

# Job Phases Functionality

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## Job Phases Overview

Job Phases was designed primarily as a resource-planning tool for Job labor and materials. Job Phases are also used to determine which billable Install charges and/or Parts may be invoiced and when. Each Job Type setup must contain at least one Phase. If your company will not be using multiple Phases on a Job Type, when creating new Jobs, the one default Phase will be automatically assigned to each part on the Materials List, each Install Charge line, and each Job Task line.

You have the ability to setup multiple available Job Phase Codes on some Job Types and use just the one default Job Phase Code on other Job Types. Typically, Job Types that are more complex are good candidates for multiple Job Phases to better manage the ordering of parts for a Job. If a Job Type is setup with only one Job Phase Code, after a Job is created, you may manually add additional Job Phase Codes to the Job (Job record/Tools Toolbar/Phases (button)).

## Adding Phase Codes to a Job

When creating a new Job, you may use the Phase Codes assigned to the Job Type, or you may remove existing or add additional Phase Codes to the Job which have been setup in the Job Phases setup table.

Remember, each Job must have at least one Phase Code.

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## Job Task List/Install Charges Phase Codes

On each Job Task line, a field labeled Invoice, is available for selection. If the Invoice option is selected, once this Job Task has been approved job, the Job will appear in the job invoicing queue. If you are performing progress billings on the Job, you may select the Invoice option on multiple job task lines.

When a Task line is flagged for Invoicing and you are invoicing for Install Charge Line(s) and/or Parts, the Phase Code on the Invoicing Task Line must have a corresponding Install Charge Line and/or Parts with the same Phase Code to be able to invoice the Job.

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## Phase Codes on the Job Materials List

Using Phase Codes on the Job Materials List was designed to indicate which parts would be needed at certain phases of the Job.

At the top of the Job Materials is a checkbox labeled Show Phases. When this check box is selected, the first column in the Parts List will display the default Phase Code for the Job Type. If more than one Phase Code has been setup for the Job Type, you may select the appropriate Phase Code for each Part Line item. For example, the Job Type has two default Phase Codes, Pre-wire and Installation. On the parts that will be needed during the Pre-wire phase of the Job, the Prewire Phase Code would be selected. The remainder of parts that will be used during second phase of the Job would have the Installation Phase Code selected. When ordering parts within the Job record, you will be prompted to select the Job Phase for which a purchase order is being created.

If one or more of the parts listed on the Materials List will be invoiced, the Phase Code of the Part must have a corresponding Phase Code on a Job Task which is flagged for Invoicing.

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### **Ordering Parts by Phase Code**

If a Phase Code has been assigned to any part on the Job Materials List, when using the automated Purchase Order creation option from a Job record, a form will be displayed prompting you to select the Job Phase for which parts are being ordered. Once a Phase is selected, you are presented with the list of Vendors from which to select for creating the Purchase Order.

If the job will take weeks or months to complete, you probably do not want to bring in and have to pay for all of the job parts that will not be need for a long while. This helps with the company's cash flow.

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