

Tools Toolbar-Phases

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Job Phases was designed primarily as a tool for Job resource planning; Labor and Materials. Job Phases are also used to determine which billable charges may be invoiced and when. When creating a new Job, Phases are assigned to individual parts on the Materials List, each Install Charge, and each Job Task line.

Each Job Type must contain at least one Phase, and the software is installed with one default Phase Code. If your company will not be using multiple Phases on a Job Type, when creating new Jobs, the one default Phase in the setup table will be automatically assigned to each part on the Materials List, each Install Charge line, and each Job Task line. The Phases form is used to view and manage the default Phases assigned to the Job Type for the Job. Additional Phases may be manually be added to individual Jobs depending on the Job situation.

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