

Creating a Job

Category: Jobs | Created: March 18, 2026 | Updated: September 01, 2026

Jobs

Screen Location: Main Menu > Operations > Jobs

1. Double Click on the menu item Jobs to open the Job start screen. The Job start screen displays the last 500 records entered.
2. Sort the start screen by clicking on the column headings.
3. Filter the start screen by entering a value in the field above the column headings.
4. Open an existing Job by clicking the Open File Folder to the left of the record.
5. Begin a new Job by clicking the New button.
6. Exit the job start screen by clicking the Done button.

Note -- If the job was created from a [Bid](#), much of this information will already be populated with Bid values. However, any field can be overridden.

Entering a new Job:

Job Information Center

Customer Always On Time Construction 
 62 East Hwy 503
 Yacolt WA 98601

Contact/Ph Allen Albright  (222) 222-2222

Bill To Always On Time Construction 
 62 East Hwy 503
 Yacolt WA 98601

Tax Code Local **Pct** 7.5% **Estimator** Jill **Terms** Net 30

Project Name O Street Overpass 
Location O Street Overpass 
 O Street & Padden Parkway
 Vancouver WA

Job No. 1001
Start Date 2/2/2015
Status Active
Wage Type Private
County Clark

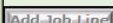
PO Number
Comment


Job Phases

Job Phase	Start Date	End Date
Job Phase 1	2/2/2015	3/4/2015

Details **Prevailing Wage** **Log Notes** **Custom Fields** **Progress**

SEQ	DESCRIPTION	F/T	LOCATION	RATE	U/M	COST	PC
1	Dirty Dirt	TO	Dirt & Concrete De	\$68.73	Loads	\$25.00	2
2	Broken Concrete - Large	TO	Dirt & Concrete De	\$91.18	Loads	\$25.00	2
3	Clean Fill Import	FROM	Sanitary Soil Supp	\$15.63	Tons	\$3.85	2

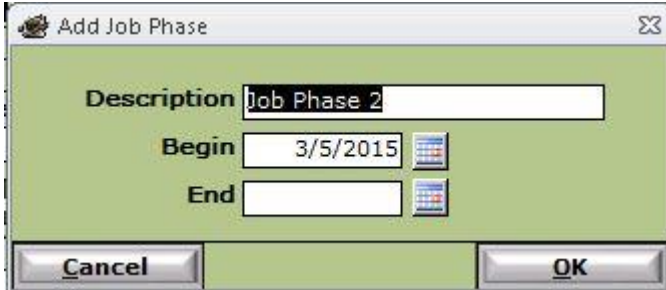


New **Edit** **Delete** **Image** **Print** **Done**

1. Customer - Entering the customer on the job is required. If the Job is for an existing customer you may choose the customer from the drop down or utilize the auto fill by beginning to enter the customer name.
2. **Note** - If the job is not for an existing customer, you can create a new customer by clicking on the Pencil box next to the customer field. The customer information window will pop up and the customer can be created without leaving the Job screen.
3. Bill To - The Bill To name and address information can be different from the customer
4. Tax Code - If sales tax will apply to any items on the Job, choose the Tax Code from the drop down.
5. **Note** - Tax Codes and Rates are maintained in Setup > Company Setup > Sales and Invoicing Tab.
6. Estimator - The Estimator field is defaulted to the user name but can be overridden.
7. Terms - The Terms are defaulted from the customer file but can be overridden to specific terms for this job only.
8. Project Name - The Project Name is the friendly name given to the project. The same name field value can be used for multiple Jobs and multiple Customers.
9. **Note** - The name filed is used in other parts of the system for lookups and also appears along with the Job Number in Invoicing.
10. Job Location - The Job Location is the actual address or other location reference of the Job. If the location of the Job already exists in the system you can choose it from the drop down. If the location is new

you may add it to the Location File by clicking the pencil box next to the Location field. The Location file window will pop up and the location can be added without leaving the Job screen.

11. PO Number - Job specific purchase order number. This number will appear on invoices for this job.
12. Comments - Fee form comments that are specific to this job.
13. Start Date - The start date is the actual start date of the job. The start date will also become the beginning date of the first phase of the job.
14. Status - The Job Status is used for sorting on the start screen
15. **Note** - The Job must be advanced to active status for Ticket Entry.
16. Wage Type - There are three system wage types: Private, Prevailing Wage State and Prevailing Wage Federal.
17. Phases - Job Phases are used to manage rate changes and different job line items for different phases of the job. For Instance, during the first phase of the job the line item rate was \$10.00. 30 days later there is a rate increase to \$11..00. Click the Add Phase button to create a new phase with the new rate.
18. **Note** - Phases become important in ticket entry. Ticket entry will look to the correct phase and rate based upon the date of the ticket.



Add Job Lines - Select the Add Job Lines button at the lower left to open the Job Line Detail Window.

Job Line Details

Commodity Item
 Dirty Dirt
 Dirty Dirt
 Equipment End Dump
 Per Loads

From
 To

Mat Site/Dump
 Dirt & Concrete Depository # 4
 Camas, WA

☒ Pay Vendor (PV)
 Vendor Dirt & Concrete Deposi Cost \$25.00

☒ Bill Customer (BC) ☐ Bill Revenue Separately

Category	Revenue	FSC	Tax
☒ Cartage	\$68.73	☐	☐
☒		☐	☐
	\$68.73		

☒ Pay Driver (PD)

Driver Type	Pay Type	Pay On	Current Rate
☒ Company Drive	Company Hol		\$30.75
☒ Subcontractor	POR 100 NO F	\$45.00	\$1.00
☒			

Pay Count 2

Dispatch Alert
 Dirty Dirt Alert!

Ticket/Timesheet Alert
 Dirty Dirt Alert!

Comment
 Add UOM

New Delete Map Bid Line Done

1. Description - This is the description of the Commodity Item or Charge. Choose an existing item by selecting from the drop down or use the auto fill by typing in the first few characters.
2. **Note** - To add a new commodity item choose <Add New Item> from the drop down. This will open the Commodity item file window without having to leave the Job Line Details screen.
3. Equipment - Select the Equipment Type.
4. From or To - Select whether this commodity item will be coming from a material site or going to a dump site.
5. Material or Dump Site - Select an existing location from the drop down or select <Add New Material Site> to open the Location file.
6. **Note** - The existing locations that supply the selected commodity will appear first on the drop down.
7. Revenue Items - Select the revenue items that apply to this line item. For each line item select whether the item is subject to sales tax or fuel surcharge. Checking Bill Revenue Categories Separately will create separate line items for each category on Invoices.
8. **Note** - Revenue Items are set up in Setup > company Setup > Files Tab.
9. Driver Pay - From the drop down select what types of drivers will be working on this line item and what type of pay they will receive.
10. Pay On - This field is used for non-hourly pay types and will calculate the pay on all or a portion of the total revenue.
11. Alert - Free form field that will pop up in ticket entry when this line is used.

Other Options - Right Click on the Job Line to open the other options menu.

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Yacolt WA 98601

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O Street & Padden Parkway
Vancouver WA

Job No.: 1001
Start Date: 2/2/2015
Status: Active
Wage Type: Private
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Contact/Ph: Allen Albright (222) 222-2222

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62 East Hwy 503
Yacolt WA 98601

Tax Code: Local Pct: 7.5% Estimator: Jill Terms: Net 30

PO Number:
Comment:
Job Phases:
Job Phase 1: 2/2/2015 3/4/2015

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Right-click context menu options:
 Open Detail
 Create Order
 View Bid Line
 Activate/Deactivate
 Change Column Order
 Change Column Width

Buttons: New, Edit, Delete, Image, Print, Done

1. Select Open Detail to open the Job Line detail window.
2. **Note** - You can also click the Open Folder Icon to open the Job Line detail window.
3. Activate / Deactivate - Selecting this option will activate or deactivate the Job Line. Deactivating the line will cause it not to transfer to a new phase of the job.
4. Change Column Order / Width - Use this to arrange and size the columns you wish to display.