Job Toolbar-Tasks

Each Job Type is linked to a list of Job Tasks. The Job Tasks are typically the major milestones that need to be completed to install a system.

As each Task is completed, the responsible person in your company will approve the Task which will advance the Job Status to the Status assigned to the next Task in the list. Job Tasks are approved by highlighting the Task row, right-clicking and selecting the Approved option. User permissions are required to approve Tasks and the Tasks which are allowable for the User are setup in the Job Tasks setup table in SedonaSetup.

On each Job Task line, two fields are available for selection; Invoice and Sequence Locks Job. If the Invoice option is selected, once this 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.

If the Sequence Locks Job option is selected, once this task has been approved on the job, the Job will be put in "Lock" mode and change order must be created to add, remove or reduce part quantities, install charges, recurring charges or commissions for the job.

A comments field is available for each Task line. A User may type in and save pertinent information for a task if the User has permissions to edit tasks. If a comment is entered on a task line that is flagged as an invoicing task, the comment entered will be transferred into the Invoice Memo field when the Job is invoiced.

If additional Tasks are needed, a User with the appropriate permissions may add any number of task lines. Each Task must be unique to the Job Task List; i.e. if Schedule Install is already on the Task List, this same task may not be added as an additional task line.

If needed, unapproved tasks may be moved up or down in the sequence of tasks to be performed. Highlighting a Task line then clicking the green up or down arrows to the right of the form will move the highlighted task.

Each data entry field will be explained below.

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Job Tasks Data Entry Fields

When a new Job is created, a default Task list will auto-fill into the Job. Users with appropriate permissions have the ability to modify the this list if needed; Tasks may be added, removed, or re-arrange the order by clicking on the green arrows to the right of the Task list.

- Job Task - This field briefly describes what needs to be accomplished at this point in the Job.
- Job Status - Describes where in the process of being complete is the Job; often times the words used for Job Statuses describe the department responsible for completing the Task.
- Phase Code - This will default to the first Phase Code assigned to the Job Type. When clicking on the drop-down list, if there is more than one choice available, the Phase Code may be changed. If the Task line is flagged as an Invoicing Task, the Phase Code selected on Install Charges must match the Phase Code on the Task line.
- Labor Days - If the Task line involves performing a labor operation, you may enter a number of days required to

complete the Task. For example the Task Line is Install Equipment, the Labor Days entered could 1.5 (1 1/2 days) or any other number in increments of half-days. This field is used in conjunctions with the Job Planner in SedonaSchedule. This field is optional.

- Schedule Date - This is the requested schedule date. The person responsible for creating Job Appointments will be able to see this requested date in the SedonaSchedule Open Jobs list. This field is optional.
- Invoice - If this box is checked, this indicates that once the Task is approved, the Job is ready to be invoiced and will automatically appear in the Job Invoicing Queue.
- Sequence Locks Job - If this option is checked, once this Task is approved, the Job will become locked. Once a Job is locked, no changes may be made to Install Charges, the Materials List, the RMR Charges, Commissions, and several fields on the Job Work Order form. Any additions or reductions to billable charges or commissions will require a Change Order be created.
- Memo / Invoice Memo - This field may be used to enter a note regarding the Task this is for internal company use unless the Task is flagged as an Invoicing Task; if so, any text entered into this field will populate the memo field when creating the Job Invoice. For Invoicing Tasks, this is typically billing instructions for the person creating the Job Invoice. The person creating the invoice may modify or remove this text when creating the Invoice.
- Apply Template Button - This button is used if you want to import the Task list from one of your company Template Jobs.

For more detailed information on Job Templates, click on the link. Do not click this button unless you have knowledge of how this button functions. Consult your management team on this option.

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