

Job Costing Screens and Icons Defined

- [Quote Screen](#)
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Quote Screen

Extras Tab

AttachmentsMemoCreate ReminderQuote HistoryInfoFunctionsImportApproval Options

Quote

Quote DetailAddressExtrasLinkShippingActionDocsCus

Job No.:18Assign JN

Completion Date:22025-11-14

Asset Item:3

Customer Status:4

Assembly:5

Charge Up (SC):6

Prepriced (CTC):7

10Print Custom Fields:

11Manage Qty On Job:

12Exclude From Reports:

13Quote Total Description

14Sales Lead:

15Sales Lead Follow Up Date:

9Long Description:

16Quote Estimate

17Probability:0%

19T & Cs

20

Items

18

1920

Page 0 of 0

refresh

Barcode Printing

#Line Ref.Seq. No.LSStatusTypeCodeDescriptionUnit Sale

Promotion Value:Clear Discount

Discount %:0.00Amt:0.00

Service Month:November

Internal Contact:Acck Support

Pricing Analysis

Margin %

Mark-up %

Cost Ex VAT

Profit

Total

Selling

Sub Total

Less Discount

Ex VAT

VAT

Inc VAT

Deposit

1	Job Number	Clicking 'Assign JN' at this stage will generate a Job Number for the quote, which will automatically carry over once the quote is approved and converted into a actual job.
2	Completion Date	This is the date that you are expected to be able to complete this Job
3	Asset Item	

4	Customer Status	
5	Assembly	"Assembly" refers to an internal process where components or materials are prepared, combined, or staged before installation or delivery. It's not billed separately to the customer but contributes to your overall job cost.
6	Charge Up (SC)	Charge Up (SC)" means the customer is billed for actual time and materials used, including any extras beyond the initial scope. Charge Up allows you to invoice for additional costs incurred during the job.
7	Prepaid (Cost to Company)	"Prepaid" refers to the quoted amount for the job, the fixed charge agreed to by the customer. You can't invoice beyond this amount, so any extra time, materials, or costs that exceed the quote become your internal expense, or 'Cost to Company (CTC)
8	Assign JN	Clicking ' Assign JN ' at this stage will generate a Job Number for the quote, which will automatically carry over once the quote is approved and converted into a actual job.
9	Long Description	Here you can write a description of the job being done.
10	Print Custom Fields	
11	Manage Qty on Job	
12	Exclude from Reports	
13	Quote Total Description	
14	Sales Lead	If this quote originated from a tracked Sales Lead , the associated Sales Lead number will be displayed here. Updating the Probability percentage will automatically sync the change with the corresponding Sales Lead.
15	Sales Lead Follow up Date	Updating the Follow up the system will automatically sync the change with the corresponding Sales Lead follow up date.

16	Quote Estimate	
17	Probability	If this quote originated from a tracked Sales Lead , the associated Sales Lead number will be displayed here. Updating the Probability percentage will automatically sync the change with the corresponding Sales Lead.
18	Paging	If your line items span multiple pages and require navigation using the page up/down arrows, clicking the Paging Box will disable paging, allowing you to scroll through all items in a continuous view.
19	Dimension	
20	Show/Hide	

Link Tab

Quote

Customer Link: 1 | 8 Deposit Paid: ☐ 9 Deposit Amount: 10 Deposit Date:

Address Type: 2 |

Address Line 1: 3 |

Address Line 2: 4 |

Address Line 3: 5 |

Address Line 4: 6 |

Address Code: 7 |

Save Deposit

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Items

Page 0 of 0

Refresh Screen

Print Barcodes

Footer

Promotion Value: Clear Discount

Discount %: 0.00 Amt: 0.00

Service Month: November

Internal Contact: Acck Support

Pricing Analysis

Margin % undefined

Mark-up % undefined

Cost Ex VAT undefined

Profit undefined

Total

Selling

Sub Total

Less Discount

Ex VAT

VAT

Inc VAT

Deposit

1	Customer Link	Customer Link: Use this tab when completing work on behalf of another company. - If you're quoting for a client of one of your customers, you can link that end client here. - When the quote is sent, your customer will see which of their clients the quote relates to.
2	Address Type	
3-6	Address line 1-4	
7	Address code	
8	Deposit Paid	If a customer has paid a deposit, this can be added to the quote and taken off of the total cost of the job.

2	Shipping Date	
3	Send Email	
4	Shipping Location	
5	Internal Delivery	
6	Delivery Company	
7	Tracking Number	
8	Frozen	
9	Paging	If your line items span multiple pages and require navigation using the page up/down arrows, clicking the Paging Box will disable paging, allowing you to scroll through all items in a continuous view.
10	Dimension	
11	Show/Hide	

Action Tab

Print Barcodes

1	Stock Type	
2	Update Value	
3	Rounding	
4	Rounding	
5	Mark-Up %	
6	Set Mark-Up %	
7	Remove Lines	
8	Zero Sell, Price	
9	Incl. Cost on Reports	
10	Attach Specs to Email	

11	Set to Supplier Costs	
12	Update Labour Cost	
13	Set to System cost	
14	Set Sell Price	
15	Paging	If your line items span multiple pages and require navigation using the page up/down arrows, clicking the Paging Box will disable paging, allowing you to scroll through all items in a continuous view.
16	Dimension	
17	Show/Hide	

Docs Tab

This tab provides instant access to upload documents in any format (PDF, Word, Excel, etc.) or retrieve relevant files previously attached to this quote.

Attachments

Memo

Create Reminder

Quote History

Info

Functions

Import

Approval Options

Quote

Quote Detail

Address

Extras

Link

Shipping

Action

Docs

Cus

Save

Close

Print Quote

Job Card

Service Card

T & Cs

Page 0 of 0

Add

Open

Print

Remove

No data to display

#	Doc No	Company	Status	Doc Date	Type	Description	Created By	Date Time
---	--------	---------	--------	----------	------	-------------	------------	-----------

Items

Page 0 of 0

Paging

Add

Note

Edit

Delete

Quick Add

Dimension

Show/Hide

#	Line Ref.	Seq. No.	LS	Status	Type	Code	Description	Unit Sale
---	-----------	----------	----	--------	------	------	-------------	-----------

Footer

Promotion Value: 0.0000

Clear Discount

Discount %: 0

Amt: 0.00

Service Month: November

Internal Contact: Acck Support

Pricing Analysis

Margin %0.0000

Mark-up %0.0000

Cost Ex VAT0.0000

Profit0.00

Total

Selling

Sub Total0.00

Less Discount0.00

Ex VAT0.00

VAT0.00

Inc VAT0.00

Deposit0.00

Quote Item Screen

Additional options on a Quote Item

This screen also allows you to capture key information for each job or task line.

Edit Quote Item

QTY: 18

Quote Item

Inventory Overview

View Image

Special Item

Functions

Currency: NZD - NZ Dollar

Category: Stock

Close

Details

Notes

UOM

Specs

Build kit

Stock Item: 1 Drink bottle - Drink bottle Drink bottle

Description: 2 Drink bottle Drink bottle |

Item Group:

Qty: 3 7

Warehouse: 5 MAST - Master Warehouse

Pricing Structure: Default

Selling Ex VAT: 6 26

Selling Inc VAT: 7 29.9

Sub Total Selling: 8 182.00

VAT Value: 9 27.30

Total Selling: 10 209.30

Line Reference: 11

Sequence No: 12 1.0000

Promotion:

UOM Type: 13

UOM: 14

Line Discount: 15 0.0000 26.00

VAT Type: 16 01 Invoice GST:15

Mark-up %: 17 30.00

Cost Per Unit: 18 20.0000

Profit Cost / Unit: 19 6.0000

Total Cost: 20 140.0000

Zero Cost On Job: 21

Zero Cost On Invoice: 22

Show In Print: 23

Flag for Report: 24

Build Selection:

Weight Per Unit: 28 0

T/W: 0.0000

Division: 25

Sales Rep: 26 Dealer

Region: 27

Project: 30

Employee Assigned: 31

Lead Time: 32

Order Date: 33 2025-10-31

Reminder Date: 34 2025-10-31

Required Date: 35 2025-10-31

Supplier: 36 Rectron

Drop Ship: 37

RFQ: 38

PO Qty: 39 0

Item Cost: 40 NZD 20.0000

Item Code: 41 Drink bottle

Supp. Discount: 42 0.0000% 20.0000

Last Updated: 43 2025-03-22 21:24:48

Latest Cost: 44 20.00

Last Updated By: System Process

Internal Note: 45

Qty On Sales Orders: Detail

Qty on SO Confirm / WHS: Detail

Save & New

Save & Close

Close

Update Cost

1	Stock Item	Select your stock item from the drop-down menu
2	Description	At this stage you can change the Description if needed
3	Qty	Add the Quantity you require of this item
4	Manage Qty on Job	

5	Warehouse	Select the Warehouse you wish to sell this item form
6	Selling Ex GST	Price per item does not include the 15% Goods and Services Tax. You add GST on top of the listed amount.
7	Selling Inc GST	Price per item includes the 15% Goods and Services Tax. The GST is already built into the total amount shown.
8	Sub Total Selling	Total price of total quantity of item that does not include the 15% Goods and Services Tax. You add GST on top of the listed amount.
9	VAT (GST) Value	Total GST only on total quantity of items
10	Selling Total	Total price of total quantity of item includes the 15% Goods and Services Tax. The GST is already built into the total amount shown.
11	Line Reference	
12	Sequence No.	You can change the Sequence in the quote for this item
13	UOM Type	These are custom configuration settings applied during setup, tailored specifically to your product formats (e.g., Per Roll, Per Unit, Pack).
14	UOM	These are custom configuration settings applied during setup, tailored specifically to your product formats (e.g., 1000 per roll, 6 per pack).
15	Line Discount	You can apply a discount to this item
16	VAT (GST)Type	If this item is GST exempt or a Non-GST item it can be changed here
17	Mark up %	At this stage you can increase your profit %
18	Cost Per Unit	This is the total cost to produce or buy one item. It helps you set prices and track profitability.
19	Profit Cost/Unit	This is how much profit you make on each item sold after subtracting its cost.
20	Total Cost	This s the full amount spent to produce or purchase a set of items or complete a job.

21	Zero Cost on Job	These ticks will be automatically on or off based on the setup if the item. When the item is promoted to a Job, its initial cost is cleared and recalculated progressively as the job is built—ensuring you have an accurate final cost at completion.
22	Zero Cost on Invoice	As with the Cost on job, these ticks will be automatically on or off based on the setup if the item. When the item is promoted to a Job, its initial cost is cleared and recalculated progressively as the job is built—ensuring you have an accurate final cost at completion.
23	Show on Print	
24	Flag for Report	
25	Division	Select a division within of a company that focuses on one area of work.
26	Region	Select a region the job will fall under, it can include multiple cities or towns and often has its own local government or identity.
27	Days from Start	Use this field to schedule when this item should begin—set as a number of days from the job’s start date.
28	Weight Per Unit	This is determined at setup
29	Sales Rep	You are able to allocate someone who promotes and sells a company’s products or services to customers. They often handle quotes, follow-ups, and customer relationships, helping drive revenue and build trust.
30	Project	You can Link a quote to a specific project
31	Employee Assigned	Refers to the specific person responsible for completing a task or project. It helps track accountability, scheduling, and communication.
32	Lead Time	This is the amount of time between starting a process and completing it. It usually refers to how long it takes from placing an order to receiving the goods or service.

33	Order Date	This is the day a customer places an order for goods or services.
34	Reminder Date	This is the day you plan to check in after sending the quote.
35	Required Date	This is the day the customer wants the goods or service delivered
36	Supplier	This is the company that provides goods or services to another business
37	Drop Ship	Ticking this box enables you to generate a Purchase Order on the fly—complete with all relevant details, so you don't need to build one from scratch when drop-shipping an item.
38	RFQ (Request for Quote)	Ticking this box allows you to generate a Request for Quote on the fly—pre-filled with all relevant details, so you don't need to start from scratch when requesting updated pricing for an item.
39	PO Qty	Enter the quantity here for which you want to generate a Purchase Order or Request for Quote.
40	Item Cost	This shows the actual cost of the item
41	Item Code	This is the suppliers item code
42	Supplier Discount	Shows if you received a discount on this item when purchased from supplier
43	Last Updated	This is the date the cost was last updated for this item
44	Latest Cost	Similar to Item cost, this shows the actual cost of the item at that date
45	Internal Note	Here you can include private comment or detail added to a job, quote, or project that's meant for your team, not the customer.

Approve Quote to Job Screen

Job Details Tab

Approve Quote To Job

Quote - Approval

Job Details

BOM Create

1 Quote Number:

QT298

5 Quote Date:

2025-10-31

2 Customer:

Barcode

6 Branch:

HSOF

3 Description:

Sales

7 Order Number:

12587

4 Long Description:

Team:

8 Team 1

17 Allow To Exceed Quote Value:

☒

Employee:

9 All

18 Allow To Exceed Budget Qty:

☒

Department:

10 All

19 Activate Report Dates:

☒

Function:

11 All

20 Use Build Task Defaults:

☐

Est Start Date:

12 2025-11-04

Hrs:

1

21 Charge Up (SC):

☐

25 Assembly:

☐

Group Activity:

13

22 Prepriced (CTC):

☐

26 Lock Employee:

☐

14 Completion Date:

2025-11-07

23 Warehouse:

MAST - Master Warehouse

15 Delivery Date:

2025-11-07

24 Job Link:

16 Create PO Drop Ship:

☐

Continue

Close

Service Card

1	Quote Number	This is the Quote number linked
2	Customer	Customers Name
3	Description	This will be specific to the Job as an easy identifier in a list
4	Long Description	Here you can be more specific to the job
5	Quote Date	This is the date of the Quote

6	Branch	You can select a specific branch that this is linked to if you had these set up at the start
7	Order Number	Customer Order Number
8	Team	You can select a team if these have been setup
9	Employee	Refers to the specific person responsible for completing a task or project. It helps track accountability, scheduling, and communication.
10	Department	Add a department if this has been setup for your company
11	Function	
12	Est Start Date	Date estimated for Job to start
13	Group Activity	
14	Completion Date	Date Estimated for Job to be completed
15	Delivery Date	Date that the item is expected to be delivered to your customer
16	Create PO Drop Ship	This is to allow you to create a PO from the Job once its started.
17	Allow to Exceed Quote Value	Ticking this box allows actual job costs to exceed the quoted value. This is helpful when unexpected expenses arise during production or service delivery, and you want the system to continue tracking costs without treating the quote as a strict limit. If left unticked, a new quote must be created to include any additional costs.
18	Allow to Exceed Budget Qty	Ticking this box allows the actual quantity used in the job to exceed the budgeted amount. This is useful when additional units are required during production or service delivery. If left unticked, you'll need to produce a new quote to add more units.
19	Activate Report Dates	This will allow you to be able to report on this job

20	Use Build Task Defaults	When you create a build task default, you can specify alternative warehouses or item sources. Once a quote is converted into a job, the system will apply the defaults set in your build template. This ensures that materials are drawn from the designated warehouse rather than the main warehouse, allowing for more precise inventory control—especially when working with a master warehouse setup.
21	Charge Up (SC)	Charge Up (SC) means the customer is billed for actual time and materials used, including any extras beyond the initial scope. Charge Up allows you to invoice for additional costs incurred during the job.
22	Prepaid (CTC)	Prepaid refers to the quoted amount for the job, the fixed charge agreed to by the customer. You can't invoice beyond this amount, so any extra time, materials, or costs that exceed the quote become your internal expense, or ' Cost to Company (CTC) '
23	Warehouse	All stock will come from the Warehouse selected here
24	Job Link	You may find that you already have a job for this customer, and this is a sub job, to can select this job form the drop-down menu link to two or more jobs.
25	Assembly	"Assembly" refers to an internal process where components or materials are prepared, combined, or staged before installation or delivery. It's not billed separately to the customer but contributes to your overall job cost.
26	Lock Employee	You can lock the employee assigned to this job so it cannot be changed without your knowledge.

Manage Job Screen

Manage Job Screen

Manage Job

Search

Memo

Attachments

Create Reminder

Info

Workflow

Ready For Invoice

Functions

View Doc

Print Doc

Print

Print Reports

Save

Close

JOB1083

NotStarted

The Crossing

Days to Completion: -14

All Job Lines

Stock

Service

Custom

Tasks

Basic

Filter

Functions

Date Details

Address

Shipping / Link

Progress

Custom

JOB1083

CROSSING

QT316

Short Description: Toone - Concertina Louvre (792

Team:

Completed: 0%

0%

Reference: 7928

Alerts

Charge Up (SC): ☒

Assembly: ☐

Order No: MG260501

Prepriced (CTC): ☐

Internal Job: ☐

Sales Rep: DEALER

Sub Job Link:

Status/Position:

Comment:

Asset Item:

L: ☐

☐

☐

Manage

Sales Docs

Purchase Docs

Scheduling

Job Lines

Planned Time

Job Line History

Sub Job Link

BOM Links

Notes

Page 1 of 1

Remove Paging: ☐

1

Manage line

A Cost To Company

B Scope Creep

C Quote

2 Job Detail

3 Line History

Inventory Overview

#	To Inv	Notes	Line Type	QT No	Job Line Item Description	B-Status	Employee	Unit Sell	Days Req	Est. Qty	Budget Qty	Actual	Balance
1			Quote	QT316	Rain Sensor			520.00	-21	1	1	0	1
2			Quote	QT316	Concertina V2 - Extrusion ...			549.90	-21	1	1	0	1
3			Quote	QT316	Concertina V2 - Extrusion ...			630.50	-21	1	1	0	1
4			Quote	QT316	Concertina V2 - Extrusion ...			665.60	-21	1	1	0	1
5			Quote	QT316	Concertina V2 - Extrusion ...			982.80	-21	1	1	0	1
6			Quote	QT316	Concertina V2 - Ring Bea...			850.20	-21	2	2	0	2
7			Quote	QT316	Labour Setup			80.00	-21	20	20	0	20
8			Quote	QT316	Labour Technician			150.00	-21	10	10	0	10

Info	Used for internal notes only
Workflow	
Ready for Invoice	
Functions	
View Doc	
Print Doc	
Print	
Print Reports	

Basic Tab

Manage Job

Search | Memo | Attachments | Create Reminder | Info | Workflow | Ready For Invoice | Other | View Doc | Print Doc | Print Reports | Save | Close

Job Number: **JOB4694** Customer Name: **ImraanTotal Marketing** Days to Completion: **-1143** Job Status: **Started**

Header

☒ All Job Lines
☐ Stock
☐ Service
☐ Custom
☐ Tasks

Basic | Filter | Functions | Date Details | Address | Shipping / Link | Progress

JOB4694 **IS1** QT500403 Short Description: Team:
 Completed: 0% 0% ☒ Reference:
 Charge Up (SC): ☒ Assembly: ☐ Order No: x
 Prepriced (CTC): ☐ Internal Job: ☐ Sales Rep: CO
 Sub Job Link: Status/Position:
 Comment: Asset Item: L: ☒ ☐ ☐ ☐

Completed	
Charge Up (SC) Tick	
Assembly Tick	
Prepriced (CTC) Tick	
Internal Job Tick	
Sub Job Link	
Comment	
Short Description	
Reference	
Order No	
Sales Rep	
Status/Position	
Asset Item	

Job Percentage Complete

Manage Job

Search Memo Attachments Create Reminder Info Overview Ready For Invoice Other View Doc Print

Job Number: **JOB4686** Customer Name: **Sound and Security** Days to Completion: **122** Job :

Header

Basic	Filter	Functions	Details	Address
JOB4686	SAS	OT500364	Short Description:	Task detail
Completed: 97%		-> 97% ☒	Reference:	
Assembly: ☒			Order No:	Order458
Charge Up: ☒			Sales Rep:	
Prepriced: ☒			Status/Position:	
Sub Job Link: JOB4669			Trackit Item:	

Manage Documents Orders Coordinate

Job Lines Line History All Sub Job Link BOMs Notes

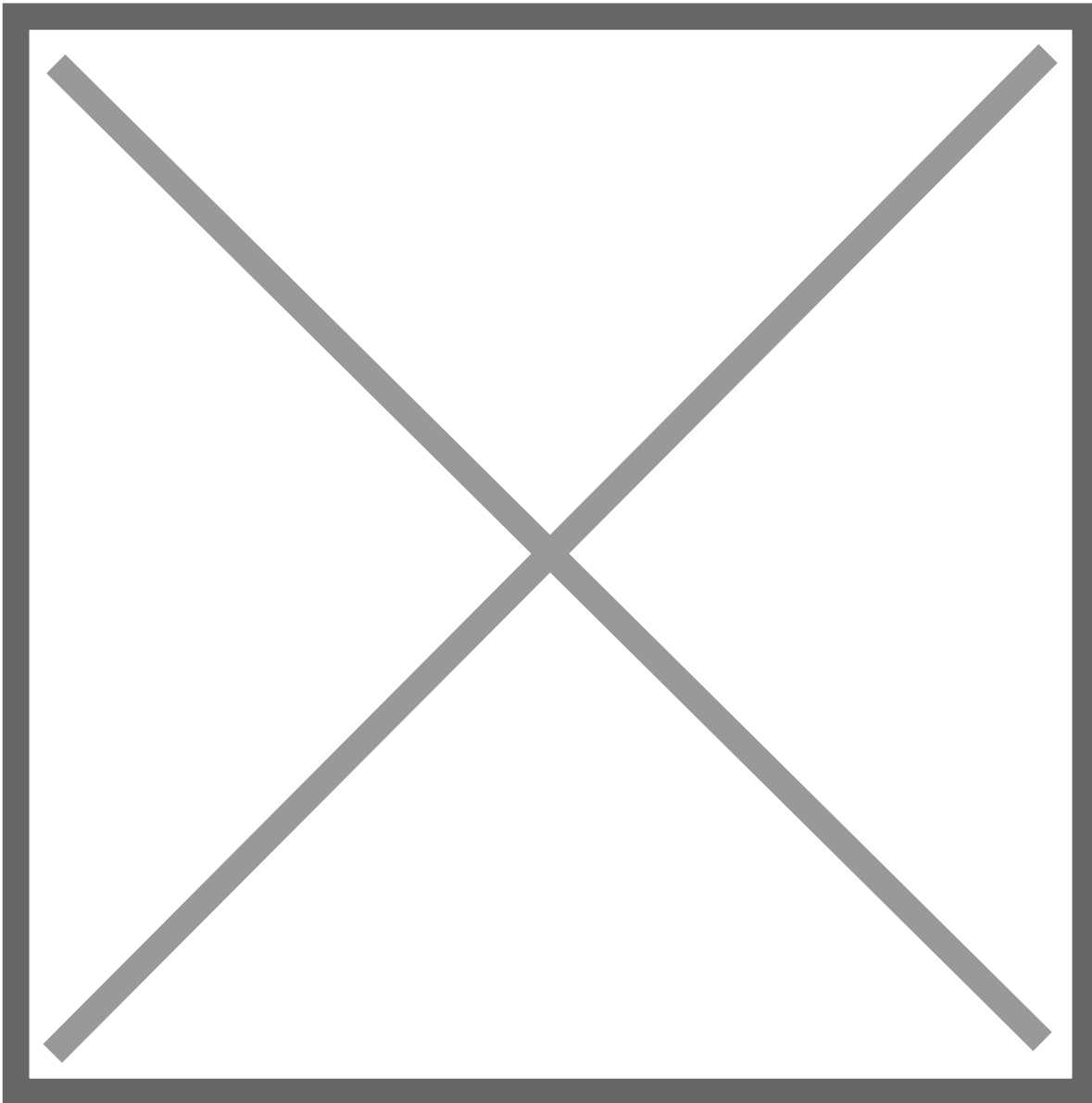
Page 1 of 1 Remove Paging: ☐ Manage Job A Cost to Company B Scope Creep C Quote

The job completion percentage is calculated by comparing the **total budgeted quantity** to the **total actual quantity completed**.

This value is displayed in blue; however, it may not always accurately reflect the true completion status. In such cases, the user may need to adjust it manually.

The percentage can be updated by clicking the **arrow button** or selecting a value from the **dropdown menu**.

If the **tick box is enabled**, the percentage will automatically update each time the job is saved. If the tick box is disabled, the percentage will remain unchanged and must be updated manually by the user.



A single button is available to **update the completion percentage across all jobs simultaneously**.

This function will only apply to jobs where the **tick box is enabled**. Jobs with the tick box disabled will **not be updated automatically** and must be adjusted manually by the user.

Manage Job Notes

The Notes for Manage Job has been upgraded to the new text format

Manage Job

Search

Memo

Attachments

Create Reminder

Info

Workflow

Ready For Invoice

Functions

View Doc

Print Doc

Print

Print Reports

Save

Close

JOB1074

Started

Barcode

Days to Completion: 6

All Job Lines

Stock

Service

Custom

Tasks

Basic

Filter

Functions

Date Details

Address

Shipping / Link

Progress

Custom

JOB1074

BAR001

QT305

Short Description: Test pricing

Team:

Completed: 40%

Charge Up (SC): ☐

Prepriced (CTC): ☐

Sub Job Link:

Comment:

0%

Assembly: ☐

Internal Job: ☐

Reference:

Order No: 89

Sales Rep: DEALER

Status/Position:

Asset Item:

Alerts

Manage

Sales Docs

Purchase Docs

Scheduling

Job Lines

Planned Time

Job Line History

Sub Job Link

BOM Links

Notes

Save

Print

B

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U

A:

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↶

↷

+

note

Characters : 4

Filter Tab

Manage Job

Search

Memo

Attachments

Create Reminder

Info

Workflow

Ready For Invoice

Other

View Doc

Print Doc

Print Reports

Save

Close

Job Number: JOB4694

Customer Name: ImraanTotal Marketing

Days to Completion: -1143

Job Status: Started

All Job Lines

Stock

Service

Custom

Tasks

Basic

Filter

Functions

Date Details

Address

Shipping / Link

Progress

Cu

Item Code:

Description:

Department: All

Function: All

Req Date From:

Quote No:

Employee: All

Line Type: All

Line Reference:

Line Status: All

Req Date To:

Group Name:

Show Locked Lines: ☐

Update Lines

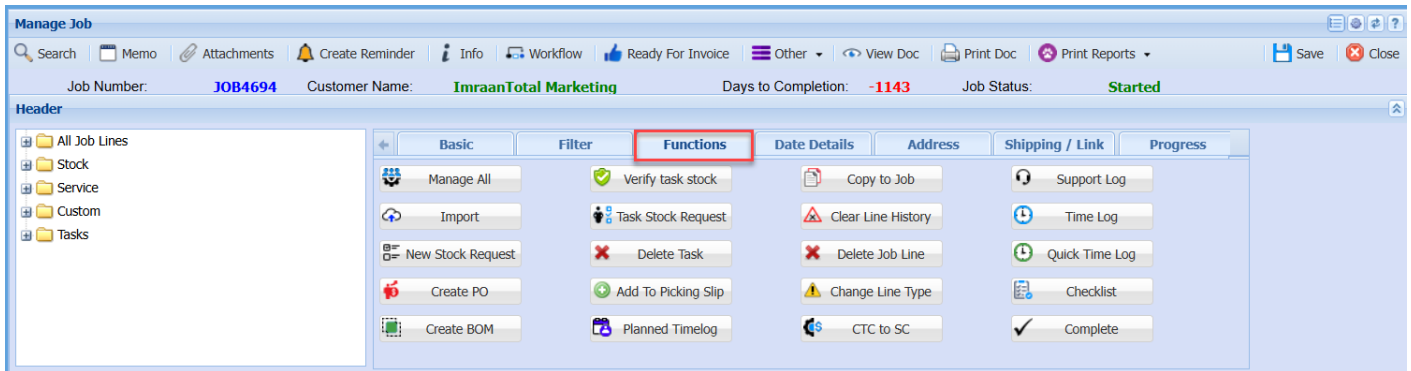
Clear Filter

Delete Range

Item Code	
Description	
Department	
Function	
Req Date From and To	
Quote No	
Show Locked Lines Tick	
Employee	
Line Type	
Line Reference	

Line Status	
Group Name	
Update Lines	
Clear Filter	
Delete Range	

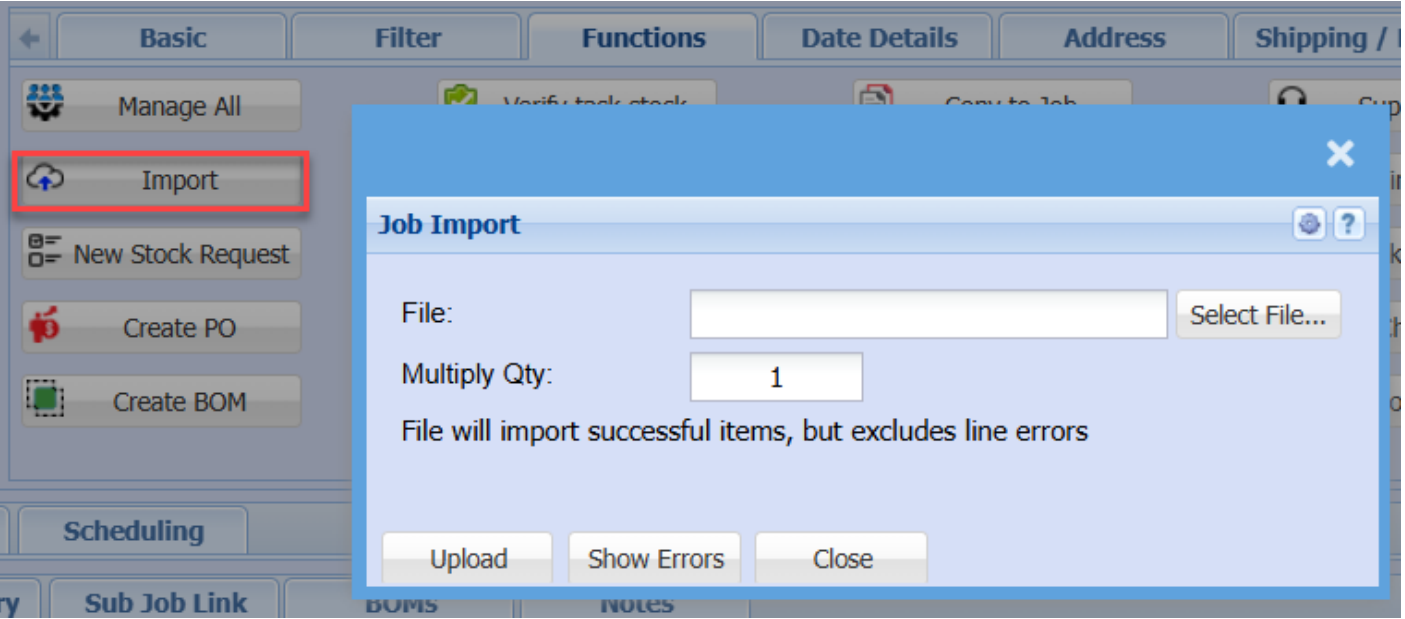
Manage Job - Functions Tab Explained



Manage All	
Import	
New Stock Request	
Create PO	
Create BOM	
Verify task stock	
Task Stock Request	
Delete Task	
Add to Picking Slip	
Planned Timelog	
Copy to Job	
Clear Line History	
Delete Job Line	
Change Line Type	
CTC to SC	
Support Log	
Time Log	
Quick Time Log	
Checklist	

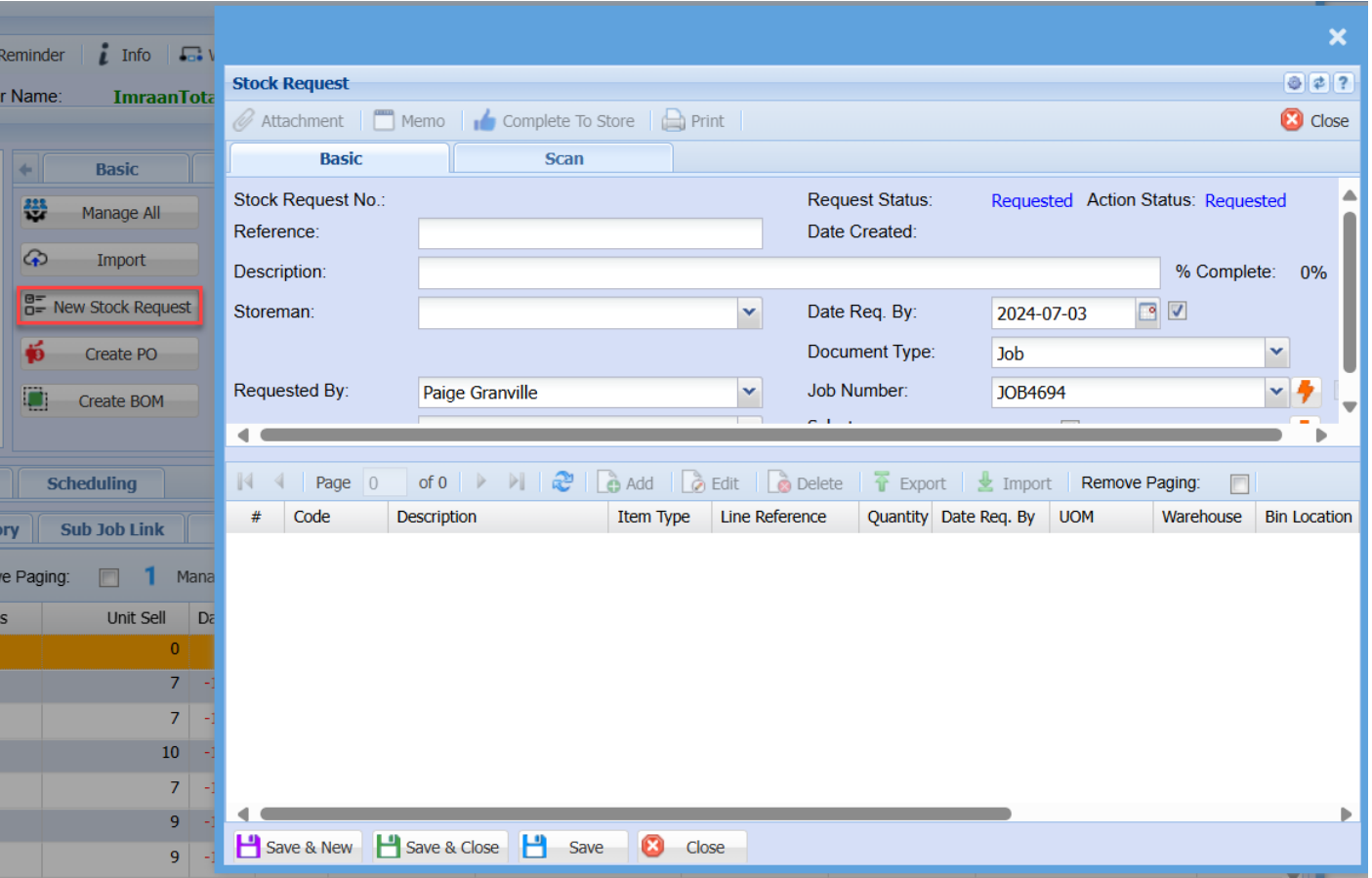
Complete	
----------	--

Import Button



File	
Multiply Qty	
Upload	
Show Errors	

New Stock Request



Basic Tab

Complete To Store	
Stock Request No	
Reference	
Description	
Storeman	
Requested By	
Sort By	
Date Req. By	
Document Type	
Job Number	
Select	

Scan Tab

Scan Barcode	
Last Item	
Last Result	
Scan Log	

Create PO

Reminder

Info

Name: ImraanTota

Basic

Manage All

Import

New Stock Request

Create PO

Create BOM

Scheduling

Sub Job Link

Paging: 1

Unit Sell

De

0

7

7

10

7

9

Create PO

Grouping: ☐ None ☒ Supplier

Description:

Supplier: Update

Show Not Started: ☒ Show No Supplier: ☐

Page 1 of 1

Displaying 1 - 14 of 14

	#	Item Code	Item Description	Supplier	Qty
☐	1	JOB	Job Estimate	Rectron	0
☐	2	JOB	Job Estimate	Rectron	0
☐	3	JOB	Job Estimate	Rectron	0
☐	4	JOB	Job Estimate	Rectron	0
☐	5	JOB	Job Estimate	Rectron	0
☐	6	JOB	Job Estimate	Rectron	0
☐	7	JOB	Job Estimate	Rectron	0
☐	8	19-04/3048510 ...	Screws 55mm 12gT17 GullGrey500	STEELBANK STAINLESS & ALUMINI...	0
☐	9	JOB	Job Estimate	Rectron	0
☐	10	JOB	Job Estimate	Rectron	0
☐	11	HW/CASE	HW Case	STEELBANK STAINLESS & ALUMINI...	0
☐	12	HW/CPU	HW CPU I7	Rectron	0
☐	13	22-01/3220931	Bend 80mm Grey Friars 90deg test	STEELBANK STAINLESS & ALUMINI...	0
☐	14	10	Glue Stick	Rectron	0

Create POsClose

Grouping	Select None or Supplier
Description	
Supplier	
Show Not Started	
Show No Supplier	
Create POs	

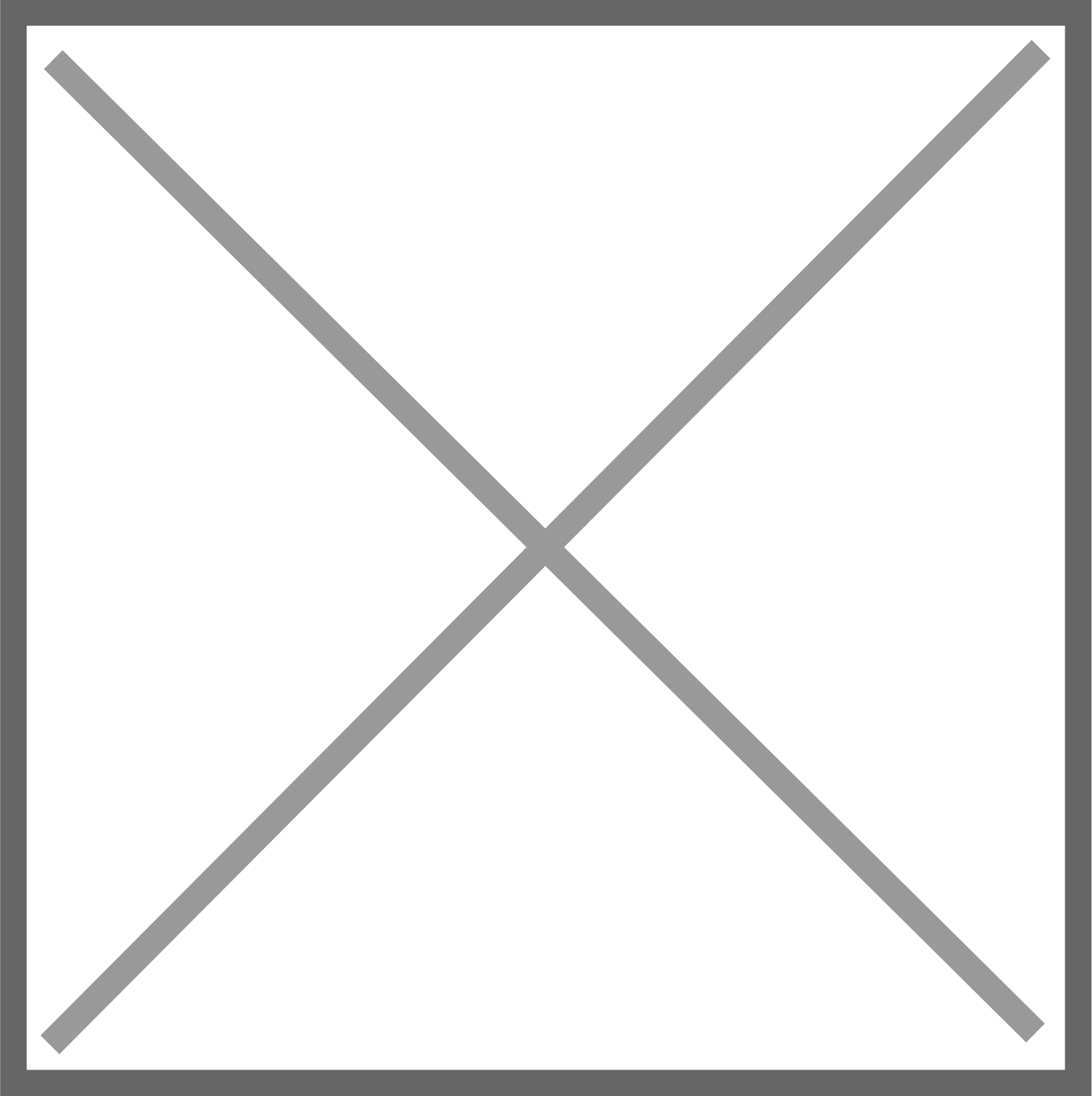
Progress Tab

The Progress tab gives summary totals based on the scheduling task values

Total Sell Budget	This figure is first inserted when you promote the quote to a job - It is the total sell value excluding of quote You can manually update this figure
Total Cost Budget	This figure is first inserted when you promote the quote to a job - It is the total cost value excluding of quote You can manually update this figure
Activity Job Progress %	This is the sum total of the percentage entered into the schedule tab for task activity groups as a percentage complete
Activity Sell Budget Sum	This is the sum total of the values entered into the schedule tab for task activity groups
Invoiced to date	This is the sum total of all the actual invoices processed - Value shows as the sell excluding
Potential to invoice	This is the same difference between the activity sell budget less the invoice to date figure
Invoiced % to date Sum	This is the sum total of the percentage entered on the task activity
Value to Invoice	This is worked out as the value to invoice based on the invoice percentage selected on the task activity lines
Total Hours	Manually entered by user to give total hours required for job

Click on the lightning bolt button to update the total sell budget and total cost budget from the first quotation.

Click on the calc button to update all the figures in the progress tab.



Job Search WIP O/S

On one of the columns, there is a field that is called WIP O/S

This means Work In Progress Outstanding items in not started state

This will count the number of line items in the job that are in a Not started state.

This number indicates that there are items within the job that are not managed and therefore not in WIP

The text value will display in red

If there is no lines and the value is zero, the field will be blank

