

Job Queue

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The Job Queue is a listing of all Jobs currently in process - this is basically your company's backlog of Jobs. This listing is accessed from the Main Application Menu Job Management / Job Queue. At the lower right of the list, the Total Open Install Charges and RMR remaining to invoice is displayed. In the upper right of the form, the count of the total number of Jobs in process is displayed.

Users that participate in processing jobs, regularly work from the Job Queue to locate, open and work on Job records. Job invoicing is performed from the Job Queue, so members of the accounting team a regularly working with the Job Queue.

To begin working with any Job on the List, double-click on the desired Job line in the grid or highlight the Job line and click the Open button located at the lower right of the form or highlight a Job line in the grid and click the Open button located at the lower right of the form.

Job Queue Definitions and Functionality

The Job Queue contains filters at the top of the form, functions buttons at the upper left of the form, a listing of all open Jobs in the grid area, and function buttons at the bottom of the form. Each feature of the Job Queue is described below.

Filters

There are six filters available from which a User may select one or multiple combinations to arrive at the desired filtered list of Jobs. These six filters are Job Status, Job Type, Install Company, Installer, Project Manager and Task.

- Job Status - The User may select one particular Job Status or All Job Statuses
- Job Type - The User may select one particular Job Type or All Job Types
- Install Company - Companies operating under multiple branches typically setup an Install Company for each Branch location. If the User wants to view only the Jobs for the Install Company in which they work, a single Install Company may be selected. The default is All Install Companies.
- Installer - If an Installer was selected on the Job Work Order form, a single Installer may be selected. The Installer field on the Work Order is typically used to indicate the lead Installer for the Job.
- Project Manager - If a Project Manager was selected on the Job Work Order form, a single Project Manager may be selected.
- Task - This filter is used to locate all Jobs where the next Job Task to be approved is a particular value.

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Grid Area

One of the key columns on the Job Listing is the Job Status of each Job; the Job List may be filtered by Job Status. The Job Queue is typically used to locate Jobs that require action. For example, a Job Status may be labeled Order Parts; the person responsible for purchasing parts will filter the Job Queue on this status to display a list of only the Jobs currently at the Order Parts status and work with just this list of Jobs.

The Job Status is determined by the Status of the next Job Task line to be approved. Ask Tasks are approved by Users, the Job Status advances to the Status of the next Task line. Your company may create additional optional Job Statuses in SedonaSetup to use as overrides on a particular Job. For example, a Job Status of Waiting on Phones may be selected

when a job becomes stopped because the phone lines have not yet been installed at the site. This will help staff members identify Jobs that are in a hold status due to some particular circumstance.

The Job List may be re-sorted by clicking on any of the column titles in the grid section of the list.

Columns displayed within the grid area are:

- **Job Number**
- **Description** (This is typically the Job Type Description). The information displayed originates from the Description field on the Job Work Order form.
- **Customer Number**
- **Site Name**
- **Site Address**
- **Site City**
- **Created** - The date on which a User initially created the Job, which may be different than the Sold Date on the Job Work Order form.
- **Type** - Job Type selected on the Job Work Order form.
- **Task** - The next Job Task to be approved.
- **Status** - The status of the next Job Task to be approved.
- **Units** - Total labor units required for the Job. This is a total of all labor units entered on Install charge lines, and all labor units entered on parts within the Job Materials list.
- **Open Install** - The balance of all Install charges and Parts left to be invoiced.
- **Open RMR** - The balance of Recurring charges left to be invoiced.
- **Rem. Units** - The balance of labor units for the Job. This is the total labor units for the job minus any actual labor hours posted to the job from timesheets.

Upper Function Buttons

There are six possible function buttons located at the upper left of the Open Job List form, each of which is listed below.

- All Jobs - Clicking this button will display a list of all Jobs that are in process.
- Ready to Invoice - Clicking this button will display a list of all Jobs which are ready to be Invoiced.
- Unscheduled Jobs - Clicking this button will display a list of Jobs that have not been scheduled on the Job Schedule Board. Note: This Job Schedule Board is being retired - Job Scheduling is now performed within SedonaSchedule.
- Schedule - Clicking this button will open the Job Schedule Board. Note: This Job Schedule Board is being retired - Job Scheduling is now performed within SedonaSchedule.
- Appointment Summary - Clicking this button will open the Appointment Summary. Note: The Appointment Summary is being retired - Scheduling Job Appointments is now performed within SedonaSchedule.
- QuoteWerks Orders to Process - Clicking this button will display a list of all Quotes ready to process into Jobs. This button is only displayed for SedonaOffice customers who have purchased the add-on QuoteWerks integration and the

QuoteWerks software is installed on the User's workstation.

□ WeEstimate Orders to Process - Clicking this button will display a list of all Quotes ready to process into Jobs. This button is only displayed for SedonaOffice customers who have purchased the add-on WeEstimate integration and the WeEstimate software is installed on the User's workstation.

Lower Function Buttons

There are seven function buttons located at the bottom of the Open Job List form. Each button is described below.

When the Job Queue is first opened, the first 100 Jobs are loaded into the grid area. If your company has more than 100 open jobs, the First, Previous, Next, and Last buttons are used to move forward or backwards in the list of jobs.

- First - Clicking this button will take you to the beginning of the job list.
- Previous - If you have used the Next button, clicking this button will take you to the previous page of jobs.
- Next - Clicking this button will advance to the next 100 open jobs.
- Last - Clicking this button will take you to the last page of open jobs.
- Open Button - Clicking this button will open the currently highlighted Job in the Grid area.
- New Button - Clicking this button will open a New Job form; this is an alternate method of manually creating a new Job.
- Cancel - Clicking this button will close the Job Queue.

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