Job Types

Last Modified on 07/27/2023 8:59 am EDT

Job Types

Menu path: SedonaSetup > Job Types

Job Types are defined in the Sales Packages in SalesAutomation (menu path: Setup > Proposal Setup > Sales Packages). The Job Type on the Quick Quote defaults from the Sales Package, however, a user may change the Job Type if needed.

Job types can control the Invoice Items that are available, when the specific Job Type is selected. This includes both Sales Packages and Quick Quotes within SalesAutomation.

Zero Part Price (Detail tab) - this checkbox determines if the price of the part defined in the Sales Package or Quick Quote includes the actual part price or is zero.

Items tab - Invoice Items that are selectable on a Sales Package or a Quick Quote, are limited to only those Invoice Items defined on the Job Type. If Invoice Items are selected on this form, the list may contain non-recurring services and recurring type services. If no Invoice Items are defined for the Job Type, then all active Invoice Items can be selected on a Sales Package or Quick Quote.

Job Type Setup

Job Type: Intrusion-Res   Description: Intrusion - Residential/Small Commercial

☐ Inactive

Detail | Job Tasks | O/R Job Tasks | Costing | Items | Accounts | Commission Types | Approvals | Phases

Field	Value	Field	Value
Category	Installation	Hold Back %	0.00
Material WIP	122100	Hold Back Item	Job Holdback
COGS Acct	510001	Hold Back Acct	110400
Use COGS Acct	510010	Est LU Cost	40
When Amt >=	9999999	☐ Zero Part Price	
Misc WIP	122140	Material Item	Job Part RSC
Accrued Income			

☐ Lease   ☐ Percentage Invoicing   ☐ Expense Part When Issued

☑ Allow Override Task List

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Item Code	Description	Default Amount
AutoCad	AutoCad	0.00
Carbon Monoxide	Carbon Monoxide Monitoring	0.00
Install Burg Res	Install Intrusion System	0.00
Install-Vac	Installation of Vacuum System	0.00
Intent & Affidavits	Intent & Affidavits	0.00
Job Deposit	Job Deposit	0.00
Job Labor	Job Labor RSC	0.00
Job Misc RSC	Job Misc Items	0.00
Job Part RSC	Job Part	0.00
MON	Monitoring	0.00
Mon GSM/Cellular	Monitoring (GSM/Cellular)	0.00
Mon-Disc	Monitoring Discount	0.00
Permit-Recurring	Permit	0.00

Item: _____   Amount: _____   [Save] [New] [Remove]

[Apply] [New] [Copy] [Delete]