



Phased Labor

Best Practices for processing labor in increments

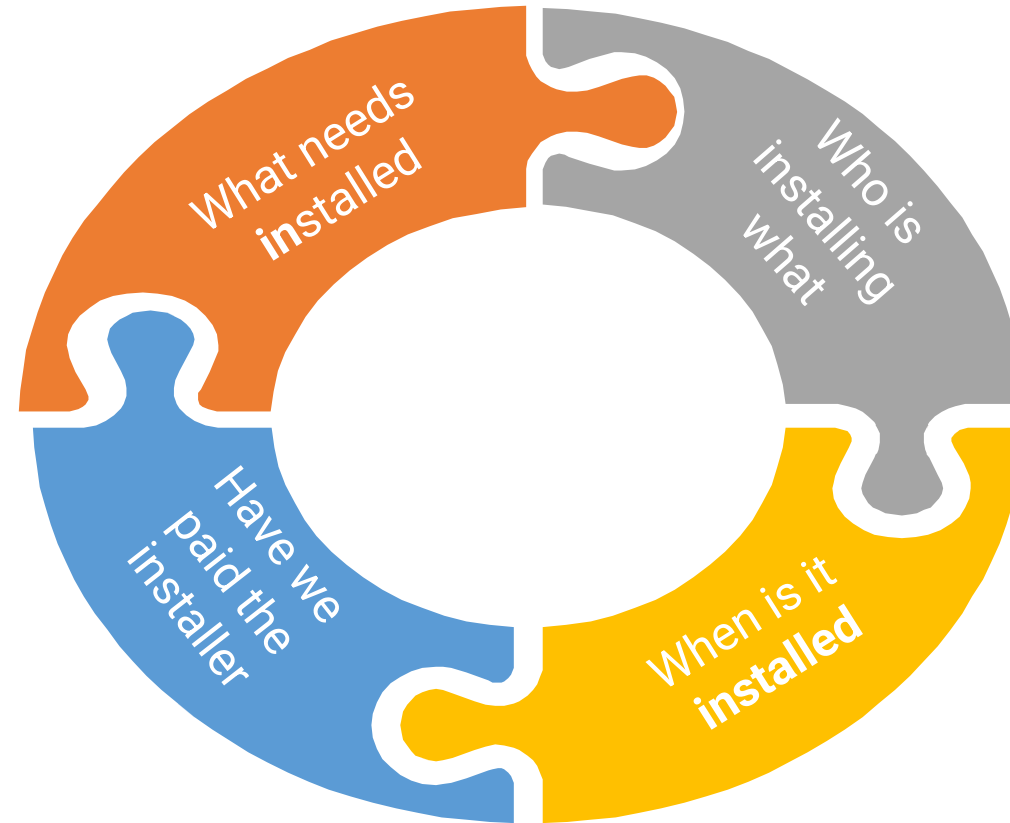
Robin Biffath

The Big Picture



- What is ready to be installed?
- How does the Work Order get processed?
- Who splits the Work Order or creates new Work orders?
- Why is this important?
- WHEN is the Job Costed?
- What needs done in the end of a project (the bits not processed)

What are the Pieces





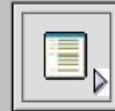
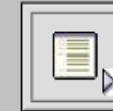
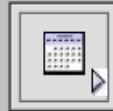
What needs installed

- When it is a larger project the installation of all material will take longer than one pay period.
 - At some point need split into multiples
 - installed by multiple Laborers
- Transfer the material to Work orders and Schedule Based on Expected date of material
 - Use Mission Control to see what has arrived
 - Transfer based on the PO expected date

Creating the Work Orders

Transfer Options ? Web Help

Select From The Transfer Options Below

Purchase Order	Installer Workorder	Invoice	Deposit	Calendar
 PO	 Installer Workorder	 Invoices A/R	 Deposit	 Calendar
<input type="radio"/> PO Remaining <input type="radio"/> PO Custom <input type="radio"/> PO Custom Project	<input type="radio"/> Workorder Remaining <input type="radio"/> Workorder Custom <input checked="" type="radio"/> Workorder Project <input type="radio"/> Workorder Blank	<input checked="" type="radio"/> Invoice Project <input type="radio"/> Invoice Remaining	<input type="radio"/> Primary Customer <input type="radio"/> Secondary Customer	
		Invoice Date: 9/17/2023 Invoice #: <input type="text"/>		

Work Orders



- Select the items needed on the desired Work order
 - It could be based on Product type
 - Or Installer type All Subs have their own and if there are Hourly installers, they need a separate W/O per pay period
- Selecting the needed material by W/O

The screenshot shows a software window titled "Progress Labor Chart". At the top, there are "Cancel" and "Proceed" buttons. Below the title bar, there is a section for "Current Information For Project" with fields for "Sold To" (Capitol Investments) and "1450 Jeppesen Street". A section titled "Detailed Status Of Each Item" includes a "Filter Product Type" dropdown. Below this is a table with columns "Product Type", "Record #", and "Branch". The table contains three rows: "Carpet" (Record # 3024, Branch 1), "LVT" (Record # 3024, Branch 1), and "Prep" (Record # 3024, Branch 1). To the right of the table is a control panel with an "Auto Fill / Clear All" checkbox (checked) and a "New Installer Work Order # Auto Fill / Clear" section with three checkboxes (all checked). A blue arrow points from the "Auto Fill / Clear" section to the "LVT" row in the table.

Product Type	Record #	Branch
Carpet	3024	1
LVT	3024	1
Prep	3024	1

Fix the pieces

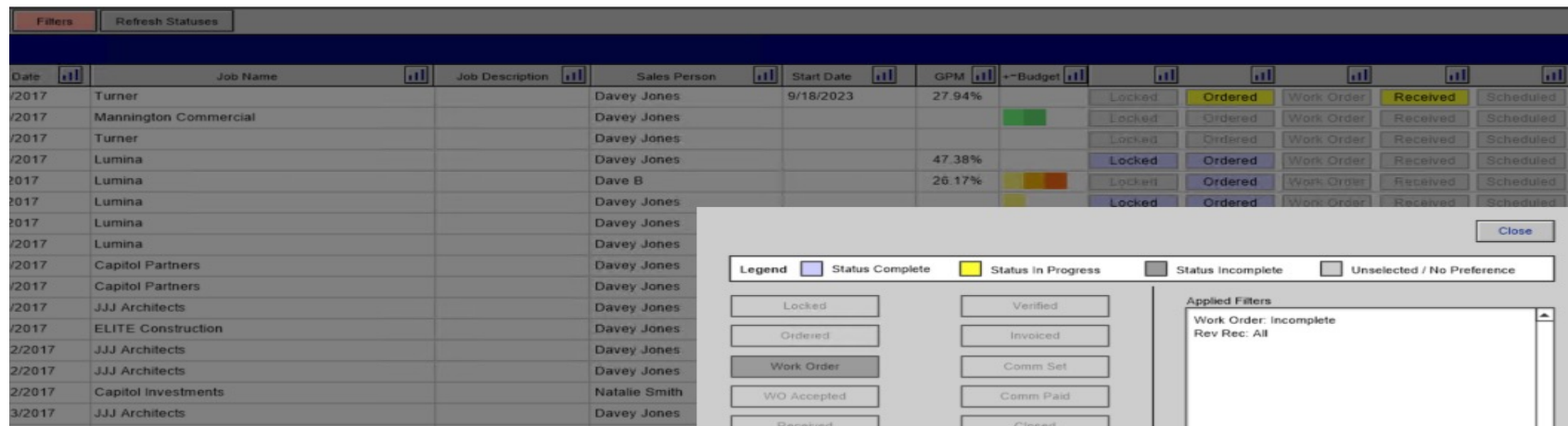


Installation List							
WO #	Job #	Paid	Req D	Job Description	Name	Job Site Address	Lot / Suite #
4581	3024			test wQuan and projected	Capitol Partners	1450 Jeppesen Street	
4582	3024			test wQuan and projected	UES 2023 Work Orders	1450 Jeppesen Street	
4583	3024			test wQuan and projected	UES 2023 Work Orders	1450 Jeppesen Street	

Are there pieces left?

If transferring incrementally what can be used to find Jobs that still need Work Orders created?

Mission Control – create a Filter for Work orders>Incomplete



The screenshot displays a software interface with a table of jobs and a legend for status filters. The table has columns for Date, Job Name, Job Description, Sales Person, Start Date, GPM, +/-Budget, and a series of status buttons. The legend includes Status Complete (blue), Status In Progress (yellow), Status Incomplete (grey), and Unselected / No Preference (white). The Applied Filters section shows 'Work Order: Incomplete' and 'Rev Rec: All'.

Date	Job Name	Job Description	Sales Person	Start Date	GPM	+/-Budget	Locked	Ordered	Work Order	Received	Scheduled
/2017	Turner		Davey Jones	9/18/2023	27.94%		Locked	Ordered	Work Order	Received	Scheduled
/2017	Mannington Commercial		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
/2017	Turner		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
/2017	Lumina		Davey Jones		47.38%		Locked	Ordered	Work Order	Received	Scheduled
2017	Lumina		Dave B		26.17%		Locked	Ordered	Work Order	Received	Scheduled
2017	Lumina		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
2017	Lumina		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
/2017	Capitol Partners		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
/2017	Capitol Partners		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
/2017	JJJ Architects		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
/2017	ELITE Construction		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
2/2017	JJJ Architects		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
2/2017	JJJ Architects		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled
2/2017	Capitol Investments		Natalie Smith				Locked	Ordered	Work Order	Received	Scheduled
3/2017	JJJ Architects		Davey Jones				Locked	Ordered	Work Order	Received	Scheduled

Legend

- Status Complete
- Status In Progress
- Status Incomplete
- Unselected / No Preference

Applied Filters

Work Order: Incomplete
Rev Rec: All

Fix the pieces



- This keeps it clear for the Scheduler
- Aids the installer in submitting labor (especially if they use PS Mobile, Join my session tomorrow)
- Keeps job costing accurate when each Work orders costs are processed

Return	Find	Find All	Export	Refresh	Web Help		
Installation List							
WO #	Job #	Paid	Req Date	Job Description	Name	Job Site Address	
4581	3024		9/21/2023	Carpets install	UES 2023 Work Orders	1450 Jeppesen Street	
4582	3024		9/21/2023	Install LVT	UES 2023 Work Orders	1450 Jeppesen Street	
4583	3024		9/18/2023	Floor Prep	UES 2023 Work Orders	1450 Jeppesen Street	

Place the pieces

By entering a date, the scheduler has an idea of when the install or prep is desired

Many times, this is based of different criteria

- material availability
- phase start
- customer request

POINT FLOORS

Ship To **Community / Plan** Project Manager

Name: Just another jobsite Proj Manager

Address: 1234 Boring Ave Job Description

Site # Base Bid

City: IRVINE State: CA Zip: 90017

Phone: none

Docs | Directions

Comment (Click to Add / View)

Record Info

Work Order # 4537

Job # 2829

Contract # Contract num

Job Start Date 9/19/2023

Install Date

Install Time

Store # / Name

Sales Person

Subcontractor

Installer

September 2023						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
1	2	3	4	5	6	7



- Floor Prep
- Hard Surface
- Kitchen and Bath
- Carpet etc
- Job Start date

Once separate work orders are created, and the Estimated start date is entered,

The scheduler has a usable list

This allows for efficient use of manpower

The ability to place events on the calendar in the correct order

Project Manager: []
Description: []
More info

Work Order # 4369
Job # 2716
Contract # []
Job Start Date 9/19/2023
Install Start Date []
Install End Date []
Store 1 One Point Floors
Sales Person Debbie
Subcontractor Billy Smith
Installer []

So Easy



Installation List						
WO #	Job #	Paid	Req Date	Job Description	Name	Job Site Address
4538	2962		9/25/2023	CT Floor 1	Wares Construction INC	987654 South Main
4539	2962		10/2/2023	CT Floor 2	Wares Construction INC	987654 South Main
4540	2962		10/16/2023	CT Floor 3	Wares Construction INC	987654 South Main
4548	2962		9/19/2023	Floor Prep	Wares Construction INC	987654 South Main

Ohhh NOOOO



- The initial installer's dog got out, wife had a baby, decided to stay in Las Vegas... Someone else needs to finish the job.
- It is a large job and crosses the pay periods
- Basically, something needs to be split to either a different Installer or partially processed.

Splitting the puzzle piece



- If it is one line left to install like base or Grout Sealing
- There is a “torn sheet” of paper on the line to move that line to its own Work Order

- If it is a job that has numerous lines needing split(this is the most common)
- Adjust the quantity to empty or reducing to the amount already installed on this work order
- Return to the job and transfer to a

Line#	Product Description	Color / Item Number	Budgeted Unit \$	Verified Unit \$	Verified Ext \$	Submitted Unit \$	Submitted Ext \$	Diff \$	Actions
1	Jrdex V1200 Self Leveling Underlayment	50 # Bag							
2	Standard Floor Prep	Common Area	\$30.00	\$30.00	\$1,200.00				
7	Urban Lines BL	Copper							
7	Install Carpet Glue Down	Corridor	\$4.00	\$4.00	\$2,100.00				
8	New Broadlock Broadloom Adhesive - 4 Gallon	4 Gallon							
8	Install Millwork Base	Common and Corridor	\$1.25	\$1.25	\$2,500.00				

Line#	Product Description	Material	Quantity	Unit	Description
2953	Wall Base	Materials	1954	LF	4 5" Millwork Mandalay Mw-Xx-H
Line# 6	Labor	Labor	2000	Hour	Install Millwork Base
2953	Wall Base	Materials	40	Each	Mapei #575 Cove Base Adhesive (Stocked)
Line# 7	Labor	Labor		Hour	
2643	LVT	Materials	600	SF	Standard Floor Prep
Line# 8	Labor	Labor		Hour	

Have we paid the installer yet?

Subcontractor

Each Work order will have costs associated

The costs are provided by the Installer

Costs are reviewed by "The Person"

Costs are Accepted /Posted creating the Payable

One Point Floors 2 of 7 472

Contact / Phone Ship To Community / Plan Project Manager

Name: Capitol Partners Job Description

Address: 1450 Jeppesen Street Phase 1 Cpt

Lot / Suite # City, State, Zip Phone Fax

CO 80125 Conifer CO 80125

Cell Store Sales Person Subcontractor Installer

1 One Point Floors Zoe Zeller Dean McDean DEAN MCDEAN | 678

Quan	Quan Submitted	Unit	Product Description	Color / Item Number Area	Budgeted Unit \$	Verified Unit \$	Verified Ext \$	Submitted Unit \$	Submitted Ext \$	Submitted Diff \$	Actions
500		SqYd	Kings Road 8kr420630r	880320 Ecu							
500		Hour	Stretch in Carpet with Pad		\$3.50	\$3.25	\$1,625.00				
10		Each	Parabond 4 Gallon 4099 (low ... Per Bucket)	4 Gallon							
		Each									
		Hour									

Cost Per Hour Distribution

Total Hours:

Cost Per Hour:

Totals	
Submitted Labor Total	
Labor Total	\$1,625.00
Total	\$1,625.00

Have we paid the installer yet?

Subcontractor

Each Work order will have costs associated

Thus, costing the job as it goes along keeping the Cost to date accurate

Any additional items added to the Work order show on the Profits tab under Additional Transactions

List View Print Bills Due Quick Pay Accept Accept & Post

Not Submitted 7 472

One Point Floors

Record Info

Work Order # 4247
 Job # 2202
 Contract #
 Job Start Date 4/21/2021
 Install Date 4/29/2021
 Install Time
 Store 1 One Point Floors
 Sales Person Zoe Zeller
 Subcontractor Dean McDean
 Installer DEAN MCDEAN | 678

Ship To Community / Plan Project Manager

Name Capitol Partners
 Address 1450 Jeppesen Street
 Suite #
 City, State, Zip Connifer, CO 80125
 Phone Fax
 Cell

Job Description Phase 1 Cpt

Mrx Installer Costs Default Costs

Color / Item Number Area	More Lines	Budgeted Unit \$	Verified Unit \$	Verified Ext \$	Submitted Unit \$	Sub
880320 Ecru		\$3.50	\$3.25	\$1,625.00		
Also, please cover all electronics due to dusty conditions.						
bucket)	4 Gallon					
Entry Border			\$30.00	\$30.00		

Have we paid the installer yet?

Hourly Laborers

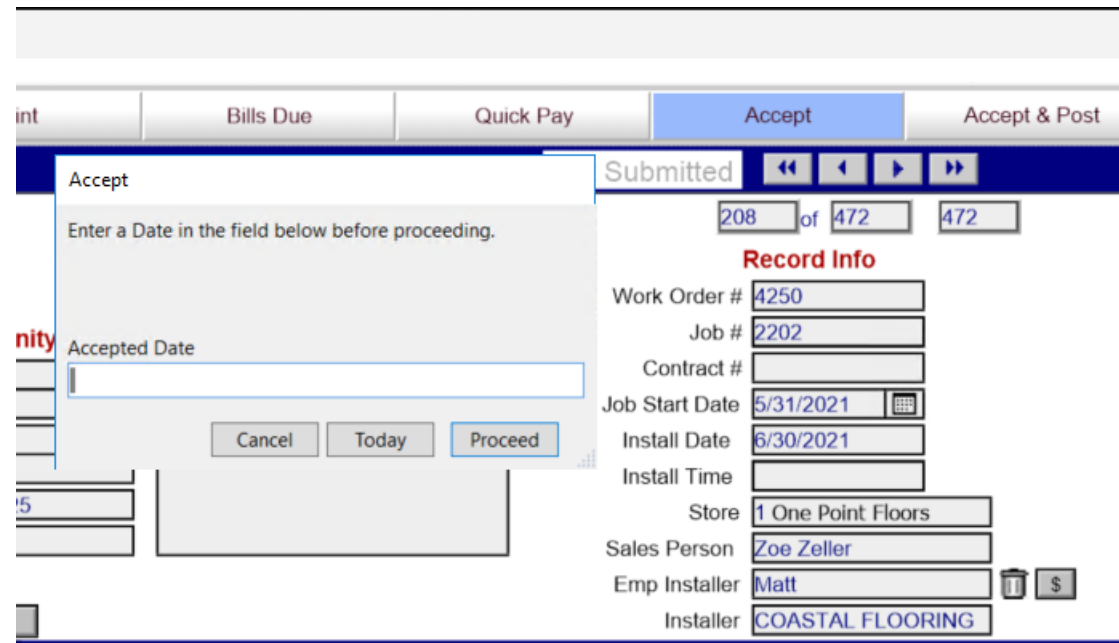
Since the in-house installers have their own Work Order, at the end of each Pay period the Hourly Labor Matrix can be used to send the Hours and costs to the Work order per worker

- Payroll
- New
- Create the label(generally the period)
- Select installers
- post

Hourly Labor Detail													
Return		Post		Sort		Export		Import		Print		Mobile Time Grid	
Posting ID	Payroll Posting Date	Posted By	Description										
271	9/19/2023	Robin B	Week Ending 09/22/2023										
Post Date	Work Date	Job #	Work Order #	Project #	Installer Position	Regular Rate	Shift Rate	Overtime Rate	Doubletime Rate	Total Hours	Extended Si		
9/19/2023	9/19/2023	2202	4250	2202 - Capitol Partners PRP Phase 2	Delivery Truck 1	2.00				2.00	\$24.00		
					Apprentice	\$12.00	\$15.00	\$18.00	\$24.00				
9/19/2023	9/19/2023	2202	4250	2202 - Capitol Partners PRP Phase 2	Dean McDean	10.00				10.00	\$120.00		
					Apprentice	\$12.00	\$15.00	\$18.00	\$24.00				
9/19/2023	9/19/2023	2202	4250	2202 - Capitol Partners PRP Phase 2	Elizabeth Hourly	10.00				10.00	\$250.00		
					Journeyman Level 5	\$25.00	\$27.00	\$30.00	\$50.00				

Is the Job Costed yet?

Once all the Hours from the HLM are processed and the pay period is ended the Period Work Order can be Accepted and the costs will then hit the Job

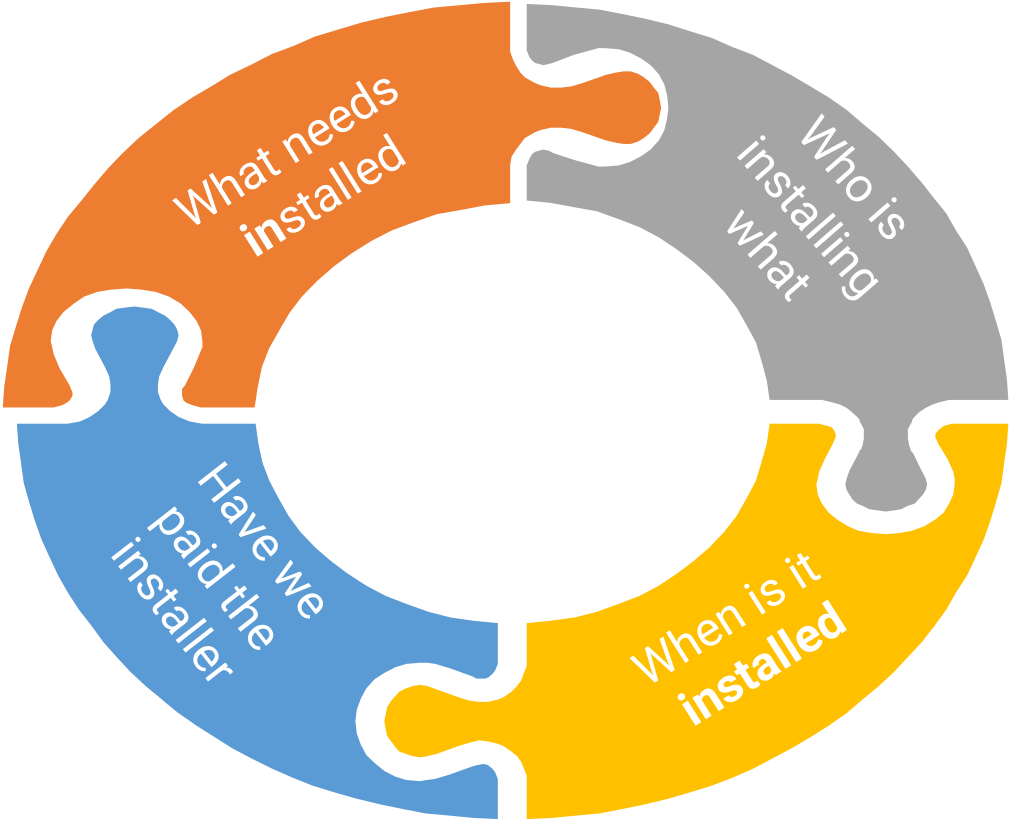


The screenshot shows a software interface with a navigation bar at the top containing buttons for 'int', 'Bills Due', 'Quick Pay', 'Accept', and 'Accept & Post'. The 'Accept' button is highlighted. Below the navigation bar, there is a 'Submitted' status bar with navigation arrows and a page indicator showing '208 of 472' records. The main content area displays 'Record Info' for a work order with the following details:

- Work Order #: 4250
- Job #: 2202
- Contract #: [Empty]
- Job Start Date: 5/31/2021
- Install Date: 6/30/2021
- Install Time: [Empty]
- Store: 1 One Point Floors
- Sales Person: Zoe Zeller
- Emp Installer: Matt
- Installer: COASTAL FLOORING

An 'Accept' modal dialog is open, prompting the user to 'Enter a Date in the field below before proceeding.' It features an 'Accepted Date' input field and three buttons: 'Cancel', 'Today', and 'Proceed'.

All the Pieces Fit



Next Up: Breakout #4 4:15 – 5:00 pm

- Claims Module Best Practices – Griffin Ballroom
- Multi Unit Proposals – Belle Meade Room
- Estimation Integration with JobRunner & FloorManager –
Arlington Room