knowledge well

CM - Job Creation

KL Support - 2017-03-14 - Campaign Managment (CM)

Edit

AT A GLANCE:

01. Select jobs

02. Select add job

03. Select client

04. Select job group and sub group

05. Enter job title and other information

06. Select save

07. Enter job details

08. Select brief and add files

09. Select media (for publication jobs

10. Enter revision information

11. Enter dispatch information

12. Print job sheet

01.SELECT JOBS

Select Jobs from the top of the screen. The job search screen panel will be displayed. Below this is the list of all current active jobs.

02.SELECT ADD JOB

Select Add Job from the base of the screen.

Alternatively: you can select new from the top menu panel and new job from the drop down list.

03.SELECT CLIENT

Select the required client from the drop down list

04.SELECT JOB GROUP AND SUB GROUP

If required select the job group (division) and sub-group from the drop down list

05.ENTER JOB TITLE AND OTHER INFORMATION

Enter the job title.

Select the job type from the drop down list.

Select the price list from the drop down list if required. Enter the client reference and the client order
number if supplied.

Enter the job description.

06.SELECT SAVE

Select save from the bottom right of the screen.

07.ENTER JOB DETAILS

Details will be picked up from the campaign (if selected) and the base information entered on
the previous screen.

Enter the date required.

If required, select from the drop down lists: client contact, account manager and sales rep. Also
add the supplier (if files are expected to arrive from a third party) and any relevant estimate
information.

In the second column, select the priority, department (if require and any proofing requirements.

Add additional notes in the third column.

Select save from the bottom right of the screen.

08.SELECT BRIEF AND ADD FILES

Enter job brief information and instructions into the required fields

Note: this area may differ from job type to job type as the area can be customised

Select add files from the base of the screen to upload any required job files. Select choose file,
locate your file, select save in the pop up window.

Select save from the bottom right of the screen.

09.SELECT MEDIA (FOR PUBLICATION JOBS)

Select add publication from the base of the screen.

Select the required database from the drop down (eg: local or specle).

Select and enter the required publisher and complete publication information.

Select save from the base of the screen.

10.ENTER REVISION INFORMATION

Select the revisions tab from the top of the screen. Select add revisions from the base of the

screen.

Enter revision title, due date and description. Enter price, time and material fields if required.

Select save from the base of the screen.

11.ENTER DISPATCH INFORMATION

Note: This information will most likely be entered at a later stage in the job process.

Select add dispatch tab.

Enter dispatch reference, select media type, enter scheduled date and delivery information.

Select save from the base of the screen.

12.PRINT JOB SHEET

From the top of the screen select the details tab.

From the base of the screen select Job sheet to print out a job ticket if required.

SEE ATTACHMENT BELOW:

Attachments

- [03_WL016_A_JobCreation_QRG_1.0.pdf (32.13 KB)](03_WL016_A_JobCreation_QRG_1.0.pdf)