# **Requester User Guide**

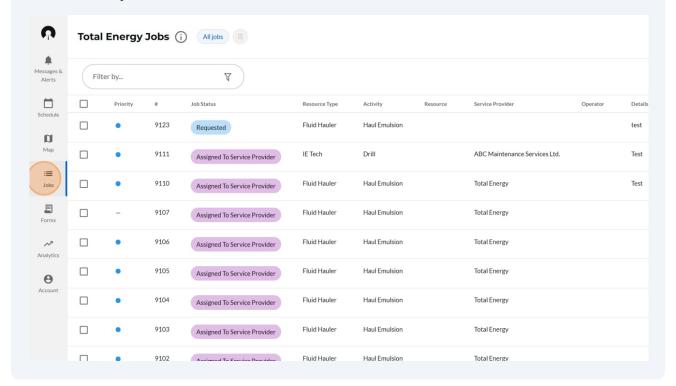
#### 1 Create a New Job

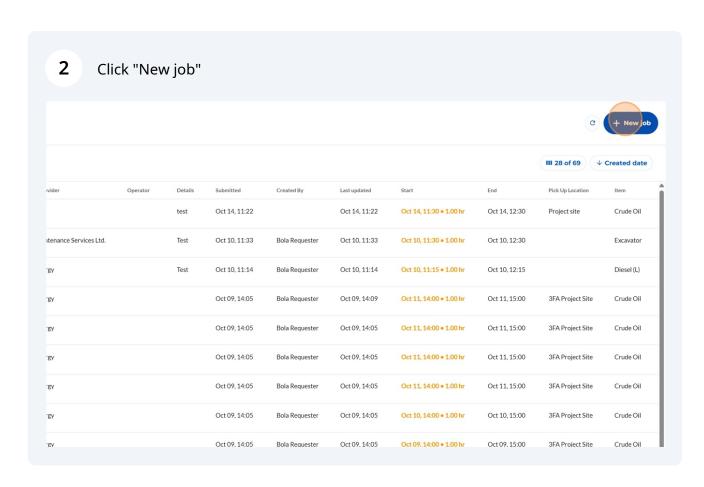
To create a new job:

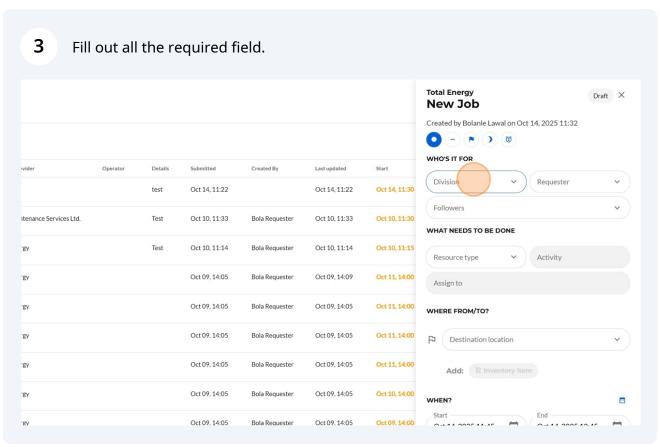
- Navigate to the **Jobs** tab.
- Click on + New Job. A new job creation window will appear.
- Fill in all required fields, including:
  - Division
  - Requester Name
  - Followers Users who will receive updates on this job.
  - Resource Type
  - **Activity** e.g., *Haul to Disposal*, *Service*, or *Maintenance*.
- If you have permission, you can assign the job to a **Company** and **Resource (Truck)**. > **Note:** Once a job is assigned to a specific truck or user, other trucks/users in that company will no longer see that Job.
- Enter the **Pickup** and **Destination** locations.
- Select the **Inventory Type** being moved and specify the **Quantity**.
- Set the **Start Date** and **End Date** for the job.

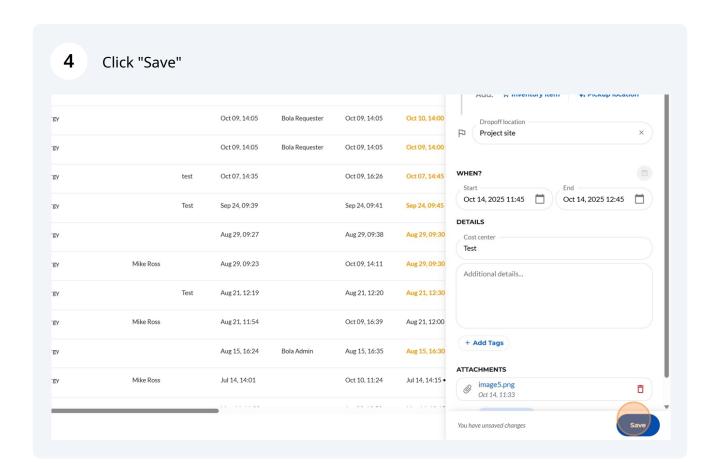
To create multiple jobs at once, click the **Calendar** icon, choose the number of jobs to create, enter details, and click **Save**.

Click "Jobs"







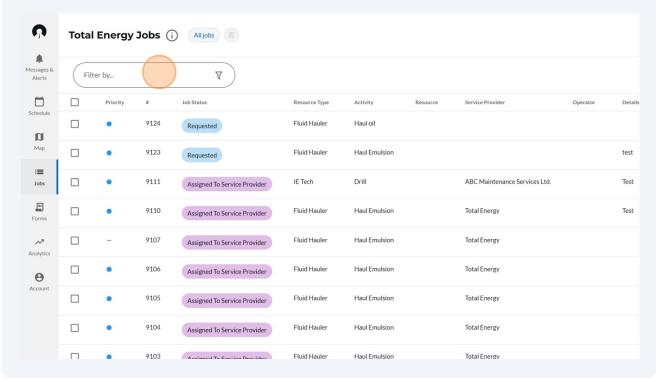


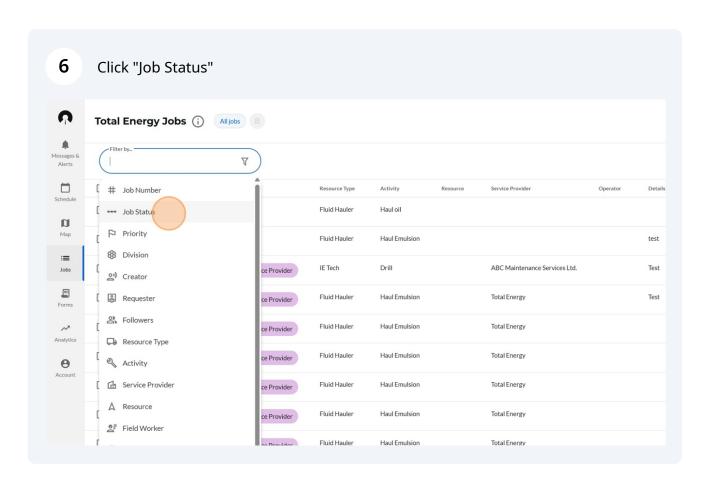
## 5 Find and Edit Your Job

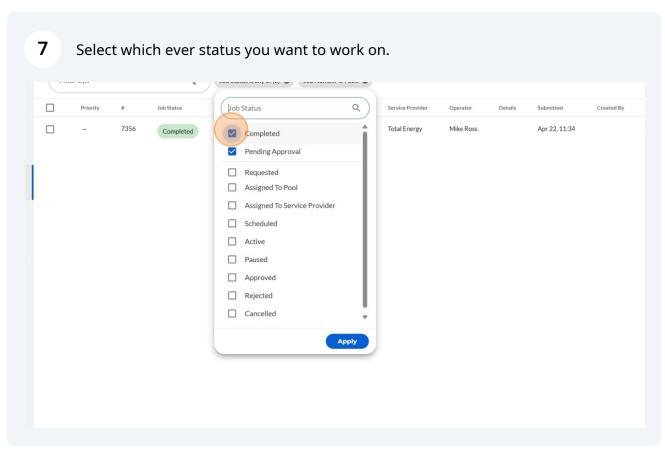
To locate and edit an existing job:

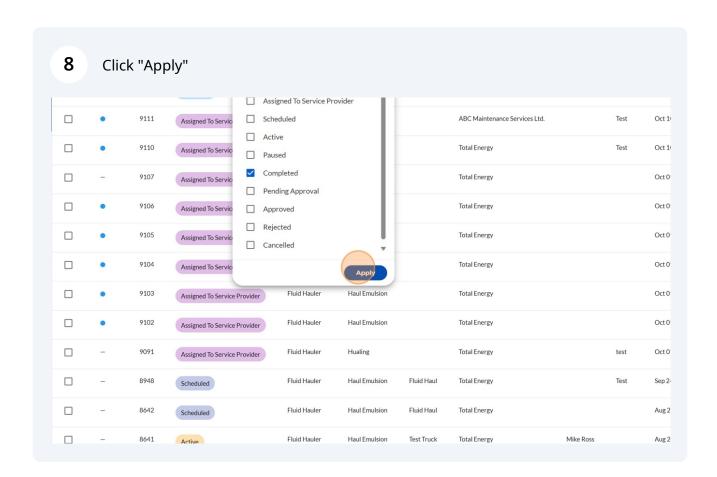
- Go to the **Jobs** tab.
- Click on the **Filter By** field to open filter options.
- Choose a filter type for example: *Job Number*, *Job Status*, *Activity*, *Requester*, or *Completed Date*.
- Enter your search value (e.g., job number "123456").
- Click into the job to view its details.

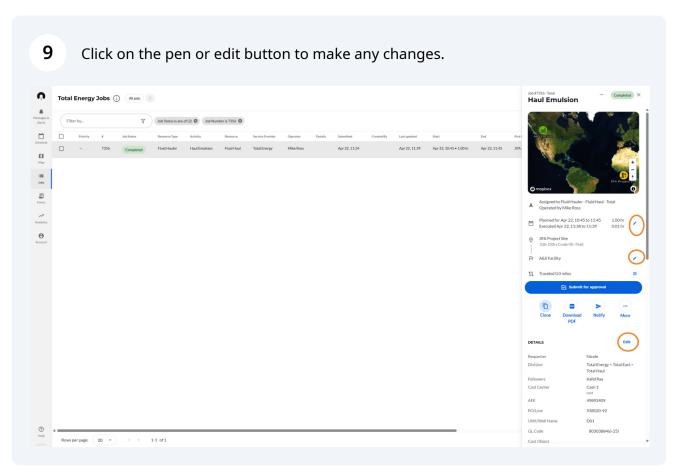
Click **Edit**, make necessary changes to locations, forms or line items, and save your updates.









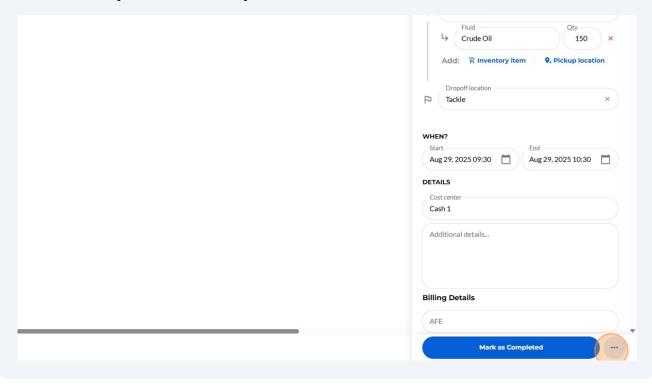


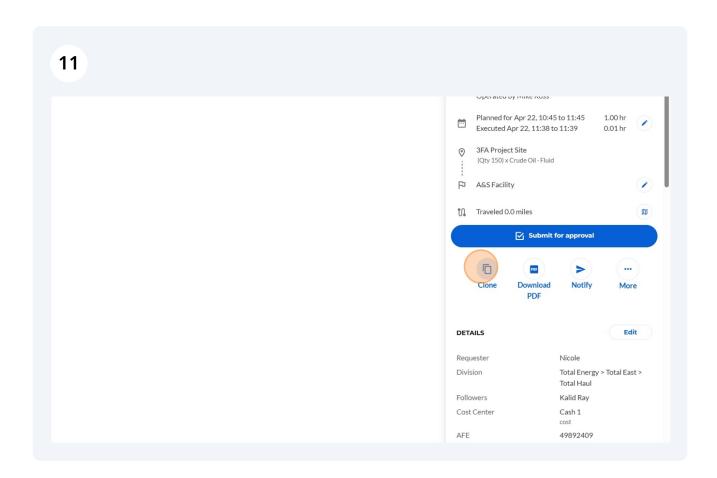
## 10 Clone a Job

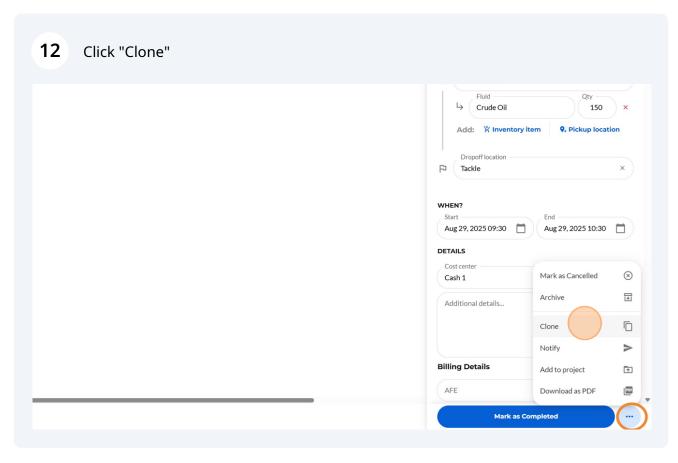
To quickly duplicate a job:

- 1. Find the job you want to clone.
  - Click the **three dots (...)** at the bottom of the job.
- If the job is marked as **Completed**, you'll see the **Clone** option listed just below the **Download PDF** button.
  - Select Clone to duplicate the job.

The system will automatically copy most of the job's details, helping you create a similar job more efficiently.



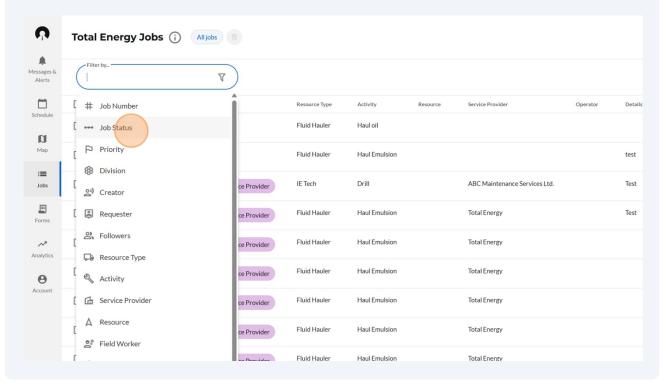


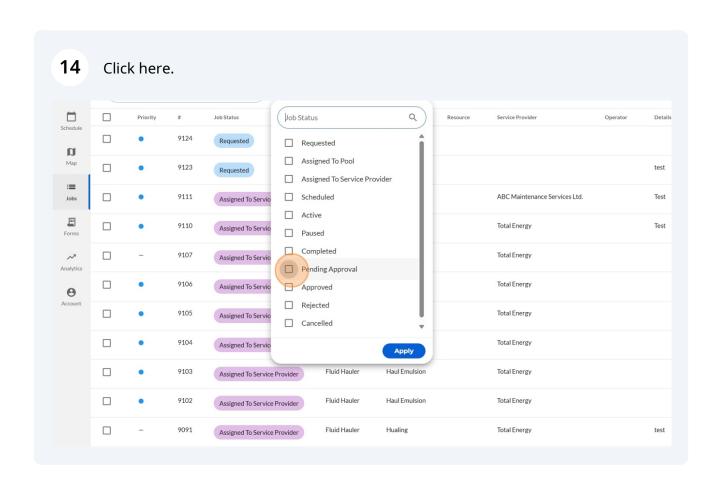


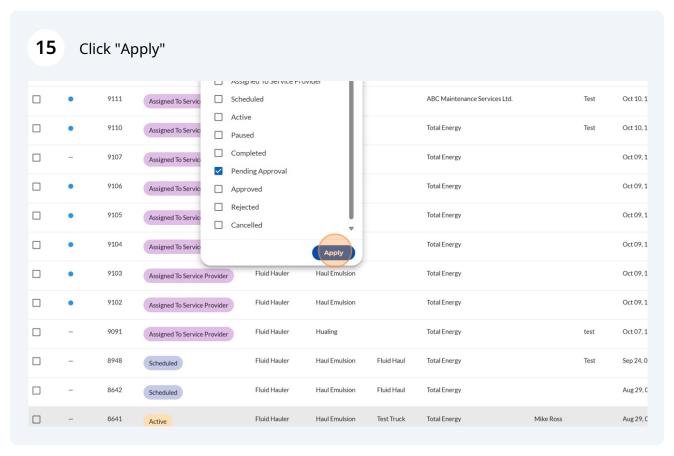
#### 13 Find Pending Approval Jobs

To view and act on pending approval jobs:

- Go to the **Jobs** tab.
- ullet Click Filter By o select Job Status.
- Choose **Pending Approval**.
- (Optional) Apply a **Date Range** filter to narrow results.
- Open a job to review details.
- Click on the More Button
- Click **Approve** to approve the job. Please note that jobs should only be approved after all information has been reviewed and verified as correct.



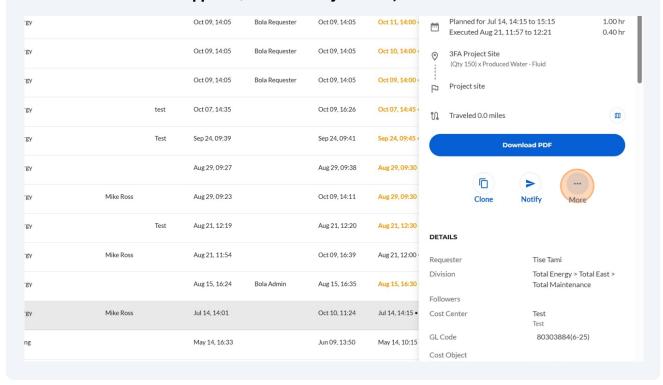


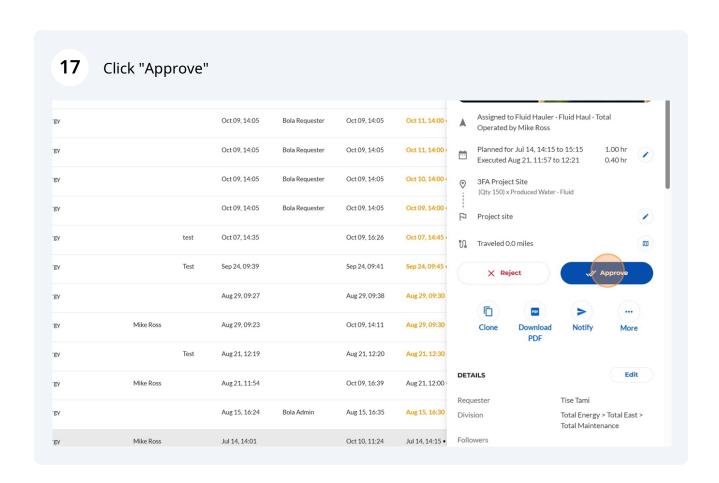


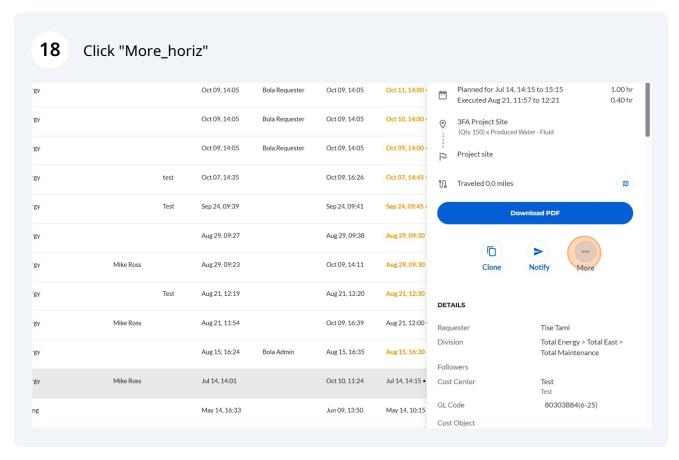
#### 16 Approve or Reject a Job

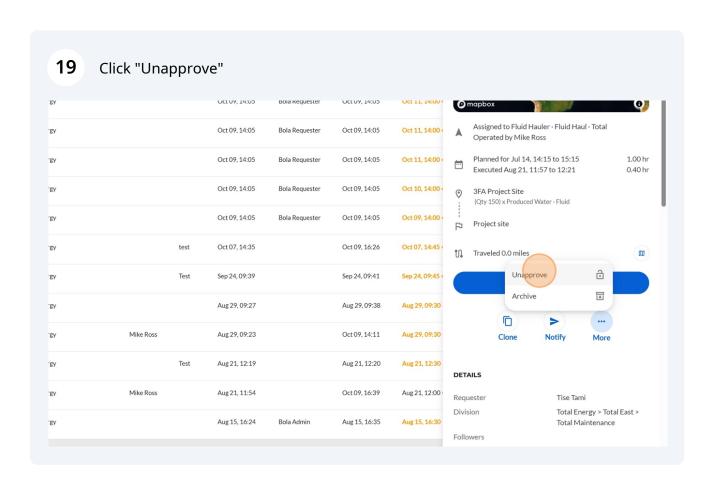
To approve or reject a job:

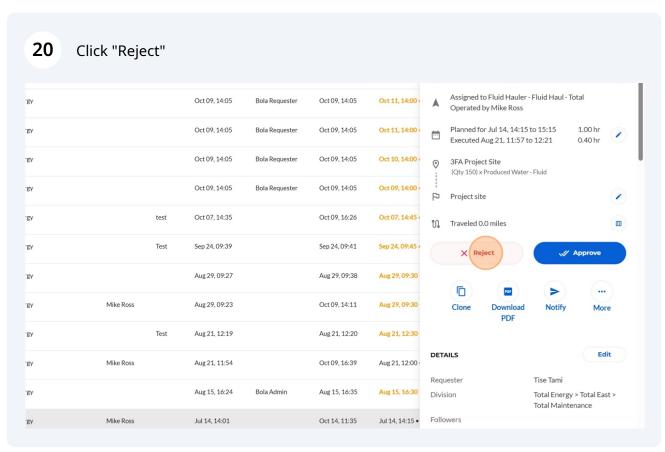
- Find the completed job.
- Click the **three dots (...)** and select **Approve** after verifying all information is correct.
- To **reject a job**: > This is usually done when the job information needs correction
  - Go to an approved job.
  - Click the **three dots** (□).
  - First click Unapprove, then select Reject if the job details are incorrect.

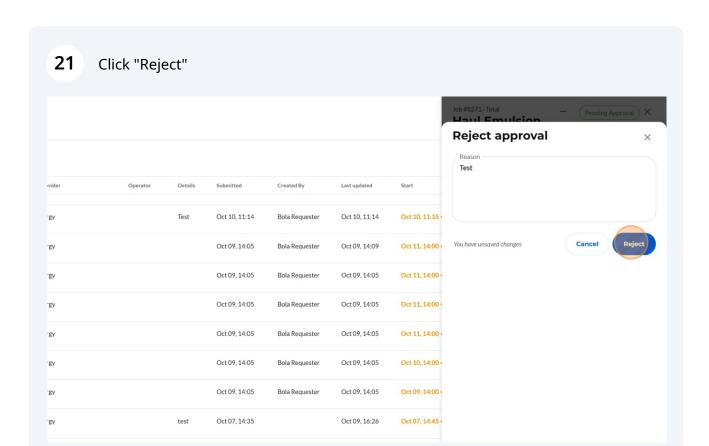












## 22 Best Practices

- Always confirm job details before approving or rejecting.
- Only assign jobs to vendors or trucks if you have the appropriate permissions.
- Keep followers updated to ensure visibility on all job changes.
- Use filters and date ranges to locate specific jobs faster.