



Project Management Tool

Pacific Solutions Users Education Seminar

Reset Report

Admin

Continental

Admin

Maintenance

Value Lists

Age Demographics

Alternate Names

Area

Bin Location

Competitors

Form Value Lists

Form Templates

Forms

Invoice Flags

Job Types

Line Of Business

Lost

Market Sector

Marketing

Note Templates

Product Interest

Project Management

Sales Stages

Warehouses

Won



Project Management

JobRunner Only

Actions Edit On

Template Default

User definable field labels

You can have more than one set of job templates.

Header Label
Required Job Completion Date
Bonded Job?
Moisture Testing Complete?
Job Site Supervisor Name
Plans Received?

Field Type	Sort	Req
Date	1	<input checked="" type="checkbox"/>
Value List	2	<input type="checkbox"/>
Value List	3	<input type="checkbox"/>
Free Form	4	<input type="checkbox"/>
Value List	5	<input type="checkbox"/>
Free Form	6	<input type="checkbox"/>
Free Form	7	<input type="checkbox"/>
Free Form	8	<input type="checkbox"/>
Free Form	9	<input type="checkbox"/>
Free Form	10	<input type="checkbox"/>
Free Form	11	<input type="checkbox"/>
Free Form	12	<input type="checkbox"/>
Free Form	13	<input type="checkbox"/>
Free Form	14	<input type="checkbox"/>
Free Form	15	<input type="checkbox"/>

User definable field types. Date, Value List, Free Form

This opens the value list option menu.

Make a field so that the content is required

Up to 75 User Added Fields. User can re-order the fields.

Project Management

Actions

Edit Off

Template In House Jobs

Jim and Nicks BBQ



Header Label

Field Type

Header Label	Field Type		
Required Job Completion Date	Date	1	<input type="checkbox"/>
Bonded Job?	Value List	2	<input type="checkbox"/>
Moisture Testing Complete?	Value List	3	<input type="checkbox"/>
Job Site Supervisor Name	Free Form	4	<input type="checkbox"/>
Plans Received?	Value List	5	<input type="checkbox"/>
	Free Form	6	<input type="checkbox"/>
	Free Form	7	<input type="checkbox"/>
	Free Form	8	<input type="checkbox"/>
	Free Form	9	<input type="checkbox"/>

Project Management

Actions

Edit Off

Template Jim and Nicks BBQ



Header Label	Field Type	Sort	Req
Regional Manager	Free Form	1	<input checked="" type="checkbox"/>
Installation Completed on:	Date	2	<input type="checkbox"/>
Jim and Nicks floor Package	Value List	3	<input type="checkbox"/>
Moisture test type	Value List	4	<input type="checkbox"/>
Regional Installation Company	Free Form	5	<input type="checkbox"/>
Bonding required?	Value List	6	<input type="checkbox"/>
	Free Form	7	<input type="checkbox"/>
	Free Form	8	<input type="checkbox"/>

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

Sold To **Contact / Phone**

JIM BILLINGS INTERIORS

7846 LOOKOUT DRIVE

LA JOLLA CA 92037

Fax 858 5678901

Ship To **Community / Plan**

Gene Butler Interiors

7846 LOOKOUT DRIVE

City, State, Zip

Phone

Project # 2

Job # 2753

Date 9/22/2023

Store 1 Continental

Sales Person Davey Jones

Sales Person

Entry CRM Activites Upgrades Bundle Status Profits Ch... Job Cost Master Forms Sitefotos Project Management

Classification Jim and Nicks BBQ

(R) Regional Manager

Installation Completed on:

Jim and Nicks floor Package

Moisture test type

When all of the fields that are designated as "required" contain data, the required status light will illuminate.



Sold To		Contact / Phone		
JIM BILLINGS INTERIORS				Name
7846 LOOKOUT DRIVE				Address
LA JOLLA	CA	92037		Lot / Suite #
	Fax	858 5678901		City, State, Zip
				Phone

Entry	CRM Activites	Upgrades	Bundle	Chg O
Classification	Jim and Nicks BBQ			
	(R) Regional Manager	Nancy Jones		
Installation Completed on:				
	Jim and Nicks floor Package	Gray LVP with Tile Kitchen		
Moisture test type		Brown LVP Distressed		
		Dark Oak LVP		
Regional Installation Company				

Value list field

- Jim and Nicks floor Package
- Gray LVP with Tile Kitchen
- Brown LVP Distressed
- Dark Oak LVP

Return Show All Export Filters Refresh Statuses **Project Management**

Mission Control

Project #	Job #	Date	Job Name	Job Description	Sales Per
9104	2128	7/17/2017	Turner		nes
2129	2129	7/17/2017	Omni Carlsbad		nes
2132	2132	7/19/2017	Turner		nes
2133	2133	7/20/2017	Mannington Commercial		Davey Jones
2133	2133-1	7/20/2017	Mannington Commercial		Davey Jones
2135	2135	7/21/2017	Turner		Davey Jones
2136	2136	7/24/2017	Capitol Investments		Davey Jones
2137	2137	8/1/2017	Lumina		Davey Jones
2139	2139	8/1/2017	Lumina		Davey Jones
2140	2140	8/1/2017	Lumina		Davey Jones
2141	2141	8/2/2017	Capitol Partners		Davey Jones
2142	2142	8/8/2017	Turner		Davey Jones
2142	2142-1	8/8/2017	Turner		Davey Jones

New button in Mission Control.

Return

Project Management

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In House Jobs
Jim and Nicks BBQ

Project #	Job #	Date	Job Name	Job Description	Sales Person
9104	2128	7/17/2017			Davey Jones
2129	2129	7/17/2017			Davey Jones
2132	2132	7/19/2017			Davey Jones
2133	2133	7/20/2017			Davey Jones
2133	2133-1	7/20/2017			Davey Jones
2135	2135	7/21/2017			Davey Jones
2136	2136	7/24/2017			Davey Jones
2137	2137	8/1/2017	Lumina		Davey Jones
2139	2139	8/1/2017	Lumina		Davey Jones
2140	2140	8/1/2017	Lumina		Davey Jones

Drop down of template options. Will filter Mission Control to only display jobs with this classification

Return

Project Management

Page 1

Jim and Nicks BBQ

Export

Project #	Job #	Date	Job Name	Job Description	Sales Person	Start Date	(R) Regional Manager	Installation Completed on:	Jim and Nicks floor Package
2753	2753	9/22/2023	GENE BUTLER INTER		Davey Jones		Nancy Jones		Gray LVP with Tile Kitchen Brown LVP Distressed Dark Oak LVP

Mission Control with the custom columns can be exported to Excel.

The Project Tab custom fields appear here, are fully functional and scroll out to 75 columns.