

This is a quick reminder of how to do some of the things we covered in the “Mastering Jobs” webinar.

DEFINITIONS

JOB

A Job is a module to track profitability and productivity across multiple invoices for larger projects.

PROGRESSIVE BILLING

Used for Jobs that will have multiple invoices. This is a percentage-based billing option, for billing in phases.

CREATING A JOB WITH PROGRESSIVE BILLING

Follow this procedure to create a Job that will be billed in phases.

1. Open the customer you'd like to create the Job for, and add a **Quote** from the Quotes micro-dashboard.
2. Build an itemized Quote for the items that are anticipated to be used during the Job.
3. Save the Quote.
4. On the quote, mark any deposits taken on the **Payments** micro-dashboard. If there is no deposit, mark the Quote Status as **Accepted** in the Quote micro-dashboard.
5. Once the Quote is Accepted, click **Create Job** to the right of the Quote Status.
6. On the Job creation screen, mark the Job as Bill from Office, and change the Job Name if you'd like.
7. Select a Project Manager, if applicable.
8. Enter the **Job information**:
 - a. Job Type – Normal or Warranty
 - b. Job Status – Defaults to 'Awarded'
 - c. Change the Billing Type to **Progressive**
 - d. Enter your Start and Projected End Dates, if applicable.
9. **Save** the Job.

MANAGING THE JOB

Follow this procedure to track your Profitability on the Job.

1. The **Job Financial Progress** pane will show your Estimated versus Actual Cost and Revenue.
2. The **Job Financial Health** Pane will show your current Actual Profit, and Profit Margin. This is a clickable pane, which will open the **Job Financial Health Report**.
3. The Job Financial Health report will allow you to see a breakdown of your Costs and Revenue. This report will also separate Material, Labor, and Subcontractor costs.

ADDING WORK ORDERS TO THE JOB

Adding a Work Order to the Job is the same process as creating a Work Order for any customer.

Note: For profitability tracking, an item (billable or non-billable) must be added to the invoice of a work order in order for labor costs to track.

1. Click the **Work Orders** micro-dashboard
2. Click Add Work Order.
3. Enter the Work Order details and schedule the Work Order as normal.

ORDERING PARTS FOR THE JOB

Use this procedure to track which quoted items have been used. This is also used to track the cost of the Quoted items to the Job.

1. Create a work order, and schedule it (the work order does not have to be assigned to a technician at this point).
2. Open the Work Order and go to the **Invoice** micro-dashboard.
3. At the top left of the invoice, click the **Add From Job Quote** button.
4. On the screen that pops up, check the box next to the Quoted items that will be used on this Work Order, and enter the quantity of the item to add.
5. If all quantities of an item have been added to the Invoice, the item will be shown in the **Fulfilled Items** section of this screen and cannot be added again.
6. Click **Add to Invoice**.
7. Note that the items are added to the invoice, however they have a \$0.00 **Rate**. This invoice is used to track the cost of the items for profitability, and does not need to go to the customer.

ADDING A PROGRESSIVE INVOICE TO THE JOB

Use this procedure to create a Progressive Invoice to send to the customer.

1. Within the Job, click the **Invoices** micro-dashboard.
2. Click **Add Invoice**.
3. On the screen that pops up, enter the **Percentage** you would like to bill, to calculate the amount of the invoice. Alternatively, you can enter a dollar amount, which will calculate a percentage.
4. If this is the final Invoice, select **Create invoice for remaining balance of job amount**. This will create an invoice for the remaining balance.
5. Below, select the item that will appear on the invoice to the customer, with the billed amount.
6. Click **Create Invoice**.
7. On the next screen, Select the Lead source for the Job, confirm or edit the invoice details as needed, and click **Create** at the top right of the window.

ADDING CHANGE ORDERS TO THE JOB

Use this procedure to create a Change Order on the Job. Change Orders will adjust the Estimated Cost and Revenue in the Job Financial Progress Pane.

1. Within the Job, click the **Quotes** micro-dashboard.
2. Click **Add Quote**.
3. Add the items to be changed (or added) to the quote.
4. Set the Lead Source for the Quote.
5. Click **Create**.