

# How-To: Create your First Job/Visit in ServiceLife and Send to an Engineer

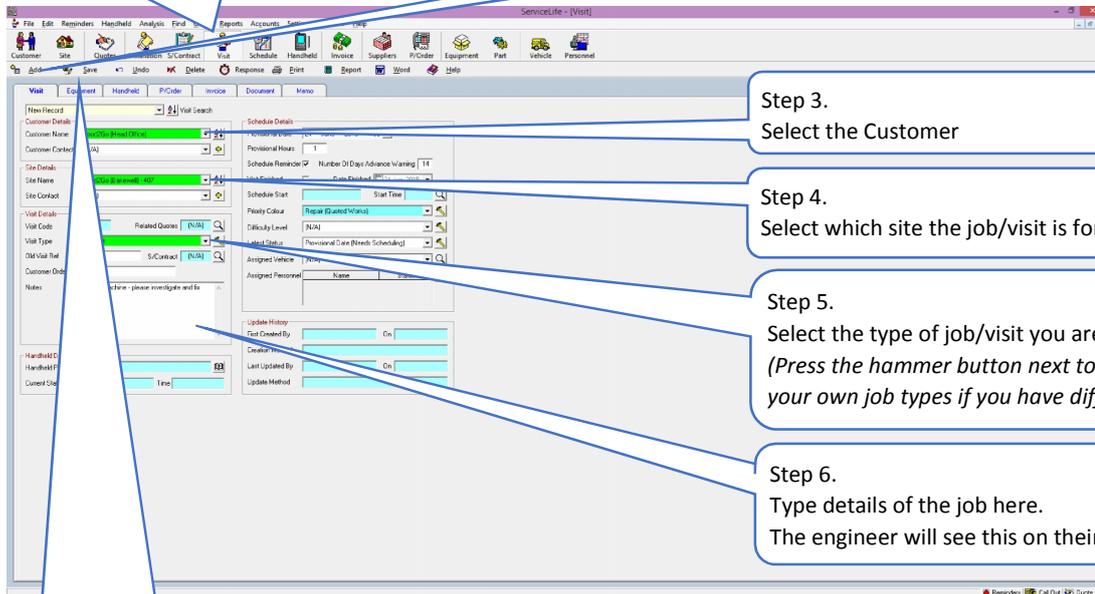
The following steps show you how to create and send a very simple job instruction to one of your engineers. *This assumes you've set up engineers, customers and sites.*

Step 1.

Click on the Visit button at the top of the screen

Step 2.

Press the Add button



Step 3.

Select the Customer

Step 4.

Select which site the job/visit is for

Step 5.

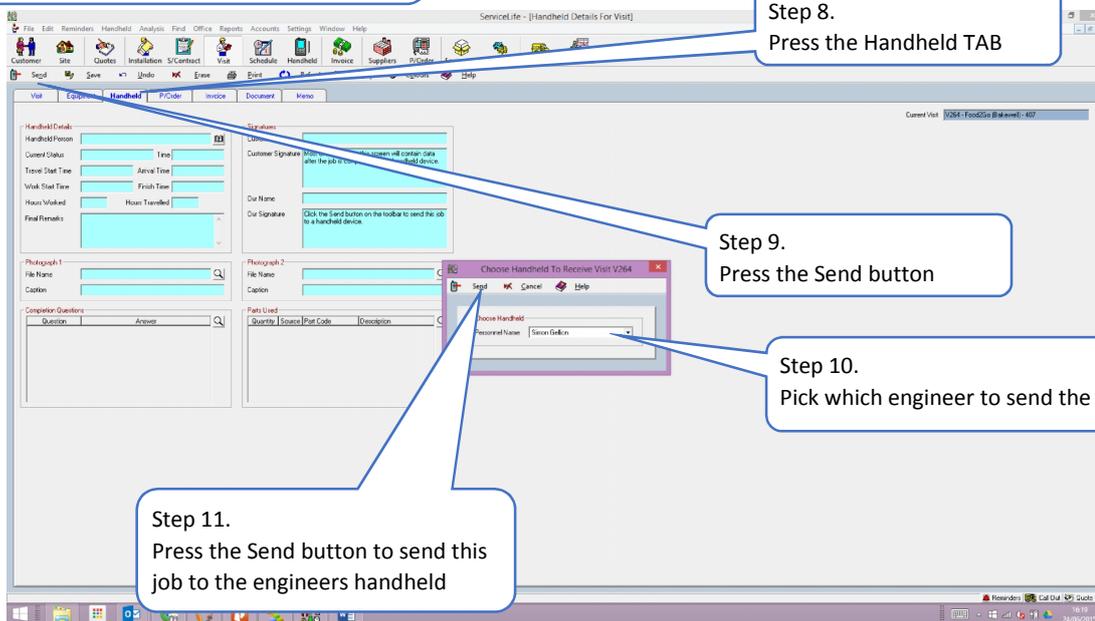
Select the type of job/visit you are creating. (Press the hammer button next to this to create your own job types if you have different ones)

Step 6.

Type details of the job here. The engineer will see this on their handheld.

Step 7.

Press Save to add this job into ServiceLife  
You'll be given a unique number for this job



Step 8.

Press the Handheld TAB

Step 9.

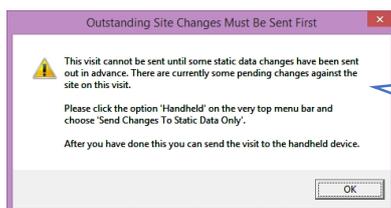
Press the Send button

Step 10.

Pick which engineer to send the job / visit to

Step 11.

Press the Send button to send this job to the engineers handheld



**! Do you get this message when you press Send?**

What it means is you've added new customers, sites and/or equipment. This information needs to be sent out to the handhelds before you can send the job.

Just click the WORD Handheld on the very top menu of ServiceLife. Then choose Send All Static Data -> To Every Handheld. You'll also need to press Yes after to confirm this action.

You can then retry step 11 to send the job out.