# **Oval Accounting – Job Order Rules Training Module**

Version: 0.1

Date: 15th December 2020

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| The purpose of this document is to provide training guidance for the Job Order Rules feature within Oval Accounting. It should be used in conjunction with Oval Accounting.  |

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## Change History

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| Version | Date | Changes |
| 0.1 | 15th December 2020 | Initial Document |
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# Introduction

The purpose of this document is to provide training for the Job Order Rules feature within Oval Accounting.

Use cases will be used to depict the scenario.

## Use Case 1

Create a new Job Order Rule.

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| Step Number  | Steps  | Expected Outcome  |
| 1 | Navigate to the Job Order Rules tab (Oval Administration).  | Job Order Rules list displayed.  |
| 2 | Click on New.  | New Job Order Rule popup displayed.  |
| 3 | Enter the Job Order Rule Name.  | Job Order Rule name entered. |
| 4 | You can then select the Salesforce Object the job order rule applies to.  | Salesforce Object selected.  |
| 5 | Enter the evaluation order.  | Evaluation order entered.  |
| 6 | Select the Company Entity the rule applies to.  | Company entity selected.  |
| 7 | Select the Is Active? Checkbox.  | Checkbox ticked. |
| 8 | Click on Save. | Job Order Rule setup.  |
| 9 | Click on the New Job Order Rule Conditions button.  | New Job Order Rule Condition popup displayed.  |
| 10 | Enter the evaluation order.  | Evaluation order entered.  |
| 11 | Enter the Filter Path field.  | Filter Path Field entered.  |
| 12 | Enter the Filter Field Value.  | Filter Field Value entered.  |
| 13 | Enter the Filter Value Field Path.  | Filter Value Field Path entered. |
| 14 | Click on save.  | Job Orde Rule Condition setup. |
| 15 | Click on new job order rule action.  | New Job Order Rule Action popup displayed.  |
| 16 | Select record type charge or cost.  | Charge or cost selected.  |
| 17  | Click on next.  | Job order rule charge or cost popup displayed.  |
| 18 | Complete the information ensuring is active? Is ticked.  | Information completed.  |
| 19 | Click on save.  | Job order rule charge setup. |