Working with the Job Properties Tab

The *Job Tab* contains fields used to document the basic background information used 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 Roofing Passport, 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 Roofing Passport, right "out of the box."

- **Job Number** – Enter a <u>unique</u> internal reference number that your organization will use to track this job throughout its entire lifecycle. The `Job Number` may be identical to the invoice number your organization uses for billing purposes, but it is not required.

- **Job Name** – This is the name for a job, exactly as it was entered into Roofing Passport at the time a quote was requested. 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. This will make it easier for you to quickly distinguish between the jobs on your `Jobs List`. Please do not use any of the following special characters: ! @ # $ % ^ & * as they may interfere with the proper performance of Roofing Passport.
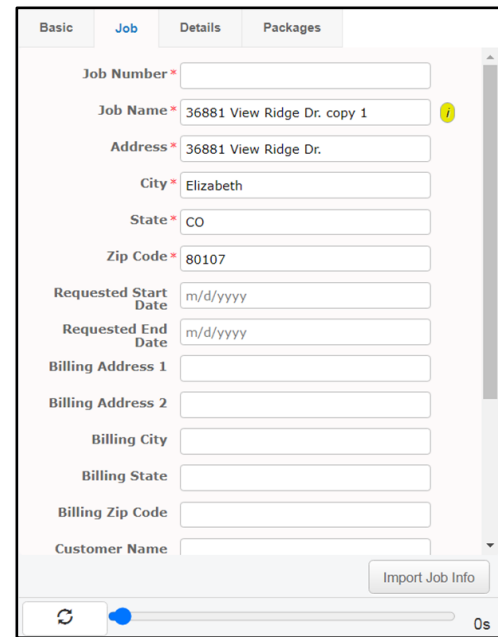

Figure 1: The Job Tab in the Properties Pane.

- **Address** – The complete street address of the target building, as it was entered into Roofing Passport at the time a quote was requested.

- **City** – The city in which the target building is located, as it was entered into Roofing Passport at the time a quote was requested.

- **State** – The State or Province in which the target building is located, as it was entered into Roofing Passport at the time a quote was requested.

- **Zip Code** – The American Zip Code or Canadian Postal Code of the target building, as it was entered into Roofing Passport at the time a quote was requested.

- **Requested Start** – Enter the date on which the customer has requested for construction to begin.

- **Requested End** – Enter the date on which the customer has requested for construction to end, this date is manually entered.

- **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 bills are to be sent.

- **Billing State** – Enter the state or province to which the customer's bills are to be sent.

- **Billing Zip Code** – Enter the Zip Code or Postal Code to which the customer's bills are to be sent.

- **Customer Name** – Enter the full name of the person responsible for paying for this re-roofing job. (E.g. Mr. John Smith, Ms. Jane Doe.)

- **Customer Phone** – Enter the primary phone number of the person responsible for paying for this re-roofing job.

- **Customer Email** – Enter the primary email address of the person responsible for paying for this re-roofing 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.