Job Toolbar-Work Order

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The Work Order is the first data entry form for a new Job and contains key fields which control how the Job will be processed and costed. There are four key fields on this form which are required to be able to save and advance to the second Job setup form: Job Type, Install Company, Salesperson and Sold Date.

- The Job Type determines the following:
- Which tasks will be loaded into the Job Task list
- Material Cost of Goods Sold Account
- The default income and expense posting Category
- Work in Process accounts for Materials and Miscellaneous Expenses
- The Billing method for the Job; lump sum amount or progress invoicing, percentage invoicing or holdback invoicing
- Labor, Overhead and Commissions posting G/L accounts (Optional overrides for the Install Company and Setup Processing setup)
- Commission Types
- Approvals required (only used if Job Approvals have been activated)
- The Install Company determines the following:
- Work in Process accounts for Materials and Miscellaneous Expenses
- Labor and Overhead posting G/L accounts (will be overridden by any selections on the Job Type setup)
- Method of generating Labor Timesheets if scheduling with the Appointment Summary
- The Salesperson selected will be used for calculating and applying commissions to the Job. Several Job reports found on the Report Manager have options to group by the Job Salesperson.
- The Sold Date is used as a filter on most Job Management reports.

All data entry fields and function buttons on the Work Order form are defined below.

Work Order Data Entry Fields & Function Buttons

There are several data entry fields on the Work Order form, only four of these are required data entry fields by the User. Once you understand the intended use of each field, you will develop your own internal policies on how to fill in this form.

- Job Number - This field most likely will auto-fill withe the next Job Number. If your company is not allowing for auto-numbering, fill in according to your company policies and procedures. The Job Number is the main identifier for a Job. When associating expenses to a Job, the Job Number is the linking value.
- Job Type - Select from the appropriate choice from the drop-down list. The Job Type controls many elements of

the job both operationally and from an accounting standpoint. Once the Job is created, the Job Task List will fill with the default values setup for the Job Type. If you selected the incorrect Job Type and then change it to the correct type, the Job Task List will not change to the Task List of the new Job Type.

- Description - This will auto-fill with the default description on the Job Type setup; you may override this if desired. This field will allow up to 50 characters.
- Tax Group - The Tax Group will auto-fill with the tax group assigned to the Site for the Job. This should not be changed unless the invoiced charges for the Job will be taxed differently than the default. User permissions are required to change the Job Tax Group.
- Branch - The Branch will auto-fill with the branch code assigned to the Site for the Job. User permissions are required to change the Job Tax Group.
- HoldBack% - If your customer requires that a certain percentage of each invoice be deducted, then enter that percentage in whole numbers; otherwise leave this set to zero. Holdbacks are often referred to as Job Retainage.
- Install Company - Select from the appropriate choice from the drop-down list. This is the company responsible for performing the installation work.
- Installer - This field is for selecting the Lead Installer for the Job. When clicking on the drop-down arrow, the list of all Installers/Technicians are available from with to select. This field is optional.
- Permits Required - If this box is checked, three additional fields will be available; Permit 1, Permit 2, and Permit 3. These are text fields for typing in any types of permits required for the Job. This information will print on the Job Ticket.
- Prevailing Wage - If this is a prevailing wage type Job, make a selection from the drop-down list; otherwise you may skip this field.
- Project Manager - This is the employee responsible for managing the Job. Make a selection from the drop-down list. If your company does not use project managers, skip this field.
- Salesperson - Make a selection from the drop-down list. This will be the employee for which commissions will be calculated for the Job. This is a required field.
- P.O. Number - If your customer has provided a Purchase Order Number for billing purposes, enter that value in this field. This number will print on all invoices created for the Job. Up to 20 characters may be entered into this field.
- Sold Date - This is the date the sales was closed by the Salesperson; typically the contract date. This is a required field.
- Projected Start Date - This is the date the Job is expected to begin. This date is displayed in the Job Queue and is used in SedonaSchedule for scheduling appointments.
- Projected End Date - The date the Job is expected to be completed.
- Notes - This note field is considered "Mission Critical" information. You may enter up to 256 characters into this field. This information will print on the Job Ticket.

At the bottom of the Work Order form are several function buttons - definitions are listed below.

- Change Customer - If the incorrect Customer was selected when creating the Job, you may click this button to search for the correct Customer. Once an Invoice has been created for the Job, this button will no longer be available.
- Change Site - If the incorrect Site was selected when creating the Job, you may click this button to search for the correct Site linked to the Customer. Once an Invoice has been created for the Job, this button will no longer be available.
- Sales Reversal - This button is used if a Job has been Invoiced and then the Job is cancelled. User permissions are required for access to this button.
- Apply - Clicking this button saves any changes made to the Work Order form.
- Create Template - This button is used to create a Template for use in creating future jobs. For detailed information on Job Templates, click on the link.