SedonaSetup - JM - Job Types Overview and Topics

Last Modified on 01/12/2023 2:13 pm EST

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The Job Type is probably the most important and most complex setup table in the Job Management module. A Job Type typically defines the type of system that is being installed at your customer site. The Job Type is a required field for each Job created, and will determine:

- Tasks which will default into the job task list.
- Determine which cost of goods G/L account will be used for job costing parts.
- Whether material will be expensed immediately or use the material work-in-process account as parts are issued to the job.
- Whether the job requires a holdback % (retain amount) on each invoice.
- Whether the job is to be billed progressively as a percent of the total contract amount.
- Whether the job will be "locked" once a flagged job task has been completed and approved.

The Job Type setup is divided into nine possible setup forms, some of which are optional. You may create as many Job Types as needed. Each job type must have at least one job task assignment.

Follow the links below for detailed setup instructions on each setup form within the Job Type Setup.

Detail

Job Tasks

Override Job Tasks

Costing

Items

Accounts

Commission Types

Approvals

Phases

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