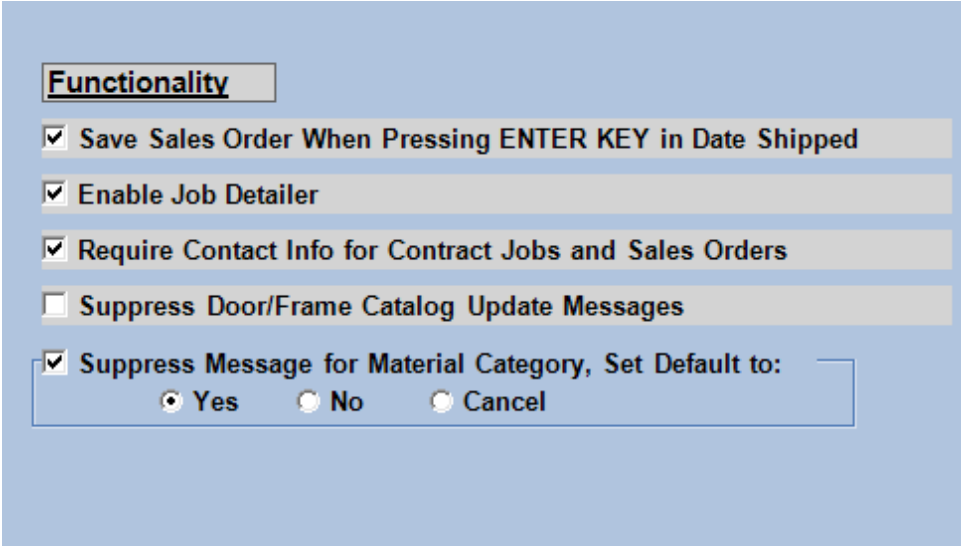# Job Detailer

This feature allows an Admin user to set up users as Detailers giving them access to Contract Jobs or Contract Proposals they have been assigned to. The jobs not assigned to will be invisible to them. If you wish to use this feature every user that does not have Admin rights will not see any Contract Jobs or Contract Quotes until they have been assigned as Detailers to various jobs.

How it works:

1. Launch Software for Hardware.
2. From the Logo screen click *File*.
3. Choose *Optional Settings*.
4. Select *Company*.
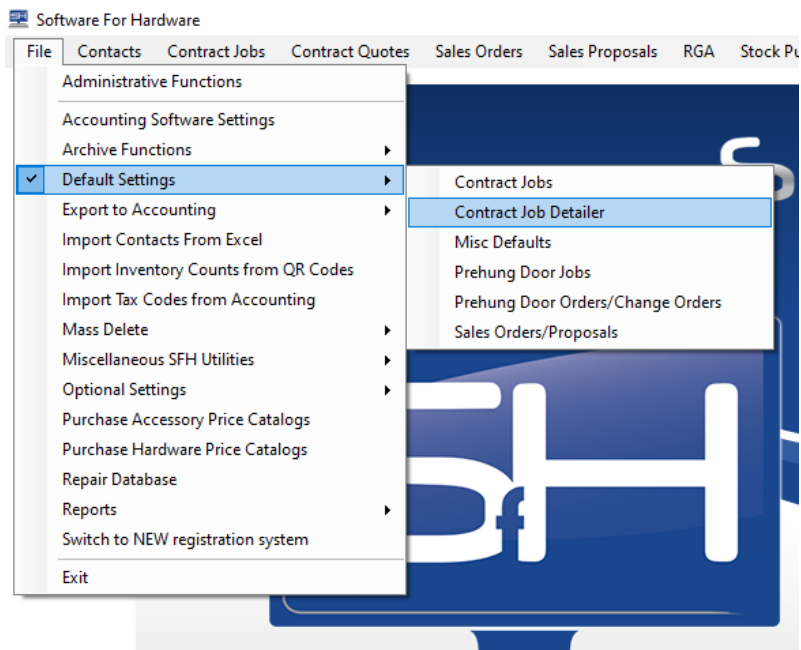5. The Company Options screen appears.

6. There is a new checkbox in the *Functionality* section entitled *Enable Job Detailer*.
7. To enable just check the box and click *Save*.
8. Next you must add a Detailer account.
9. From the *Administration* form off the *File* menu add a user.
10. Check the *Job Detailer* box.
11. Check other boxes if you want this user to have additional rights.
    a. You can also modify an existing user account to be a Job Detailer.
12. Please refer to the image at the top of the next page.
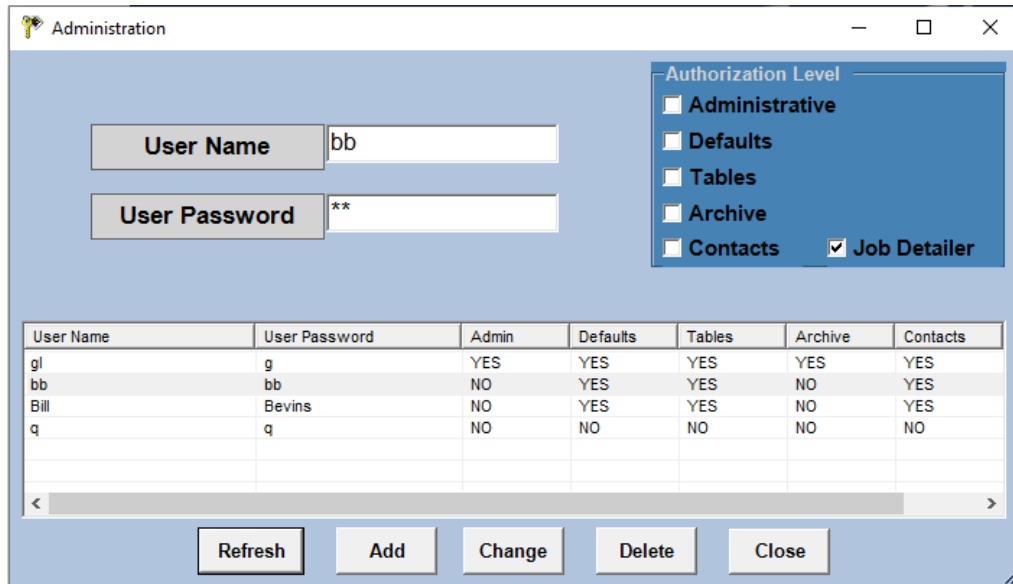
13. When finished adding or changing a Job Detailer account just click *Close* to exit.
14. Now, the first step is to assign Detailers to jobs and/or quotes.
15. From the Logo screen click *File*.
16. Click *Default Settings*.
17. On the fly out menu select *Contract Job Detailer*.

18. The following form appears listing all the Contract Jobs and Contract Quotes:

19. In the example above we are telling the grid to display jobs where status equals quote. **The default will be all jobs and quotes regardless of status.**
20. To add a user as a Detailer to a job simply click the *Detailer* cell on the same line as the job you wish to assign.
21. A pop-up form will appear listing all users.

22. Select the user you wish to assign as Detailer for this job by checking the box next to the user's name. Then click *Save*.
23. Conversely, to remove a Detailer from a job/quote, simply remove the check next to the Detailer's name.
24. Once defined, a Detailer can log into SFH and when they view the listing of Contract Jobs or Contract Quotes, only those jobs/quotes they are assigned to will appear in the grid.

Job Name	Job Number	Salesperson	Project Manager	Job Status	Contractor	Date Created	Date Approved
August 1 Quote	08012016	Bill Bevins		Quote	Blue Mountains Contractors and Builders	08/01/2016	

25. The above example shows the Contract Quote Detailer bb is assigned to and nothing else. **PLEASE NOTE – any user not set up as a Detailer, and, not containing Admin rights will see a blank grid.**

Assigning Detailers from within a Contract Job or Contract Quote:

1. You can also assign Detailers from within a Contract Job or Contract Quote. **Please Note – you must have Admin rights to assign Detailers from within a job/quote.**
2. Open a Contract Job or Contract Quote.
3. On the Project screen you will see the new *Detailer* field to the right.

Detailer
bb

om	Location 2	Int. / Ext.	Product Ty
		I	Door/Frame
		E	Door/Frame

4. To assign a Detailer click the dropdown box and select a Detailer from the list. Click the *Save* button.
5. A Detailer can be removed from the current job/quote by either selecting another Detailer, or selecting the blank space in the dropdown and then clicking *Save*.

Please Note – For a *Job Detailer* account most of the Logo screen menus are disabled preventing the user entry.