

Jobs Phase Status Update and Reports - Opening the Window

Index-> **Status Report For Jobs**

The quickest way to open the window for updating the Phase Status of jobs and to produce Phase Status reports is to start typing 'Status' into the **Index** field on the Navigation/Home window until 'Status Report For Jobs' fills in. Then press the Enter key on your keyboard. Continue to the next page.

Find... | Add/Edit Status Categories | Filter Records ▾ | Remove Filter/Sort ▾

Update Phase Status of Jobs

Home X

[Go To Jobs Management](#)

			Start	Found Pour	Cover Inspection	Completed	Closed	Last Status Update	
ANNIE1234	1234 Annie Rd.	SOLD	02/08/07	02/23/07				04/02/07	Update Status
ANNIE2345	2345 Annie Rd.	INVENTORY	12/21/06	01/30/07				04/02/07	Update Status
ANNIE3456	3456 Annie Rd.	INVENTORY							Update Status
ASPEN666	666 Aspen Rd	INVENTORY							Update Status
BENDER4455	4455 Bender St.	INVENTORY							Update Status
BROADWAY22	222 Broadway	INVENTORY							Update Status
BROADWAY66	6666 Broadway	CLOSED					12/31/06		Update Status
BROWN456	456 Brown's Corner Rd.	INVENTORY							Update Status
CESAR324	324 Cesar Chavez	CLOSED							Update Status
CESAR4567	4567 Cesar Chavez	SOLD							Update Status
CESAR5678	5678 Cesar Chavez	WHAT IF							Update Status
COMFORT555	5555 Comfort Valley Rd.	CLOSED					12/31/06		Update Status
COOL888	888 Cool River Rd.	CLOSED	10/30/06				02/28/07	01/29/07	Update Status
EARTH7654	7654 Earth Run	SOLD	08/31/06						Update Status
ECHO221	221 Echo Rd.	INVENTORY							Update Status
EDGEWATER7	7890 Edgewater Rd.	SOLD	01/03/07	02/08/07				04/02/07	Update Status
EDGINGTON5	569 Edgington	CLOSED							Update Status
EDWARDS444	4444 Edwards Rd	SOLD							Update Status
HARPER889	889 Harper Valley	CLOSED	02/16/06	03/01/06	06/27/06	12/18/06	03/15/07	12/18/06	Update Status
HARPERS888	8888 Harpers Cove	SOLD	01/29/07	02/27/07				04/02/07	Update Status

Enter Monday Date for Status Report->
04/02/07
[Open Status Report](#)

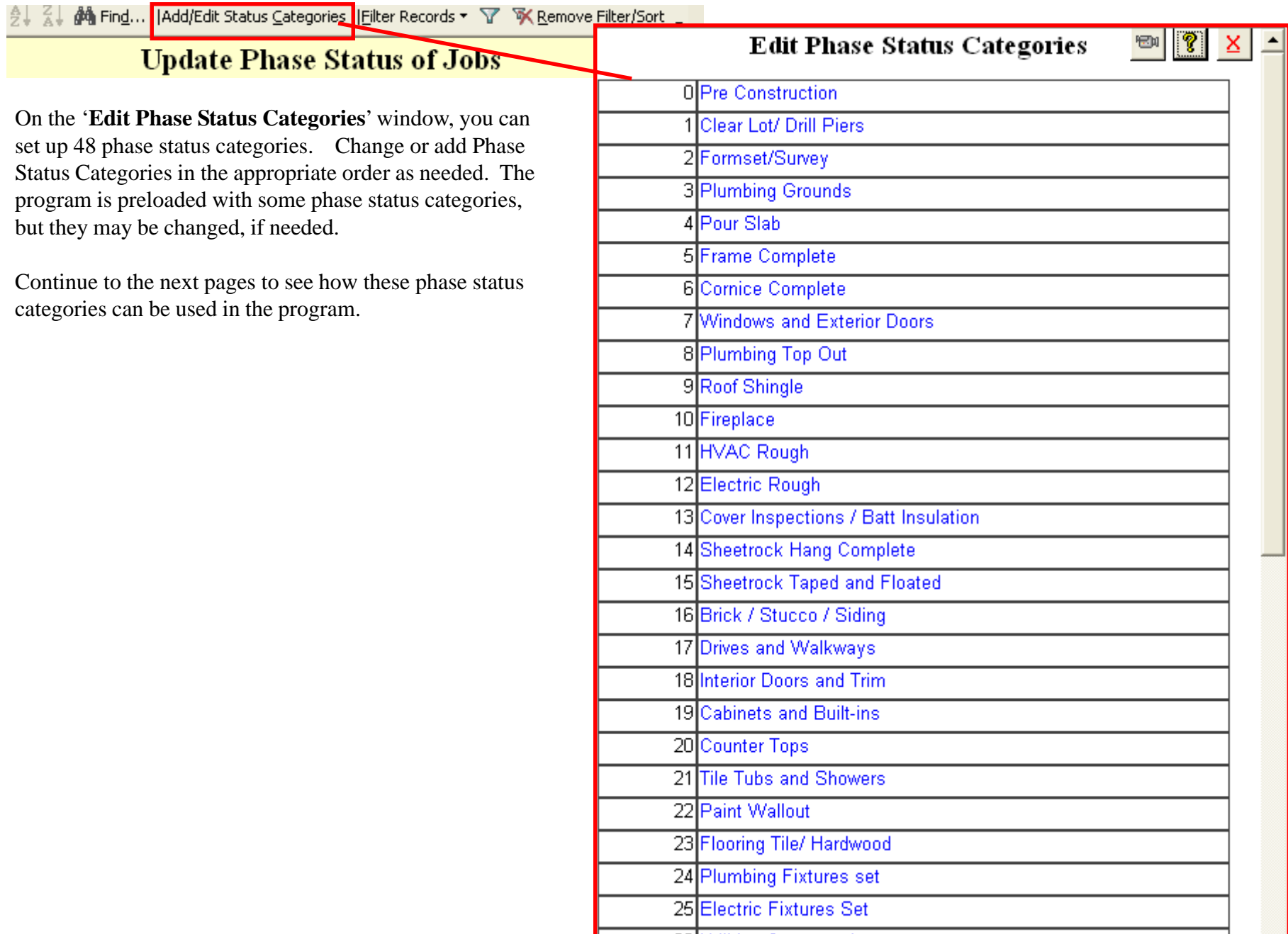
15-Jan-07	26-Feb-07	05-Feb-07	19-Mar-07
22-Jan-07	05-Mar-07	12-Feb-07	26-Mar-07
29-Jan-07	12-Mar-07	19-Feb-07	02-Apr-07

Report will only display jobs that have status activity during the 12 weeks prior to the date selected.

When report opens, use Page Setup on the toolbar to set the page view to Landscape.

Set Up Phase Status Categories

Before beginning any work on updating the Phase Status for jobs, first set up the Phase Status Categories that will fit your needs. To add or edit Phase Status Categories, use the button on the **toolbar** labeled 'Add/Edit Phase Status Categories' at the top of the window.



The screenshot shows a software window titled "Edit Phase Status Categories". The window has a toolbar at the top with several icons, including a red box around the "Add/Edit Status Categories" button. Below the toolbar is a yellow header bar with the text "Update Phase Status of Jobs". The main area of the window is a table with 25 rows, each representing a phase status category. The categories are numbered from 0 to 25 and listed in blue text. A red arrow points from the "Add/Edit Status Categories" button in the toolbar to the top of the table.

Category Number	Category Name
0	Pre Construction
1	Clear Lot/ Drill Piers
2	Formset/Survey
3	Plumbing Grounds
4	Pour Slab
5	Frame Complete
6	Cornice Complete
7	Windows and Exterior Doors
8	Plumbing Top Out
9	Roof Shingle
10	Fireplace
11	HVAC Rough
12	Electric Rough
13	Cover Inspections / Batt Insulation
14	Sheetrock Hang Complete
15	Sheetrock Taped and Floated
16	Brick / Stucco / Siding
17	Drives and Walkways
18	Interior Doors and Trim
19	Cabinets and Built-ins
20	Counter Tops
21	Tile Tubs and Showers
22	Paint Wallout
23	Flooring Tile/ Hardwood
24	Plumbing Fixtures set
25	Electric Fixtures Set

On the 'Edit Phase Status Categories' window, you can set up 48 phase status categories. Change or add Phase Status Categories in the appropriate order as needed. The program is preloaded with some phase status categories, but they may be changed, if needed.

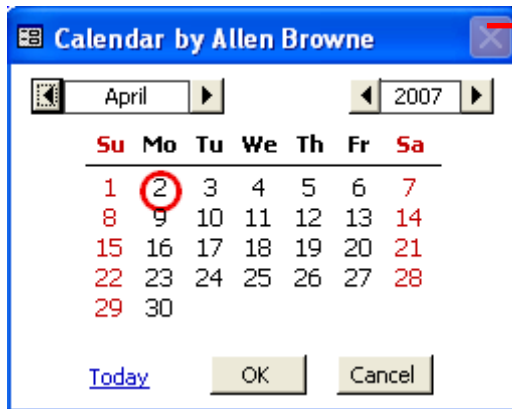
Continue to the next pages to see how these phase status categories can be used in the program.

Updating a Job's Phase Status

To update the Phase Status for a job, find the job in the list of jobs. Then use the button labeled 'Update Status'.

Update Phase Status of Jobs								
	Start	Found Pour	Cover Inspection	Completed	Closed	Last Status Update		
ANNIE1234	1234 Annie Rd.	SOLD	02/08/07	02/23/07				04/02/07 Update Status
ANNIE2345	2345 Annie Rd.	INVENTORY	12/21/06	01/30/07				04/02/07 Update Status
ANNIE3456	3456 Annie Rd.	INVENTORY						Update Status

On the 'Update Job Phase Status' window that opens, FIRST enter or select a Monday Date. It can be easiest to use the Calendar button to pop up a calendar to select a Monday date. Monday dates are used to keep the Job Status reports uniform by week.



Update Job Phase Status

ANNIE2345: 2345 Annie Rd. -

Start Date:	12/21/06	Found. Pour	01/30/07	Proj. To Close	_/_/_
Piers Pour Date	12/23/07	Cover Inspect		Completed Date	

Start Date is supplied from Job Setup window.

FIRST: Enter or select a Monday Date->

THEN: Click To Add New Status Line For The Date

Phase Status	
Monday, December 18, 2006	0 - Pre Construction
Monday, January 08, 2007	2 - Formset/Survey
Monday, January 22, 2007	3 - Plumbing Grounds
Monday, January 29, 2007	3 - Plumbing Grounds
Monday, February 05, 2007	4 - Pour Slab
Monday, February 12, 2007	4 - Pour Slab
Monday, February 19, 2007	4 - Pour Slab
Monday, February 26, 2007	4 - Pour Slab
Monday, March 05, 2007	4 - Pour Slab
Monday, March 12, 2007	5 - Frame Complete
Monday, March 19, 2007	5 - Frame Complete
Monday, March 26, 2007	6 - Cornice Complete
Monday, April 02, 2007	8 - Plumbing Top Out


WARNING! If the red X button to Delete Record is clicked, the line will automatically delete!

After entering a Monday date, use the button labeled 'THEN: Click to Add New Status Line For the Date'. On the new line that is added, use the drop down list of Phase Status Categories to select the appropriate phase the job is in as of the Monday date.

Continue to the next page for an example of the Phase Status Report.

Job Status Report

To open a report of the Phase Status for all jobs that have been updated with a phase status, use the 'Open Status Report' button on the window that lists all of the jobs.

Enter Monday Date for Status Report → 04/02/07  **Open Status Report**

15-Jan-07	26-Feb-07	05-Feb-07	19-Mar-07
22-Jan-07	05-Mar-07	12-Feb-07	26-Mar-07
29-Jan-07	12-Mar-07	19-Feb-07	02-Apr-07

Report will only display jobs that have status activity during the 12 weeks prior to the date selected.

When report opens, use Page Setup on the toolbar to set the page view to Landscape.

The end of the report will display a list of all phase numbers and their titles that is used as a 'key' to what the status numbers on the report mean. See the next page.

Amazing Builders, Inc.
Jobs Status Report
Monday, April 02, 2007

Monday, April 02, 2007

Project#	Address	Legal Description	Bank	Start Date	Foundation	Cover Insp.	Closed	Days In Prod. To Date	Days Start To Complete	Status By Week											
										1/15	1/29	2/12	2/26	3/12	3/26						
Project Mgr				Pier Pour	Pour	Proj to Close	Completed			1/22	2/5	2/19	3/5	3/19	4/2						
CLOSED																					
COOL888	888 Cool River Rd. -			10/30/2006			2/28/2007	154					34								
None																					
INVENTORY																					
ANNIE2345	2345 Annie Rd. -			12/21/2006	1/30/2007			102			3	3	4	4	4	4	5	5	6	8	
Jeff				12/23/2007																	
LOVELY789	789 Lovely Lane -		Whitney Bank	4/2/2007	4/2/2007										0	0				0	
Mike Hartigan																					
222	6789 DO NOT USE -			2/15/2007	2/20/2007			46						1	0	3	4			5	
Jeff				2/16/2007																	
SOLD																					
ANNIE1234	1234 Annie Rd. -			2/8/2007	2/23/2007			53					1	2	3		4			5	6
Jeff							10/30/2007														
EDGEWATER7	7890 Edgewater Rd. -			1/8/2007	2/8/2007			89			1		2	4	4		4			5	6
None				1/8/2007			9/11/2007														
HARPERS888	8888 Harpers Cove -			1/29/2007	2/27/2007			63				0	2	3	3		4				5
Jeff				2/1/2007			9/18/2007														
MASON1425	1425 Mason Sts. -			7/21/2006	8/11/2006		11/9/2006	255			20		22	23	26		31				31

Attaching Phase Levels to Cost Codes

As described in the Help Document about setting up Cost Codes, 'Phase Levels' can be attached to Cost Codes.

Use the drop down button to select from your list of Phase Status Categories. The '+' button to the right of the field will open the window shown previously in this document to 'Edit Phase Status Categories'.

Continue to the next page for information on printing a job budget based on the associated phases.

Cost Codes and Master Pricing Setup

Find Main Heading-> **PLUMBING-3600**

Find Sub Code Num-> **3605 - Plumbing - Turnkey**

Find Sub Code Name-> **Plumbing - Turnkey - 3605**

To edit a Cost Code or its general check list of materials and labor, double click on a cost code.

Load NAHB Cost Codes

This is NOT a Budget! This is a MASTER. Help Documents by using the Question Mark watch movie tutorial by using the movie car

Select Task	Main and Sub Cost Codes	ADD/EDIT MAIN HEADINGS Add New Sub Cost Code	Default Measure	Default Qty	Default Qty %	Default Unit Price	Default Markup %	Cost Type	Phase Level	
Select Task	3490	Concrete - extras		+	1	100.00%	\$0.00	0.00%	MATERIALS	0
Select Task	3500	SHEET METAL - ROUGH	Total	+	0	0.00%	\$0.00	0.00%		0
Select Task	3510	Gutters And Downspouts		+	1	100.00%	\$0.00	0.00%	TURNKEY	0
Select Task	3520	Mtl Roof Edgnsgs/Flshng		+	1	100.00%	\$0.00	0.00%	MATERIALS	0
Select Task	3530	Soffits/Gables Flashng		+	1	100.00%	\$0.00	0.00%	MATERIALS	0
Select Task	3590	Sheet Metal, Rough-Extras		+	1	100.00%	\$0.00	0.00%	TURNKEY	0
Select Task	3600	PLUMBING	Total	+	0	0.00%	\$0.00	0.00%		0
Select Task	3605	Plumbing - Turnkey		+	1	100.00%	\$0.00	0.00%	TURNKEY	8
Select Task	3610	Rough Plumbing	Living SF	+	0	33.00%	\$4.60	0.00%	TURNKEY	3
Select Task	3620	Topout Plumbing	Living SF	+	0	33.00%	\$4.60	0.00%	TURNKEY	8
Select Task	3630	Final Plumbing	Living SF	+	0	34.00%	\$4.60	0.00%	TURNKEY	24
Select Task	3631	Plumbing Fixtures	Allowance	+	1	100.00%	\$3,500.00	0.00%	MATERIALS	24
Select Task	3635	Softener/Filters	Each	+	0	100.00%	\$75.00	0.00%	MATERIALS	24
Select Task	3640	Water Heater		+	1	100.00%	\$0.00	0.00%	MATERIALS	24
Select Task	3650	Bathtubs and Showers		+	1	100.00%	\$0.00	0.00%	MATERIALS	24
Select Task	3655	Fiberglass Shower Pans		+	1	100.00%	\$0.00	0.00%	TURNKEY	24
Select Task	3680	Plumbing Supplies		+	1	100.00%	\$0.00	0.00%	MATERIALS	24
Select Task	3685	Plumbing Repairs		+	1	100.00%	\$0.00	0.00%	LABOR	24
Select Task	3690	Plumbing Extras		+	1	100.00%	\$0.00	0.00%	MATERIALS	24
Select Task	3700	ELECTRICAL	Total	+	0	0.00%	\$0.00	0.00%		0
Select Task	3705	Electrical-Turnkey		+	1	100.00%	\$0.00	0.00%	TURNKEY	25
Select Task	3710	Rough Electrical	Living SF	+	0	60.00%	\$1.95	0.00%	TURNKEY	12
Select Task	3720	Final Electrical	Living SF	+	0	40.00%	\$1.95	0.00%	TURNKEY	25
Select Task	3790	Electrical Extras		+	1	100.00%	\$0.00	0.00%	TURNKEY	25

Budget Phase Totals

Task Menu

- [View CHS Setup Steps](#)
- [Job Budget, Bids, Costs \(JB\)](#)
- [Job Status, Scheduling \(JS\)](#)
- [Purchase Orders \(PO\)](#)

IF you have attached Phase Categories to Cost Codes as described on the previous pages, there is a window and a report that will display job budget totals for each phase of a job. Use the button labeled '**Job Status/Scheduling**' under '**Task Menus**' on the Navigation/Home window. On the window that opens, first select a job. Then click on the words '**20-Budgeted Phase Totals For Selected Job**'. Continue to the next page for an example of the window that will open.

Job Cost Management Menu

Select Job (Try F4 key) Home X

[Go To Jobs Management](#)

CLICK on selections below, or enter a selection #:

[Go To Cost Codes Setup](#)

Budget/Estimating and Bids	Job Cost and Variance Reports
01-Job Budget/Bids Worksheet	13-Actual Job Costs-To-Date Reports
02-Estimated Costs at Completion / Estimated Profit / Profit Transfers / Contract Balance Report	14-Job Cost Variance Reports
03-Print Form to Track Plans and Bids	15-Summary Reports for All (or several) Jobs
04-Specs Plan Sheet	16-Subdivision Variance
	16.1-Subdivision Summary

Subdivision:

Change Orders / Draw Requests	Compare Costs Between Jobs
05-Go To Change Orders Menu	17-Compare Costs/Budgets Between 5 Jobs by Column
06 - Go To Draw Requests Menu	18-Compare Costs Between Multiple Jobs By Rows

Purchase/Work Orders and Vendor Costs	Jobs Phase Status and Scheduling Features
07-Purchase Orders for Selected Job (Add/Edit)	19-Update Jobs Phase Status / Status Report
08-PO/WO's and Actual Costs MANAGEMENT	20-Budgeted Phase Totals For Selected Job
08.1-Set up Default PO/WO Text by Cost Code	Scheduling features below are not related to Status features above.
09-Report: PO/WO's Compared to Budget	21-Detailed Scheduling Worksheet

Allowance
Costs
Detail?



Budget Phase Totals - continued

Jobs Phase Status and Scheduling Feat

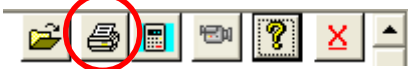
19-Update Jobs Phase Status / Status Report

20-Budgeted Phase Totals For Selected Jo

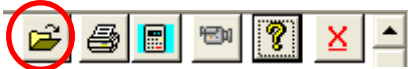
This window shown below will gather data from the selected job's budget and display the budget totals for each phase. This is based on the Phase Categories that are attached to Cost Codes!

On the 'Budgeted Phase Totals' window that pops up, you can scroll through the information by using the horizontal slide bar.

PRINT a report by using the printer icon on the window.



Send the data to an Excel spreadsheet, if desired, by using the folder button.



Budgeted Phase Totals				
2345 Annie Rd. -				
Wednesday, April 04, 2007				
		Budget Total	Marked Up	Marked Up w/Tax
0	Pre Construction	\$1,001,758.75	\$1,101,934.63	\$1,101,934.63
1	Clear Lot/ Drill Piers	\$5,300.00	\$5,830.00	\$5,830.00
2	Formset/Survey	\$1,781.00	\$1,959.10	\$1,959.10
3	Plumbing Grounds	\$9,421.50	\$10,363.65	\$10,363.65
4	Pour Slab	\$50,678.00	\$55,745.80	\$55,745.80
5	Frame Complete	\$89,599.57	\$98,559.53	\$98,559.53
6	Cornice Complete	\$750.00	\$825.00	\$825.00
7	Windows and Exterior Doors	\$52,100.00	\$57,310.00	\$57,310.00
8	Plumbing Top Out	\$9,421.50	\$10,363.65	\$10,363.65
9	Roof Shingle	\$50,388.60	\$55,427.46	\$55,427.46
10	Fireplace	\$8,200.00	\$9,020.00	\$9,020.00
11	HVAC Rough	\$10,278.00	\$11,305.80	\$11,305.80
12	Electric Rough	\$17,130.00	\$18,843.00	\$18,843.00
13	Cover Inspections / Batt Insulation	\$3,140.50	\$3,454.55	\$3,454.55
15	Sheetrock Taped and Floated	\$22,936.50	\$25,230.15	\$25,230.15
16	Brick / Stucco / Siding	\$53,100.00	\$58,410.00	\$58,410.00
17	Drives and Walkways	\$8,000.00	\$8,800.00	\$8,800.00
18	Interior Doors and Trim	\$98,000.00	\$107,800.00	\$107,800.00
19	Cabinets and Built-ins	\$0.00	\$0.00	\$0.00
20	Counter Tops	\$19,500.00	\$21,450.00	\$21,450.00
21	Tile Tubs and Showers	\$26,551.00	\$29,206.10	\$29,206.10
22	Paint Wallout	\$32,832.50	\$36,115.75	\$36,115.75
23	Flooring Tile/ Hardwood	\$36,500.00	\$40,150.00	\$40,150.00
24	Plumbing Fixtures set	\$27,421.50	\$30,163.65	\$30,163.65
25	Electric Fixtures Set	\$21,136.00	\$23,249.60	\$23,249.60
27	Finish Hardware	\$6,500.00	\$7,150.00	\$7,150.00
28	Mirrors and Shower Doors	\$4,500.00	\$4,950.00	\$4,950.00
TOTALS		\$1,734,196.92	\$1,907,616.62	\$1,907,616.62

Record: 1 of 31

Print Purchase/Work Orders Based on Completed Phases

As explained in the Help Document about creating Purchase/Work Orders, PO/WO's can be printed based on the latest phase status for a job. This will work IF Phase Status Categories have been attached to Cost Codes as described earlier in this Help Document.

From the Add OR Edit Purchase/Work Orders window, use the button labeled '**Open Window to Print PO/WO's Based on Completed Phases**'. A window will open that lists all PO/WO's that are connected to the latest phase (plus one) or previous phases that have not been marked as printed. Use the check boxes or features on the window to select PO/WO's to print. Then **Select Text** as described in the PO/WO Help Document, and click on the button labeled '**Print Selected PO/WO's**' to print the batch of PO/WO's.

<-Remove Main PO/WO Number From Top of PO/WO Printout

Print POWO For Selected POWO	Print PO/WO's In Batches
Email POWO For Selected POWO	Print POs Based On Completed Phases

PO/WO's to Print Based On Latest Phase Status (Not printed)



JOB	ANNIE2345	ANNIE2345: 2345 Annie Rd.-
Latest Job Phase	8	PO/WO's to select from are limited to ones with phases less than or equal to latest phase (plus one) AND ones that have not been marked as printed.

Phases Are Based on Phases Associated With the PO/WO Cost Codes.

	Phase	Main PO/WO Number	VENDOR	VENDOR TYPE
<input checked="" type="checkbox"/>	0	3734Piping-AMERICAN-01	AMERICAN-American Rent-A-Fence	SUB-CONTRACTOR
<input checked="" type="checkbox"/>	0	3734Piping-HOUSTON-01	HOUSTON-City of Houston	AGENT
<input checked="" type="checkbox"/>	1	3734Piping -PO001	JTB-JTB Services, Inc	SUB-CONTRACTOR
<input checked="" type="checkbox"/>	1	3734Piping-JTB-83	JTB-JTB Services, Inc	SUB-CONTRACTOR
<input checked="" type="checkbox"/>	4	3734Piping-FOUNDATI-01	FOUNDATI-Foundation Builders, LLC	SUB-CONTRACTOR

[Unselect All](#) [Add/Edit Main Body Titles and Text](#) Remove Main PO/WO Number From Top of PO/WO Printout

[Select All](#) Select Text-> **PO - Purchase Order** [Print Selected PO/WO's](#)

Phases are attached to Cost Codes on the Cost Code setup window.

Phases are attached to Jobs using the window to Update Jobs Phase Status.

IMPORTANT! If you will be printing PO/WO's based on Phases, you should be careful that PO/WO's do NOT include PO/WO Lines with Cost Codes from different phases!