

# Job Management Overview and Topics

Last Modified on 01/11/2023 11:14 am EST

The Job Management module is probably the most complex module in the entire Sedona Office application and requires the most setup and planning prior to implementing.

The term Jobs in SedonaOffice typically refers to new system installations or major customer system upgrades. Whether your company will be expensing costs to a Job as they occur or expensing costs using work in process accounts, the setup is very important to accomplish the desired operational and financial reporting results. Refer to the Job Costing Setup topic for a better understanding of how to setup your system for processing jobs.

Your company may choose to use some or all of the features included in this module, however there are some required items for basic Job processing.

Below is a list of functions and features of this module; items required for basic job processing are indicated with an asterisk.

- Work Order entry \*
- System Information \*
- Job Approvals (click on the link for information on the functionality of Job Approvals)
- Job Tasks \* (a listing of the major milestones required to complete the installation)
- Installation Charges \*
- RMR Charges (Recurring Monthly Revenue)
- Materials
- Job Costing
- Commissions
- Custom Fields
- Documents
- Job Scheduling
- Appointment Summary Scheduling
- Payroll Timesheets
- Job Timesheets
- Order Parts (Automated Purchase Order creation)
- Job Notes

When a new job is created, two of the required fields on the first data entry form, Work Order; are Job Type and Install Company which will determine how a Job is processed and costed.

These two setup choices will determine the following major Job processing decisions:

- The method used for invoicing the customer
- Lump sum amount at the end of the job or progress invoicing.

- Invoice percentages of the total install charges at intermediate steps.
- The Cost of Goods Sold G/L accounts to be used.
- Whether Inventory Parts will be expensed when issued to the Job or will be posted to a WIP (work in process) account until the Job Invoices and/or is closed.

□ Once all Job setups have been completed, it is a good idea to copy your live company into a Sandbox company to practice with your setup values. This will give you the opportunity to create and process jobs of various types and follow the transactions through to the general ledger to validate whether your setup choices will produce the desired results.

### **New Job Creation Flow Chart**

When creating a new Job, there are several data entry forms to be completed. The diagram below illustrates the typical new Job data entry. If your company is using QuoteWerks, all information except the Costing Estimate and Commissions will automatically fill into the data entry forms from the QuoteWerks sales order.

□

### **Job Processing Flow Chart**

The diagram below illustrates the typical Job flow when using all available Job processing functions.

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Follow the links below for more information related to processing Jobs.