

JobFlow – Completing Jobs and Reviewing for Invoicing

This guide covers:

6. Completing Jobs
7. Reviewing for Invoicing

The next step is

8. Refining your settings (job templates, teams, attributes, resources, stock)

By then you will be a JobFlow pro!

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6. COMPLETING JOBS

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6. COMPLETING JOBS

Go to **Jobs** from the main menu



Search by entering the Job Code # (or customer name or trading name) in the search field.



Jobs

New: Booked: Scheduled: Completed: Rev

Job Code	Customer	Job Type	Details
16-0001	McDonald & Sons / Bill McDonald	Baling	Click to expand

Select/Click on the Job Code # eg. 16-0001

Against each task enter the actual start date, size, hrs and worked by details.

Start Date	Actual Size	Actual Hours	Worked By	Actual Price	Complete	Billing	Print
22/06/2016	ha	hr	+	\$ 500.00	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
22/06/2016	ha	hr	+	\$ 500.00	<input type="checkbox"/>	<input type="checkbox"/>	
22/06/2016	ha	hr	+	\$ 500.00	<input type="checkbox"/>	<input type="checkbox"/>	
22/06/2016	ha	hr	+	\$ 1,000.00	<input type="checkbox"/>	<input type="checkbox"/>	
22/06/2016	Ha	hr	+	\$ 500.00	<input type="checkbox"/>	<input type="checkbox"/>	
22/06/2016	Ha	hr	+	\$ 500.00	<input type="checkbox"/>	<input type="checkbox"/>	

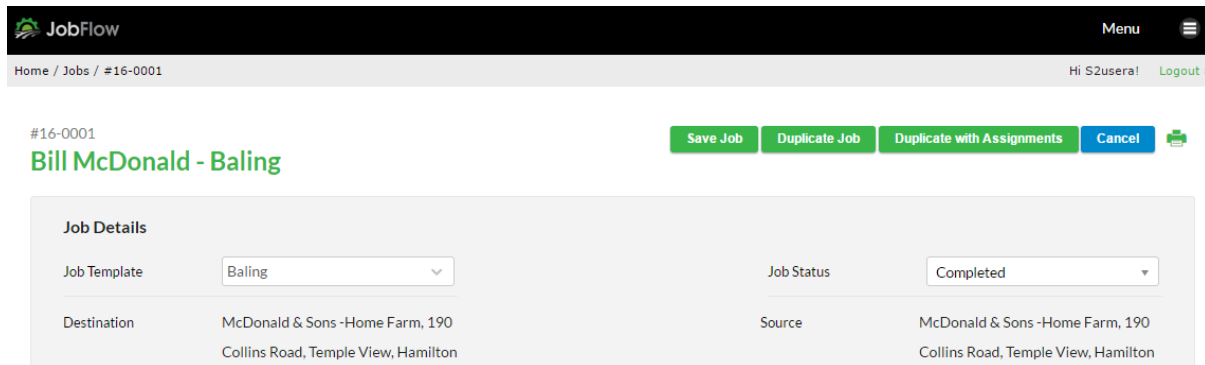
Complete each task as they are received/entered, by ticking the check box.

When all tasks are completed...

Start Date	Actual Size	Actual Hours	Worked By	Actual Price	Complete
22/06/2016	9 ha	3 hr	ClMower, JDT, GeorgeC	\$ 450.00	<input checked="" type="checkbox"/>
22/06/2016	9 ha	1.5 hr	Rake, JDT, GeorgeC	\$ 450.00	<input checked="" type="checkbox"/>
22/06/2016	9 ha	1.5 hr	Tedder, FendT, ColinF	\$ 450.00	<input checked="" type="checkbox"/>
22/06/2016	9 ha	4 hr	KBaler/Wrapper, JDT, GeorgeC	\$ 900.00	<input checked="" type="checkbox"/>
22/06/2016	9 Ha	3 hr	TrailerFlat, FendT, ColinF	\$ 150.00	<input checked="" type="checkbox"/>
22/06/2016	9 ha	3 hr	FendT, GeorgeC	\$ 150.00	<input checked="" type="checkbox"/>
		16.00		\$450.00	

Check any hours that are **red** (these are outside of a 20% variance expected) ...

...and change the status of the job to **completed**.



JobFlow Menu

Home / Jobs / #16-0001 Hi S2usera! Logout

#16-0001

Bill McDonald - Baling

Save Job Duplicate Job Duplicate with Assignments Cancel

Job Details

Job Template: Baling

Job Status: Completed

Destination: McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton

Source: McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton

7. REVIEWING FOR INVOICING

 Go to **Jobs** from the main menu

 Filter Jobs to show those **Completed** (or select **Completed** in the report on the Dashboard)...

Jobs

Select Type ▼
 New:
 Booked:
 Scheduled:
 Completed:

Job Code	Customer	Job Type	Details
16-0001	McDonald & Sons / Bill McDonald	Baling	Click to expand
16-0003	Happy Valley Farms / Bob Brown	Baling	Click to expand

... select the click to expand link

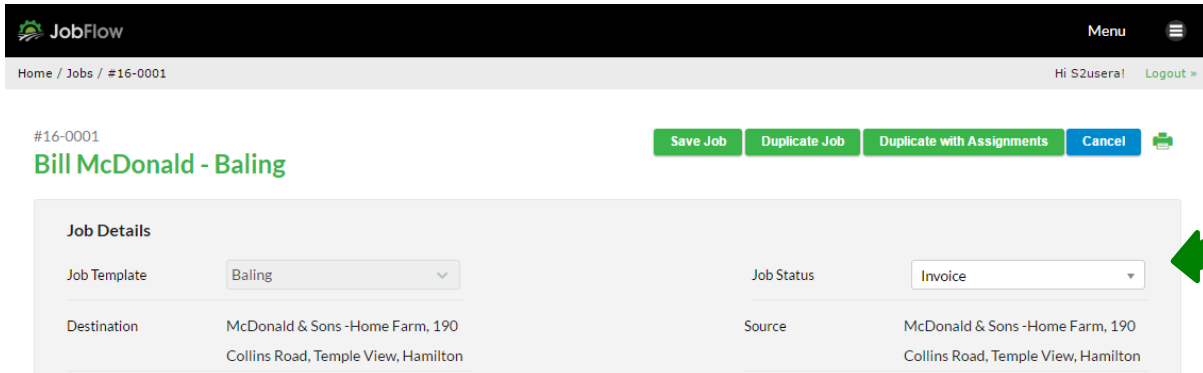
Tasks	Date	Resources	Hours	Size	Rate	Quoted	Billing	Actual Price
Mow	22/06/2016	GeorgeC, JDT, CIMower	3.00 hrs	9 ha	\$50 / ha	\$500.00	<input checked="" type="checkbox"/>	\$450.00
Rake	22/06/2016	GeorgeC, JDT, Rake	1.50 hrs	9 ha	\$50 / ha	\$500.00	<input type="checkbox"/>	\$450.00
Tedder	22/06/2016	ColinF, FendT, Tedder	1.50 hrs	9 ha	\$50 / ha	\$500.00	<input type="checkbox"/>	\$450.00
Bale/Wrap	22/06/2016	GeorgeC, JDT, KBaler/Wrapper	4.00 hrs	9 ha	\$100 / ha	\$1,000.00	<input type="checkbox"/>	\$900.00
Loading	22/06/2016	ColinF, FendT, TrailerFlat	3.00 hrs	9 Ha	\$50 / hr	\$500.00	<input type="checkbox"/>	\$150.00
Stack	22/06/2016	GeorgeC, FendT	3.00 hrs	9 Ha	\$50 / hr	\$500.00	<input type="checkbox"/>	\$150.00
Totals			16.00 hrs			\$3,500.00		\$450.00

Services	Quantity	Rate	Price
Square Silage <50ha (rake/bale/wrap/stack - per bale)	95 bale	\$49.00	\$4,655.00
Totals			\$4,655.00

Materials	Quantity	Rate	Price
Polythene Black/White (12m)	20 m	\$2,000.00	\$2,000.00
Totals			\$2,000.00

Products	Quantity	Rate	Price
Totals			\$0.00
Total			\$7,105.00

If it's all ok to invoice or you need to make a change select the **Job Code #** eg.16-0001 to open the job and amend the billing and/or change the status to **Invoice**.



JobFlow Menu

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#16-0001 **Bill McDonald - Baling** Save Job Duplicate Job Duplicate with Assignments Cancel

Job Details

Job Template	Baling	Job Status	Invoice
Destination	McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton	Source	McDonald & Sons -Home Farm, 190 Collins Road, Temple View, Hamilton

If you use Xero your invoice will be sent to Xero, appearing as a draft invoice in your Xero Accounting Software.



Xero will return the invoice no and store this against the job.

Or use the print icon at the top right of the page to print a copy of the billable line items and enter them into your accounting system.

#16-0001 - Baling

Date: 22/06/2016

Customer:	Bill McDonald	Phone:	078765432	Trading Name:	McDonald & Sons
				Mobile:	027654321
Job Date:	22/06/2016	Est. Job Size:	10 Ha	Estimated No. of Bales:	
Crop Yield:				Chopped	Mowing
Bale Type:				Stack Type:	
Inoculant Type:					
Job Comments:					

Tasks	Quantity	Price
Mow	9	\$450.00
Tasks Subtotal		\$450.00
Services	Quantity	Price
Square Silage <50ha (rake/bale/wrap/stack - per bale)	95	\$4,655.00
Services Subtotal		\$4,655.00
Materials	Quantity	Price
Polythene Black/White (12m)	20	\$2,000.00
Materials Subtotal		\$2,000.00
Total		\$7,105.00