

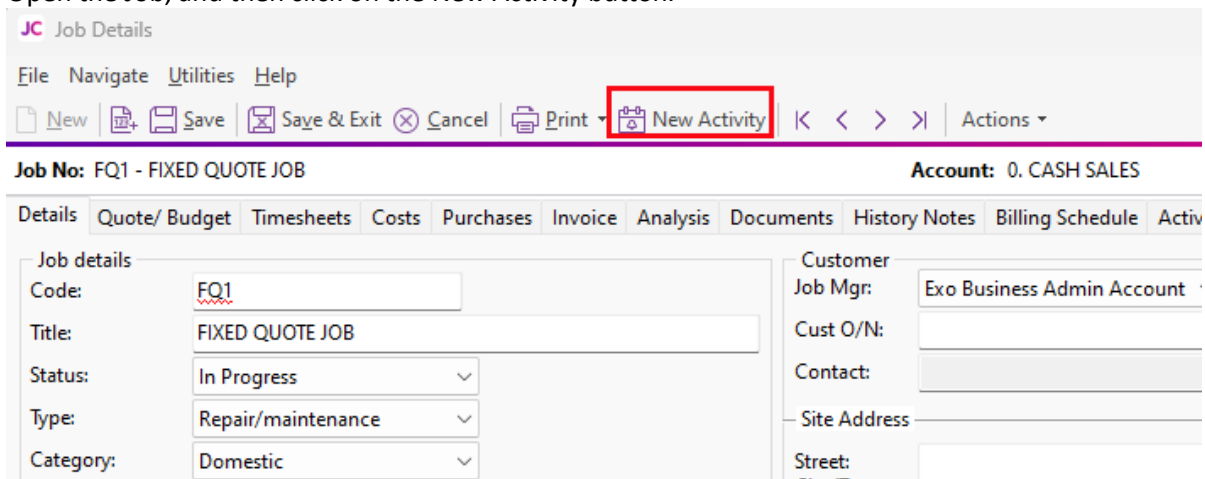
## How to use Activities in MYOB Exo Job Costing

### Overview

The following steps show how to set up an Appointment or Task from within a Job. This will then show in the Exo Task Scheduler.

### Step 1 – Click on the New Activity button

Open the Job, and then click on the New Activity button.



Job Details

File Navigate Utilities Help

New Save Save & Exit Cancel Print **New Activity** Actions

Job No: FQ1 - FIXED QUOTE JOB Account: 0. CASH SALES

Details Quote/Budget Timesheets Costs Purchases Invoice Analysis Documents History Notes Billing Schedule Activ

Job details

Code: FQ1

Title: FIXED QUOTE JOB

Status: In Progress

Type: Repair/maintenance

Category: Domestic

Customer

Job Mgr: Exo Business Admin Account

Cust O/N:

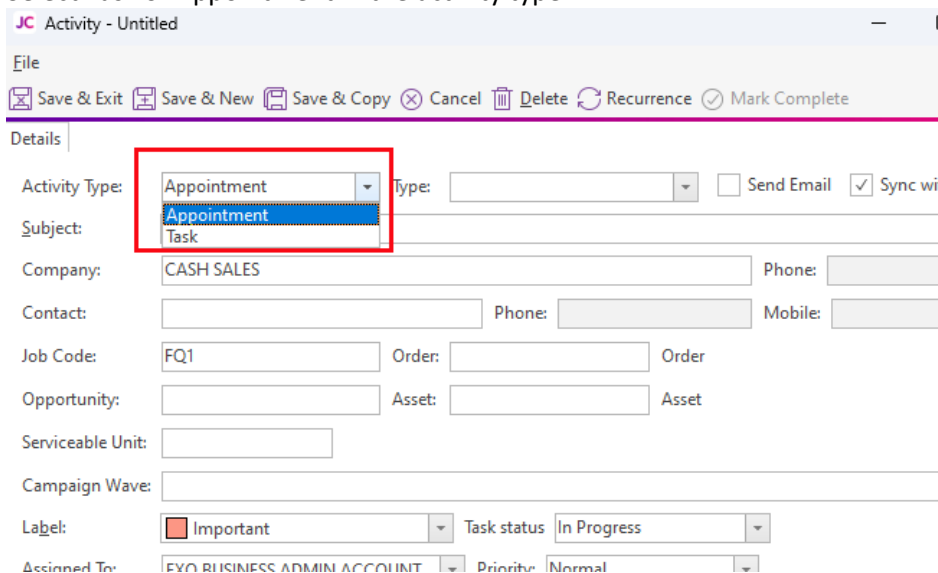
Contact:

Site Address

Street:

### Step 2 – Fill in the Activity screen,

Select Task or Appointment in the activity type



Activity - Untitled

File

Save & Exit Save & New Save & Copy Cancel Delete Recurrence Mark Complete

Details

Activity Type: Appointment Type: Send Email Sync with

Subject: Appointment Task

Company: CASH SALES Phone:

Contact: Phone: Mobile:

Job Code: FQ1 Order: Order

Opportunity: Asset: Asset

Serviceable Unit:

Campaign Wave:

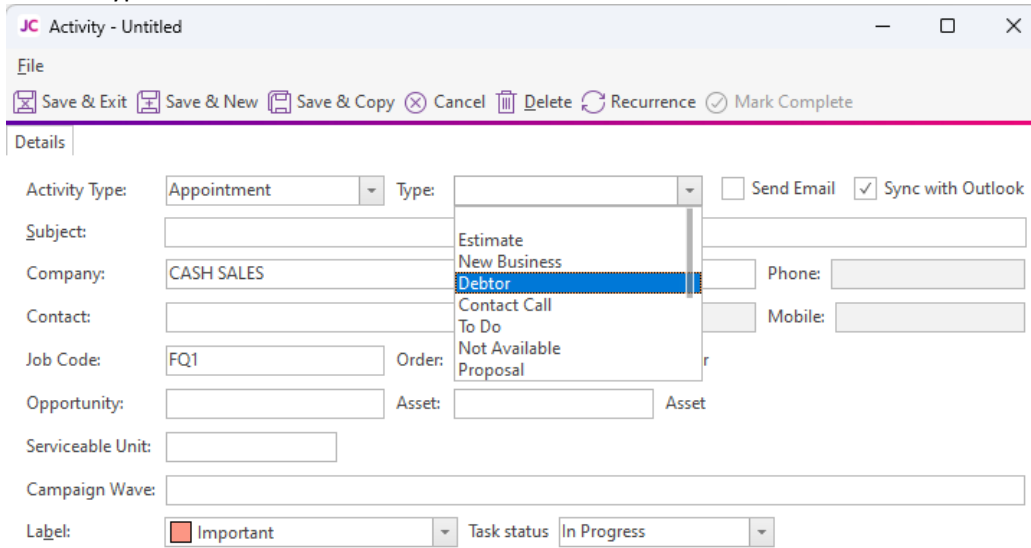
Label: Important Task status: In Progress

Assigned To: EXO BUSINESS ADMIN ACCOUNT Priority: Normal

The information contained in this document is intended to be a guide for using your software. It is not accounting, bookkeeping or payroll advice. You should seek advice or clarification from your professional advisor in respect of these matters.

# Take your business to the *next level*

## Choose type



Activity Type: Appointment Type: [dropdown]  Send Email  Sync with Outlook

Subject: [text box]

Company: CASH SALES Phone: [text box]

Contact: [text box] Mobile: [text box]

Job Code: FQ1 Order: [text box]

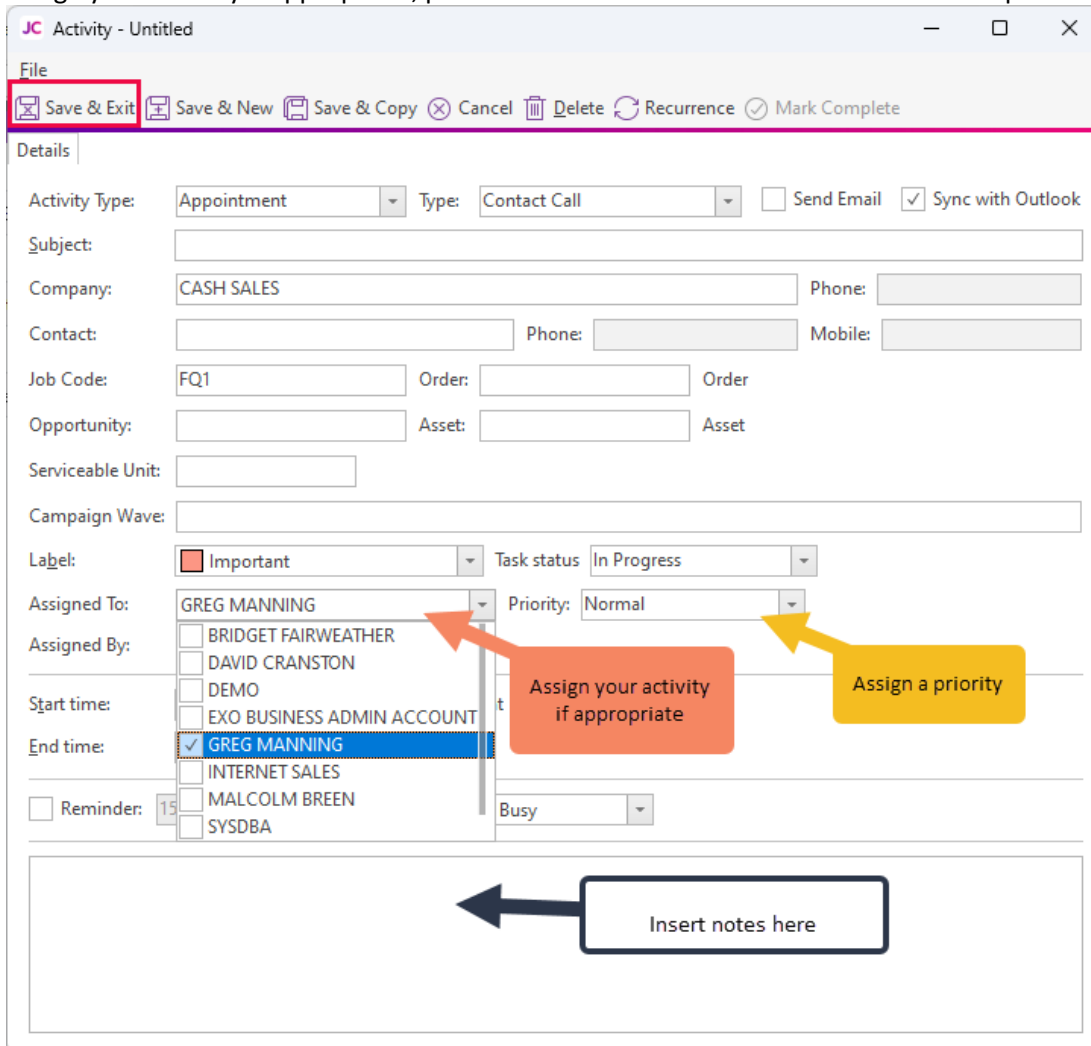
Opportunity: [text box] Asset: [text box] Asset

Serviceable Unit: [text box]

Campaign Wave: [text box]

Label:  Important Task status: In Progress

Assign your activity if appropriate, prioritize and add notes. Save and Exit when complete.



Activity Type: Appointment Type: Contact Call  Send Email  Sync with Outlook

Subject: [text box]

Company: CASH SALES Phone: [text box]

Contact: [text box] Phone: [text box] Mobile: [text box]

Job Code: FQ1 Order: [text box] Order

Opportunity: [text box] Asset: [text box] Asset

Serviceable Unit: [text box]

Campaign Wave: [text box]

Label:  Important Task status: In Progress

Assigned To: GREG MANNING Priority: Normal

Assigned By:  BRIDGET FAIRWEATHER  DAVID CRANSTON  DEMO  EXO BUSINESS ADMIN ACCOUNT

Start time: [text box]

End time:  GREG MANNING

Internet Sales  MALCOLM BREEN  SYSDBA

Reminder: 15 Busy [dropdown]

Insert notes here

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