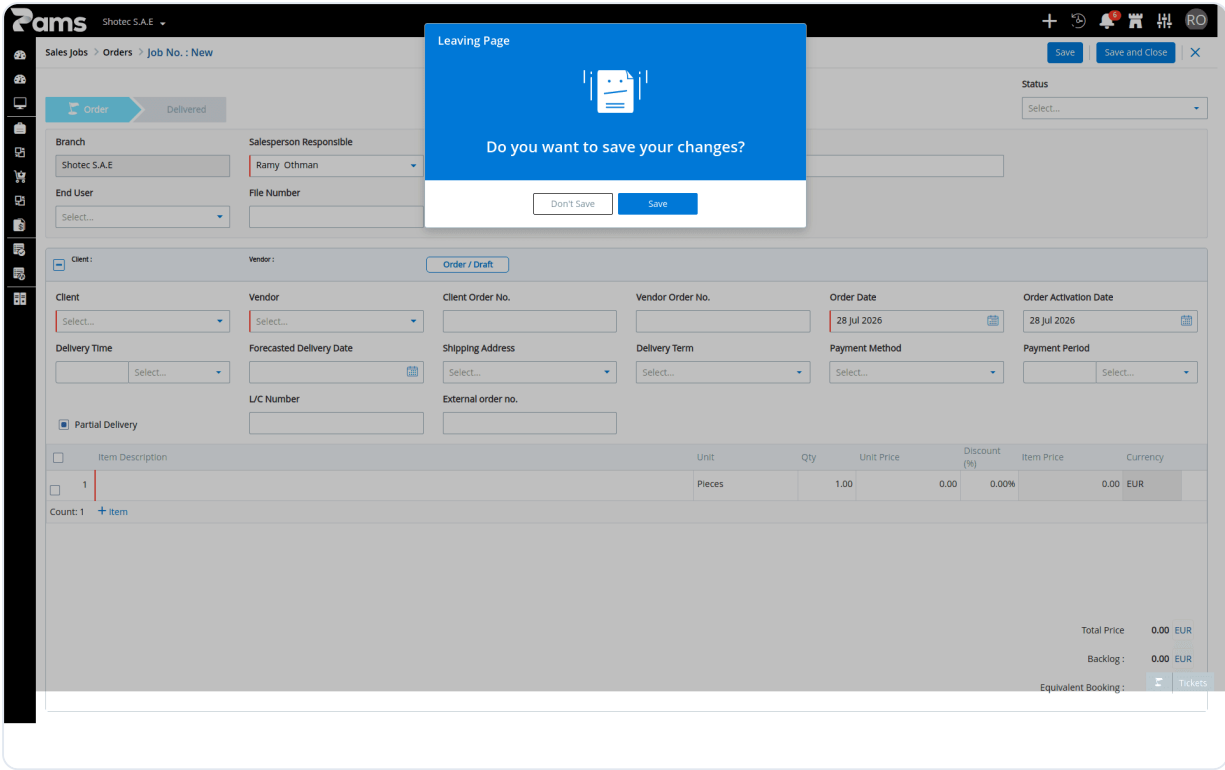


NewInstantJob

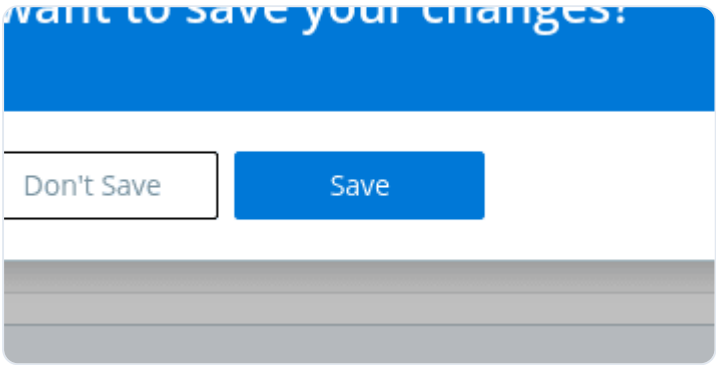
July 29, 2026

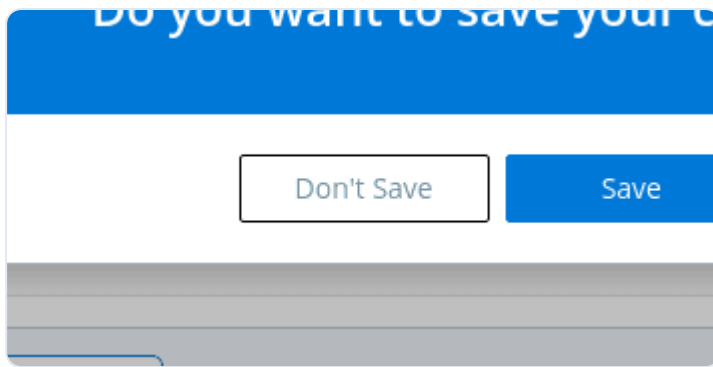
NewInstantJob

Applications > projects management > List



NewInstantJob





Overview

Use NewInstantJob to create and maintain a draft job record in Projects Management. This record is used by project-focused users who need to select related information, attach supporting files, and save the job for further work. The available stage is **Client : Vendor : Order / Draft**, indicating that the job is currently maintained as a draft.

Workflow

1. Open the project work area from **PM** and open the NewInstantJob list or record screen.
2. In the **Client : Vendor : Order / Draft** stage, review the draft job information before saving it. Use the **Select...** field when you need to choose an available item for the job.

Note: The screen shows draft records with quantity, pricing, percentage, and currency values. Review the displayed values before you save or close the record.

3. Decide whether the job needs supporting documents.
 - To add documents, use **Attach** and select files for the **files[]** field.
 - To choose an item from the available selection interface, use **Select**.
 - Confirm the selection with **Ok**, where applicable.
4. Decide how to preserve the draft.
 - Select **Save** to keep the current changes and continue working on the record.
 - Select **Save and Close** to keep the changes and close the record.
 - Select **Cancel** when you do not want to continue with the current action.

- If the system offers **Don't Save**, select it only when you intend to leave without retaining the current changes.

Warning: Use **Don't Save** only when you are certain that the changes and attachments are not required. Unsaved selections and files may not be retained.

5. If the draft is no longer required, select **Delete**. Use this action only after confirming that the record should be removed.
6. Where required for the job, select **Tickets** to access the ticket-related action available from the NewInstantJob screen.

Client : Vendor : Order / Draft

This stage contains NewInstantJob records that are being prepared as drafts. You use this stage to select the relevant available item, review the displayed quantity and financial values, add files, and save the draft record.

The available controls do not identify a specific action that moves a record out of this stage. Use **Save** or **Save and Close** to retain the draft information after review.

Examples

A project manager needs to prepare a draft job for one piece of work before related project activity continues.

1. Open NewInstantJob from **PM**.
2. In **Client : Vendor : Order / Draft**, use the **Select...** field to choose the required available item.
3. Select **Attach** and add the supplier document or other supporting file to **files[]**.
4. Review the displayed quantity, amount, percentage, and EUR values for the draft.
5. Select **Save** if further review is needed, or select **Save and Close** when the draft is complete for the current session.
6. If the selected item or attached document is incorrect before saving, use **Cancel** or **Don't Save**, as appropriate, rather than retaining an incomplete draft.

Tips

Tip: Attach supporting files while the record is still open so that the draft and its documents can be reviewed together.

Tip: Use **Save** when you expect to make further changes; use **Save and Close** when the current draft review is complete.

Troubleshooting

Symptom	Likely cause	Fix
The required item is not yet associated with the draft.	No selection has been confirmed.	Use Select... , choose the appropriate item with Select , and confirm with Ok where available.
A document is missing from the job draft.	The file was not attached before the record was saved or closed.	Reopen the draft, use Attach , add the file to files[] , and select Save .
Changes are lost after leaving the record.	Don't Save was selected, or the record was closed without saving.	Re-enter the draft, make the required selections again, and use Save or Save and Close .
The draft should not remain in the list.	The record is no longer required.	Select Delete only after confirming that the draft should be removed.

Related pages

- **NewDirectOrder**
- [projects management — Overview](#)
- [projects management — Learning Path](#)
- **List**
- [projects management](#)
- [Buyout To Order](#)
- [List](#)
- [orders](#)
- [delivered orders](#)
- [production order](#)
- [Shipping Order](#)