



# Profit & Cost Trend Tools

An Overview of Features for Analyzing Job Profits and Costs

Bekah Billman (Barber)

# Improved Methodology & New Features

(Version 22 and newer)



- Improved method/formula for tracking Actual Costs
- New Trending Costs features
- New "artificial" Cost Adjustment feature (JR)
- New Budget Adjustment feature (JR)

# Actual Costs: Explained



- "Actual" in previous versions:
  - A cumulative blend of budgeted costs and incremental verified costs-to-date. (AKA "Projected Costs")
  
- "Actual" in versions v22b8 and newer:
  - "Act. Cost Landed" & "Act. Cost Extended" will display a value once the line (Material or Labor) has been fully verified.

# JobRunner: Actual Cost Landed

## *Material*



(Version 22 and newer)

- RevRec material line items: Will display an "Actual" value once the full quantity has been verified.
  - Material value is automatically coded to your COGS GL
- Stock material line items: Will display an "Actual" value once the full Inventory record quantity has been verified and the line item quantity has been delivered.
  - Material will move from your Inventory GL to your COGS GL after completing the delivery.

# FloorManager: Actual Cost Landed Material & Labor



- Material & Labor line items: Will display an "Actual" value once the full line quantity has been verified.

# Actual Cost Landed

(Versions 22 and newer)



- Act. Cost Landed field will highlight in Red, Green, or Light Grey when verifications have been made against the inventory or labor on the line.
  - **Red**: costs higher than budget
  - **Green**: costs lower than budget
  - **Grey**: costs matching the budget

Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Over Head	Act Cost Landed
\$10.00	\$1.00				
\$5.75				\$0.29	
Notes Installer					
\$10.00	\$1.00			\$0.55	
\$5.75				\$0.00	
Notes Installer					
\$2.00					
Notes Installer					

# Partially Verified Materials



Delete Find Find All Print Transfer List View Change Order Lock Close Comm Set Comm Paid Template Sessions Export Valid

Unlocked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete

**Job** *One Point Floors* 20 of 20

**Sold To** **Contact / Phone**

Star 10 Contractors

890 Industrial Way

San Francisco CA 90562

Fax

**Ship To** **Community / Plan**

Name: Star 10 Contractors

Address: 890 Industrial Way

Lot / Suite #: San Francisco CA 90562

Phone: Start Date:

Job Start Date: \_\_\_\_\_

Owner: \_\_\_\_\_

General Contractor: \_\_\_\_\_

Architect: \_\_\_\_\_

Designer: \_\_\_\_\_

Project Manager: \_\_\_\_\_

Accounting Manager: \_\_\_\_\_

Line Of Business: \_\_\_\_\_

Job Description: Carpet Material & Install

Project # B033

Job # B033 Customer PO UES 2023

Date 9/15/2023 Plan Date

Store 1 One Point Entry Person Bekah

Sales Person 1 Bekah

Sales Person 2

Entry CRM Activites Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket GPM Forms Project

Filter Mat / Lab Filter Product Type Filter Procurement Filter Job Progress Filter Job Costs Show Parameters Show Budget

**Additional Transactions**

Date	Record #	Name	Quan	Unit	Description	Cost	Total

**Budgeted Versus Projected Profits Comparison**

	Budgeted	Projected	Difference	Cost To Date All
Total Job Cost				
Total Job Profit				
Total Job GPM				

Navigator Opportunity Proposal Installer Workorder Customer Payments PO Product Catalog Calendar Invoices A/R Bills A/P

# Fully Verified Materials (JobRunner)



[Delete](#) | [Find](#) | [Find All](#) | [Print](#) | [Transfer](#) | [List View](#) | [Change Order](#) | [Lock](#) | [Close](#) | [Comm Set](#) | [Comm Paid](#) | [Template](#) | [Sessions](#) | [Export](#) | [Valid](#)

[Unlocked](#) | [Ordered](#) | [Work Order](#) | [Received](#) | [Scheduled](#) | [Delivered](#) | [Verified](#) | [Invoiced](#) | [Comm Set](#) | [Comm Paid](#) | [Closed](#) | [% Comp](#) | [Job Start Date](#) | [Install Complete](#)

**Job** *One Point Floors* 1 of 1

**Sold To** **Contact / Phone**

Star 10 Contractors

890 Industrial Way

San Francisco CA 90562

Fax

**Ship To** **Community / Plan**

Name: Star 10 Contractors

Address: 890 Industrial Way

City, State, Zip: San Francisco CA 90562

Phone: Start Date

Job Start Date

Owner

General Contractor

Architect

Designer

Project Manager

Accounting Manager

Line Of Business

Job Description: Carpet Material & Install

Project # 3033

Job # 3033 Customer PO UES 2023

Date 9/15/2023 Plan Date

Store 1 One Point Entry Person Bekah

Sales Person 1 Bekah

Sales Person 2

[Entry](#) | [CRM Activites](#) | [Upgrades](#) | [Bundle](#) | [Status](#) | [Profits](#) | [Chg Orders](#) | [Job Mail](#) | [Pick Ticket](#) | [GPM](#) | [Forms](#) | [Project](#)

[Filter Mat / Lab](#) | [Filter Product Type](#) | [Filter Procurement](#) | [Filter Job Progress](#) | [Filter Job Costs](#)

Type	S.Quan	W.Quan	Unit	Length Width	ID#	Product Description Labor Type / Labor Description	Color / Item Number Area	Kits	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Over Head	Act Cost Landed	Act Cost Extended	Actual GPM	Variation
Carpet	500		SY		5964	SHAW Archeology 5a143	Shoreline	A		\$10.00	\$1.00				\$12.00	\$6,000.00	18.20%	V
Line# 1	500		SY	12	5	Carpet Install Carpet over pad with Pattern Match	Master & Guest Bedrooms			\$5.75				\$0.29				
Notes Customer	Installer																	
Carpet	500		SY		5949	SHAW Alchemy 50746	46517 Uranium	A		\$10.00	\$1.00			\$0.55	\$10.50	\$5,250.00	31.82%	V
Line# 2	500		SY	12	8	Carpet Install Carpet over pad with Pattern Match	Master & Guest Bedrooms			\$5.75				\$0.00				
Notes Customer	Installer																	
Pad	1000		SY		3896	LEGGETT Rebond Pad 3/8" 8lb	3/8" 8 Lb Density	A		\$2.00								
Line# 3					6													
Notes Customer	Installer																	
Labor																		

**Additional Transactions**

Date	Record #	Name	Quan	Unit	Description	Cost	Total

**Budgeted Versus Projected Profits Comparison**

	Budgeted	Projected	Difference	Cost To Date All
Total Job Cost	\$21,568.80	\$21,543.80	\$25.00	
Total Job Profit	\$7,196.20	\$7,221.20	-\$25.00	
Total Job GPM	25.02%	25.10%		

[Navigator](#) | [Opportunity](#) | [Proposal](#) | [Installer Workorder](#) | [Customer Payments](#) | [PO](#) | [Product Catalog](#) | [Calendar](#) | [Invoices A/R](#) | [Bills A/P](#)



# Stock Line Item-Delivered (JobRunner)



Delete Find Find All Print Transfer List View Change Order Lock Close Comm Set Comm Paid Template Sessions Export Valid

Unlocked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete

**Job** *One Point Floors* 1 of 1

**Sold To** **Contact / Phone**

Star 10 Contractors

890 Industrial Way

San Francisco CA 90562

**Ship To** **Community / Plan**

Name: Star 10 Contractors

Address: 890 Industrial Way

City, State, Zip: San Francisco CA 90562

Job Start Date:

General Contractor:

Architect:

Designer:

Project Manager:

Accounting Manager:

Line Of Business:

Job Description: Carpet Material & Install

Project # 3033

Job # 3033 Customer PO UES 2023

Date 9/15/2023 Plan Date

Store 1 One Point Entry Person Bekah

Sales Person 1 Bekah

Sales Person 2

Entry CRM Activites Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket GPM Forms Project

Filter Mat / Lab Filter Product Type Filter Procurement Filter Job Progress Filter Job Costs Show Parameters Show Budget

Type	S.Quan	W.Quan	Unit	Length Width	ID#	Product Description	Labor Type / Labor Description	Color / Item Number Area	Kits	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Over Head	Act Cost Landed	Act Cost Extended	Actual GPM	Varian
Carpet	500		SY		5964	SHAW Archeology 5a143		Shoreline	A		\$10.00	\$1.00				\$12.00	\$6,000.00	18.20%	V
Line# 1	500		SY	12	5	Carpet	Install Carpet over pad with Pattern Match	Master & Guest Bedrooms			\$5.75				\$0.29				
Notes	Customer Installer																		
Carpet	500		SY		5949	SHAW Alchemy 50746		46517 Uranium	A		\$10.00	\$1.00			\$0.55	\$10.50	\$5,250.00	31.82%	V
Line# 2	500		SY	12	8	Carpet	Install Carpet over pad with Pattern Match	Master & Guest Bedrooms			\$5.75				\$0.00				
Notes	Customer Installer																		
Pad	1000		SY		3896	LEGGETT Rebond Pad 3/8" 8lb		3/8" 8 Lb Density	A		\$2.00								
Line# 3					6														
Notes	Customer Installer																		
Labor																			

**Additional Transactions**

Date	Record #	Name	Quan	Unit	Description	Cost	Total

**Budgeted Versus Projected Profits Comparison**

	Budgeted	Projected	Difference	Cost To Date All
Total Job Cost				
Total Job Profit				
Total Job GPM				

Navigator Opportunity Proposal Installer Workorder Customer Payments PO Product Catalog Calendar Invoices A/R Bills A/R

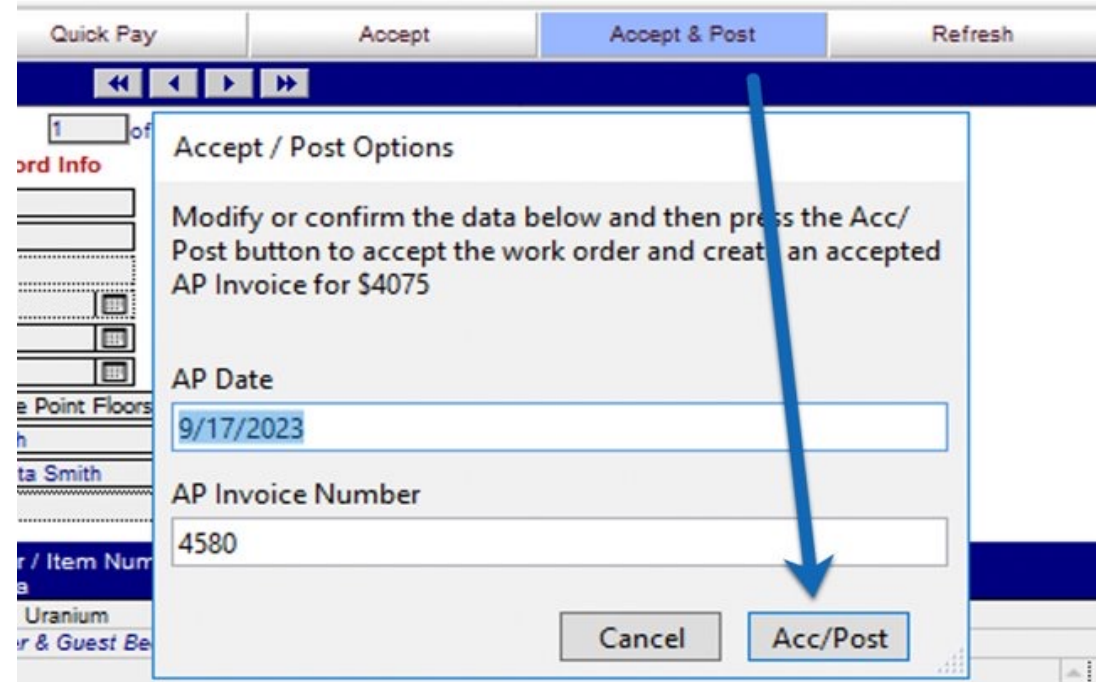
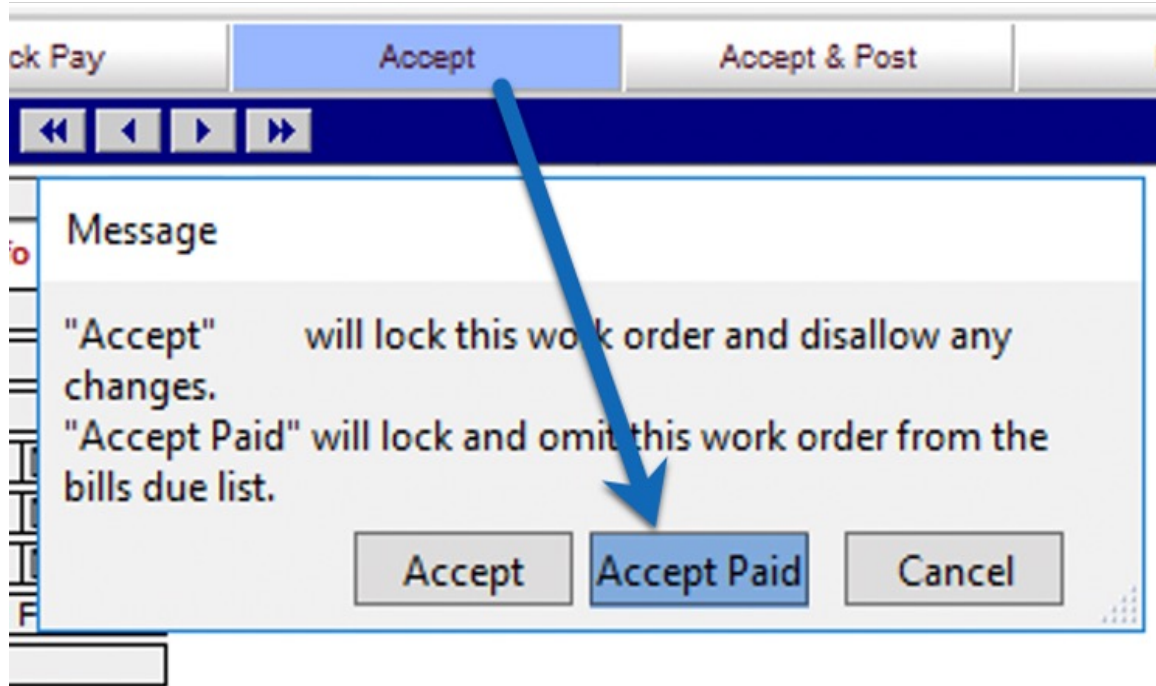
# Actual Cost Landed - Labor

(Version 22 and newer)



- Labor line items: displays an "Actual" cost once the full quantity has been transferred to an Installer Workorder and has been either Accepted as Paid, or Accepted & Posted.

# Actual Cost Landed – Labor (Version 22 and newer)



# Partially Verified Labor



File Edit View Insert Format Records Scripts Window Help

Delete Find Find All Print Transfer List View Change Order Lock Close Comm Set Comm Paid Template Sessions Export Validate Refresh Web Help Settings

Unlocked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete Mission Control

## Job One Point Floors

Job Start Date: [ ] Project # 8033

Owner: [ ] Job # 8033 Customer PO: [ ]  
 General Contractor: [ ] Architect: [ ]  
 Designer: [ ] Date: 8/15/2023 Plan Date: [ ]  
 Project Manager: [ ] Store: [ ] Entry Person: [ ]  
 Accounting Manager: [ ] Line Of Business: [ ] Sales Person 1: [ ]  
 Job Description: Carpet Material & Install Sales Person 2: [ ]

Q Sold To: Star 10 Contractors Contact / Phone: [ ] Ship To: Star 10 Contractors Community / Plan: [ ]  
 890 Industrial Way Name: Star 10 Contractors  
 San Francisco, CA 94052 Address: 890 Industrial Way  
 Lot / Suite # [ ] City, State, Zip: San Francisco, CA 94052  
 Phone: [ ] Start Date: [ ]

Entry CRM Activities Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket GPM Forms Project

Filter Mat / Lab Filter Product Type Filter Procurement Filter Job Progress Filter Job Costs Clear Filtering Show Budget Entry Actual More Lines

Type	S	Quan	W	Quan	Unit	Length	IDW	Product Description	Color / Item Number	Kit	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Over Head	Ad Cost Landed	Act Cost Extended	Actual GPM	Variance From Orig. Bgdt	Total Profit	Sell	Sell Extended	Date	
Carpet		500			SY		5964	SHAW Archeology 5a143	Shoreline			\$10.00	\$1.00				\$0.29	\$12.00	\$0,000.00	18.20%	-\$500.00	\$1,335.00	\$14.67	\$7,335.00	9/15/2023
Line# 1		500			SY	12	5	Carpet Install Carpet over pad with Pattern Match	Master & Guest Bedrooms			\$5.79										\$1,008.25	\$8.05	\$4,025.00	
Notes																									
Customer																									
Carpet		500			SY		5948	SHAW Alchemy 50748	48517 Uranium			\$10.00	\$1.00				\$0.55	\$10.50	\$5,250.00	31.82%	\$525.00	\$2,450.00	\$15.40	\$7,700.00	9/15/2023
Line# 2		500			SY	12	8	Carpet Install Carpet over pad with Pattern Match	Master & Guest Bedrooms			\$5.79										\$969.97	\$7.67	\$3,835.00	
Notes																									
Customer																									
Pad		1000			SY		3896	LEGGETT Rebond Pad 3/8" 8lb	3/8" 8 Lb Density			\$2.00					\$2.20	\$2,200.00	17.80%	-\$200.00	\$470.00	\$2.67	\$2,670.00	9/15/2023	
Line# 3							6																		
Notes																									
Customer																									
Labor		8000			SF			Floor Prep Standard Floor Prep				\$0.33					\$0.00					\$799.98	\$4.40	\$3,200.00	9/15/2023
Line# 4																									
Notes																									
Customer																									

Additional Transactions

Date	Record #	Name	Quan	Unit	Description	Rev Entry	Cost	Total

Budgeted Versus Projected Profits Comparison

More Details	Budgeted	Projected	Difference	Cost To Date All
Total Job Cost	\$21,568.80	\$21,743.80	-\$175.00	
Total Job Profit	\$7,198.20	\$7,021.20	\$175.00	
Total Job GPM	25.02%	24.41%		

Totals

Refresh Totals	Totals
Grand Total	\$28,765.00
Payments	
Balance	\$28,765.00

Navigator Opportunity Proposal Installer Workorder Customer Payments PO Product Catalog Calendar Invoices A/R Bills A/P Inventory Job Mail

# Fully Verified Labor



Navigation: Delete, Find, Find All, Print, Transfer, List View, Change Order, Look, Template, Sessions, Export, Refresh, Web Help, Settings

Job: **One Point Floors** | Project # 6033 | 1 of 1

**Sold To:** Star 10 Contractors, 723, 890 Industrial Way, San Francisco, CA 94062

**Ship To:** Star 10 Contractors, UES 2023, 890 Industrial Way, San Francisco, CA 94062

**Job Details:** Job Start Date, General Contractor, Architect, Designer, Project Manager, Accounting Manager, Line Of Business, Job Description: Carpet Material & Install

**Project Info:** Project # 6033, Customer PO, Job # UES 2023, Date 8/15/2023, Plan Date, Store One Point, Entry Person Bekah, Sales Person 1, Bekah (100%), Sales Person 2

Filter Mat / Lab, Filter Product Type, Filter Procurement, Filter Job Progress, Filter Job Costs

Type	S	Quan	W	Quan	Unit	Length	ID#	Product Description	Labor Type / Labor Description	Color / Item Number	Area	Sell	Total	Actions
Carpet	Materials	500			SY		5984 SHAW	Archeology 58143	Install Carpet over pad with Pattern Match		Shoreline	\$14.67	\$7,335.00	
Line# 1	Labor	500			SY	12	5	Carpet	Install Carpet over pad with Pattern Match		Master & Guest Bedrooms	\$8.05	\$4,025.00	
Notes	Notes Q, PO, Installer													
Customer	Customer													
Carpet	Materials	500			SY		5949 SHAW	Alchemy 50746	Install Carpet over pad with Pattern Match		46517 Uranium	\$15.40	\$7,700.00	
Line# 2	Labor	500			SY	12	8	Carpet	Install Carpet over pad with Pattern Match		Master & Guest Bedrooms	\$7.67	\$3,835.00	
Notes	Notes Q, PO, Installer													
Customer	Customer													
Pad	Materials	1000			SY		3896 LEGGETT	Rebond Pad 3/8" 8lb			3/8" 8 Lb Density	\$2.67	\$2,670.00	
Line# 3	Labor						6							
Notes	Notes Q, PO, Installer													
Customer	Customer													
Labor	Materials				SF				Floor Prep		Standard Floor Prep	\$4.00	\$3,200.00	
Line# 4	Labor	8000												
Notes	Notes Q, PO, Installer													
Customer	Customer													

Information: Q Conditions General, Terms Net 30

Here you will see the "Z" SALE Conditions printed. There is no character limit for Conditions "Z".

Actions	Totals
Refresh Totals	Labor \$11,050.00
Details / Signature	Materials \$17,705.00
	Sales Tax
	<b>Grand Total \$28,755.00</b>
	Payments
	<b>Balance \$28,755.00</b>

Navigator: Opportunity, Proposal, Installer Workorder, Customer Payments, PO, Product Catalog, Calendar, Invoices A/R, Bills A/P, Inventory, Job Mail

# JobRunner vs FloorManager Actual Cost Landed Qualifiers (Summary)



- JobRunner: Material & Labor lines will display an Act. Cost Landed value when they are fully verified (Stock items are an exception to this-these must be delivered)
- FloorManager: Materials & Labor lines will display an Act. Cost Landed when they are fully verified.

# Budgeted Costs vs Trending Costs



- Budgeted: Captured and locked at the time of transferring the proposal to a sale. (With the exception of a "budget adjustment")

This does not apply to FloorManager.

- Trending: Captures AP verifications to material and labor, and projects according to unit cost trends

# Trending Cost Window



Delete Find Find All Print Transfer List View Change Order Unlock Template Sessions Export Refresh Web Help Settings

Locked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete

## Job *One Point Floors*

Job Start Date:  Project #

Owner:  Job #  Customer PO:

General Contractor:  Date:  Plan Date:

Architect:  Store:  Entry Person:

Designer:  Sales Person 1:  100%

Project Manager:  Sales Person 2:

Accounting Manager:

Line Of Business:  Job Description:

Ship To: **Star 10 Contractors** | Community / Plan:

Name:  Location:

Address:  Lot / Suite #:

City, State, Zip:  Phone:  Fax:

Sold To: **Star 10 Contractors** | Contact / Phone:

Address:  City, State, Zip:  Phone:  Fax:

Entry CRM Activities Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket Forms Project Sitefotos

Filter Mat / Lab Filter Product Type Filter Procurement Filter Job Progress Filter Job Costs Clear Filtering More Lines

Type	S	Quan	W	Quan	Unit	Length	ID#	Product Description	Labor Type / Labor Description	Color / Item Number Area	Sell	Total	Actions
Carpet	Materials	500			SY		5964	SHAW Archeology 5a143	Shoreline		\$14.67	\$7,335.00	
Line# 1	Labor	500			SY	12	5	Carpet	Install Carpet over pad with Pattern Match	Master & Guest Bedrooms	\$8.05	\$4,025.00	
Notes	<a>Notes</a> <a>Installer</a> <a>Customer</a>												
Carpet	Materials	500			SY		5949	SHAW Alchemy 50746	46517 Uranium		\$15.40	\$7,700.00	
Line# 2	Labor	500			SY	12	8	Carpet	Install Carpet over pad with Pattern Match	Master & Guest Bedrooms	\$7.67	\$3,835.00	
Notes	<a>Notes</a> <a>Installer</a> <a>Customer</a>												
Pad	Materials	1000			SY		3896	LEGGETT Rebond Pad 3/8" 8lb	3/8" & 8 Lb Density		\$2.67	\$2,670.00	
Line# 3	Labor						6						
Notes	<a>Notes</a> <a>Installer</a> <a>Customer</a>												
Labor	Materials	8000			SF			Floor Prep	Standard Floor Prep		\$ .40	\$3,200.00	
Line# 4	Labor												
Notes	<a>Notes</a> <a>Installer</a> <a>Customer</a>												

Information Actions Totals Jump to Line

Refresh Totals Details / Signature

Labor	\$11,060.00
Materials	\$17,705.00
Sales Tax	
<b>Grand Total</b>	<b>\$28,765.00</b>
Payments	
Balance	\$28,765.00

Conditions  Terms

Here you will see the "2" SALE Conditions printed. There is no character limit for Conditions "2".

Navigator Opportunity Proposal Installer Workorder Customer Payments PO Product Catalog Calendar Invoices A/R Bills A/P Inventory Job Mail



# Procurement Cost Changes



- Ability to insert an "artificial" cost on a line when it differs from the original budget.
  - Does *not* affect the job's original & true budget
  - Will transfer the inserted cost to a purchase order and/or work order
  - FloorManager: Costs can be changed along with the Budget because FloorManager does not have WIP reporting.

# Procurement Cost Change (JR)



[Delete](#) [Find](#) [Find All](#) [Print](#) [Transfer](#) [List View](#) [Change Order](#) [Look](#) [Close](#) [Comm Set](#) [Comm Paid](#) [Template](#) [Sessions](#) [Export](#) [Validate](#) [Refresh](#) [Web Help](#) [Settings](#)

[Unlocked](#) [Ordered](#) [Work Order](#) [Received](#) [Scheduled](#) [Delivered](#) [Verified](#) [Invoiced](#) [Comm Set](#) [Comm Paid](#) [Closed](#) [% Comp](#) [Job Start Date](#) [Install Complete](#)

**Job** *One Point Floors*

Job Start Date: \_\_\_\_\_ Owner: \_\_\_\_\_  
 General Contractor: \_\_\_\_\_ Architect: \_\_\_\_\_  
 Designer: \_\_\_\_\_ Project Manager: \_\_\_\_\_  
 Accounting Manager: \_\_\_\_\_ Line Of Business: \_\_\_\_\_  
 Job Description: Carpet Material & Install

Project # 5035  
 Job # 5035 Customer PO  
 Date 09/15/2023 Plan Date  
 Store One Point Entry Person  
 Sales Person 1 Bekah  
 Sales Person 2 \_\_\_\_\_

Sold To: Star 10 Contractors Contact / Phone: \_\_\_\_\_  
 Name: Star 10 Contractors Ship To: \_\_\_\_\_ Community / Plan: \_\_\_\_\_  
 Address: 850 Industrial Way Address: 850 Industrial Way  
 City, State, Zip: San Francisco, CA, 90562 City, State, Zip: San Francisco, CA, 90562  
 Phone: \_\_\_\_\_ Start Date: \_\_\_\_\_

[Entry](#) [CRM Activities](#) [Upgrades](#) [Bundle](#) [Status](#) [Profits](#) [Chg Orders](#) [Job Mail](#) [Pick Ticket](#) [GPM](#) [Forms](#) [Project](#)

[Filter Mat / Lab](#) [Filter Product Type](#) [Filter Procurement](#) [Filter Job Progress](#) [Filter Job Costs](#) [Clear Filtering](#)

Type	S	Quan	W	Quan	Unit	Length	ID#	Product Description	Labor Type / Labor Description	Color / Item Number	Area	Kits	Actions	Unit Cost	Freight 1 Cost	Freight 2 Cost	Tax Cost	Over Head	Act Cost Landed	Act Cost Extended	Actual GPM	Variance From Orig Bdgt	Total Profit	Sell	Sell	Date
Carpet	500				SY	12	5964 SHAW	Archeology 2s143	Install Carpet over pad with Pattern Match	Shoreline	Master & Guest Bedrooms	X	[Icons]	\$10.00	\$1.00				\$0.25				\$1,835.00	\$14.67	\$7,335.00	9/15/2023
Notes	Q																									
Customer																										
Carpet	500				SY	12	5949 SHAW	Alchemy 50746	Install Carpet over pad with Pattern Match	46517 Uranium	Master & Guest Bedrooms	X	[Icons]	\$10.00	\$1.00				\$0.55				\$1,925.00	\$15.40	\$7,700.00	9/15/2023
Notes	Q																									
Customer																										
Pad	1000				SY		3890 LEGGETT	Rebond Pad 3/8" 8lb		3/8" 8 Lb Density		X	[Icons]	\$2.00									\$870.00	\$2.67	\$2,670.00	9/15/2023
Notes	Q																									
Customer																										
Labor	8000				SF			Floor Prep	Standard Floor Prep			X	[Icons]	\$0.50					\$0.00				\$799.98	\$0.40	\$3,200.00	9/15/2023
Notes	Q																									
Customer																										

[Additional Transactions](#)

Date	Record #	Name	Quan	Unit	Description	Rev Entry	Cost	Total

[Budgeted Versus Projected Profits Comparison](#)

	Budgeted	Projected	Difference	Cost To Date At
Total Job Cost	\$21,568.80	\$18,893.77	\$2,675.03	
Total Job Profit	\$7,196.20	\$10,071.23	-\$2,875.03	
Total Job GPM	25.02%	35.01%		

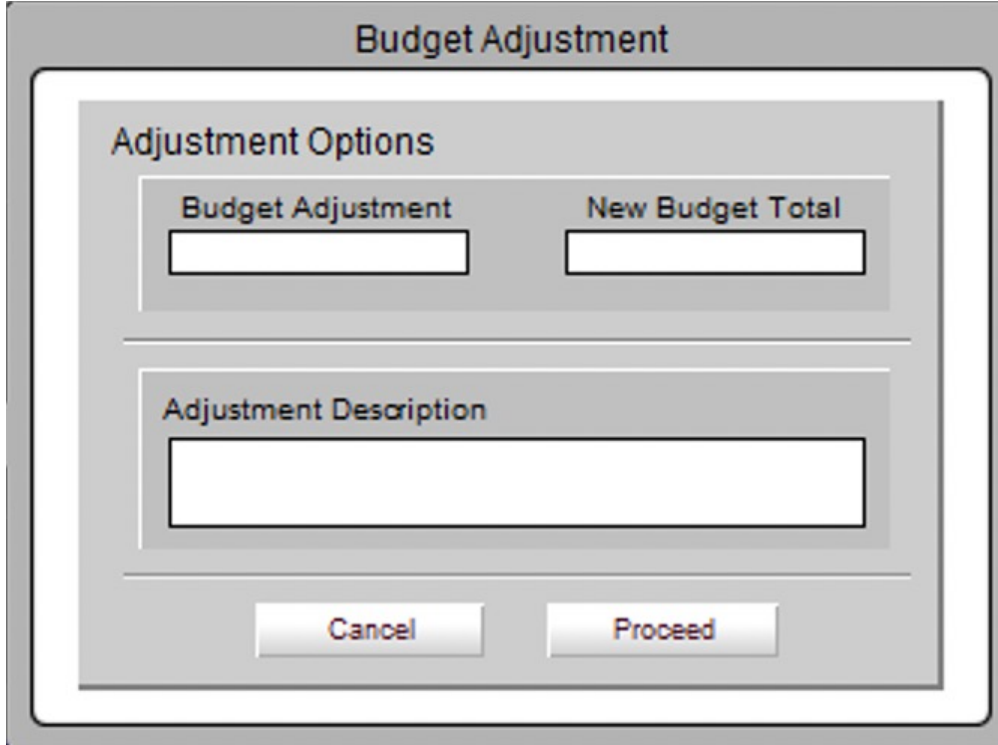
[Job Analysis](#)

Totals	Grand Total
Total Job Cost	\$28,765.00
Payments	
Balance	\$28,765.00

[Navigator](#) [Opportunity](#) [Proposal](#) [Installer Workorder](#) [Customer Payments](#) [PO](#) [Product Catalog](#) [Calendar](#) [Invoices A/R](#) [Bills A/P](#) [Inventory](#) [Job Mail](#)

# Budget Adjustment (JR)

- Ability to change the budget on a Job for the purpose of tracking your WIP with accuracy if you've had cost changes.



The screenshot shows a dialog box titled "Budget Adjustment". It contains the following elements:

- Adjustment Options**: A section containing two input fields: "Budget Adjustment" and "New Budget Total".
- Adjustment Description**: A text area for providing details about the budget change.
- Buttons**: "Cancel" and "Proceed" buttons at the bottom.

# Budget Adjustment (JR)



Delete Find Find All Print Transfer List View Change Order Unlock Template Sessions Export Refresh Web Help Settings

Looked Ordered Work Order Received Scheduled Delivered Verified Invoiced Comm Set Comm Paid Closed % Comp Job Start Date Install Complete Mission Control

## Job One Point Floors

Project # 8035

Sold To: Star 10 Contractors, Contact: 723, Address: 890 Industrial Way, San Francisco, CA 94102

Ship To: Star 10 Contractors, Location: IUES 2023, Address: 890 Industrial Way, San Francisco, CA 94102

Job Start Date: [Empty], Owner: [Empty], General Contractor: [Empty], Architect: [Empty], Designer: [Empty], Project Manager: [Empty], Accounting Manager: [Empty], Line Of Business: [Empty], Job Description: Carpet Material & Install

Job # 8035, Customer PO IUES 2023, Date 8/15/2023, Plan Date [Empty], Store 1 One Point, Entry Person Bekah, Sales Person 1 Bekah (100%), Sales Person 2 [Empty]

Entry CRM Activities Upgrades Bundle Status Profits Chg Orders Job Mail Pick Ticket Forms Project Sitefotos

Filter Mat / Lab Filter Product Type Filter Procurement Filter Job Progress Filter Job Costs Clear Filtering More Lines

Type	S.Quan	W.Quan	Unit	Length Width	ID#	Product Description Labor Type / Labor Description	Color / Item Number Area	Sell	Total	Actions
Carpet	Materials 500		SY		5964 SHAW	Archeology 5a143	Shoreline	L \$14.67	\$7,335.00	[Icons]
Line# 1	Labor 500		SY	12	5	Carpet Install Carpet over pad with Pattern Match	Master & Guest Bedrooms	\$8.06	\$4,025.00	[Icons]
Carpet	Materials 500		SY		5949 SHAW	Alchemy 50746	46517 Uranium	L \$15.40	\$7,700.00	[Icons]
Line# 2	Labor 500		SY	12	8	Carpet Install Carpet over pad with Pattern Match	Master & Guest Bedrooms	\$7.67	\$3,835.00	[Icons]
Pad	Materials 1000		SY		3896 LEGGETT	Rebond Pad 3/8" 8lb	3/8" 8 Lb Density	A \$2.67	\$2,670.00	[Icons]
Line# 3	Labor				6					[Icons]
Labor	Materials 8000		SF			Floor Prep Standard Floor Prep		\$4.40	\$3,200.00	[Icons]
Line# 4	Labor									[Icons]

Information: Conditions General, Terms Net 30

Actions: Refresh Totals, Details / Signature

Totals: Labor [Empty], Materials [Empty], Sales Tax [Empty], Grand Total [Empty], Payments [Empty], Balance \$28,765.00

Navigator: Opportunity Proposal Installer Workorder Customer Payments PO Product Catalog Calendar Invoices A/R Bills A/P Inventory Job Mail

# Profit & Cost Review Meetings



- Sales personnel/Project Managers & Accountants
  - Review WIP and percentage of completion on projects (in EJC)
    - Verify accuracy of the percentage of project completion (JR)
  - Review current Costs to Date
  - Review Trending Costs based on Costs to Date
  - Analyze causes & culprits for profit increases and losses
  - Discuss appropriate Budget Adjustment (JR)
    - Increase accuracy of the percentage of completion



# Q & A

# Next Up: Breakout #6

1:45 – 2:30 pm

- Mission Control for System Health – Griffin Ballroom
- PS Mobile Module– Belle Meade Room
- Estimation Integration with JobRunner & FloorManager –  
Arlington Room