Job Toolbar-Materials

The Materials form is used to create a list of inventory parts that will be used in the System installation and possibly invoice for individual parts; this depends on the Job Type setup.

Depending on the Job Type setup, Part sales prices may or may not automatically be filled in. If prices fill in for the Parts, this indicates you will be invoicing the customer for each individual Part entered in the Materials list. Sales prices may be overridden If the customer is being charge a different amount. Any part lines with a unit price will print on the customer Job Invoice.

If unit prices do not default into the part lines, this assumes you will be invoicing your customer under the Install Charges.

Once the Materials list has been saved, the Capture Original Parts button will be displayed at the lower left of the list. Clicking this button saves the original parts lists and creates a new "Working Parts List". If any changes need to be made to the parts list after the capture, this is done from the working parts list. You may toggle back and forth between the original parts list and the working parts list to see what changes have been made as the job progresses.

After "Capturing" the original parts list, if it is discovered the capture was performed before the parts list was completed, a User with the appropriate permission will have access to the Override Parts Capture button. Clicking the Override Parts Capture button will create a new Original and Working parts list.

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Materials List Columns

There are several columns of information shown in the Materials grid. Most of the information will auto-fill once a Part Number is entered.
Once a part is selected, the Description, Vendor, Unit Cost (if invoicing for parts), and LU (Labor Units) will auto-fill based on the defaults stored in the Part setup.

The Vendor is the Primary Vendor from whom the part is normally purchased. If the part needs to be ordered, this will be the Vendor that will automatically be selected when creating a Purchase Order within the Job.

In the column labeled Stock, if the box is checked (this defaults from the Part setup), this indicates the part is normally in stock in your warehouse and it does not need to be ordered. You may un-check this box if you want to order the part for the Job.

The Location column is provided to manually enter a zone number or a physical location of where the part will be installed. If you are installing multiples of the same part number and enter the total quantity of that part as one line in the Materials list, when the Job closes, if the quantity is less than 26, the number of devices will be exploded into individual records on the Customer's System Equipment list. A staff member may enter the Location of each piece of equipment from the Customer Explorer after the Job has closed. Having location information is extremely helpful when servicing the system in the future.

The Unit, Ext and Tax fields would automatically fill in with the sales price and any applicable sales tax - these will only auto-fill if the Job Type is setup to Invoice for individual Parts.

If any value is shown in the LU (Labor Units) column, this is the total number of Labor Units required to install the Part. If a quantity of more than 1 is entered for the Part, the unit Labor Units on the Parts setup will be multiplied by the quantity to arrive at a total number of Labor Units for the device. The software adds up all Labor Units on Parts and any entered on Install Charge Lines and displays the total number at the top of the Job record.

The PO and PO Description fields are only used if a Job is created as the result of an imported Quote from the QuoteWerks application. The PO field would list what the unit Purchase Cost should be and the PO Description would display the Vendor who should be used when ordering the Part.

Using Phase Codes on the Materials List
The Phase column of the Material list provides functionality for:

- Determining the Phase of the Job where the Part will be used

- Allows you to create Purchase Orders by the unique Phases of the Job

- If Invoicing the customer for the individual Parts in the Materials list, you may Invoice just the parts one Phase at a time

At the top of the Materials list is a checkbox labeled Show Phases. When checking this box, the Phase column will display as the first column position in the Parts grid. Here you may select from the drop-down list a Phase for each Part listed. In the example below, we have assigned two unique Phase codes; 01 Prewire and 02 Installation. When using more than one Phase Code, the Materials list will first sort by the Phase Code, and then by the order in which the was entered into the list.

If a Job has a very large list of Parts and the Job will be installed over a period of time, using the Phase Codes on the Materials list will help in ordering only the parts that are needed in the near future.

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