Job Type - Job Tasks Setup

Each Job Type must be assigned at least one Job Task. Job Tasks are typically the major milestones that need to be completed to install a system. You may create a list of as many job tasks as needed for the Job Type.

Each Job Task must be assigned a Job Status; the Job Status indicates where the Job is, in the process of being completed.

When adding a Job Task to the list, two fields are available for selection; Invoice and Sequence Locks Job.
If the Invoice option is selected, once this task has been approved on a Job, the Job will appear in the job invoicing queue. If you are performing progress billings on this Job Type, you may select the Invoice option on multiple job task lines.

If the Sequence Locks Job option is selected, once this task has been approved on a job, the job will be forced into Lock mode, and a change order must be created to add, remove or reduce parts, install charges, recurring charges or commissions for the job.

The Lab Hours field is used to enter the estimated amount of time required to complete the Task. This information is used in conjunction with the Job Planner in SedonaSchedule for resource planning.

On the right side of the form are two arrows that are used if you need to rearrange the order of the Job Tasks.

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If the Percentage Invoice checkbox was selected on the Job Type Detail form, an additional column will be displayed for entering the percentage to invoice at various points in the Job. The total percentages must equal 100% to be able to save the Task List.

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