SmartAccuPay: Client / Job Names Management Manual

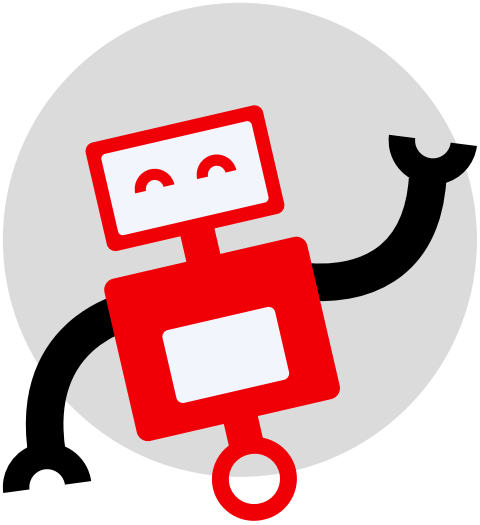


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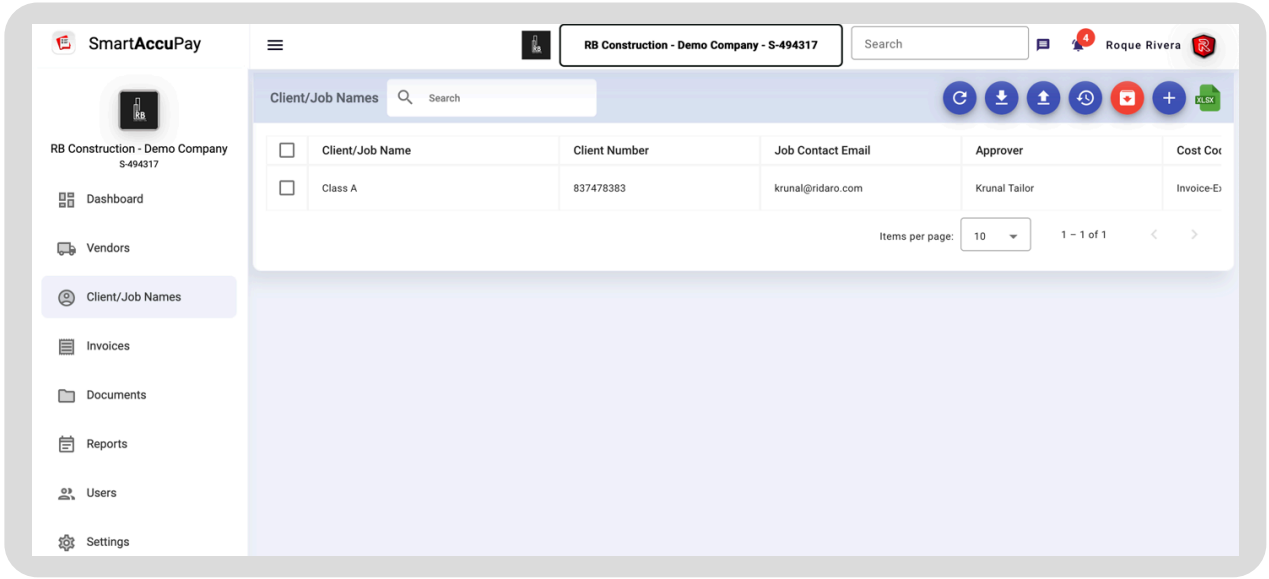
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1. Introduction

SmartAccuPay provides a streamlined process for managing **Client/Job** Names. This functionality helps users organize and maintain client details, job-specific information, and associated records. This guide will walk you through the steps to create, search, archive, and restore **Client/Job** Names.

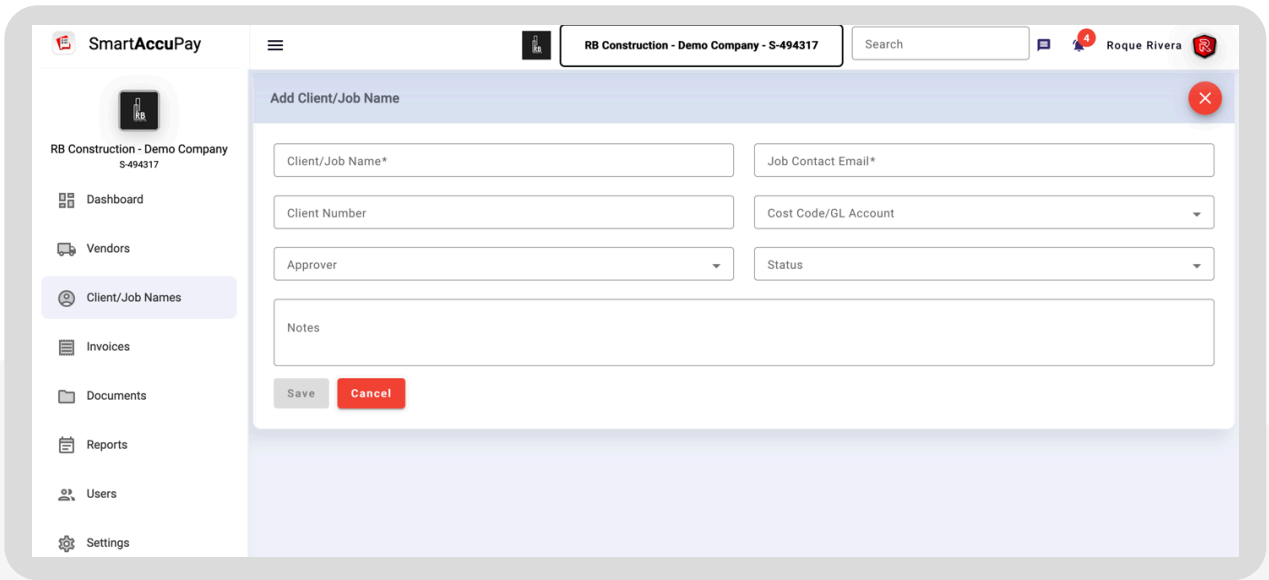
2. Accessing Client/Job Names Management

To access **Client/Job** Names in **SmartAccuPay**, navigate to the **Client/Job** section by selecting **Client/Job** from the left-side navigation menu. This will allow you to **view and manage** your client and job information within the system.



3. Creating a Client/Job Name

To create a new **Client/Job Name**, begin by clicking the **"+" button** to access the Create **Client/Job** Name form. **Enter the required information** including the **Client/Job** Name, Job Contract Email, Cost Code/GL Account, Client Number, Approver, Status, and any relevant notes in the designated fields. After completing all necessary information, **click Save to finalize the creation of the Client/Job Name**, or select **Cancel** to discard the entry.

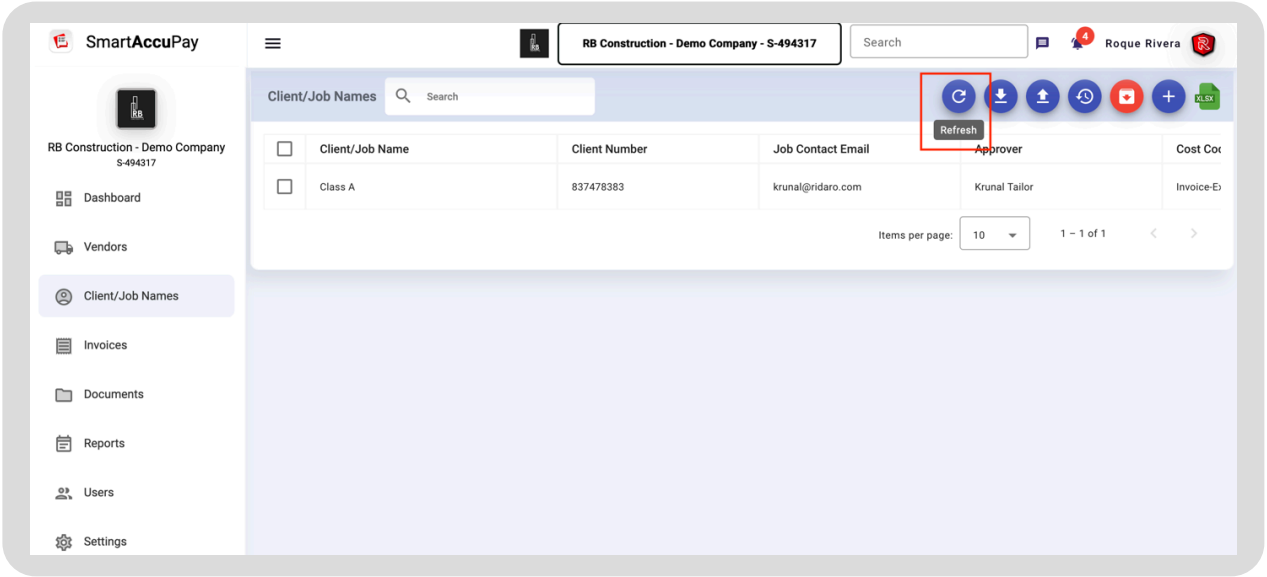


4. Searching for Client/Job Names

To locate a specific **Client/Job** Name within the system, utilize the available search filters. You can search by entering either the **Client/Job** Name or Job Contract Email in the designated search bar. The system will automatically process your query and display the corresponding filtered results based on your input criteria.

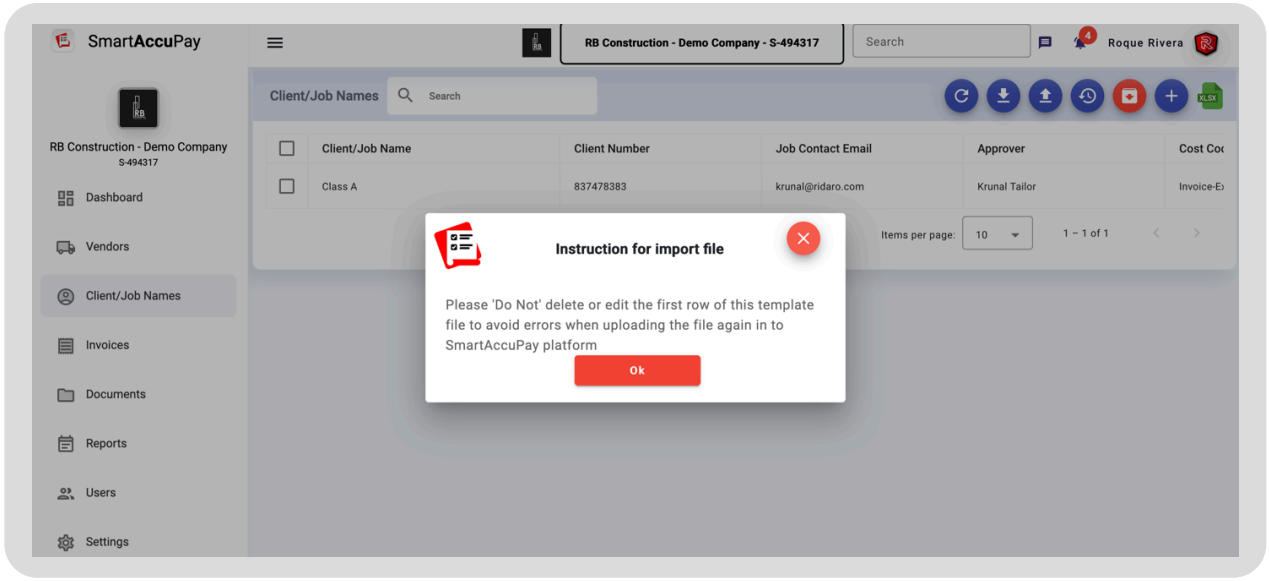
5. Refreshing Client/Job Data

To update the **Client/Job** Names list with the most current information, simply click the "Refresh" button. This action will automatically reload and display the latest available data in the list of **Client/Job** Names.



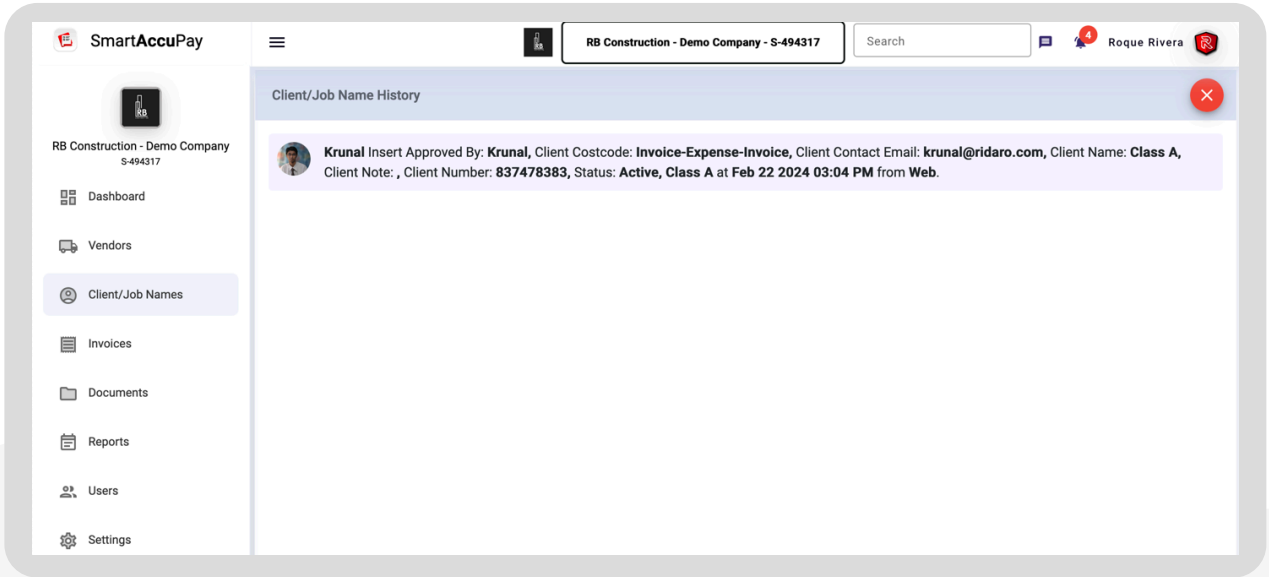
6. Downloading the Client/Job Template

To perform a bulk upload of **Client/Job** Names, download the template by clicking the "Download Template" button to receive an Excel-formatted file. When filling in the template, input the details for each **Client/Job** Name while maintaining the provided format. The first row of headers must remain unaltered as it contains critical formatting information. Once completed, upload the template back to the **SmartAccuPay** platform to complete the bulk import process.



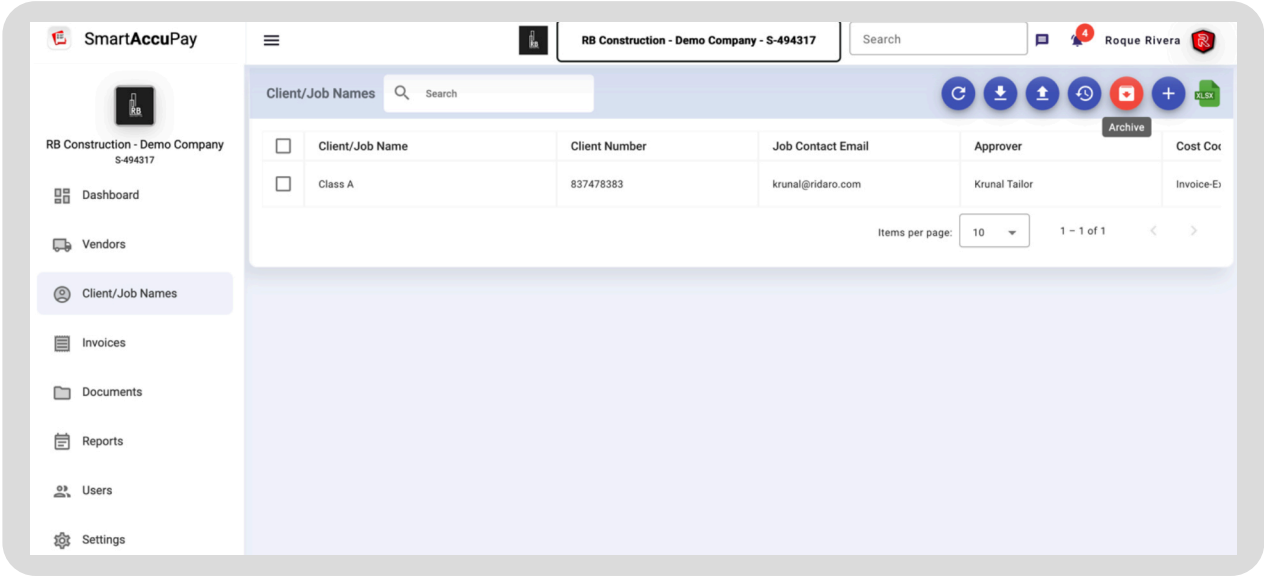
7. Viewing Client/Job History

To access a chronological record of **Client/Job** Name modifications, select the History button. This action will reveal a comprehensive log detailing all actions performed on **Client/Job** entries, encompassing updates, modifications, and removals.



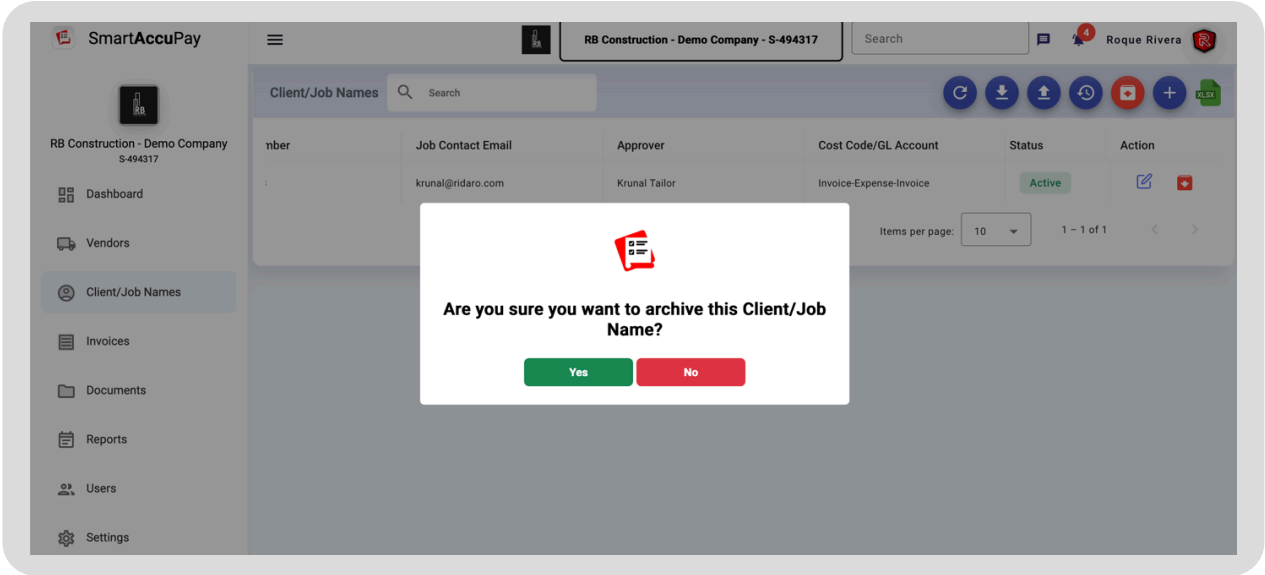
8. Archiving and Restoring Client/Job Names

You can manage your data more efficiently by archiving or restoring **Client/Job** Names. To archive a **Client/Job** Name, simply click the "Archive" button, which will transfer the selected **Client/Job** Name to the archive list for safekeeping.



To Restore an Archived Client/Job Name:

To restore a **Client/Job** Name, locate and click the "Restore" button, which will trigger a confirmation pop-up message. When prompted, select "Yes" to proceed with the restoration or "No" to cancel the process and maintain the current status.



9. Conclusion

Managing **Client/Job** Names in **SmartAccuPay** is simple and helps you stay organized while ensuring accurate job tracking. By following these steps, you can easily create, search, update, and manage **Client/Job** Names in the platform. Need help? Visit our Help section or reach out to our friendly support team for personalized guidance..

