# **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. |