

Job Cost Summary

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The Job Cost Summary Report is designed to print a listing of Jobs displaying the Estimated amounts, Actual amounts and amounts in WIP (work in process accounts) and the profit margin. A grand total will be printed at the end of the report for all amounts.

This report may be generated for all open Jobs as of a particular cut-off date or Jobs opened within a particular Accounting Period range or Date range.

Once the desired options have been selected on the report options form, click the OK button to display the report in Print Preview mode.

Report Selections

General - One of the following options must be selected.

- *All Open Jobs (including jobs closed after As of Date)* - If this option is selected, the User then selects a cut-off date in the As of Date field at the lower left of the Report Selections form. The default As of Date is today's date.
- *All Jobs Sold Between* - If this option is selected, the User must also select either an Accounting Period range or Date range. Selecting this option will print all Jobs where the Sold Date on the Job Work Order form is within the Accounting Period or Date range selected.

Current Job Status - The report default is all Job Statuses. If the data for only certain Job Statuses is desired, the User will press the Invert Selection button then check the box to the left of each Job Status to be included in the report results.

- *Hide Inactive Job Statuses* - If data is not to be listed for inactive Job Statuses, select this option.

Branches - The report default is to print data for all active Branches. If it is desired to print the data associated with one or multiple Branches, you may select the checkbox to the left of each branch desired.

- *Hide Inactive Branches* - If data is not to be listed for inactive Branches, select this option.

Job Types - The report default is all Job Types. If the data for only certain Job Types is desired, the User will press the Invert Selection button then check the box to the left of each Job Type to be included in the report results.

- *Hide Inactive Job Types* - If data is not to be listed for inactive Job Types, select this option.

Install Companies - The report default is all Install Companies. If the data for only certain Install Companies is desired, the User will press the Invert Selection button then check the box to the left of each Install Company to be included in the report results.

- *Hide Inactive Companies* - If data is not to be listed for inactive Install Companies, select this option.

Salespersons - The report default is all Salespersons. If the data for only certain Salespersons is desired, the User will press the Invert Selection button then check the box to the left of each Salesperson to be included in the report results.

- *Hide Inactive Salespeople* - If data is not to be listed for inactive Salespersons, select this option.

Installers - The report default is all Installers. If the data for only certain Installers is desired, the User will press the Invert Selection button then check the box to the left of each Installer to be included in the report results.

- *Hide Inactive Installers* - If data is not to be listed for inactive Installers, select this option.

As of Date - The report default is today's date. This option is only used if the General option of *All Open Jobs* was selected. you may change to the desired As of Date.

Group By - The report default is to group by None. Selecting a Group By option will print totals a Group Header and totals at the end of each Group. Grouping options available are Branch, Department, Install Company, Installer, Job Status, Job Type, Project Manager and Salesperson.

Sort By - The report default is to sort by Job Number. Other Sorting options available are Customer Name, **Sort By** -

The report default is to sort by Job Number. Other Sorting options available are Customer Name, Customer Number or Site Name.

The screenshot shows the 'Job Cost Summary' dialog box with the following settings:

- General:** All Open Jobs (including jobs closed after As of Date); All Jobs Sold Between. Accounting Period: 10 10/1/2017 - 10/31/2017; Dates: 10 10/1/2017 - 10/31/2017.
- Current Job Status:** Activation, Change Order, Closed, CO Approval, Fliggle, In-Progress; Hide Inactive Job Statuses; Select All, Invert Selection.
- Branches:** A1, MI, OH; Hide Inactive Branches; Select All, Invert Selection.
- Job Types:** ACC-Com, ACC-Com Percentage, ACC-Com-Holdback, ACC-Res, ACC-Res Parts Price, ACC-Res_Copy; Hide Inactive Job Types; Select All, Invert Selection.
- Install Companies:** MI, OH; Hide Inactive Companies; Select All, Invert Selection.
- Salespersons:** Show All Employees; Anne.Miller, Bill.Carroll, carolynj, Devan.Clements, Donald.Drake; Hide Inactive Salespeople; Select All, Invert Selection.
- Installers:** Bob.Oliver, Borque.Fire, David.Jones, Devan.Clements, Gloria.Krane, Madison.Morrison; Hide Inactive Installers; Select All, Invert Selection.
- As of Date:** 4/9/2018; **Group By:** (None); **Sort By:** Job Number; Ok, Cancel.