

# Convert Job Request To Job User Guide

## Introduction

Our functionality helps you convert your job requests directly into jobs without manually putting job request values into the job record. We use the job request data and it will auto-populate in the job record when you convert the job request to the job. It significantly reduces the time to create jobs for customers.

## Functionality Overview

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

The screenshot shows the Neilon Project Management application interface. The top navigation bar includes the application name, a search bar, and various icons. The 'Request Manager' tab is selected. Below the navigation bar, there is a search section with a 'Keyword' input field, a 'Search' button, and a 'Show' dropdown menu. Below the search section, there is a table of requests. The table has columns for Request#, Requester Name, Requester Email, Created, Requested By, Job Entity Name, Job..., T..., Al..., H..., Tot..., and Status. The table contains 43 requests. The 'Convert to Job' button is highlighted in the bottom right corner of the table.

| Request#         | Requester N... | Requester Email                 | Creat...     | Requested By                 | Job Entity Name              | Job... | T... | Al... | H... | Tot... | Status     |
|------------------|----------------|---------------------------------|--------------|------------------------------|------------------------------|--------|------|-------|------|--------|------------|
| REQ-2024-0001825 | Shyam Rajput   | srajput@amazon.com              | 19-Feb-20... | Amazon                       | Ajanta Tech                  | 5,000  | 200  | 1,500 | 500  | 7,200  | Quote Sent |
| REQ-2024-0001826 | Gourav More    | gmore@perficenttechnologies.com | 19-Feb-20... | Perficent Pvt Ltd            | Bee Basket Solutions Pvt Ltd | 8,000  | 100  | 1,300 | 300  | 10,400 | Quote Sent |
| REQ-2024-0001822 | James Garfield | jgarfield@myntradesigns.com     | 06-Feb-20... | Myntra Designs Pvt Ltd       | ASOS Pvt Ltd                 | 5,000  | 700  | 405   | 200  | 6,405  | Won        |
| REQ-2024-0001821 | Rupesh Desai   | desairupesh@click2cloud.com     | 06-Feb-20... | Click2cloud Services Pvt Ltd | Goneka Pvt Ltd               | 700    | 50   | 300   | 60   | 1,510  | Won        |

3. Click on **Convert to Job** row-level action of the job request for which you want to convert into job.

The screenshot shows the Neilon Project Management application interface, similar to the previous one, but with the 'Convert to Job' button highlighted in the bottom right corner of the table. The table contains 43 requests. The 'Convert to Job' button is highlighted in the bottom right corner of the table.

| Request#         | Requester N...   | Requester Email                 | Creat...     | Requested By                 | Job Entity Name              | Job... | T... | Al... | H... | Tot... | Status     |
|------------------|------------------|---------------------------------|--------------|------------------------------|------------------------------|--------|------|-------|------|--------|------------|
| REQ-2024-0001825 | Shyam Rajput     | srajput@amazon.com              | 19-Feb-20... | Amazon                       | Ajanta Tech                  | 5,000  | 200  | 1,500 | 500  | 7,200  | Quote Sent |
| REQ-2024-0001826 | Gourav More      | gmore@perficenttechnologies.com | 19-Feb-20... | Perficent Pvt Ltd            | Bee Basket Solutions Pvt Ltd | 8,000  | 100  | 1,300 | 300  | 10,400 | Quote Sent |
| REQ-2024-0001822 | James Garfield   | jgarfield@myntradesigns.com     | 06-Feb-20... | Myntra Designs Pvt Ltd       | ASOS Pvt Ltd                 | 5,000  | 700  | 405   | 200  | 6,405  | Won        |
| REQ-2024-0001821 | Rupesh Desai     | desairupesh@click2cloud.com     | 06-Feb-20... | Click2cloud Services Pvt Ltd | Goneka Pvt Ltd               | 700    | 50   | 300   | 60   | 1,510  | Won        |
| REQ-2024-0001814 | Sherlyansh Rodge | srodge@andhrabankcorp.com       | 05-Feb-20... | Andhra bank                  | West Ham Bank Pvt Ltd        | 1,800  | 30   | 600   | 90   | 2,700  | Won        |
| REQ-2023-0001813 | Ajit Pawar       | pawarajit@mhadaacorporation.com | 14-Dec-20... | MHADAA Corporation           | CIDCO Corporation            | 8,000  | 40   | 700   | 600  | 9,640  | Won        |
| REQ-2023-0001812 | Nitin Sharnagat  | sharnagatnitin@eichermotors.com | 14-Dec-20... | Eicher Motors Pvt Ltd        | Ajmera Motors Pvt Ltd        | 7,500  | 300  | 700   | 600  | 9,300  | Won        |

- It will open the UI to create a new job for the selected job request.

A few job fields like Assigned To, Currency, Customer, Job Due Date, Request Type, Special Notes, Confidential Notes will be auto populated using job request field values. You can also provide the values for other job fields from the UI.

The screenshot shows the 'New Job' form with the following fields and values:

- Primary Service:** Search Job Service Definitions...
- Currency:** USD
- Request Type:** Unannounced
- Priority:** Normal
- Payee:** Job Entity
- Pre-paid?:** ☐
- Assigned To:** Neilon Admin
- Female Staff Required?:** ☐
- Requested By:** Program
- Customer Job Number:**
- Previous Job:** Search Jobs
- Project Number:**

Buttons: Save, Cancel

- The **Customer** will be auto-populated using a job request if there is a customer set in the job request. Here, the customer was set for this job request so we can see the customer is auto-selected. Otherwise, you can create a new one or select from existing customers.

The screenshot shows the 'New Job' form with the following fields and values:

- Other:** Strikes & Political Unrest
- Customer:** Surya Industries
- Customer Contact:** Select Contact
- Vendor:**
- Vendor Contact:**

Buttons: Save, Cancel

| Customer |                 |
|----------|-----------------|
| City     | Vadodara        |
| Country  | India           |
| State    | Gujrat          |
| Zip Code | 965452          |
| Address  | Jabil residence |
| Phone    | 9856532312      |
| Fax      | (123) 456-7890  |

6. You can see the **Job Request Data** below the **Vendor, Job Entity, Agent, Licensee, and Other Payer** sections which are coming from the selected job request.

The screenshot shows the 'New Job' form with the 'Job Entity' section expanded. Below the search bars, a table labeled 'Job Request Data' is highlighted with a red border. The table contains the following information:

| Job Request Data |                                                                                | Job Request Data |                 |
|------------------|--------------------------------------------------------------------------------|------------------|-----------------|
| Name             | Ajanta Tech                                                                    | Name             | Anand Mathur    |
| City             | Nagpur                                                                         | Email            | anand@gmail.com |
| Country          | India                                                                          | Title            | Manager         |
| State            | Maharashtra                                                                    | Phone            | 8789855456      |
| Zip Code         | Not available                                                                  |                  |                 |
| Address          | B-401 Mahadev Tower, IT Park, Pratap Nagar, Nagpur, Maharashtra, India, 380052 |                  |                 |
| Phone            | Not available                                                                  |                  |                 |
| Fax              | Not available                                                                  |                  |                 |

7. You can directly create a new **Vendor, Job Entity, Agent, Licensee, and Other Payer** using these **Job Request Data**, You do not have to put data manually (as we are using the job request data).
8. Let's create a new job entity account & contact using **Job Request Data**. Click on the plus icon beside the **Job Entity** lookup.

The screenshot shows the 'New Job' form with the 'Job Entity' section expanded. The plus icon next to the 'Job Entity' search bar is highlighted with a red box. The 'Job Request Data' table is also visible, showing the same information as in the previous screenshot.

9. It will auto-populate the Job Entity account details in the **Account Information** using **Job Request Data** highlighted in the screenshot below.

The same applies to the Job Entity Contact when you click on the plus icon to create a new Job Entity Contact.

New Job

Job Entity

\* Job Entity

Search Accounts...

Q

+

\* Job Entity Contact

Search Contacts...

Q

+

Job Request Data

|          |                                                                                |       |                 |
|----------|--------------------------------------------------------------------------------|-------|-----------------|
| Name     | Ajanta Tech                                                                    | Name  | Anand Mathur    |
| City     | Nagpur                                                                         | Email | anand@gmail.com |
| Country  | India                                                                          | Title | Manager         |
| State    | Maharashtra                                                                    | Phone | 8789855456      |
| Zip Code | Not available                                                                  |       |                 |
| Address  | B-401 Mahadev Tower, IT Park, Pratap Nagar, Nagpur, Maharashtra, India, 380052 |       |                 |
| Phone    | Not available                                                                  |       |                 |
| Fax      | Not available                                                                  |       |                 |

Agent

Agent

Search Accounts...

Q

+

Agent Contact

Search Contacts...

Q

+

Job Request Data

Job Request Data

SaveCancel

New Job

Add Account

Account Information

\* Name

Ajanta Tech

City

Nagpur

Country

India

Phone

Customer

☐

Job Entity

☒

Licensee

☐

Address

B-401 Mahadev Tower, IT Park, Pratap Nagar, Nagpur, Maharashtra, India, 380052

State

Maharashtra

Zip Code

Fax

Vendor

☐

Agent

☐

Other Payer

☐

Save

Cancel

10. You can set an account type as a Customer, Vendor, Job Entity, Agent, Licensee, or Other Payer.

**New Job**

**Add Account**

**Account Information**

\* Name:  Address:

City:  State:

Country:  Zip Code:

Phone:  Fax:

Customer: ☐ Vendor: ☐

Job Entity: ☒ Agent: ☐

Licensee: ☐ Other Payer: ☐

**Save** **Cancel**

11. Click on the **Save** button.
12. A job entity account and contact will be created and set as **Job Entity** (account record) and **Job Entity Contact** (contact record) in their respective fields. Its details are also displayed below the field.

**New Job**

**Job Entity**

\* Job Entity:  Job Entity Contact:

City: Nagpur Name: Anand Mathur

Country: India Email: anand@gmail.com

State: Maharashtra Title: Manager

Zip Code: Not available Phone: 8789855456

Address: B-401 Mahadev Tower, IT Park, Pratap Nagar, Nagpur, Maharashtra, India, 380052

Phone: Not available

Fax: Not available

**Agent**

Agent:  Agent Contact:

**Job Request Data**

Name: Not available

City: Not available

**Save** **Cancel**

13. If you want to add only a new contact for any existing selected Customer, Vendor, Job Entity, Agent, Licensee, or Other Payer, then you can add it by clicking on the plus icon beside the respective contact lookup field.

**New Job**

**Job Entity**

\* Job Entity

Ajanta Tech

City Nagpur  
Country India  
State Maharashtra  
Zip Code Not available  
Address B-401 Mahadev Tower, IT Park, Pratap Nagar, Nagpur, Maharashtra, India, 380052  
Phone Not available  
Fax Not available

Job Entity Contact

Anand Mathur

Name Anand Mathur  
Email anand@gmail.com  
Title Manager  
Phone 8789855456

**Agent**

Agent

Search Accounts...

Agent Contact

Search Contacts...

**Job Request Data**

Name Not available  
City Not available

**Job Request Data**

Name Not available  
Email Not available

Save Cancel

14. By default, it will auto-populate the account information in read-only mode for which you are adding new contact.

**New Job**

**Add Contact**

India  
Phone  
Customer  
☐  
Job Entity  
☒  
Licensee  
☐

Fax  
Vendor  
☐  
Agent  
☐  
Other Payer  
☐

**Contact Information**

First Name

Anand

\* Last Name

Mathur

Title

Manager

Phone

8789855456

Email

anand@gmail.com

Save Cancel

15. Provide or update contact information and click on the **Save** button.

NEW JOB

### Add Contact

India  
Phone  
Customer  
☐  
Job Entity  
☒  
Licensee  
☐

Fax  
Vendor  
☐  
Agent  
☐  
Other Payer  
☐

#### Contact Information

First Name  
Anand

\* Last Name  
Mathur

Title  
Manager

Phone  
8789855456

Email  
anand@gmail.com

Save Cancel

16. If you do not want to create new accounts and contacts, you can select the existing Customer, Vendor, Job Entity, Agent, Licensee, and Other Payer and their contacts from their respective sections. Simply search it by name and select it.
17. In the **Remarks** section, Description, Special Notes, and Confidential Notes values are auto-populated using a job request. You can change the values of these fields if you want.
18. Make sure you have selected or added **Customer** and **Job Entity** because they are required to create a job.
19. After providing all the details, click on the **Save** button below to convert job request to job.
20. The job request will be converted to a job and a new job will be created.