Job Status Tracking & Reports
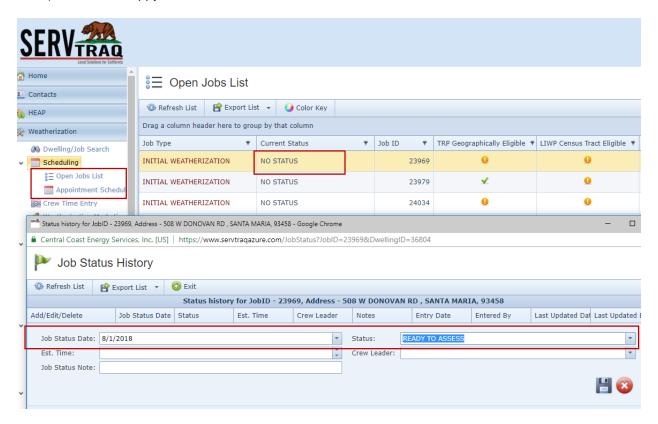
Background:

Job Statuses can be used to track the progress of Weatherization Jobs at every stage. The Job Status options in the drop down list can be changed to tailor your agency's needs and preferences via the Administration page.

Procedure:

Jobs can be assigned a new status via the *Open Jobs List* page, *Appointment Schedule* page, and via the *Job Details* page.

1) To assign a "status" to a Job via the *Open Jobs List*, simply **click** on the job's **current status link**.

2) A second page will open where you can assign a date, status, notes or crew leader. (Only a date and status are required to save an entry.)
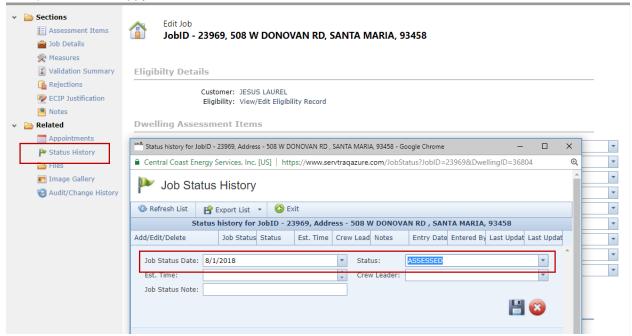
3) Click the Floppy Disk to Save.

Job Details Page

If can also update the Job's status via the Job Details page:

1) **Click** on the **Status History** link located under the Related Section Menu.

2) A second page will open where you can assign a date, status, notes or crew leader. (Only a date and status are required to save an entry.)
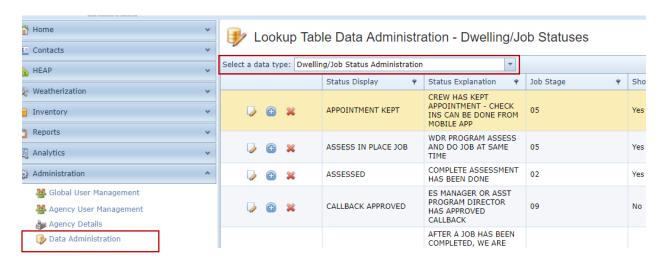
3) Click the Floppy Disk to Save.

Editing/Setting up Job Status

ServTraq has a default list of job statuses, however you can edit these to create a workflow better suited to the flow of your agencies own internal processes.

To edit these, simply locate the Administration>Data Administration>Dwelling/Job Status Administration page.
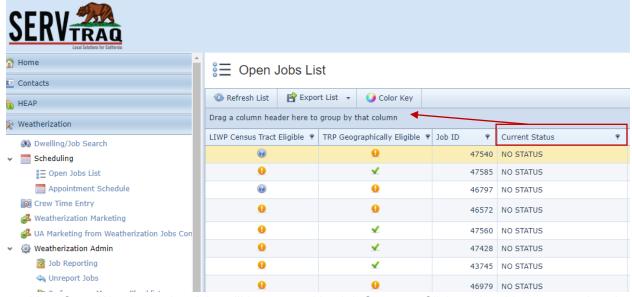You can add, edit, or delete current Statuses available.

Update a Job Status

You can also sort your open jobs by job status to see how many jobs you have in particular stages and therefore redirect focus to those jobs that may need it most.

Go to the Open Jobs List and drag and drop the **current status column to the "Grouping Section"**

Your Open Weatherization Jobs will be grouped by Job Statuses. Click on the side carrot to view the details.