

## Jobs Management Window - Screenshot

The Jobs Management window can be used to add/edit jobs AND to navigate to various job costing features available in the program. To open this window, click the “Jobs Management Window” link on the Navigation/Home window. The next few pages in this help document will describe the features on this window.

CHS-Custom Homebuilders Solutions - [CHS]
Type a question for help

Jobs Lists ▾ Budgets/Bids/POs Change Orders ▾ Job Costs/Revenues ▾ Cost Codes Setup Filter Records ▾ Remove Filter/Sort ▾

### Jobs Management

Find Job Code>

Find Name->

[Home](#)

To Edit or Review a Job's Setup, Double Click on a field in the line for the job. OR, select Edit Job in the Select Task field to the left of the job's line.

Select Task (Try F4 key)	Job Code	<b>Add New Job</b>	Active What If	Subdivision	Buyer First Name(s)	Buyer Last Name(s)	Status	Date Started	Date Sold	Date Closed
▶ Select Task ▾	3811VISTAV	3811 Vista View	<input checked="" type="checkbox"/> <input type="checkbox"/>	CUSTOM	Peaceful Valley	George and Mary Small	SOLD	15-Nov-06	26-Oct-06	
Select Task ▾	DemoJob	0	<input checked="" type="checkbox"/> <input type="checkbox"/>	CUSTOM	UNKNOWN		INVENTORY			
Select Task ▾	H11RIVER	11 RIVER RUN	<input checked="" type="checkbox"/> <input type="checkbox"/>	CUSTOM	The Dominion	Jack and Jill Brown	SOLD	01-Dec-01	15-Nov-01	
Select Task ▾	PLAN A	5800 Vista View	<input checked="" type="checkbox"/> <input type="checkbox"/>	CUSTOM	Peaceful Valley	Jim and Barbara Smith	SOLD	15-Nov-06	26-Oct-06	
Select Task ▾	TEMPLATE1	0 Template - Plan 123	<input checked="" type="checkbox"/> <input checked="" type="checkbox"/>	CUSTOM	UNKNOWN		INVENTORY			
Select Task ▾	TEST1	2900 Gibson St.	<input checked="" type="checkbox"/> <input type="checkbox"/>	CUSTOM	The Dominion	John and Sue Black	SOLD	15-Jul-06	28-Jun-06	
Select Task ▾	TEST2	1000 Test Job	<input type="checkbox"/> <input type="checkbox"/>	CUSTOM	Peaceful Valley		INVENTORY			

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Record: ⏪ ⏩  ▶▶▶\* of 7

## Opening the Jobs Management Window

To open the Jobs Management window, click the Jobs Management Window link on the Navigation/Home window. OR, just type JO into the Index text box and press the Enter key on your keyboard.

**CHS Navigation (Home)**

**Fantastic Builder, Inc.**

C:\CHS 2006 Tutorials\00\_CHSProgramFiles\CHS2006DemoData.mdb  
Monday, April 28, 2008

Latest Record (Click to Refresh)  
Friday, March 07, 2008

[Open Different Company](#)   [Users and Passwords](#)   [Restrict Access](#)   [CHS Program Updates](#)   [Performance Tips](#)   [Help Manuals](#)  
[Steps to Setup Program](#)   [Log In Different User](#)   [Company Master](#)   [Loan Payment Calculator](#)   [To Do List](#)   [Tutorial Movies](#)

Index-> **JO - Jobs Management**

Task Menu	Management Windows	Quick Add/Edit
<a href="#">View CHS Setup Steps</a>	<a href="#">ACCOUNTING Management Window (AC)</a> Chart of Accounts, Financials, Trial Balance, Transactions, Journal Entries	<a href="#">Chart of Accounts</a>
<a href="#">Job Budget, Bids, Costs (JB)</a>	<a href="#">COST CODES Management Window (CC)</a> Cost Codes, Master Pricing, General Matls and Labor Check Lists	<a href="#">Cost Codes</a>
<a href="#">Job Status, Scheduling (JS)</a>	<a href="#">JOBS Management Window (JO)</a> Jobs and Job Lists	<a href="#">Jobs</a>
<a href="#">Purchase Orders (PO)</a>	<a href="#">VENDORS and PAYABLES Management Window (AP)</a> Vendors, Lists, Payables Transactions, 1099's, Waivers, Insurance Audits	<a href="#">Vendors</a>
<a href="#">Change Orders (CO)</a>	<a href="#">CUSTOMERS / PAYORS and RECEIVABLES Mgt Window (AR)</a> Payors or Customers, Lists, Receivables Transactions, Invoices, Statements	<a href="#">Payors/ Customers</a>
<a href="#">Vendor Bills, Checks (BI)</a>	<a href="#">BANKING Management Window (BA)</a> Bank Account Balances, Reconciliations, Bank Ledgers, Deposits, Checks	<a href="#">Bank Accounts</a>
<a href="#">Current Payroll (PR)</a>	<a href="#">PAYROLL Management Window (PM)</a> Employees, Lists, Payroll Processing, W2s, 941, Unemp., Other PR Reports	<a href="#">Employees</a>
<a href="#">Draw Requests (DR)</a>	<a href="#">CONTACTS, Labels, Letters, Etc. Management Window (CN)</a> Contacts, Lists, Labels, Letters, Postcards, and Activity Reports	<a href="#">Contacts</a>
<a href="#">Accounts Receivable(AR)</a>	<a href="#">DOCUMENTS (DOX)</a> Tag or View Stored PDF Documents	
<a href="#">Bank Deposits (DP)</a>	<a href="#">UTILITIES (UT)</a> View Database, View Audit Table, Move Records, Etc.	
<a href="#">Trial Balance/Cash Flow (TB)</a>		
<a href="#">Job Closing Entries (JCE)</a>		
<a href="#">Close Books Year End (CBE)</a>		

HINT: Try holding down your Alt key and pressing the underlined letter in above links.

**Custom SOLUTIONS Homebuilders**

## Find a Job on the Jobs Management Window

To Find a job by its Job Code, start typing the Job Code into the 'Find Job Code' text box. Job Codes that match will auto fill into the field as you type. When the Job Code is found in the drop down list, just press the Enter key on your keyboard.

OR, use the 'drop down' button to scroll through a list of jobs. Click on the desired job.

Tip! Your F4 key will trigger a drop down list.

Jobs Management			
		Find Job Code>	H11RIVER - 11 RIVER RUN - Brown
		Find Name->	3811VISTAV - 3811 Vista View - Small DemoJob - 0 - H11RIVER - 11 RIVER RUN - Brown PLAN A - 5800 Vista View - Smith TEMPLATE1 - 0 Template - Plan 123 - TEST1 - 2900 Gibson St. - Black TEST2 - 1000 Test Job -
To Edit or Review a Job's Setup, Double Click on a field in			
Select Task (Try F4 key)	Job Code	<b>Add New Job</b>	Act
Select Task	3811VISTAV	3811	<input checked="" type="checkbox"/>

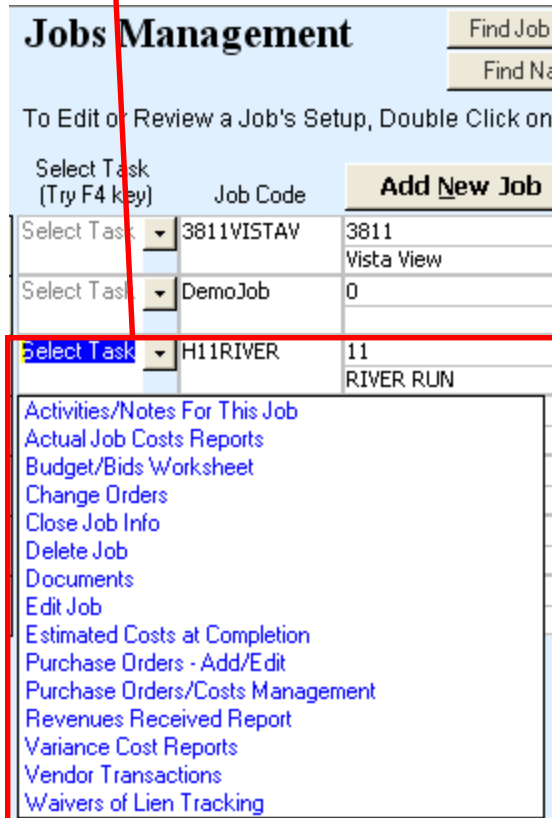
To Find a job by the customer name associated with the job, start typing the last name of the customer into the 'Find Name' text box. Customer last names that match what you are typing will auto fill into the field as you type. When the desired name is filled in, just press the Enter key on your keyboard.

OR, use the 'drop down' button to scroll through a list of jobs. Click on the desired job.

Jobs Management			
		Find Job Code>	H11RIVER - 11 RIVER RUN - Brown
		Find Name->	Brown - H11RIVER - 11 RIVER RUN - DemoJob - 0 - TEMPLATE1 - 0 Template - Plan 123 - TEST2 - 1000 Test Job Black - TEST1 - 2900 Gibson St. Brown - H11RIVER - 11 RIVER RUN Small - 3811VISTAV - 3811 Vista View Smith - PLAN A - 5800 Vista View
To Edit or Review a Job's Setup, Double Click on a field in			
Select Task (Try F4 key)	Job Code	<b>Add New Job</b>	Act
Select Task	3811VISTAV	3811	<input checked="" type="checkbox"/>
Select Task	DemoJob	in	

## Select Task for One Job

To the left of every job in the Jobs list, there is a 'Select Task' field. Use the drop down button to see tasks related to the job. Then click on the desired task. Tasks related to jobs on the Jobs Management window are briefly described below.



The screenshot shows the 'Jobs Management' window. At the top, there are buttons for 'Find Job' and 'Find Na'. Below that, a text instruction says 'To Edit or Review a Job's Setup, Double Click on'. The main area contains a table with columns for 'Select Task (Try F4 key)', 'Job Code', and 'Add New Job'. The table lists three jobs: 3811VISTAV (3811, Vista View), DemoJob (0), and H11RIVER (11, RIVER RUN). A red box highlights the 'Select Task' dropdown for the H11RIVER job, which is open, showing a list of tasks such as 'Activities/Notes For This Job', 'Actual Job Costs Reports', 'Budget/Bids Worksheet', 'Change Orders', 'Close Job Info', 'Delete Job', 'Documents', 'Edit Job', 'Estimated Costs at Completion', 'Purchase Orders - Add/Edit', 'Purchase Orders/Costs Management', 'Revenues Received Report', 'Variance Cost Reports', 'Vendor Transactions', and 'Waivers of Lien Tracking'.

Select Task (Try F4 key)	Job Code	Add New Job
Select Task	3811VISTAV	3811 Vista View
Select Task	DemoJob	0
Select Task	H11RIVER	11 RIVER RUN

Tip! Use the F4 key on your keyboard to trigger the drop down list for 'Select Task'.

**Activities/Notes For This Job** - Opens the Activities/Notes window. The Activities window will open displaying all activities/notes related to the job. See help documents for using the Activities/Notes features on that window.

**Actual Job Costs Reports** - Opens a menu window with several options for printing Job Cost Reports for ACTUAL job costs that have been posted to your accounting records.

**Budget/Bids Worksheet** - Opens the Budget Worksheet for the job. If a Budget Worksheet for the job has not been activated yet, a window will open with some options for opening the budget. See help documents about job budgets.

**Change Orders** - Opens a window that lists the Approved and Unapproved Change Orders for the job. The window also lists payments received for Change Orders for the job. That window can be used to Add or Edit Change Orders for the job.

**Close Job Info** - Pops up info about closing a job.

**Delete Job** - Pops up a window to verify that you want to delete the job. Use the information on that window and in Help documents about deleting a job.

**Documents** - Opens the Documents File Cabinet window to review stored PDF Documents.

**Edit Job** - Opens the setup window for the job. Use that window to edit information about the job. The same job setup window can be opened by double clicking on the job code or on the job address on the Jobs Management window.

**Estimated Costs at Completion** - Opens the Estimated Costs at Completion worksheet for the job. See Help documents about Estimated Costs At Completion.

**Purchase Orders - Add/Edit** - Opens the window to add or edit Purchase/Work Orders for the job. When the window opens, it will display all PO/WO's for the job. See Help documents on that window.

## Select Task For One Job - continued

**Purchase Orders/Costs Management** - Opens the Purchase/Work Orders And Job Costs Mgt Review Window. When the window opens, it will display a comparison list of PO/WO's and Actual Costs for the job. That window can be used to manage PO's and Costs. See Help documents on that window.

**Revenues Received Report** - Opens a quick report that lists Revenues that have been received for the job. Read the note at the bottom of the report for information on how the Revenues are gathered for the report.

**Variance Cost Reports** - This task FIRST opens the Estimated Costs At Completion Worksheet because calculations for that worksheet are used for variance cost reports. THEN, a window will pop up with a menu of various Variance Cost Reports. Variance Cost Reports are comparison reports that will help spot overages on job costs. See help documents on that window.

**Vendor Transactions** - Opens a window that will list all paid and unpaid bills that have been posted in Payables for the job. See Help documents on that window.

**Waivers of Lien Tracking** - Opens a window that lists all Waivers of Lien that have been posted to a tracking table for Waivers of Lien for the job. That window can be used to post that a Waiver of Lien has been signed and returned. See Help documents on that window.

## Using 'Double Click' to Edit Job

"Double Click" - Hold your cursor over desired Job Code, or any other field in the line, then quickly click your mouse button twice.

Double click on a Job Code, Address, or other fields to open the window to Edit that job.

**Jobs Management**

Find Job Code-> 3811VISTAV - 3811 Vista View - Small  
Find Name-> Small - 3811VISTAV - 3811 Vista View

To Edit or Review a Job's Setup, Double Click on a field in the line for the job. OR, select Edit Job in the Select Task field to the left of the job's line.

Select Task (Try F4 key)	Job Code	Add New Job	Active	What If	Subdivision	Buyer First Name(s)	Buyer Last Name(s)	Status	Date Started	Date Sold	Date Closed
Select Task	3811VISTAV	3811 Vista View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	Peaceful Valley	George and Mary Small	SOLD	15-Nov-06	26-Oct-06	
Select Task	DemoJob	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	UNKNOWN		INVENTORY			
Select Task	H11RIVER	11 RIVER RUN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	The Dominion	Jack and Jill Brown	SOLD	01-Dec-01	15-Nov-01	
Select Task	PLAN A	5800 Vista View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	Peaceful Valley	Jim and Barbara Smith	SOLD	15-Nov-06	26-Oct-06	
Select Task	TEMPLATE1	0 Template - Plan 123	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CUSTOM	UNKNOWN		INVENTORY			
Select Task	TEST1	2900 Gibson St.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	The Dominion	John and Sue Black	SOLD	15-Jul-06	28-Jun-06	
Select Task	TEST2	1000 Test Job	<input type="checkbox"/>	<input type="checkbox"/>	CUSTOM	Peaceful Valley		INVENTORY			

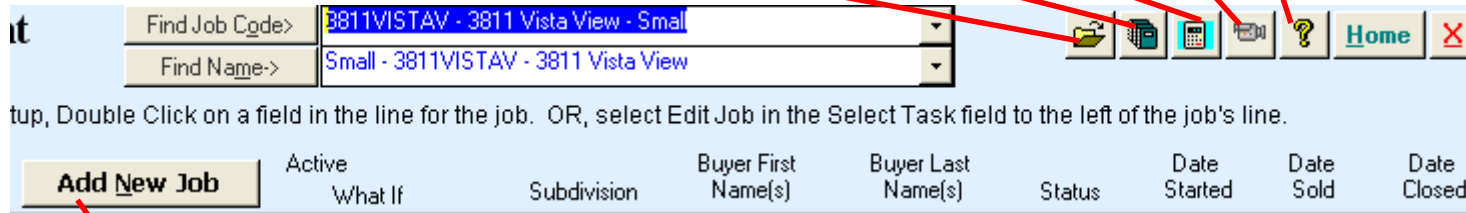
Fantastic Builder, Inc.

Record: 1 of 7

Tip! You can use the 'Navigation' buttons at the bottom of the window to move from record to record!

## Buttons on the Window / Save to Excel or Word

\*Send Data To Excel, Word, Documents etc. (explained below)    Pop Up Calculator    Tutorial Movie Info    Help Documents



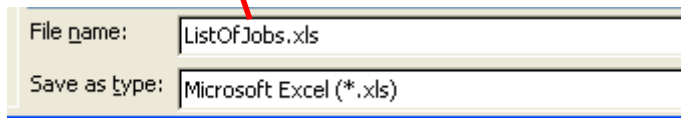
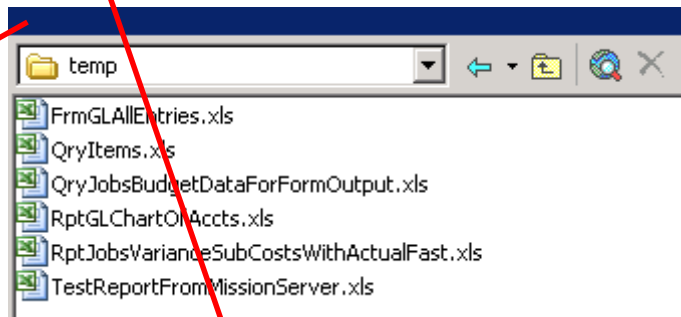
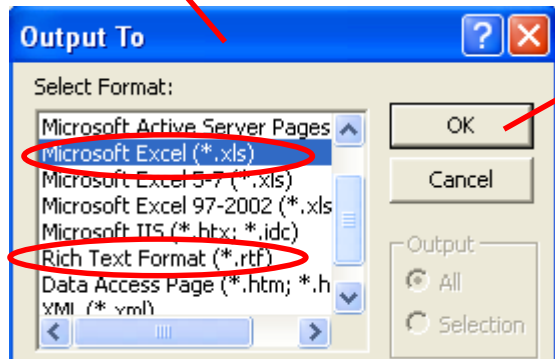
up, Double Click on a field in the line for the job. OR, select Edit Job in the Select Task field to the left of the job's line.

The 'Add New Job' button is explained in the Help document for setting up a job.

**\*Send Data to Excel, Word, etc.** - Use the button that looks like an open folder to save the data displayed on the window as an Excel or Word file. To save as an Excel file, select one of formats that end in .xls. To save as a Word file, use the Rich Text Format (\*.rtf).

After selecting a folder to save the file to, type in an appropriate name for the file. Then click the OK button.

The file will save to the selected folder and you can use it with the appropriate Excel or Word program.



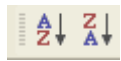
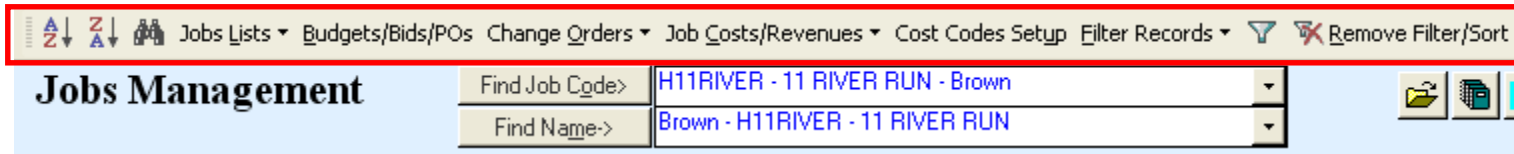
### NOTE TO REMOTE USERS:

IF you save a file to 'My Documents' on the Remote Server, you will not be able to open it until it is downloaded to your own computer. Please follow the instructions in the 'Remote User Guide' about downloading files from the server to your own computer.

IF you navigate to your own computer to save the file, then downloading as mentioned above will not be necessary. HOWEVER, it CAN be faster to quickly save to My Documents on the server and then download later. This will avoid waiting for the program to calculate AND download at the same time.

## Toolbar on Jobs Management Window

See Brief Toolbar Descriptions below. For **Quick Selection** of a button on a toolbar, try holding down the Alt key on your keyboard and pressing the underlined letter shown on the button. If there is a drop down of selections associated with the button, just press the underlined letter for your selection on your keyboard.



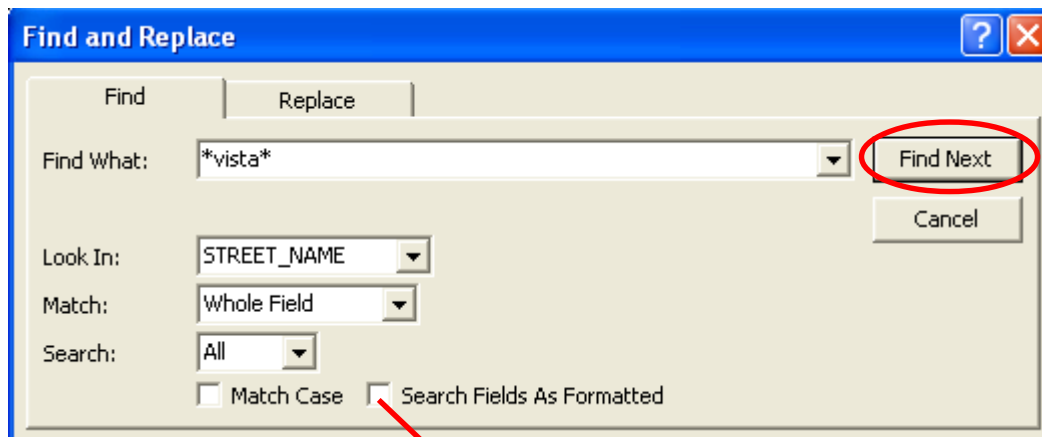
**A-Z Sort** - Sort records shown on the window in ascending order (A to Z, 1 to whatever, etc.). First decide which column should be used for the sort. Then click on anything in that column. Then use the sort button on the toolbar.

**Z-A Sort** - Sort records shown on the window in descending order (Z to A, whatever to 1, etc.). First decide which column should be used for the sort. Then click on anything in that column. Then use the sort button on the toolbar.



**Binoculars (Find)** - Use binoculars to find data within a column. First click in the column you want to search. Then click the binoculars. Type in what you are searching for. Then click the 'Find Next' button. If a match was found, it will be highlighted on the list of records. Click the Cancel button when you are finished searching.

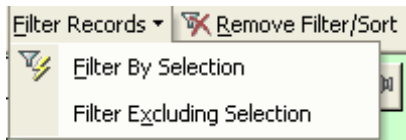
Example: Click on any street name in the jobs list. Then click the binoculars on the toolbar. To find records that have the word \*vista\* in the name, use asterisks on either side of the word.



Hint: It can help to uncheck the 'Search Fields as Formatted' box first.

Continue to next page for more toolbar information.

### Filtering Records



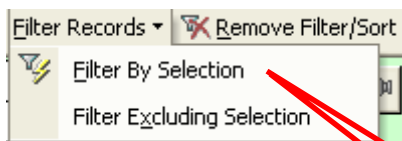
**Filter Records->Filter By Selection** - Use this button to filter and display only records with the same data that is in the field where the cursor is on the screen. The number of filtered records will be displayed on the bottom left of the screen with the word “Filtered” in parenthesis. To remove the filter and display all records, click the “**Remove Filter/Sort**” toggle button on the Toolbar.

**Filter Records->Filter Excluding Selection** - Use this button to filter and display only records that do NOT have same data that is in the field where the cursor is on the screen. The number of filtered records will be displayed on the bottom left of the screen with the word “Filtered” in parenthesis. To remove the filter and display all records, click the “**Remove Filter/Sort**” toggle button on the Toolbar.

EXAMPLE: Step 1 - To display only jobs in one subdivision, click on the subdivision in the column. We'll try 'The Dominion'.

Job Code	<a href="#">Add New Job</a>	Active	What If	Subdivision	Buyer First Name(s)	Buyer Last Name(s)	Status	Date Started	Date Sold	Date Closed
2900GIBSON	2900 Gibson St.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	The Dominion	John and Sue Black	SOLD	15-Jul-06	28-Jun-06	
3811VISTAV	3811 Vista View	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	Peaceful Valley	Jim and Barbara Smith	SOLD	15-Nov-06	26-Oct-06	
H11RIVER	11 RIVER RUN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	The Dominion	Jack and Jill Brown	SOLD	01-Dec-01	15-Nov-01	
PLAN 1000	0 Plan 1000 Template	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	CUSTOM	UNKNOWN		INVENTORY			

Step 2 - Click Filter Records, Then Filter by Selection



After clicking ‘**Filter By Selection**’, only the jobs in the subdivision ‘The Dominion’ are displayed. Notice bottom of window shows that there are 2 “filtered” records. To return all jobs to the window, use the ‘**Remove Filter/Sort**’ button.

This feature can be used on any data in any column. For example, you could click on SOLD in the Status column, and use **Filter By Selection** to only display Sold jobs. OR, use **Filter Excluding Selection** to display all jobs that do NOT have a sold status.

Job Code	<a href="#">Add New Job</a>	Active	What If	Subdivision	Buyer First Name(s)	Buyer Last Name(s)	Status	Date Started	Date Sold	Date Closed
2900GIBSON	2900 Gibson St.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	<b>The Dominion</b>	John and Sue Black	SOLD	15-Jul-06	28-Jun-06	
H11RIVER	11 RIVER RUN	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CUSTOM	The Dominion	Jack and Jill Brown	SOLD	01-Dec-01	15-Nov-01	

Record: 1 of 2 (Filtered)

Toolbar on the Jobs Management Window - continued

**Job Lists**



**Job Status Report** - Opens a window to update the status of jobs based on completed phases AND to print a Job Status Report.

**Job Summaries With Revenues and Costs** - Opens a window with selections for various reports of all jobs and their revenue and cost status.

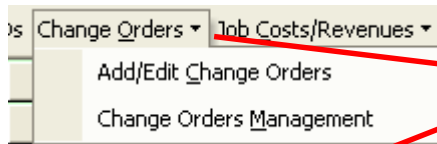
**Job Lists - Good for Excel Export** - Opens window to print job lists based on selected criteria, OR to send all job data to an Excel spreadsheet. Help documents are available on the window.

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

Job Code	Edit	Active	What If	Buyer	Str Num	Str Name	City	St.	Zip
▶ 3811VISTAV	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Small, George and Mar	3811	Vista View	Austin	TX	78704-
DemoJob	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	,	0				
H11RIVER	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Brown, Jack and Jill	11	RIVER RUN	City of the Hill	TX	
PLAN A	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Smith, Jim and Barbara	5800	Vista View	Austin	TX	78704-
TEMPLATE1	Edit	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	,	0	Template - Plan 1			
TEST1	Edit	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Black John and Sue	2000	Gibson St	Austin	TX	78704-

**Other buttons on Jobs Management toolbar**



Use other buttons on the Jobs Management toolbar to navigate to other features in the program. Help instructions for the windows that open will be available on those windows.

