

Job Closing

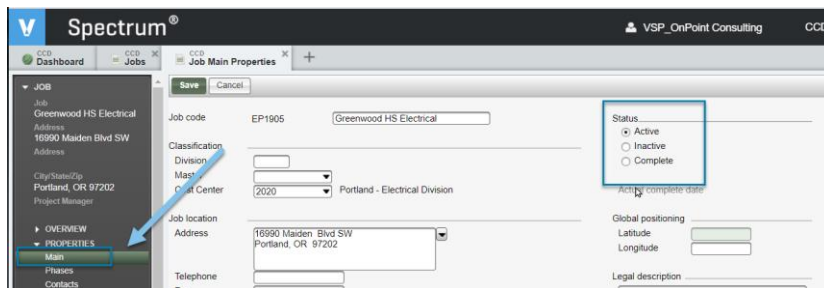
General Rules around Job Closing (subject to your specific processes)

- Keep Jobs active until substantial completion, then mark them inactive until year end when doing final WIP and financials.
- At year end mark jobs complete as part of your year-end process.
- If needed, create User Defined Fields to track Job Status in addition to Active, Inactive and Complete.

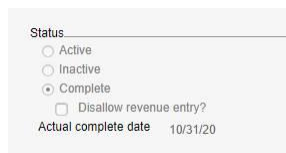
Job Status

1. **Active** – Should appear on the Contract Status Report (WIP) (CSR)
 - a. If you try to assign a new transaction to this job while Inactive is selected, you will receive a warning, but can continue entering data.
2. **Inactive** – Has work in this fiscal period, should not appear on the CSR for month end, should appear on CSR for balancing/year end
3. **Complete** – Should not appear on the CSR
 - a. If you try to assign a new transaction to this job while Complete is selected, further entry is not allowed.

Update Job Status from the Job Main Screen



- When you change to Complete:
 - Will prompt you for the Job Complete Date
 - Checking “Disallow Revenue Entry” will prevent AR Invoices



- Will auto populate the Actual Completion Date on the Job Date maintenance screen

Contract Status Report

- Will include Inactive jobs if you select Inactive, regardless of dates
- Will include complete jobs if the Job Completion Date is on or before the Through Period End Date chosen on the report selection screen

Preview | **Export** | **My Reports**

JTD Contract Status - All Jobs

Report format

- JTD contract status with YTD
- JTD contract status with MTD
- JTD contract status
- WIP schedule with backlog
- Revenue and profit forecast

Selections

Job: 19940-10

Division: ALL

Project manager: ALL

Contract type: ALL

Price type: ALL

Through period end date: 11/30/20 Fiscal year: 2020 Period: 11

Cost group: ALL

- Link to option to create earned revenue entries?
- Include Payroll in progress?
- Include A/P invoices in progress?
- Combine sub-job activity into master job?
- Use projected contract for unit price jobs?
- Show non-active jobs in summary?
- Use projected cost?
- Exclude jobs created after period-end date?

Job status

- Active?
- Inactive?
- Complete?