

Job Client Categories User Guide

Introduction

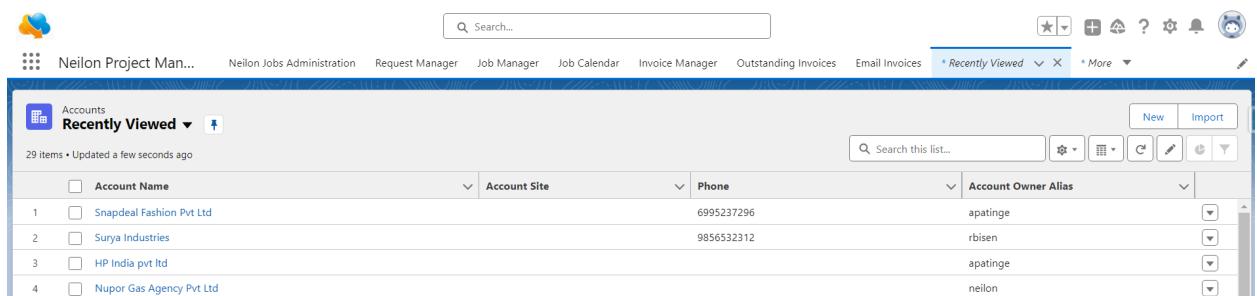
We have a feature in which you can categorize the customer's job using the categories provided by the customer. In this guide, we will see how you can create job client categories and set job client category values for the job.

Functionality Overview

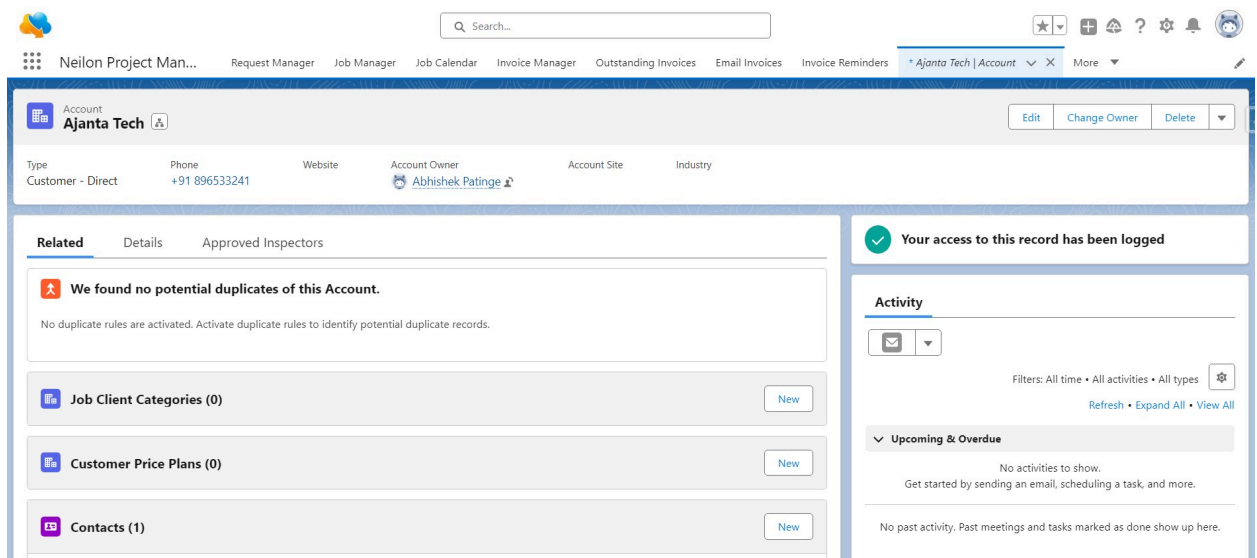
Create Job Client Categories

Follow the below steps to create job client categories for the job.

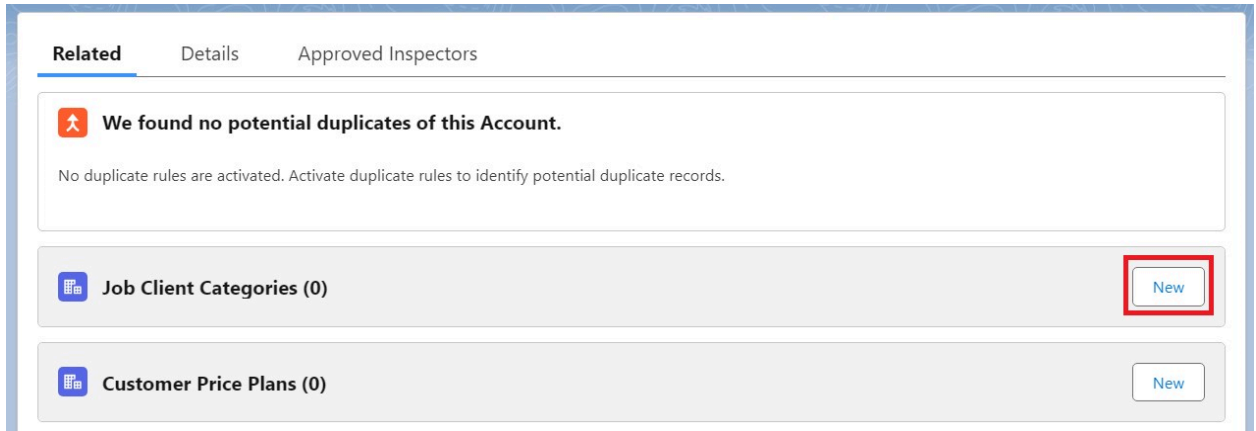
1. Go to the App launcher. Search **Accounts** and open the **Accounts** tab.
2. Click on the customer account record name to open the details for which you want to add client categories.



3. Go to the **Related** section.



- Click on the **New** button from the **Job Client Categories** section.



Related Details Approved Inspectors

 **We found no potential duplicates of this Account.**

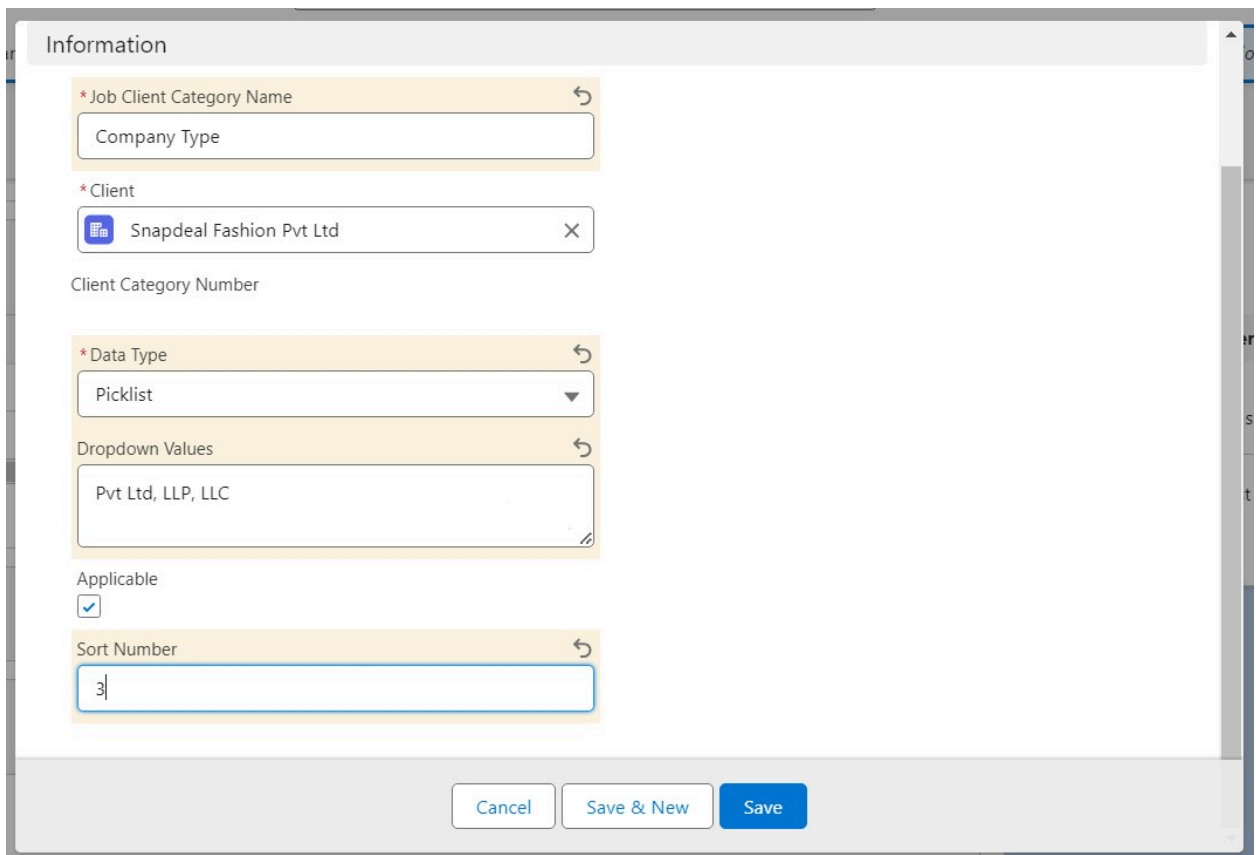
No duplicate rules are activated. Activate duplicate rules to identify potential duplicate records.

 **Job Client Categories (0)** New

 **Customer Price Plans (0)** New

- Provide the job client category name, client or customer, data type, picklist values, and sort number.

Note: There are 4 data types that you can select: Date, Picklist, Text, and Number. If you have selected Picklist in the data type, then you have to provide Picklist values in the **Dropdown Values** field in the comma-separated pattern.



Information

* Job Client Category Name 

Company Type

* Client

 Snapdeal Fashion Pvt Ltd 

Client Category Number

* Data Type 

Picklist

Dropdown Values 

Pvt Ltd, LLP, LLC

Applicable ☒

Sort Number 

3

Cancel Save & New Save

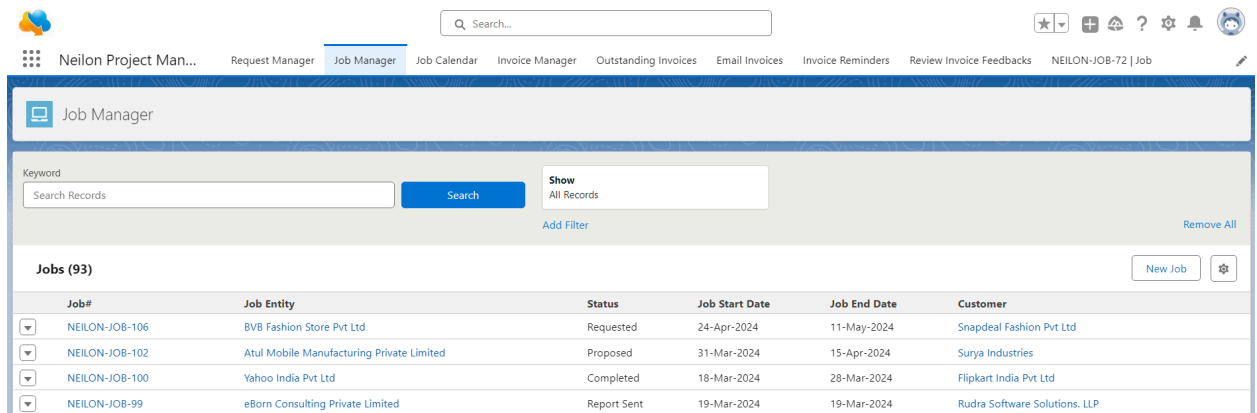
- After filling in the details, click on the **Save** button.

7. Client category records will be created.

Set Job Client Categories

Follow the below steps to set job client category values for the job.

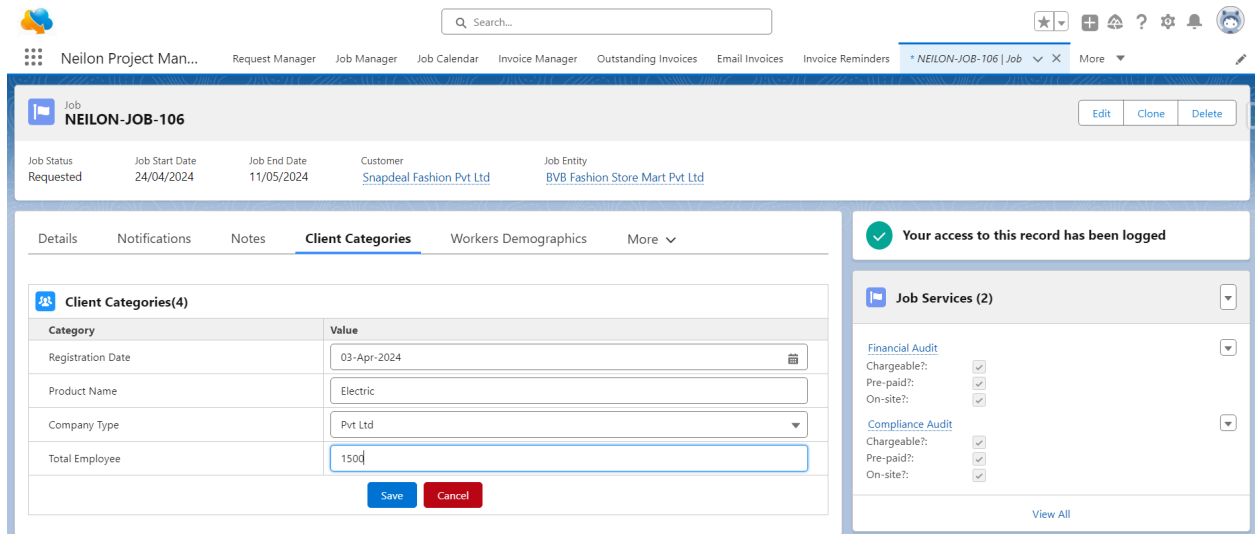
1. Navigate to the **Neilon Project Management** application from the App Launcher.
2. Go to the **Job Manager** tab.



The screenshot shows the 'Job Manager' tab in the Neilon Project Management application. At the top, there is a search bar and a 'Show All Records' button. Below this is a table of jobs. The table has columns for Job#, Job Entity, Status, Job Start Date, Job End Date, and Customer. There are 93 jobs listed.

Job#	Job Entity	Status	Job Start Date	Job End Date	Customer
NEILON-JOB-106	BVB Fashion Store Pvt Ltd	Requested	24-Apr-2024	11-May-2024	Snapdeal Fashion Pvt Ltd
NEILON-JOB-102	Atul Mobile Manufacturing Private Limited	Proposed	31-Mar-2024	15-Apr-2024	Surya Industries
NEILON-JOB-100	Yahoo India Pvt Ltd	Completed	18-Mar-2024	28-Mar-2024	Flipkart India Pvt Ltd
NEILON-JOB-99	eBorn Consulting Private Limited	Report Sent	19-Mar-2024	19-Mar-2024	Rudra Software Solutions. LLP

3. Open job record details by clicking on the job name from the Job# column.
4. Go to the **Client Categories** section. Here it will show all the client categories.
5. Provide client category values and click on the **Save** button. Client categories will be saved.



The screenshot shows the 'Job Details' page for 'NEILON-JOB-106'. The 'Client Categories' section is active, displaying a table with columns for Category and Value. The table contains four rows: Registration Date (03-Apr-2024), Product Name (Electric), Company Type (Pvt Ltd), and Total Employee (1500). There are 'Save' and 'Cancel' buttons at the bottom of the table. To the right, there is a 'Job Services' section with a list of services and checkboxes for 'Chargeable?', 'Pre-paid?', and 'On-site?'.

Category	Value
Registration Date	03-Apr-2024
Product Name	Electric
Company Type	Pvt Ltd
Total Employee	1500

6. If you want to cancel and reset, then click on the **Cancel** button. It will show older client category values.