Creating a Job from a Prospect

Last Modified on 01/11/2023 2:53 pm EST

Jobs are created for Prospects by "resolving" an Opportunity for the Prospect.

If the Prospect is an existing Customer, do not use this Job creation method. In the SedonaOffice Sales Management module, resolve the Opportunity, inactivate the Prospect/Opportunity, then use the Manual Job creation method to create the Job from the Customer Explorer.

Follow the steps listed below and on the following pages to create a new Customer, Site and Job.

1. Navigate to the Sales Management module/Prospects and open the Prospect record that will be converted into a new Customer and Job.

2. Click the Opportunities button on the Prospect toolbar.

3. In the upper tier of the Opportunities list, click once on the Opportunity that was sold then click the Resolve button located at the lower left of the form.

Resolve the Opportunity

4. The Opportunity Resolution form will be displayed.

- Select Resolution Code from the drop-down list
- Enter the Resolution Date (the date the sale was closed)
- Select the Competition from the drop-down list (optional)
- Select all four checkboxes; Close Opportunity, Inactivate Prospect, Create Customer, Create Job

Once all information is filled in, click the Save button located at the lower right of the form.

5. The New Customer Setup form will be displayed on the Customer Information data entry form. The name and address information automatically filled into this form was pulled from the information on the Prospect form. This is the customer Billing name and address information. If this information is not the correct billing information you may modify any of the information. Fill out this form according to your company policy and procedures. When finished, click the Site Setup tab.

6. The Site Setup form will be displayed. The name and address information automatically filled into this form was pulled from the information on the Prospect Opportunity form. If this information is not the correct site information you may modify any of the information. Fill out this form according to your company policy and procedures.
If the Custom Fields tab(farthest tab to the right of Site Setup) is not dimmed out, this indicates your company is using some or all of the data entry fields on this form.

When finished with the Site Setup, click on the Custom Fields tab and fill out this form according to your company policy and procedures.
When finished, click the Save button.   You will receive a message confirming you want to save this new Customer, click

the Yes button to proceed.

7. The Work Order Entry form will be displayed. This is the first data entry form for the new Job. Most of the information on this form will automatically be filled in from the Customer and Site information. Fill out this form according to your company policy and procedures.
Four fields on this form are required to be able to save and advance to the second Job setup form; Job Type, Install Company, Salesperson and Sold Date.
When finished filling out this form, click the Apply button located at the lower right to save and advance to the Job System form.

8. The Job System form will be displayed. If your company may need to create a Service Ticket for the system being installed while the Job is in progress, it would not be possible until the Job is closed. Since Service Tickets are linked to a System record, to be able to create a Service Ticket for this system you would need to setup the System information on the Customer Explorer record first; this method is highly recommended.
At this point, click the Apply button on the System form. You will then open the Customer Explorer record for the new Customer, setup the System information then return to the Job System form and import that information into the Job System form.

9. From the Main Application Button Toolbar, click the Customer Tree button to open the Customer Explorer record.

10. Once the Customer Explorer record is displayed, highlight Systems option from the Customer Tree; right-click and select the New System option.

11. The System form will be displayed. Fill out this form according to your company policy and procedures. When finished, click the Save button, then close the Customer Explorer form.

12. Once the System record has been setup and saved, return to the Job record. The next step will load the System information into the Job System form.
13. Click on the Job System button from the Job toolbar. Un-check the New System checkbox at the top left of the System form, then click the lookup button to the right of the System Account field. The Select Customer System form will be displayed. Double-click on the System record then click the Save button at the lower right of the form.

14. A confirmation message will be displayed; click the Yes button to proceed.

15. The Job System form will fill in with all the information setup from the Customer Explorer. click the Apply button to save the information loaded into this form.
While the Job is in process, any changes that need to be made to any of the fields of the System record must be done from the Job System form. When the Job is closed, the Job System information will overwrite the System information displayed in the Customer Explorer.

Install Charges Setup

16. The Installs form is used to create a list of Items that will be invoiced to the customer. You may also enter the total estimated labor units for the Job on any of the Install Lines; this will display in the Header area of the Job record. As labor timesheets are entered for a Job, those labor units will be displayed in the header area of the Job record.

When a Job is created from a Prospect, the Install lines will automatically fill in from the non-recurring Sales Items selected on the Opportunity record. These Install lines may be modified or deleted if necessary. Additional Install Charge lines may be added.
Once saved, Install Charges will display in the Sales Summary form.
Once an invoice has been created for the Job, Install charge lines may not be modified; any changes to Install charges will require creating a Change Order.

If you are invoicing for Install Charge Line(s), the Phase Code on the Install Charge Line must have a corresponding Task line (Job Tasks form) which is flagged for Invoicing, with the same Phase Code as on the Install Charge Line to be able to invoice for that Install Charge.

Recurring Charges Setup

17. The Recurring form is used to create a list of Items that will be invoiced to the customer for recurring services. The field Sub Item of is used if recurring lines are to be "rolled-up" on the customer invoice. In the example below the Sub Item of has been set to Mon for both recurring lines. When the customer is invoiced, all recurring lines with the same Sub Item of code will be group together and the services description that will display on the invoice with be the description of the Sub Item of code.
The Cycle Start date may be entered if it is known when the recurring services will be activated. If a date is entered into this field, this will default into the Job Invoice as the activation date; this date may be overridden when creating the invoice. Typically this field is left blank and filled in later by a staff member that has confirmed that the System has been activated.

When a Job is created from a Prospect, the Recurring lines will automatically fill in from the recurring Sales Items set up on the Opportunity record. These Recurring lines may be modified or deleted if necessary. Additional Recurring lines may be added.
Once saved, Recurring Charges will display in the Sales Summary form.

Once recurring services have been invoiced on a Job Invoice, the recurring line(s) will be activated and appear in the Customer Explorer record and will begin to bill with the next eligible cycle invoice batch.
Once Recurring Charges have been invoiced through Job Invoicing, they cannot be re-invoiced. As stated in the previous paragraph, the invoicing of Recurring Charges sets up the Recurring Lines on the Customer's Account to be billed through the Cycle Invoicing program. If the Recurring Charges were invoiced incorrectly through Job Invoicing, you would create a manual credit memo and apply it to the invoice; you will not be able to re-invoice those service again through Job Invoicing. To correct invoicing errors for Recurring Charges, you would need to create a Miscellaneous Invoice for the recurring charges.

Materials Setup

18. The Materials form is used to create a list of inventory parts that will be used in the System installation. This form also displays the quantity of parts that have been issued to the Job from a warehouse or from the receipt of a Purchase Order.

Since the Sales Opportuntiy does not have the functionality to create a Materials list, this must be manually created within the Job record.

If the customer is being invoiced for the individual parts, when parts are selected, the unit sales price will default into the part line. You may override the sales price 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 default into the part line but the customer is being invoiced a lump sum amount for all parts, you must zero out the part price, otherwise the part will be included on the customer Job Invoice.

There is a setting on each Job Type that automatically zeros out part prices; if this setting is in effect for the Job being processed, you will not be permitted to enter a sales price for parts; amounts for parts must be invoiced under the Install Charges.

Any amounts displayed in the LU (Labor Units) column are defaulted from the part setup. The application will multiply the quantity of the part times the labor units from the Part setup to arrive at a total estimated labor units for the job based on the materials list. If the total labor units calculated is less than the labor units estimated by the salesperson on the quote, you may enter the difference lacking on an Install charge line. You may also manually override the defaulted labor units on part lines if necessary.
If your company is tracking the location of where devices are installed at the site, you may enter up to 50 characters into the Location field of the part lines. For example if the job will use four motion detectors, you will enter four lines of the same part number and enter the location for each device.

After all parts have been added, click on the Apply button located at the lower right of the form.

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 and then the Apply 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. User Permission is required to use the Capture Original Parts button.

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.

Job Tasks

19. The list of Job Tasks is automatically loaded from the default Task List associated with the Job Type that was selected on the Work Order form. The Task list represents major milestones needed to complete the Job. As each Task is completed, the responsible staff member will approve the Task which will advance the Job Status to the Status assigned to the next Task in the list.

The Job Status is designed to indicate where the job is in the process of being completed. The Job Status is a filter on the Job Queue. For example if the Status of a Job is currently at Order Parts, if the User in your company responsible for purchasing materials filters the Job Queue on this status, a list of just the Jobs at this status are displayed.
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 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.
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. You may type in and save pertinent information for a task if you have 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.
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.

Job Costing

20. The Job Costing form is used to enter the estimated costs expected for the Job. These estimated amounts are used to compare to the actual costs as they are posted to the Job and when reviewing the Job at completion to view the actual profitability of the Job.
The Job Costing form is divided into three columns; Estimated Costs, Actual Costs and WIP (Work in Process). Part of the initial Job data entry is to enter the estimated costs for the job. As actual costs are incurred and posted to the Job, these amounts are displayed in the WIP column if your company is using Work in Process accounts or in the Actual Costs column if not using WIP.
Users with access to the Job Costing form may view the Job Costs any time while the job is in progress to see how the job is performing as compared to the estimated costs.
The estimated costs entered by the User are divided into five elements; Parts, Labor, Overhead, Other and Commissions. Auto calculate buttons are available for the Parts, Labor and Commission fields. **Parts**

When clicking the Calculate Cost Estimate button to the right of the Parts field, the application will multiply the part quantity times the standard cost of the part (if using standard costing) or the current average cost of the part (if using average costing) (from the company default warehouse) to arrive at estimated parts cost for the Job.
Labor
There are two Calculate Cost Estimate buttons to the right of the Labor field. When the button is clicked, the application will multiply the total labor units entered on Install Charge Lines and any labor units from the Materials list times the Estimated Labor Unit Cost factor on the Job Type setup to arrive at a total estimated labor dollars for the Job.
Clicking the button will open the Job Labor Tasks form. This form is used to breakdown the estimate labor costs into separate Labor Task lines. If this form is setup, your company will be able to compare the estimated costs by labor type to the actual costs entered on Labor Timesheets. This form is optional.

Commissions

When clicking the Calculate button to the right of the Commissions field, the application will automatically calculate the estimated commissions based on the commission setup for the Job Type and the Salesperson selected on the Job Work Order form. Using the Calculate button will not record any financial transaction for the Job regardless of whether your

company is expensing commissions immediately or using commission work in process accounts. To record the commission transactions, use the Commission form (Commissions button on the Job Toolbar).
Commissions may be manually manipulated by using the Commissions form (Commissions button on the Job Toolbar); any amounts entered on the Commissions form will automatically update the Estimated Commission amount field of the Job Costing form.

Overhead

If your company is automatically applying Overhead, if the auto calc button is clicked for the Labor field, the Overhead estimate will automatically fill in based upon your company setups in either the Job Type, Install Company or JM Setup Processing.
Other
The Other field is used to enter any miscellaneous job expenses such as permits/fees, equipment rentals, subcontract labor, etc.
If desired, you may manually type in estimates or use the auto calc buttons in any of the estimated cost fields.

Commissions

21. The Commissions form is used to list the commissions that will be paid to the Salesperson listed on the Work Order form and any other employee override commissions for a Job. You have the option of manually entering commission line items or auto-filling the form based on the setup information for the Job Type and the employee commission setup for the Salesperson assigned to the job or a combination of the two methods.

Job Costing

22. The Job Custom Fields form is an optional part of the Job record. This form is used to enter and track additional information pertinent to the Job. If any of the fields on this form are highlighted in yellow, this is a required field. Fill in this form according to your company policies and procedures.
This is the final step of setting up a new job from a Prospect record. For more information on processing the Job, refer to the Processing a Job topic.