

Overview

With the release of SedonaOffice version 5.2 build 27, many new features are available with the area of job management. This document will cover the new *Job Working Parts List* functionality. This document is divided into two areas; *Functionality*, which will describe the intended design of this new feature and *Process*, which describes how to use the new feature. No setup is required to use this new feature.

Functionality

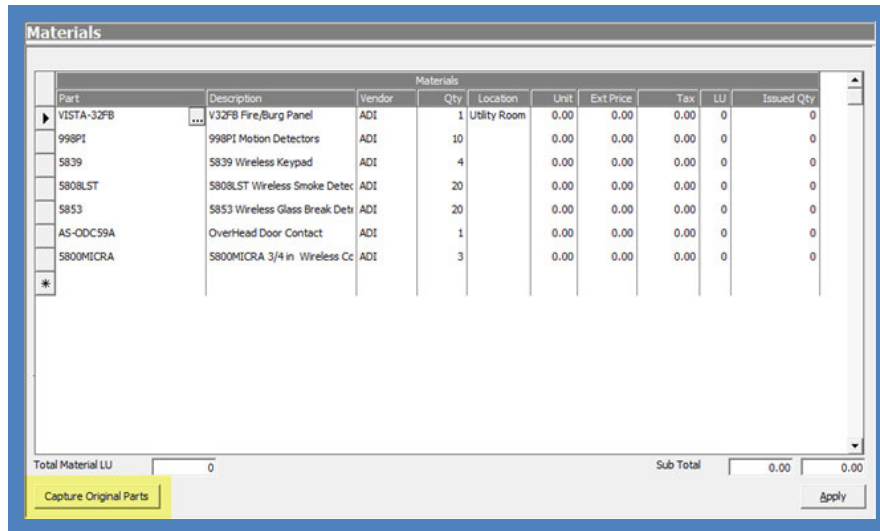
The Job Working Parts List was designed to be used when a job parts list may change after the initial data entry of the job was performed. Since the list of materials to be installed often changes from the time of the sale to the time of installation, you are able to capture the original list for reference purposes, and create a new Working Parts List that may be modified as the job progresses. If your company prefers not to use the Change Order functionality of a job, this may be a useful alternative.

Once the Materials List has been captured, you can no longer make any changes to the Original Parts List. Pressing the Capture button creates a lock on the Original Parts List.

If parts were issued to the job prior to pressing the Capture button, you will not be allowed to make changes to issued parts. You will however be able to add additional parts to the working parts list. If you have not issued any parts to the job prior to pressing the Capture button, you will be able to change quantities, labor units, unit price (if allowable on the job type setup) remove parts or add additional parts. If you have issued parts to the job but want to make a change to that part on the working parts list, you will have to perform a return to stock transaction to be able to modify the working parts list.

Process

Once the initial list of parts has been saved on the Materials form, a new button is displayed at the bottom left labeled *Capture Original Parts*. This button is dimmed out when the user first opens the Materials List. As soon as the Apply button is pressed, this button is illuminated and available for use. Make certain ALL of the initial parts have been listed prior to pressing this button.



Capture Original Parts

Once the complete initial parts list has been created and saved, the user will press the Capture Original Parts button located at the lower left of the Materials list. The user will need to leave the Material List to refresh the form. When returning to the form, two new buttons are displayed in the header area of the Materials list labeled *Working Parts List* and *Original Parts List*. You may toggle back and forth between the two Material Lists by selecting either radio button.

