
Properties Pane: Job Tab

The *Job Tab* contains fields used to record the basic administrative information required for managing a job, such as job location, customer information, billing information, and so on. In addition to providing useful information while you are working within SmartBuild, the data in these fields can be included in any of your custom outputs. The contents of the *Job Tab* are completely customizable, and differ widely by organization. The fields described here are provided by default in SmartBuild, right “out of the box.”

- **Job Number** – Enter a unique internal reference number that your organization will use to track this job throughout its entire lifecycle. The `Job Number` may or may not be identical to the invoice number used for billing purposes, at your company’s discretion.
- **Job Name** – Enter a name into this field for each new job. The most effective and efficient method is to develop and implement a naming convention for `Job Names` that is used company wide. It will make it much easier to locate jobs on the SmartBuild *Jobs List* if everyone follows the same naming convention. The `Job Name` cannot exceed 16 characters in length, including spaces and underscores. Although it is not required, it is highly recommended that you make each `Job Name` unique. Please do not use any of the following special characters: ! @ # \$ % ^ & * as they may interfere with the proper performance of SmartBuild.
- **Address** – Enter the complete street address where the target building is or will be located.
- **City** – Enter the city in which the target building is or will be located.
- **State** – Enter the State or Province in which the target building is or will be located.
- **Zip Code** – Enter the American Zip Code or Canadian Postal Code where the target building is or will be located..
- **Requested Start** – Enter the date on which the customer has requested construction to begin. This date is entered manually.
- **Requested End** – Enter the date on which the customer has requested construction to end. This date is entered manually.
- **Billing Address 1** – Enter the first line of the customer’s billing address, if different from the address of the target building.
- **Billing Address 2** – Enter the second line of the customer’s billing address, if different from the address of the target building. (e.g. Bldg. #)
- **Billing City** – Enter the city to which the customer’s bill is to be sent.

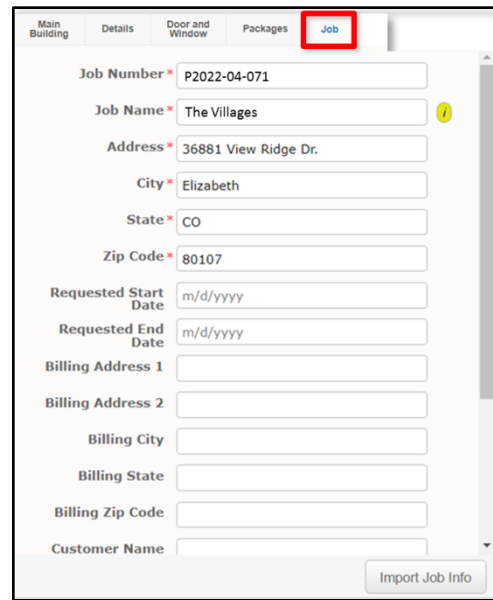


Figure 1: The Job Tab in the Properties Pane.

- **Billing State** – Enter the state or province to which the customer’s bill is to be sent.
- **Billing Zip Code** – Enter the Zip Code or Postal Code to which the customer’s bill is to be sent.
- **Customer Name** – Enter the full name of the person responsible for paying for this job. (E.g. Mr. John Smith, Ms. Jane Doe.)
- **Customer Phone** – Enter the primary phone number of the person responsible for paying for this job.
- **Customer Email** – Enter the primary email address of the person responsible for paying for this job.
- **Salesperson Name** – Enter the name of the primary salesperson responsible for this job.
- **Salesperson Phone** – Enter the phone number of the primary salesperson responsible for this job.
- **Salesperson Email** – Enter the email address of the primary salesperson responsible for this job.