



## Create Draft Job Docs to email customers or generate PDF for internal review.

Follow the steps in [Creating Job Docs](#) to step 13.

Make sure to click **YES** to "Do you want to fill in the Job Doc in the Web App"

1. Fill in your Job Doc as required and then click **Create Draft**.

Licenses, Permits, Competencies Required: (tick items relevant to this task and site)

<input checked="" type="checkbox"/> Confined Space	<input type="checkbox"/> Work at Heights	<input type="checkbox"/> Excavation	<input type="checkbox"/> Hot Work	<input type="checkbox"/> Radiation
<input checked="" type="checkbox"/> White Card	<input type="checkbox"/> EWP	<input type="checkbox"/> Electrical License	<input type="checkbox"/> Rescue and Resuscitation	<input type="checkbox"/> Network Access

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Licenses, Permits, Competencies Required: (tick items relevant to this task and site)

<input checked="" type="checkbox"/> Manual handling	<input type="checkbox"/> Working at Heights	<input type="checkbox"/> Risk of Electric Shock	<input type="checkbox"/> Slips, Trips and Falls	<input type="checkbox"/> Housekeeping
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Submit
1
Create Draft

The following buttons will now be available:

2. Reassign
3. Email the Job Doc
4. Print – this produces a PDF report
5. [Add Steps](#)
6. Setup/Edit the Form.
7. Edit details e.g. Customer, Supervisor etc.
8. Delete.



9. Select from the Customers email addresses.

10. Click **SEND**.

11. The status will change to Pending.

Send Email ×

To

8
Other - accounts@safetyminder.co
×
▼

Subject

74 - SWMS - Under the Sea – 8956 – Test More Stuff

9
SEND
CANCEL

Doc No	Job No	Project/Descripti...	Supervisor	Customer	Work site	CreationDate	Status	
74	8956	Test More Stuff	David AASign	Other	Under the Sea	26/05/2021	10	Pending

12. The customer will receive an email with two links:

- a. Opens the job doc for the user to review and either Accept or Reject.
- b. Opens a PDF version of the form complete with headers and footers

The link will only be active for 24 hours.

After the user clicks Accept or Reject it will show the logon page for SafetyMinder.

### 104 - SWMS - Park State Playground – 0410HT – Test More

noreply@safetyminder.com.au

• If there are problems with how this message is displayed, click here to view it in a web browser.

Sent: Mon 23/08/2021 7:18 AM

To: Heidi Thonig

From SMDemo

Project Name: Test More

Project Address: Park State Playground

Dear Heidi

Please click the link to see our proposed [SWMS Plumbing](#) for 0410HT-Test Playground

Please open the document, review and accept or reject.

If rejected, please provide feedback on changes required in the box provided [Print Job](#) **b**

**NOTE: the link will only be active for 24 hours.**

Ham [accounts@safetyminder.com.au](mailto:accounts@safetyminder.com.au)

SMDemo

P.O. Box 47 Magill

Licenses, Permits, Competencies (must be written into the Sign-On page of SWMS)		Hazardous Substances (list and attach SDS to SWMS)	
Electrical License	<input checked="" type="checkbox"/> Rescue & Resuscitation		Work Health and Si
Industry Card	<input checked="" type="checkbox"/> High Risk Work License	Dynamite	Work Health and Si
Traffic Control	<input type="checkbox"/> Work at Heights		Electricity Act 1996;
Confined Space	<input type="checkbox"/> High Voltage Work		Code of Practice: H
Permit to Work	<input type="checkbox"/>		
Other	<input type="checkbox"/>		

Please provide specific details for rejecting this document  
please clarify PPE to be used

**14**

**15** SEND

**16** ACCEPT REJECT **13**

13. When the Customer clicks REJECT:

14. A box pops up for them to type a reason for the rejection of the document and:

15. Clicks SEND. An email is sent to the web user with this information & the status changes to Rejected.

16. When the Customer clicks ACCEPT the status changes to Draft and an email is sent.

Dear Heidi Thonig

74 : SWMS WORKING AT HEIGHTS – GENERAL (LADDERS, EWP, SCAFFOLD Stuff at Under the Sea  
From: Other – Purple Submarine Ltd

**13**

Has been rejected for the following reason: please clarify PPE to be used

Dear Heidi Thonig

74 : SWMS WORKING AT HEIGHTS – GENERAL (LADDERS, EWP, SCAFFOLD Stuff at Under the Sea  
From: Jo Block – Purple Submarine Ltd

**16**

Has been accepted

D...	Jo...	Project/Des...	Supervisor	Customer	Work site	CreationDate	Status
74	8956	Test More Stuff	David AASign	Purple Submarine Ltd	Under the Sea	26/05/2021	Rejected <b>13</b>
D...	J...	Project/Descri...	Supervisor	Customer	Work site	Creation...	Status
74	8956	Test More Stuff	David AASign	Purple Submarine Ltd	Under the Sea	26/05/2021	Draft <b>16</b>

The process repeats itself until the customer clicks ACCEPT. See the flowchart below.

Then you click #5  (Setup) from above and click SUBMIT this assigns the job doc to the selected Supervisor and sends them a notification.

The Job Doc is completed and signed off in the mobile app under [Job Docs](#)



