

Overview

With the release of SedonaOffice version 5.2 build 27, many new features are available with the area of job management. This document will cover the new *Job Task List Override* functionality. This document is divided into three areas; *Functionality*, which will describe the intended design of this new feature, *Setup*, which describes the setup that must be accomplished prior to using this new feature and *Process*, which describes how to use this new feature.

Functionality

A new form is available on the job type setup that allows you to have a primary task list and create an override task list for the same job type. An override task list would typically be used when the task list for the same type of installation by vary one situation to another. The best example would be a system installation that may require tasks for pre-wiring the site and in other situations you may not need to perform a pre-wire. In this scenario you would define the primary task list for the situation that would occur in most often. You would then create an override task list to fit the other installation situation. When a new job is created, the user will have the option of keeping the primary task list or switching to the override task list assigned to the job type.

Setup

From SedonaSetup open the Job Type for which you want to create an override task list. At the lower left of the Detail form is a new checkbox labeled *Allow Override Task List*. Once you select this checkbox, a new form will appear to the right of the Job Tasks form labeled *Override Job Tasks*. When you navigate to the Override Job Tasks form you will see a list of all the Job Tasks that were on the Job Task form for this job. You may modify this list by removing or adding additional tasks. Press the Apply button when you are finished with working on the Override Job Tasks.

The screenshot shows the 'Job Type Setup' window. The 'Job Type' is 'COM New Install' and the 'Description' is 'Commerical Burq New Install'. The 'Override Job Tasks' tab is selected and highlighted in yellow. The 'Allow Override Task List' checkbox is checked and highlighted in yellow. The form contains various fields for setup, including Category (Installation), Hold Back %, Material WIP (12020), Hold Back Item (Job Retentions), COGS Acct (51000), Hold Back Acct (13010), Use COGS Acct (51999), Est LU Cost (60), When Amt >= (10000000), Misc WIP (12050), Accrued Income, Lease, Force Part Reconciliation, Allow Costing to Closed Jobs, Expense Part When Issued, Percentage Invoicing, and Zero Part Price. Buttons for Apply, New, Copy, and Delete are at the bottom.

Process

Once you have created Override Job Tasks you will be able to use them on a new job. When entering information on the Work Order form, you will see the new Override Primary Task List checkbox displayed in the lower left area of the form. Select this option if you want to use the Override Task list. If this box is not selected, the Primary Task List will be used for the job.



You must make the correct decision whether to use the Override Job Tasks *prior* to pressing the Apply button on the Work Order form. Once the Apply button is pressed, you will not be able to go back and select this option.

You may now press the Job Task List button; the tasks displayed will be the Override Tasks assigned to your job type. If the job type selected for the job requires Job Approvals, you will not be able to view the Override Task List until the approval has been signed-off to release the job for processing.

Work Order Entry Locked

Job Information

Job Number	<input type="text" value="349"/>	Prevailing Wage	<input type="text"/>
Job Type	<input type="text" value="COM New Install NJA"/>	Project Manager	<input type="text"/>
Description	<input type="text" value="Commerical Burg New Install"/>	Salesperson	<input type="text" value="Ethan Easterwood"/>
Tax Group	<input type="text" value="AB"/>	P.O. Number	<input type="text"/>
Branch	<input type="text" value="Edmonton"/>	Sold Date	<input type="text" value="10/19/2008"/>
Hold Back %	<input type="text" value="0"/>	Projected Start	<input type="text" value="11/2/2008"/>
Install Company	<input type="text" value="Edmonton"/>	Projected End	<input type="text" value="11/2/2008"/>
Installer	<input type="text"/>		

Permits Required

Permit 1

Permit 2

Override Primary Task List

Notes