCE

- Click the tick to save the Job Source Code.
- Click the tick three times to save the job.
- Make a note of the job number and answer No to exit without loading the estimate details or Yes to continue with an opinion estimate.