

How to Set Up a Job Task and Add it to a Job

Last Modified on 09/16/2024 12:27 pm EDT

Issue:

Customer needs to add a new Job Task to Job

Resolution:

To add a new Job Task and add it to a Job Type:

Go to SedonaSetup > Job Tasks

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Click New button at bottom of the Tasks list

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Add the Code for the new task and make sure to select which user groups will be able to sign off on the task by marking the desired user group or groups from the box labeled User Groups allowed to Sign off on Task.

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Click Apply to save the change.

To add the newly added task to a Job Type:

Go to SedonaSetup > Job Types

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Select a Job Type you wish to add the new task to.

Go to the Job Tasks tab.

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From the dropdown window labeled Job Task, select the newly created Job Task

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Select the Job Status for the task.

1. If the task is supposed to create an invoice, mark the box labeled Invoice.
2. If the task is supposed to lock the job, mark the box labeled Sequence Locks job.
3. Add labor hours if needed.

Save the changes by clicking the Save button.

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The task will always be added to the Task list as the last item. If you need to change the order it falls in on the list, highlight the task and use the green arrows next to the list to move the task up and down to the place you want it on the list.

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When the task is in its desired placement, click the Save button to save the change in the list.

Then click Apply to save the change to the Job Type.

The next time this job type is used, it will have the new task added to the Job Task list.

To add the newly added Job Task to a job on the fly:

Go to the Job that you need to add the new task to and go to the Tasks window.

When the Tasks window is open, at the bottom of the screen click the button labeled New.

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In the Job Task dropdown menu, select the newly added Task item.

Select the desired Job Status and Phase Code.

If the task is meant to produce an invoice then mark the Invoice check box.

If the Task is meant to lock the job then mark the box labeled Sequence Locks Job.

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Click the Save button to save the task to the task list.

The newly added task will be added as the last in the list. If it needs to be moved, highlight it and use the arrows next to the list to move the task to the desired placement.

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Click Apply at the bottom of the Job window to save the change.
