

Job Templates

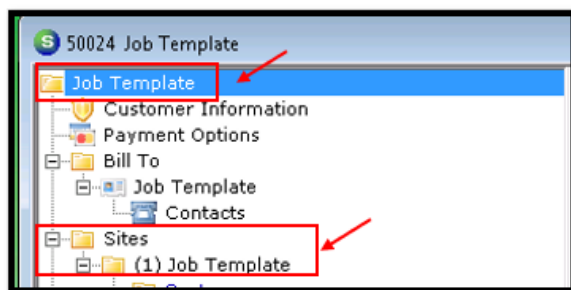
02/12/2024 10:55 am EST

Templates allow you to set defaults for Job Tasks, Install Charges, Parts, and Recurring Services.

A Job Template may be created for one or any combination of these four elements.

Before Creating a Job Template

Creating Customer/Site: The first thing that you will need to do prior to creating your first Job Template, is to set up a new Customer/Site to which the templates will be attached; you may name this customer "Template" for ease of searching later on.



Creating Job Type: You should also set up a new Job Type labeled "Template".

You must set up at least one Job Task on this Job Type; you do not need to set up any other information on the Job Type other than this one item. Alternatively, you may use one of your existing Job Types.

Sedona Office Setup (Sedona Security)

File Find Find Next View Tools Help

Sedona Setup

Description	Area
UL Grade	CS
Branches	GL
Categories	GL
Chart of Accounts	GL
Create Accounting Periods	GL
Define GL Segments and Length	GL
Open Current Accounting Period	GL
Custom Fields Setup(Part)	IN
Custom Fields Table1(Part)	IN
Custom Fields Table2(Part)	IN
Custom Fields Table3(Part)	IN
Customer Part Groups	IN
Inventory Setup	IN
Manufacturer	IN
Material Handlers	IN
Part Labor Unit Desc	IN
Product Line	IN
Warehouses	IN
Commission Types	JM
Contract Forms	JM
Custom Fields Setup (Job)	JM
Custom Fields Table1 (Job)	JM
Custom Fields Table2 (Job)	JM
Custom Fields Table3 (Job)	JM
Custom Fields Table4 (Job)	JM
Install Companies	JM
Installers	JM
Job Approval Group	JM
Job Expense Types	JM
Job Phases	JM
Job Statuses	JM
Job Tasks	JM
Job Types	JM
Labor Tasks	JM
Prevailing Wages	JM
Setup Processing	JM

Job Types

Job Type	Description	Category	Pctg Billing	Inact...
WFH	WFH	Admin G & A	N	N
Testing	Testing	Admin G & A	N	N
TEST System_Copy	TEST System	Installation ...	N	N
TEST System	TEST System	Installation ...	N	N
Test - Fire	Test - Fire	Jobs Res	N	N
Template - Part Qty 0	Template - Part Qty 0	Installation	N	N
Template	Lock Key Package 1	Equip Sales	N	N
SedonaTest44	SedonaTest44	Jobs Res	N	N
Parts&Smarts-Holdback	Parts & Smarts	Jobs P&S	N	N
Parts&Smarts-Accrued Inc	Parts&Smarts-Accrued Income	Jobs P&S	N	N
No Phase-2	No Phase-2	Jobs Com	N	N
No Phase	No Phase	Jobs Com	N	N

☐ Include Inactive

Job Type Setup ☐ Inactive

Job Type: **Template - Part Qty 0** Description: **Template - Part Qty 0**

Detail | Job Tasks | Costing | Items | Accounts | Commission Types | Phases |

Category	Installation	Hold Back %	0.00
Material WIP	122100	Hold Back Item	
COGS Acct	510001	Hold Back Acct	
Use COGS Acct	510001	Est LU Cost	0
When Amt >=	0	☐ Zero Part Price	
Misc WIP		Material Item	
Accrued Income		☐ Percentage Invoicing	☐ Expense Part When Issued
☐ Lease	☐ Allow Override Task List	☐ Allow Costing to Closed Jobs	☒ Force Part Reconciliation

Apply New Copy Delete

Creating a Job Template

Using the Customer/Site "Template" in the previous step, Create a new Job.

The Job Work Order form will be displayed. Select the Job Type of Template (as mentioned above), select an Install Company, Salesperson, and a Sold Date. Click the Apply button when finished.

Job - 5137-1 (Job Template)

Job

Customer 50024

Site

Job Number 5137-1

Job Type ACC-Res

Job Status Parts

System 50024 Access

Labor Units 2. (0. Used)

Job Template

1234 Evergreen Lane

Daphne, AL 36526

Job System

Bill To

Tasks

Installs \$783.30

Recurring \$0.00

Materials \$0.00

Job Costing

Work Order

Work Order Entry

Job Information

Job Number 5137-1

Job Type Template – Part Qty 0

Description Job Template - Test 1

Tax Group NC - State Tax

Branch MI

HoldBack % 0

Install Company MI

Installer

☐ Permits Required

Permit 1

Permit 2

Permit 3

Created 11/30/2023

Prevailing Wage 0.00

Project Manager

Salesperson Amy Bartimus

P.O. Number 0

Sold Date 11/30/2023

Projected Start

Projected End

Notes

Change Customer

Change Site

Sales Reversal

Apply

Create Template

After saving the Work Order form, the Job System form will be displayed. Select the System Type for the Template from the drop-down list, then click on the Apply button.

Job - 4034 (Job Template)

Job	Customer 50024	Site
Job Number 4034	Job Template	Job Template
Job Type Template - Part Qty 0	1234 Evergreen Lane	1234 Evergreen Lane
Job Status Activation	Daphne, AL 36526	Daphne, AL 36526
System 50024 CCTV		
Labor Units 0. (0. Used)		

System

System and Service Information

☒ New System

System Account 50024

System Type CCTV

Panel Type

Location

Monitored By

Memo

Warranty 90-P 30-L

Service Level T&M

Serviced By ABC Service Provider

Comments

Contract Information

Contract Form

Contract Number 50024

Contract Months 0

Renewal Months 0

Cycle Purchase Order

Cycle P.O.

Inspections

Frequency ByRequestOnly

Service Problem Code

Service Level T&M

Next Inspection

Notes:

Apply

Next, navigate to the Job Tasks form; set up the appropriate Tasks for the Job Template being created. Click the Apply button when finished.

Job - 4034 (Job Template)

Job		Customer 50024	Site
Job Number	4034	Job Template	Job Template
Job Type	Template - Part Qty 0	1234 Evergreen Lane	1234 Evergreen Lane
Job Status	Activation	Daphne, AL 36526	Daphne, AL 36526
System	50024 CCTV		
Labor Units	0. (0. Used)		

#	Phase	Task	Job Status	Invoice	Approved	Approve...	Comments	Schedule	Last Tech	Last Dispatch	Labor Hours
1	Phase 01	Activate	Activation	N	N						1

*The job will be locked and the status will be set to Job Complete when all tasks in the job are approved.

Job Task: Job Status: Phase Code: Labor Hours: Schedule Date: ☐ Invoice

Next, you will set up one, two or all three elements of the Job Template: Install Charges, Recurring Charges, and Materials List.

Saving a Job Template

When finished with the above steps, return to the Work Order form. At the lower right of the form, click on the **Create Template** button.

Job - 5137-1 (Job Template)

Job	Customer 50024	Site
Job Number 5137-1	Job Template	Job Template
Job Type ACC-Res	1234 Evergreen Lane	1234 Evergreen Lane
Job Status Parts	Daphne, AL 36526	Daphne, AL 36526
System 50024 Access		
Labor Units 2. (0. Used)		

Work Order Entry

☐ Locked

Job Information

Job Number 5137-1

Job Type **Template – Part Qty 0**

Description Job Template - Test 1

Tag Group NC - State Tax

Branch MI

HoldBack % 0

Install Company MI

Installer

Created 11/30/2023

Prevailing Wage 0.00

Project Manager

Salesperson Amy Bartimus

P.O. Number 0

Sold Date 11/30/2023

Projected Start

Projected End

☐ Permits Required

Permit 1

Permit 2

Permit 3

Notes

Change Customer Change Site Sales Reversal Apply

Create Template

The Job Template form will be displayed to enter a name for the **Template** and enter a **Comment** related to the Job Template. When finished filling out the form, click the Save button.

Job Template

Template Part Qty 0

Comment Testing - Part Qty 0

Remove Save Close

Using a Job Template

When creating a new Job, you have the option of applying one, many or all of the elements of a Job Template to the Job. At the bottom of the Job Task, Install Charge, Recurring Charges, and Materials List is a button labeled Apply Template; clicking this button will open the search form from which to select the desired Job Template.

Job Tasks Template

When creating a new Job, the Job Type is selected on the Job Work Order form; the Job Type contains many defaults that will attach to the Job, including the Job Task List.

If you want to use the Job Tasks from a Job Template, simply click the Apply Template button on the Job Task form and select the desired Template. When doing this, the default Job Tasks from the Job Type will be removed, and the Job Tasks from the Template will auto-fill into the form. You can save the new Job Task List as-is or remove, modify, or add Job Tasks depending on the path of the Job being created.

Click the Apply button to save the Job Task List.

The screenshot displays the 'Job - 4034 (Job Template)' form. The 'Job' section at the top shows details for Job Number 4034, Job Type 'Template - Part Qty 0', Job Status 'Activation', System '50024 CCTV', and Labor Units '0. (0. Used)'. The 'Customer' is 50024 and the 'Site' is 1234 Evergreen Lane, Daphne, AL 36526. The 'Tasks' section contains a table with one task: Phase 01, Task 'Activate', Job Status 'Activation', Invoice 'N', Approved 'N', and Labor Hours '1'. An 'Apply Job Template' dialog box is open, showing a list of templates: '123 Template', 'AS Test Template', 'Fire - Smoke Com', 'Fire - Sprinkler Com', 'Part Qty 0', 'test 10-23-22', 'Test Job Template', and 'WeSuite Template'. The '123 Template' is selected. The 'OK' button is highlighted. At the bottom of the main form, the 'Apply Template' button is highlighted, and an arrow points to the 'Apply' button in the bottom right corner.

#	Phase	Task	Job Status	Invoice	Approved	Approve...	Comments	Schedule	Last Tech	Last Dispatch	Labor Hours
1	Phase 01	Activate	Activation	N	N						1

*The job will be locked and the status will be set to Job Complete when all tasks in the job are approved.

Job Task: Activate
Job Status: Activation
Phase Code: Phase 01
Labor Hours: 1
Schedule Date:

Sequence Locks Job: ☐

Save New Remove

Apply Template Apply

Install Charges Template

If you want to use the Install Charges from a Job Template, click the Apply Template button at the lower left of the form and select the desired Template from the drop-down list.

When doing this, the Invoice Items from the Template will auto-fill into the form. You can save the Invoice Items as-is, remove, modify, or add additional Invoice Items depending on the contract with your customer.

Click the Apply button to save the Install Charges.

Job - 4034 (Job Template)

Job		Customer 50024	Site
Job Number	4034	Job Template	Job Template
Job Type	Template - Part Qty 0	1234 Evergreen Lane	1234 Evergreen Lane
Job Status	Activation	Daphne, AL 36526	Daphne, AL 36526
System	50024 CCTV		
Labor Units	0. (0. Used)		

Installs

Item	Description	Phase	QTY	Unit Price	Extended Price	Tax	Exempt	Units	Cost Type	Cost
Apply Job Template Select Template 123 Template 123 Template AS Test Template Fire - Smoke Com Fire - Sprinkler Com Part Qty 0 test 10-23-22 Test Job Template WeSuite Template OK Cancel										

Total Install Labor Units: 0

Installation Totals: 0.00 0.00

Item: [Dropdown] Qty: [Input] Unit Price: [Input] Tax Exempt: ☐

Description: [Input] Labor Units: [Input]

Phase Code: [Dropdown]

Cost Type: [Dropdown]

Cost: [Input]

Save **New** **Delete**

Apply Template **Apply**

Recurring Charges Template

If you want to use the Recurring Charges from a Job Template, click the Apply Template button at the lower left of the form and select the desired Template from the drop-down list.

When doing this, the Recurring Invoice Items from the Template will auto-fill into the form. You can save the Recurring Invoice Items as-is, remove, modify, or add additional Invoice Items depending on the contract with your customer.

Click the *Apply* button to save the Recurring Charges.

Job - 4034 (Job Template)

Job	Customer	Site
Job Number 4034 Job Type Template - Part Qty 0 Job Status Activation System 50024 CCTV Labor Units 0. (0. Used)	Customer 50024 Job Template 1234 Evergreen Lane Daphne, AL 36526	Site Job Template 1234 Evergreen Lane Daphne, AL 36526

Recurrings

Item Code	Description	Sub Item Of	Bill Cycle	Cycle Start	RMR Amount	Cycle Amt	Tax	Exempt	Master	Active
Apply Job Template Select Template 123 Template 123 Template A5 Test Template Fire - Smoke Com Fire - Sprinkler Com Part Qty 0 test 10-23-22 Test Job Template WeSuite Template OK Cancel										

Total Monthly Amount 0.00 0.00

Recurring Item Description Sub Item Of Bill Cycle Cycle Start RMR Amount Cycle Amount Tax Exempt Enter as Monthly Amt Only

Apply Template Apply

Materials List Template

If you want to use the list of Materials from a Job Template, click the Apply Template button at the lower left of the form and select the desired Template from the drop-down list.

When doing this, the Part Numbers, quantities, sales price (if billing for individual parts) and phase from the Template will auto-fill into the form. You can save the Parts List as-is, remove, modify, or add additional Parts depending on the contract with your customer.

Click the Apply button to save the Materials List.

Job - 4034 (Job Template)

Job

Customer 50024

Site

Job Number 4034

Job Type Template - Part Qty 0

Job Status Activation

System 50024 CCTV

Labor Units 0, (0 Used)

Job Template

1234 Evergreen Lane

Daphne, AL 36526

Job Template

1234 Evergreen Lane

Daphne, AL 36526

Materials

Show Phases

Warehouse Main-MI

Part	Description	Vendor	Qty	On Hand	Location	Local Zone	Unit Price	Ext Price	Tax	Exempt	LU	Issued	Stock	PO Cost	PO Description
AX1005	SURFACE MOUN	Grayba	0	40			250.00	0.00	0.00	☐	0	0	☐	0.0000	
BV300	BV300 MOTION I	ATL	0	309			75.00	0.00	0.00	☐	0	0	☒	0.0000	

Apply Job Template

Select Template

123 Template

123 Template

AS Test Template

Fire - Smoke Com

Fire - Sprinkler Com

Part Qty 0

test 10-23-22

Test Job Template

WeSuite Template

OK

Cancel

Total Material LU

0

Sub Total

0.00

0.00

Capture Original Parts

Apply Template

Copy

Documents

Apply