

# Manage Job Statuses

## Job Statuses

Job statuses indicate the current stage of a job, helping users track progress, manage workflows, and ensure accurate reporting.

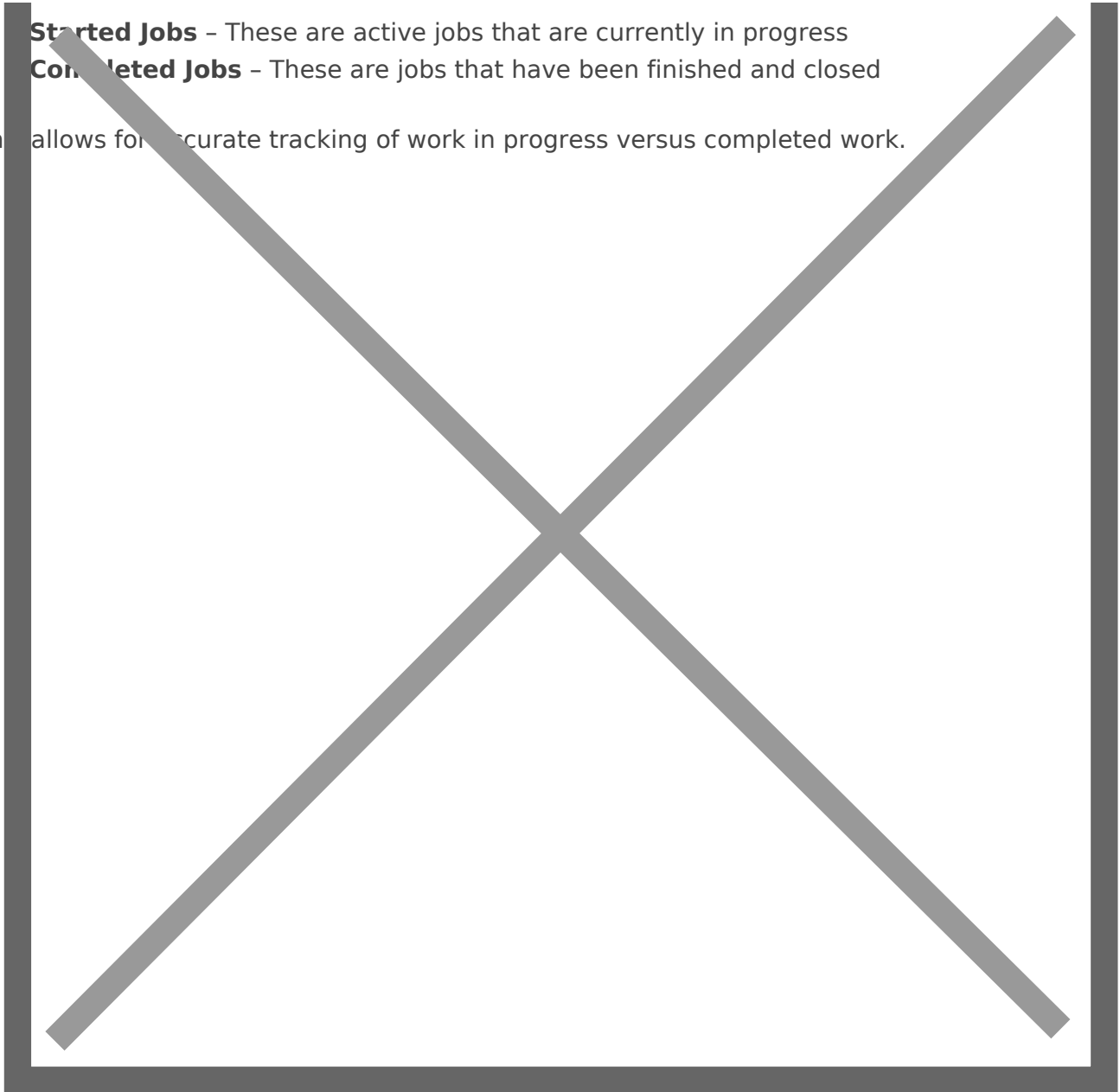
| Status              | Details                                                                                                                                                                                                                                                                                                 |
|---------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>NotStarted</b>   | The job has been created but not yet begun. It is unmanaged and has no active work or progress.                                                                                                                                                                                                         |
| <b>Started</b>      | The job is in progress. This typically means managed lines have been added or work has commenced.                                                                                                                                                                                                       |
| <b>Completed</b>    | The job has been finished and closed.<br>A final invoice will usually trigger the job to move to this status.                                                                                                                                                                                           |
| <b>Closed</b>       | <ul style="list-style-type: none"><li>• The job has been manually closed.</li><li>• This may occur if the job is no longer required, the customer is no longer active, or costs (such as stock or labour) cannot be recovered.</li><li>• Jobs are closed using the <b>Job Close</b> function.</li></ul> |
| <b>Cancelled</b>    | <ul style="list-style-type: none"><li>• Job is cancelled</li><li>• Job created was a mistake</li><li>• Job was NotStarted and needs to be taken off the list</li></ul>                                                                                                                                  |
| <b>JobBOM</b>       | The job is being used to produce a <b>Bill of Materials</b> .<br>In this case, the job acts like a “recipe” to build or assemble a final product from components.                                                                                                                                       |
| <b>InProcessing</b> | An error has occurred while completing the job, usually during invoicing.<br>These jobs should be reviewed and corrected.<br>To resolve, manually close the job and update the status to <b>Completed</b> , <b>Closed</b> , or <b>Cancelled</b> as appropriate.                                         |

When running reports, you can filter jobs based on their status, such as **Started** or **Completed**.

**Started Jobs** – These are active jobs that are currently in progress

**Completed Jobs** – These are jobs that have been finished and closed

This allows for accurate tracking of work in progress versus completed work.



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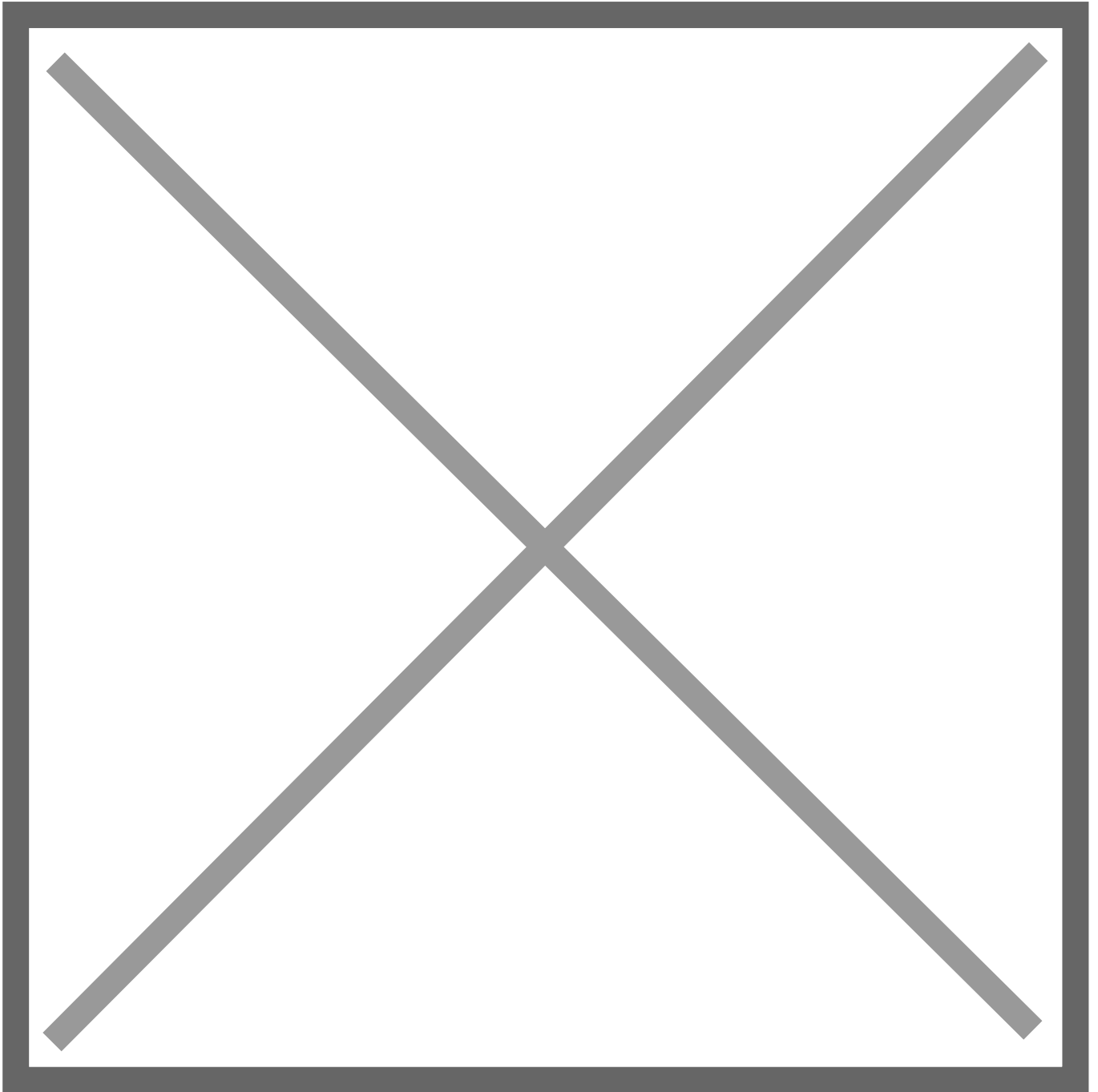
## Correcting an Incorrect Job Status

If a job has been closed or marked with the wrong status, it can be corrected by updating the job status.

- You can **toggle between Closed and Completed** as required

- To make this change, navigate to **Job History** and update the status accordingly

This ensures the job reflects the correct stage for accurate tracking and reporting.



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## In Processing Status Change

This status occurs when an issue arises during invoicing, preventing the job from being completed.

Typically, the invoice has processed correctly, but the job has failed to update to a completed status.

To correct this:

- Manually **close the job**
- Update the status to **Completed**

This ensures the job is properly finalised for accurate reporting and tracking.

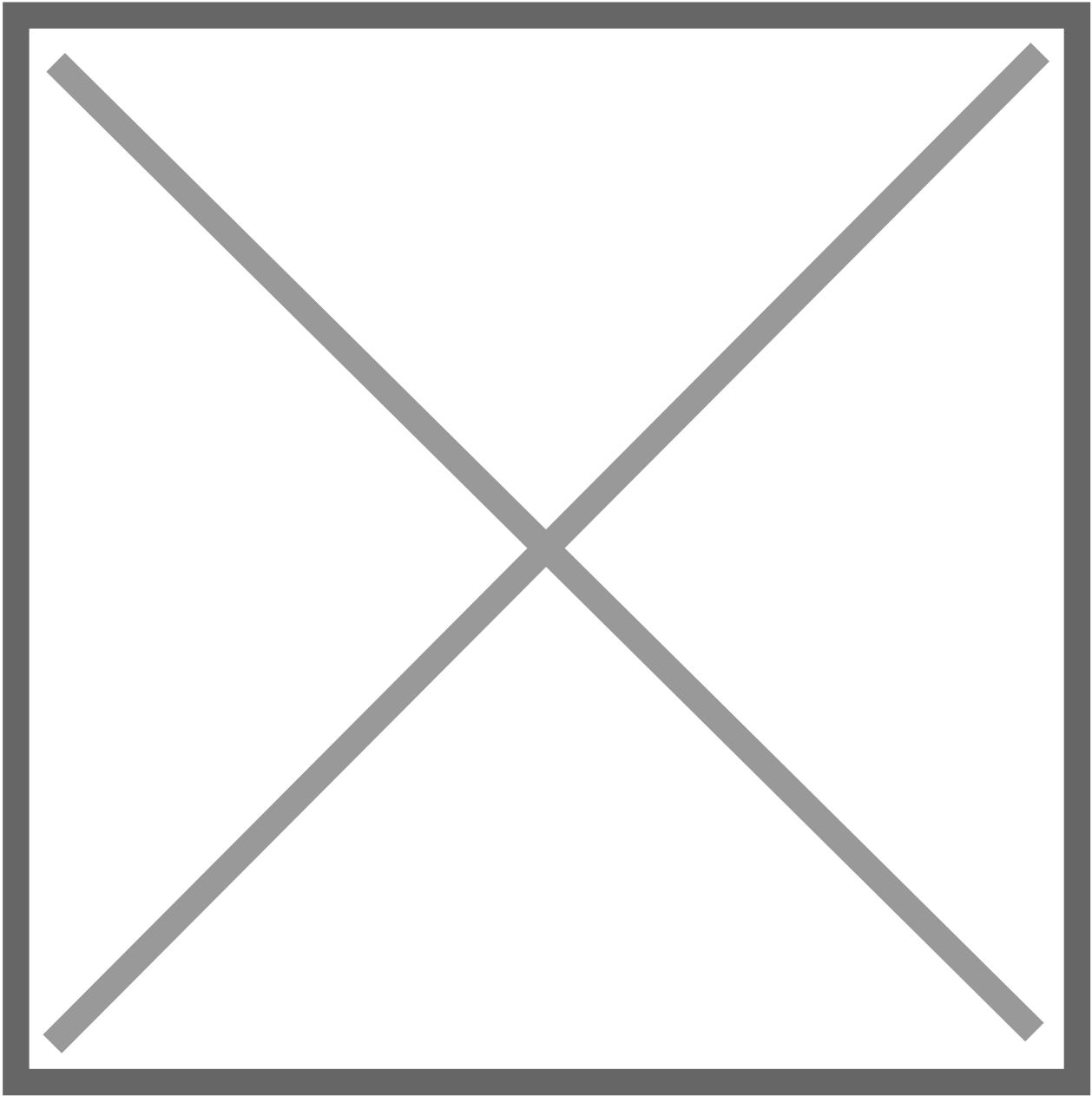
The screenshot shows the 'Job Search' interface. At the top, there are tabs for 'Basic Search' and 'Custom Search'. Below these are search filters for Job Number, Customer, Quote Number, Job Status, Date From, and Date To. A 'Functions' menu is open on the right, with 'Close or Cancel Job' highlighted. Below the filters, there is a table with columns: #, Att, Memo, Due, Job Status, Team, Info, WIP O/S, Status, % Comple, Sales Rep., Start Date, Job No, Quote, and Re. The table contains one row with Job No 7340, Status 'InProcessing', and % Comple 100%.

| # | Att | Memo | Due | Job Status | Team | Info | WIP O/S | Status       | % Comple | Sales Rep. | Start Date | Job No  | Quote  | Re |
|---|-----|------|-----|------------|------|------|---------|--------------|----------|------------|------------|---------|--------|----|
| 1 |     |      |     |            |      |      |         | InProcessing | 100%     | CO         | 2023-08-01 | JOB7340 | QT4643 |    |

## Job Manage status search

[Job Costing](#) > [Activity](#) > [Manage Job](#)

Due date colours is based on Completion date to current date



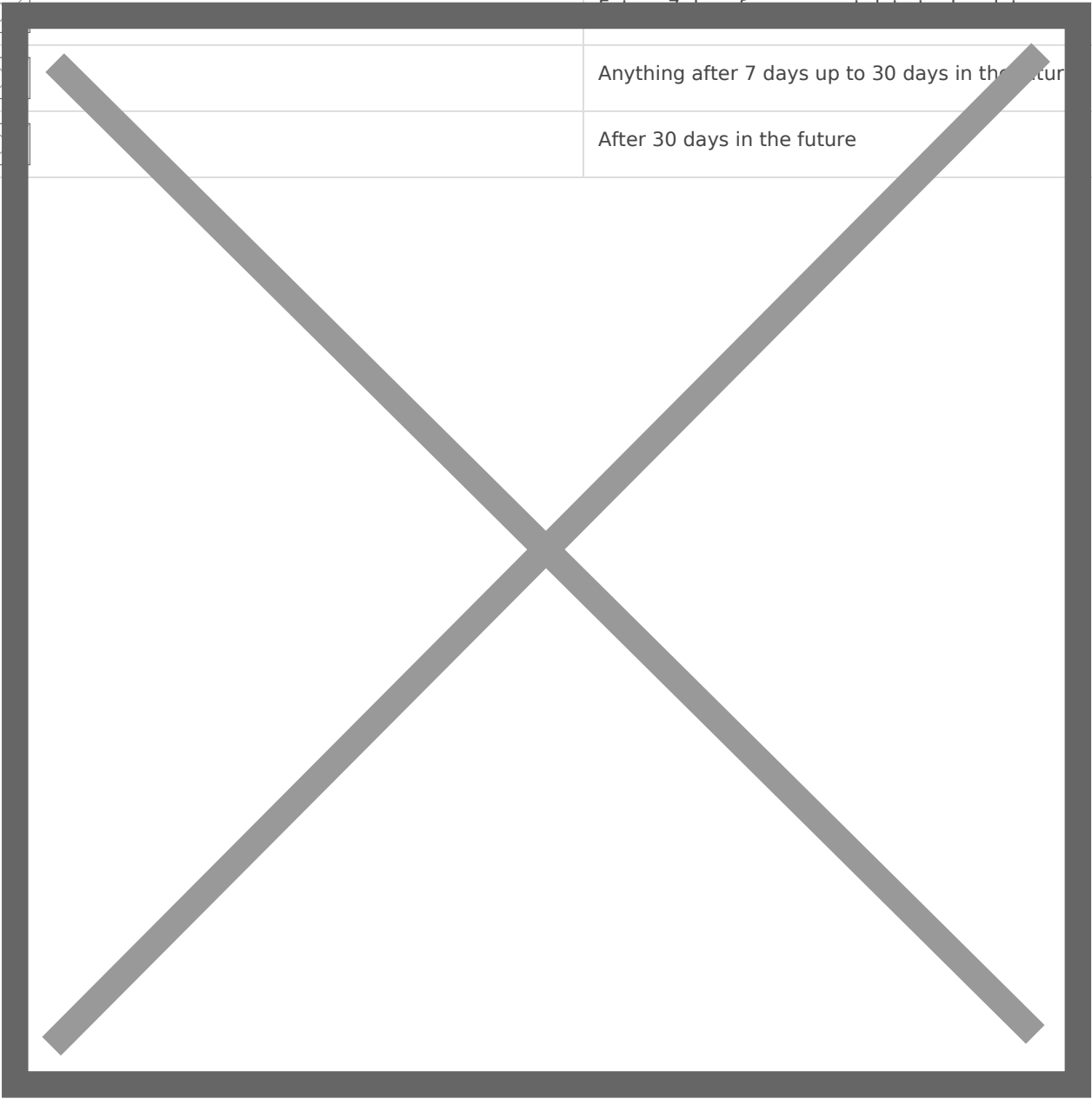
## Job Status Line Due Date

[Job Costing](#) > [Activity](#) > [Manage Job](#)

Due date colours are based on the **Completion Date compared to the current date**. These visual indicators help quickly identify whether a job is on track, approaching its deadline, or overdue.

| Icon                                                                                | Details                                          |
|-------------------------------------------------------------------------------------|--------------------------------------------------|
|  | Past 30 days from Due date based on current date |

|                          |                                                     |
|--------------------------|-----------------------------------------------------|
| <input type="checkbox"/> | Before 30 days from due date based on current date  |
| <input type="checkbox"/> | Past 7 days from the Due date based on current date |
| <input type="checkbox"/> | Due date is on today's date                         |
| <input type="checkbox"/> | Due date is in the future                           |
| <input type="checkbox"/> | Anything after 7 days up to 30 days in the future   |
| <input type="checkbox"/> | After 30 days in the future                         |



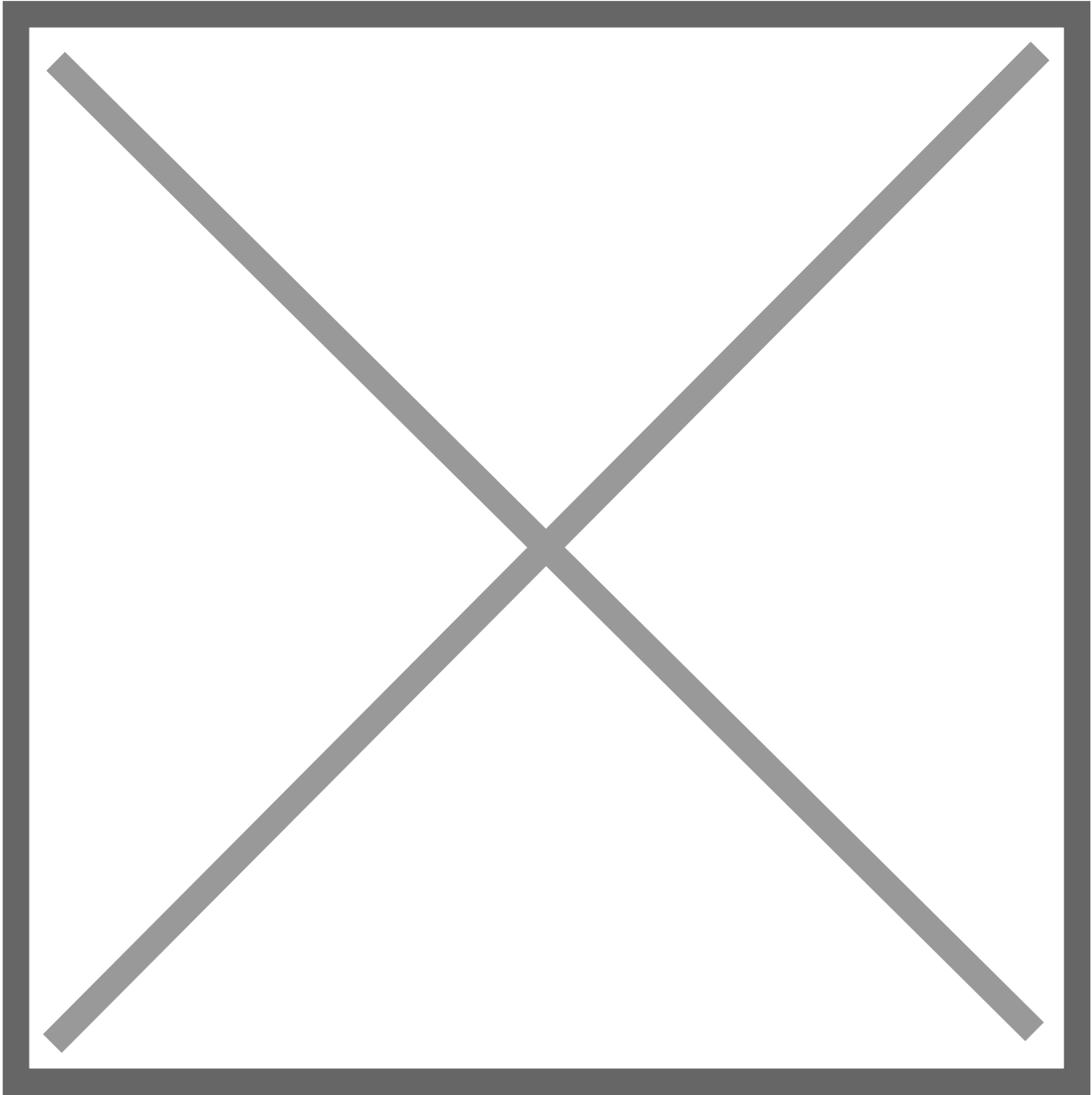
# Job Status Lines Indicators

## Job Costing > Activity > Manage Job

Line statuses provide a clear visual way to track progress by comparing planned (budgeted) quantities against actual usage, while also indicating whether a line has been completed. These colour-coded indicators make it easy to quickly see if a line is on track, completed, or exceeding plan.

| Icon                                                                                |              | Details                                                                                                                                                                                                                                                                                                |
|-------------------------------------------------------------------------------------|--------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|    | Not Started  | <p>No activity has been recorded on the line.</p> <ul style="list-style-type: none"><li>• No quantities have been allocated or processed</li><li>• The line has not been worked on yet</li><li>• Serves as a clear indicator that action is still required</li></ul>                                   |
|    | In Progress  | <p><b>In Progress (Green)</b></p> <p>Work has begun and the line is actively being managed.</p> <ul style="list-style-type: none"><li>• Quantities are being used or updated</li><li>• Actual usage is still below the budgeted amount</li><li>• Indicates the job is progressing as planned</li></ul> |
|  | Qty Reached  | <p><b>Qty Reached (Blue with Tick)</b></p> <p>The planned work has been completed exactly as expected.</p> <ul style="list-style-type: none"><li>• Actual quantity equals the budgeted quantity</li><li>• No overuse or shortfall</li><li>• The tick confirms the target has been met</li></ul>        |
|  | Qty Exceeded | <p>The line has gone beyond the original plan.</p> <ul style="list-style-type: none"><li>• Actual quantity is greater than the budgeted amount</li><li>• May indicate additional usage, cost overruns, or scope changes</li><li>• Should be reviewed for accuracy or approval</li></ul>                |

|                                                                                   |             |                                                                                                                                                                                                            |
|-----------------------------------------------------------------------------------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
|  | Is Complete | <p>The line has been manually marked as finished.</p> <ul style="list-style-type: none"><li>• No further updates are expected</li><li>• Confirms the line is finalised, regardless of quantities</li></ul> |
|-----------------------------------------------------------------------------------|-------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|



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## Manage Line Status Indicators

Line status comes in three types

## Line Status Types

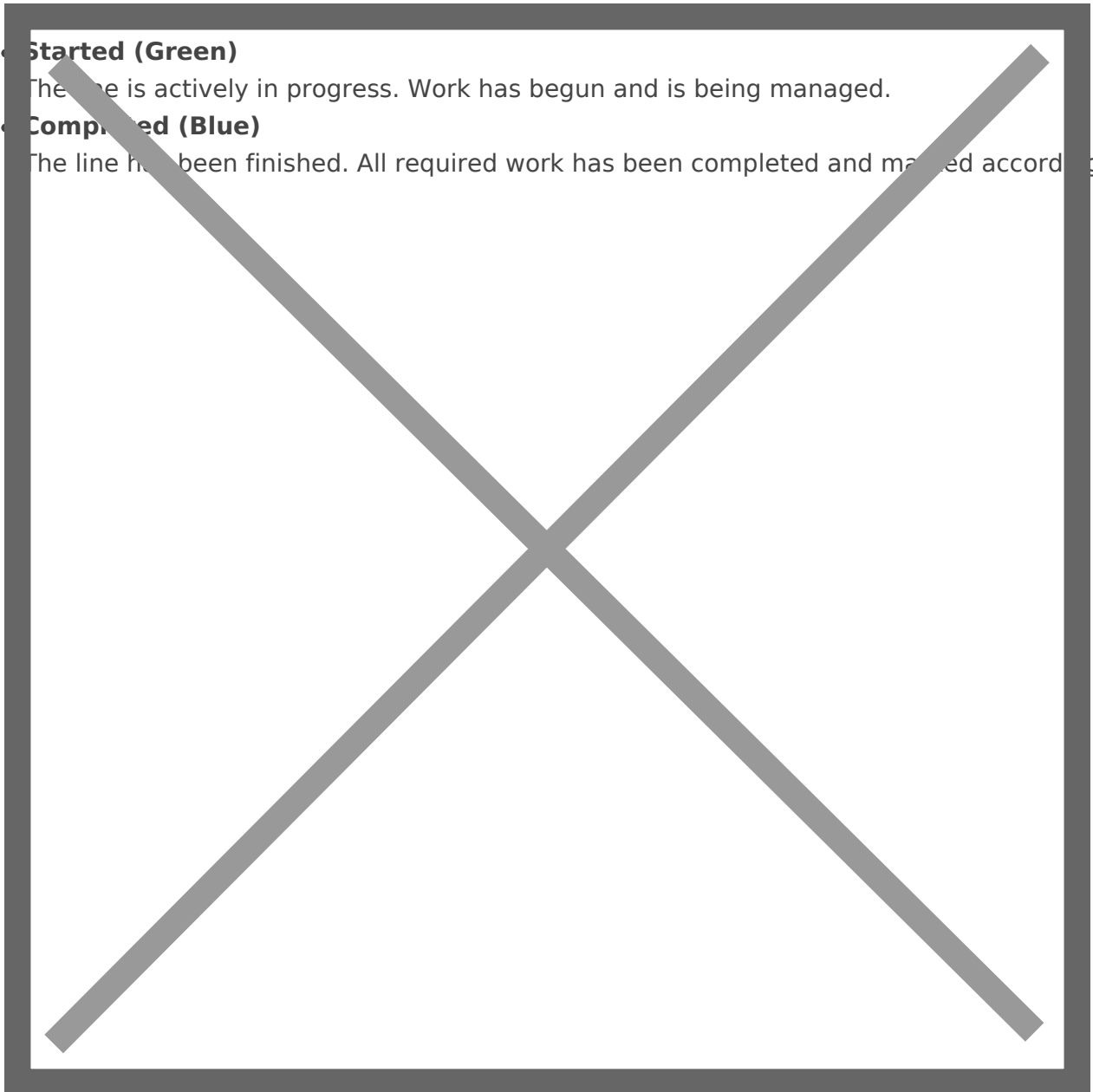
- **Not Started (Red)**

- **Started (Green)**

The line is actively in progress. Work has begun and is being managed.

- **Completed (Blue)**

The line has been finished. All required work has been completed and marked accordingly.



Revision #5

Created 15 June 2026 01:31:44 by Pamela

Updated 17 June 2026 01:43:22 by Pamela