# Eclipse Job Management

**Release 2.0**

# Legal Notices

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# Job Management for Eclipse Overview

Job Management is a real-time, web-based application fully integrated with Eclipse and Solar Eclipse that helps distributors manage large commercial jobs, such as construction of stadiums or commercial high-rise buildings. The application allows you to manage all aspects of a job, including the following:

- Bidding and managing the bill of materials (BOM), for multiple customers on one job if needed.

- Managing and releasing materials from your warehouse and from your vendors to the job site.

- Billing your customer for received material.

- Reconciling invoices.

- Processing change orders.

- Handling returns.

- Paying engineering fees associated with the job.

Job Management keeps track of jobs for which you take part, whether you are the quoter, job manager, A/P clerk, or have any other role associated with a job. It takes the complexity out of managing the bidding process, coordinating shipments from your vendors to a job site, and billing your customers for material on the job.

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**See Also:**

Navigation Basics

Job Management Setup Overview

Creating Jobs

# What's New in Job Management Release 2.0

Eclipse Job Management Release 2.0 includes the following enhancements.

### Branch Authorization

Job Management now respects all branch authorization settings defined for users, customers, and vendors in Eclipse. For example, if you are creating a job with Branch 1 as the shipping branch, you can only award that job to customers who are authorized to receive product from Branch 1. In addition, if a user is not authorized for Branch 1, when that user logs into Job Management, they cannot see the jobs for Branch 1. For more information, see Assigning Branches to Users, Activating a Branch for Customer Purchases, and Assigning Branch Access to Vendors in the online help available when you press **F11** from Eclipse or Solar Eclipse.

### Costs and Sell Prices

- Using the new JOB.MGMT.STK.COST.EDIT authorization key, you can restrict which users have access to edit the cost information for stock products added to a job. A user must have the authorization key to edit cost for a stock product anywhere in Job Management.

- Prior to Release 2.0, all costs for stock products were displaying as COGS, and as a result COGS in Eclipse were being updated. Job Management now displays cost information as the COMM-COST and only updates the COGS in Eclipse on override if the **Change Both COGS And Commission Cost On Override** control maintenance record is set to **Yes**. If you prefer to use COGS as your cost in Job Management, contact customer support.

- You can now add a product to a job's bill of materials or through a change order that has a zero cost or zero sell price.

### Receiving

Release 2.0 provides the following enhancements when entering receiving information for a job's material:

- As you are receiving material, you might find that you need to edit receiving information that you entered due to errors in the product, quantity, or cost information. You can now edit receiving information within Job Management. For more information, see Editing Existing Receiving Information.

- You can now reconcile a purchase order created for a job through Job Management in the EDI 810 Invoice Review Queue in Eclipse or Solar Eclipse.

- When receiving returns, you now enter information as negative amounts, as you would in Eclipse.

## Returns

Release 2.0 provides the following enhancements when you are accepting returns for items ordered for a job:

- In some cases, a customer might notify you that they have material to return to you that was originally direct shipped from the vendor to the customer. You can now return that material directly into your stock, adding it to your inventory counts. For more information, see Returning Direct Shipped Job Material to Your Inventory.

- When you enter a return ,the system creates a generation on the original sales order for the returned quantity. If you receive only a part of the original return quantity the system creates a separate generation for the return quantity you are yet to receive, thus leaving an open generation on an order. You can now cancel the remaining open return quantity through Job Management, thus eliminating the outstanding order generation. For more information, see Canceling Open Return Quantities.

- You can now receive partial return amounts. For more information, see Receiving and Reconciling Returns to Vendors.

- You can now receive returned products at a different cost or sell price than you originally sold them for. For more information see Receiving and Reconciling Returns to Vendors.

- As you are accepting returns from a job, you might find that an item you ordered as a single unit is actually shipped as separate components, and customer is returning pieces of the originally ordered item. You can now split an item into components during the return process. For more information, see Splitting Items into Smaller Components for Release, Receiving, and Return.

- You can now include special shipping instructions on return orders created through Job Management. For information, see Returning Job Material to Vendors and Returning Direct Shipped Job Material to Your Inventory.

## Bill of Materials, Change Orders, and Job Totals

Release 2.0 provides enhancements when creating the bill of materials for a job:

- For unit-priced products, you now have the ability to have units of measure other than each, such as M(1000) or C(100) for products that are direct shipped from a vendor. The price and cost for the product in that UOM is calculated to three decimal places. For more information, see Creating the Bill of Materials and Changing Unit-Priced Items Already on the Bill of Materials.

- As you are creating your bill of materials, you might find that there are items required that you do not typically stock. You can now create a nonstock product directly in the bill of materials for a job without having to go into Eclipse. For more information, see Creating Nonstock Products in the Bill of Materials.

- You can now price stock items by a particular customer when creating your bill of materials for a job. If there is only one customer on the job, the system defaults to using that customer pricing instead of the default pricing customer defined in the Job Management Administrator Settings control maintenance record.

- When you search for a stock product when adding it to a bill of material or a change order, the inventory available at the shipping branch for the job now displays in the search results.

- Job Management now supports larger job totals, into the millions of dollar. Numeric fields now include commas for better readability.

- Change order numbers are now included in all printed change orders and Hold for Release purchase orders.

## Submittal Documents

For some jobs, or for some items on a job, you might need to send a submittal document with a detailed sheet to your customer that contains details about the quantity, type, product descriptions, and manufacturers for the items on the bill of materials (BOM) prior to purchasing any products. You can now attach specification sheets for both stock and nonstock products when you are creating your submittal books for a job. For more information, see Attaching Specification Sheets to Submittals.

## Reports

Release 2.0 provides the following enhancements and additions to reports within Job Management:

- In several reports, you can now select the columns you want to include when you generate the report. For example, in the Open Bid List Report, you can select to include a column with the win confidence level you have indicated for the job. You can also remove standard columns from a report, such as removing the **Bidder** column from the Open Bid List Report. For more information, see Running Job Management Reports.

- In several reports, you can select additional criteria to include in the report or to filter the report content. For example, in the Job Won/Lost Report, you can now run the report for all your project managers, or run the report for only the project managers that you select. In addition, you can choose to include lost jobs on the report. Each report has unique selection criteria. For more information, Running Job Management Reports. For descriptions of each report, see Job Management Reports Overview.

- For each report, you can determine the font size, whether to shade headers and footers in the report, and whether you want to include your company logo on the report pages. For more information, see Running Job Management Reports.

- Numerous changes to the Change Order Report, including the ability to run for All, Only Pending, or Only Approved changes orders. Also added columns and totals tracking the job totals from the beginning of the job through the change orders.

## Administration, Searching, and Filtering

Release 2.0 provides the following enhancements for tracking jobs you are bidding, searching, and filtering jobs that you are working on:

- The Job Summary page now contains a field where you can note to which competitor you lost the job. Define your own list of competitors in the Job Management Administration page. For more information, see Defining Competitors.

- The Job Summary page now provides a location to indicate your confidence level in winning a job during the bidding process. You can define your own list of confidence levels in the Job Management Administration page. Assign a win confidence level for reporting purposes. For more information, see Defining Job Win Confidence Values.

- The Job Summary page now includes a **Project Type** field to help further the define a project for reporting purposes. Assign a job a project type, such as Commercial or Government. You can define your own project types in the Job Management Administration page. For more information, see Defining Job and Project Types.

- In the Advanced Search, you can now search by Eclipse transaction number, for example, by sales order number or payable number. For more information about searching, see Searching for Jobs.

- On the Job Management Home page, you can now sort and filter the jobs listed in the **My Jobs**, **Recent Jobs**, and **All Jobs** lists using the column headings. For more information, see Viewing Jobs.

- Job Management requires information such as default product templates and pricing branches. You can now set this information directly in Job Management in the **Host Settings** tab of the Job Management Administration page, without having to go to **Job Management Administrator Settings** control maintenance record within Eclipse. For more information, see Defining Eclipse (Host) Settings.

- Enlarged vendor search windows so you can see more of the vendor name when you are searching.

## Documents and Forms

Release 2.0 provides the following enhancements to system-generated documents and forms:

- Suppressed change order documents contain a watermark that says "Suppress" to help you identify these change orders when you are viewing documents for a job. For more information, see Previewing and Confirming Pending Change Orders and Previewing and Confirming Approved Change Orders.

- You can now suppress the return pick up document from printing.

## Job-Level and Item-Level Notes

You can now edit and delete notes when they are no long applicable.

## Logos

You can now change the logo for the application and for your forms and reports. Store your logos on your Application Server for the fastest retrieval on initial load. For more information see, Setting Logos for Forms, Reports, and Your Web Site.

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**See Also:**

Job Management Computer and Software Specifications

# Job Management Computer and Software Specifications

Eclipse Job Management is a web application designed for 1024 x 786 pixel monitor resolution. At this size, the pages should not scroll horizontally when using the default font size for the resolution. We recommend using Windows Internet Explorer 7 for Windows, and Mozilla FireFox 2 or later for Windows and Macintosh for the best results.

**Important:** If you are running Internet Explorer 8.0 and are experiencing display and other issues with Job Management, change your IE settings to run in Compatibility mode. From the Tools menu in IE, select Compatibility View.

In addition to the components that Eclipse installs for you to run Job Management, you need to do the following:

- Install Adobe Acrobat Standard version 8 or higher on the Windows server that is running Eclipse Forms. See www.adobe.com for purchase information.

- Turn off your web browser's pop-up blocker to preview PDF documents.

# Logging On and Off

Eclipse Job Management displays user-specific information pertaining to your job activity. You must log on to the application before you can enter information. Job Management keeps track of jobs for which you take part, whether you are the quoter, job manager, A/P clerk, or have any other role associated with a job.

> **Note:** When you log off of the Job Management system, be sure to use the Log Off feature to free your license. If you only close the window without logging off, the system holds your license even though you are not actively using the application.

**To log on to Job Management:**

1. Open the Job Management application.

2. In the **Login Name** field, enter the same log in identification you use in Eclipse and press **Tab**.

3. In the **Password** field, enter your Eclipse password.

4. Click **Login** or press **Enter** to display the Job Management Home page.

**To log off of Job Management:**

1. From any page in Job Management, click **Save** to save your data.

2. In the main menu bar, click **Log Off** to log off of the application.

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**See Also:**

Navigation Basics

Eclipse Job Management Setup Overview

# Managing Job Management Application Sessions

Users with the SUPERUSER authorization key assigned can use the Session Manager to monitor Job Management sessions and control active Solar Eclipse sessions. You might find it necessary to log users out of Job Management sessions throughout your work day.

**To log users out of Job Management using the Session Manager:**

1. From the Solar Eclipse **File** menu, select **Session Manager** to display your Session Manager page.

   You can also access the Session Manager by opening a web browser and accessing your Java Web Start page. In the **Address** field, type your Eclipse server's hostname or IP address and the Solar port number (such as http://rs6k:2080 or http://<ipaddress:2080)) and press **Enter** to access the page. Scroll to the **Application Management** section and click **Session Manager** to display the Session Manager page.

2. When prompted, enter your Solar Eclipse login name and password.

3. In the **Job Management** section, find the user you would like to log out and click **Logout Session** next to the user's entry in the list.

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**See Also:**

Logging On and Off

# Defining Your Display Settings and Defaults

Before creating jobs in Eclipse Job Management, define your preferred display settings and application defaults. Setting your user profile saves you time when accessing areas of the system that you use most frequently. You can update your profile settings at anytime.

**To define your user profile:**

1. From any page in Job Management, click **My Profile** in the footer to display the My Profile dialog box.

2. Select an option for each of the following display settings:

| Field | Description |
|---|---|
| **Selected Skin** | Select the color scheme in which you would like to view the application |
| **Language** | Select the language in which you like to use the application. |
| **My Home** | Select the page to which you would like the application to display when you log on and when you click **Home** in the menu bar. <br><br>• **Default** - Displays the **My Upcoming Deadlines**, **Jobs**, and **Create Job** section when you click **Home** in the menu bar. Select this page as your Home page if you frequently create jobs, or need to monitor the progress of a job. <br><br> The content of this Help system is written assuming that you have Default selected as your Home page. <br><br>• **Create Job** - Displays the **Create Job** section when you click **Home** in the menu bar. Select this page as your Home page if you create jobs regularly, but do not need to monitor the progress of jobs. <br><br>• **Receiving** - Displays the **Open By Job Type** chart and jobs that have orders that you have not yet received into the system when you click **Home** in the menu bar. Select this page as your Home page if receiving orders for jobs is your primary responsibility. |

3. Select an option for each of the following application defaults. You can leave any or all of the application defaults blank.

| Field | Description |
|---|---|
| **Price Branch** | Select the default pricing branch to use for pricing and when searching for invoices. If a user opens a job for which a price branch is not assigned, the system assigns the job's price branch to the setting for that user in this field. |
| **Ship From Branch** | Select the default branch from which stock products ship. If a user opens a job for which a ship from branch is not assigned, the system assigns the job's ship from branch to the setting for that user in this field. |
| **G/L Sales Source** | Select the default profit center that sold the product, for example, outside Sales or counter sales. |
| **Default Printer** | Select the printer that you use most often. This printer acts as the standard printer unless you select a different one when printing documents and given the option to select a printer. |

As you enter information in the application, fields with these same labels populate with your default selections.

4. Select or enter an option for each of the following communication preferences:

| Field | Description |
|---|---|
| **Reminder Method** | Select how you want to receive reminder messages from Job Management, either through e-mail message or by text message to your wireless device. |
| **Email Address** | Enter your e-mail address. This is the address the system sends reminder messages to, and is also the default address the system populates when you are sending documents, such as Release POs from the system. |
| **Default CC** | Enter the address to which you want to copy system-generated documents, such as Release POs. Other recipients of the e-mail can also see these addresses. |
| **Default BCC** | Enter the address to which you want to copy system-generated documents, such as Release PO. Other recipients of the e-mail cannot see those addresses you add as BCC. Also, the BCC recipient cannot see who else received the e-mail. |
| **Contact Phone Number** | Enter your primary contact phone number. |
| **Text Message Phone Number** | To receive reminders from the system through text messages, enter the phone number to which you want those messages sent. |
| **Wireless Provider** | Select your wireless provider from the list to receive reminder messages by text message. |
| **Form Signature** | Enter any free form text that you want to display on the bottom left of all system-generated forms. For example, you might use this as contact information for the person who created the form, or as a standard message to your vendors and customers. |

5. Click **Update Profile** to save your changes or click **Cancel** to exit the dialog box without saving your changes.

# Job Management Setup Overview

Before you create jobs in Job Management, set the appropriate Eclipse authorization keys to define each users' permissions within the application and define default values, such as a list of commonly used vendors and job types, for the jobs that you manage. All users throughout the application commonly use the default values when creating jobs. The Administration page maintains your default values universally for all jobs. We recommend that you carefully consider the values to maintain accurate and consistent information for your jobs.

To set your personal application defaults and display settings, see Defining Your User Profile.

## Product Setup

- **Default product template** - The default product used when creating the bill of materials (BOM) for a job, prior to awarding the job to a customer. The system uses the default product to calculate cost and price information. When you convert the BOM into orders in Eclipse, the line items look like real items on the order in Eclipse, but the system uses the default product template so that non-stock items are not created for direct ship items for the job.

  Set up the product you want to use as the default product template as a non-stock product.

- **Engineering fee products** - A non-stock product record used on direct orders created with any engineering fees.

- **Miscellaneous charge products** - A non-stock product record for adding miscellaneous charges, such as restocking fees for returns.

## Authorization Keys

Eclipse Job Management contains several authorization keys that define users' permissions throughout the application. You can assign authorization keys to templates that correspond with job descriptions for Job Management to help ensure consistency in user permissions. Creating templates also speeds up the process of assigning authorization keys for Job Management functions. You can also assign authorization keys individually to each user.

For more information about the authorization keys specific to Eclipse Job Management, see Authorization Keys for Job Management.

## Control Maintenance Records

Set the parameters in the Job Management Administrator Settings Management Administrator Settings control maintenance record prior to running Eclipse Job Management.

| Parameter | Description |
| --- | --- |
| **Default Product Template** | (Required) Select the product record to use as a template when working in Job Management. You can override this setting at the vendor level. <br><br> You can override this product template at the vendor level in Vendor Maintenance (**File > Vendor > Additional Vendor Information > Job Management**). |
| **Default Engineering Fee Product** | (Required) Select the non-stock product record to use on direct orders created with any engineering fees. The product is used on the direct orders for billing and general ledger posting purposes. |
| **Default Print Status** | Select the invoice print status for direct invoices when your Accounting or Job department receives material. For example, select **No** for no printing or **B** for batch printing. |
| **Customer Used for Pricing** | Select the customer to use to determine pricing for stock items added to BOMs for a job you are bidding that has multiple customers. This customer is used to get the pricing as close as possible while bidding jobs. You can apply all the tools available in Eclipse for pricing to this customer, and Job Management respects all the settings, including rebates. <br><br> If you are building a BOM for a job that has only one customer, or once you have awarded a job, the system uses the pricing for that customer for stock items, instead of the default customer. |
| **Branch Used for Pricing** | Select the branch to use for pricing for job management orders. The availability of stock items for a job is based on the job's ship branch. |
| **Write Off Account** | The general ledger account to use for returns if the vendor credit is less than expected, and you want to write off the difference rather than debit it back to the customer. |
| **Default AP Approval Flag** | Set this field to **Yes** to have all payables created for jobs in the Job Management application set to Approved when they are written to Eclipse. Setting this field to **Yes** gives your project managers the ability to approve payables that are in balance directly from the web application and allows you to pay invoices before they have been reconciled. <br><br> If you prefer that your Payables clerk review each payable for a job and approve them while your Job Management project manager enters the receiving information for the job, set this field to **No**. |

| Parameter | Description |
|---|---|
| Receiving URL | Automatically directs your accounts payable personnel entering Job Management payables on the Eclipse system to to the Job Management system to finish the payable process there. This can be set by the Job Management administrator and is the URL they use to get to Job Management. Enter:<br><br>http://eclipse-server-IP:PORT/jobManagement/payable.seam<br><br>Enter a URL in this field if your accounts payable department is primarily responsible for completing the receiving for orders in Job Management.<br><br>Leave this field blank if someone in your Job department or a single accounts payable person is responsible for finalizing receiving in Job Management. |
| Allow Awarding Job When Customer on Credit Hold | Enter **Yes** to allow a job to be awarded to a customer who is currently on credit hold. Hold for Release purchase orders and Release purchase orders are not printed regardless of how this setting is set if the customer is on credit hold. However, you are able to award the job to the customer. |
| Default Print Style | Select the print style to use for invoices printed for orders created for a job. If you enter a print style here, it overrides the Orders print style for Job Management invoices. |
| AP Difference Account | Select the account the system uses for disputed differences in payables when receiving less than what you have reconciled. If this field is blank, the system uses the Unapproved AP account. |
| Use Quoter as Writer | Enter **Yes** to use the quoter of a job as the order writer for jobs that your company creates. Setting this field to **No** uses the Project Manager as the writer for a job. The default setting is **No**. |
| Use for Inside Sales | Select whom the system uses as the inside sales person on orders created in Job Management. The default setting, **Use Customer**, uses the inside sales person assigned in Customer Maintenance for the winning customer. |
| Specification Sheet Profile | Enter the location where the specification sheet or image for your stock products reside. You can attach the sheets or images to submittal documents for a job. Attach the image to the product record in Product Maintenance. |

You can also update these settings through the Host Settings tab on the Job Management Administration page.

## Default Values

Default values set once in Job Management display throughout the application in drop-down lists or are retrieved from search fields. Define the following default values on the Job Management Administration page:

- Job Types
- Job Statuses
- Line Item Statuses

- Vendors

- Ship Via and Freight

- Documentation Imaging and Printer Settings

- Host Settings

You must be assigned the JOB.MGMT.ADMIN authorization key to set default values.

# Authorization Keys

Job Management contains several authorization keys that define users' permissions throughout the application. You can assign the authorization keys to templates that correspond with job descriptions. Assigning a template to a user is a fast and consistent way to assign all the authorization keys in the template.

You can also assign individual authorization keys to users.

The following authorization keys apply to Job Management functionality:

| Authorization Key | Description | Applicable Job Role |
|---|---|---|
| JOB.MGMT.ADMIN | Enables a user to setup default system values. | Coordinator |
| JOB.MGMT.AWARD.JOB | Enables a user to verify bill-to and ship-to customers, add job instructions, and to add additional information for a job. | Project Manager |
| JOB.MGMT.BID | Enables a user to adjust vendor pricing, send bids to customers, and send requests for quotes to vendors. | Bidder/Quoter Project Manager |
| JOB.MGMT.BOM | Enables a user to add items, components, and lots to a job. Also enables a user to assign vendors and stock, create custom bills of materials (BOMs) and to view BOMs. | Bidder/Quoter Project Manager |
| JOB.MGMT.CHANGE.ORDER | Enables a user to enter and approve change orders. | Project Manager |
| JOB.MGMT.CREATE.JOB | Enables a user to create jobs. | Coordinator Project Manager |
| JOB.MGMT.EDIT.STK.COST | Enables a user to edit the cost on stock products when creating the BOM, comparing vendor prices, creating change orders, and entering returns. | Bidder/Quoter Project Manager |
| JOB.MGMT.MAINTAIN.CUST | Enables a user to send bids to customers. | Coordinator Project Manager |
| JOB.MGMT.MAINTAIN.REPS | Enables a user to send requests for quotes to vendor or manufacturer representatives. | Coordinator Bidder/Quoter Project Manager |
| JOB.MGMT.MAINTAIN.VEND | Enables a user to send RFQs to vendors. | Coordinator Bidder/Quoter Project Manager |
| JOB.MGMT.MANAGE.PO | Enables a user to create Hold for Release and Reserve purchase orders. Also enables a user to create release purchase orders and to release stock items. | Project Manager |

| Authorization Key | Description | Applicable Job Role |
|---|---|---|
| JOB.MGMT.RECEIVE.MATERIAL | Enables a user to enter vendor invoices and reconcile those invoices against products received. | A/P Clerk |
| JOB.MGMT.RETURN | Enables a user to create a return. | A/P Clerk |
| JOB.MGMT.SUPERUSER | Gives a user access to all features and functions within Job Management | Company manager |

**See Also:**

Setup Requirements for Job Management

# Defining Eclipse (Host) Settings in Job Management

Job Management requires information such as default product templates and pricing branches. You can set this information in the Job Management Administrator Settings control maintenance record within Eclipse or directly in Job Management in the Host Settings tab of the Admin page.

Set the host settings prior to using Job Management to create jobs. You must be assigned the JOB.MGMT.ADMIN authorization key to set the Job Management settings.

> **Note:** If changes are made to the pricing settings in the **Job Management Administrator Settings** control maintenance record, you need to log out of Job Management and back in for them to take affect.

**To view and edit host settings:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Host Settings** tab.

   The page displays the settings as they are defined in the Job Management Administrator Settings control maintenance record.

2. Review and edit the fields, as necessary.

# Defining Job and Project Types

Your business may require categorizing jobs into types depending on the products you sell for specific jobs, for example, gear or lighting. Assign job types when you create the job on the Job Management Home page. We recommend that you start each job type with a different letter because when the application generates a job ID, it uses the first two letters of the job type as the first two characters in the job ID. For example, if you have a job type called Lighting, job number Li-121807-11402 is a lighting job.

In addition, for each job, you can assign a project type, such as Commercial or Retail to help classify your jobs when you report from Job Management.

You must be assigned the JOB.MGMT.ADMIN authorization key to define job and project types.

**To define a job type:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page, and select the **JobSettings** tab.

2. Navigate to the **Job Types** section of the page.

3. In the **Enter a Type Name** field, enter a name that describes the products sold for this job, such as Lighting, and then click **Add Job Type**.

   The system uses the first two letters of the job type as the first two characters of the job number.

   **Note:** Job names must be 15 characters or less.

4. In the **Job Types** field, select the job type you just added.

5. In the **Description** field, enter a statement that describes the job type you have selected.

   When you select items in the **Job Types** field, the **Description** field displays the description for that job type. Edit the description, as needed.

6. Select an image to associate with the job type. For example, if you have a job type called "Lighting," select the light bulb icon.

   The icon you select displays with the line items in the bill of materials for a job assigned this type.

7. Click **Save Page** to save your changes.

   Repeat step 3 to step 6 to add additional job types.

**To delete a job type:**

1. From any page in Job Management, click **Admin** in the menu bar to display the Job Management Administration page.

2. Navigate to the **Job Types** section of the page.

3. In the **Job Types** field, select the job type you want to delete and click **Remove Type**.

Any jobs that exist that are assigned the deleted job type are unaffected if you remove the type. After you remove the type, you do not have the option to assign it to new jobs.

**To define a project type:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page, and select the **JobSettings** tab.

2. Navigate to the **Job Project Types** section of the page.

3. In the **Enter a Project Type** field, enter a type that describes a project, such as Commercial or Government and then click **Add Project Type**.

4. Click **Save Page** to save your changes.

    Repeat step 2 to step 4 to add additional project types.

**To delete a project type:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page, and select the **JobSettings** tab.

2. Navigate to the **Job Project Types** section of the page.

3. Select the project type you want to remove, and click **Remove Project Type**.

4. Click **Save Page** to save your changes.

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**See Also:**

Eclipse Job Management Setup Overview

Completing Job Details

# Defining Job Statuses

A job status identifies the phase a job is in, such as Bidding, In Process, or Complete, can help you determine what action needs to happen next for a job, and are useful in reporting. The job status displays on the Job Summary page and on the Home page for a job. Phases on a job are not automatically advanced. You are responsible for changing the status in the **General Information** section of the Job Summary page when the job moves to a new phase. You can define auto-assigned statuses when the job is created or awarded.

You must be assigned the JOB.MGMT.ADMIN authorization key to define job statuses.

**To define a job status:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Job Settings** tab.

2. Navigate to the **Job Statuses** section of the page.

3. In the **Enter a Status Name** field, enter words or phrases that identify a status you want to track during the course of a job and click **Add Job Status**.

   The system adds the new status to the **Job Statuses** field.

4. In the **Job Statuses** field, select the status you just added.

5. In the **Description** field, enter a statement that defines the job status you have selected.

6. To have the system automatically move the job into the status when it is either created or awarded to a customer, select **Created** or **Awarded** from the **Auto assign this status when the job is** drop-down list.

   Setting this field can save you maintenance time, and ensures that jobs are sitting in consistent statuses. Leave this field blank to use the job status as one that you manually set.

   Only one job status can be assigned to **Created**, and only one assigned to **Awarded**.

7. Click **Save Page** to save your settings.

   Repeat step 3 to step 7 to add additional job types.

**More Options When Defining Job Statuses**

| To... | Do this... |
|---|---|
| delete a job status | select the job status in the **Job Statuses** field and click **Remove Status**. <br> Any jobs that exist that are assigned the deleted job status are unaffected if you remove the status. After you remove the status, you do not have the option to assign it to new jobs. |
| change a job status in any active job | from anywhere in an active job, click **Job Summary** in the menu bar, and then select a new job status from the **Job Status** field. |

| To... | Do this... |
|---|---|
| edit a job status description | select the status in the **Job Status** field to display its description and make updates to the description, as necessary. |

**See Also:**

Job Management Setup Overview

# Defining Line Item Statuses

Define a list of statuses that you use to identify line items in a bill of materials or a submittal, such as Awaiting Cost, Hold, on Submittal, or Release. For each line item status, designate the status a product can be in for releasing for shipment from the vendor. Line item statuses are used in the bill of materials, submittals, when releasing items to customers, and when creating change orders.

> **Note:** Line item statuses are independent of job statuses, and are used for informational purposes as you work through the process of ordering items for a job.

When you create purchase orders, the system uses the line item statuses assigned to items to indicate items as eligible for release to the customer.

You must be assigned the JOB.MGMT.ADMIN authorization key to define line item statuses.

**To define a line item status:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Job Settings** tab.

2. Navigate to the **Line Item Statuses** section of the page.

3. In the **Enter an Item Status Name** field, enter the word or phrase that identifies the statuses of line items you want to track during the course of a job and click **Add Item Status**.

4. In the list of line item statuses, select the status you just created and select one of the following action designations, if needed. You can also leave the **Status Actions** selection blank, indicating that there is not an action associated with the status.

   - **Item Can Be Released** - Any quantities associated with this product can be shipped to the customer if the line item is in this status.

   - **Item Cannot Be Released** - Provides a warning status on the Manage POs page that indicates that an item is still in a status tagged as eligible for release. The warning is only an informational indication, and does not prevent you from releasing the item.

5. Click **Save Page** to save your changes.

   Repeat step 3 to step 5 to add additional line item statuses.

**More Options When Defining Line Item Statuses**

| To... | Do this |
|---|---|
| delete a line item status | select the line item status in the **Line Item Statuses** field, and click **Remove Item Status**.<br>If you delete a status currently in use by items in a bill of materials, those items display with no status. |

# Defining Shipping Methods and Freight

Define the default ship via and freight for your shipping branches. Job Management retrieves ship via information from the Eclipse Ship Via Maintenance file. Ship via and freight terms display in the **Default Settings** area on the Job Summary page of the application.

If you do not set default shipping and freight information, you need to enter the information manually for each job.

You must be assigned the JOB.MGMT.ADMIN authorization key to shipping methods and freight settings.

**To define the default shipping method and freight:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Job Settings** tab.

2. Navigate to the **Other Defaults** section of the page.

3. Enter default settings for the following shipping options:

   - **Ship Via (Vendors)** - Enter the default ship via that most often applies to your vendors. You can override this ship via for a job in the **Default Settings** area on the Job Summary page. The system validates your entry against ship vias defined in Eclipse Ship Via Maintenance.

   - **Ship Via (Distributor) -** Enter the default ship via that most often applies to your shipping branches. You can override this ship via for a job in the **Default Settings** area on the Job Summary page. The system validates your entry against ship vias defined in Eclipse Ship Via Maintenance.

   - **Default Vendor Freight Terms** - Select from the list of vendor freight terms defined in the Eclipse Vendor Freight Terms Maintenance control maintenance record.

4. Click **Save Page** to save your changes.

---

**See Also:**

Job Management Setup Overview

# Setting the Final Billing Percent Threshold

As you are receiving orders, you can set the system to prompt you when you are within a certain percentage of completing receiving for all the material from a vendor on the job. This can be helpful for billing for material that is lot priced on a job to avoid under billing.

For example, you set the Final Billing Percent Threshold to 10 percent, and Vendor A has $1000 in material on a job. If you receive a bill that brings the vendor's invoice amount between $900 and $999.99, then the system prompts you that you are within 10 percent of completion of receiving for Vendor A. You might decide at this time to bill the remaining sell amount if the material.

**To set the final billing percent threshold:**

1.  From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Job Settings** tab.

2.  Navigate to the **Other Defaults** section of the page.

3.  In the **Final Billing Percent Threshold** field, enter a percentage of the billing amount at which you want to receive a warning message in receiving.

4.  Click **Save Page** to save your changes.

---

**See Also:**

Receiving Orders Overview

Receiving and Reconciling Orders

# Defining Competitors

As you create jobs in Job Management, you can mark the jobs that you have lost without deleting them. When you mark a job as lost, you can also select the competitor to which you lost the job for reporting purposes. Prior to selecting a competitor, you need to define the list of available competitors from which users can select.

**To define a list of competitors:**

1.  From any page in Job Management, click **Maintenance** in the footer to display the Maintenance page.

2.  Navigate to the **Competitor Maintenance** section of the page.

3.  In the **Add a New Competitor** field, enter the name of a potential competitor you might be competing against when bidding a job and click **Add Competitor**.

4.  Repeat steps 2 and 3 for competitors that you plan to use in Job Management.

5.  Click **Save** to save your changes.

    To delete a competitor from the list, select the competitor you want to remove in the **Competitors** list and click **Delete Competitor**. Deleting a competitor here only removes it from the list.

---

**See Also:**

Marking Jobs as Lost

# Defining Job Win Confidence Values

As you create jobs in Job Management, you track how confident you are in winning the job. Confidence levels are included for each job you are bidding in the Open Bid List Report. Prior to selecting a confidence level you need to define the list of available levels from which users can select.

**To define a win confidence level:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Job Settings** tab.

2. Navigate to the **Job Win Confidence Values** section of the page.

3. In the **Enter a Win Confidence Value** field, enter the word or phrase that identifies how confident you are hat you are going to win a job. For example, Low, Medium, or High, or a range of percentages.

4. Click **Add Item Status**.

5. Click **Save Page** to save your changes.

6. Repeat step 3 to step 5 to add additional confidence levels.

**More Options When Defining Job Win Confidence Values**

| To... | Do this... |
|---|---|
| delete a confidence value | select the value in the **Job Win Confidence Values** field, and click **Remove Win Confidence**. |

**See Also:**

Completing Job Details

# Defining Vendors and Their Representatives

You can retrieve vendor or rep information entered on the Maintenance page from any vendor field in Job Management. You can also remove a vendor or a rep from a job if they are not needed, and you can add other vendors and reps to a job as needed.

You must be assigned the JOB.MGMT.ADMIN authorization key to define default vendors and their representatives. After you create a job, only the default vendors and representatives that match the price branch for the job are copied over to that job.

> **Note:** You only need to set up vendor reps if you pay engineering fees to a representative. However, if you are requesting quotes during the job bidding process, adding vendor reps allows you to sent a Request for Quote directly from Job Management to the representative.

## Defining Default Vendors and Default Reps

Define a list of default vendors and associated representatives (reps) to select from on any job in Job Management. The vendors and reps you enter in Job Management must have vendor records defined in Vendor Maintenance.

**To define a default vendor available for selection on any job:**

1. From any page in Job Management, click **Maintenance** in the footer to display the Maintenance page.

2. In the **Add a New Vendor** field, enter the name of a ship-from vendor that handles direct shipments. The list only includes vendors assigned to the price branch for the job.

3. Click **Add Default Vendor**. The vendor's short name displays in the **Vendors** field. Vendor short names are defined in Eclipse Vendor User-Defined Data.

   **Note:** Each vendor is validated through Eclipse Vendor Maintenance.

4. Repeat steps 2 and 3 for all vendors that you plan to use in Job Management.

5. Click **Save** to save your changes.

   To delete a default vendor, select the vendor you want to remove in the Vendors list and click **Delete Vendor**. Deleting a vendor here only removes it from the default vendor list. You can still add the vendor to an individual job if needed.

**To define a rep available for selection on any job:**

1. From any page in Job Management, click **Maintenance** in the footer to display the Maintenance page.

2. In the **Select a Rep** field, select the rep you want to make available for selection on any job.

   If the rep is not available in the list, define the rep. You can only add a vendor as a rep that you have defined as a rep.

3.  Click **Add to Default Reps** to make the representative available for selection on any job.

4.  Click **Save** to save your changes.

    To delete a default rep, select the rep in the Default Manufacturer's Representatives list and click **Delete Default Rep**.

## Associating Reps with Vendors

Setting up vendor and rep relationships saves you from manually entering vendors when creating jobs and requesting quotes, and indicates to the system which vendors are actually a manufacturer's rep. You can then add the manufacturer rep to a job for any engineering fees they might want to collect.

**To define a default rep for association to a vendor:**

1.  From any page in Job Management, click **Maintenance** in the footer to display the Maintenance page.

2.  In the **Search for Rep** field, enter the name of a representative associated with a Job Management vendor.

    The system validates your entry against the vendors defined in Vendor Maintenance in Eclipse.

3.  Click **Add to Default Reps** to add the rep's name to the **Associate Reps with Vendors** field.

4.  Repeat steps 2 and 3 for all reps that you want to associate with Job Management vendors.

5.  To add a note regarding the representative, enter any notes in the **Notes for** field that displays when you select the vendor.

    The notes you enter here display in the Job Summary page when you click the reps and in the Receiving Material page to provide information to your accounting department about applicable engineering fees. For example, you might enter a note in this field that indicates not to pay the vendor or engineering fees until all of the product ordered from them ships.

6.  Click **Save** to save your changes.

    To delete a rep, select the rep in the **Associate Reps with Vendors** field, and click **Delete Rep**.

**To associate a rep with a vendor:**

1.  From any page in Job Management, click **Maintenance** in the footer to display the Maintenance page.

2.  Define vendors and reps to use in jobs in Job Management.

3. From the **Associate Reps with Vendors** field, select the rep you want to associate with a vendor.

   **Note:** When you select the rep, if this rep has vendor associations, the associated vendors display below, in the Associated Vendor Details table.

4. In the **Search for the associated vendor** field, enter the vendor's name to associate with this rep.

   The vendor must exist in the default vendor list.

5. Click **Add Vendor to Rep** to associate the representative with the vendor.

   The system adds the vendor to the bottom of the Associated Vendor Details table for the rep.

6. If you want to note anything about the vendor to rep relationship, enter any notes in the **Notes For** field. These notes display in the Job Summary page when you click the rep and in the Receiving page.

7. Click **Save** to save your changes.

   To delete an associated vendor from a rep, click the garbage bin icon next to the vendor in the Associated Vendor Details page.

---

**See Also:**

Job Management Setup Overview

# Setting Vendor-Specific Default Product Templates

For each vendor you do business with, you can enter a product to act as a template when you are creating bills of material and nonstock products within Job Management. This product's price line and buy line information are used when adding products to a job that do not yet have pricing information defined.

**To set a vendor-specific default product template in Solar:**

1. From the **Maintenance** menu, select **Vendor** to display the Vendor Maintenance window and display the vendor for which you want to set a default product template.

2. From the **Additional** menu, select **Job Management** to display the Job Management Product Template window.

3. In the **Product** field, enter any product in the system that you want to use as the vendor's default product template in Job Management when creating the bill of materials.

   The product you enter here overrides the **Default Product Template** defined in the Job Management Admin Settings control maintenance record for this vendor. If you leave this field blank, the system uses the default product defined in the control maintenance record. You can also set the default product directly in Job Management using the Host Settings.

**To set a vendor-specific default product template (Eterm):**

1. From the **Files** menu, select **Vendor** to display the Vendor Maintenance screen and display the vendor for which you want to set a default product template.

2. Use the **Add'l Data** hot key and then the **Job Management** hot key to display the Job Management Product Template screen.

3. In the **Description** field, enter any product in the system that you want to use as the vendor's default product template in Job Management when creating the bill of materials.

   The product you enter here overrides the **Default Product Template** defined in the Job Management Admin Settings control maintenance record for this vendor. If you leave this field blank, the system uses the default product defined in the control maintenance record. You can also set the default product directly in Job Management using the Host Settings.

# Defining Form, Image, Fax, and E-mail Settings

Each job you bid and process can contain many printed documents through the bidding and purchasing processes. You can set up specific printers for Job Management and also set the directory where Job Management saves copies of all the forms it prints.

- Define a directory to save and archive forms, including an image profile.

- Define the e-mail and fax server.

You must be assigned the JOB.MGMT.ADMIN authorization key to define forms settings and printer defaults.

To set up information that displays in the footers of your forms, see Defining Notes for Form Footers. For more information about viewing documents that the system generates and archives, see Viewing Documents Generated for Jobs.

**To define a directory for archiving forms:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Document Imaging** tab.

2. In the **Forms Generation** area, enter the directory path for the following documents:

   - **Job Management XML Directory** - Job Management writes an XML document to a shared folder when it want Eclipse Forms to product a PDF. This folder is typically a SAMBA share on the Job Management server. This path specifies where Job Management saves the XML document. For example, /u2/eclipse/forms-out/jmForms.

   - **Job Management PDF Directory** - After Eclipse Forms produces a PDF document, it saves it to a shared folder. Typically the folder is a shared directory on the Eclipse Forms server. This field contains the path that Job Management uses to read the PDF document. For example, /EclipseServer/JobMgmtForms.

   - **Web Service URL -** The first part of Job Managements web address.

   - **Eclipse Forms XML Directory -** The Eclipse Forms sever uses this path to read the XML written to the Job Management XML Directory. For example, \\EclipseServer\JobMgmtForms\jmForms\.

   - **Eclipse Forms PDF Directory** - After Eclipse Forms products a PDF, it saves it to this shared directory. For example, C:\JobMgmtForms.

   - **Logo Path** - The path to your company logo that displays in Job Management and on forms and documents created from Job Management. For example, C:\JobMgmtForms\logo.gif.

   - **Transfer Method** - The Eclipse Forms software can reside on a different server than Job Management. This setting tells the application how to transfer forms information from the forms server to Job Management. Select the option that best fits your network setup.

>   If the forms server is on your Intranet network, select **Local** and address the server through an http address. If you select FTP or Samba to connect to the forms server on a different network, enter your user name and passwords to connect to the network in the appropriate fields.

3.  Click **Save Page** to save your changes.

**To define an image profile for attached documents:**

1.  From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Job Settings** tab.

2.  Navigate to the **Other Defaults** section of the page.

3.  In the **Image Profile** field, enter the profile to use to store images attached to jobs.

4.  Click **Save Page** to save your changes.

**To define e-mail and fax server information:**

1.  From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Document Imaging** tab.

2.  In the **Email Server** field, enter the name of the computer on your network used to send e-mails.

3.  In the **Fax Server** field, enter the name of the computer on your network used to send faxes.

4.  If you defined a fax server in step 3, in the **Fax Prefix** field, enter the key combination required to send a fax.

    For example, to access an outside line, your company might require that you enter #8 prior to dialing the telephone number to which to send the fax.

# Setting Logos for Forms, Reports, and Your Web Site

Each job you bid and process can contain many printed documents through the bidding and purchasing processes, and you can create different reports that contain information about the jobs in your system. You can specify a logo that appears on all reports and forms that the system generates for jobs within Job Management. In addition, you can set different logos for forms generated for each price branch, as necessary.

Logo files must be saved in a standard graphic file format, such as BMP, GIF, JPG, or .PNG. We recommend saving your logos on your Application Server for the fastest retrieval.

> **Note:** If you set up branch-specific logos, the system uses the price branch to determine which logo to use on generated forms. For reports, the system uses the user's price branch as defined in their user profile.

When you run a report, select the **Include Company Logo on Report** check box in the report settings to include the logo.

**To set logos for all forms, reports, and your web site:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Document Imaging** tab.

2. In the **Logos** area, enter the directory path for each of the following:

   - **Web** - Enter the directory path to the logo you want to display on your Job Management web site.

   - **Report** - Enter the directory path to the logo you want to display on all reports generated in Job Management, such as the Open Bid List report. The Job Management server must have access to the location where the logo file is stored. We recommend copying and storing the logo on the Job Management server.

   - **Form -** Enter the directory path to the logo you want to display on all the documents, generated for a job, such as purchase orders and submittals. The Eclipse Forms server must have access to the location where the logo file is stored. We recommend copying and storing the logo on the Eclipse Forms server.

3. Click **Save Page** to save your changes.

   The system uses the logos you set for any report or form it generates from the point when you change the logo going forward. It does not regenerate forms created prior to changing the logo.

**To set a branch-specific logo:**

---

**Important:** If you set a branch-specific logo, the system uses that logo at that branch for the selected document type, instead of the logo specified for All branches.

---

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Document Imaging** tab.

2. In the **Logos** area, select and enter the following information and click **Add Logo**.

| Field | Description |
|-------|-------------|
| **Branch** | Select the branch at which the logo applies. For example, you might have branches in different geographic locations for which you use specific logos. Set a branch-specific logo for each of your branches as necessary. |
| **Type** | Select which document types use the logo:<br>• **Report** - Includes the logo on any report generated in Job Management, such as the open bid report.<br>• **Form** - Includes the logo on any document generated in Job Management, such as purchase orders and submittals. |
| **Path** | Enter the path to the location where the logo file is stored.<br>If you are setting a logo for reports, the Job Management server must have access to the location where the logo file is stored. If you are setting a logo path for forms, the Eclipse Forms server must have access to the location where the logo file is stored. We recommend copying and storing the logo onto the appropriate server. |

3. Click **Save Page** to save your changes.

   The system uses the logos you set for any report or form it generates for jobs at that branch from the point when you change the logo going forward. It does not regenerate forms created prior to changing the logo.

**To delete a branch-specific logo:**

---

**Important:** If you delete a branch-specific logo, the system uses the logo defined for All branches for forms and reports at that branch. If there is not a logo defined for All branches, the system generates forms and reports without a logo.

---

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Document Imaging** tab.

2. In the **Logos** area, select the check box next to the branch-specific logos you want to remove and click **Delete Logo(s)**.

3. Click **Save Page** to save your changes.

# Setting Printer locations

The printers that you use for printing documents from Job Management must be accessible the Eclipse Forms server. To ensure that your server can communicate with your printers, print a document to that printer prior to adding it as a printer in Job Management.

**To set a printer location for Job Management:**

1. From any page in Job Management, click **Admin** in the menu bar to display the Job Management Administration page and select the **Document Imaging** tab.

   Job Management retrieves your Windows network printer information to populate the printer table with your defined printers.

2. Use the following instructions to change printer settings for Job Management:

| To... | Do this... |
|-------|-----------|
| change the default printer | Access the Windows Control Panel printer settings on your computer and change your default printer.<br>The default printer you assigned in Windows and its network path displays as the Default Job Management printer. |
| add a printer | 1. Click **Add Row** above the printer table to add a row to the table.<br><br>2. In the **Printer Name** field, enter a name that identifies the printer you are adding, such as Warehouse or Counter. The name you enter here is what displays in the My Profile page when you select your default Job Management printer.<br><br>3. In the **Printer Path** field, enter the path to the printer on your network (how the printer is accessed from the Eclipse Forms sever). The name you enter here must be the exact name of the printer as it is defined in the Windows Printers and Faxes settings. The printer either needs to be set up on the Eclipse Forms server with the name you enter here, or it has to be a path to a network shared printer. |
| delete a printer | 1. Select the check box next to the printer name that you want to delete.<br><br>2. Click **Remove Checked Rows**. |

# Setting Default Form Options

To help ensure that the correct options are selected for the documents you send to customers and vendors, such as request for quotes, purchase orders, and change orders, you can set the default selections that apply to each form.

**To set default form options:**

1.  From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Form Settings** tab.

2.  In the **Form Options Defaults** section, select the default options for each form type.

| Form Type | Option | Description |
|---|---|---|
| Request Quote | **Print Style** | Select whether to send the bid based on the pricing information on the bill of materials (BOM), or to send the bid with all line items lot priced, regardless if unit pricing is select in the BOM for any item. The default setting is **Bid as Vendor Quoted**. |
| | **Hide Components** | Select **Yes** to create bids without components listed, with the price of the components rolled into the parent product's pricing. The default setting is **No**. |
| | **Rollup Components** | Select **Yes** to create bids with the price of the component's rolled into the parent product's pricing. The default setting is **Yes**. |
| | **Hide extended pricing** | Select **Yes** to create bids without the extended pricing information. The default setting is **No**. |
| | **Hide Vendor** | Select **Yes** to create bids without the vendor information listed. The default setting is **No**. |
| | **Display shipping instructions** | Select where on the bid you want the shipping instructions to display. The default setting is **Before line items**. |
| Quotation | **Only send items assigned to the vendor** | Select **Yes** to create quotes that include only line items on the BOM that have a vendor's name in the **Vendor** column. The default setting is **No**. |
| | **Exclude stock line items** | Select **Yes** to create quotes that without items that you have indicated on the BOM that you carry in stock. The default setting is **No**. |
| | **Display vendor instructions** | Select where on the request for quote you want the vendor instructions to display. The default setting is **Before line items**. |

| Form Type | Option | Description |
|---|---|---|
| Submittal | **Submittal Mode** | Select whether to create submittals for customer approval or for their record. The default setting is **For Approval**. |
| | **Hide Components** | Select **Yes** to create submittals without components listed. The default setting is **No**. |
| Reserve PO | **Show Line Items** | Select **No** to create a reserve purchase order without listing the line items on the BOM for the vendor. The default setting is **Yes**. |
| | **Show Cost** | Select **No** to create a reserve purchase order without the cost information for the line items on the BOM for the vendor. The default setting is **Yes**. |
| Hold for Release | **Display vendor instructions** | Select where on the hold for release purchase order you want the vendor instructions to display. The default setting is **Before line items**. |
| Release PO | **Show Cost** | Select **No** to create a release purchase order without the cost information for the line items on the BOM for the vendor. The default setting is **Yes**. |
| | **Display vendor instructions** | Select where on the release purchase order you want the vendor instructions to display. The default setting is **Before line items**. |
| Customer Change Order | **What line items should display** | Select which line items you want to include on the customer change order. The default setting is **All Items**. |
| | **Display shipping instructions** | Select where on the change order you want the shipping instructions to display. The default setting is **Before line items**. |
| Vendor Change Order | **Use** | Select whether you want to create vendor change orders with the original purchase order number or a new number. The default setting is **Original P/O**. |
| | **Immediately release material** | Select **Yes** to create change orders that allow the vendor to release the material on the change order when they receive the change. The default setting is **No**. |
| | **What line items should display** | Select which line items you want to include on the customer change order. The default setting is **All Items**. |
| | **Display vendor instructions** | Select where on the change order you want the vendor instructions to display. The default setting is **Before line items**. |

When you are generating each form throughout the completion of the job, you have the option to change the defaults per form.

3.  Click **Save Page** to save your settings, or click **Reset to Factory Defaults** to restore the settings back to the original settings that came with Job Management.

# Defining Notes for Form Footers

Prior to printing documents for your jobs, set up any notes specific to each form type that you want to display in the footer. For example, you might have a standard message that you want to display on the bottom of all your purchase orders.

We recommend that you test your forms prior to printing them for a job to determine how much text fits in the space provided.

**To define note settings for your forms:**

1. From any page in Job Management, click **Admin** in the footer to display the Job Management Administration page and select the **Form Settings** tab.

2. In the **Note** field, enter the notes that you want to display on a form.

   Enter the line breaks as you want them to display in the notes box at the bottom of the form.

3. In the **Form** field, select the form on which you want the note to display.

   If you want the same notes to display on multiple forms, copy and paste the text into a new Note line and select the form in the **Form** field.

4. Click **Save Page** to save your notes and form assignments.

**More Options When Defining Notes for Form Footers**

You can also do the following when defining notes for your form footers:

| To... | Do this... |
|---|---|
| add a note line | click the **Add Form Note** link at the top of the table. The system adds a line for additional notes at the bottom of the table. |
| delete a note line | click the remove line  item next the item that you want to remove. |

**See Also:**

Job Management Setup Overview

# Navigation Basics

Job Management has several features that allow you to quickly navigate through the application and identify fields that require data, or fields that are validated against Eclipse data. Pages in each job phase, such as bidding or releasing material, display only relevant information to that phase, so you can efficiently carry out tasks related to the current needs of the job.

The help available icon ⊕ identifies fields, tabs, or pages that provide on-line help.

## Field Types

Job Management contains the following field types:

| Field Type | Description and Example | Icon |
|---|---|---|
| Required | Fields that require an entry have a **bold** field name or an asterisk (*). | |
| Validated search | Fields that the system validates against Eclipse data, or settings within Eclipse Job Management are indicated with a spinner icon.<br><br>The system searches based on the characters you enter in the field, and begins searching after you enter the third character in the field. As you continue to type, the system refines the search based on the additional characters entered. While the spinner is moving, the search is active. After the spinner stops, the system displays the first 25 results that match the characters entered in the field.<br><br>Click an item in the result list to select it, or enter additional characters in the field to further refine the list.<br><br>If you are searching for Eclipse users, you can search using the users name or system user ID. | ✳ |
| Free-form text | Fields that have no restrictions on characters or entries. The **Job Name** field, below, is an example of a field where you enter each character of text. Free-entry text fields have no icons associated with them. The field displayed below the **Job Name** field is a view-only field with no box around it, which indicates it is a view-only field.<br><br>Job Name: Tuesday 50103<br>BILLINGS, MT<br><br>**Note:** For e-mail fields, you can enter multiple e-mail addresses separated by commas. | |
| Date entry | Fields that require a calendar date in the MM/DD/YYYY format. Enter the date in the field or click the calendar icon to the right of a date field to use the calendar to select a date. The **Follow up Date** field, below, shows a date entered, and the **Completion Date** field, below, shows a field that needs a date.<br><br>Follow up Date: 05/18/2007<br>Completion Date: MM/DD/YYYY | 🗓 |

| Field Type | Description and Example | Icon |
|---|---|---|
| Drop-down fields | Fields that provide a list of options from which to select. The **Job Status** field, below, on the Job Summary page is an example of a drop-down field. Click the down arrow in the field to select from the valid choices for this field.<br><br>Job Status<br>Awarded<br>Bidding<br>Invoiced<br>Job Management<br>Released | |
| Triggered search | Fields that search for a match in Eclipse or throughout Job Management. Triggered search fields are similar to validated search fields in that they search on the characters entered in the field. The **Description** column, below, on the bill of materials is an example of a triggered search field. You can enter free-entry text in this type of field or use the image icon to start a catalog search of Eclipse. When the system finds a match and you select a product for the field, the icon changes to indicate the product is from your inventory.<br><br>**Description**<br><br>AA<br><br>SYL F40CW 48-IN RS/F | |

## Saving Information

When creating and updating job information in Job Management, we recommend that you save your work when you first display a page and before you exit a page. If you use the **Back** button or navigate away from a page, the application automatically saves your work on that page. Pages also automatically save every five minutes. The application times out after one hour of inactivity.

To exit a page without saving the information you entered on that page, click **Cancel**.

> **Note:** The Maintenance page saves information as you do your work and immediately updates the application. Therefore, this page does not have a Save button.

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**See Also:**

Eclipse Job Management Overview

Logging On and Off of Job Management

# Viewing Jobs

Job Management provides easy access to your active jobs and jobs with recent activity so that you can quickly find what you need to proceed with the job's progress and determine the percent complete for a job. Use the **Jobs** section of the Job Management Home page to quickly view a status of any job to which you are associated, such as jobs you created, or jobs to which you are assigned a role, such as quoter or project manager. You can also view all jobs in the system regardless of whether you have an associated role with the job.

**To view a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. In the **Jobs** section of the Job Management Home page, select one of the following tabs in the activity table to display jobs for which you are authorized:

   - **My Jobs** - Displays all jobs with an active status to which you are associated. Jobs are listed in chronological order by bid due date with the earliest date at the top of the list. This list does not include jobs that have been marked as lost or completed jobs.

   - **Recent Activity** - Displays the last 25 jobs that you have recently accessed, regardless of the date you viewed them. Jobs are listed in chronological order by the last date you accessed the job.

   - **All Jobs** - Displays all active jobs, regardless of whether you have an associated role in that job. This data displays groups of up to 50 jobs at one time in chronological order by most relevant date with the most recent date at the top.

3. In the **Job Name ID** column, select the job name to display that job's Job Summary page.

   **Note:** You can edit only jobs for which you have authorization or an associated role.

   You can also filter the My Jobs, Recent Activity, and All Jobs lists by entering search criteria, such as job name or a quoter's name in the column headings. The system filters the jobs to display only those that match your search criteria.

# Viewing Job Deadlines

From the Job Management Home page, you have immediate access to a table of user-specific data displaying the next five days of jobs and their most significant deadline dates, either follow-up date or bid date and time, as well as task due dates.

For example, you have three jobs with deadlines on September 14, 2007. The My Upcoming Deadlines table displays three jobs under FRI 9/14/2007. The first job listed has a bid due at 2:00 PM on that date, so for that job, the table displays: Bid Due @ 2:00 PM.

**To view a job deadline:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

   **Note:** If your Home page is set to **Receiving**, the **Create Job** section is not available to you. Update your profile to use the Default Home page or the Create Job Home page.

2. Navigate to the **My Upcoming Deadlines** section of the page.

   If you have past-due follow-up dates, the following message displays: "You have overdue follow ups/bids."

   Click **Overdue followups/bids** to see a list of your overdue dates.

   The example below displays all deadlines within the next two days: two follow-up calls are due today (3/16/2007), and one deadline is due tomorrow.



3. To display deadlines for dates later than today and tomorrow, click the arrow icon ▶ next to the date you want to view. When the arrow points down, as shown below, the deadlines for that day display.

4.  To display the Job Summary page for any job listed, click the job name in the
    **Description** column.

    To display all active jobs, in the Activity table on the Job Management Home page, click
    the **All Jobs** tab.

---

**See Also:**

Viewing Jobs

Completing Job Details

# Searching for Jobs

The search function lets you quickly search for a job by name, or you can use the advanced search to search by date and/or entity. Narrow the search by entering multiple values in the advanced search fields.

> **Note:** The search results only include those jobs at branches to which you have authorization. If you are assigned to a job, but you are not authorized for the job's branch, you see the job in your jobs list, but you are not able to open the job.

You can search for a job using the Search function available in the main menu, or in the **My Jobs**, **Recent Activity**, and **All Jobs** tabs on the home page by typing all or a portion of the job name in the **Job Name ID** field to filter the list of jobs.

**To search for a job by name or status:**

1. From any page in Job management, click **Search** in the menu bar to display the search prompt.

2. In the **Job Name/ID#** field, enter the job name, the first few letters of the job name, or the job ID, and click **Search**.

   The **Search Again** page displays with a table displaying any search results.

3. If the search results display the job you want, click the job in the **Job Name** field to display the Job Summary page for that job.

   If the search results do not display the job you want to view, do one of the following:

   - Enter a new search string to redefine the search criteria in the **Search Again** field and click **Search**.

   - Click **Advanced Search** to narrow your search by completing the following fields, as needed. The less specific you are in your search criteria, the more results the system returns.

     | Field | Description |
     |-------|-------------|
     | **Job Name/ID#** | Enter a job name or ID number. |
     | **Customer** | Enter a customer name listed on a job, whether awarded or not. |
     | **City** | Enter the name of the city where the job is located. |
     | **State** | Enter the name of the state where the job is located. |
     | **Vendor** | Enter a vendor listed on a job. |
     | **Quoter** | Enter the quoter's name. |
     | **Project Manager** | Enter the project manager's name. |
     | **Next Action By** | Enter the name of the person responsible for taking the next action on the job. |

| Field | Description |
|-------|-------------|
| **Inside Salesperson** or **Outside Salesperson** | Enter the salesperson's name. |
| **Status** | Select a job status from the drop-down menu to search on a job's status. |
| **Job Lost Reason** | Select the reason a job was lost from the drop-down menu to include jobs that were tagged as lost for that reason. |
| **Include Inactive Jobs** | Select **Yes** to include jobs with job statuses that were tagged as inactive in the **Job Status** area on the Administration page. |
| **Include No Bid Jobs** | Select **Yes** to include jobs that were lost due to no bidding. |
| **Sales Order/Invoice #** | Enter at least four characters from a direct sales order or invoice included in a job to search for the job that contain orders and invoices with that number. |
| **Price Branches and Territories** and **Ship From Branches and Territories** | Select the branches and territories to search for only jobs assigned to those branches. |

4. Click **Search** to display the jobs that meet the criteria you entered.

   To delete the entries in all fields and start a new search, click **Clear**.

**To search for a job by date or time:**

1. From any page in Job management, click **Search** in the menu bar to display the search prompt.

2. In any of the date or time fields, select the criteria from the drop-down list to searching for a specific date or bid time or a range of dates or times.

   For example, to search for a job whose bid date is before October 1, 2009, select **Is earlier than** and then enter 10/01/2009 in the next field.

3. In the next field, do one of the following:

   - To search by date, enter the bid or follow-up date in mm/dd/yyyy format or click the calendar icon and select the date to include in the search.

   - To search by time, enter the time of day in hh:mm AM/PM format to include the bid time in the search.

4. When you have completed entering the criteria for your search, click **Search**.

   To delete the entries in all fields and start a new search, click **Clear**.

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**See Also:**

Navigation Basics

Viewing Job Deadlines

Viewing Jobs

# Creating Job-Level Notes

As you are working with a job in Job Management, you can create job-level notes that are viewable by any user from any main page of the job. For example, you might create notes regarding phone calls to customers or vendors.

Notes are added to a table and viewed much like a log. You can view your notes and notes made by other users, however, you cannot edit or delete previous notes.

**To create a job-level note without a follow-up task:**

1.  From any major page for a job in Job Management, such as the Job Summary page or the Receive Material page, click the add note icon next to the word **Notes** at the top of the page.

2.  Enter the notes you want to add to the job and click **Add**.

**To create a job-level note with a follow-up task:**

1.  From any major page for a job in Job Management, such as the Job Summary page or the Receive Material page, click the add note icon next to the word **Notes** at the top of the page.

2.  Enter the notes you want to add to the job and select **Create Follow-up**.

3.  Enter the following information about the task and click **Add**.

| Field | Description |
|---|---|
| **Subject** | The general purpose or a shortened description of the task. The subject you enter here displays in the Task Manager and helps you identify the task. |
| **User** | The ID system user responsible for completing the task. |
| **Priority** | The priority of the task. Select **1**, **2**, or **3** to indicate the importance of the task. If you have multiple tasks due on the same day, setting a priority helps you determine in which order to complete the tasks. |
| **Status** | The stage the task is in. Select **Not Started**, **In Progress**, or **Completed** to indicate the task's stage. |
| **Due Date** | The calendar date by which the task needs to be completed. Click the calendar icon and select the due date. |
| **Reminder** | The date, if any, on which you want the system to remind you of the task. Select the **Reminder** check box, click the calendar icon and select the reminder date. |
| **Reminder Method** | If you selected to send a reminder regarding the task, select whether to receive a reminder by e-mail or by text number and enter the corresponding e-mail address or telephone number. If you send reminders through text messages, the recipients standard text messaging charges apply. |

The system adds the task and any reminders to the Task Manager.

**To view job-level notes:**

1.  From any major page for a job in Job Management, such as the Job Summary page or the Receive Material page, click **Notes** at the top of the page.

    The notes for the job display in a pop-up window, including the ID of the user who entered the note, the data and time the note was created, and the note text.

2.  Click outside the Notes pop-up window to close the window.

---

**See Also:**

Creating Item-Level Notes

# Creating, Editing, and Deleting Bill of Material Item-Level Notes

As you are working with items for a job, such as on the bill of materials (BOM) or when creating purchase orders, you can add notes to each individual item. For example, you might create notes regarding pricing for items or notes documenting conversations you have had with vendors regarding item pricing and rebates. Notes that you add to a item when creating purchase orders display with the item on the actual purchase order document.

**To add a note to a line item in the BOM:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the BOM or that job.

3. Select the items to which you want to add a note using the check box to the left of each line item.

   The system adds the same note to all the selected line items.

4. In the Bill of Materials table header, click the notes icon  and enter the notes you want to add to the item and select on which documents you want the note to display.

5. Click **Add** to add the note to the selected items.

**To view and edit a note attached to a line item in the BOM:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the BOM or that job.

3. Click the notes icon  in the last column of the line item to display all the notes entered for that item.

4. Update the note and the forms on which is displays, as necessary.

5. Click the save icon  to save your changes.

**To delete a note attached to a line item in the BOM:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the BOM or that job.

3. Click the notes icon  in the last column of the line item to display all the notes entered for that item.

4. Click the delete icon  to remove the note from the line item.

# Creating Item-Level Notes in Purchase Orders

As you are working with items for a job when n creating purchase orders, you can add notes to each individual item. For example, you might create notes regarding pricing for items or notes documenting conversations you have had with vendors regarding item pricing and rebates. Notes that you add to a item when creating purchase orders display with the item on the actual purchase order document.

**To add a note to a line item when creating purchase orders:**

> **Note:** The notes you add to line items in the Manage POs and Releases page display with the item on the direct sales order and the purchase order.

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Manage POs** to display the Manage POs and Releases page.

3. At the end of the line item to which you want to add a note, click the notes icon and enter the notes you want to add.

   Hold the mouse cursor over the notes icon to view any existing notes.

---

**See Also:**

Creating, Editing, and Deleting Item-Level Notes

Creating Job-Level Notes

# Creating Jobs

The application tracks your job activities so that you can easily determine how much remains to be done on the job.

When you create a job, the application generates a job number specific to the job type and the bid date for the job, for example Li-052107-056. The first digit is 0 (zero) until you assign a job type, at which time the first digit changes to the letters representing a job type, such as *Li* for lighting or *Ge* for gear. The bid date displays after the job type in the format MMDDYY. The system issues the remaining numbers sequentially.

You must be assigned the JOB.MGMT.CREATE.JOB authorization key to create jobs.

**To create a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. In the **Create Job** section of the Job Management Home page, complete the following fields, as needed.

   Entering as much information about the job as you can helps you identify the job in the application.

| Field | Description |
| --- | --- |
| **Job Name** | Enter a name that describes the job, such as the building name. |
| **City** | City where the job is located. Entering a city is helpful if you have jobs with the same name but that are located in different cities or towns. |
| **State** | State where the job is located. Entering a state is helpful if you have jobs with the same name but are located in different states. |
| **Job Type** | Select the type of product sold for the job, such as lighting. This list is populated from the job types you defined on the Administration page. |
| **Price Branch** | (Required) Select the branch that receives credit for the orders on this job. You can only select from branches for which you are authorized. This field defaults to the setting in your profile. |
| **Ship Branch** | (Required) Select the distributing branch that handles the shipping for the job. You can only select from branches for which you are authorized. You can ship stock from any branch using standard Eclipse inter-branch functionality, after the purchase orders for the job are created This field defaults to the setting in your profile. |
| **Bid Due Date** | (Required) Enter the date to present your bid to the customer in mm/dd/yyyy format. |
| **Bid Time** | Enter the time of day to present the bid to the customer in hh:mm AM/PM format. For example, if the bid for a job is due by noon, enter 12:00 PM. |
| **Follow up Date** | Enter the next date to review the job in mm/dd/yyyy format. See the **My Upcoming Deadlines** section on the Job Management Home Page to view significant dates and deadlines for your jobs. Monitoring this date helps you to avoid problems and prevent lost sales. |

| Field | Description |
|---|---|
| **Customer** | Enter the bill-to customer ordering product for the job. |
| | You can add multiple customers to the job during the initial creation. Enter the name of the customer in the **Customer** field and click **Add**. |
| | **Note:** The system compares your accessible branches and the customers accessible branches. If you and the customer have branches in common, then you can add the customer to the job. Define user accessible branches in User Maintenance in Eclipse and customer accessible branches in Customer Maintenance in Eclipse. |
| | When you create the bill of materials, if there is more than one customer on the job, the system uses the pricing from the default customer defined in the **Job Management Administrator Settings** control maintenance record. |
| **Quoter** | Enter the name of the person responsible for defining how much to charge the customer for the job. You can only select a user that is authorized for the current price branch for the job. |

Required fields display in **Bold**.

> **Note:** If your Home page is set to **Receiving**, the **Create Job** section is not available to you. Update your user profile to use the Default Home page or the Create Job Home page.

3. Do one of the following:

- Click **Create Job** to display the Job Summary page where you can enter the details for the job such as project managers, approval requirements, bill of materials, and vendor pricing. The Job Summary header fields provide additional information to better identify the job.

- Click **Create Multiple Jobs** to repeat creating jobs by entering only general information before entering details for each job. Creating multiple jobs at once is helpful when you first start migrating job information to Job Management, or if you have a backlog of job information to enter into the system, and is a way to create an initial record for each job without entering the details for each job. You can come back and fill in the details at a later time.

# Completing Job Details

After you create a new job, enter the initial customer, and create the bill of materials (BOM) for the job, you can begin the bid process with customers and vendors. With Job Management you can track jobs from the initial bid request through the billing process for direct orders as well as stock orders. Job Management also tracks returns and credits as the job progresses.

This page describes how to add the following information for a job:

- General, such as dates and job status
- Customers bidding the job
- Vendors providing material for the job
- Representatives you are working with on the job

To view or update general, customer, vendor and representative information available for a job after awarding the job to a customer, click **Job Summary** from any page within a job, and click the **Info/Settings** tab.

**To enter general information for a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. Create a job or view an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. If you are creating a new job, click **Save** to ensure that your job data is saved.

   The fields that you completed when creating this job display in the **General Information** section.

4. Complete the additional fields or edit information in the **General Information** section, as needed.

| Field | Description |
|---|---|
| **Rebid Date** | Enter the date the job is rebid. For example, if you have a large project, you might create a bid prior to the finish of the design. Because the status of the design is unknown, you bid the job as normal. At a later date, you might need to change the bid you submitted for  the job when the final design is complete. |
| **Follow-up Date** | Enter the next date to review the job in mm/dd/yyyy format. View **My Upcoming Deadlines** on the Job Management Home Page to view significant dates and deadlines in chronological order for your jobs.<br>Monitoring this date helps you to avoid problems and prevent lost sales. |

| Field | Description |
|-------|-------------|
| **Completion Date** | Enter the date the customer expects to finish the job or project in mm/dd/yyyy format.<br>Use this date as a selection criterion for reviewing or reporting on orders. You can update this date as needed. |
| **Price Branch** | (Required) Select the branch that receives credit for the orders on this job. You can only select from branches for which you are authorized.<br>If you award a job to a customer who has a pricing branch override defined in Customer Maintenance, the branches assigned to the job respect the override settings, and this field is view-only. |
| **Ship From Branch** | (Required) Select the distributing branch that handles the shipping for the job. You can only select from branches for which you are authorized. You can ship stock from any branch using standard Eclipse inter-branch functionality, after the purchase orders for the job are created.<br>If you award a job to a customer who has a shipping branch override defined in Customer Maintenance, the branches assigned to the job respect the override settings, and this field is view-only. |
| **Job Status** | Select a status from the drop-down list that identifies the stage of the job, such as Bidding. If the job currently does not have a status, leave this field blank, or use the **No Bid** and **Lost Job** check boxes to indicate that you did not bid for the job, or lost the job. This list is populated with the job statuses defined on the Administration page. |
| **Personnel Fields** | Enter the quoter, project manager, architect, engineer, and any other people you want to include in the job summary information in the corresponding fields.<br>You can only select users for these roles that are authorized for the current price branch for the job.<br><br>**Note:** The project manager becomes the order writer when you manage purchase orders for the job. |
| **Win Confidence** | Select how confident you feel that you will win this job. This list is populated from the job win confidence values defined on the Administration page. The win confidence value you select s included in the Open Bid List Report. |
| **Job Type** | Select the type of product sold for the job, such as lighting. This list is populated from the job types defined on the Administration page. The job type you entered with creating the job displays in this field. |
| **Project Type** | Select the type of project the job is fulfilling, such as a Government job or a Commercial job. This list is populated from the project types defined on the Administration page. Use project types to help further classify the jobs you bid on and award. |
| **Have Take Off** | Select **Yes** if you have received the contractor's quantities from their assessment of the project's design blueprint, otherwise, select **No**. The default is **No**.<br>The blueprint take off is a list of products for a job that can include type, manufacturer, catalog number, quantity, voltage, ballast, and lamp information. At some stages of the job design phase, you might not have this detailed information for the items required for the job. |

| Field | Description |
|---|---|
| **Approval Required** | Select **Yes** as a reminder that customer approval is required for the submittal package. When a job has been awarded to a customer, you send the customer a submittal package that contains the name of everyone involved in the job, an item schedule without pricing, and the manufacturers tear sheets for each item on the schedule. |
| **No Bid** | Select this option if you never bid the job. |

5.  Click **Save** to save your changes to the general information for the job.

6.  Continue to the **Customer** area to enter customer information for the job.

**To enter customers for a job:**

1.  From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2.  Create a job or view an existing job to display the Job Summary page.

    You can edit only jobs for which you have authorization or an associated role.

3.  Complete the fields in the **Customer** Information section as needed to identify the customers that are bidding on the job.

| Field | Description |
|---|---|
| **Customers For This Job** | Displays the customers used to create the job. Do the following, as needed:<br>• To add a customer, search for a customer by entering the customer name in the **Search for New Customer** field. Select the customer from the search results list and click **Add Customer**. The customer name displays in the Customers For This Joblist.<br><br>The system compares your accessible branches and the customers accessible branches. If you and the customer have branches in common, then you can add the customer to the job. Define user accessible branches in User Maintenance in Eclipse and customer accessible branches in Customer Maintenance in Eclipse.<br>• To delete a customer from the job, select the customer to delete, and then click **Delete Selected Customer**.<br>The customers you select here are used for all orders created for the job. |
| **Customer Information** | (View Only) The address and phone number for the customer selected in the **Customers For This Job** field. The system populates this information based on the information in Customer Maintenance for the customer.<br>If you have not completed any receiving for the job and need to update the address to which you are shipping material, click **Override Default Ship To Address** in the Ship To field and enter the new address information. |
| **Inside Salesperson** | (View Only) Name of the customer's inside salesperson from the Eclipse customer record. |
| **Outside Salesperson** | (View Only) Name of the customer's outside salesperson from the Eclipse customer record. |

| Field | Description |
|---|---|
| **Main Contact Information** | Select the main contact person at the selected customer. The contact's information as defined in Eclipse displays.<br><br>After you award the job, enter main contacts and alternate contacts in the Site Contact section of the **Info/Settings** tab of the Job Summary page. |
| **Preferred Contact Method** | Enter the best way to contact the person, such as Main Phone Number or E-mail. |

4. Click **Save** to save your changes to the customer information for the job.

5. Do one of the following:

   - Continue to the **Vendor** section to enter vendor information for the job.

   - Send bids to the customers selected in the **Customers For This Job** field. You need to define the bill of materials prior to sending bids to customers.

   - Indicate to which customer the general contractor awarded this job. After the job is awarded, the Job Summary page displays relevant information and options pertaining to the selected customer.

**To enter vendor information for a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. Create a job or view an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. Complete the fields in the **Vendors** section as needed to identify the vendors you are using on the job.

| Field | Description |
|---|---|
| **Vendors For This Job** | Displays the vendors available for the job. The initial vendor list is generated by the default vendors set to display for all jobs on the Job Management Maintenance page. Do the following, as needed:<br>• To add a vendor, enter the name of the vendor in the **Add a Vendor** field, and click **Add Vendor**.The vendor name displays in the Vendors For This Joblist. Vendors must have an Eclipse vendor record to enter them in this field.<br>• To delete a vendor from the job, select the vendor to delete and click **Delete Vendor**. |
| **Vendor Information** | (View Only) The address and phone number for the vendor selected in the **Vendors For This Job** field. The system populates this information based on the information in Vendor Maintenance for the vendor. |
| **Quote Number** | The vendor's quote number that comes back on any paperwork from the vendor. This number is included in the Vendor Instructions section of the reserve, hold for release, and release purchase orders you create and send to the vendor. |

4. Click **Save** to save your changes to the vendor information for the job.

**To add a representative to a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. Create a job or view an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. Complete the fields in the **Job Reps** section as needed to identify the manufacturer reps you are using on the job.

| Field | Description |
|---|---|
| **Reps For This Job** | Displays the representatives for the job. The initial rep list is generated by the default reps set to display for all jobs on the Job Management Maintenance page. Do the following, as needed:<br>• To add a rep, enter the name of the rep in the **Add a Rep** field, and click **Add Rep**. The rep name displays in the Reps For This Joblist. Representatives must be assigned to the vendor on the Job Management Maintenance page before you can add them here.<br>• To delete a rep from the job, select the rep to delete, and click **Delete Rep**. |
| **Rep Information** | (View Only) The address and phone number for the rep selected in the **Reps For This Job** field. |

4. Click **Save** to save your changes to the representatives information.

# Sending Requests for Quotes to Vendors

Send requests for quotes (RFQ) and bids from the application to ensure that you waste no time defining prices for a job. The application lets you generate RFQs and bids by e-mail, fax, or printed document.

First, create the job and enter the customers and vendors for the job. Next, enter the information for the job on the bill of materials (BOM). Generate an RFQ to send to vendors on this job, and when they send their pricing information back to you, enter that information on the Vendor Pricing page, where you can compare pricing information and decide which vendors to use for the job. You can import the vendor pricing information from the comparison page directly to the BOM.

**To send an RFQ to a vendor:**

1. Create the BOM for the job.

2. From the Job Summary page, click **Send RFQs** in the Cost Quotes section to display the Request Vendor Pricing page.

3. In the **Bill Of Material** field, select the bill of material you want to include in the request for quote.

4. Select one or both of the following check boxes to select the items you want to include in the request for quote:

    - **Only send items that have the specific vendor assigned to item -** Includes only line items on the BOM that have a vendor's name in the **Vendor** column.

    - **Exclude stock line items** - Creates the request for quote without items that you have indicated on the BOM that you carry in stock.

5. In the **Branch** field, select the pricing branch associated with the job.

6. In the **Printer** field, select the printer location to use for printing the vendor cost documents. Printers are defined in the **Forms Generation** area of the Administration page.

7. Complete the e-mail or fax header sender fields as follows:

    - **From** - Enter your e-mail address, your fax number, or your name. This field populates with your e-mail address from User Maintenance, if one is defined.

    - **Email CC** - Enter another recipient's name to have a copy of the message sent to that recipient. The CC recipient's name displays in the **To** field on the sent e-mail message.

    - **Subject** - Enter the subject of the e-mail or fax. For reference purposes, you may want to include information that helps you retrieve the message later, if necessary, such as RFQ-2/10/2008 - 8AM.

8. In the **Message** field, enter the body of the e-mail or the fax cover sheet to include with the quote.

9. If there are any special instructions you want to print to the vendor on the Request for Quote form, enter those notes in the **Vendor Instructions** field. You can also click the search icon 🔍 to select from a list of vendor instructions defined in Eclipse.

   Vendor notes display in the body of the form prior to the items from the bill or material.

10. In the **Send To** area, select the vendors from which you are requesting quotes.

11. In the **Via** area for each vendor selected, select the method or methods of sending the information you entered in the BOM:

    - **Email** - E-mails the document to the vendor in this row. Enter the vendor's e-mail in the field. The system validates e-mail addresses are validated against the information in the Eclipse vendor record for the vendor.

    - **Fax** - Faxes the document to the vendor in this row. Enter the vendor's fax number. The system validates the fax numbers against the information in the Eclipse vendor record for the vendor.

    - **Print** - Prints the document at the default printer entered on the Administration page so you can mail the documents to the vendors, as needed.

    Click the **Preview** link to view how the request for quote looks prior to sending it.

12. Click **Send to Checked Vendors** to send the RFQ using the method selected for each vendor.

    When you receive the vendor quotes, enter the quoted information in the cost comparison table in the Vendor Pricing page.

    **Note:** Click **Job Summary** and then the **Job Documents** tab to view the RFQs and other documents generated for the job.

# Comparing Vendor Pricing

When you receive quotes from vendors, you can use the Vendor Pricing page to enter and compare the quoted information Use the optional Vendor Pricing page as a worksheet to compare prices before selecting a final vendor for the item. You can also add more item types, as needed, that will be added to the bill of materials (BOM). Completing this worksheet is not required to create a BOM. However, you can import pricing and vendor information into the BOM directly from the worksheet.

> **Note:** Adding a line item in the vendor pricing page also adds it to the BOM when you click **Save**.

## Comparing Vendor Prices Side-by-Side

Use the side-by-side comparison to help determine which vendor to select for items on the BOM.

> **Note:** To update the cost for stock products when doing a side-by-side comparison, you must be assigned the JOB.MGMT.EDIT.STK.COST authorization key.

**To compare vendor pricing:**

1. Create the Bill of Materials and send requests for quotes to vendors associated with the job.

2. After you receive vendor quotes, click **Vendor Pricing** from any page in the job to display the Vendor Pricing page.

3. In the **Select Vendors** area, do one of the following:

   - In the **Available Vendors** list, click and drag the vendor that you want to display in the vendor comparison table to the **Selected Vendors** list. Repeat this step for each vendor you want to compare. The system adds fields to the comparison table at the bottom of the page for each vendor that you add. The system displays only those vendors that are authorized for the current price branch for the job.

   - Click **Show All** to add all vendors into the vendor comparison table.

   To remove a vendor from the comparison table, click and drag the vendor from the **Selected Vendors** list to the **Available Vendors** list. Click **Reset** in the Selected Vendors list to remove all vendors.

4. For each vendor and item on the BOM, do the following:

   - Specify whether the item is lot or unit priced, if it is different than how you entered it on the BOM.

   - Enter the vendor prices received from your requests for quotes. The system calculates the extended cost for the items and the total cost for the items from the vendor. Click the recalculate icon ⟳ at the bottom of each vendor's information to update the **Vendor Total Cost** field as you make updates.

5. Click **Save** to save your changes.

## Applying Vendor Pricing to the BOM

After you have pricing set in the worksheet, you can transfer the selected vendors and pricing information to the BOM for the job.

**To apply vendor pricing to the BOM:**

1.  When you determine which vendors to use for each item, in the **Final Vendor** field for each item, select the vendor that will supply that item.

    The **Final Vendor** field contains only the vendors you used to compare vendor pricing, and only vendors for which you have not created a purchase order.

    Only items with a vendor selected in this field are updated in the BOM. If the **Final Vendor** field is blank for an item, the system does not update that item in the BOM.

    **Important:** The vendor in the Final Vendor field overrides any vendor settings in the BOM.

2.  Click **Save** to save your changes.

3.  Click **Bill of Materials** to display the Bill of Materials page.

    The selected vendors from the Vendor Pricing page display in the **Vendor** field for the items you selected final vendors for on the Vendor Pricing page.

4.  Select **More Actions > Apply Vendor Cost** in the BOM header to populate the **Vendor** and the **Cost** field with the final vendors and vendor prices you entered on the Vendor Pricing page.

    **Note:** You can edit a vendor's items on a BOM until you create a Hold for Release purchase order or a Release purchase order for that vendor. After you create a purchase order for the vendor, use change orders to make any changes to that vendor's items on the BOM.

5.  Click **Save** to save the vendor costs in the BOM.

### More Options for Comparing Vendor Pricing

| To... | Do this... |
|---|---|
| recalculate total cost for a vendor on the Vendor Pricing page | click the refresh icon ⟳ next to the **Vendor Cost Total** field at the bottom of the table. |
| add a row to the bottom of the vendor comparison table | click **Add Row**. Complete the fields in the table, and save your changes. The new row displays on the BOM. |
| export the vendor pricing information to a spreadsheet | click **Export to Excel**, save the file in .xhtml format, and open it in Microsoft Excel. |

**See Also:**

Sending Requests for Quotes

# Sending Bids to Customers

Job Management provides a method to send bids directly to customers to ensure that you waste no time defining prices for a job. The application lets you generate and send bids using e-mail, fax, or by mailing printed documents.

You must be assigned the JOB.MGMT.BID authorization key to send bids to customers.

A bid request from a contractor typically contains a schedule, counts, and the project specifications. Each customer bidding on a might job send their own set of counts for a job. The bidders review each set of counts to determine a logical count and schedule to send to the vendors.

First, create a job and enter the information from the schedule and counts on the bill of materials (BOM). Use the information received from the contractor and vendors to start negotiating prices between your customers and vendors to arrange the best possible bid for your customer.

> **Note:** To define footer notes that display on all your bids, see Defining Notes for Form Footers.

Sending a bid to a customer requires that you define the following information:

- Bid format and bill of material
- Delivery information

**To set a bid's format and bill of material:**

1. Create the BOM for the job and enter the vendor pricing received from your RFQ documents.

2. Click **Job Summary** in the menu bar from any page on the job to display the general information for the job.

3. In the **Customers** area, click **Send Bids** to display the Send Bids page.

4. In the **Bill of Material** field, select the BOM on which you want to base the bid.

   For more information about creating multiple BOMs for a job, see Creating Multiple Bills of Materials for a Single Job.

5. In the **Print Style** field, select one of the following to determine how to bid the job:

   - **Bid as Vendor Quoted** - Sends the bid based on the pricing information on the BOM.

   - **Bid Entire Job as Lot** - Sends the bid with all line items lot priced, regardless if unit pricing was selected on the BOM for any item. The sum total of all items display at the bottom of the BOM table. The bid document does not contain a lot number.

6. Indicate how you want components to display on the bid.

| To... | Do this... |
|---|---|
| create the bid without the components listed, with the price of the components rolled into the parent product's pricing | Select **Yes** in the **Hide Components** field. This is the default. |
| create the bid with the components listed under their parent items with their component pricing. The parent item is listed with only its pricing. | Select **No** in both the **Hide Components** and **Rollup Components** fields. |
| create the bid with the components listed under their parent items without the component pricing added to the parent items pricing. If you select to roll up component pricing on the bid, any components that are part of a lot price are all rolled into the lot price printed on the bid. | Select **No** in the **Hide Components** field and **Yes** in the **Rollup Components** field. |

7. Indicate how you want the pricing and vendor to display on the bid.

| To... | Do this... |
|---|---|
| create the bid without the extended pricing information | Select **Yes** in the **Hide Extended Pricing** field. This field defaults to **No**, so the extended pricing information is included on the bid. |
| create the bid without the vendor listed | Select **Yes** in the **Hide Vendor** field. This field defaults to **No**, so the vendor information is included on the bid. |

8. Set the delivery information using the procedure below.

**To set a bid's delivery information:**

1. Set the bid's format.

2. In the **Branch** field, select the pricing branch for this job.

3. In the **Printer** field, select the printer where bid documents are printed, if you plan to print a copy of the bid documents.

   Define printer selections in the **Forms Generation** area of the Administration page.

4. Complete the following fields as necessary for the bid and how you plan to send it to your customers:

   - **From** - (Required for bids that you e-mail) Enter your e-mail address or name.

   - **E-mail CC** - (Optional for bids that you e-mail) Enter an e-mail address of anyone who you want to receive a copy of this document. This recipient's name is visible to other recipients of the e-mail.

   - **Subject** - (Optional for bids that you e-mail or fax) Enter a word or phrase that identifies the contents of the message. For example, you can include the word *Bid*,

and the job name and number. You may want to set a standard for the text you enter in this field, so your customers can always recognize the contents of the e-mail or fax.

- **Message** - Enter the text that you want to accompany the bid document either as the body of an e-mail or on the fax cover sheet.

- **Shipping Instructions** - Enter the text that you want to include in the body of the bid, prior to the line items on the BOM. To enter shipping instructions that you have defined in Eclipse, click the search icon 🔍 next to the field and select the instructions you want to include. To save the instructions that you enter for this job, click **Save as Default Shipping Instructions**.

5. Select the check boxes next to the customers that you want to receive the bid document, select one or more of the following send options, and enter the applicable information as described below:

- **Fax** - Select this option to send the bid by fax and enter the customer's fax number in the adjacent field. Click the search icon 🔍 next to the field to select from the customer's fax numbers as defined in the customer record in Eclipse.

  > If you have not awarded the job, the list includes fax numbers for the following:

  - The customer's bill-to record.

  - the customer's bill-to contacts.

    > If you have awarded the job, the list includes fax numbers for the following:

  - Ship-to customer record.

  - Ship-to customer contacts.

  - Awarded bill-to customer record.

  - Awarded bill-to customer contacts.

- **E-mail** - Select this option to send the bid to one or more e-mail address and enter the customer's email address in the adjacent field. You can enter multiple addresses, separated by commas. The system also sends the e-mail to any addresses in the **Email CC** field.

  Click the search icon 🔍 next to the field to select from the customer's e-mail addresses as defined in the customer record in Eclipse.

  If you have not awarded the job, the list includes e-mail addresses for the following:

  - The customer's bill-to record.

  - The customer's bill-to contacts.

  If you have awarded the job, the list includes e-mail addresses for the following:

  - Ship-to customer record.

  - Ship-to customer contacts.

- Awarded bill-to customer record.

- Awarded bill-to customer contacts.

  To attach additional documents to the e-mail, select the documents from the **Select documents to attach to e-mail** field. You can only attach documents that are attached to or have been generated for the job.

- **Print** - Select this option to print the bid document to the printer selected in step 3. Send the document to the customer by regular mail. Click the **Preview** link to view what the bid looks like prior to sending or printing it.

6. Click **Send to Checked Customers** to send the bid using the method selected for each customer.

   **Note:** Click the **Job Documents** tab to view documents associated with this job.

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**See Also:**

Viewing Documents Generated for Jobs

Resending Documents Generated for Jobs

# Deleting Jobs

You can delete unawarded jobs from Job Management. For example, you may have entered jobs that you either did not win or did not pursue that you want to remove from the views within the application.

**To delete a job:**

1. On the Job Management Home page, search for the job you want to delete.

2. On the Job Summary page, click **Delete**.

3. Enter a description for why you are deleting the job in the dialog box that displays and click **OK**.

# Marking Jobs as Lost

As you create jobs in Job Management, you can mark the jobs that you have lost without deleting them. Marking a job as lost flags the job in the system for reporting purposes. Use the Job Won/Lost Report to evaluate your win to loss ratio, as well as to determine the value and cost of the jobs that you might have lost.

You can also delete jobs from the system, however, deleted jobs are not included in reporting metrics.

**To mark a job as lost:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. View an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. Select the **Lost Job** check box and enter the reason that the job was lost, such as Canceled. Enter reason information for your records and for future reference when reviewing the job or reporting on lost jobs.

4. If you lost the job to a competitor, or want to indicate who your competitor was when bidding the job, select an entity in the **Competitor** field.

   The competitors available in this list are entered on the Maintenance page.

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**See Also:**

Deleting Jobs

Job Management Reports Overview

# Awarding Jobs Overview

After the bidding process for a job is complete and your customer is awarded the job, enter customer-specific information necessary for the job process, such as contact, shipping, and credit information. After you award the job in Job Management, use the Job Summary page to track and reference the overall status of the job, financial information for the job, job-related transactions, job settings, and all documents for the job.

After you award a job, you can still negotiate costs from your vendors and sell prices with the customer and modify the bill of materials (BOM) as necessary before generating purchase orders for the job.

You must be assigned the JOB.MGMT.AWARD.JOB authorization key to award jobs to customers.

For more information about awarding jobs, see the following topics:

- Awarding Jobs to Customers

- Viewing Job Statuses for Awarded Jobs

After you award a job, you can begin creating and managing purchase orders and review financial history for the job.

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**See Also:**

Managing Purchase Orders and Releases Overview

Change Orders Overview

# Awarding Jobs to Customers

After the bidding process is complete and your customer is awarded the job, enter customer-specific information necessary for the job process, such as contact, shipping, and credit information.

To update the customer information after awarding a job, click **Job Summary** from any page within a job and click the **Info/Settings** tab.

You must be assigned the JOB.MGMT.AWARD.JOB authorization key to award jobs to customers, and you must have an initial bill of materials created for the job. After you award the job, the pricing and cost information on the bill of materials reflects that of the customer to which you award the job. If you award a job to a customer who has a pricing or shipping branch override defined in Customer Maintenance, the branches assigned to the job respect the override settings.

> **Note:** You can only award jobs to bill-to customers who are not on credit hold.

**To award a job to a customer:**

1. On the Job Management Home page, search for the job you want to award.

2. From the Job Summary menu bar, click the **Job Summary** tab and navigate to the **Customers** area of the page.

3. In the **Award Job** field, select the customer to which you want to award the job and click **Award**.

   The customers from which you can select are the customers you originally added when you created the job. After you select a customer, the Award Job to Customer page displays, where you set contact, shipping, and credit information for the selected customer.

   **Note:** Customers that you award jobs to must be set up in Eclipse for order entry and must be assigned to the price branch for the job. If they are not authorized, the Award Job button is disabled.

4. Enter the customer's information on the Award Job to Customer page using the instructions below.

**To enter the customer's information for an awarded job:**

1. Award the job to the customer.

2. In the **Select Customer** field, verify that the correct customer name displays. Select a different customer, if necessary. This field is required.

   The customer you selected on the previous page displays in this field.

3. In the **Bill Of Materials** field, if you created multiple bills of materials for this job, select the bill of material to use. This field is required. You can change the bill of materials until you create your first purchase order for the job.

4. (Optional) In the **Select Main Contact** field, select the primary customer contact for this job.

   The contact selection list populates from the contacts associated with the Eclipse customer record in the system. If no contacts are defined for the customer, you cannot select a contact in this field.

   The contact information that displays here is not automatically updated if changes are made in Contact Maintenance in Eclipse. Click the **Refresh Contact Info** button to get the latest contact information from Eclipse.

5. Enter the shipping information for the customer.

| Field | Description |
|---|---|
| **Select Ship-To** | (Required) Select the customer to which to ship materials for this job. You can only select ship-to customers that are authorized for the current price branch for the job. |
| | The selected customer's ship-to and bill-to address information from the Eclipse customer record displays below the **Select Ship-To** field. To change the ship-to address for this job, enter the new address in the fields provided. Changes only impact orders moving forward. Updates are not made to past orders going to the ship-to customer. |
| | If you need to update the bill-to information for the customer, you can make edits to the **Bill-To** field available in the **Info/Settings** tab after you award the job. The system applies any changes you make to the bill-to address to existing jobs for the same bill-to customer. |
| | **Note:** The updates you make here are not saved to the Eclipse customer record. You can update the ship-to address for just this job without affecting the primary settings within Eclipse. |
| **Shipping Instructions** | Enter any additional shipping information necessary for the job. The shipping instructions set for the ship-to customer display in this field. |
| | To select from suggested shipping instructions that you have defined in Eclipse, click the search icon 🔍 next to the field. |
| | The information in this field displays when you create a hold-for-release purchase order, and on shipping tickets, depending on how your company forms are set up. |
| | Standard shipping instructions are defined in Eclipse (**System > System Files > Customer Vendor Control > Customer Vendor Standard Notes**). |

6. Complete the additional optional fields to provide as much information about the customer as possible.

| Field | Description |
|---|---|
| **Price Branch** | Select the branch that receives credit for the orders on this job. <br><br> If there is a price branch override set for the customer in the customer's record in Eclipse, the system populates the field with that branch. If there is no override specified in the customer's record, the system uses the price branch indicated in your Job Management Profile. If that is also blank, the system defaults to branch 1. |
| **Default Vendor Freight Terms** | Select the freight terms code to assign to the vendor. Freight terms indicate how a vendor expects freight to be paid for freight charges, such as Prepaid or Add On. For example, if a vendor expects the freight to be "Add On" then the purchase order's grand total would include any freight charges incurred. <br><br> **Note:** Freight terms codes are defined in the **Vendor Freight Terms Maintenance** control maintenance record. |
| **Freight In Exempt?** | Select **Yes** to exempt the customer from incoming freight charges, otherwise leave this field set to **No**. <br><br> This value defaults to the setting in the customer's Eclipse record in Customer Maintenance. However, you can update it here if necessary. |
| **Customer PO #** | (Required) Enter the purchase order from the customer, if the customer requires one. You can use the customer purchase order number to search for the order within the system. |
| **Tax Exempt ID#** | If the customer is tax exempt, enter the tax exempt number for the customer. The tax exempt ID defaults to the setting in the customer's Eclipse record in Customer Maintenance. |
| **Ship From Branch** | Select the distributing branch that handles the shipping for the job. You can ship stock from any branch using standard Eclipse inter-branch functionality, after the purchase orders for the job are created. <br><br> If there is a ship branch override set for the customer in the customer's record in Eclipse, the system populates the field with that branch. If there is no override specified in the customer's record, the system uses the ship branch indicated in your Job Management Profile. If that is also blank, the system defaults to branch 1. |
| **Ship Via (Vendors)** | Enter the shipping method that applies to vendors on this job. The system validates this field against the ship vias defined in Eclipse in Ship Via Maintenance. <br><br> **Note:** The default ship via displayed in this field is defined on the Job Management Administration page. |
| **Ship Via (Distributor)** | Enter the shipping method that applies to your shipping branches for this job. The system validates this field against the ship vias defined In Eclipse in Ship Via Maintenance. <br><br> **Note:** The default ship via displayed in this field is defined on the Job Management Administration page. |
| **Project Manager** | (Required) Enter the name of the user who will act as the project manager for the job. |

| Field | Description |
|-------|-------------|
| **G/L Sales Source** | Select the profit center that sold the product for example, outside sales or inside sales. A sales source lets you track where sales originate. Consider your sales source setting carefully. Changing sales source information makes prior period adjustments inaccurate. <br><br> **Note:** G/L sales sources are defined on the Eclipse G/L Sales Source Maintenance screen. |

7.  Click **Award Job** to award the job and apply the settings to the customer for the job, or click **Cancel** to return to the Job Summary page without awarding the job.

**To change the customer a job is awarded to:**

1.  Display the awarded job.

2.  Click the **Info/Settings** tab and navigate to the **Customer Information** area of the page.

3.  Click **Change customer this job is awarded to** and enter the customer and contact information in the displayed window. You can only award a job to a customer authorized for the current price branch assigned to the job.

    If you change the actual ship-to customer for the job, the change applies to all orders created for the job.

4.  Click **Save** to award the job to this customer.

# Viewing Job Statuses for Awarded Jobs

After you award a job to a customer, the system updates job status information so you can track the progress of the items for a job. You can drill down to the line item and see actions taken on each line item, such as when the item was added to the bill of material (BOM), or when it was placed on a release purchase order.

**To view job statuses for an awarded job:**

1. Display the awarded job.

2. Click **Job Summary** in the menu bar from any page in an active and awarded job.

3. Click the **Job Status** tab to view job statuses, shipping, change orders, quantities released or not, and hold balances by item or component.

   The following table describes each view-only column on the Job Status Summary table:

| Column | Description |
|---|---|
| Type | The item type of the line item. Click the type to view the following details about the item: <br>• **Date** - The date that the action in the **Action** column occurred. <br>• **Action** - The action on the job for the selected item, such as Added to Bill of Material, Change Order, or Sent PO. For actions that created documents, such as releasing an item to a purchase order, click the link to display the document. <br>• **Qty** - The item's total quantity from the action described in the **Action** field. |
| Vendor | The vendor providing the item for the job. |
| Description | A brief statement that describes the product or lot item from the **Description** field on the BOM. |
| Pending Change | Displays the basket icon 🧺 if the item is on an open change order. If the item is not on an open change order, this field is blank. |
| Total Qty | The total quantity of the item from the BOM. |
| Not on PO/SO | The quantity of the item not on a Hold for Release PO or a Release PO. |
| HFR | The quantity of the item on a Hold for Release PO. |
| Released | The quantity of the item on a Release PO. |
| Not Received | The quantity of the item that you have not received or invoiced. |
| Received / Invoiced | The quantity of the item that the customer has received and that you have invoiced to the customer. |
| Returned | The quantity of the item that the customer has returned. |
| % Complete | The percent of the items received by the customer. |

   **Note:** Sum totals of the columns **Not on PO/SO**, **HFR**, **Released**, **Received**, and **Not Received** equal the item's total quantity.

   To view and add items to shipments, use the Job Shipments table located below the Job Status Summary table.

# Completing Job Details

After you create a new job, enter the initial customer, and create the bill of materials (BOM) for the job, you can begin the bid process with customers and vendors. With Job Management you can track jobs from the initial bid request through the billing process for direct orders as well as stock orders. Job Management also tracks returns and credits as the job progresses.

This page describes how to add the following information for a job:

- General, such as dates and job status
- Customers bidding the job
- Vendors providing material for the job
- Representatives you are working with on the job

To view or update general, customer, vendor and representative information available for a job after awarding the job to a customer, click **Job Summary** from any page within a job, and click the **Info/Settings** tab.

**To enter general information for a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. Create a job or view an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. If you are creating a new job, click **Save** to ensure that your job data is saved.

   The fields that you completed when creating this job display in the **General Information** section.

4. Complete the additional fields or edit information in the **General Information** section, as needed.

| Field | Description |
|---|---|
| **Rebid Date** | Enter the date the job is rebid. For example, if you have a large project, you might create a bid prior to the finish of the design. Because the status of the design is unknown, you bid the job as normal. At a later date, you might need to change the bid you submitted for the job when the final design is complete. |
| **Follow-up Date** | Enter the next date to review the job in mm/dd/yyyy format. View **My Upcoming Deadlines** on the Job Management Home Page to view significant dates and deadlines in chronological order for your jobs. Monitoring this date helps you to avoid problems and prevent lost sales. |
| **Completion Date** | Enter the date the customer expects to finish the job or project in mm/dd/yyyy format. Use this date as a selection criterion for reviewing or reporting on orders. You can update this date as needed. |

| Field | Description |
|---|---|
| **Price Branch** | (Required) Select the branch that receives credit for the orders on this job. You can only select from branches for which you are authorized. |
| | If you award a job to a customer who has a pricing branch override defined in Customer Maintenance, the branches assigned to the job respect the override settings, and this field is view-only. |
| **Ship From Branch** | (Required) Select the distributing branch that handles the shipping for the job. You can only select from branches for which you are authorized. You can ship stock from any branch using standard Eclipse inter-branch functionality, after the purchase orders for the job are created. |
| | If you award a job to a customer who has a shipping branch override defined in Customer Maintenance, the branches assigned to the job respect the override settings, and this field is view-only. |
| **Job Status** | Select a status from the drop-down list that identifies the stage of the job, such as Bidding. If the job currently does not have a status, leave this field blank, or use the **No Bid** and **Lost Job** check boxes to indicate that you did not bid for the job, or lost the job. This list is populated with the job statuses defined on the Administration page. |
| **Personnel Fields** | Enter the quoter, project manager, architect, engineer, and any other people you want to include in the job summary information in the corresponding fields. |
| | You can only select users for these roles that are authorized for the current price branch for the job. |
| | **Note:** The project manager becomes the order writer when you manage purchase orders for the job. |
| **Win Confidence** | Select how confident you feel that you will win this job. This list is populated from the job win confidence values defined on the Administration page. The win confidence value you select s included in the Open Bid List Report. |
| **Job Type** | Select the type of product sold for the job, such as lighting. This list is populated from the job types defined on the Administration page. The job type you entered with creating the job displays in this field. |
| **Project Type** | Select the type of project the job is fulfilling, such as a Government job or a Commercial job. This list is populated from the project types defined on the Administration page. Use project types to help further classify the jobs you bid on and award. |
| **Have Take Off** | Select **Yes** if you have received the contractor's quantities from their assessment of the project's design blueprint, otherwise, select **No**. The default is **No**. |
| | The blueprint take off is a list of products for a job that can include type, manufacturer, catalog number, quantity, voltage, ballast, and lamp information. At some stages of the job design phase, you might not have this detailed information for the items required for the job. |

| Field | Description |
|---|---|
| **Approval Required** | Select **Yes** as a reminder that customer approval is required for the submittal package. When a job has been awarded to a customer, you send the customer a submittal package that contains the name of everyone involved in the job, an item schedule without pricing, and the manufacturers tear sheets for each item on the schedule. |
| **No Bid** | Select this option if you never bid the job. |

5. Click **Save** to save your changes to the general information for the job.

6. Continue to the **Customer** area to enter customer information for the job.

**To enter customers for a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. Create a job or view an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. Complete the fields in the **Customer** Information section as needed to identify the customers that are bidding on the job.

| Field | Description |
|---|---|
| **Customers For This Job** | Displays the customers used to create the job. Do the following, as needed:<br>• To add a customer, search for a customer by entering the customer name in the **Search for New Customer** field. Select the customer from the search results list and click **Add Customer**. The customer name displays in the Customers For This Joblist.<br><br>The system compares your accessible branches and the customers accessible branches. If you and the customer have branches in common, then you can add the customer to the job. Define user accessible branches in User Maintenance in Eclipse and customer accessible branches in Customer Maintenance in Eclipse.<br>• To delete a customer from the job, select the customer to delete, and then click **Delete Selected Customer**.<br>The customers you select here are used for all orders created for the job. |
| **Customer Information** | (View Only) The address and phone number for the customer selected in the **Customers For This Job** field. The system populates this information based on the information in Customer Maintenance for the customer.<br>If you have not completed any receiving for the job and need to update the address to which you are shipping material, click **Override Default Ship To Address** in the Ship To field and enter the new address information. |
| **Inside Salesperson** | (View Only) Name of the customer's inside salesperson from the Eclipse customer record. |
| **Outside Salesperson** | (View Only) Name of the customer's outside salesperson from the Eclipse customer record. |

| Field | Description |
|-------|-------------|
| **Main Contact Information** | Select the main contact person at the selected customer. The contact's information as defined in Eclipse displays.<br><br>After you award the job, enter main contacts and alternate contacts in the Site Contact section of the **Info/Settings** tab of the Job Summary page. |
| **Preferred Contact Method** | Enter the best way to contact the person, such as Main Phone Number or E-mail. |

4.  Click **Save** to save your changes to the customer information for the job.

5.  Do one of the following:

    -   Continue to the **Vendor** section to enter vendor information for the job.

    -   Send bids to the customers selected in the **Customers For This Job** field. You need to define the bill of materials prior to sending bids to customers.

    -   Indicate to which customer the general contractor awarded this job. After the job is awarded, the Job Summary page displays relevant information and options pertaining to the selected customer.

**To enter vendor information for a job:**

1.  From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2.  Create a job or view an existing job to display the Job Summary page.

    You can edit only jobs for which you have authorization or an associated role.

3.  Complete the fields in the **Vendors** section as needed to identify the vendors you are using on the job.

| Field | Description |
|-------|-------------|
| **Vendors For This Job** | Displays the vendors available for the job. The initial vendor list is generated by the default vendors set to display for all jobs on the Job Management Maintenance page. Do the following, as needed:<br>• To add a vendor, enter the name of the vendor in the **Add a Vendor** field, and click **Add Vendor**.The vendor name displays in the Vendors For This Joblist. Vendors must have an Eclipse vendor record to enter them in this field.<br>• To delete a vendor from the job, select the vendor to delete and click **Delete Vendor**. |
| **Vendor Information** | (View Only) The address and phone number for the vendor selected in the **Vendors For This Job** field. The system populates this information based on the information in Vendor Maintenance for the vendor. |
| **Quote Number** | The vendor's quote number that comes back on any paperwork from the vendor. This number is included in the Vendor Instructions section of the reserve, hold for release, and release purchase orders you create and send to the vendor. |

4.  Click **Save** to save your changes to the vendor information for the job.

**To add a representative to a job:**

1. From any page in Job Management, click **Home** in the menu bar to display the Job Management Home page.

2. Create a job or view an existing job to display the Job Summary page.

   You can edit only jobs for which you have authorization or an associated role.

3. Complete the fields in the **Job Reps** section as needed to identify the manufacturer reps you are using on the job.

| Field | Description |
|---|---|
| **Reps For This Job** | Displays the representatives for the job. The initial rep list is generated by the default reps set to display for all jobs on the Job Management Maintenance page. Do the following, as needed:<br><br>• To add a rep, enter the name of the rep in the **Add a Rep** field, and click **Add Rep**. The rep name displays in the Reps For This Joblist. Representatives must be assigned to the vendor on the Job Management Maintenance page before you can add them here.<br><br>• To delete a rep from the job, select the rep to delete, and click **Delete Rep**. |
| **Rep Information** | (View Only) The address and phone number for the rep selected in the **Reps For This Job** field. |

4. Click **Save** to save your changes to the representatives information.

# Overriding Ship-To Addresses for Awarded Jobs

The ship-to address for a job is based on the customer record associated with the bill-to customer to which you have awarded the job. A customer might require the material for a job be shipped to a different location than you have on file. For example, if the customer wants material shipped directly to a construction site. Override the ship-to address for the awarded customer to ensure the material for the job is shipped to the correct location.

The ship-to address override applies to all orders created for the job in Job Management.

**To override the ship-to address for an awarded job:**

1. Display the awarded job.

2. Click **Job Summary** in the menu bar from any page.

3. Click the **Info/Settings** tab and navigate to the **Customer Information** section of the page.

4. In the **Ship To** field, click **Override Ship To Address** to display the **Override Default Ship To Address** dialog box.

5. Enter the new ship-to information in the fields provided.

6. Click **Save** to save your changes or click **Cancel** to return to the Info/Settings page without saving your changes.

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**See Also:**

Completing Job Details

Awarding Jobs to Customers

# Bill of Materials Overview

Each job you create contains multiple products, likely purchased from multiple vendors. The bill of materials (BOM) provides the descriptions and quantities needed to request quotes from vendors and supply bids for your customers.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

After you create a job, you can start the process of building the BOM needed for the job. The detail contained on the BOM progresses from placeholder-type line items to specific products as you learn more about the job design, and as you receive quotes for pricing from your vendors.

After the sell price is defined through the bidding process, you (as the distributor) provide a quote or proposal to the requesting contractors bidding the project. After you award the job, notify the vendor or rep that you will be using them to purchase material for the job and request the complete breakdown of components and part numbers for the job - sometimes called the lighting schedule for lighting jobs. At this time, you can update the line items in the initial BOM to contain the exact products to complete the job.

> **Note:** If you have created Hold for Release or Release purchase orders for items on the BOM, the items for that vendor on the BOM are locked and the system does not allow you to make changes. Use change orders to make any changes to the pricing or quantities.

Multiple BOMs can exist for the same job. For example, if you have multiple customers bidding on the same job, you can create multiple BOMs, one for each customer.

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**See Also:**

Creating the Bill of Materials

Creating Multiple Bills of Materials for a Job

Importing the Bill of Materials from Microsoft Excel

Change Orders Overview

# Creating the Bill of Materials

After you create a job, you can begin to enter the products required for the job on the bill of materials (BOM). Likely, you will start with an initial BOM that contains a limited amount of detail. The detail contained in the BOM progresses from placeholder-type line items to specific products as you learn more about the job design, and as you receive quotes for pricing from your vendors. You can also import the BOM from a Microsoft Excel spreadsheet.

You can edit a BOM until you create the Hold for Release purchase order or a Release purchase order for a vendor. Creating Hold for Release purchase orders locks the items on the BOM for that vendor. If the items are locked on the BOM, use change orders to modify the pricing or quantities for the items from that vendor.

Multiple BOMs can exist for the same job. For example, if you have multiple customers bidding on the same job, you can create multiple BOMs, one for each customer.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job and the JOB.MGMT.EDIT.STK.COST authorization key to update the cost for stock products on the BOM.

**To create a bill of materials:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the default BOM for the job.

   See Creating Multiple Bills of Materials for a Job if you need to create more than BOM for a single job.

3. Complete the column entries for each product you are adding to the BOM.

| Field | Description |
|-------|-------------|
| **Type** | Enter a generic name for the kind of item needed for the job. The name must be unique to this BOM. For example, you might have an item schedule or blue print that indicates you need 10 different types of light fixtures. You might name each of those 10 as Item A through Item J to match the blue print. |
|  | This field is not required, but can help you track products against a blue print, especially for large jobs. |

| Field | Description |
|-------|-------------|
| **Vendor** | Enter the name of the company that supplies the materials to the customer. This field is not required for the initial bill of materials.<br><br>You can also enter a vendor rep in this field as you are sending out requests for quotes (RFQ). After the rep bids the job and the job is awarded to a customer, you can change this field to reflect the actual vendor who will be providing the items for the job.<br><br>You most likely complete this field after receiving the vendor pricing from the RFQ. Selecting vendors for items on the Vendor Pricing page populates this field with the same pricing information that you entered on that page.<br><br>To enter a vendor in multiple rows, select the row or rows to which you want assign the same vendor and click the assign vendor icon 🧑 . Select a vendor from the drop-down list and click **OK** or click **Cancel** to return to the BOM without entering the vendor. |
| **Description** | Enter a brief statement that describes the product and its associated item type. For the initial bill of materials, this description is likely generic. You can add to or change the description, as needed, as the job progresses.<br><br>After you decide on the exact product to use, do one of the following:<br><br>• **For nonstock products** - Enter a free form description of the product to order.<br><br>• **For a product you stock** - Enter a brief description, and click the searchicon 🔍 to search in the Eclipse product catalog or in bill of material history for the product. If you do not select a product from the search results, the system assumes you are entering a nonstock product. For more information about searching for products, see Searching for Products to Add to the Bill of Materials.<br><br>After you select a valid Eclipse product, the BOM displays the Eclipse product description and the product's cost and sell price based on the customer and pricing branch assigned in the **Job Management Admin** control maintenance record. If this control maintenance record is not set, the system uses the user's pricing branch to determine the cost and sell price. The vendor is also set to **Stock**. If you have awarded the job to a customer, the system uses the pricing and cost information for that customer. When you create the purchase order that contains this product, the stock product is added to the sales order in Eclipse and is flagged as a price override. If you have the **Reprice Sales Order Upon Invoicing** control maintenance record set to **No**, the system respects the price you set on the BOM for the stock product. If the control maintenance record is set to **Yes**, the system reprices the product at the time of invoicing to respect the most recent price updates you might have made in Eclipse.<br><br>The description you enter must be less than 255 characters. If you enter enough characters the first line wraps to the second line of the description, when you hide the full descriptions on the BOM, you only see the first line of text for the product. If you placed carriage returns to intentionally break the description across multiple lines, a notes 🗒 icon displays next to the description. Click the icon to view the full description. |

| Field | Description |
|-------|-------------|
| **Quantity** | Enter the quantity of the item type required for the job.<br><br>**Note:** Complete this field before sending the RFQ to vendors.<br><br>If you are entering a component for an item, enter the quantity of the component required per item. As you continue to enter cost information, the system calculates extended cost and extended sell information based on the quantity per item, multiplied by the item quantity.  For example, you have a lighting fixture on the BOM that you need a quantity of 10. Each fixture requires three light bulbs. Enter **3** in the component's **Quantity** field (quantity in this field says it is per item) to indicate that the fixture requires 3 bulbs each. The system then calculates the cost of the component you enter by multiplying it by 30, as you have 10 fixtures that require 3 bulbs each, which is a total of 30 bulbs.<br><br>If you are enter a stock product, the system displays a light bulb 💡 icon in the **Quantity** field. Move your mouse cursor over the icon to display the unit of measure information for the stock product including:<br>• The unit of measure in which the product is sold.<br>• The quantity contained in each unit of measure.<br>• And the pricing unit of measure.<br>The calculated extended cost and price are calculated as they are in orders you create in Eclipse using the pricing unit of measure to determine the price per each of the product you added. |
| **Unit/Lot** | Select how each line item is priced for each line item on the BOM:<br>• **Unit** - The item is priced as a single product, not a lot item.<br>• **A Lot** - The item is priced with the other items in the same lot. Complete this field before sending the RFQ to vendors.<br>For more information about unit versus lot pricing, and creating new lots see Pricing Line Items Per Unit or As a Lot for Jobs. |
| **Cost** | Enter the amount the vendor is charging you for the product and quantity of this item type. Complete this field after receiving vendor pricing.<br>The cost is usually considered the estimate of a product's total price including carrying costs. If you are using a product that you carry in stock, the system pulls the cost information from Eclipse.  For more information about lot pricing and how the system displays the cost for lot items, see Pricing Line Items Per Unit or As a Lot for Jobs.<br>If you are entering a stock item, the cost is determined based on the pricing for the customer awarded to the job, or the customer set to use for pricing in the Job Management Administration control maintenance record.<br>To edit the cost for a *stock* product in the BOM, you must be assigned the JOB.MGT.EDIT.STK.COST authorization key.<br>To apply the cost information from the Vendor Pricing page, and click the apply vendor cost icon 👤.<br><br>**Note:** Restrict changes to values in this field by selecting **Lock Cost Prices** in the **Default Formula** area. |

| Field | Description |
|---|---|
| **Extended Cost** | The system populates this field based on the following equation after you enter vendor pricing:<br><br>Quantity x Cost = Extended Cost.<br><br>For example, if the item's quantity is 15 and its cost is $10, the equation is 15 x $10, and the extended cost for the item equals $150.<br><br>**Note:** For lot items that list components as part of the lot, the utility displays the extended cost for each component, but extended cost is calculated only once for the entire lot. |
| **Margin/Markup** | Enter how much margin or markup you want to charge when you sell the product. Toggle the column heading by selecting either **Margin** or **Markup** in the **DefaultFormula >Use** field:<br><br>• **Margin** - The percentage of sales left over as profit after paying all expenses.<br><br>• **Markup** - The difference between the selling price and the cost of the item.<br><br>The value in these fields depends on what you enter as a default formula. In addition, if you edit the sell price, the **Margin** and **Markup** fields update automatically. This field calculates to six decimal places. However, the display rounds to three decimal places. For more information, see Applying a Default Pricing Formula to a Bill of Materials. |
| **Sell** | Enter the amount you are charging to the customer for the product. If you update the **Items Default Formula** field for margins or markups, the application recalculates this amount.<br><br>For information about setting up pricing formulas, see Applying a Default Pricing Formula to a Bill of Materials.<br><br>For stock products, you can override the price defined in Eclipse for the product for this job. When you create the order for the product, the price for the stock product is flagged as an override. Set the **Reprice Sales Order Upon Invoicing** control maintenance record set to **No** to respects the price you set on the BOM for the stock product when you invoice the order. |
| **Extended Sell** | The application populates this field based on the following equation after you enter an amount in the Sell field:<br><br>Quantity x Price = Extended Sell.<br><br>For example, if the item's quantity is 15 and its sell price is $12, the equation is 15 x $12, and the extended price for the item equals $180. |
| **Submittal Status** | (Optional) If you are creating submittal documents for items on the BOM, select a status of the submittal, such as On Submittal to indicate the item is waiting for customer approval, or Approved to indicate the customer has approved the item. Define line item statuses on the Administration page.<br><br>If a vendor has a submittal in a pending status, such as On Submittal or Hold, the item displays with red informational icon ⛔ on the Manage POs page.<br><br>To assign the same submittal status to more than one item on the BOM, select the check box next to the items and click the assign submittal 📝 icon. Select the status and click OK. |

4. Add components to items, as necessary.

5. Click **Save** to save your entries on the BOM.

**More Options When Creating Bills of Materials**

When creating a BOM, you also have the following options:

| To... | Do this... |
|---|---|
| apply commands, such as assigning vendors or removing rows, to multiple rows at a time | select the rows to which you want to apply the same command using the check box  at the beginning of the row.<br>To select all rows, select the check box in the table heading.<br>You can apply the following actions to checked rows:<br>• Remove, cut, and paste the row.<br>• Assign vendors.<br>• Apply formulas.<br>• Add notes. |
| display the entire product description | in the **View** area, click **Show full Description** to expand the description field of every row in the BOM. |
| update pricing information for stock items based on the cost for the product/customer/branch combination after you award the job to a customer | select the row or rows you want to update and select **More Actions > Update Stock Cost/Price**.<br>Selecting this option updates the stock price from the default customer's pricing to the pricing for the customer awarded to the job. |
| view rebate information for stock items | hold your mouse over the money icon  in the last column of a stock item to display the pricing contract expiration date and the contract number.<br>If you have not awarded the job to a customer, the rebate information displays for the customer entered in the Customer used for pricing field in the **Job Management Administrator** control maintenance record. |
| view the existing notes for an item | click the edit notes icon  in the last column to display the notes associated for the item. For information about creating item-level notes, see Creating Item-Level Notes. |
| send submittal documents to your customer | select the items to include in the submittal and then select **More Actions > Submittal Table of Contents**. |
| move a row up in the table | select the row you want to move and then select **More Actions > Edit > Move Row Up**. The system moves the item up one row on the BOM.<br>Select a single row to move at a time. |
| move a row down | select the row you want to move and then select **More Actions > Edit > Move Row Down**. The system moves the item down one row on the BOM.<br>Select a single row to move at a time. |
| add rows to the BOM | enter the number of rows you want to add in the blank field on the left side of the BOM toolbar and click the add icon . |
| copy and paste the contents of a row or rows | select the row or rows you want to copy and paste, and then select **More Actions > Edit > Copy**. Select the row where you want to paste the contents you copied and then select **More Actions > Edit > Paste**. The system pastes the content from the rows that you cut above the selected row. |

| To... | Do this... |
|-------|-----------|
| insert the contents of a copied row | select the row below where you want to insert the copied row and then select **More Actions > Edit > Insert Copied** Row. |
| remove a row | select the row or rows you want to remove and click the remove item icon  . |

# Creating Multiple Bills of Materials for a Single Job

You can create more than one bill of materials (BOM) for a single job. For example, if you have several customers bidding on the same job, you might choose to create the job once in the system and then create a separate BOM with unique pricing information for each customer.

Each job has a default BOM, which is the first BOM that you create for the job.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

**To create multiple BOMs for a job:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the default BOM for the job.

3. Click **View** and then click **New**.

4. In the **Name** field, enter a name that identifies this BOM from the other BOMs that exist for the job. This field is required.

5. If you would like to create the new BOM with information from an existing BOM for the job, select the BOM you want to use as a base from the **Copy From** field.

   To start with a blank BOM, leave this field blank.

6. Click **OK** to create the new BOM, or click **Cancel** to return to the Bill of Materials page without creating a new BOM.

**To rename a BOM for a job:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the default BOM for the job.

3. Click **View**.

4. From the **Bill of Material** field, select the BOM you want to rename and click **Edit**.

5. In the **Name** field, enter the new name for the selected BOM.

   **Important:** If you are renaming the default BOM to better identify it, select the original default BOM in the **Copy From** field. If you leave the **Copy From** field blank when renaming the default BOM, the system creates a blank BOM and deletes any information you had entered in the default.

6. Click **OK** to rename the BOM, or click **Cancel** to return to the Bill of Materials page without renaming the BOM.

# Importing the Bill of Materials from Microsoft Excel

If you have product information for the bill of materials (BOM) in an external format, such as a Microsoft Excel spreadsheet, you can upload the spreadsheet and map the columns of data to the columns in the Job Management BOM.

You can also import a file that will become a BOM or a partial BOM into a BOM you have started in the Job Management application.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

To import a file into the BOM, complete the following steps:

- Select and upload the file.

- Map the spreadsheet's columns to BOM columns.

- Import the mapped data and save.

**To select and upload the Microsoft Excel file:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the bill of materials for that job.

3. Select **More Actions > Excel > Import** in the bill of materials header.

4. Click **Add** and select the Excel file you want to import, and then click **Open**.

   The path to the document displays in the list.

5. Repeat step 4 to add additional excel files you want to import.

   Click **Cancel** next to a document in the list to remove it from the list of documents to upload.

6. Click **Upload** to upload the contents of the file into the BOM, or click **Cancel** to return to the Bill of Materials page without uploading a file.

7. Map the spreadsheet's columns into the Job Management BOM format using the instructions below.

**To map the spreadsheet's columns to match the BOM columns:**

1. Select and import the spreadsheet into Job Management.

   The system displays the columns from your original spreadsheet. Only the first five rows of data from the spreadsheet display.

2. For each column listed, select the BOM column in the Job Management BOM to which you want to import the data.

   Select **Do Not Import** for any columns of data you do not want to include in the BOM in Job Management.

3. Do the following to tell the system how to add the spreadsheet data to the existing BOM:

| To... | Do this... |
|-------|-----------|
| select how you want the system to combine data from the spreadsheet with the items already entered in the BOM | select one of the following options:<br>• **Append** - Adds the data from the imported spreadsheet starting at the first available row at the bottom of the BOM. This is the default.<br>• **Override** - Replaces any data you already have entered on the BOM with the data from the imported spreadsheet. |
| exclude the first row of the spreadsheet, likely a row that includes column headings | select the **Do Not Import First Row** check box. |

**To import the mapped data into the BOM:**

1. Select and import the spreadsheet into Job Management.

2. Map the spreadsheet's columns to match the BOM columns.

3. Click **Import** to import the data into the columns you selected.

   The system displays the populated BOM. Review the entries to ensure your data imported correctly, and make any necessary changes.

4. Click **Save** to save your changes to the BOM.

# Searching for Products to Add to the Bill of Materials

The product search function lets you quickly search for a product in the Eclipse product file or within Job Management by keyword or part number.

**To search for a product to add to a bill of materials:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the bill of materials (BOM) for that job.

3. In the **Description** field for a line item on the bill of materials, click the search icon 🔍 to display the Search Results window.

   For items that are already on the bill of materials that you have in stock, click the stock icon 🖼 to display the Search Results window.

   If there was text entered in the **Description** field when you clicked the icon, the window displays with the items that match that text in Eclipse.

4. Select the tab of the location you want to search:

   - **Search Eclipse** - The system searches the Eclipse product file for products that match the text you entered in the **Catalog/Description** field. To include catalog items in your search, select the **Search Catalog** check box.

   - **Search Job Management** - The system searches the product descriptions on other BOMs within Job Management. The search is not limited to only BOMs created for this job. Searching for products in Job Management can help find nonstock products that you have entered on other BOMs for other jobs.

5. In the **Catalog/Description** field, enter at least the first three characters of the product you are trying to find. The more characters you enter, the more refined the search results will be.

6. Click **Search Again** to display the matching products.

# Creating Nonstock Product in the Bill of Materials

As you are creating your bill of materials, you might find that the items are required for the job that you do not typically stock. You can create nonstock product records directly through Job Management, without having to go into Eclipse.

The system creates product records for each nonstock product that you create using the following procedure.

**To create a nonstock product in a bill of materials:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the bill of materials (BOM) for that job.

3. In the **Description** field for a line item on the bill of materials, click the search icon 🔍 to display the Search Results window.

4. Click the **Create Nonstock** tab and enter the product description in the **New non-stock description** field.

5. In the **Use this vendor's product as non-stock template** field, select the vendor's default product template to use to create the product record. The system creates the record with the settings defined in the product you selected as the vendor default product.

   If you leave this field blank, the system creates a product record using the product defined in the Default Product Record in the **Job Management Administrator Settings** control maintenance record.

6. Click **Create Nonstock** to create the product record in Eclipse, and to add the product to the BOM.

# Adding Components to Items on the Bill of Materials

As you add items to the BOM, you can also add components, or related products, that go with those items. For example, if you add a lighting fixture to the BOM, you likely want to add the bulbs or the mounting hardware for those fixtures as well. Add the bulbs or mounting kits as components on the BOM and enter the quantity required per fixture. The system calculates the extended cost and extended sell information for you by multiplying the quantity required per fixture by the quantity of the actual fixture.

For example, you are ordering 10 fixtures that require 10 bulbs each. That is a total of 100 bulbs to fill the 10 fixtures. Each bulb costs $2.00. The system calculates the extended cost to be $200.

You can choose to show, hide, or roll up the price of components on a job on output documents, such as a bid you send to a customer.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

**To add a component to an item on the BOM:**

1.  On the Job Management Home page, create a job or search for an existing job.

2.  From the Job Summary menu bar, click **Bill of Materials** to display the BOM for that job.

3.  Add an item to the BOM.

4.  Click the components icon next to the item to which you want to add a component.

    The icon image is set with the job type in the Administration page.

    The system inserts a line below the item and indicates that it is connected with the line item above with an item connection icon.

    To add multiple blank component lines at a time, select the check box next to the items to which you want to add components, and then click the components icon in the Bill of Materials toolbar.

5.  Complete the column entries for each component you are adding to the BOM, as you would for other items on the BOM.

6.  To add additional components to an item, click **Add Component** in the first component listed under an item.

7.  Click **Save** to save your entries on the BOM.

**To show and hide components for an item on the BOM:**

1.  On the Job Management Home page, create a job or search for an existing job.

2.  From the Job Summary menu bar, click **Bill of Materials** to display the BOM for that job.

3.  From any BOM, click the components icon next to the item to display the components included for that item.

    The system displays an item connection icon ↳ next to the components.

4.  To hide the components, click the components icon again.

# Pricing Line Items Per Unit or As a Lot for Jobs

As you gather pricing information from your vendors for items for a job, your vendors provide price quotes per item unit or for a group of items on a job. If items are priced in a group, the pricing is considered lot pricing, and you can indicate the items as lot priced directly on the bill of materials (BOM) using the **Unit/Lot** field for each line item. The vendor lot pricing displays for each line on the BOM that is associated with that vendor lot.

You can use a combination of unit pricing and lot pricing in a single bill of materials (BOM).

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

## Unit Pricing

If you use unit pricing for items on a job, your vendor has supplied pricing for a single product. Enter the unit price information for each line item on the BOM individually. The system calculates the extended cost and sell information by multiplying the quantity times the cost (or sell) price.

**To enter pricing for a unit-priced item:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the default BOM for the job.

3. Complete the column entries for each product you are adding to the BOM.

4. In the **Unit/Lot** field, select **Unit** to indicate that the item is individually priced.

5. Enter the price information as described in Creating the Bill of Materials.

6. Click **Save** to save your changes.

## Lot Pricing

If your vendor prices a group of items together, that is considered lot pricing, and you can indicate lot-priced items directly on the bill of materials. For example, instead of pricing line item A, B, and C separately, your vendor says they will give you all three line items at the quantity you need for a certain price, not breaking the price down per line item. You still need to capture this cost on the bill of materials.

**Important:** After you assign a line item in the BOM a lot price, if you change the lot price for one item in the lot, the price for the other items in the lot updates as well. You can add items to or remove items from the lot until you create a Hold for Release purchase order or Release purchase order for the items. After creating a purchase order, use change orders to add to or remove from the lot.

**To create a lot on the BOM:**

1.  On the Job Management Home page, create a job or search for an existing job.

2.  From the Job Summary menu bar, click **Bill of Materials** to display the BOM for that job.

3.  Add an item to the BOM.

4.  In the **Unit/Lot** field, select New Lot and enter the name of the lot.

    The lot name defaults to the vendor in the Vendor field for the item.

5.  Click **OK** to create the lot and apply it to the line item or click **Cancel** to return to the BOM without creating the lot.

6.  Enter the price information as described in Creating the Bill of Materials for the entire lot.

    The system saves the lot you created, and it is immediately available in the drop-down list in the **Unit/Lot** field.

7.  Click **Save** to save your changes.

**To assign an existing lot to a line item on the BOM:**

1.  On the Job Management Home page, create a job or search for an existing job.

2.  From the Job Summary menu bar, click **Bill of Materials** to display the BOM for that job.

3.  Add an item to the BOM.

4.  In the **Unit/Lot** field, select the lot to assign to the line item.

    The system assigns the item the same pricing as the other items in the lot.

5.  Click **Save** to save your changes.

# Applying Default Pricing Formulas to a Bill of Materials

As you add items to the bill of materials (BOM) you can apply a default pricing formula on a markup or margin basis. Applying a default formula can save you time when creating lengthy BOMs for a job, and also helps ensure accuracy and consistency across items and components on the BOM.

If you have created purchase orders for items on the BOM, the BOM is locked and the system does not allow you to change its contents. Use change orders to make any changes to the pricing information on the BOM.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

**To apply a default formula:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the BOM or that job.

3. In the **Default Formula** area, do the following, as needed:

| To... | Do this... |
|---|---|
| define to which line items the default formula applies | for the fields **Items Default Formula** or **Related Items Default Formula**, select one of the following:<br>• **Selected Rows** - Applies the formula to only the line items selected in the BOM.<br>• **All Rows** - Applies the formula to all the line items in the BOM. |
| apply the formula to only the cost amounts, locking the sell prices | select **Lock Sell Prices**.<br>When you apply the formulas, the formula does not change any sell prices already entered in the BOM.<br><br>**Note:** Typically, you lock sell and cost prices on stock material after you have awarded the job. |
| apply the formula to only the sell prices, locking the cost amounts | select **Lock Cost Prices**.<br>When you apply the formulas, the formula does not change any cost prices already entered in the BOM.<br><br>**Note:** Typically, you lock sell and cost prices on stock material after you have awarded the job. |

| To... | Do this... |
|---|---|
| display the default margin or markup for each line item | in the **Use** field, select one of the following to toggle the **Margin/Markup** field in the BOM:<br>- **Margin** - The percentage of sales left over as profit after paying all expenses.<br>- **Mark up** - The difference between the selling price and the cost of the item.<br>The value in these columns depends on what displays in the **Sell** column. If you edit the sell price, the application automatically recalculates the margin and markup. The margin or mark up calculates to six decimal places. However, the display rounds to three decimal places |
| apply a default formula to only items in the BOM | 1. Depending on the option selected in the **Use** field, enter the percentage of margin or markup in the **Items Default Formula** field that you expect to receive from each item on the BOM.<br><br>2. Select the items to which you want to apply the default percentage calculations by doing one of the following:<br><br>- Select the items on the BOM to which you want to apply the formula.<br>- Select **All Rows** next to the **Items Default Formula** field to apply the calculation to all rows on the BOM.<br>3. Click **Apply to Items** to apply the calculation to the items. |
| apply a default formula to only components in the BOM | 1. Depending on the option selected in the **Use** field, enter the percentage of margin or markup in the **Items Default Formula** field that you expect to receive from the components, or items related to an item on the BOM.<br><br>2. Select the components to which you want to apply the default percentage calculations by doing one of the following:<br><br>- Select the component items on the BOM to which you want to apply the formula. Click the components icon next to an item to view the components for that item.<br>- Select **All Rows** next to the **Related Items Default Formula** field to apply the calculation to all components on the BOM.<br><br>3. Click Apply to Related Items to apply the calculation to the components. |

4. Click **Save** to save your changes and continue creating the BOM.

# Applying Quote Pricing to Awarded Jobs

Using Eclipse, you can define a quote for price groups or products. You can then select the quote to apply the special pricing to the products that are on the bill of materials for awarded jobs.

Quotes are:

- Assigned to any customer. Notify customers of a special price quote and instruct them to relay the quote name or number to the order taker.

- Assigned an effective date and an expiration date. After the expiration date is reached, the quote is no longer offered as an option in the bill of materials.

- Assigned an original quantity and a remaining quantity for each product assigned to the quote. The amount can be in units, pounds, load factor, or dollars worth of product. When the remaining quantity reaches zero, the quote pricing expires. If a customer orders more than the remaining quantity of a product on a quote, normal pricing goes into effect for the number of items over the remaining quantity.

For more information about creating quotes using Quote Maintenance, see the Eclipse or Solar Eclipse online help.

**To apply quote pricing to an awarded job**

1. Create the bill of materials (BOM) and award the job to a customer.
2. From the Job Summary menu bar, click **Bill of Materials** to display the BOM for the job.
3. In the **Quotes** field, select the quote you want to apply to the stock items on the BOM.
4. Click Save to save the changes to the BOM.

# Applying Engineering Fees to Jobs

For some of your jobs, you might work with a manufacturer representative when bidding items for large jobs. These representatives add value to the supply chain by providing a single-stop shop for distributors for sourcing, costing, and bundling material needed for large and potentially complex jobs. The representatives do the majority of the leg work for identifying all the material needed for the job, determining the appropriate manufacturer and product types. In return, you pay them a fee for doing this work in the form of an engineering fee.

You can define engineering fees that you are charged for a job directly on the bill of materials (BOM), and create purchase orders for those fees. For example you are working with a rep that gives you a cost for items on the BOM at $10,000. At early points in the bidding process, the representative might not know who the actual vendor is that will be supplying the material. When you award the job, you tell the rep that you need the final pricing on the material, and at this point you need the vendor information to creating the purchase orders for the job.

The rep provides you with the name of the vendor, and indicates at this point that the actual material cost is $9000 and the engineering fee is $1000. When you have this information, go back into the BOM and decrease the amount of the material by $1000 and add that as the engineering fee for the job.,

**Important:** To apply engineering fees, you must have representatives defined and associated with vendors and manufacturers.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

**To apply an engineering fee to a job:**

1. On the Job Management Home page, create a job or search for an existing job.

2. From the Job Summary menu bar, click **Bill of Materials** to display the bill of materials for that job.

3. Click **Engineering Fees** to display the engineering fees table.

   A list of default reps defined on the Maintenance page displays. Hold your mouse over the rep's name to view information regarding the line items on the BOM to which the rep is associated.

| Field | Description |
|---|---|
| **# of Line Items** | The total number of line items on the BOM assigned vendors associated with the rep. |
| **Total Cost** | The total cost of the line items on the BOM assigned vendors associated with the rep. This amount is the total of the extended costs for each item associated with the rep. |

| Field | Description |
| --- | --- |
| **Total Sell** | The total sell price of the line items on the BOM assigned vendors associated with the rep. This amount is the total of the extended sell prices for each item associated with the rep. |
| **GP%** | The gross profit percentage, as determined by the pricing matrix for the items, customers, and products on the BOM. |
| **Vendors** | The vendors assigned to line items on the BOM that are associated with the rep. |

4.  In the **Fee** column, enter the dollar amount to pay the representative for this job.

    After you have started creating purchase orders for items on the BOM, you can make changes to this amount using change orders.

5.  Click **Save** to save your entries.

# Printing or Exporting Bills of Materials

You might need to print the bill of materials (BOM) for a job, or export it to view it in an external program such as Microsoft Excel. To print the BOM, you must first export the content to an .xhtml file, and then print it from an external program.

You must be assigned the JOB.MGMT.BOM authorization key to create and work with the BOM for a job.

**To export a bill of material:**

1. Create the bill of materials and save it.

2. Select **More Actions > Excel > Export** in the bill of materials header.

3. Click **Save** to save the file to a directory on your computer or network.

   The application exports the file in .xhtml format that you can open with Microsoft Excel. The system saves the job information on a separate worksheet within the Excel workbook. If you import the exported BOM into a different job, import the worksheet that contains the BOM list.

   See the Microsoft Excel documentation for details about working with .xhtml files.

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**See Also:**

Creating the Bill of Materials

Bill of Materials for Jobs Overview

# Managing Purchase Orders and Releases Overview

After you award a job to a customer, and finalize the cost and sell information with your vendors and the customer, you can begin to create purchase orders for the items on the bill of materials (BOM) for a job. As you create purchase orders for items on the BOM, the system creates the orders to send to your vendors, and also creates direct orders that you can view in Eclipse. Each direct order created contains both the sales order for the customer and the purchase order for your vendor.

The system creates orders for material that is not coming from your inventory as direct orders. For material that you have in stock, the system creates standard sales orders. The price for stock product on the Job Management sales order is flagged as an override. If you have the **Reprice Sales Order Upon Invoicing** control maintenance record set to **No**, the system respects the price you set on the BOM for the stock product. If the control maintenance record is set to **Yes**, the system reprices the product at the time of invoicing to respect the most recent price updates you might have made in Eclipse.

You must be assigned the JOB.MGMT.MANAGE.PO authorization key to create purchase orders and releases.

> **Note:** You can view the direct order in Eclipse or Solar Eclipse and change the ship status to any all or ship status. You can also change the print flag to Invoice. However, if you need to make any other changes to the order or to cancel the order, you need to use change orders in the Job Management application.

The Manage POs page groups all the items on the BOM starting with items you plan to pull from your stock, and then by the vendors as assigned on the BOM. When you first access the Manage PO page, you have the option to create the following purchase order types for each vendor:

- **Reserve PO** - Reserves the order number for future use and sends the number to the vendor. Reserve POs are not required, however, your vendor might require a purchase order number prior to working with you regarding pricing for the job.

- **Hold for Release PO** - Tells your vendor what items you need for the job, creates a direct order in Eclipse, but does not authorize the vendor to ship any items to your customer. Hold for Release POs are not required, unless you are creating partial releases for a job.

- **Release POs** - Tells your vendor that they can ship items to your customer and generates a direct order in Eclipse based on the customer and vendor information specified for the job. If you create a Release PO for stock items, the system creates a standard sales order, not a direct order.

As you create orders for a vendor for a job, the page updates the options available, based on the orders you have created for the vendor. In the following example, a Hold for Release PO was created and sent to Cooper Lighting on January 16, 2008. Therefore, the option to create a Hold for Release PO or a Reserve PO are no longer available for the vendor.

**COOPER LIGHTING**
Hold for Release PO sent on 2008-01-16
Fill in Release with all available quantities

| | Type | Description | Total Qty | Not on PO | On HFR | Released | Unreleased | Release Now | Notes |
|---|---|---|---|---|---|---|---|---|---|
| | L-10 | Fixture E | 10 | | 5 | 5 | 5 | 0 | |

The page speeds up the order creation process by allowing you to create multiple orders at one time. For example, if you are ready to create Hold for Release POs for all your vendors, select that option for each vendor on the page and click **Create POs** at the bottom of the page. The system sends you to a page where you specify delivery information for each individual order and then create and send the documents for each order at the same time.

If a vendor has a submittal in a pending status, such as On Submittal or Hold, the item displays with red informational icon ⊙ on the Manage POs page. You can still release these items.

| | Type | Description | Total Qty | Not on PO | On HFR | Released | Unreleased | Release Now | Notes |
|---|---|---|---|---|---|---|---|---|---|
| ↺ | L-1 | Fixture A | 10 ⊙ | 10 | | 0 | 10 | 0 | |
| | L-1^10408 | F96T12 | 30 | Submittal Status: **On Submittal** | | | 30 | 0 | |
| ↺ | L-2 | Fixture B | 10 ⊙ | 10 | | 0 | 10 | 0 | |
| ↺ | L-3 | F96T12 | 48 | 48 | | 0 | 48 | 0 | |

**See Also:**

Reserving Purchase Order Numbers for Jobs

Creating Hold for Release Purchase Orders for Jobs

Releasing Items for Jobs

Creating Partial Releases for Jobs

Creating Purchase Orders for Engineering Fees for Jobs

# Reserving Purchase Order Numbers

Your vendors might require a purchase order number from you to do any work on a quote for the material you need for a job. To provide this number for your vendor, and to reserve the number in Eclipse, create a Reserve PO. Creating a Reserve PO for the vendor *does not lock* the items for the vendor on the bill of materials (BOM), nor does it release any items for the job.

Reserve POs are not required to release material for a job. However, your job scenario might require Hold for Release POs prior to releasing items for a job.

You can select how much information you want to include on the Reserve PO. For example, you can create it to include the order number but no information regarding quantities, product descriptions, or cost information for the job.

You must be assigned the JOB.MGMT.MANAGE.PO authorization key to create purchase orders and releases.

**To reserve a purchase order number:**

1. Award the job to a customer and finalize the contents on the BOM.

2. In the Job Summary menu bar, click **Manage PO** to display the Manage POs and Releases page.

   The page lists the items on the BOM by vendor. For more information about the contents of the page, see Managing Purchase Orders and Releases for Jobs Overview.

3. For each vendor for which you want to create a Reserve PO, select the **Send Reserve PO** check box under the vendor's name and click **Create POs** at the bottom of the page.

   If you have created a Hold for Release PO or have released items for the vendor, the **Send Reserve PO** option is no longer available for the vendor.

   **Note:** As you create POs for the job, you can select to create different PO types from this page. When you click **Create POs**, the system displays the settings for Reserve POs first, Hold for Release POs second, and Release POs last on the next page.

4. In the Create a Reserve PO section, select how you want to send the Reserve PO to the vendor.

5. Select the information you want to include on the Reserve PO.

| Field | Description |
|---|---|
| **Show Line Items** | Select **Yes** to include the quantities and the items descriptions as they are defined on the BOM. <br> Deselect this option to send the Reserve PO without any information regarding quantities or products for the job. |
| **Show Cost** | Select **Yes** to include the cost information for the items on the BOM. <br> Deselect this option to send the Reserve PO without any information regarding the cost of items for the job. |

| Field | Description |
|---|---|
| **Subtotal Components** | Select **Yes** to include a subtotal of the cost of an item and all its components. |
| **Custom Text Message** | Enter any comments in the adjacent field to include at the bottom of the Reserve PO. For example, you might want to comment on the quantities or items included.<br>Deselect this option to send the Reserve PO without any additional comments. |

6.  In the **Freight Terms** field, select how the vendor expects to be paid for freight charges for the order.

7.  In the **Internal Notes** field, enter any confidential comments that you want to note for the order, but that you do not want to include on the Reserve PO sent to the vendor.

8.  Click **Confirm** to create the Reserve PO or click **Cancel** to remove your changes and return to the Job Summary page for the job without creating the Reserve PO.

    The system sends the Reserve PO to the vendor according to the information you entered in step 5 and creates the direct order in Eclipse.

    If you are entering information for more than one Reserve PO or more than one purchase order type on this page, the system sends all the purchase orders when you click **Confirm**.

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**See Also:**

Creating Hold for Release Purchase Orders

Releasing Items from Vendors or from Stock

Splitting Items into Smaller Components for Release, Receiving, and Return

Viewing Vendor Cost, Price, and Transactions

Managing Purchase Orders and Releases Overview

# Creating Hold for Release Purchase Orders

When you have the final numbers for the items on the bill of materials (BOM), create a Hold for Release purchase order (PO) to create a direct order in Eclipse based on the customer and vendor information specified for the job. Hold for Release POs are useful as a communication tool to tell your vendor what items you need for the job, especially when you are ordering a large quantity of an item, but does not authorize the vendor to ship any items to your customer. As the job progresses, you authorize the vendor to send shipments of the items using Release POs.

> **Note:** Creating a Hold for Release PO for stock items creates the sales side of the direct order, but does not create the purchase order side, because a purchase order is not required for items that you carry in stock. Use Hold for Release POs for stock if you want to release items in partial shipments.

Creating a Hold for Release PO *locks* the items for the vendor on the BOM. If you need to make changes to the BOM after creating a Hold for Release PO for a vendor, use change orders.

Hold for Release POs are not required. Create Hold for Release POs if you plan to release an item in multiple shipments from the vendor. If you created a Reserve PO prior to the Hold for Release PO, the system updates the order to reflect the status, but keeps the same order number.

You must be assigned the JOB.MGMT.MANAGE.PO authorization key to create purchase orders and releases.

**To create a Hold for Release PO for a job:**

1. Award the job to a customer and finalize the contents on the BOM.

2. In the Job Summary menu bar, click **Manage PO** to display the Manage POs and Releases page.

   The page lists the items on the BOM by vendor. For more information about the contents of the page, see Managing Purchase Orders and Releases for Jobs Overview.

3. For each vendor for which you want to create a Hold for Release PO, select the **Send Hold for Release PO** check box under the vendor's name and click **Create POs** at the bottom of the page.

   If you have created a Hold for Release PO or have released items for the vendor, the **Send Hold for Release PO** option is no longer available for the vendor.

   Note: As you create POs for the job, you can select to create different PO types from this page. When you click **Create POs**, the system displays the settings for Reserve POs first, Hold for Release POs second, and Release POs last on the Create POs page.

4. In the Create Hold for Release POs section, in the **Representative** field, select the vendor's representative to which to apply engineering fees for the order.

5. Select how you want to send the Hold for Release PO to the vendor.

6. In the **Freight Terms** field, select how the vendor expects to be paid for freight charges for the order.

7. In the **Order by** field, enter the name of the person ordering the items on the purchase order.

8. In the **Customer Release #** field, enter the optional number the customer has assigned to this order for tracking purposes. This is a number assigned to the order in addition to a PO number.

9. In the **Payment Terms** field, select how the vendor expects to be paid for the order.

10. In the **Subtotal Components** field, select **Yes** to include a subtotal of the cost of an item and all its components.

11. In the **Internal Notes** field, enter any notes that you want to make regarding the order that you do not want to print on the actual order.

    The notes you enter here display in the **Internal Notes** field in the Sales Order Entry header for the order.

12. In the **Vendor Instructions** field, enter any information regarding the shipment of items on the order and select where on the form you want to display the vendor instructions.

    The notes you enter here display in the **Shipping Instructions** field in the Sales Order Entry header for the order. They also print on the actual purchase order.

13. Click **Confirm** to create the Hold for Release PO or click **Cancel** to remove your changes and return to the Job Summary page without creating the Hold for Release PO.

    After you click Confirm, the system locks the items on the BOM for this vendor, sends the Hold for Release PO to the vendor according to the information you entered in step 5, and creates the direct order in Eclipse. You can view the direct order in Eclipse or Solar Eclipse, however, if you need to make a change, you need to use change orders in the Job Management application.

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**See Also:**

Reserving Purchase Order Numbers

Releasing Items from Vendors or from Stock

Managing Purchase Orders and Releases Overview

Viewing Vendor Cost, Price, and Transactions

# Releasing Items from Vendors or from Stock

A Release PO indicates to your vendor that they can ship items to your customer and generates a direct order in Eclipse based on the customer and vendor information specified for the job. If you created a Hold for Release PO or a Reserve PO for the vendor, the system continues to use that order number to release the material.

> **Note:** Creating a Release PO for stock items creates a standard sales order, as a direct order is not required.

Creating a Release PO *locks* the items for the vendor on the bill of materials (BOM). If you need to make changes to the BOM after releasing material, you need to use change orders.

If you plan to do a partial release of items, you need to create a Hold for Release PO for the vendor prior to creating a partial Release PO. For more information about completing partial releases, see Completing Partial Releases for Jobs.

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> **Important:** If items in the BOM are assigned a line item status that is marked as **Item Cannot be Released**, the system displays a warning icon 🔴 on the Manage POs page that indicates that an item is still in a status tagged as ineligible for release. The warning is only an informational indication, and does not prevent you from releasing the item.

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You must be assigned the JOB.MGMT.MANAGE.PO authorization key to create purchase orders and release POs. You can only release items from a vendor authorized for the current ship branch assigned to the job, unless you have previously created a Reserve PO or Hold for Release PO for the items.

> **Note:** If a customer is on Credit Hold, you cannot release material for the job for that customer.

**To release all the available quantities from a vendor:**

1. Award the job to a customer and finalize the contents on the BOM.

2. In the Job Summary menu bar, click **Manage PO** to display the Manage POs and Releases page.

   The page lists the items on the BOM by vendor. For more information about the contents of the page, see Managing Purchase Orders and Releases for Jobs Overview.

3. For each vendor for which you want to release items, select the **Release All** check box under the vendor's name and click **Create POs** at the bottom of the page.

   As you create POs for the job, you can select to create different PO types from this page. When you click **Create POs**, the system displays the settings for Reserve POs first, Hold for Release POs second, and Release POs last on the next page.

   > **Note:** If you are releasing items that do not have an approved submittal status, enter the reason for overriding the status and approving the items for release and click **Yes** to continue.

4.  Select how you want to send the Release PO to the vendor.

5.  Complete the following fields for the Release PO:

| Field | Description |
|---|---|
| **Show Cost** | Select **Yes** to include the cost information for the items on the BOM. Deselect this option to send the Reserve PO without any information regarding the cost of items for the job. |
| **Subtotal Components** | Select **Yes** to include a subtotal of the cost of an item and all its components. |
| **Release Date** | Select the date on which you authorize the vendor to send the items to your customer. |
| **Require Date** | Select the date the customer needs the items on the order. |
| **Customer Release #** | Enter the optional number the customer has assigned to this order for tracking purposes. This is a number assigned to the order in addition to a PO number. |
| **Ship Via** | Select the shipping method used to send the items to the customer, for example, UPS. |
| **Freight Terms** | Select how the vendor expects to be paid for freight charges for the order. |
| **Payment Terms** | Select how the vendor expects to be paid for the order. |
| **Release Number** | Enter an identifier for the release. For example, if you are authorizing your vendor to ship items to your customer in three shipments, you can indicate this is release 1a in the **Release Number** field. The release number is informational only and does not display on the order in Eclipse. If you authorize multiple shipments from a vendor, the system does not create a new generation on the Eclipse order. The release number is provided to the vendor through the purchase order documents sent directly from Job Management. |
| **Order By** | Enter who placed the order. |
| **Ship To Address** | Displays the address for the customer awarded the job, as defined in the customer's Customer Maintenance record. You can make changes to the shipping address for the release here. The changes you make are not saved to the Eclipse Customer record and are therefore specific to this job. This is helpful if your customer wants the vendor to ship items directly to a job site. |
| **Display Vendor Instructions** | Select where you would like the vendor instructions you enter or select in the **Vendor Instructions** field to display on the order. |
| **Vendor Instructions** | Enter any information regarding the shipment of the items that you want to include on the order. To select from suggested vendor instructions that you have defined in Eclipse, click the search icon 🔍 next to the field. |
| **Internal Notes** | Enter any notes about the release of items that you want to make but do not want to include in any documentation that goes to your customer or to the vendor. To select from suggested internal notes that you have defined in Eclipse, click the search icon 🔍 next to the field. |

6.  Click **Confirm** to create the Release PO or click **Cancel** to remove your changes and return to the Job Summary page without creating the Release PO.

The system locks the items on the BOM for this vendor, sends the Release PO to the vendor according to the information you entered in step 4, and creates the direct order in Eclipse. You can view the direct order in Eclipse or Solar Eclipse, however, if you need to make a change, you need to use change orders in the Job Management application.

---

**See Also:**

Completing Partial Releases

Creating Hold for Release Purchase Orders

Reserving Purchase Order Number

Managing Purchase Orders and Releases for Jobs Overview

Viewing Vendor Cost, Price, and Transactions for Jobs

# Creating Partial Releases

Your customer might require that items for the job ship to them in smaller quantities than the total required for the job. For example, if the job is a three story apartment building, the contractors might be ready for all the light fixtures for floor one but not for the other two floors. Instead of sending all the fixtures to a site that could be damaged while they wait for installation, you release shipment of only the fixtures required for floor one.

A Release PO indicates to your vendor that they can ship items to your customer and generates a direct order in Eclipse based on the customer and vendor information specified for the job. If you created a Hold for Release PO or a Reserve PO, the system uses that order number to release the material.

You must be assigned the JOB.MGMT.MANAGE.PO authorization key to create purchase orders and releases.

**To create a partial release from a vendor:**

1. Award the job to a customer and finalize the contents on the BOM.

2. Create a Hold for Release PO for the vendor.

3. From the Job Summary menu bar, click **Manage POs** to display the Manage POs and Releases page.

4. In the **Release Now** column for each item, enter the quantity you want to include on the Release PO. and click **Create POs** at the bottom of the page.

5. Select how you want to send the Release PO to the vendor.

6. Complete the following fields for the partial Release PO:

| Field | Description |
|---|---|
| Release Date | Select the date on which you authorize the vendor to send the items to your customer. |
| Require Date | Select the date the customer needs the items on the order. |
| Ship Via | Select the shipping method used to send the items to the customer, such as UPS. |
| Freight Terms | Select how the vendor expects to be paid for freight charges for the order. |
| Release Number | Enter an identifier for the release. For example, if you authorizing your vendor to ship items to your customer in three shipments, you might indicate this is release 1a in the **Release Number** field. The release number can be alpha-numeric |
| Ship To Address | Displays the address for the customer awarded the job, as defined in the customer's Customer Maintenance record. You can make changes to the shipping address for the release here. The changes you make are not saved to the Eclipse Customer record. |

| Field | Description |
|-------|-------------|
| **Vendor Instructions** | Enter any information regarding the shipment of the items that you want to include on the order.<br><br>To select from suggested vendor instructions that you have defined in Eclipse, click the search icon 🔍 next to the field. |
| **Internal Notes** | Enter any notes about the release of items that you want to make but do not want to include in any documentation that goes to your customer or to the vendor. For example, you might have reminders for your staff about the order that you do not want to include in the customer's order documentation.<br><br>To select from internal notes that you have defined in Eclipse, click the search icon 🔍 next to the field. |

7. Click **Confirm** to create the partial Release PO or click **Cancel** to remove your changes and return to the Job Summary page without creating the Release PO.

   After you click **Confirm**, the system locks the items on the BOM for this vendor, sends the Release PO to the vendor according to the information you entered in step 5, and creates the direct order in Eclipse. You can view the direct order in Eclipse or Solar Eclipse, however, if you need to make a change, you need to use change orders in the Job Management application.

---

**See Also:**

Releasing Items from Vendors or from Stock

Creating Hold for Release Purchase Orders

Reserving Purchase Order Numbers

Managing Purchase Orders and Releases  Overview

Viewing Vendor Cost, Price, and Transactions

# Creating Purchase Orders for Engineering Fees

For some of your jobs, you might work with a manufacturer representative when bidding items for large jobs.

Define engineering fees that you are charged for a job directly on the bill of materials (BOM), and create purchase orders for those fees. The system creates the purchase order using the Default Engineering Fee Product you set in the Host Settings or the Job Management Admin control maintenance record.

You must be assigned the JOB.MGMT.MANAGE.PO authorization key to create purchase orders and releases.

**To create a purchase order for an engineering fee for a job:**

1. Award the job to a customer and applying the engineering fees to the bill of materials.

2. In the Job Summary menu bar, click **Manage PO** to display the Manage POs and Releases page.

   The page lists the items on the BOM by vendor, with engineering fees listed at the bottom of the page. Each representative who has an engineering fee entered for the job displays in the Engineering Fees section of the page.

3. Select the **Create PO** check box for each representative for which you want to create a purchase order to pay their engineering fees.

4. Click **Create POs** to display the Create POs page.

5. For each representative, select how you want to send the purchase order.

6. Click **Confirm** to create the engineering fee purchase order or click **Cancel** to remove your changes without creating the purchase order.

   After you click **Confirm**, the system creates the purchase order in the system, and lists it in the Transactions section of the Financial Summary page.

---

**See Also:**

Applying Engineering Fees

Defining Eclipse (Host) Settings

# Splitting Items into Smaller Components for Release, Receiving, and Return

As you are ordering, receiving, or accepting returns for items for a job, you might find that an item you ordered as a single unit is actually shipped as separate components. For example, you enter 100 of Item A on the bill of materials (BOM) for $10.00 each. As the job progresses, you find that Item A is split into three different components, each shipped separately from the vendor because each component is installed at a different stage of construction.

Split an item to create components on the bill of materials (BOM), release the components separately from the vendor, receive the components separately on the Receive Material page, and adjust the cost for each component, as needed.

> **Important:** If you click **Cancel** in the Manage POs and Releases or Receiving Material page after splitting components but before creating purchase orders or payables, the split definitions are also canceled. The cost and sell price are returned to the original amount for the line item.

**To split an item into smaller components:**

1.  From either the Manage POs page or the Receive Material page, click the split item icon next to the line item you want to split to display the Split Item dialog box.

2.  In the **Type** field at the top of the window, modify the generic name for the kind of item needed for the split, if necessary. The name must be unique to BOM for the job.

3.  In the **Description** field at the top of the window, modify the description of the original item if necessary.

    For example, you entered an item on the BOM as Item A to reflect the information on the Item Schedule for the job. As the job progresses, you determine that Item A is broken into two distinguishable parts. As you split the item, rename the original item to better identify it.

4.  For each additional part for the item, enter the following information:

| Field | Description |
|---|---|
| **Qty per/item** | Enter the quantity per item that you want to split. The quantity you enter here is multiplied by the quantity of the original item. |
| **Description** | Enter the description of the new item. |

| Field | Description |
|-------|-------------|
| Cost | Enter the cost per item. The total cost for all the items you are splitting cannot exceed the cost for the original item.<br><br>**Note:** If you are splitting items prior to creating purchase orders and releasing material, if you do not know the cost of the individual piece, leave this field set to $0.00. You can enter the cost for split items with a $0.00 cost when you enter receiving information. At that point the system calculates the dollar balance for the original item. |

To add rows to accommodate additional splits, enter the number of rows you want to add in the **Add more rows** field and click **Add More Rows**.

5. Click **Split Item** to add the new items or click **Cancel** without creating the new items.

---

**See Also:**

Releasing Items from Vendors or from Stock

Receiving Orders for Jobs Overview

# Viewing Purchase Order History for Vendors

As you are creating purchase orders for a job, you can view the past purchase orders for a vendor directly from the Manage PO page.

**To view purchase order history for vendors on a job:**

1. Award the job to a customer and finalize the contents on the BOM.

2. In the Job Summary menu bar, click **Manage PO** to display the Manage POs and Releases page.

   The page lists the items on the BOM by vendor. For more information about the contents of the page, see Managing Purchase Orders and Releases for Jobs Overview.

3. Navigate to the vendor for which you want to view the purchase order history.

4. Click **View PO History** in the vendor's section of the page to display the PO History window for the vendor.

   The PO History window displays the purchase actions made for the vendor, such as Hold for Release purchase orders, and also includes the date and time and who sent the purchase orders.

   Click the purchase order link to display a PDF copy of the document.

# Sending Submittal Documents to Customers

For some jobs, or for some items on a job, you might need to send a submittal document to your customer that contains details about the quantity, type, product descriptions and manufacturers for the items on the bill of materials (BOM) prior to purchasing any products. Use submittals for record keeping purposes or for approval regarding the contents of the BOM prior to ordering items for the jobs from your vendors.

If a vendor has a submittal in a pending status, such as On Submittal or Hold, the item displays with red informational icon 🔴 on the Manage POs page.

**To send a submittal document to a customer:**

1. Create the bill of materials.

2. Select the items you want to include in a submittal document using the check box to the left of each line item.

3. In the Bill of Materials table header, click **More Actions** and select **Submittal Table of Contents** to display the Send Submittal page.

4. In the **Branch** field, select the branch at which the submittal is being created.

5. Select how you want to send the submittal document to the customer.

6. In the **Submittal Mode** field, select one of the following options:

| Option | Description |
|---|---|
| **For Approval** | Select this option to create a submittal document that your customer approves and sends back to you. The document highlights the **For Approval** box on the submittal document. |
| **For Record** | Select this option to create a submittal document that requires no action from your customer. The document highlights the **For Record** box on the submittal document. |

7. In the **Hide Components** field, select whether to list components on the submittal, or to generate the submittal without the components listed.

8. In the **Update Submittal Status** field, select a new status for the items on the BOM.

   When you click Send Submittal, the system updates the status in the Submittal Status field for each item included in the submittal document on the Bill of Materials page.

9. Click **Send Submittal** to create and send the submittal documents.

   The system also creates and saves a copy of the submittal document with the other job document that you can access or resend from the Job Documents page.

   When you receive approval for the items from your customer, go back to the BOM for the job and change the **Submittal Status** field for the item to **Approved**.

# Attaching Specification Sheets to Submittals

For some jobs, or for some items on a job, you might need to send a submittal document with some sort of specification or details sheet to your customer that contains details about the quantity, type, product descriptions and manufacturers for the items on the bill of materials (BOM) prior to purchasing any products.

## Uploading Stock Specification Sheets for all Stock Products

If you have stock products on a BOM, you can attach images and specification sheets to those products in Eclipse by attaching the image to the product record in Product Maintenance. You can then upload all the stock specification sheets for a submittal all at once.

> **Note:** Set the location of your specification sheets in the Job Management Administrator Settings control maintenance record.

**To upload stock specification sheets for all stock products:**

1. Create the bill of materials.

2. Select the items you want to include in a submittal document using the check box to the left of each line item.

3. In the Bill of Materials table header, click **More Actions** and select **Submittal Table of Contents** to display the Send Submittal page.

4. Complete the information for the submittal.

5. In the **Attach Specification Sheets** section of the page, click **Upload Stock Specification Sheets** to attach any specification sheets attached to the product in Product Maintenance in Eclipse.

   The system attaches any document that is attached to a stock product's product record to the line item and includes it with the submittal document.

6. Click **Send Submittal** to create and send the submittal documents.

   The system also creates and saves a copy of the submittal document with the other job document that you can access or resend from the Job Documents page.

## Attaching Specification Sheets for Other Products

For items on the BOM that you do not stock, and that do not have records in Eclipse, you can manually upload a specification sheet to include in the submittal document.

**To attach a specification sheet to a non-stock product or product:**

1. Create the bill of materials.

2. Select the items you want to include in a submittal document using the check box to the left of each line item.

3.  In the Bill of Materials table header, click **More Actions** and select **Submittal Table of Contents** to display the Send Submittal page.

4.  Complete the information for the submittal.

5.  In the **Attach Specification Sheets** section of the page, select the line to which you want to attach a specification sheet.

6.  In the box next to the table, click **Add** and select the document you want to add to the submittal.

7.  Click **Upload** to attach the document to the line item. A check mark displays next to the item when the system completes the attachment process.

8.  Click **Send Submittal** to create and send the submittal documents.

9.  The system also creates and saves a copy of the submittal document with the other job document that you can access or resend from the Job Documents page.

# Entering Shipping Information for Items

Your vendors might provide shipping information, such as tracking numbers, that you want to enter and manage with the other information about the job. View and enter shipping information for line items on the Job Summary page to track what items have gone to your customers. Enter shipping information as you receive it either through shipment notifications or invoices from your vendor. You can enter as many shipments for an item as is needed to accommodate each phase of a job.

Contacts that log in to your Job Management system can also see their job shipment information.

To compile the shipment information in this table in a report to send to your customer, create a Shipping Status Report.

**To enter shipping information for an item:**

1.  After the bid has been finalized, award the job to a customer.

2.  Click **Job Summary** in the menu bar from any page in an active and awarded job.

3.  Click the **Job Status** tab to view the statuses of the items for the job and navigate to the Job Shipments Summary section.

4.  Find the item you want to add to a shipment and select it using the check box next to the item.

    Select multiple items to apply the same shipping information to each.

5.  Enter the following information for the shipment, and click **Add Shipment**.

    | Column | Description |
    | --- | --- |
    | **Est. Ship Date** | The estimated date of shipment. |
    | **Actual Ship Date** | The actual date of shipment. You can come back to this table to complete the field after the shipment has left your warehouse or vendor. |
    | **Shipper** | The freight carrier for the items, such as UPS or FedEx. |
    | **Tracking Info/Pro#** | The shipment tracking number that your freight carrier generates and provides to you. |

    The system updates the shipment table with the information you entered for each of the selected items.

6.  In the **Qty** field for each item in the shipment, enter the quantity of the item included in the shipment. You can ship less than the released quantity for the item at a time.

7.  In the **External Note** field for each item in the shipment, enter any notes that you want to include in the documents for the shipment.

8.  Click **Save** above the table to save your entries.

**To update existing shipment information:**

1. After the bid has been finalized, award the job to a customer.

2. Click **Job Summary** in the menu bar from any page in an active and awarded job.

3. Click the **Job Status** tab to view the statuses of the items for the job and navigate to the Job Shipments Summary section.

4. Find the item for which you want to change the shipment information and select it using the check box next to the item.

   Select multiple items to apply the same shipping information to each.

5. Make the necessary changes to the shipment information and click **Update Shipment(s)** to update the information for each selected item.

6. Click **Save** above the table to save your changes.

**To delete a shipment:**

1. After the bid has been finalized, award the job to a customer.

2. Click **Job Summary** in the menu bar from any page in an active and awarded job.

3. Click the **Job Status** tab to view the statuses of the items for the job and navigate to the Job Shipments Summary section.

4. Find the shipment you want to delete and select it using the check box next to the item.

   Select multiple shipments to delete more than one.

5. Click **Delete Shipment(s)** to remove the shipments information from the list.

6. Click **Save** above the table to save your changes.

---

**See Also:**

Viewing Job Statuses for Awarded Jobs

# Change Orders Overview

After you create a Hold for Release PO or a Release PO for a vendor, the content of the bill of materials (BOM) for that vendor is locked. After the BOM is locked for a vendor, use change orders to make changes, such as quantity or pricing updates, to the items you are ordering from that vendor. Change orders allow you to track materials and dollar changes past the original purchase order for the job.

Change orders provide a way to send pending or approved orders to your customers or your vendors regarding the updates to material required for the job. The Create Change Order page provides a single place where you can see the totals associated with the changes you are making for the job, and to enter the updates to the quantities and the prices for the items on the job.

As you approve change orders, the system adds the orders to the Financial Summary and creates the orders in Eclipse.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders, and the JOB.MGMT.EDIT.STK.COST authorization key to change the cost for stock products on change orders.

Create change orders for the following scenarios:

- Add a new item to the job.
- Change the description of an item.
- Change the quantity or price for a unit-priced item already on the BOM.
- Change the quantity or price for a unit-priced item on the BOM at a different price.
- Change the quantity or price for a lot-priced items already on the BOM.
- Add an item priced as a unit extension to a lot.
- Add an item priced under a new lot.

---

**See Also:**

Change Order Totals

Unit-Priced Item Change Orders Workflow

Change Orders for Lot-Priced Items Workflow

# Adding New Items to the Bill of Materials for Vendors with Created POs

As a job progresses, you might need to add additional items to the bill of materials (BOM). If you are ordering new items that were not on the original BOM from a new vendor who does not have items on the BOM, or from a vendor for whom you have not created a Hold for Release PO or a Release PO, you can add the item directly to the BOM and do not need to use a change order.

If the job requires a new item and you are ordering that item from a vendor already on the job for whom you have created a Hold for Release PO or a Release PO, use a change order to add the item to the BOM for the job.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To add a new item to the BOM using a change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. In the blank field on left side of the change order toolbar, enter the number of rows you want to add and click the add icon .

   The system adds the blank rows to the bottom of the table.

5. Complete the column entries for each product you are adding.

6. Preview and confirm the change order and send it to your customers and vendors, as necessary.

   - Previewing and confirming pending change orders.

   - Previewing and confirming approved change orders.

---

**See Also:**

Change Orders Overview

Change Order Totals

# Making Changes to Item Descriptions

As a job progresses, you might need to update the description of items on the bill of materials (BOM). If the job requires you to change an item's description and that item is from a vendor for whom you have created a Hold for Release PO or a Release PO, use a change order to update the item's description.

If you have not created purchase orders for items from the vendor for the item, or created purchase orders for stock items that you need to change, make the item description items directly on the BOM.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To make a change to an item's description:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. In the **Description** field, update the brief statement that describes the product and its associated item type.

5. Preview and confirm the change order and send it to your customers and vendors, as necessary.

   - Previewing and confirming pending change orders.

   - Previewing and confirming approved change orders.

---

**See Also:**

Change Orders Overview

Adding New Items to the Bill of Materials for Vendors with Created POs

# Making Price Updates to Partially Received Items

As a job progresses, you might need to update the price for items that are partially received. After you receive a portion of an item, the pricing for the original order quantity is locked. However, you can copy the line item to make the changes you need.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To make a price update to a partially received item:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click New to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. In the **Change Qty** field for the item with the partially received quantity, decrease the quantity by the number of the item to which you want to apply a new price.

   For example, the original quantity for the item ordered was 10, and you have received 5 at one price. You want to change the price for the remaining 5 that have not been received. Enter **-5** in the **Change Qty** field.

5. Click the copy icon ⧉ next to the line item you updated in step 4 to add a line item with the same vendor, description, unit/lot distinction, cost, and price information.

   The system adds a copy of the item directly below the item you copied, and enters the type as the type from the original, plus "-A." For example, if the original type was L-8, the type for the copied item is L-8-A. The system also populates the vendor and description with that of the original. If you copy the item again, the second copied item is L-8-B.

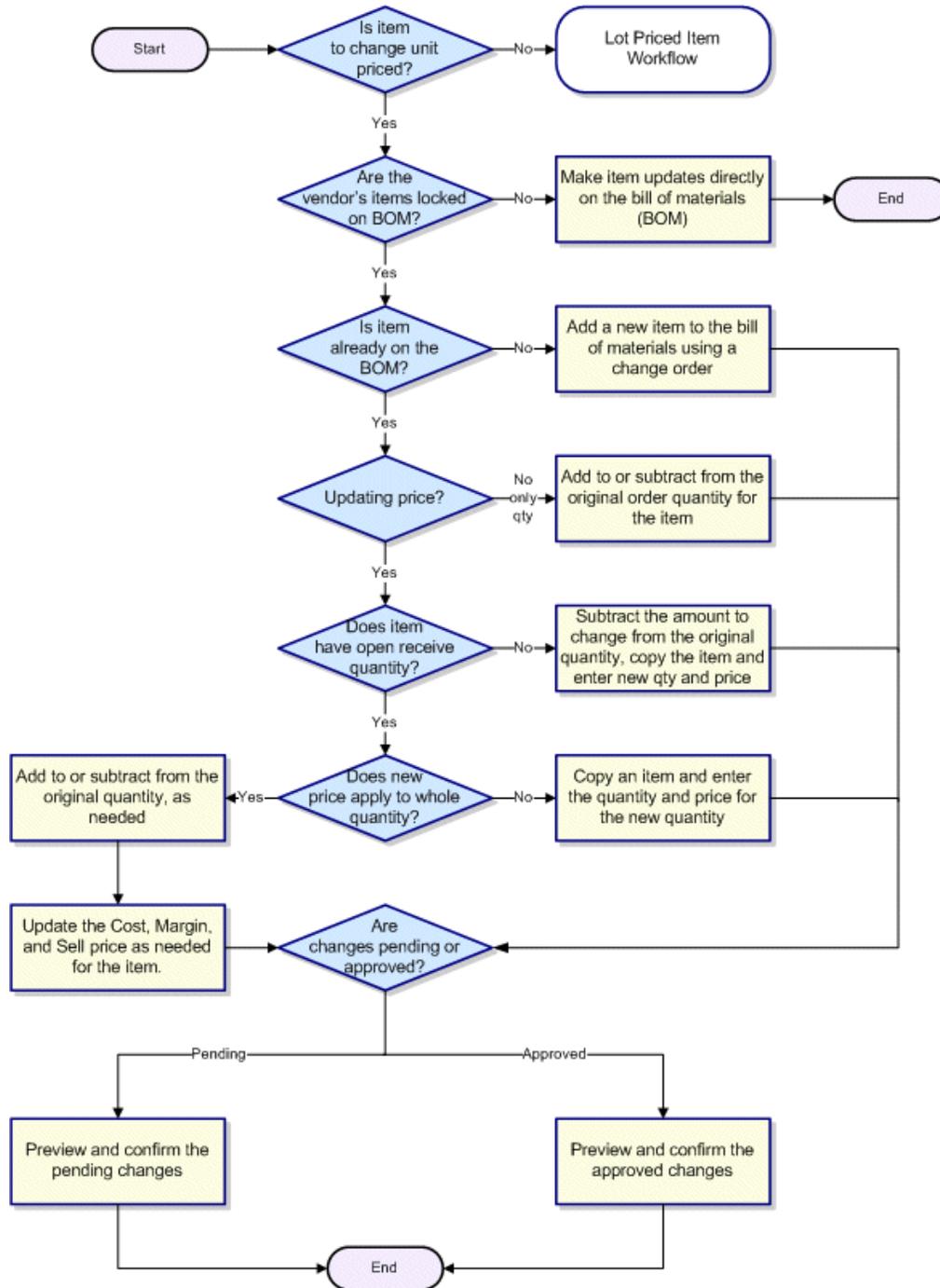   The system also copies any components associated with the item.

6. Complete the column entries for the new quantity and new price.

7. Preview and confirm the change order and send it to your customers and vendors, as necessary.

   - Previewing and confirming pending change orders.

   - Previewing and confirming approved change orders.

---

**See Also:**

Change Orders Overview

Adding New Items to the Bill of Materials for Vendors with Created POs

# Making Changes to Unit-Priced Items Workflow

| | | |
|---|---|---|
| **Start** → | **Is item to change unit priced?** —No→ | Lot Priced Item Workflow |
| | ↓ Yes | |
| | **Are the vendor's items locked on BOM?** —No→ | Make item updates directly on the bill of materials (BOM) → **End** |
| | ↓ Yes | |
| | **Is item already on the BOM?** —No→ | Add a new item to the bill of materials using a change order |
| | ↓ Yes | |
| | **Updating price?** —No only qty→ | Add to or subtract from the original order quantity for the item |
| | ↓ Yes | |
| | **Does item have open receive quantity?** —No→ | Subtract the amount to change from the original quantity, copy the item and enter new qty and price |
| | ↓ Yes | |
| Add to or subtract from the original quantity, as needed ←Yes— | **Does new price apply to whole quantity?** —No→ | Copy an item and enter the quantity and price for the new quantity |
| ↓ | | |
| Update the Cost, Margin, and Sell price as needed for the item. → | **Are changes pending or approved?** | |
| | Pending / Approved | |
| Preview and confirm the pending changes | | Preview and confirm the approved changes |
| | ↓ **End** ↓ | |

# Changing Unit-Priced Items Already on the Bill of Materials

After you create a Hold for Release PO or a Release PO for a vendor, the content of the bill of materials (BOM) for that vendor is locked. After the BOM is locked for a vendor, use change orders to make changes, such as quantity or pricing updates, to the items you are ordering from that vendor.

**Important:** If the job requires more of an item that is already on the BOM, but the vendor is charging you a different amount than the original quantity ordered, or you want to sell the item at a different sell price to your customer, add a new line to the change order and enter the updated quantity on the new line. For more information, see Creating Change Orders for Unit Priced Items on the Bill of Materials at Different Prices.

If you have received any quantity of an item, you can no longer make changes to the cost or sell price for that item.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

If you have created purchase orders for partial quantities, you can make changes to the quantities that have yet to be released.

**To change a unit-priced item already on the bill of materials:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. In the **Change Qty** field for each unit-priced item you want to update, do one the following. The current quantity displays in the **Current Total Qty** field.

| To.. | Do this.. |
|---|---|
| increase the quantity of an item | enter the additional number of items you want to add to the job. For example, if the current total quantity is 25, and the job now requires 30, enter **5** in the **Change Qty** field. |
| decrease the quantity of an item | enter a negative number to subtract that number from the current total quantity. For example, if the current total quantity is 25, and the job only requires 20, enter **-5** in the **Change Qty** field.<br><br>You cannot decrease the quantity by more than the open receive quantity. For example, if you originally ordered 10 of an item and have received 5 of that item, you now have an open receive quantity of 5. You cannot decrease the quantity by more than 5. |

The item table on the Create Change Order page displays all items on the BOM. Items that can still be updated on the BOM are disabled.

5. In the **Change Status** field, select one of the following change order statuses:

   - **Pending** - Creates the change order without making updates to the BOM. Items with a pending change order status display in the Job Summary with an icon indicating that the item has a change order waiting approval.

   - **Approved** - Creates the change order, updates the BOM with the new information and creates a Hold for Release PO for the items. Items on an approved change order are available for release from the vendor. For more information about releasing the new items, see Releasing Items for Jobs.

6. Update the cost, margin, and sell information for the item, if necessary.

   If you make changes to the pricing for the item, the new pricing information applies to the entire quantity of that item. For example, you are creating a change order for 10 more of Item A. The job originally only called for 25, but now the job requires 35. Because you are ordering more of the item, the vendor reduces the cost of each item from $20.00 each to $19.50 each. Enter $19.50 in the **Cost** field to apply the new cost to all 35 of the item.

   If you want to apply a different cost or a different sell price to the additional quantity you are adding for an item then the original quantity, copy the item so you can enter separate pricing.

7. Preview and confirm the order:

   - Previewing and Confirming Pending Change Orders

   - Previewing and Confirming Approved Change Orders

---

**See Also:**

Changing Lot-Priced Items Already on the Bill of Materials

Adding New Items to the Bill of Materials for Vendors with Created POs

# Making Changes to Unit-Priced Items on the Bill of Materials at Different Prices

After you create a Hold for Release PO or a Release PO for a vendor, the content of the bill of materials (BOM) for that vendor is locked. After the BOM is locked for a vendor, use change orders to make changes, such as quantity or pricing updates, to the items you are ordering from that vendor.

If your vendor is charging you a different price for the additional items than you paid for the original quantity, or you want to charge your customers a different price than you did for the original quantity, use the following procedure.

If the vendor is charging you the same price as the original items, see Creating Change Orders for Unit Priced Items Already on the Bill of Materials.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To create a change order for a unit-priced item at a different price than the original order:**

1.  In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2.  Complete the required fields indicated in bold at the top of the page regarding the change order.

3.  Complete the optional fields at the top of the page, as necessary.

4.  Click the copy icon  next to the line item you are adding at a different price.

    The system adds a copy of the item directly below the item you copied, and enters the type as the type from the original, plus "-A." For example, if the original type was L-8, the type for the copied item is L-8-A. The system also populates the vendor and description with that of the original.

    The system also copies the components associated with the item.

5.  In the **Unit/Lot** field, select **Unit** to indicate the item is unit priced.

6.  In the **Change Qty** field enter the number of the item you want to add to the job.

7.  In the **Change Status** field, select one of the following change order statuses:

    *   **Pending** - Creates the change order without making updates to the BOM. Items with a pending change order status display in the Job Summary with an icon indicating that the item has a change order waiting approval.

    *   **Approved** - Creates the change order, updates the BOM with the new information and creates a Hold for Release PO for the items. Items on an approved change order are available for release from the vendor. For more information about releasing the new items, see Releasing Items for Jobs.

8. Enter the cost, margin, and sell information for the item.

9. Preview and confirm the order:

- Previewing and Confirming Pending Change Orders

- Previewing and Confirming Approved Change Orders

---

**See Also:**

Changing Unit-Priced Items Already on the Bill of Materials

# Making Changes to Lot-Priced Items Workflow

**Start**

**Is the item to change or add lot priced?** —No→ **Unit Priced Items Workflow**

Yes ↓

**Are the vendor's items locked on BOM?** —No→ **Make item updates directly on the bill of materials (BOM)** → **End**

Yes ↓

**Is item already on the BOM?** —No→ **Add a new lot priced item to the bill of materials using a change order**

Yes ↓

**Does item have open receive quantity?** —No→ **Subtract the amount to change from the original quantity, copy the item and enter new qty and price**

No ↓

**Is item part of an existing lot?** —No→ **Add or copy an item, enter quantity and new lot price**

Yes ↓

**Changing lot price?** —No only qty→ **Add to or subtract from the original order quantity for the item**

Yes ↓

**Item priced as extension to a lot?** —No→ **Update the quantity and price information for the item, as needed.**

Yes ↓

**Add or copy an item, enter quantity, select existing lot, select Unit Price Extend, and enter price**

↓

**Are changes pending or approved?**

←Pending— **Preview and confirm the pending changes**

—Approved→ **Preview and confirm the approved changes**

↓ **End**

# Changing Lot-Priced Items Already on the Bill of Materials

After you create a Hold for Release PO or a Release PO for a vendor, the content of the bill of materials (BOM) for that vendor is locked. After the BOM is locked for a vendor, use change orders to make changes, such as quantity or pricing updates, to the items you are ordering from that vendor.

If your vendor is updating the *total* lot price to accommodate your change order, follow the procedure below to make the item updates and the updates to the total lot price.

> **Note:** If your vendor is creating a new lot price for only the items you are adding, or you are adding items to the job that are priced using a different lot or are from a new vendor, see Adding New Items to the Bill of Materials for Vendors with Created POs. If your vendor is already charging you a lot price, and they are charging you a unit price for the additional items you are adding to the job, see Creating Change Orders for Items Priced as Unit Extensions to Lots.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To change a lot-priced item already on the BOM:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. In the **Change Qty** field for each lot-priced item you want to update, do one of the following:

| To.. | Do this.. |
|------|-----------|
| increase the quantity of an item | Enter the additional number of items you want to add to the job. For example, if the current total quantity is 25, and the job now requires 30, enter **5** in the **Change Qty** field. |
| decrease the quantity of an item | Enter a negative number to subtract that number from the current total quantity. For example, if the current total quantity is 25, and the job only requires 20, enter **-5** in the **Change Qty** field. <br><br>You cannot decrease the quantity by more than the open receive quantity. For example, if you originally ordered 10 of an item and have received 5 of that item, you now have an open receive quantity of 5. You cannot decrease the quantity by more than 5. |

The item table on the Create Change order page displays all items on the BOM. Items priced in a lot highlight when you hold the mouse cursor over them. Items that can still be updated on the BOM are disabled.

5. In the **Change Status** field, select one of the following change order statuses:

- **Pending** - Creates the change order without making updates to the BOM. Items with a pending change order status display in the Job Summary with an icon indicating that the item has a change order waiting approval.

- **Approved** - Creates the change order, updates the BOM with the new information and creates a Hold for Release PO for the items. Items on an approved change order are available for release from the vendor. For more information about releasing the new items, see Releasing Items for Jobs.

6. Update the cost, margin, and sell information for the item, if necessary.

If you make changes to the pricing for the item in the lot, the new pricing information applies to the entire lot. For example, you are creating a change order for 10 more of Item A, which is part of a lot price of $5000 from your vendor. The lot pricing contains five other items. If you update the pricing information for Item A, the pricing information for each item in the lot also updates to what you enter for Item A.

If you are updating the lot price to include additional quantities, enter the difference between the old lot price and the new lot price. For example, if the original lot price was $5000 and you are creating a change order for additional quantities that make the new lot price $6000, enter $1000.

7. Preview and confirm the order:

- Previewing and Confirming Pending Change Orders

- Previewing and Confirming Approved Change Orders

---

**See Also:**

Adding Items Priced as Unit Extensions to Lots

Adding Items in a New Lot Price

Making Changes to Lot-Priced Items Workflow

# Adding Items Priced as Unit Extensions to Lots

After you create a Hold for Release PO or a Release PO for a vendor, the content of the bill of materials (BOM) for that vendor is locked. After the BOM is locked for a vendor, use change orders to make changes, such as quantity or pricing updates, to the items you are ordering from that vendor.

It is possible that you are ordering items from a vendor with whom you have a lot pricing agreement for the job. However, your vendor might choose to charge you per unit for the additional items you are ordering, as an extension to the original lot price. If your vendor provides you a price per unit for the additional items you are adding to the job, use unit price extensions to add the price of the new items you are ordering from that vendor to the total lot price. If the vendor increases the lot price to include the new items, update the lot price of the item.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To add an item priced as a unit extension to a lot:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. Do one of the following:

| To... | Do this... |
|---|---|
| add a blank row to which to add the item | enter the number of rows you want to add in the blank field on the left side of the change order table toolbar and click the add icon 🗁. <br><br>The system adds the blank rows to the bottom of the table. Enter the type, vendor, and product description for the item. |
| copy an existing line item | click the copy icon 🗍 next to the line item you want to copy. <br><br>The system adds a copy of the item directly below the item you copied, and enters the type as the type from the original, plus "-A." For example, if the original type was L-8, the type for the copied item is L-8-A. The system also populates the vendor and description with that of the original. <br><br>The system also copies the components associated with the item. |

   The item table on the Create Change order page displays all items on the BOM. Items priced in a lot highlight when you hold the mouse cursor over them. You can also identify lot-priced items by the Lot name in the **Unit/Lot** field. Items that can still be updated on the BOM are disabled.

5. In the **Unit/Lot** field, select the lot to which the product is an extension.

6. In the **Change Qty** field, enter the number of the item you want to add to the job.

7. In the **Change Status** field, select one of the following change order statuses:

   - **Pending** - Creates the change order without making updates to the BOM. Items with a pending change order status display in the Job Summary with an icon indicating that the item has a change order waiting approval.

   - **Approved** - Creates the change order, updates the BOM with the new information and creates a Hold for Release PO for the items. Items on an approved change order are available for release from the vendor. For more information about releasing the new items, see Releasing Items from Vendors or from Stock.

8. Select **Unit Price Extend** and enter the cost, margin, and sell information for the item.

9. Preview and confirm the order:

   - Previewing and Confirming Pending Change Orders

   - Previewing and Confirming Approved Change Orders

---

**See Also:**

Changing Lot-Priced Items Already on the Bill of Materials

Adding Items in a New Lot Price

Making Changes to Lot-Priced Items Workflow

# Adding Items in a New Lot Price

After you create a Hold for Release PO or a Release PO for a vendor, the content of the bill of materials (BOM) for that vendor is locked. After the BOM is locked for a vendor, use change orders to make changes, such as quantity or pricing updates, to the items you are ordering from that vendor.

If your vendor is creating a new lot price for only the items you are adding, or you are adding items to the job that are priced using a different lot or are from a new vendor, see the procedure below.

> **Note:** If your vendor is already charging you a lot price, and they are charging you a unit price for the additional items you are adding to the job, see Creating Change Orders for Items Priced as Unit Extensions to Lots. If the items are already on the BOM and the vendor is changing the total lot price to accommodate your change order, see Creating Change Orders for Lot-Priced Items Already on the Bill of Materials.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To add an item in a new lot price:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Complete the required fields indicated in bold at the top of the page regarding the change order.

3. Complete the optional fields at the top of the page, as necessary.

4. Do one of the following:

| To... | Do this... |
|---|---|
| add a blank row so you can add the item | enter the number of rows you want to add in the blank field on the left side of the change order table toolbar and click the add icon. <br><br> The system adds the blank rows to the bottom of the table. Enter the type, vendor, and product description for the item. |
| copy an existing line item | click the copy icon next to the line item you want to copy. <br><br> The system adds a copy of the item directly below the item you copied, and enters the type as the type from the original, plus "-A." For example, if the original type was L-8, the type for the copied item is L-8-A. The system also populates the vendor and description with that of the original. <br><br> The system also copies the components associated with the item. |

The item table on the Create Change order page displays all items on the BOM. Items priced in a lot highlight when you hold the mouse cursor over them. Items that can still be

updated on the BOM are disabled to indicate that you do not need to create a change order for those items.

5.  In the **Unit/Lot** field, select **New Lot**, enter the name of the new lot in the displayed field, and click **OK**.

6.  In the **Change Qty** field enter the number of the item you want to add to the job.

7.  In the **Change Status** field, select one of the following change order statuses:

-   **Pending** - Creates the change order without making updates to the BOM. Items with a pending change order status display in the Job Summary with an icon indicating that the item has a change order waiting approval.

-   **Approved** - Creates the change order, updates the BOM with the new information, and creates a Hold for Release PO for the items. Items on an approved change order are available for release from the vendor. For more information about releasing the new items, see Releasing Items from Vendors or from Stock.

8.  Enter the cost, margin, and sell information for the item.

9.  Preview and confirm the order:

-   Previewing and Confirming Pending Change Orders

-   Previewing and Confirming Approved Change Orders

---

**See Also:**

Changing Lot-Priced Items Already on the Bill of Materials

Adding Items Priced as Unit Extensions to Lots

Making Changes to Lot-Priced Items Workflow

# Previewing and Confirming Pending Change Orders

After you enter the change order information, indicate to whom and how you want to send the change order prior to confirming its creation. The system does not create the change order or the associated Hold for Release PO for approved change orders until you preview and confirm it.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

Pending change orders print as Change Order Quotes.

**To preview and confirm a pending change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Enter the changes you want to make to the BOM for the job.

3. At the bottom of the page, indicate to whom you want to send the change order document:

   - **Suppress notification to vendor** - Select this check box to create a change order that is not sent to the vendor.

   - **Suppress notification to customer** - Select this check box to create a change order that is not send to the customer.

   Select both check boxes to create a change order without sending notification to either the vendor or the customer. For example, if you noticed an error on the original BOM for the job, and want to correct it internally, select both the check boxes to create an internal only change order. The change order document is created and saved your document list with a "Suppress" watermark.

4. Click **Preview Change Order** to display the Send Change Order page, or click **Cancel** to return to the Job Summary page without creating a change order.

   The Send Change Order page displays the changes at the top of the page. For any change orders that have an Approved Status, the system also displays the changes by vendor. For more information about processing Approved change orders, see Previewing and Confirming Approved Change Orders.

5. Select how you want to send the change order to the vendor or customer.

   If you selected both suppress notification options in step 3, the send options are not available because you are not sending the change order document to either your customer or your vendor. To change your notification selections, deselect **Suppress Notification**.

6. To exempt the customer from incoming freight charges for the changes, select **Yes** in the **Freight In Exempt** field.

   To pass the freight chargers on to the customer for the changes, select **No** in the **Freight In Exempt** field.

7. To include special shipping instructions on the purchase order, enter the instructions in the **Shipping Instructions** field, and then select whether to include the instructions before the line items on the order, after the line items, or in both places.

8. Click **Send Change Order** to create the change order or click **Cancel** to return to the Create Change Order page without creating change orders.

   After you click **Send Change Order**, the system adds the change order to the Job Summary, but does not update the BOM.

   If you created the change order using the same customer PO number as the original job, the system creates a Hold for Release PO that is labeled as a change order. If you created the change order using a new customer PO number, the system creates a standard Hold for Release PO.

**See Also:**

Previewing and Confirming Approved Change Orders

Change Orders Overview

# Previewing and Confirming Approved Change Orders

After you enter the change order information and change the status of the item to Approved, indicate to whom and how you want to send the change order prior to confirming its creation. The system does not create the change order or the associated Hold for Release PO for approved change orders until you preview and confirm it.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To preview and confirm an approved change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page and click **New** to display the Create Change Order page.

2. Enter the changes you want to make to the BOM for the job.

3. At the bottom of the page, indicate to whom you want to send the change order document:

   - **Suppress notification to vendor** - Select this check box to create a change order that is not sent to the vendor.

   - **Suppress notification to customer** - Select this check box to create a change order that is not send to the customer.

   Select both check boxes to create a change order without sending notification to either the vendor or the customer. For example, if you noticed an error on the original BOM for the job, and want to correct it internally, select both the check boxes to create an internal only change order. The change order document is created and saved your document list with a "Suppress" watermark.

4. Click **Preview Change Order** to display the Send Change Order page, or click **Cancel** to return to the Job Summary page without creating a change order.

   The Send Change Order page displays the changes at the top of the page. For any change orders that have an Approved Status, the system also lists the changes grouped by vendor.

5. For each vendor, do the following:

| To... | Do this.. |
|---|---|
| send the document to the vendor by fax, email, or by printed document | select how you want to send the change order to the vendor.<br><br>If you selected both suppress notification options in step 3, the send options are not available because you are not sending the change order document to either your customer or your vendor. To change your notification selections, deselect **Suppress Notification**. |
| send the changes on the original purchase order number for the vendor | select **Original PO**. |

| To... | Do this.. |
|-------|-----------|
| send the change on a new purchase order number to the vendor | select the **New PO** option. The system creates the **Hold for Release PO** under a new purchase order number in Job Management, such as the original PO number with a suffix. The system does not create a new order generation unless all the original items on the order have been received.<br><br>The **New PO** option is not available if you have added a vendor and have not yet sent them a purchase order for the job. |
| generate a Release PO and allow the vendor to release the material on the change order immediately | select the **Immediately Release Material** check box. |
| include special shipping instructions on the purchase order | enter the instructions in the **Shipping Instructions** field and select whether you want to include the before the line items on the order, after the line items, or in both places. |

6. Click **Send Change Order** to create the change order and the Hold for Release PO or click **Cancel** to return to the Create Change Order page without creating change orders.

If you created the change order using the same purchase order number as the original job, the system creates a Hold for Release PO that is labeled as a change order. If you created the change order using a new purchase order number, the system creates a standard Hold for Release PO.

# Viewing, Editing, and Canceling Pending Change Orders

As you create change orders, you can set the status to Pending to indicate in the system that the change order is in a waiting status, either for approval from the customer or from your vendor. If there are pending change orders, the change order icon displays in the Pending Change Order field for the vendor on the Job Summary page.

You can view and make changes to a pending change order at any time. You can also cancel a pending change order.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To view and edit a pending change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page.

   The page lists the pending change orders.

2. Click the **Change Order** number to display the Finalize Change Order page that contains the change order information.

   The page displays the header information, the change order totals, and the items on the pending order.

3. Make any necessary updates to the required fields, optional fields, or the items listed in the change order table.

4. Preview and confirm the change order:

   - Previewing and Confirming Pending Change Orders

   - Previewing and Confirming Approved Change Orders

**To cancel an entire pending change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page.

   The page lists the pending change orders.

2. Click the icon in the **Cancel** field next to the change order you want to cancel.

   If you are viewing the contents of a change order, click **Cancel this Change Order** at the top of the Finalize Change Order page to cancel the order.

**To cancel changes to an item on a change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page.

   The page lists the pending change orders

2. Click the **Change Order** number to display the Finalize Change Order page that contains the change order information.

3. In the change order table, select **Cancel** in the **Change Status** field for the item you want to cancel.

4. Preview and confirm the change order:

   - Previewing and Confirming Pending Change Orders

   - Previewing and Confirming Approved Change Orders

**More Options When Viewing Pending Change Orders**

The Pending Change Orders page also offers the following options for pending orders:

| To... | Do This... |
|---|---|
| resend a change order document | click the icon in the **Resend** field for the change order you want to resend to your customer or vendor. Enter the send to information and click **Send**. |
| enter a follow up date | in the **Follow Up Date** field for the change order, click the calendar icon 🔟 and select the date on which you want to follow up on the change order. The follow up dates display in the My Deadlines area of the Home page. |

**See Also:**

Approving Pending Change Orders

# Approving Pending Change Orders

Change the status of pending change orders to Approved after you receive the required approvals from your customer or vendor. Approving a change order creates a Hold for Release PO for the items from the vendor. For more information about releasing items after they are approved, see Releasing Items for Jobs.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

You must be assigned the JOB.MGMT.CHANGE.ORDER authorization key to create and approve change orders.

**To approve a pending change order:**

1. In the Job Summary menu bar, click **Change Orders** to display the Pending Change Orders page..

   The page lists the pending change orders.

2. Click the **Change Order** number you want to approve to display the Finalize Change Order page for that order.

   The page displays the header information, the change order totals, and the items on the pending order.

3. Make any necessary updates to the required fields, optional fields, or the items listed in the change order table.

4. Do one of the following:

   | To.. | Do this.. |
   |---|---|
   | approve a single item | in the **Change Status** field, select Approved. |
   | approve all the pending items | in the change order toolbar, click the approved icon ✅ to change the status of all the pending items to **Approved**. |

5. Preview and confirm the approved change orders.

---

**See Also:**

Change Orders Overview

# Change Order Totals

As you enter change orders for jobs, the system provides job total information directly on the Create Change Order page. Use this information to get a real-time view of how the changes you are making to a job are affecting your bottom line.

The system displays the cost, price, and gross profit percentage for each vendor on the job and for items coming from stock.

| Table | Description |
|---|---|
| **Current Job Total** | The job totals as it stands prior to the changes to the job listed in the change order table. The totals in the table remain unchanged as you make changes to the quantities and totals for the job. |
| **Change Total** | The totals for the changes currently displayed in the change order table. As you make updates to the quantities and totals in the change order table, the system recalculates the cost, price, and gross profit percentage for the changes for each vendor in this table. |
| **New Job Total** | The current job total plus the changes in the change order table. As you make updates to the quantities and totals in the change order table, the system recalculates the new cost, price, and gross profit for each vendor in this table. |

**See Also:**

Change Orders Overview

# Receiving Orders Overview

Entering invoice details from your vendor and entering what items were received for a job creates payables and invoices for the items ordered, and allows you to track the quantities you have received for the job. Payables in Eclipse allow your accounting staff to write checks to vendors for items that you ordered. Invoices allow you to send billing information to your customers for the items for the job.

Reconciling the invoices from your vendors to purchase orders gives you the opportunity to compare the information, most specifically the amount payable, between the orders and the invoices, before approving the invoice for payment.

Job Management provides the flexibility of creating payables in Job Management or in Eclipse A/P Entry, whichever fits your business processes, personnel, or a particular job. As you enter information in either place, the Financial Summary for the job within Job Management updates to include the customer invoices and payments, and the vendor invoices and payments for a job. For more information about how Job Management and Eclipse interact during the receiving process, see Eclipse Transactions for Receiving.

You must be assigned the JOB.MGMT.RECEIVE.MATERIAL authorization key to receive orders.

See the following topics to enter receiving information for a job:

- Receiving and Reconciling Orders
- Splitting Line Items on Jobs
- Viewing and Searching Invoices with Open Quantities for Receiving

---

**See Also:**

Eclipse Transactions Created for Receiving

# Viewing and Searching for Invoices with Open Quantities for Receiving

If you deal with a large number of jobs at your site, you might have a primary person who enters invoices in the system for you, or you might choose to enter all your receiving for multiple jobs at one time. Job Management provides a way to efficiently search for invoices in the system that still have quantities open to receive.

Use this function if you have multiple invoices that were entered in Eclipse and now you want to enter the received quantities for each invoice in Job Management. This function is also helpful if you are entering receiving information across multiple jobs at one time.

You must be assigned the JOB.MGMT.RECEIVE.MATERIAL authorization key to receive orders.

**To search for an open invoice for receiving:**

1. From any page in Job management, click **Home** in the menu bar to display the Home page, and then click **Receive** in the submenu bar to display the Open Receiving page.

   The page displays all the open invoices in the table sorted by invoice date.

   If you are entering receiving information for a single job, view the job and click **Receive Material** in the Job Summary menu bar.

2. Use one or more of the following fields to search for an invoice:

| Field | Description |
|---|---|
| **Job Name** | Enter all or part of the name of the job to display jobs with the text you enter in the job name. |
| **Job ID** | Enter the system-assigned identification number for the job. |
| **Invoice Number** | Enter all or part of an invoice number to display only open invoices containing that number. |
| **Price Br** | Select a branch to display only invoices for orders that use that branch for pricing. |
| **G/L Sales Source** | Select the profit center that sold the product, for example Outside Sales or Counter Sales to display only open invoices for that sales source. |
| **Vendor** | Enter a vendor to display only the open invoices for that vendor. |
| **Project Mgr.** | Enter the name of the project manager to display only jobs to which that user is assigned as the project manager. |
| **Order #** | Enter all or part of the order number associated with the invoice to display only open invoices that contain that order number. |

As you enter criteria in the above fields, the open invoices that match the criteria display.

**To view an open invoice for receiving:**

1. From any page in Job management, click **Home** in the menu bar to display the Home page, and then click **Receive** in the submenu bar to display the Open Receiving page.

2. In the open invoices table, click the job ID associated with the invoice to open the Receive Material page where you can enter the received quantities.

---

**See Also:**

Receiving and Reconciling Orders

Eclipse Transactions Created for Receiving

# Receiving and Reconciling Orders

Entering invoice details from your vendor and entering what items are received for a job creates payables and invoices for the items ordered. Payables in Eclipse allow your accounting staff to write checks to vendors for items that you ordered, and creates invoices to send to your customers for the job.

You must be assigned the JOB.MGMT.RECEIVE.MATERIAL authorization key to receive orders.

> **Note:** If you open a payable in Eclipse that you created in Job Management, the job number displays on the payable to help identify which job it relates to.

**To receive and reconcile an order:**

1. After the items are released for shipping and you receive invoices from your vendor, in the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Do one of the following to create or select a payable:

| To... | Do this... |
|---|---|
| create a new payable for a new invoice | From the **Select Payable** field, select **New**. From the **Vendor** field, select the vendor for which you are entering receiving information. |
| enter quantities received against an invoice entered in Eclipse A/P entry | From the **Select Payable** field, select the payable for when you want to enter receiving information. The system displays the information for the payable as it was entered in Eclipse. |

3. Enter the remaining invoice information on the left side of the Receive Material page, as necessary.

| Field | Description |
|---|---|
| **A/P Branch** | Enter the branch that is paying the invoice. This branch does not have to correspond to the branch that received the material. <br><br> The A/P branch defaults to the pricing branch for the job when you are entering a new invoice. |
| **P/O Number** | Select the order number to which you are reconciling received quantities. |
| **Invoice Number** | Enter the identifying number on the invoice you received from the vendor. <br><br> **Note:** This field is not case sensitive. If you enter **#ab123** and **#AB123** already exists, the system treats it as a duplicate invoice. |
| **Invoice Date** | Enter the date on the invoice you received from the vendor. The field defaults to today's date. |
| **Due Date** | The system populates this field based on the payment terms assigned to the vendor and the date in the **Invoice Date** field. Select a different date, if necessary. |

| Field | Description |
|---|---|
| **Pay On Date** | The system populates this field based on the payment terms assigned to the vendors and the invoice date. You can change the pay on date for a payable in either an open or closed accounting period, but only when the payable has not been paid.<br><br>The due date and the pay on date are the same and are the dates necessary to qualify for any discounts. |
| **Terms** | Enter the payment terms code for the invoice. The terms code indicates payment dates, discounts, or services charges negotiated between you and the vendor. |
| **Invoice Amount** | Enter the total amount due on the invoice. The total amount includes any freight or tax amounts, and is the total amount before any vendor discounts. |
| **Freight** | (Optional) Enter the freight amount listed on the invoice. The system reduces the Reconcile Amount by the dollar amount you enter here.<br><br>To include the freight charges in the calculation of the discount amount, set the Include Freight in Discount Calculation For Payables control maintenance record to **Yes**. |
| **Tax** | (Optional) Enter the tax amount on the invoice if you want to track the tax you are charged. Otherwise, entering the tax is not necessary. The system reduces the Reconcile Amount by the dollar amount you enter here. |
| **Deductions** | (Optional) Enter the amount of any deductions on the invoice. The system reduces the Reconcile Amount by the dollar amount you enter here. Click the deductions icon to enter a reason for the deduction from the payment amount. |
| **Discount Amount** | (Optional) The system populates this field with the discount allowed if payment is made by the invoice due date. This discount is based on the payment terms assigned to the ship-from vendor, the invoice date, and the invoice amount less freight and tax. You can override the amount, if necessary.<br><br>Move your cursor over the information icon to view the discount percent. A truck icon below the field indicates that freight is included in the discount calculation. |
| **Pro/Tracking#** | (Optional) Select the shipment tracking number that the freight carrier generated and provided to you for the order. To add a new tracking number, click the plus icon , enter the number, and click **OK**. |
| **Reconcile Amount** | (View Only) The invoice amount minus any freight, tax, discounts or other deductions listed in the **Freight**, **Tax**, and **Deductions** fields. This is the total amount billed for actual products listed on the invoice. |
| **Receive Amount** | (View Only) The total extended cost of the items you are reconciling to the invoice. Enter the quantity received of each item from the vendor in the **Receive NOW** fieldin the Receiving section of the page. This field updates to reflect the new dollar amount as you enter the received quantity. |
| **G/L Amount** | TBD |

| Field | Description |
|-------|-------------|
| **Difference** | (View Only) The difference between the reconcilable amount on the invoice in the **Reconcile Amount** field and the total received amount listed in the **Receive Amount** field. If the difference is a negative dollar amount, it indicates that the amount on the invoice is less than the amount that you have received. |
| **Allowed Variance** | (View Only) The dollar amount or percentage of the total that determines whether the system automatically approves the invoice for payment. This amount applies to differences either over or under the extended received amount for the invoice.<br><br>**Note:** If the vendor record in Eclipse does not contain an over/short dollar amount or percentage in the **Over/Short%** and **Over/Short$** fields, the system uses the maximum variance set in the A/P Over/Short Maximum Parameter control maintenance record.<br><br>For example, the vendor record in Eclipse is set to a variance of $20. This variance means that if the extended received amount is $900 and the vendor's invoice amount, as entered in the **Invoice Amount** field is between $880 and $920 ($20 above or below the received amount) the system approves the payment. However, if the invoice amount is less than $880 or more than $920, the system does not automatically approve the payment. |

> **Note:** You can go back to the invoice information and update it as needed after entering the quantities received.

4. On the right side of the Receive Material page, click the **Receiving** tab and do one of the following to enter the received quantities:

| To... | Do this... |
|-------|-----------|
| receive the remaining quantity of an item | Click **Fill in Receive Now with Remaining Qty**.<br>The system populates the **Receive NOW** field for each item from the vendor with the difference between the **Released Qty** and the **Received Qty** fields. |
| receive partial quantities of items from the vendor | In the **Receive NOW** field for each item, enter the quantity included on the invoice. The system recalculates the amount in the **Recv. Ext Cost** field to reflect the **Receive NOW** qty multiplied by the **Cost**. |
| receive quantities by releases to the vendor | 1. From the **Release(s)** field, select the release you want to reconcile.<br>2. Click **Fill in Receive Now based on the Release** to enter the quantities of the items from the release in the **Receive NOW** field. |
| split an item into multiple items for receiving purposes | click the split items icon  and continue with Splitting Items into Smaller Components. |

For items that are unit priced, the system calculates the extended cost of the received items by multiplying the quantity in the **Receive NOW** field by the price per each listed in the **Cost** field. The system uses this amount to calculate the grand total of items received on the invoice, and enters that number in the **Receive Amount** field on the left side of the Receive Material page.

For items that are priced as a lot, if you are receiving the entire quantity on the order, the system enters the price for the entire lot in the **Recv. Ext. Cost** field for each item in the lot. If you are receiving partial quantities, enter the portion of the lot price billed on the invoice in the **Recv. Ext. Cost** field of one of the items you are receiving. The system enters this amount in the **Receive Amount** field on the left side of the Receive Material page.

5. Click **Save To Eclipse** to create or update the payable in Eclipse, and to create the invoice order generation and accounts receivable record for the customer, or click **Cancel** to return to the Job Summary page without creating the payable information.

For information about the records created in Eclipse, see Eclipse Transactions Created for Receiving.

---

**See Also:**

Receiving Orders for Jobs Overview

Splitting Line Items on Jobs

Eclipse Transactions Created for Receiving

# Changing Vendors During Receiving

As you complete jobs and receive material, you might find that the vendors that you received the material for the job from do not match those that you originally entered on the bill of materials. Prior to receiving the material and creating payables, you can change the vendor who receives the invoice.

**To change vendors during receiving:**

1. After the items are released for shipping and you receive invoices from your vendor, in the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Do one of the following to create or select a payable:

| To... | Do this... |
|-------|-----------|
| create a new payable for a new invoice | From the **Select Payable** field, select **New**. From the **Vendor** field, select the vendor for which you are entering receiving information. |
| enter quantities received against an invoice entered in Eclipse A/P entry | From the **Select Payable** field, select the payable for when you want to enter receiving information. The system displays the information for the payable as it was entered in Eclipse. |

3. Click the change vendor 👤 icon next to the **Vendor** field.

4. Select a vendor from the list, or enter a new vendor in the **Select a New Vendor** field.

5. In the **Reason for Change** field, enter the reason that you are updating the vendor for the payable and click **Finish**. Click **Cancel** to return to the Receive Material page without changing the vendor.

6. Continue receiving and reconciling the orders for the vendor.

# Distributing Return Amounts Across G/L Accounts

As you work through receiving invoices and material for a job, you might find it necessary to distribute amounts across different accounts in your general ledger to write off the amount, or to debit customers invoice amounts for a certain portion of the receiving, for example, for engineering fees.

If you created the payable within Eclipse, the general ledger accounts you used display in Job Management when you display the payable in the Receive Material page.

**To distribute a return across G/L Accounts:**

1. After engineering fees are released you receive invoices from your reps, in the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Receive and reconcile the fees.

3. Click the **G/L Distribution** tab.

4. Select the branch and G/L accounts to use for the return, and enter the appropriate amounts to distribute to each account.

5. Click **Save To Eclipse** to update the general ledger accounts in Eclipse, or click **Cancel** to return to the Job Summary page without creating the payable information.

**To debit a customer's invoice for a return:**

1. After engineering fees are released you receive invoices from your reps, in the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Receive and reconcile the fees.

3. To debit the customer's invoice total for the general ledger amounts, select the **Debit Customer for G/L** check box and complete the debit information:

| Field | Description |
|---|---|
| **G/L Amount** | Enter the total amount to debit to the customer. |
| **Miscellaneous Charge Product** | Enter the product assigned a MiscChrg status to use for the debit amount. For example, you might have a product set up to handle all your customer refunds. |
| **Ordered By** | Enter the original order taker. |
| **Reason** | Enter any comments you want to include in the payable and return documents, for example, include a reason why you are debiting the customer for the amount in the **G/L Amount** field. |

4. Click **Save To Eclipse** to update the general ledger accounts in Eclipse, or click **Cancel** to return to the Job Summary page without creating the payable information.

# Splitting Items into Smaller Components for Release, Receiving, and Return

As you are ordering, receiving, or accepting returns for items for a job, you might find that an item you ordered as a single unit is actually shipped as separate components. For example, you enter 100 of Item A on the bill of materials (BOM) for $10.00 each. As the job progresses, you find that Item A is split into three different components, each shipped separately from the vendor because each component is installed at a different stage of construction.

Split an item to create components on the bill of materials (BOM), release the components separately from the vendor, receive the components separately on the Receive Material page, and adjust the cost for each component, as needed.

---

**Important:** If you click **Cancel** in the Manage POs and Releases or Receiving Material page after splitting components but before creating purchase orders or payables, the split definitions are also canceled. The cost and sell price are returned to the original amount for the line item.

---

**To split an item into smaller components:**

1. From either the Manage POs page or the Receive Material page, click the split item icon next to the line item you want to split to display the Split Item dialog box.

2. In the **Type** field at the top of the window, modify the generic name for the kind of item needed for the split, if necessary. The name must be unique to BOM for the job.

3. In the **Description** field at the top of the window, modify the description of the original item if necessary.

   For example, you entered an item on the BOM as Item A to reflect the information on the Item Schedule for the job. As the job progresses, you determine that Item A is broken into two distinguishable parts. As you split the item, rename the original item to better identify it.

4. For each additional part for the item, enter the following information:

| Field | Description |
|---|---|
| **Qty per/item** | Enter the quantity per item that you want to split. The quantity you enter here is multiplied by the quantity of the original item. |
| **Description** | Enter the description of the new item. |

| Field | Description |
|-------|-------------|
| **Cost** | Enter the cost per item. The total cost for all the items you are splitting cannot exceed the cost for the original item.<br><br>**Note:** If you are splitting items prior to creating purchase orders and releasing material, if you do not know the cost of the individual piece, leave this field set to $0.00. You can enter the cost for split items with a $0.00 cost when you enter receiving information. At that point the system calculates the dollar balance for the original item. |

To add rows to accommodate additional splits, enter the number of rows you want to add in the **Add more rows** field and click **Add More Rows**.

5.  Click **Split Item** to add the new items or click **Cancel** without creating the new items.

---

**See Also:**

Releasing Items from Vendors or from Stock

Receiving Orders for Jobs Overview

# Editing Existing Receiving Information

Entering invoice details from your vendor and entering what items are received for a job creates payables and invoices for the items ordered. As you are receiving material, you might find that you need to edit receiving information that you entered due to errors in the product, quantity or cost information.

You can make changes to existing receiving information under the following conditions:

- The associated Eclipse payable has not been paid.
- The general ledger accounting period is still open.
- The original payable contains only one direct order.
- Another user is not editing the payable in Eclipse.

If you paid engineering fees on the original receiving, you cannot make changes to those fees using the process described below.

**To edit existing receiving information:**

1. In the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Click the edit receiving ![icon] icon in the top left of the page, and select the payable you want to edit from the **Edit a Payable** field.

   Only payables that meet the criteria above display in the list.

3. Update the receiving information, such as the quantity received or the total cost, and click **Save To Eclipse**.

   The system saves your changes to the invoice generation of the direct order and the associated payable in Eclipse.

**To delete receiving information without deleting the payable:**

1. In the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Click the edit receiving ![icon] icon in the top left of the page, and select the payable you want to edit from the **Edit a Payable** field.

   Only payables that meet the criteria above display in the list.

3. Click **Undo** to delete the receiving information from within Job Management and return to the Job Summary page. You can come back in and re-enter the receiving information for that payable invoice at a later time.

   Clicking **Undo** does not delete the exiting payable in Eclipse. If you want to delete the payable, cancel the invoice on the direct order through Eclipse.

# Viewing EDI 810 Invoice Review Queue Data

If you transmit data with your vendors using the Electronic Data Interchange companion product, you can view the information you would see in the Eclipse EDI 810 Review Queue for the invoice directly from the Job Management interface.

> **Note:** If you open a payable in Eclipse that you created in Job Management, the job number displays on the payable to help identify which job it relates to.

**To view EDI 810 Invoice Review Queue data for an invoice:**

1. In the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Select an invoice from the Select a payable drop-down list, or create a new payable.

3. Click the EDI 810 icon  below the field to display the EDI 810 Archive Report for the payable.

   The report, which displays as a PDF file,  includes information about the line item and the EDI match codes, such as price mismatches and quantity mismatches.

# Eclipse Transactions Created for Receiving

As you enter receiving information for a job in Job Management, the system creates and saves the following transactions within Eclipse.

- An accounts payable record for the vendor invoice, which enables a check payment when the payable is approved for your payment to the vendor.

- An order generation on the direct order for the customer invoice.

- An accounts receivable record to which you can post payment when you receive payment from the customer.

If you are receiving partial orders, the system updates the order to indicate what is still left to receive, even if the order is lot priced. Lot priced orders list the items and quantities received on the invoiced order generation, and the items and quantities left to receive on the open order generation directly under the lot price product used for pricing on the order. See example.

In addition, the system makes the following updates to the Job Summary information for the job:

- On the **Job Status** tab, the system updates the quantities in the **Received/Invoiced** field for each item to indicate the quantities you have received.

- On the **Financial Summary** tab, the system updates the **A/P Billed Amount** and **Amount Invoiced** fields in the Vendor Summary table for each vendor, and recalculates the **% Complete** and **Left to Bill** amounts accordingly to provide an overall picture of the dollar amounts for each vendor on the job.

  The system also updates the Customer Invoices and Payments table to include the amounts on invoices sent to the customer, referenced by the invoice order generation. As

you post payments to the accounts receivable record in Eclipse, the table updates to reflect the amount paid.

In addition, the system updates the Vendor Invoices table to include the invoice numbers and their associated Eclipse accounts payable records.

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**See Also:**

Viewing and Searching Invoices with Open Quantities for Receiving

Receiving and Reconciling Orders

# Initiating Payables in Eclipse

When you enter a payable in A/P Entry in Eclipse or Solar Eclipse for a direct order that is associated with a job, you are telling the system that there is an invoice that needs to be paid for that job. This also indicates that you need to receive items against the payment within Job Management.

When you create the payable, the system creates a receiving generation on the direct order for the amount of the payable created in A/P Entry. Because you are not indicating the specific items received when you create the payable, the system creates a placeholder line item on the direct order called **Job Mgmt.Payable** with a cost equal to the reconcile amount.

After you receive the items in Job Management and reconcile against the payable you created in Eclipse, the system replaces the placeholder with the actual items received in Job Management. At this point, the system has the information it needs to reduce the quantities on the original open generation by the amount you received.

```
┌────────────────────┐     ┌────────────────────┐     ┌────────────────────┐
│ In Eclipse/Solar   │     │ The system sets the│     │ In Job Management, │
│ Eclipse, create    │     │ payable's approval │     │ receive and        │
│ payable to direct  │ ──▶ │ flag to No and     │ ──▶ │ reconcile items    │
│ vendor, reconciling│     │ opens the Job      │     │ against the payable│
│ the amount on the  │     │ Management         │     │ you entered in     │
│ invoice and save   │     │ application        │     │ Eclipse. Click     │
│ the payable.       │     │                    │     │ Save to Eclipse.   │
└────────────────────┘     └────────────────────┘     └────────────────────┘

          ┌────────────────────┐     ┌────────────────────┐
          │ The system sets the│     │ The system updates │
          │ approval flag for  │     │ Job Mgmt. Payable  │
          │ the payable        │ ◀── │ item on the        │ ◀──
          │ according to the   │     │ generation with the│
          │ Job Management Admin│    │ quantities; reduces│
          │ control maintenance│     │ open generation    │
          │ record.            │     │ quantities         │
          └────────────────────┘     └────────────────────┘
```

> **Note:** The system only opens the Job Management application if you a URL is entered in the Receiving URL field of the Job Management Administrator Settings control maintenance record.

# Returning Items Overview

As your customer completes work on a job, they might return products that you ordered, shipped, and received in the system because they no longer need the item, ordered too many, or the items are defective.

You can choose to not accept the return from the customer, accept the return and send it back to the vendor, throw the item out and write it off as a loss, or keep the item and put it into your inventory as a defective item, or as a non-stock product.

Orders created using Job Management enter the system as direct orders, unless you are shipping items from your own stock. Returns for direct orders from the vendor are entered as reverse directs. The system creates the following when you create a return for a direct order in Job Management:

- Creates a generation on the order for the returned items.
- Creates a negative accounts receivable record for credit or cash due back to the customer.
- Creates a negative accounts payable record for credit due to you from the vendor.

For more information about entering and processing returns, see the following topics:

- Returning Job Material to Vendors
- Returning Direct Shipped Job Material to Your Inventory
- Entering Non-Material Charges for Returns
- Canceling Open Return Quantities

You must be assigned the JOB.MGMT.RETURN authorization key to enter returns.

---

**See Also:**

Entering Returned Quantities

# Returning Job Material to Vendors

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**Important:** Use this procedure to return items to your inventory that were originally
shipped from your stock for the job.

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In some cases, a customer might notify you that they have material to return to you that you need
to return to the vendor. After you enter the quantities the customer is returning, you can print
return documents and enter receiving information for the returns, which creates the appropriate
receivables and payables in Eclipse for the return.

You can only enter return quantities for items that you have indicated as received. For return
items that you shipped from your stock, process those returns through Eclipse. For information
about returning job material that was direct shipped from the vendor to your customer into your
stock, see Returning Job Material to Your Inventory.

You must be assigned the JOB.MGMT.RETURN authorization key to enter returns.

**To return job material to a vendor:**

1.  In the Job Summary menu bar, click **Return** to display the Returns page.

    The Returns page displays all the items on the bill of materials for the job. Items that do
    not have received quantities are disabled.

2.  Select the **Vendor** radio button to indicate that you are entering quantities to return to the
    vendor.

3.  Select the return type and describe why the material is being returned.

    The type, reason, and comments you enter select here apply to the entire return. For
    example, if you have returns for 5 of Item A because they are defective, and 2 of Item B
    because they were an over shipment, create two separate returns so you can apply the
    correct return types and reasons.

| Field | Description |
|---|---|
| **Return Type** | Select the type of return, such as **Defective** or **Overship** to define why the customer is returning the material.<br><br>The default return type is set to the value in the **Default Return Goods Quantity Type**control maintenance record for the Job Management pricing branch that is set in the Job Management Admin control maintenance record. If the **Default Return Goods Quantity Type**control maintenance record is not set, the return type defaults to **Review**. |
| **Reason for Return** | Select why the customer is returning the material. The valid return reasons are defined in the **Valid Reason for Return Codes**control maintenance record for the Job Management pricing branch that is set in the Job Management Admin control maintenance record. If the **Valid Reason for Return Codes**control maintenance record is not set for the pricing branch, a blank selection is also available in the list.<br><br>If the **Require Reason For Return Code** control maintenance record is set to Yes, this field is required. |

| Field | Description |
|-------|-------------|
| **Comment** | Enter any additional information regarding the return. The comments you enter here print on the return document. |

4.  In the **Return Now** field for each item that you want to return, enter the total quantity the customer is returning. The available quantity to return is listed in the **Qty Avail for Return** field.

    **Note:** The quantity available for return is the invoiced quantity minus any that have already been returned and received.

5.  In the pricing fields, do one of the following:

    - **For unit-priced items** - Update the original cost and sell price of the item, if necessary. The system displays the original cost, sell price, and margin of the item as listed on the bill of materials. If you are returning the item to the vendor at a different cost, update the **Cost** field to reflect the new amount. If you are crediting the customer a different price than what you sold the item, update the **Sell** field with the new sell price for the item.

    - **For lot-priced items** - In the **Cost** field, enter the total credit for the lot for the items being returned. The system applies the updated cost to all the items in the lot. If you are crediting the customer a different price than what you sold the item to, enter the total credit in the **Sell** field.

    - **For split components** - Click the split items icon  and continue with Splitting Items into Smaller Components.

    As you enter returns for material and non-material charges, the system totals the credit amounts below the material table.

6.  To create the return without generating any documentation about picking up any return material, click **Suppress Document**. Typically, you do not generate return documents if the customer has retuned the material to you and it is already in your warehouse.

7.  Click **Create Return** to display the Return Preview page.

    The Return Preview page displays the return items for each vendor separately and includes the total material amount being returned.

8.  For each vendor, select the **Print** check box if you want to print the material return documents and select the printer to which you want to send the documents.

9.  To include special shipping instructions on the return order, enter the instructions in the **Shipping Instructions** field and select whether you want to include the instructions before the line items on the order, after the line items, or in both places.

10. Click **Confirm and Print Return Goods Pickup** to create the documents and to save the return information.

   The system generates the return documents, and displays the Job Status Summary table. The table now indicates the return quantities you just entered in the **Returned** column.

11. When you or your vendor receive the return items from your customer, continue with Receiving and Reconciling Returns.

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**See Also:**

Returning Items Overview

# Receiving and Reconciling Returns to Vendors

After you or your vendor has received the returned material, enter receiving details to create the receivable and payable records in Eclipse for the returns, and to create the order generations for the returns in Sales Order Entry. Receiving and reconciling returns allows your accounting staff to credit customers for the items they are returning and to post refunds from your vendor.

> **Important:** Receive and reconcile returns in Job Management for material that you are returning to your vendors. For material that was direct shipped from the vendor to the customer that you are accepting into your inventory, reconcile and receive those returns using the Return Goods Queue in the Eclipse.

You use the same page to receive and reconcile returns that you do to receive and reconcile orders. The procedure below provides basic instructions for receiving and reconciling a return order.

You must be assigned the JOB.MGMT.RETURN authorization key to enter returns and the JOB.MGMT.EDIT.STK.COST authorization key to change the cost of stock products on a return.

**To receive and reconcile a return:**

1. After you enter items as returned, in the Job Summary menu bar, click **Receive Material** to display the Receive Material page.

2. Do one of the following to create or select a payable:

| To... | Do this... |
|---|---|
| create a new payable for a new invoice | From the **Select Payable** field, select **New**. From the **Vendor** field, select the vendor for which you are entering receiving information. |
| enter quantities received against an invoice entered in Eclipse A/P entry | From the **Select Payable** field, select the payable for when you want to enter receiving information. The system displays the information for the payable as it was entered in Eclipse. |

3. Enter the remaining invoice information on the left side of the Receive Material page, as necessary.

Enter negative invoice amounts when receiving returns.

| Field | Description |
|---|---|
| **P/O Number** | Select the order number to which you are reconciling received quantities. |
| **Invoice Number** | Enter the identifying number on the invoice you received from the vendor.<br><br>**Note:** This field is not case sensitive. If you enter **#ab123** and **#AB123** already exists, the system treats it as a duplicate invoice. |
| **Invoice Date** | Enter the date on the invoice you received from the vendor. The field defaults to today's date. |
| **Invoice Amount** | Enter the total amount due to the customer on the return. |
| **Freight** | (Optional) Enter the freight amount due back to the customer, if any. The system reduces the Reconcile Amount by the dollar amount you enter here. |
| **Tax** | (Optional) Enter the tax amount on the invoice if you are giving that amount back to the customer. Otherwise, entering the tax is not necessary. The system reduces the Reconcile Amount by the dollar amount you enter here. |
| **Deductions** | (Optional) Enter the amount of any deductions on the invoice.  The system reduces the Reconcile Amount by the dollar amount you enter here. |
| **Pro/Tracking#** | (Optional) Select the shipment tracking number that the freight carrier generated and provided to you for the order. To add a new tracking number, click the plus icon ⊕ , enter the number, and click **OK**. |
| **Reconcile Amount** | (View Only) The invoice amount minus any freight, tax, discounts or other deductions listed in the **Freight**, **Tax**, and **Deductions** fields. This is the total amount billed for actual products listed on the invoice. |
| **Receive Amount** | (View Only) The total extended cost of the items you are reconciling for the return. Enter the quantity received of each item from the vendor in the **Receive NOW** field in the Receiving section of the page. This field updates to reflect the new dollar amount as you enter the received quantity. |
| **G/L Amount** | TBD |
| **Difference** | (View Only) The difference between the reconcilable amount on the invoice in the **Reconcile Amount** field and the total received amount listed in the **Receive Amount** field. If the difference is a negative dollar amount, it indicates that the amount on the invoice is less than the amount that you have received. |

| Field | Description |
|---|---|
| **Allowed Variance** | (View Only) The dollar amount or percentage of the total that determines whether the system automatically approves the invoice for payment. This amount applies to differences either over or under the extended received amount for the invoice.<br><br>**Note:** If the vendor record in Eclipse does not contain an over/short dollar amount or percentage in the **Over/Short%** and **Over/Short$** fields, the system uses the maximum variance set in the A/P Over/Short Maximum Parameter control maintenance record.<br><br>For example, the vendor record in Eclipse is set to a variance of $20. This variance means that if the extended received amount is $900 and the vendor's invoice amount, as entered in the **Invoice Amount** field is between $880 and $920 ($20 above or below the received amount) the system approves the payment. However, if the invoice amount is less than $880 or more than $920, the system does not automatically approve the payment. |

**Note:** You can go back to the invoice information and update it as needed after entering the quantities received.

4. On the right side of the Receive Material page, click **Receiving a return order** and select the return order you want to receive from the **Returns** field.

5. Do one of the following to indicate how many of the returned quantity you want to receive:

| To... | Do this... |
|---|---|
| receive the entire quantity on the return | Click **Fill in Receive Now based on return**<br>The system populates the **Receive NOW** field for each item from the vendor with the quantities on the return order. |
| receive partial quantities of items from the vendor | In the **Receive NOW** field for each item, enter the quantity included on the invoice. The system recalculates the amount in the **Recv. Ext Cost** field to reflect the **Receive NOW** quantity multiplied by the **Cost**.<br>When you save the return to Eclipse, the system creates separate order generations for the amount you are receiving, and the remaining return quantity that is left to receive. |
| split an item into multiple items for receiving purposes | click the split items icon  and continue with Splitting Items into Smaller Components. |

For items that are unit priced, the system calculates the extended cost of the received items by multiplying the quantity in the **Receive NOW** field by the price per each listed in the **Cost** field. The system uses this amount to calculate the grand total of items received on the invoice, and enters that number in the **Receive Amount** field on the left side of the Receive Material page.

For items that are priced as a lot, if you are receiving the entire quantity on the order, the system enters the price for the entire lot in the **Recv. Ext. Cost** field for each item in the lot. If you are receiving partial quantities, enter the portion of the lot price billed on the

invoice in the **Recv. Ext. Cost** field of one of the items you are receiving. The system enters this amount in the **Receive Amount** field on the left side of the Receive Material page.

6.  Click **Save To Eclipse** to create or update the payable in Eclipse, and to create the invoice order generation and accounts receivable record for the customer, or click **Cancel** to return to the Job Summary page without creating the payable information.

---

**See Also:**

Returning Items Overview

Entering Returned Quantities

Entering Non-Material Charges for Returns

Canceling Open Return Quantities

# Returning Direct Shipped Job Material to Your Inventory

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**Important:** Use this procedure described Returning Job Material to Vendors to return items to your inventory that were originally shipped from your stock for the job. The procedure described below is to return direct shipped material to your inventory.

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In some cases, a customer might notify you that they have material to return to you that was originally direct shipped from the vendor to the customer. You can make the decision to return the direct shipped material directly into your stock, to add it to your inventory. When you return the direct shipped material, you select the product to which you are going to return the material in your inventory, thus affecting your inventory level.

You can only enter return quantities for items that you have indicated as received. For information about returning job material that was direct shipped from the vendor back to your vendor, see Returning Job Material to Vendors.

You must be assigned the JOB.MGMT.RETURN authorization key to enter returns.

**To return a direct shipment to your inventory:**

1. In the Job Summary menu bar, click **Return** to display the Returns page.

   The Returns page displays all the items on the bill of materials for the job. Items that do not have received quantities are disabled.

2. Select the **Stock** radio button to indicate that you are entering quantities you are returning to your inventory.

3. Select the return type and describe why the material is being returned.

   The type, reason, and comments you enter select here apply to the entire return. For example, if you have returns for 5 of Item A because they are defective, and 2 of Item B because they were an over shipment, create two separate returns so you can apply the correct return types and reasons.

| Field | Description |
|---|---|
| **Return Type** | Select the type of return, such as **Defective** or **Overship** to define why the customer is returning the material. |
|  | The default return type is set to the value in the **Default Return Goods Quantity Type**control maintenance record for the Job Management pricing branch that is set in the Job Management Admin control maintenance record. If the **Default Return Goods Quantity Type**control maintenance record is not set, the return type defaults to **Review**. |

| Field | Description |
|-------|-------------|
| **Reason for Return** | Select why the customer is returning the material. The valid return reasons are defined in the **Valid Reason for Return Codes**control maintenance record for the Job Management pricing branch that is set in the Job Management Admin control maintenance record. If the **Valid Reason for Return Codes**control maintenance record is not set for the pricing branch, a blank selection is also available in the list.<br><br>If the **Require Reason For Return Code** control maintenance record is set to **Yes**, this field is required. |
| **Comment** | Enter any additional information regarding the return. The comments you enter here print on the return document. |

4. In the **Return To Stock Product** field, enter a brief description of the product to which you want to return the direct product, and click the search icon 🔍 to search the Eclipse product records. Select the product from the displayed list.

   You can also use the **Create Non-Stock** tab in the Search Results page and create a non-stock product in your inventory to which you want to return the product.

5. In the **Return Now** field for each item that you want to return, enter the total quantity the customer is returning. The available quantity to return is listed in the **Qty Avail for Return** field.

   **Note:** The quantity available for return is the invoiced quantity minus any that have already been returned.

6. Do one of the following:

   - **For unit-priced items** - Update the original cost and sell price of the item, if necessary. The system displays the original cost, sell price, and margin of the item as entered on the bill of materials (or the change order if one was created for the product) for the job. If you are returning the item to your stock at a different cost, update the **Cost** field to reflect the new amount. If you are crediting the customer a different price than what you sold the item at, update the **Sell** field with the new sell price for the item.

   - **For lot-priced items** - Lot priced items are returned to your inventory priced as individual unit priced products, not as a lot-priced group of products. The system flags the **Unit Price Extend** check box, for the product in the return table. Enter the amount you paid the vendor for the product in the **Cost** field, and the amount you would have charged and want to refund to the customer in the **Sell** field.

   - **For split components** - Click the split items icon 🔀 and continue with Splitting Items into Smaller Components.

   As you enter returns for material, the system totals the credit amounts below the material table.

7. To create the return without generating any documentation about picking up any return material, click **Suppress Document**. Typically, you do not generate return documents if the customer has retuned the material to you and it is already in your warehouse.

8.  Click **Create Return** to display the Return Preview page.

    The Return Preview page displays the return items separately and includes the total material amount being returned.

9.  For each vendor, select the **Print** check box if you want to print the material return documents and select the printer to which you want to send the documents.

10. To include special shipping instructions on the return order, enter the instructions in the **Shipping Instructions** field and select whether you want to include the instructions before the line items on the order, after the line items, or in both places.

11. Click **Confirm and Print Return Goods Pickup** to create the documents and to save the return information.

    The system generates the return documents which includes the stock product to which you are returning the product, creates the return orders in Eclipse, and displays the Job Status Summary table. The table now indicates the return quantities you just entered in the **Returned** column.

12. When you receive the return items from your customer, receive the items in Eclipse using the Returns Good Queue. The returns are not available in the Receiving page of Job Management.

---

**See Also:**

Returning Items Overview

Returning Job Material to Vendors

# Entering Non-Material Charges for Returns

As you accept returns from your customers, you might charge restocking fees or other processing fees to handle those returns. These charge types are considered non-material charges because they do not relate to the cost of the actual item being returned.

Non-material charges are added to orders as miscellaneous charge products. Typically, your company has a placeholder product for charges such as restocking fees. Use these placeholder products to add any non-material charges for item returns.

You must be assigned the JOB.MGMT.RETURN authorization key to enter returns.

**To enter a non-material charge for a return:**

1. In the Job Summary menu bar, click **Return** to display the Returns page and navigate to the Non-Material Charges section.

2. In the **Vendor** field, select the vendor to which the non-material charge applies. This is the vendor to whom you are returning the products returned from your customer.

3. In the **Quantity** field, enter the total number of the miscellaneous charge you want to add to the order.

   For example, if a customer is returning two different product types and you want to charge a restocking fee for each item, enter 2 in this the Quantity field.

4. In the **ERP Misc. Charge Type** field, enter the miscellaneous charge product to use on the order.

5. In the **Unit Price** field, enter the price per each for the charge.

   If there is a price for the miscellaneous charge product defined in Eclipse, that price displays in the Unit Price field. Update the price, if necessary.

   The **Ext. Price** field displays the price multiplied by the quantity in the **Quantity** field.

6. Repeat steps 2 through 5 to add additional non-material charges to the return.

7. Click **Create Return** to preview the return information or click **Cancel** to remove your changes and return to the Job Summary page without creating the return.

8. For each vendor, select the **Print** check box and select a printer to print the return documents and click **Confirm and Print Return Goods Pickup**.

   Leave the **Print** check box deselected to create the return documents without sending them to the printer.

   The system creates a generation on the original direct order for the non-material charges. You can view the direct order in Eclipse or Solar Eclipse. The system also updates the Job Summary information to indicate how

**See Also:**

Returning Items Overview

# Canceling Open Returns

When you enter a return the system creates a generation on the original sales order for the returned quantity. If you receive only a part of the original return quantity the system creates a separate generation for the return quantity you are yet to receive. If you do not receive the remaining quantity, use the following procedure to cancel the open return in the system.

For example, your customer says they have 10 of a product to return to you. Create a return for the job for 10 of the product. When you pick up the products from the customer, and receive the products back at your warehouse, you find that you only have 8 of the product instead of 10. When you receive a partial return for the 8 you do have in Job Management, the system creates an order generation for the 8 you are receiving, and an order generation for the 2 remaining. If you determine that your customer does not have the 2 remaining to return to you, use the following procedure to cancel the remaining open order generation for the return.

Cancel the return through the Job Management application to ensure that the Job Summary information correctly reflects the return quantities.

> **Note:** For lot-priced items, you can only clear full quantities, because the system is unable to determine the dollar amount to put back on the job. As a result, on lot-priced items, you have to cancel the full quantity, then recreate a return for the actual return quantity.

**To cancel an open return quantity:**

1. In the Job Summary menu bar, click **Return** to display the Returns page.

2. Click **Cancel Open Returns** tab to display all returns with an open receiving quantity.

   The table lists all returns that still have an open quantity.

3. In the **Cancel Qty** field for each product, enter the total quantity you want to cancel, and click **Save**. You can enter the entire open quantity, or a part of the open quantity to cancel.

   The system removes the open order generation in Eclipse, and updates the Job Summary information to correctly reflect the return events.

# Viewing Sell, Cost, and Overall Margin

The financial summary for a job tracks transactions through the entire job history and reports costs and margins as the job progresses. Use the financial summary to compare costs and margins on initial totals with current job totals and change orders.

**To view sell, cost, and overall margin for a job:**

1. After the bid has been finalized, award the job to a customer.

2. Click **Job Summary** in the menu bar from any page in an active and awarded job.

3. Click the **Financial Summary** tab to view the job ledger, vendor summary, and A/R and A/P information.

4. View the Job Ledger section for the sell price, cost, and margin for the following portions of the job:

   - **Initial Job Total** - The total amount of the order on hold for release. The action of placing items on hold for release locks those items on the bill of materials (BOM). Until you lock the BOM, the initial job totals are $0.00. "Complete" displays in the table header if all items on the BOM have been added to a Hold for Release purchase order. "Incomplete" displays if there are items on the BOM not added to a Hold for Release purchase order or a release purchase order.

   - **Change Orders / Return Totals** - The job amounts as they are affected by change orders and returns. Pending change orders are not included in the totals.

   - **Current Job Total** - The job amounts reflected at the current time.

   For any of the Totals tables, if the margin is higher than the initial bid, it displays green. If the margin is lower than the initial bid, it displays red to help you better determine your profit on the job.

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**See Also:**

Viewing Vendor Cost, Price, and Transactions for a Job

Viewing Customer and Vendor Invoice Totals for Jobs

# Viewing Vendor Cost, Price, and Transactions

The financial summary for a job tracks transactions through the entire job history and reports costs and margins as the job progresses. Use the vendor summary to view financial information per vendor with items on the bill of materials (BOM) for a job. You can also view the individual transactions, such as purchase orders per vendor on a job.

**To view vendor cost and price summaries for a job:**

1.  After the bid has been finalized, award the job to a customer.

2.  Click **Job Summary** in the menu bar from any page in an active and awarded job.

3.  Click the **Financial Summary** tab to view the job ledger, vendor summary, and A/R and A/P information for purchase orders created for the job.

4.  View the following information in the Vendor Summary section of the page:

| Column | Description |
|---|---|
| **Name** | The vendor's name, as listed in the BOM. |
| **Sell Amount** | The current total sell price associated with products purchased from this vendor for the job, including change orders and returns. |
| **Cost Amount** | The current total cost associated with this vendor for the job, including change orders and returns. |
| **GP%** | The current gross profit percent for items associated with this vendor for the job. |
| **A/P Billed Amount** | The current amount that the vendor has billed you for items on the job, minus any freight and handling charges. |
| **A/P Frt & Handling** | The current amount that the vendor has billed you for freight and handling on the job. |
| **Total A/P** | The total amount, including the billed amount for items plus any freight and handling charges, that the vendor has billed you for items on the job. |
| **A/R Billed Amount** | The current amount you have invoiced to the customer for items associated with this vendor for the job, minus any freight and handling charges. |
| **A/R Frt & Handling** | The current amount that you have charged the customer for freight and handling for items associated with this vendor for the job. |
| **Total A/R** | The total amount, including the billed amount for items plus any freight and handling charges, that you have invoiced to the customer for items associated with this vendor for the job. |
| **% Complete** | The current percentage of the job that has been invoiced. |
| **Remaining Sell** | The total amount that remains to be invoiced from your vendors, and entered as payables in the system. |
| **Remaining Cost** | The total amount that remains to be invoiced to your customer. |

**To view a vendor's transaction history for a job:**

1.  After the bid has been finalized, award the job to a customer.

2.  Click **Job Summary** in the menu bar from any page in an active and awarded job.

3.  Click the **Financial Summary** tab to view the job ledger, vendor summary, and A/R and A/P information.

4.  View the following information in the Transactions section below the Vendor Summary table:

| Column | Description |
|---|---|
| Date | The date of the transaction. |
| Transaction | The transaction type, such as purchase order or return. Click this item to view printable copy of this transaction. |
| Customer PO# | The customer's purchase order number used as a reference for all transactions associated with an order. |
| Vendor | The vendor's name on the transaction. |
| Cost Amount | The total cost associated with the transaction. |
| Cost Balance | The order balance for cost associated with the order. |
| Sell Amount | The sell price of all items on the transaction. |
| Sell Balance | The order balance for sale price associated with the order. |

**See Also:**

Viewing Sell, Cost, and Overall Margin for Jobs

Viewing Customer and Vendor Invoice Totals for Jobs

# Viewing Customer and Vendor Invoice Totals

The financial summary for a job tracks transactions through the entire job history and reports costs and margins as the job progresses. Use the A/R and A/P summary to review vendor invoices and customer invoice payments created during the course of a job.

**To view customer invoice payments:**

1. After the bid has been finalized, award the job to a customer.

2. Click **Job Summary** in the menu bar from any page in an active and awarded job.

3. Click the **Financial Summary** tab to view the job ledger, vendor summary, and A/R and A/P information.

4. View the following information about payments the customer has made to you in the Customer Invoice Payments section under A/R A/P Information:

| Column | Description |
|---|---|
| Reference ID | The sales order number, check number, or cash payment number of the transaction. |
| Date | The posting date of the transaction. |
| Material Amount | The actual cost of the items ordered, minus freight and tax expenses. |
| Freight | The amount of freight and handling charged for the items. |
| Tax | The amount of tax charged for the items. |
| Invoice Amount | The amount invoiced on the transaction. |
| Balance | The remaining balance owed on the transaction. |
| Paid | The amount received and reconciled against the invoice. |
| % Billed | The percentage of the total order invoiced to the customer. |

**To view vendor invoices:**

1. After the bid has been finalized, award the job to a customer.

2. Click **Job Summary** in the menu bar from any page in an active and awarded job.

3. Click the **Financial Summary** tab to view the job ledger, vendor summary, and A/R and A/P information.

4. View the following information about payments you have made to your vendors during the course of the job in the Vendor Invoices section under A/R A/P Information:

| Column | Description |
|---|---|
| Vendor | The vendor's name as seen on the bill of materials (BOM). |
| Invoice # | The number of the invoice created for a shipment. |
| Reconciled | The amount of the invoice that has been reconciled against existing purchase orders. |

| Column | Description |
|---|---|
| Deductions | Any deductions or discount appoints applied to the invoice. |
| Freight | The amount paid to a customer in freight charges. |
| Tax | The amount of tax owed on the invoice. |
| Paid | The amount paid toward the total on the invoice. |
| Invoice Image | A printable copy of the invoice. Click the icon to display the image if one is available. If there is no icon in this field, an image does not exist for the invoice.. |
| Invoice Amount | The total amount on the invoice. |

**See Also:**

Viewing Sell, Cost, and Overall Margin for Jobs

Viewing Vendor Cost, Price, and Transactions for a Job

# Viewing Documents Generated for Jobs

Eclipse Job Management provides a way to track transactions or problems on a job through documentation. Any documentation sent to or received from vendors or customers is saved in PDF specifically for that job. The ability to retrieve job-related documents makes it easy to accurately verify transactions or track down problems.

Job Management saves the following documents for jobs:

- Bids

- Requests for quotes (RFQs)

- Purchase orders (POs)

- Release documents

- Change orders

- Returns

**To view a document generated for a job:**

1. Search and display the job for which you want to access a document.

2. From the Job Summary page, click the **Job Documents** tab to display the Documents page.

   The document table displays with the most recent document sorted at the top; however, you can sort the table by any of the columns, and arrange the documents in ascending or descending order for each column. The table displays the following information:

| Column | Description |
|---|---|
| **Type** | The kind of document generated for any of the following actions:<br>• Submittal<br>• Bid<br>• RFQ - request for quote<br>• Reserve purchase order<br>• Release purchase order<br>• Hold for release purchase order<br>• Pending and approved change orders<br>• Pending and approved return orders<br>Click the document you want to display in the **Type** column to open the PDF document. If PDF documents do not display in the browser window, you may need to download Adobe Reader at http://www.adobe.com/. |
| **Document Name** | Application-generated name given to each document including the type of document, date created, and the vendor or customer to which the system send the document. |
| **Customer** | Name of the customer on the transaction. |
| **Vendor/Rep** | Name of the vendor or representative on the transaction. |

| Column | Description |
|---|---|
| **Created On** | Date the documentation was created. When you first display this page, the table is sorted by date created. |
| **Customer PO#** | The customer-referenced purchase order number, if any. |
| **Eclipse PO#** | The number of the order generated in Eclipse. |
| **Created By** | Name of the user who created the document. |
| **Resend** | Click the icon to resend a document to the original recipients. |
| **Log** | Move your mouse over the icon to display how the document was last sent. The log includes information such as to whom a document was e-mailed, whether a Fax was sent successfully, and to which printer a document was sent. |

**See Also:**

Sending Requests for Quotes

Sending Bids

# Attaching Documents to Jobs

As you are working on a job, you might receive documents such as drawings, or have external spreadsheets that you want to store with the rest of the job data and documents. Attach those documents to the job in Job Management. You can also select to send those documents to vendors or to your customers as attachments to e-mails.

> **Important:** The Eclipse Document Imaging companion product is required to attach documents to jobs in Job Management. Contact your Eclipse sales representative for more information.

**To attach a document to a job:**

1. Search and display the job for which you want to attach a document.

2. From the Job Summary page, click the **Attachments** tab to display the Attach New Images page.

3. In the Attach New Images area, click **Add**, select the document you want to attach to the job, and then click **Open**.

   The path to the document displays in the list.

4. Repeat step 3 to add additional documents to the list to attach.

   Click **Cancel** next to a document in the list to remove it from the list of documents to upload.

5. Click **Upload** to attach all the documents in the list to the job.

   The attached documents display in the View Attached Images table, and indicates the type of file and the date it was uploaded.

**To view documents attached to a job:**

1. Search and display the job for which you want to access a document.

2. From the Job Summary page, click the **Attachments** tab to display the Attach New Images page.

3. In the View Attached Images table, click the description of the document you want to view to display the document.

   The image opens in a separate browser window. Select whether to open or save the file to continue.

**To remove a document attached to a job:**

1. Search and display the job for which you want to access a document.

2. From the Job Summary page, click the **Attachments** tab to display the Attach New Images page.

3. In the View Attached Images table, click the delete icon ✖ next to the document you want to remove.

# Resending Documents Generated for Jobs

As you are working on a job, you might need to resend documents, such as submittals or change orders to your customers or vendors due to transmission errors or other reasons. As you resend documents, you can update the customer address information before resending.

**To resend a document generated for a job:**

1. Search and display the job for which you want to access a document.

2. From the Job Summary page, click the **Job Documents** tab to display the Documents page and locate the document you want to resend.

3. Click the resend icon  next to the document you want to resend. The Resend Document dialog box displays.

4. In the **Resend** tab, enter the information about who to send the document to, and by what method.

| To... | Do this.. |
|---|---|
| indicate how and to where you want to send the document | Select one or more check boxes to indicate how to send the document and enter the corresponding information for each delivery method. For example, if you select the **Email** check box, enter the e-mail address to which you want to send the document in the text box next to the check box. |
| enter additional information for documents being sent using fax or email. | Click **Send To** to display the following fields. Complete the fields as necessary for resending your document.<br>• **From** - (Required) If you are sending the document using e-mail, enter your e-mail address. If you are sending the document using fax, enter your name or fax number.<br>• **Email CC** - Enter the e-mail addresses, separated by commas, to which you want to send copies of the e-mail and the document.<br>• **Subject** - The subject line of the e-mail.<br>• **Message** - The body of the e-mail or fax. |

5. To change the customer address on the document you are resending, click the **Override Values** tab and enter the new address information. Selecting the **Override Ship To** check box overrides the ship-to address for the customer on the document you are changing.

6. Click **Send** to send the documents using the methods you selected or click **Cancel** to close the dialog box without resending the document.

   If you clicked **Send To** to enter additional information, click the link again to close the expanded text and access the **Send** and **Cancel** buttons.

# Job Management Reports Overview

Eclipse Job Management helps you manage large commercial jobs, such as construction of stadiums or commercial high-rise buildings. Using reports allows you to further analyze each job you are bidding, as well as analyze financial information across jobs you have won and lost.

To schedule your reports to run in the future or at recurring intervals, see Scheduling Job Management Reports.

Job Management offers the following report options:

| To report on... | Run this report... |
|---|---|
| bids in an open status for a selected date range, sales person, job type, and project manager | **Open Bid List**<br>The report includes the internal job ID number, the job name, the customer or customers listed for the job and the main contact for the job, the bidder, bid and follow up dates, and the job status.<br>You can run the report by pricing branch or ship-from branch for all or a specific inside or outside salesperson, quoter, customer, project manager, or vendor, job type, and select whether to include awarded jobs.<br>Also use this report to review the confidence level you have in winning an open job. |
| the effect change orders have had on the job | **Change Order Summary**<br>This report includes information regarding any changes made to the original bill of materials for a job using change orders. The report includes the change order number, status, product description of what changed, customer purchase order number, and financial information regarding the changes, including job totals before and after the change orders.<br>You can run this report directly from the job, and select to view pending orders, approved orders, or all orders, and to include the cost on the report. |
| statistics of jobs you have won versus those you have lost | **Job Won/Lost**<br>This report includes a list of all the jobs by pricing branch or ship-from branch created in the system between the dates you enter in the **Start Date** and **End Date** fields and whether they were won, lost, the reason you lost the job, and to which competitor if you did lose the job. In addition, the report includes the job value based on the bill of materials, job cost, margin, number of bidders, the quoter for the job, and confidence level you noted on the Job Summary page when bidding the job. For jobs won, the report also includes the winning contractor.<br>**Note:** When you run the report, the BOM Value and BOM Cost refers to the to the bill of materials sell and cost for the job when the report was run. The Job Value and Job Cost is the value and cost of the sales orders generated from the job. |
| statistics regarding jobs won by your order writers or quoters | **Jobs Won by Writer**<br>This report includes statistics for jobs won by the quoter of the job, including job type, job value, cost, and margin, and final job cost, value, and margin. Click the **Additional Selection** option to select to run the report for specific quoters, customers, project managers, vendors, along with additional selection criteria. Leaving any of these fields blank runs the report for all. |

| To report on... | Run this report... |
|---|---|
| the progress of job as a percentage | **Percentage of Complete**<br>This report includes statistics for the completion of a job based on the percent of product shipped and received, and the amount of money collected from the customer for the job. You can select to report against a jobs price branch or ship-from branch, and whether to include, exclude, or report only on jobs that are completed.<br>**Note:** When you run the report, the Initial Job Value and Initial Job Cost refer to the original bill of materials sell and cost for the job. The Job Value and Job Cost is the value and cost of the sales orders generated from the job. You can select to include the BOM Value and BOM Cost as of when the report was run. |
| total dollar amount for a selected date range | **Project Reconciliation**<br>The report includes information regarding customer billing data, including the total dollar amount for the selected job, what you have billed to date, and the remaining balance to bill to the customer. Run this report for an internal look at the job.<br>The report also includes the invoices posted to date and the amounts posted with each of those invoices.<br>You can run this report directly from the job. |
| the status of each item on the bill of materials for a job | **Project Snapshot**<br>The report includes a listing of all items on the bill of materials, the quantity received, cost, and sell information. Run the report in **Internal** mode to include gross profit information. Run the report in **External** mode to include the cost and sell information.<br>You can run this report directly from the job.<br><br>**Note:** When you run the report, the Initial Job Value and Initial Job Cost refer to the original bill of materials sell and cost for the job. The Job Value and Job Cost is the value and cost of the sales orders generated from the job. |
| the shipping status of material on the report | **Shipping Status**<br>This report includes information regarding the shipment of material for the selected job. The report includes the product description, the product's purchase order status, the vendor who is supplying the item, the quantity ordered, and the information entered regarding the shipment including the external shipping notes.<br>This report displays the same information as the table in the Job Shipments Summary section of the **Job Status** tab in Job Summary. You can also select whether to include items that have zero quantity and whether to include open items in the report. You can use this report to send shipment information to your customers.<br>You can run this report directly from the job. |
| total dollar amount billed and left to be billed for a customer or vendor | **Customer/Vendor Project Reconciliation**<br>The report includes information regarding the total dollar amount for the selected job, what you have billed to date per customer, and the remaining balance to bill to the customer. |

# Running Job Management Reports

You can access the report functions in the following ways:

- If you are in a job, from any page, click **Reports** in the Job Summary menu bar. Running reports using this option provides report details in a PDF document for the specific job that you have open when you clicked the report icon.

- From any page, click **Reports** in the main menu bar to display the Reports page. From the Reports page, you can select reports to run without having to first display the job. The Reports page also offers reports that gather data from all your jobs, not just a single job. Running reports from the Reports page also gives you the option to display the report as a spreadsheet or as a PDF document.

For a description of the reports available, see Job Management Reports Overview.

**To run a report for a displayed job:**

1. From the Job Management Home page, search for the job and open it.

2. From the Job Summary menu bar, click **Reports**.

3. From the menu that displays, select the report you want to run.

   The system compiles the data for the job-specific report and displays it in a PDF or Microsoft Excel document, depending on your selection.

**To run a report that is not specific to a single job:**

1. From any page in Job Management, click **Reports** in the main menu bar to display the Reports page.

2. In the **Available Reports** list, select the report you want to run.

3. Enter the parameters to run the report. For more information about each report and what is available, see Job Management Reports Overview.

   If you had a job displayed when you clicked **Reports**,the Project Reconciliation Report, Shipping Status Report, and Change Order Summary Reports display the Selected Job section in the Report tab. Enter a different job in the **Job Name/ID#** field to run the report for a different job.

   If available for the report you are running, select **Additional Data** and indicate any additional information or filters you want to use when running the report. For example, running the report for a specific project manager, job type, or bidding status.

   Select the **Show Cost** or **Show Sell** check boxes in the **Additional Data** section to include cost and sell information on the report where appropriate.

   The system saves the settings you select for the next time you run the report.

4. Select the **PDF** or **Excel** radio buttons to select the output format for the report.

5. Click the **Include Company Logo on Report** check box to include the global logo defined or the specific logo defined for the user's price branch.

6. Click **Create Report** to compile the data and display the report.

**To select columns to include in a report:**

1. Select the report that you want to run directly from the job or from the **Reports** option in the main menu bar.

2. Click **Column Selection** to display the available columns for the report. By default, all the available columns are included in the report.

3. Do any of the following to select and move the columns you want to use:

| To... | Do this... |
|---|---|
| Remove selected columns from the report | In the **Selected Items** list, select the column or columns you want to remove and click **Remove**. |
| Remove all columns from the report | Click **Remove All**. |
| Add selected columns to the report | In the **Available Items** list, select the column or columns you want to add and click **Add**. |
| Add all available columns to the report | Click **Add All**. |
| Move a column in the report | In the **Select Items** list, select the column you want to move, and use the **First, Up, Down,** and **Last** buttons to move the column.<br><br>Columns are listed in the order they will display from left to right on the report page. |

**See Also:**

Scheduling Job Management Reports

# Scheduling Job Management Reports

Using reports allows you to further analyze each job you are bidding, as well as analyze financial information across jobs you have won and lost. Set your reports to run a schedule to help in your job analysis of job completions and other job details. You can set each Job Management report to run on a schedule, as needed.

**To schedule a job management report:**

1. From any report, click the Schedule option at the bottom of the report selections.

2. In the **Title** field, enter the title for the report. The default title is the name of the report type, such as the Open Bid List or Change Order Summary.

   Make the title specific enough so you can find the report later.

3. In the **ForwardList** section, indicate to which users you want to send a copy of the report. The person setting up the scheduled report is on the list by default.

| To... | Do ... |
|-------|--------|
| Add a user to the list to receive a copy of the completed report | Enter the user's Eclipse ID in the field and click **Add User**. |
| Delete a user from the list to receive a copy of the completed report | Select the check box next to the users that you want to remove from the list and click **Delete Users**. |
| Change the recipient's e-mail address | In the **E-mail** field, update the users e-mail address. The system pulls the e-mail address for the user as it is defined in their Eclipse user record. Changes you make here are saved for this report in Job Management, but are not saved to Eclipse. |

4. In the **Recurrence** section, indicate when and how often you want to run the report:

| Field | Description |
|-------|-------------|
| **Start Date/Time** | Enter the date and time of day you want to start running the report. |
| **Frequency** | Select the radio button to indicate if you want to run the report daily, weekly, monthly, or yearly at the time you specified. |
| **End By** | Select the radio button and enter the date to indicate when you want to stop running the report. For example, if you want to run the report weekly for a month, select the **Monthly** radio button, the **End By** radio button, and then enter the last day of the month in the field provided. To run the report until you have completed the job, select the **When Job Is Complete** option. |

5. Click **Schedule** to add the report to the Job Management report schedule.

**To view and delete scheduled reports:**

1.  From any page in Job Management, click **Reports** in the main menu bar to display the Reports page.

2.  Click the **My Schedule** tab to the reports you have scheduled to run in a list, as well as on a calendar.

3.  To delete a report from the schedule, select the check box next to the report in the list and click **Delete Reports**.

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**See Also:**

Running Job Management Reports

Job Management Reports Overview

# Creating Tasks for Jobs

As you are working with a job in Job Management, you can create a list of tasks and reminders for items that you need to complete for a job. For example, calling a customer to give them an update on shipping dates. Tasks in Job Management are similar to tasks in e-mail programs such as Microsoft Outlook. You can set a task with a system-generated reminder that is sent to your e-mail or

You can create tasks from the Task Manager, as described below, and from job-level notes.

**To create a task for a job:**

1.  From any page in Job management, click **Home** in the menu bar to display the Home page, and then click **Task Manager** in the submenu bar to display the Task manager page.

2.  Enter the following information about the task and click **Create Task**.

| Field | Description |
|---|---|
| **Subject** | The general purpose or a shortened description of the task. The subject you enter here displays in the Task Manager and helps you identify the task. |
| **Description** | A more detailed description of the task that needs completing for the job. |
| **User** | The ID system user responsible for completing the task. |
| **Priority** | The priority of the task. Select **1**, **2**, or **3** to indicate the importance of the task. If you have multiple tasks due on the same day, setting a priority helps you determine in which order to complete the tasks. |
| **Status** | The stage the task is in. Select **Not Started**, **In Progress**, or **Completed** to indicate the task's stage. |
| **Due Date** | The calendar date by which the task needs to be completed. Click the calendar icon ⬛ and select the due date. |
| **Reminder** | The date, if any, on which you want the system to remind you of the task. Select the **Reminder** check box, click the calendar icon ⬛ and select the reminder date. |
| **Reminder Method** | If you selected to send a reminder regarding the task, select whether to receive a reminder by e-mail or by text number and enter the corresponding e-mail address or telephone number. If you send reminders through text messages, the recipients standard text messaging charges apply. |

The task displays in the Task Manager Table. You can update the priority, due date, reminder date and method, and the status within the table for each task. For information about deleting a task, see Managing Your Tasks for Jobs.

# Managing Your Tasks for Jobs

As you are working with a job in Job Management, you can create a list of tasks and reminders for items that you need to complete for a job. For example, calling a customer to give them an update on shipping dates. As you work through tasks while managing a job, you can update and remove tasks from the Task Manager to better manage your jobs.

**To update a task in the task manager:**

1.  From any page in Job management, click **Home** in the menu bar to display the Home page, and then click **Task Manager** in the submenu bar to display the Task Manager page.

    The table at the bottom of the page displays all the tasks assigned to you for the job.

2.  Update the following fields for a task, as necessary:

| Field | Description |
|---|---|
| **Priority** | The priority of the task. Select **1**, **2**, or **3** to indicate the importance of the task. If you have multiple tasks due on the same day, setting a priority helps you determine in which order to complete the tasks. |
| **Due Date** | The calendar date by which the task needs to be completed. Click the calendar icon 🔟 and select the due date. |
| **Reminder** | The date, if any, on which you want the system to remind you of the task. Click the calendar icon 🔟 and select the reminder date. |
| **Reminder Method** | If you selected to send a reminder regarding the task, select whether to receive a reminder by e-mail or by text number and enter the corresponding e-mail address or telephone number. If you send reminders through text messages, the recipients standard text messaging charges apply. |
| **Status** | The stage the task is in. Select **Not Started**, **In Progress**, or **Completed** to indicate the task's stage. |

3.  Click **Save** to save your changes to your tasks.

**To delete a task from the Task Manager:**

1.  From any page in Job management, click **Home** in the menu bar to display the Home page, and then click **Task Manager** in the submenu bar to display the Task Manager page.

    The table at the bottom of the page displays all the tasks assigned to you for the job.

2.  Click the delete icon ✖ next to the task you want to remove.

# Allowing Customers to View Job Information

Job Management allows you to set up contacts for your customers to log in to the application to view information regarding jobs to which they have been awarded. When a contact logs in, they are able to search for and view current and past activity to which their customer is associated including job summary status and shipment summary information available in the **Job Status** tab on the Job Summary page.

In addition, contacts who log in are able to set a user profile for viewing information and to view the online Help.

Allowing customers to log in to your instance of Job Management requires configuration to your firewall to allow users from outside your VPN to access your system. Contact your sales representative or customer support for additional information regarding the setup requirements.

To access Job Management, a contact must meet the following criteria.

- Be associated with a valid customer record. See the Eclipse online help for information about creating contacts and adding them to customer records

- Have a valid Web Commerce login name and password defined in the **Login** and **Password** fields in the Contact WOE Parameters screen. See the procedure below to access the screen.

- The **Enable Job Management Login** field in the Contact WOE Parameters screen for the contact must be set to **Yes**. See the procedure below to access the screen.

**To access the Contact WOE Parameters screen:**

1. From the Eclipse **File** menu, select **Contact** to display the Contact Maintenance screen.

   If you are running Solar Eclipse, select **Maintenance > Contact**.

2. Display the contact to which you want to give login access and use the **WOE** hot key to display the Contact WOE Parameters screen.

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