

Jobs Sold

Last Modified on 01/18/2023 5:25 pm EST

The Jobs Sold Report is designed to print a listing of Jobs displaying the Estimated amounts, Actual amounts and amounts in WIP (work in process accounts), the profit margin and variances for the estimated vs the actual amounts. A grand total will be printed at the end of the report for all amounts. This report may be generated using one of the following options:

- All Jobs where the Sold Date is within a particular date range.
- All Jobs where the Approval Date is within a particular date range. Selecting this option will only produce a report if your company is activated and is using Job Approvals. [Click here for more information on the Job Approvals feature.](#)

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

Date - One of the following options must be selected. The date range will default to the current month beginning and ending dates.

- *Sold Date* - If this option is selected, the report searches on the Sold Date field entered on the Job Work Order form.
- *Approval Date* - If this option is selected, Jobs that were approved for processing within the specified date range will display on the report. This option is only used if your company is using the Job Approvals feature.

Current Job Status - The report default is all Job Statuses. If the data for only certain Job Statuses is desired, click 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, click 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, click 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.

Department - The report default is all Departments. If the data for only certain Departments is desired, click the Invert Selection button, then check the box to the left of each Department to be included in the report results.

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

Salespersons - The report default is all Salespersons. If the data for only certain Salespersons is desired, click 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.

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, Job Status, Job Type, 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.

Options - Consolidate Change Orders - This option is selected by default; Install Charges, Part Charges and RMR will be a total of amounts on the Job plus any change orders for the Job. If this option is not selected, each change order for the Job will be printed after the Job number.

The screenshot shows a software dialog box titled "Jobs Sold" with a close button (X) in the top right corner. The dialog is organized into several sections:

- Date:** Radio buttons for "Sold Date" (selected) and "Approval Date".
From: 2/01/2018
Thru: 4/30/2018
- Current Job Status:** A list of checkboxes: Activation, Change Order, Closed, CO Approval, Fliggle, In-Progress. A "Hide Inactive Job Statuses" checkbox is unchecked. "Select All" and "Invert Selection" buttons are at the bottom.
- Branches:** A list of checkboxes: A1, MI, OH. A "Hide Inactive Branches" checkbox is checked. "Select All" and "Invert Selection" buttons are at the bottom.
- Job Types:** A list of checkboxes: ACC-Com, ACC-Com Percentage, ACC-Com-Holdback, ACC-Res, ACC-Res Parts Price, ACC-Res_Copy. A "Hide Inactive Job Types" checkbox is checked. "Select All" and "Invert Selection" buttons are at the bottom.
- Install Companies:** A list of checkboxes: A1, MI, OH. A "Hide Inactive Companies" checkbox is checked. "Select All" and "Invert Selection" buttons are at the bottom.
- Department:** A list of checkboxes: Accounting, Administration, Installation, Sales New, Salesx, Service. A "Hide Inactive Salespeople" checkbox is checked. "Select All" and "Invert Selection" buttons are at the bottom.
- Salespersons:** A "Show All Employees" checkbox is unchecked. A list of checkboxes: Anne.Miller, Bill.Carroll, carolynj, Donald.Drake, Gloria.Krane. A "Hide Inactive Salespeople" checkbox is checked. "Select All" and "Invert Selection" buttons are at the bottom.
- Group By:** A dropdown menu set to "Branch". A "Start group on a new page" checkbox is unchecked.
- Sort By:** A dropdown menu set to "Job Number".
- Options:** A "Consolidate Change Orders" checkbox is checked.

At the bottom right, there are "Ok" and "Cancel" buttons.