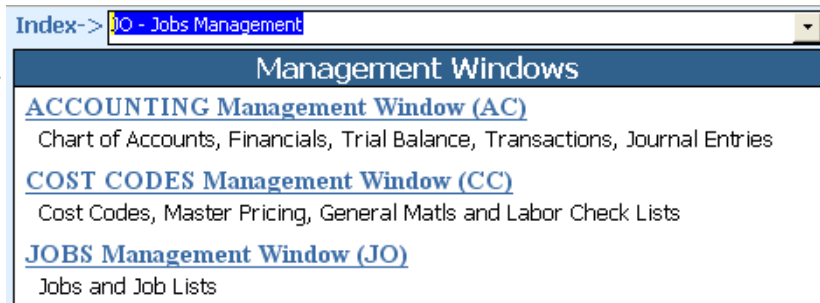


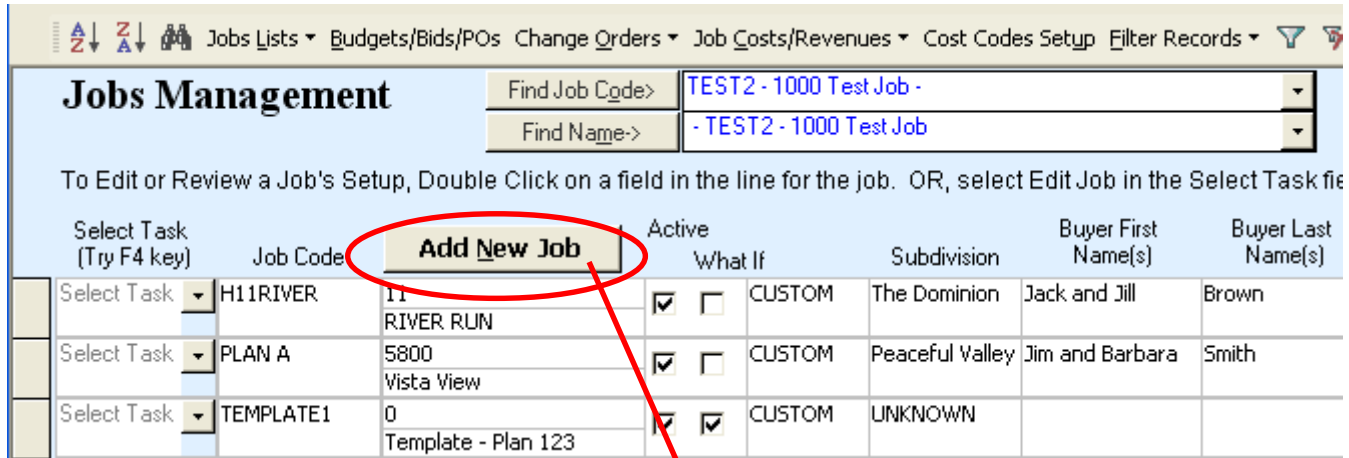
# Setting up Jobs

To set up or edit Jobs, click the Jobs Management Window link on the Navigation window. (OR type JO into the Index field and press your Enter key.)

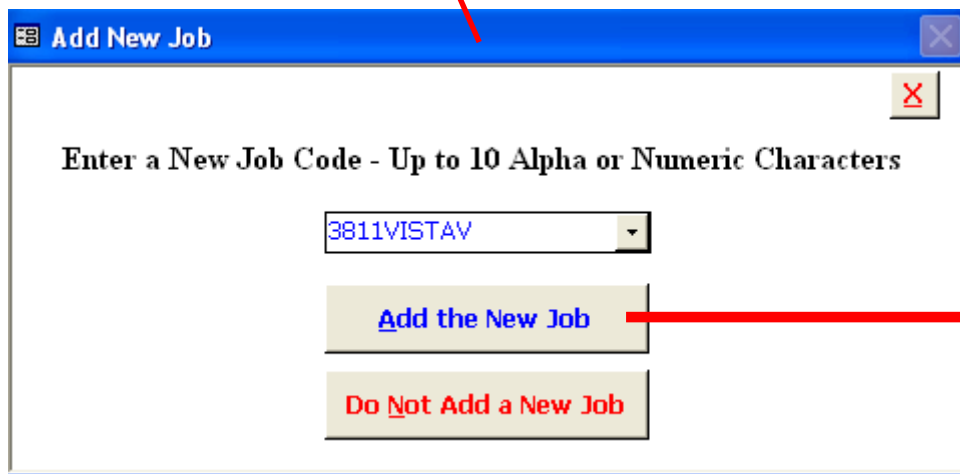


On the Jobs Management window that opens, click the button labeled 'Add New Job' to set up a new job.

OR, to EDIT a job, find and double click on a job in the list.



See separate Help document about the Job Management Window to learn more about features on the Job Management window.



**On the window that pops up, enter a JOB CODE that identifies the job.** The Job Code can be up to 10 characters and can be either numerical or text. Duplicate Job Codes are not allowed. Job Codes that have already been used can be viewed by using the drop down button in the text box. Some builders use part of the job address as the job code. Others use customers' names, and others use a sequence of numbers. Keep in mind that reports of job lists will be printed in Job Code order.

A Job Code is required for all entries in the accounting books. Therefore, a default job code that is just an "H" has been set up by the program. This "H" job code will be used if the entry you are posting does not pertain to a job. You might think of the "H" code as the internal "House" code (or "overhead" code), referring to your company.

## Setting Up Jobs - continued

After a Job Code is entered on the window shown on the previous page, the window below will open. The fields on this window are described on the next few pages.

Find (try F4)-> **3811VISTAV**   **Add New Job**   **Copy This Job to a New Job**   **Delete?**   **Sales Price?**   **Home**   **X**

**Change Code**    Active (Show in Data Entry Lists)    What If or Job Template Only   **Activities / Notes**

JOB CODE	STR NUM	STREET NAME(or Job name)	LOT	BLK	SEC	SUBDIVISION
<b>3811VISTAV</b>	3811	Vista View	3	5	IV	Peaceful Valley
CITY	Austin	ST	TX	ZIP	78704-	
PERMIT #	12345678		Lot 3, Block 5, Sec IV in the Peaceful Valley subdiv			
FLOORPLAN	Plan B					
Department	Type (can type in new one)	Manager (can type)		Status	Closing Posted	
CH	+ CUSTOM	George Brown		SOLD	UNPOSTED	

**CUSTOMER: Select ID->** **SMALLGEORG**   + Setup Customer

1st NAME	George and Mary	LAST NAME	Small
HOME	(512) 222-2222	Ext.	
WORK 1	(512) 333-3333	FAX 1	(512) 444-4444
WORK 2	(512) 555-5555	FAX 2	(512) 666-6666
MOBILE 1	(512) 777-7777	MOBILE 2	
EMAIL	georgesmall@somewhere.com		

To change Phone #'s and email for the customer above, use the +Setup Customer button to the right of the Customer ID.

LENDERS AND TITLE COMPANY		Phone #'s
Interim Lender	Compass Bank	(512) 888-8888
Int Lender Contact	Bill Brown	Fax-> (512) 999-9999
Int Loan Number	112233445	
Lender Email	bill@somewhere.com	
Title Company	Alamo Title Company	(512) 000-0000
Permanent Lender	Homeside Lending	(512) 111-1111

For various Lists of Jobs, select the JOBS button on the Navigation screen. Then use the button labeled Job Lists on the toolbar. OR, look for Jobs Lists in the Index on the Navigation screen.

Use Activities/Notes button to store activities, messages, and "To Do's" related to the job.....>

**DATES (type 6 numbers- ddmmyy)**

START	11/15/06	TO CLOSE	03/31/07
SOLD	10/26/06	CLOSED	

**MISCELLANEOUS INFO**

Sales Tax Rate to Buyer->	0.00%
Retention Percent->	0.00%
Sales Tax Alert in Payables?	No

Directions to Site-Use tab key to move out of field  
Take exit 251 and then the next right to Vista View

**NOTES - Use Tab key to move out of field**

**Job Specs Measurements**

#Bedrooms	#Baths
3.0	3.5

**Add Measure Line**

Priority #	MEASURE	QUANTITY
Del 1	Frame SF	5298
Del 2	Living SF	4268
Del 3	Slab SF	3822
Del 4	Covered SF	6011
Del 5	Porch1 SF	825
Del 6	Garage SF	918
Del 99	Roof SF	2700
Del 99	Roof Slope	6

Measure Codes   Default Priority Meas

Restore Priority Measures

**Fantastic Builder, Inc.**

## Setting Up Jobs - continued

The fields on this part of the Job Setup window are described below and on following pages.

**Add or Edit Job / Job Setup**

Find (try F4)-> 
**Add New Job**
**Copy This Job to a New Job**
**Delete?**
**Sales Price?**

**Change Code**
 Active (Show in Data Entry Lists)
 What If or Job Template Only
**Activities / Notes**

JOB CODE	STR NUM	STREET NAME(or Job name)		LOT	BLK	SEC	SUBDIVISION
3811VISTAV	3811	Vista View		3	5	IV	Peaceful Valley
CITY Austin				ST TX	ZIP 78704-		Legal Description
PERMIT # 12345678				Lot 3, Block 5, Sec IV in the Peaceful Valley subdiv			
FLOORPLAN Plan B							
Department		Type (can type in new one)		Manager (can type)			
CH		CUSTOM		George Brown			
<b>CUSTOMER: Select ID-&gt;</b>		SMALLGEORG		+ Setup Customer			
1st NAME	George and Mary		LAST NAME	Small			
HOME	(512) 222-2222		Ext.				
WORK 1	(512) 333-3333	111	FAX 1	(512) 444-4444			
WORK 2	(512) 555-5555		FAX 2	(512) 666-6666			
MOBILE 1	(512) 777-7777		MOBILE 2				
EMAIL	georgesmall@somewhere.com						

To change Phone #'s and email for the customer above, use the +Setup Customer button to the right of the Customer ID.

LENDERS AND TITLE COMPANY		Phone #'s
Interim Lender	Compass Bank	(512) 888-8888
Int Lender Contact	Bill Brown	Fax-> (512) 999-9999
Int Loan Number	112233445	
Lender Email	bill@somewhere.com	
Title Company	Alamo Title Company	(512) 000-0000
Permanent Lender	Homeside Lending	(512) 111-1111

For various Lists of Jobs, select the JOBS button on the Navigation screen. Then use the button labeled Job Lists on the toolbar. OR, look for Jobs Lists in the Index on the Navigation screen.

DATES (type 6 numbers- ddmmyy)	
START	11/15/06 TO CLOSE 03/31/07
SOLD	10/26/06 CLOSED

MISCELLANEOUS INFO	
Sales Tax Rate to Buyer->	0.00%
Retention Percent->	0.00%
Sales Tax Alert in Payables?	No

Directions to Site-Use tab key to move out of field  
Take exit 251 and then the next right to Vista View

NOTES - Use Tab key to move out of field

Use Activities/Notes button to store activities, messages, and "To Do's" related to the job.---->

**Fantastic Builder, Inc.**

**Check Box: Active (Show in Data Entry Lists)** - When this box is checked, the job will be available in all drop down selection boxes during data entry. When this box is unchecked, the job is basically marked as “inactive” and will not show up in most data entry drop down lists that are used for job selection.

**Check Box: What If or Job Template Only** - Check this box if the job being set up is not an actual job. “What If” jobs will be in the drop down selection lists for job budgets so that you can set up job budgets for speculative uses, OR to use for copying similar budgets to actual jobs. If the “What If” job later becomes an actual job, you can uncheck the box, and it will become available on data entry screens.

**JOB CODE** - The job code is set up as described at the beginning of this help document. The field is locked on the above window. IF the job code needs to be changed, use the button above the Job Code field labeled ‘**Change Code**’. A record of the change will be sent to an Audit table. If a Job Code is changed, all records in the database that used the original job code will be changed to the new job code.

**STR NUM and STREET NAME** - Enter the Street Number and the Street Name for the job’s address separately in their respective fields. The reason for this is to allow selection, sorting, and filtering of job records by Street Name in other areas of the program..

## Setting Up Jobs - continued

**LOT, BLK, and SEC** - Enter the Lot number, Block number, and Section number for the job location in these fields.

**SUBDIVISION** - Select a Subdivision from the drop-down list of subdivisions that you have set up. To add a new subdivision, use the plus “+” button to the right of the subdivision field. This will open a self-explanatory screen for setting up Subdivisions. [Please do not attempt to delete the “UNKNOWN” subdivision. It is used as a default by the program.](#)

**ALTERNATIVE:** You can use the Subdivision field to identify a project (such as a group of Town Homes), etc. There is a Variance report that can be printed based on all jobs within a “Subdivision”.

**CITY, ST, and ZIP** - Enter the City, State, and Zip Code of the job’s location.

**PERMIT #** - Optional: Enter the permit number if you wish.

**FLOORPLAN** - Optional: Enter the name of a floorplan if you wish.

**Legal Description** - Enter the legal description for the job’s location (up to 255 characters). The legal description will print on various reports (like Purchase Orders, Waivers of Lien, etc.).

**Department** - Select a Department that this job will be associated with for Profit and Loss reports. When a job is selected during data entry in other areas of the program, the department selected here will automatically drop in and attach to the record. (See Help Document about setting up departments under Accounting.)

**Type (can type in new one)** - Select a Type like Custom, Model, Spec, or Remodel from the drop down list. (OR type in a new one and it will be added to the drop down list.)

**Manager (can type in new one)** - Select a Job Manager from the drop down list. (Or type in a new one and it will be added to the drop down list.)

**Status** - Choices in the drop down list for Status are “INVENTORY”, “SOLD”, “CLOSED”, and “WHAT IF”. INVENTORY is for unsold jobs. SOLD is for jobs under contract. CLOSED is for closed jobs. WHAT IF is for a job that is not an actual house to be built (at least, not yet).

**Closing Posted** - When you use the Job Closing screen to close a job on your books, the program will change this field to POSTED. However, you may change the closing status to POSTED if you prepared the job closing journal entries yourself. A POSTED status will trigger an alert when entering invoices that the job closing has been posted, with a suggestion to post the invoice directly to Cost of Sales.

**CUSTOMER: Select ID** - If the job is SOLD, select the customer from the drop down list. To add a new customer, use the button to the right of the field labeled ‘+ **Setup Customer**’. (See Help documents about setting up customers that are available on the window that will pop up.) After a Customer ID is selected on the Job Setup window, the associated phone numbers and email for the customer will drop into those fields on the Job Setup window.

**BUYER 1ST NAME and LAST NAME** - Enter the buyer(s)’ first and last names in separate fields. This is so the program can display just the last name on reports or drop down lists that do not have room for both first and last customer names.

**Phone Numbers and EMAIL** - The phone and email fields are in black because they are locked on the Job Setup window. This is because they must be changed on the Customer Setup window. To change them, use the button labeled ‘+ **Setup Customer**’ to open the Customer Setup window.

**DATES :**

## Setting Up Jobs - continued

START - Date Construction begins

SOLD - Date contract is signed

TO CLOSE - Date job expected to close

CLOSED - Date Closing papers signed

Coordinate the Dates with the Status of the Job. For example, if you enter a CLOSED date, the STATUS should be changed to CLOSED. Dates should be entered as six numerical digits. Example: For November 15, 2006, type 111506.

**Sales Tax Rate to Buyer** - Enter a decimal number (ex: .10 for 10%) for the Sales Tax rate to be charged to the customer. This Sales Tax Percent will then become available for use on the Job Budget screen.

**Retention Percent** - The Retention Percent is used to calculate the amount of retainage to withhold from the “Costs + Markups” draw request billing sheets. Enter a percent here ONLY if you are required to withhold a retainage percent from your billings. (Enter the amount as a decimal number; ex: .10 for 10%)

**Sales Tax Alert in Payables?** - Select “Yes” to trigger Pop Up alerts when entering bills to pay. The alert will suggest that user should check the sales taxes on the vendor’s bill.

**Interim Lender , Phone #'s, Int Lndr Contact, Int Loan Number, and Lender Email** - Enter the interim lender name, phone, fax number, contact name, loan number, and email. This information is used on Draw Requests.

**Title Company, Permanent Lender and Phone #'s** - Optional. The Title Company and Permanent Lender fields are for information if you wish to use them.

**Directions to Site**- Optional. Type as much info as needed to give directions to the job site. These directions will print on Purchase/Work Orders. Use the {TAB} key on your keyboard to exit this field.

**NOTES** - Optional. Enter as much additional information as you like in this field. Use the {TAB} key on your keyboard to exit the field.

**NOTE!** It’s a good idea to use the Activities button (looks like a note pad) to keep track of notes about the job. See Help documents about the Activities on the Activities window that will open.

Go to next page for information about **Jobs Specs Measurements**.

## Job Specs Measurements

On the right side of the Job Setup window is an area for entering Job Specs and Measurements. Those features are described on this page.

Priority #	MEASURE	QUANTITY	
Del	1	Frame SF	5298
Del	2	Living SF	4268
Del	3	Slab SF	3822
Del	4	Covered SF	6011
Del	5	Porchl SF	825
Del	6	Garage SF	918
Del	99	Roof SF	2700
Del	99	Roof Slope	6

# **Bedrooms, # Baths** - Enter the number of bedrooms and baths. If you have 3 1/2 baths, enter 3.5.

**Priority #, Measure, Quantity** - Enter as many Measurement specification lines as needed by using the button labeled **“Add Measure Line”**. The first six lines will be used as **“Priority Measures”** meaning they will print at the top of various budget and cost reports. Set up a **“default”** group of Priority Measures that will drop in for new jobs by using the **Default Priority Meas** button. (screenshot below)

The measure quantities from this screen will be supplied to a job’s budget when the same Measure Code is selected for cost lines on the job’s budget worksheet. (Also, see Costs Codes Setup help document for explanation about setting up pricing default measure codes to supply quantities from the job setup window to a job’s budget.)

Many MEASURE codes have been supplied by the program, and will be available in the drop down list for MEASURE. However, you may add other MEASURE CODES by using the button labeled **‘Measure Codes’** towards the bottom of the window.

To **Delete** a Measure Line, use the button labeled **‘Del’** in red to the left of a measure line.

If you somehow Delete ALL of the measure lines, please use the button labeled **‘Restore Priority Measures’** to return lines for the six priority measures to the window. These are needed on job budget reports, (and others).

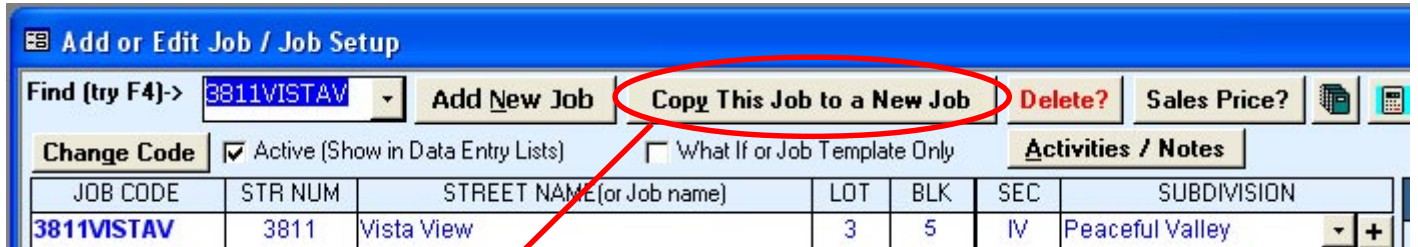
If the button labeled **‘Default Priority Meas’** is used, the window below will open. Use the Priority numbers 1 to 6 to order the measures. Select corresponding measure codes. These will be used as the **“default”** six priority measures that will drop in when a new job is set up. However, they CAN be overwritten for each job.

Priority Number	Measure Code
1	Frame SF
2	Living SF
3	Slab SF
4	Covered SF
5	Porchl SF
6	Garage SF

Priority Measurements will display on various Budget and Cost reports for a job. The ones selected here will be the default Priority Measures for setting up a new job. Priority Measurements can be overwritten for each job.

## Copy Job To A New Job

A job's information can be copied to a new job by using the button labeled 'Copy This Job to a New Job' at the top of the job setup window.



Find (try F4)-> 3811VISTAV Add New Job Copy This Job to a New Job Delete? Sales Price? Activities / Notes

Change Code  Active (Show in Data Entry Lists)  What If or Job Template Only

JOB CODE	STR NUM	STREET NAME (or Job name)	LOT	BLK	SEC	SUBDIVISION
3811VISTAV	3811	Vista View	3	5	IV	Peaceful Valley



Copy Job Data to New Job

Copy Setup Data from Job-> 3811VISTAV

To (Enter New Job Code)-> 3910VISTAV

Job Codes In Drop List should not be Selected. For Review Only.

Copy and Create New Job

Do Not Copy Job

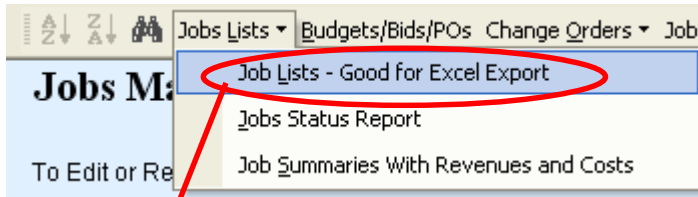
Enter the new job code in the 'To (Enter New Job Code)' field. (If program beeps when you start to type, keep trying.) Then click the button labeled 'Copy and Create New Job'.

Most of the information from the previous job will be copied to a new job. The new job will then display on the Job Setup window. Change information for the new job as needed.

## Deleting a Job

See separate Help Document about deleting a job.

# Print Lists of Jobs



To print Lists of Jobs, use the Jobs Management window link on the Navigation/Home window. On the toolbar at the top of the window, click 'Jobs Lists'. Then click the selection labeled 'Job Lists - Good for Excel Export'.

Information about the window shown below can be found in the Help documents about Job Lists.

REPORTS--> Sorted Lists ▾ Grouped Lists ▾ Lists Based on Dates Selected ▾ Go To Jobs Management ▾

### Basic Jobs Lists and Reports

Use the Toolbar at the top of the window to view CHS Job List Reports.

NOTE: Most of the reports available on the toolbar at the top of this screen will need to be set to Landscape orientation after they are opened. Use the Page Setup button on the toolbar after the report is opened to do this.

	From	To	Reset	View All	From	To	Reset
<b>JOBS</b>	3811VISTAV	TEST2	Reset	<b>TYPE</b>	CUSTOM	CUSTOM	Reset
<b>SUBDIVISION</b>	Peaceful Valle	UNKNOWN	Reset	<b>JOB MANAGER</b>	George Browr	Tamara King	Reset
<b>CUSTOMER</b>	BLACKJOHN	SMITHJIMBA	Reset	<b>ACTIVE?</b>	No	Yes	Reset
<b>FLOORPLAN</b>	NONE	Plan B	Reset	<b>WHAT IF?</b>	Yes	No	Reset
<b>STATUS</b>	INVENTORY	SOLD	Reset	<b>DATES</b>	05/01/98	04/26/18	Reset

Save As Excel Spreadsheet

To make changes to the job's setup record, Double Click on the Edit Field for a job in the list below.

Job Code	Edit	Active	What If	Buyer	Str Num	Str Name	City	St.	Zip	Liv SF	Bedrooms	Baths	Status	
▶ 3811VISTAV	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Small, George and Mar	3811	Vista View	Austin	TX	78704-	0	3.00	3.50	SOLD	CUS
DemoJob	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	,	0					0	0.00	0.00	INVENTORY	CUS
H11RIVER	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brown, Jack and Jill	11	RIVER RUN	City of the Hill	TX		0	5.00	3.50	SOLD	CUS
PLAN A	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Smith, Jim and Barbara	5800	Vista View	Austin	TX	78704-	0	3.00	3.50	SOLD	CUS
TEMPLATE1	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	,	0	Template - Plan 1				0	0.00	0.00	INVENTORY	CUS
TEST1	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Black, John and Sue	2900	Gibson St.	Austin	TX	78704-	0	0.00	0.00	SOLD	CUS
TEST2	Edit	<input type="checkbox"/>	<input type="checkbox"/>	,	1000	Test Job				0	0.00	0.00	INVENTORY	CUS

Record: 1 of 7