

Job Workload Management

Overview

The **Job Workload Management** feature allows you to do the following:

- Manage repair and custom job workloads.
- Set job lead times.
- Set and enforce daily limits to prevent overbooking too many jobs due for a particular day.

Job lead times are used to automatically suggest the ETA during the job intake at POS. If you have set daily limits, then the software will dynamically change the suggested ETA based on not exceeding these limits.

For example, Bob's Jewelry Store has set the **Repair Lead Time** to **3 days** and put a **Daily Limit** of **5 jobs** on Friday's. On Tuesday, an associate takes in a repair. The Edge will look at the lead time and daily limits:

- If there are less than 5 jobs already promised due on Friday (Tuesday + 3 days), it will suggest Friday as the ETA.
- If there are 5 or more jobs already promised due, it will automatically push the ETA out to the next available day that has not exceeded its daily limit.

Setup

To configure **Job Workload Management** settings:

1. Click **Administrative > Repair > Job Workload Management**. The **Settings** window will appear.

Job Lead Time Settings

Job Lead Time Settings

Repair Lead Time: 3 Count towards Daily Limit

Custom Job Lead Time: 14 Count towards Daily Limit

Individual Repair and Custom Jobs that can be processed for these days.

Sunday Jobs: 0 Count each Repair and Custom Job task individually when an ETA is present on the task.

Monday Jobs: 5

Tuesday Jobs: 5 On Intake Only - require an override to add a repair to a day that has hit its ETA limit.

Wednesday Jobs: 5

Thursday Jobs: 5 Daily limit includes repairs that are done early.

Friday Jobs: 5

Saturday Jobs: 5

Close Cancel

2. At the top, set the **Repair** and/or **Custom Job Lead Times**. This number of days will be used when suggesting ETA during the job intake.

Repair Lead Time: 3 Count towards Daily Limit

Custom Job Lead Time: 14 Count towards Daily Limit

- Next, use the drop-downs to select how lead times will be utilized:

Use Lead Time Only	Apply lead time when suggesting job ETA but do not enforce any daily limits.
Count towards Daily Limit	Apply lead time when suggesting job ETA and enforce daily limits to prevent overbooking. There is an option to allow overrides.
No Lead Time or Daily Limit	Do not set lead times or enforce daily limits.

- If using **Daily Limits**, set them now. Note that setting a limit of 0 will exclude that day from ever being used as an ETA date.

Sunday Jobs	<input type="text" value="0"/>
Monday Jobs	<input type="text" value="5"/>
Tuesday Jobs	<input type="text" value="5"/>
Wednesday Jobs	<input type="text" value="5"/>
Thursday Jobs	<input type="text" value="5"/>
Friday Jobs	<input type="text" value="5"/>
Saturday Jobs	<input type="text" value="5"/>

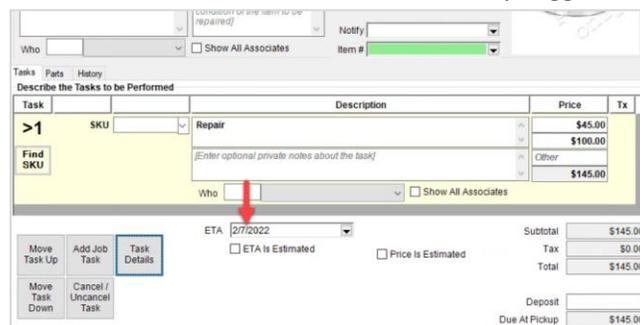
- Review and set desired options:

Count each Repair and Custom Job task individually...	When enforcing daily limits, the software looks at number of tasks instead of number of jobs. This requires that you set individual ETAs per job task rather than setting one overall ETA.
On Intake Only – require an override...	Check this to require associates have the permission “Add Job to a day that is already full” to override the daily limit when setting ETA manually.
Daily limit includes repairs that are done early.	If unchecked, repairs will stop counting towards the daily limit once they are marked as done.

- Click **Close** to save your changes.

How it Works

When a new job intake is done at POS, the software will automatically suggest an ETA based on your settings.



Associates can still manually change this ETA. If you set **Daily Limits** and checked the **Require Override** option, then the “Add Job to a day that is already full” permission is required to book a job that will exceed that daily limit. Otherwise, if that option is not selected, an associate can book a job ETA manually regardless of limits.

You can use the **Calendar** button at the bottom of the intake form to review scheduled jobs.

The screenshot displays the intake form interface. At the top, there's a dropdown for 'WV10' and a 'SHOW ALL ASSOCIATES' checkbox. The main form area includes an 'ETA' field set to '2/7/2022', with checkboxes for 'ETA Is Estimated' and 'Price Is Estimated'. To the right, a summary table shows: Subtotal \$145.00, Tax \$0.00, Total \$145.00, and Due At Pickup \$145.00. On the left, there are buttons for 'Move Task Up', 'Add Job Task', 'Task Details', 'Move Task Down', and 'Cancel / Uncancel Task'. At the bottom, there are buttons for 'Save & New', 'Calendar' (highlighted with a red arrow), 'Add Task', 'OK / Save & Close', and 'Cancel'.

Below the form is a calendar view for February 2022. The calendar shows a grid of days from Sunday to Saturday. Job entries are visible: '1) Overdue Repair Jobs' on Wednesday 02, '1) Repairs Jobs Due' on Friday 06, and '3) Repairs Jobs Due' on Saturday 07. A dropdown menu for 'All Associates' is visible on the left side of the calendar.

Notes

- There is currently a limitation when using **Daily Limits** and taking in multiple jobs on the same transaction. For the purposes of calculating whether it breaks the limit threshold, each transaction counts only as one job.

For example, let's assume you had 2 jobs already scheduled and the daily limit was 3. The next transaction entered includes 2 repair intakes on the same receipt; the system would not prevent you from booking those both for that day and you would end up with 4 jobs scheduled on a day that was supposed to be limited to 3.

- Remember if you want limits based on tasks instead of jobs, you must fill in the ETA for the task under **Task Details** rather than setting the overall ETA on the main intake form.
- Setting a **Daily Limit** of 0 will prevent the software from ever using that day of the week for an ETA.