

How to Add Additional Job Tasks to a Job

Last Modified on 09/16/2024 3:30 pm EDT

Sometimes jobs can require more Job Tasks to be done on them. What happens when there are no additional tasks that can be added? How can more be added to the job? This article will go through the steps needed to add the additional tasks. These steps cover SedonaOffice version 6.2.0.14 and above.

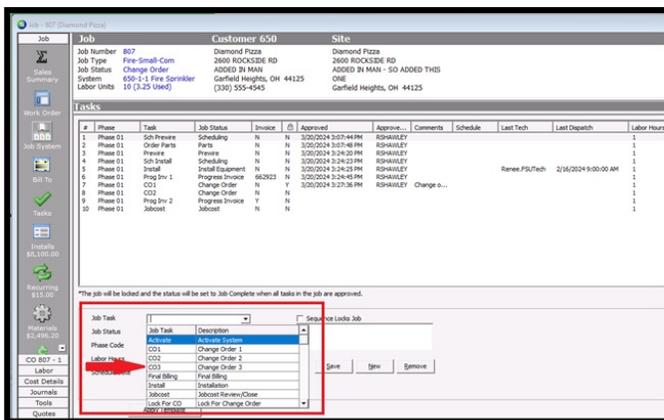
Overview

The steps needed to add these additional job tasks are predicated by the user having the correct permissions to be able to add new Job Tasks and be able to add those tasks to Job Types.

Steps:

1. Adding additional Job Tasks to a job

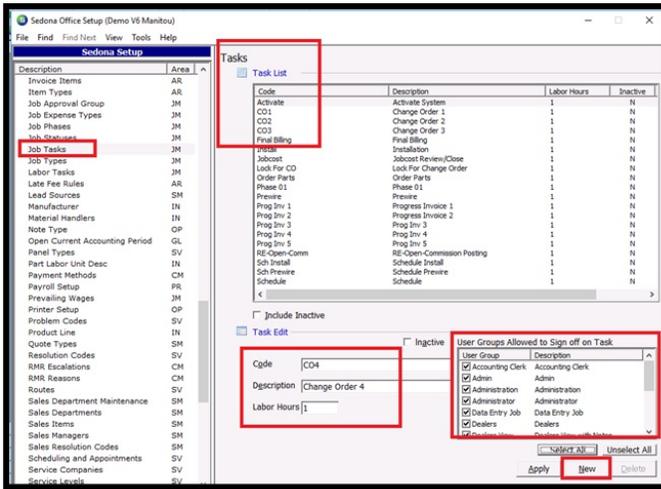
a. Adding additional Tasks to a job can be done by going into Tasks on the job – clicking New then click on the Job Task Drop Down.



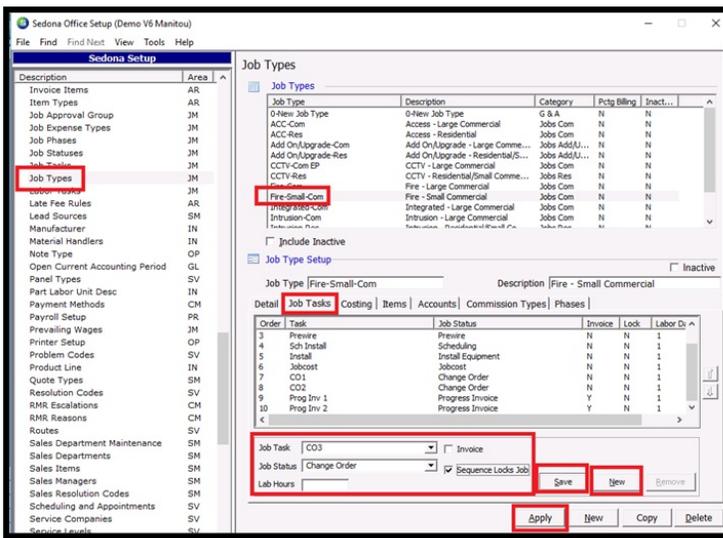
b. However, if you do not see what you need in the drop down, you will need to add it to the Job Type in the Job Tasks tab.

2. First verify if the Job Task is even available to use.

a. Open Job Tasks in SedonaSetup – Look for the task needed – if not listed, click New and add the task and User Groups allowed to see task – Save



b. Then click on Job Types – Open the Job Type that needs the new task added – Click on Job Task tab – Add the new task – Save – Apply



3. Now go into the job – Job Task – New – add the new job task that was just added – Save

Job: 807 (Diamond Pizza)

Job	Customer 650	Site
Job Number 807	Diamond Pizza	Diamond Pizza
Job Type Fire-Small-Com	2600 ROCKSIDE RD	2600 ROCKSIDE RD
Job Status Change Order	ADDED IN MAN	ADDED IN MAN - SO ADDED THIS
System 650-1-1 Fire Sprinkler	Garfield Heights, OH 44125	ONE
Labor Units 10 (3.25 Used)	(330) 555-4545	Garfield Heights, OH 44125

#	Phase	Task	Job Status	Invoice	Approved	Approve...	Comments	Schedule	Last Tech	Last Dispatch
1	Phase 01	Sch Prewire	Scheduling	N	N	3/20/2024 3:07:44 PM	RSHAWLEY			
2	Phase 01	Order Parts	Parts	N	N	3/20/2024 3:07:48 PM	RSHAWLEY			
3	Phase 01	Prewire	Prewire	N	N	3/20/2024 3:24:20 PM	RSHAWLEY			
4	Phase 01	Sch Install	Scheduling	N	N	3/20/2024 3:24:23 PM	RSHAWLEY			
5	Phase 01	Install	Install Equipment	N	N	3/20/2024 3:24:25 PM	RSHAWLEY			
6	Phase 01	Prog Inv 1	Progress Invoice	662923	N	3/20/2024 3:24:45 PM	RSHAWLEY		Renee.FSUtech	2/16/2024 9:00:00 AM
7	Phase 01	CO1	Change Order	N	Y	3/20/2024 3:27:36 PM	RSHAWLEY	Change o...		
8	Phase 01	CO2	Change Order	N	N					
9	Phase 01	Prog Inv 2	Progress Invoice	Y	N					
10	Phase 01	Jobcost	Jobcost	N	N					

*The job will be locked and the status will be set to Job Complete when all tasks in the job are approved.

Job Task: [] Sequence Locks Job: []

Job Task	Description
Activate	Activate System
CO1	Change Order 1
CO2	Change Order 2
CO3	Change Order 3
Final Utility	Final Utility
Install	Installation
Jobcost	Jobcost Review/Close
Lock For CO	Lock For Change Order
Apply Template	

Buttons: Save, New, Remove

4. These steps can be done for any task that is needed – Change Orders / Progressive Invoicing etc.