

How To Update Job Task Defaults

12/11/2024 9:33 am EST

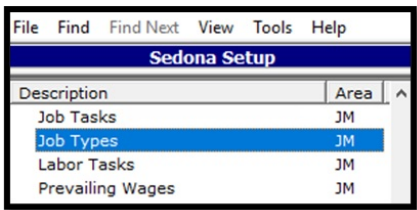
Issue:

User would like to update the defaulted information showing up in the Job's tasks.

Resolution:

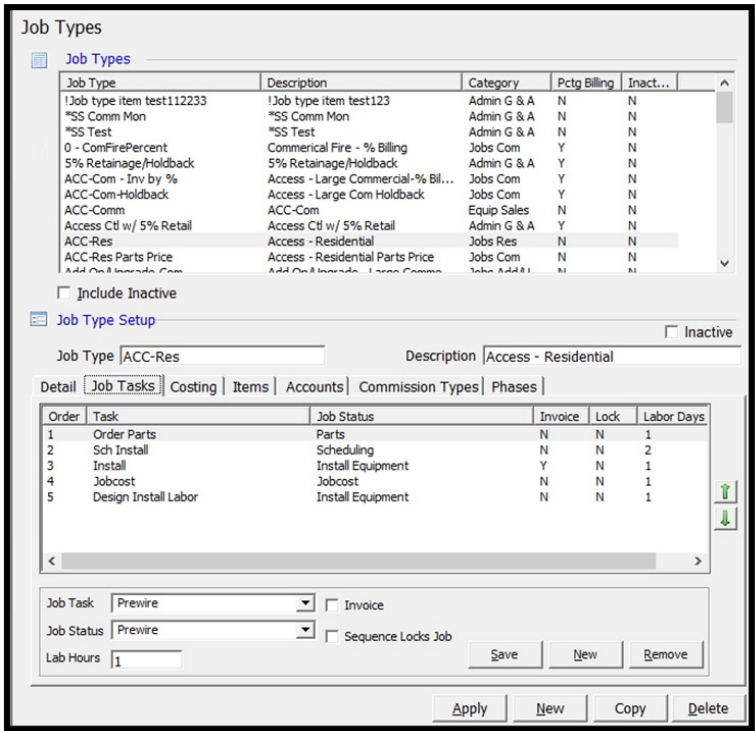
To update the Job Tasks defaults, go to:

SedonaSetup > Job Types in the JM area



Locate the Job Type being used and select it from the Job Types list

Select the Job Tasks tab



Select the Task that needs to be updated

Job Type Setup ☐ Inactive

Job Type Description

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

Order	Task	Job Status	Invoice	Lock	Labor Days
1	Order Parts	Parts	N	N	1
2	Sch Install	Scheduling	N	N	2
3	Install	Install Equipment	Y	N	1
4	Jobcost	Jobcost	N	N	1
5	Design Install Labor	Install Equipment	N	N	1

Job Task ☒ Invoice

Job Status ☐ Sequence Locks Job

Lab Hours

If the Job Task needs to be updated, select the task from the list then open the dropdown menu next to the Job Task field to find a new task

Job Task ☒ Invoice

Job Status

Lab Hours

Job Task	Description
Activate RMR	Activate RMR
Change Order	Change Order #1
Change Order	Change Order #2
Close Out	Close Out
Design Install	Design Install Labor
Final Billing	Final Billing
Initial Review	Initial Review
Install	Installation

If the Job Status related to the Job Task needs to be updated, select the task from the list then open the dropdown menu next to the Job Status field and find a new status

Job Task ☒ Invoice

Job Status ☐ Sequence Locks Job

Lab Hours

Job Status	Description
Activation	Activation
Change Order	Change Order
Close Out	Close Out
CO Approval	Change Order Approval
In-Progress	In-Progress
Install	Install Equipment
Jobcost	Jobcost Review
Joy	Joy

If a task needs to be updated to include Invoice, select the task from the list and mark the box labeled Invoice to indicate that an invoice needs to be created when the task is approved

Order	Task	Job Status
1	Order Parts	Parts
2	Sch Install	Scheduling
3	Install	Install Equipment
4	Jobcost	Jobcost
5	Design Install Labor	Install Equipment

Job Task

Jobcost

Invoice

Job Status

Jobcost

Sequence Locks Job

Lab Hours

1

If the default order of the Job Tasks needs to be updated, then select the Task from the list and then use the Green Up and Down arrows to move the task to a new order position

Order	Task	Job Status	Invoice	Lock	Labor Days
1	Order Parts	Parts	N	N	1
2	Sch Install	Scheduling	N	N	2
3	Install	Install Equipment	Y	N	1
4	Jobcost	Jobcost	N	N	1
5	Design Install Labor	Install Equipment	N	N	1

Green Up Arrow

Green Down Arrow