Job Client Categories User Guide

Introduction

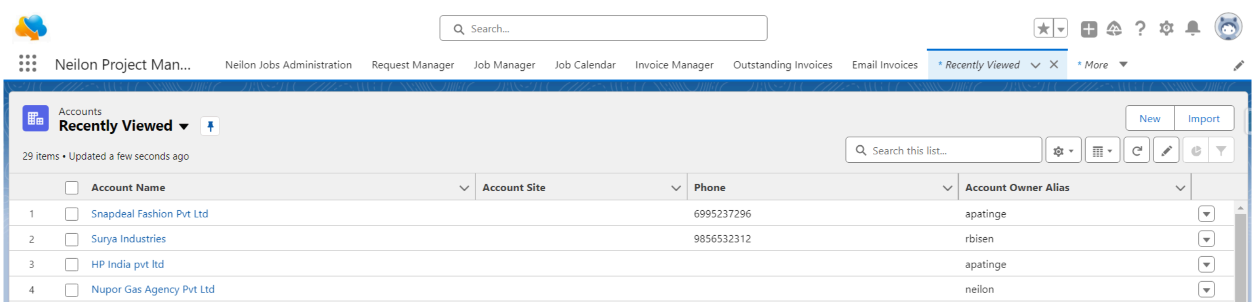
We have a feature in which you can categorize the customer's job using the categories provided by the customer. In this guide, we will see how you can create job client categories and set job client category values for the job.

Functionality Overview

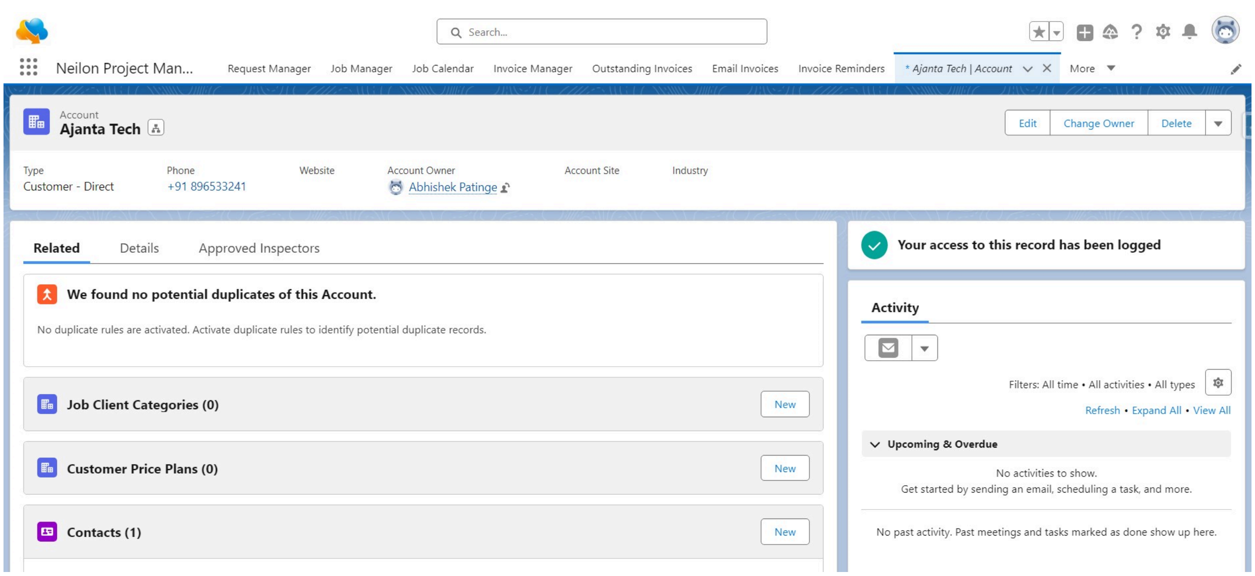
Create Job Client Categories

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

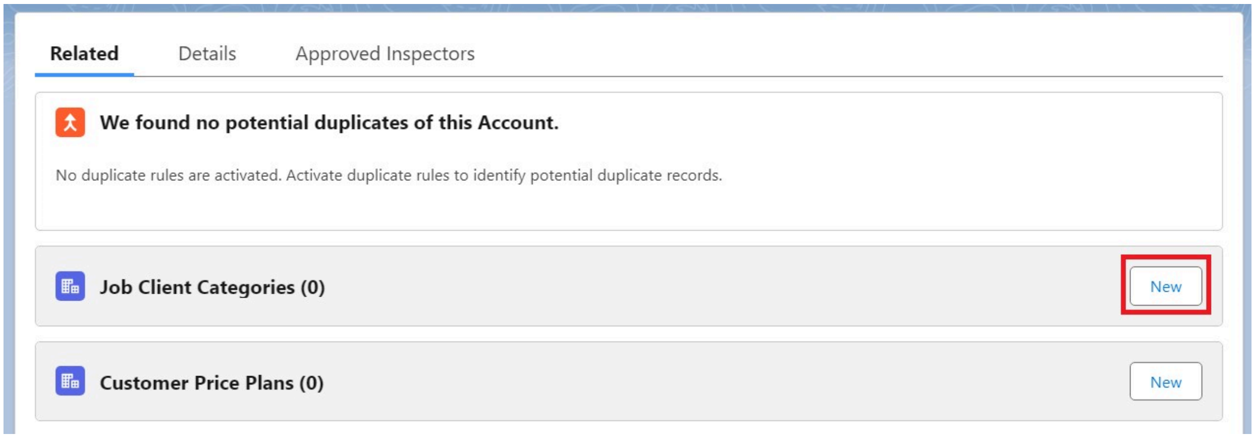
1. Go to the App launcher. Search **Accounts** and open the **Accounts** tab.
2. Click on the customer account record name to open the details for which you want to add client categories.



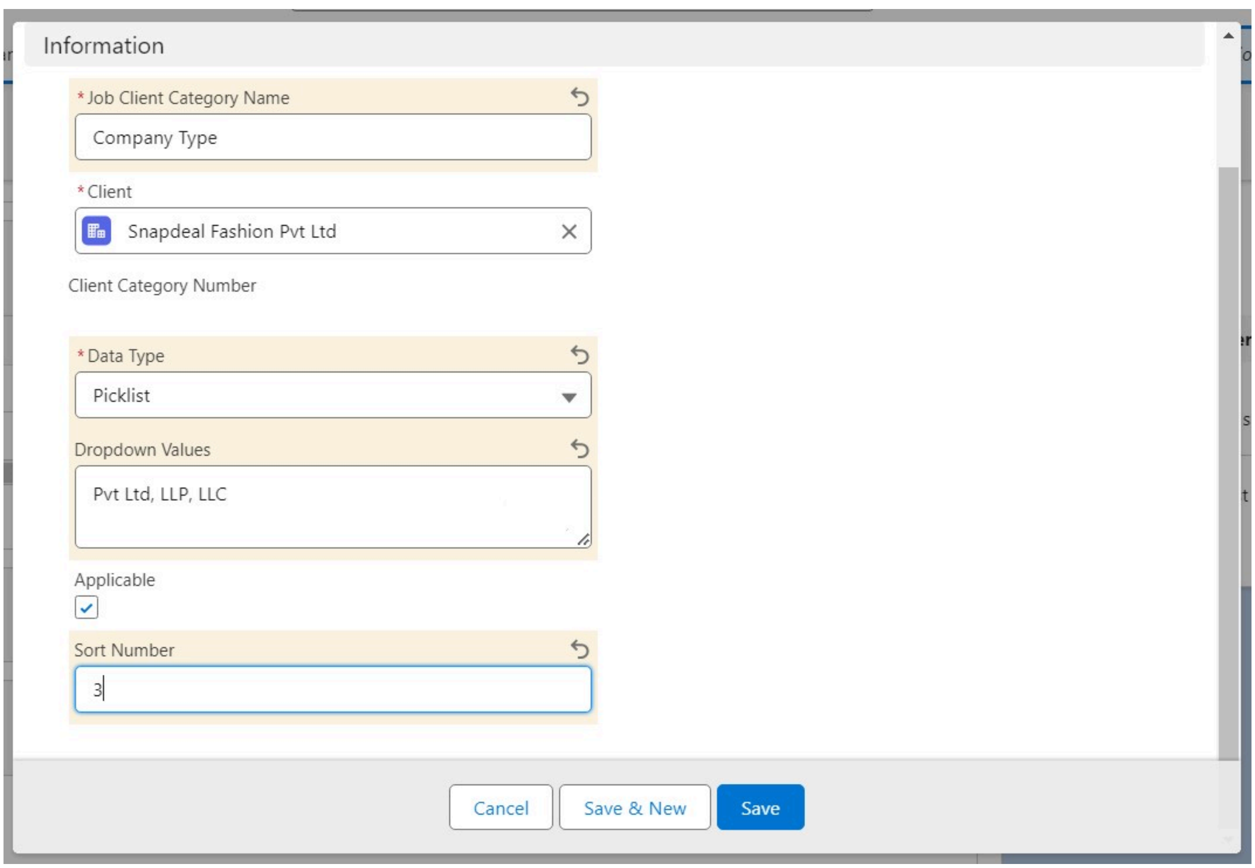
3. Go to the **Related** section.



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



5. 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.



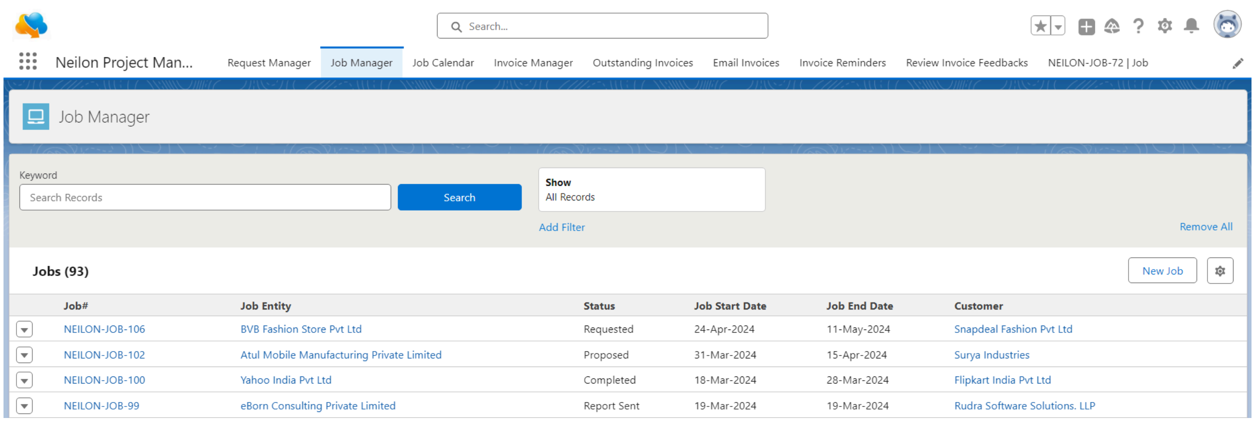
6. After filling in the details, click on the **Save** button.

7. Client category records will be created.

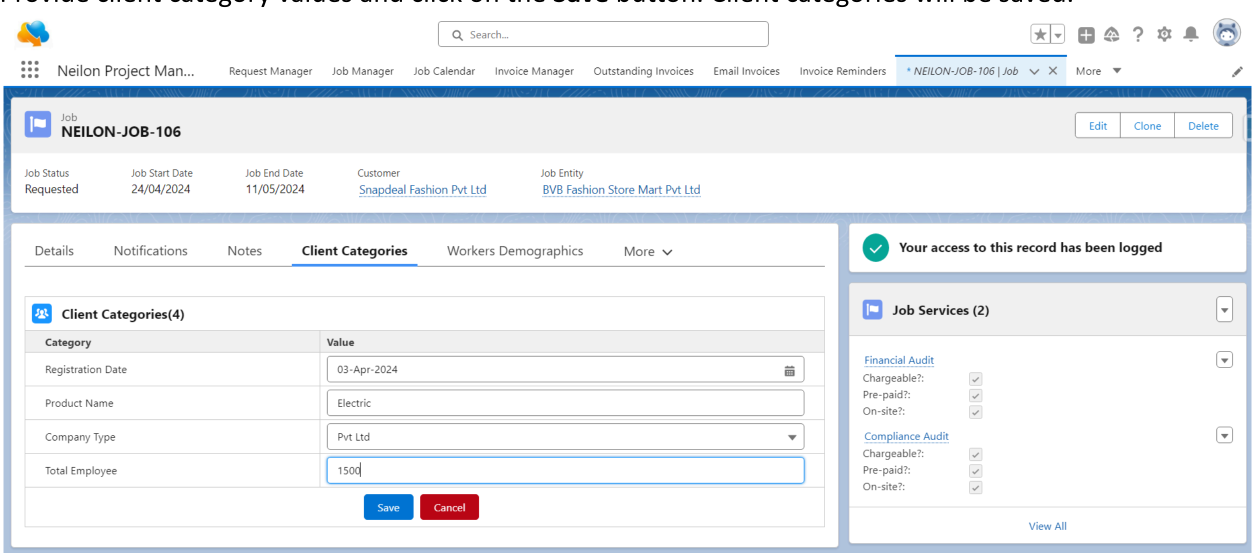
Set Job Client Categories

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.



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.



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