Jobs
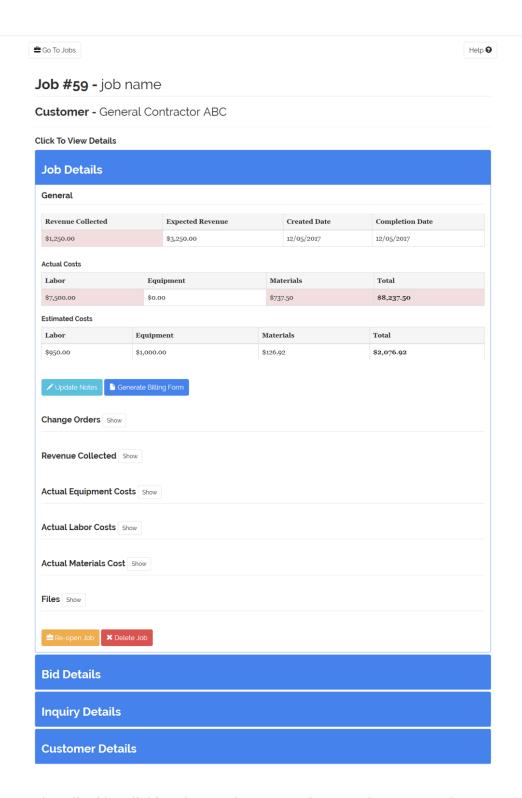
Main

When first accessing the Jobs page, you will see:

As with the Customer, Inquiry, and Bid tables, this table can be sorted by clicking on the desired category in the top row. You can select a Job by clicking anywhere in its row. In-progress Jobs appear in blue and completed Jobs appear in green.
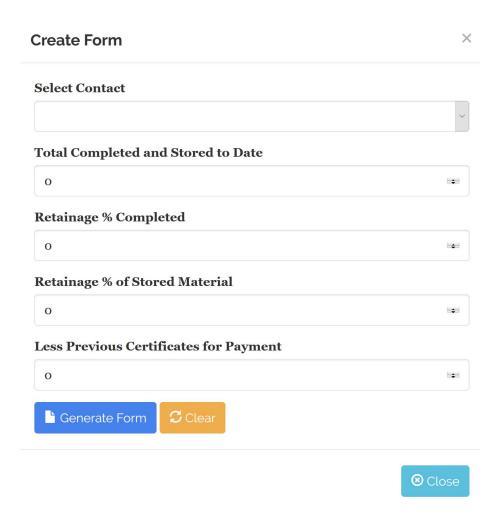
Job Details:

The job details page shows financial information in addition to the option to update notes, generate billing form, show associated change orders, revenue collected, actual equipment costs, actual labor costs, actual material costs and attached files.

Go To Jobs

Help ?

Job #59 - job name

Customer - General Contractor ABC

Click To View Details

Job Details

General

Revenue Collected	Expected Revenue	Created Date	Completion Date
$1,250.00	$3,250.00	12/05/2017	12/05/2017

Actual Costs

Labor	Equipment	Materials	Total
$7,500.00	$0.00	$737.50	$8,237.50

Estimated Costs

Labor	Equipment	Materials	Total
$950.00	$1,000.00	$126.92	$2,076.92

Update Notes   Generate Billing Form

Change Orders Show

Revenue Collected Show

Actual Equipment Costs Show

Actual Labor Costs Show

Actual Materials Cost Show

Files Show

Re-open Job   Delete Job

Bid Details

Inquiry Details

Customer Details

The notes can be edited by clicking the "Update Notes" button. The "Expected Revenue" value

comes directly from the total bid price plus desired profit margin. The rest of the Job page is

shown to the left. Similar to the Bid page, you will have to "Show" and "Hide" the other menus to expand and collapse them.

Change orders will be reflected in the "Expected Revenue" value. Revenue Collected is entered as a dollar amount. Refer to the directions in the Equipment section of the manual for help entering additional equipment, labor, or material costs. Actual costs are entered the same way as the estimated costs. Files can be uploaded just as with Bids. A Job can be "completed" by clicking the "Finish Job" button. You can navigate to the associated Bid, Inquiry, and Customer via the Details tabs at the bottom of the page. You may generate a billing form for a job, by pressing the "Generate Billing Form Button", this will cause a dialog box to popup:

Create Form ✕

Select Contact

> ⌄

Total Completed and Stored to Date

> 0

Retainage % Completed

> 0

Retainage % of Stored Material

> 0

Less Previous Certificates for Payment

> 0

📄 Generate Form   ⟳ Clear

⊗ Close

In this box you may select the contact, enter in the total completed and stored to date, the retainage percentage of the job, the retainage percentage of the stored material associated with the job, and less previous certificates of payment. After you have filled in all necessary fields, you may press the :Generate Form" button, this will generate the form and download it as a pdf. For help regarding downloading files, please refer to the help pages of the browser you are using.

Below is a sample PDF that was generated:

APPLICATION AND CERTIFICATION FOR PAYMENT
AIA DOCUMENT G702

| To Owner: | General Contractor ABC 123 Address 65165 | Project: job name | Application Number: 59 | Distribution to: ___Owner ___Architecht ___Contractor |
| From Contractor: | Allied Waterproofing 5840 Mango Drive St. Louis MO 63129 | Via Architect: Bill | | |

Contractor's Application for Payment
Application is made for payment, as show below, in connection with the Contract. Continuation Sheet, AIA Document G703 is attached

The undersigned Contractor certifies that to the best of the Contractor's knowledge, information and belief the work covered by this application for payment has been completed in accordance with the contract documents, that all amounts have been paid the contractor for work for which previous certificates of for payment were issued and payments received from the owner, and that current payment shown herein is now due

1. Original Contract Sum $2250
2. Net change by change orders $1000
3. Contract sum to date (lines 1+/-2) $3250
4. Total completed and stored to date $5
5. Retainage:
6. ___% Completed $5
7. ___% Of Stored Material $5
8. Total Retainage   10
9. Total Earned Less Retainage $0
10. Less Previous Certificates for Payment $5
11. Current Payment Due $0
12. Balance to Finish, Including Retainage $3250

Contractor:
By: _____   Date: _____