



# Signature

## Job Cost Portal

### Guide

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# Introduction

Signature Job Cost Portal is a web-based application that is used with Signature Job Cost and Signature TimeTrack. Job Cost Portal lets remote technicians access information from Job Cost by using a web browser. This information includes the details of your jobs. By using Job Cost Portal, you can view job and project details, including information that pertains to cost codes, bill codes, transactions, and change orders.

You can also use Job Cost Portal to complete these tasks:

- Update scheduled dates, cost codes, and the percentage that's complete for a job
- Create change orders and change order cost codes
- Create forecast revisions

 Job Cost Portal supports the Division method of assigning an account to a cost code. Multicurrency and bill codes on a change order aren't supported.

If you purchased Signature Project Management Portal, you also received Job Cost Portal. These are some notes that pertain to how these applications integrate:

- In Project Management Portal, you access Job Cost Portal pages by using the **Financials** link on the Quick Launch bar. This opens the Job Detail page in Job Cost Portal.
- When you create a change order or forecast revision in Job Cost Portal from within Project Management Portal, you're prompted to sign in to Job Cost Portal using your credentials. Your user name must be set up in the Signature Portal Security application.

# Installing Job Cost Portal

This section provides information to help you install Job Cost Portal.

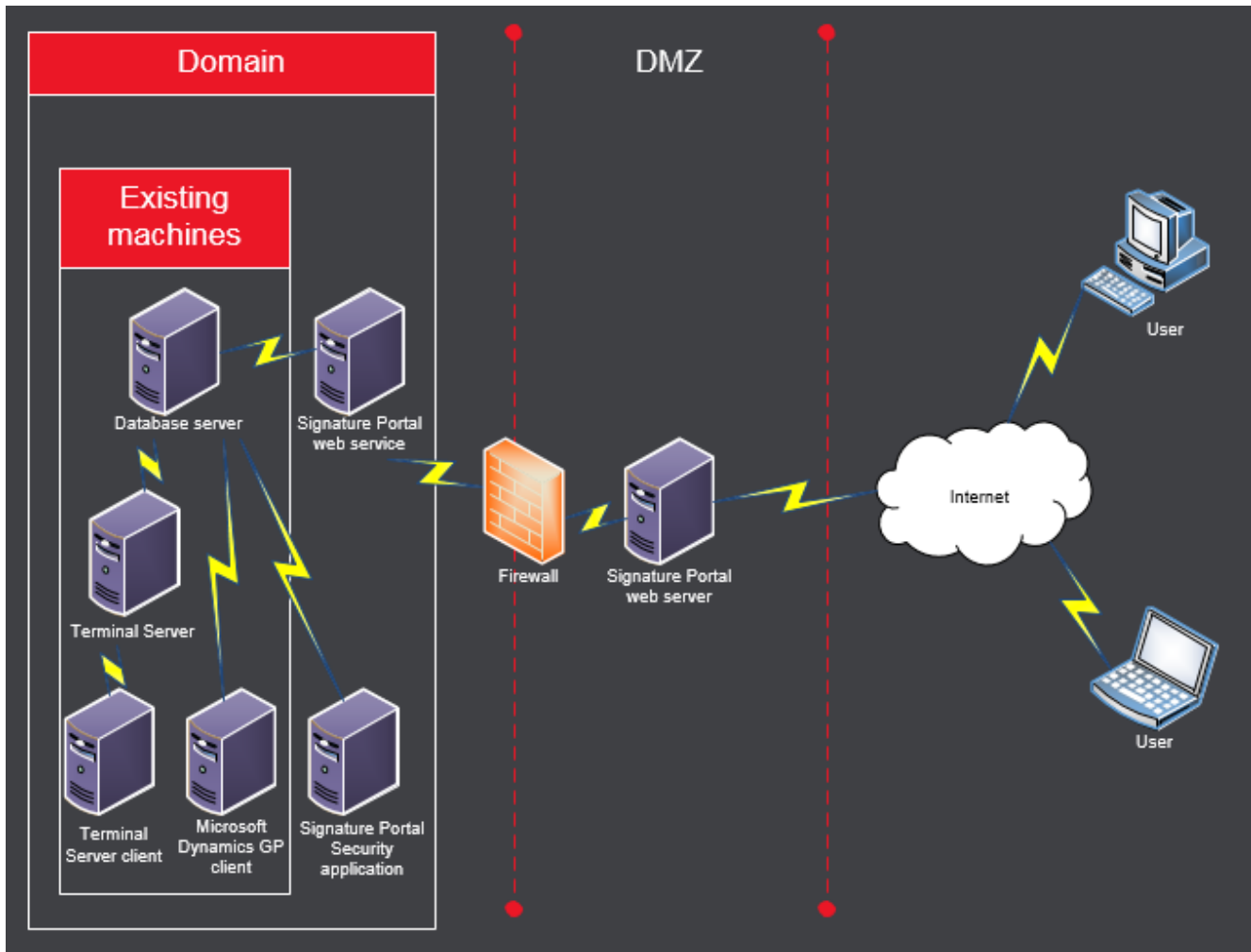
## System Requirements

To find a complete list of system requirements across all the Signature modules, please refer to the Signature System Requirements document found on the Product Download page on Signature Resources at <https://www.wensoft.com/wsportal/product-downloads>.

## Computer Network Setup

We recommend that you install the Signature Portal Security application and Signature Portal web service on a machine that resides within the boundaries of your organization's firewall, preferably on your organization's domain.

This diagram illustrates a recommended setup.



We recommend that you run all installations in administrator mode, and that you install the Job Cost Portal applications in the documented order.

- [Before you install Job Cost Portal \(page 3\)](#)
- [Install the Signature Portal Web Service \(page 3\)](#)
- [Install the Job Cost Portal website application \(page 3\)](#)
- [Install the Signature Portal Security application \(page 4\)](#)
- [Verify the application pool settings \(page 4\)](#)

## Before you install Job Cost Portal

Before you install Job Cost Portal, you must save your Job Cost setup options.

1. In Microsoft Dynamics GP, choose *Microsoft Dynamics GP > Tools > Setup > Job Cost > Job Cost Setup > Setup Options*. The Job Cost Setup Options window is displayed.
2. Choose *Save* and close the window.

## Install the Signature Portal Web Service


As illustrated in [Computer Network Setup \(page 2\)](#), the way your system is set up plays a large role in the level of security that is provided when you use Signature portals. Signature portals use the built-in security features of Integrated Windows Authentication.

The Signature Portal web service requires the PortalUser user account to enable access to the SQL server. This user must have system administration rights in order to set up portal security and perform other tasks.

1. Double-click **PortalWebService-<version>.exe**.
2. On the Welcome to the Signature Portal Web Service Setup Wizard page, choose *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Choose *Next*.
5. On the Data Source Configuration page, enter the server name, the company database, and the password for the sa user.
6. Choose *Next*.
7. On the Web Service Configuration page, enter a password for the PortalUser user.
8. Choose *Next*.
9. On the Select Installation Folder page, accept the default installation location, or choose *Browse* to select the folder where the Signature Portal web service will be installed.
10. Choose *Next*.
11. On the Ready to Install page, choose *Install*.
12. When the installation is finished, choose *Finish*.

## Install the Job Cost Portal website application

1. Double-click **PortalWebSiteJobCost-<version>.exe**.

 If the system detects any prerequisite software that must be installed, a window displays a list of those prerequisites. You must complete those installations before you proceed.

2. On the Welcome to the Signature Portal Web Site - Job Cost Setup Wizard page, choose *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Choose *Next*.
5. On the Web Service Configuration page, enter the address of the Signature Portal web service.
6. Choose *Next*.
7. On the Select Installation Folder page, accept the default installation location, or choose *Browse* to select the folder where the Job Cost Portal website application will be installed.
8. Choose *Next*.
9. On the Ready to Install page, choose *Install*.
10. When the installation is finished, choose *Finish*.

## Install the Signature Portal Security application

1. Double-click **PortalSecuritySetup-<version>.exe**.
2. On the Welcome to the Signature Portal Security Setup Wizard page, choose *Next*.
3. On the End-User License Agreement page, review and accept the terms of the license agreement.
4. Choose *Next*.
5. On the Data Source Configuration page, enter the server name and the company database.
6. Mark *Create Objects* and enter the password for the sa user.
7. Choose *Next*.
8. On the Select Installation Folder page, accept the default installation location, or choose *Browse* to select the folder where the Signature Portal Security application will be installed.
9. Choose *Next*.
10. On the Ready to Install page, choose *Install*.
11. When the installation is finished, choose *Finish*.

## Verify the application pool settings

Depending on the version of .NET Framework that you use, you might encounter configuration errors when you try to open Job Cost Portal. To avoid this error, you need to verify that the application pool uses ASP.NET v4.0.

1. Choose *Start > Administrative Tools > Internet Information Services (IIS) Manager*.
2. On the Internet Information Services (IIS) Manager console, in the left pane, expand your server name, and then expand the *Sites* node.
3. Find and right-click the *JobCostPortal* site. Choose *Manage Application > Advanced Settings*.
4. On the Advanced Settings window, choose the *Application Pool* lookup icon.
5. On the Select Application Pool window, in the Application pool field, select *ASP.NET v4.0*.
6. Choose *OK*.
7. On the Advanced Settings window, choose *OK*.

## Setting up Security for Portal Users

The Signature Portal Security application lets you define security access for the information that's displayed on portal pages. Setting up this security is a multistep process that involves both Signature Portal Security and various setup windows in the other Signature modules.

- [Signature Portal Security overview \(page 4\)](#)
- [Before You Set up Security \(page 5\)](#)
- [Open Signature Portal Security \(page 6\)](#)
- [Navigate Signature Portal Security \(page 6\)](#)
- [Set up Users and Permissions \(page 8\)](#)

## Signature Portal Security overview

This section contains general information and tips about Signature Portal Security.

- The objects (and meta) need to be created only once per company, but they can be run additional times without destroying any data.
- Installation of SQL objects is transactional; if the install fails, all objects are removed.

- ODBC isn't used. When you're prompted for server names, enter the actual server name, not an ODBC name.
- Signature Portal Security uses Integrated Windows Authentication. You can change this in the **PortalSecurity.exe.config** file.
- Signature Portal Security can support multiple companies. You can select different companies or add companies as needed.
- Signature Portal Security contains all the SQL objects. You can add new companies without installation media.
- When you set up security for the portals, grant permissions before you load a visual template.
- Visual templates rely on data permissions and won't load correctly if the data permissions aren't set.
- Job Cost creates and maintains SQL logins. The users are associated with employees. A single user can be associated with an employee in more than one company.
- The assignment of the SQL user needs to be set to none for all companies before a user can be deleted.
- Signature Portal Security application errors are sent to the Windows Event Log (WennSoft).

## Before You Set up Security


Before you set up security for portal pages, consider the number of groups that you'll need and the data that you'll want the members of each group to have access to. For example, supervising contacts or users might need to be able to view more pages and information than other contacts or users. You can even name your groups to reflect roles. As you determine your groups, we recommend that you open the Job Cost Portal website application to see which data and display options are available.

In addition, as you set up security and access parameters, you can preview the resulting pages in Signature Portal Security.

- [Data Settings \(page 5\)](#)
- [Visual Display Settings \(page 5\)](#)
- [Permission Types \(page 5\)](#)

## Data Settings

Areas in Job Cost are represented by data objects. For example, there is a Job object for job details and a list of jobs, and a JobCostCode object for cost code details and a list of cost codes. In Signature Portal Security, you assign access to these data objects by security group, contact, or both.

 Some data objects that are displayed in Signature Portal Security aren't currently supported.

## Visual Display Settings

Portal pages and panes represent what is displayed on the portal website pages. In Signature Portal Security, you assign access to these pages and their panes by security group. Each combination of web page and pane contains a list of properties that you can set permissions for.

## Permission Types

For each data object, you can set one of these permissions:

- **Create** (create new object)
- **Read** (view object)
- **Update** (change object values)

Some permissions affect others. For example, if the **Read** permission isn't set, the **Update** permission can't be set.

For each web page or pane property, you can set permissions to display (or not display), and you can indicate whether that property value is required.

**⚠** Although it's displayed in Signature Portal Security, the **Delete** permission type isn't supported with this version of Signature portals. Users can't delete records from the website.

## Open Signature Portal Security

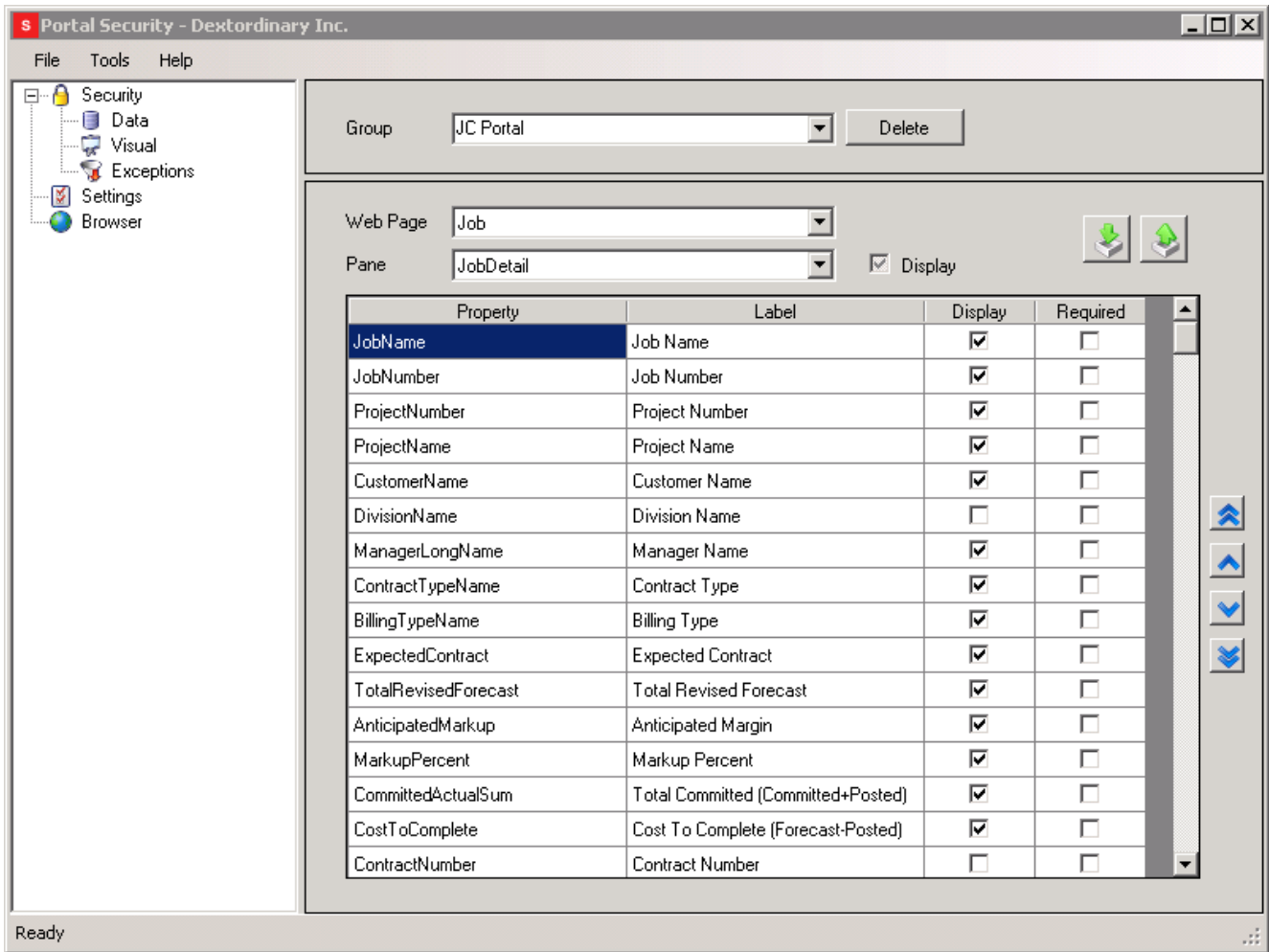
1. Choose *Start > All Programs > Signature > Portal Security > Signature PortalSecurity*.
2. On the Portal Security window, select the product. Only the products that you've purchased or registered appear in the list.

## Navigate Signature Portal Security

Signature Portal Security uses a tree view design, which lets you select items in the left navigation pane and view them in the right display pane. When you select an item in the tree view, the right pane displays the selected content. For example, it might display the content for **Data > objects** or **Visual > web pages/panes**.

The fields in the display pane are empty until you create a security group and set up permissions for the properties of an object.

The following illustration contains a group that has already been created and its associated properties for a sample data object.



These items are available in the tree view (the left navigation pane).

| Item                            | Used to   |
|---------------------------------|---|
| <b>Security &gt; Data</b>       | Set permissions for access to data objects for each security group.                                   |
| <b>Security &gt; Visual</b>     | Determine which properties display on the portal pages for each security group.                       |
| <b>Security &gt; Exceptions</b> | For specific users, set exceptions to the permissions that are assigned to the security group.        |
| <b>Settings</b>                 | Capture sign-in attempts that were successful or unsuccessful.  |
| <b>Browser</b>                  | View portal pages directly from within Signature Portal Security. The pages open in the display area. |

## Set up Users and Permissions

You must create security groups and assign permissions to those groups to access Signature Portal pages.

You must complete the procedures in this order:

- [Create Security Groups \(page 8\)](#)
- [Set up a New User \(page 8\)](#)
- [Assign Permissions to Data Objects \(page 8\)](#)

### Create Security Groups


You can set up as many security groups as you want. Before you start, you might want to make a note of which data objects will belong to which groups, and how you want to assign permissions to those groups.

1. In Signature Portal Security, in the tree view, choose **Security > Data**.
2. Enter a name for the group and press TAB.
3. When you're prompted to create the group, choose **Yes**.
4. Repeat steps 2 and 3 to add more groups, as necessary.

### Set up a New User

You must set up users for Job Cost Portal pages. The users that you set up here are automatically added as SQL users, and you'll assign each user to a security group.

1. In Signature Portal Security, in the **User Name** column, select a row and enter the user's first name.

 Make sure that you enter the name correctly before you leave the field. As soon as you leave the field, a SQL user is created and you can't change the user name by using this application.

2. In the **Password** column, enter a password.
3. In the **Server** field, enter the full name of the SQL server.
4. In the **Employee** field, select the employee who is associated with this user.
5. In the **Group** field, choose the ellipsis (...) button, and then select the group that this user belongs to.

### Assign Permissions to Data Objects

For each portal data object, you can determine whether the members of a security group can view, create, and update information that is associated with that object.

You can assign permissions for the group as a whole (for example, all members of a group can view all properties for a data object), or you can assign permissions for individual properties of that object.

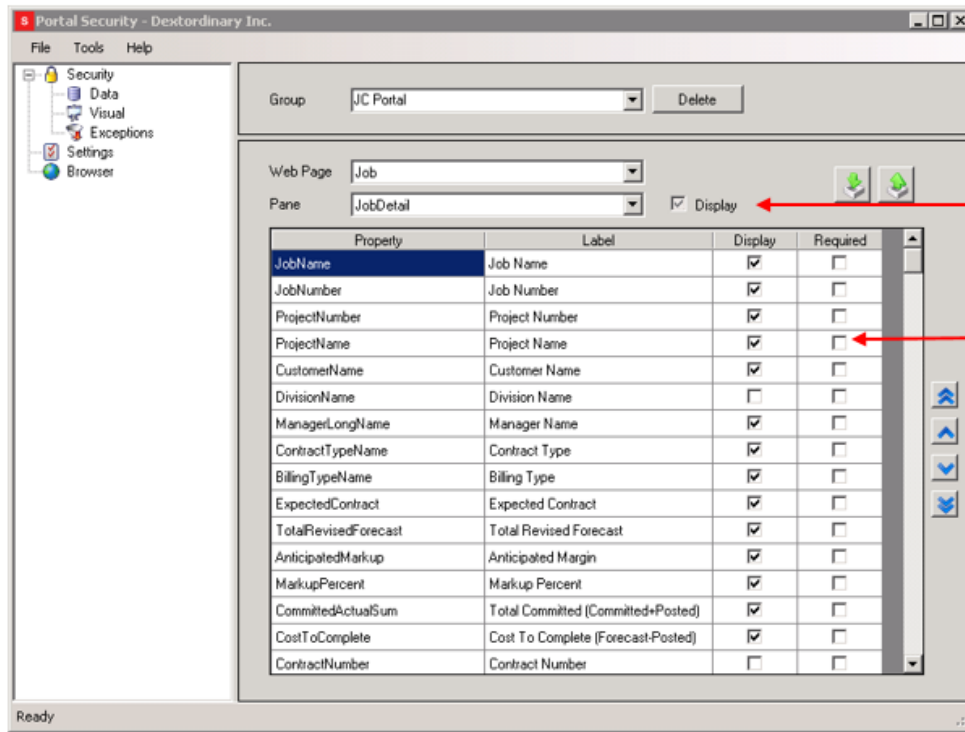
1. In Signature Portal Security, in the tree view, choose *Security > Data*.
2. Select the group to assign permissions for.
3. Choose a data object. The properties that are associated with the object are displayed in the right pane.
4. For each object property, mark the appropriate checkboxes to set permissions.

You can also use the checkboxes next to the data object field to assign a permission level to all properties for the selected object.

These rules apply:



- To mark a property or object with **Update** permissions, that property or object must also have **Read** permissions.
- The **Create** permission applies only at the object level, not to individual properties for an object.



Use this area to set permissions for all properties

Use this area to set permissions for individual properties

## Setting up Display Preferences

After you set up users and permissions, you need to determine what to display on the pages for a selected contact group. You can start from scratch and select the data that you want to display, or you can load a predefined visual template as a starting point. You can change a template and save those changes as a new template. You can also copy an existing template, change it, and rename it.

The **DefaultJobCostTemplate.xml** predefined visual template contains basic information about each job, cost code, change order, etc., and also details that pertain to costs, labor, and estimates.

For example, the Job Detail page displays this information:

- Total revision forecast
- Contract number
- Last billing date
- Estimated labor units
- Actual labor units
- Actual completion date
- Scheduled start date
- Scheduled completion date

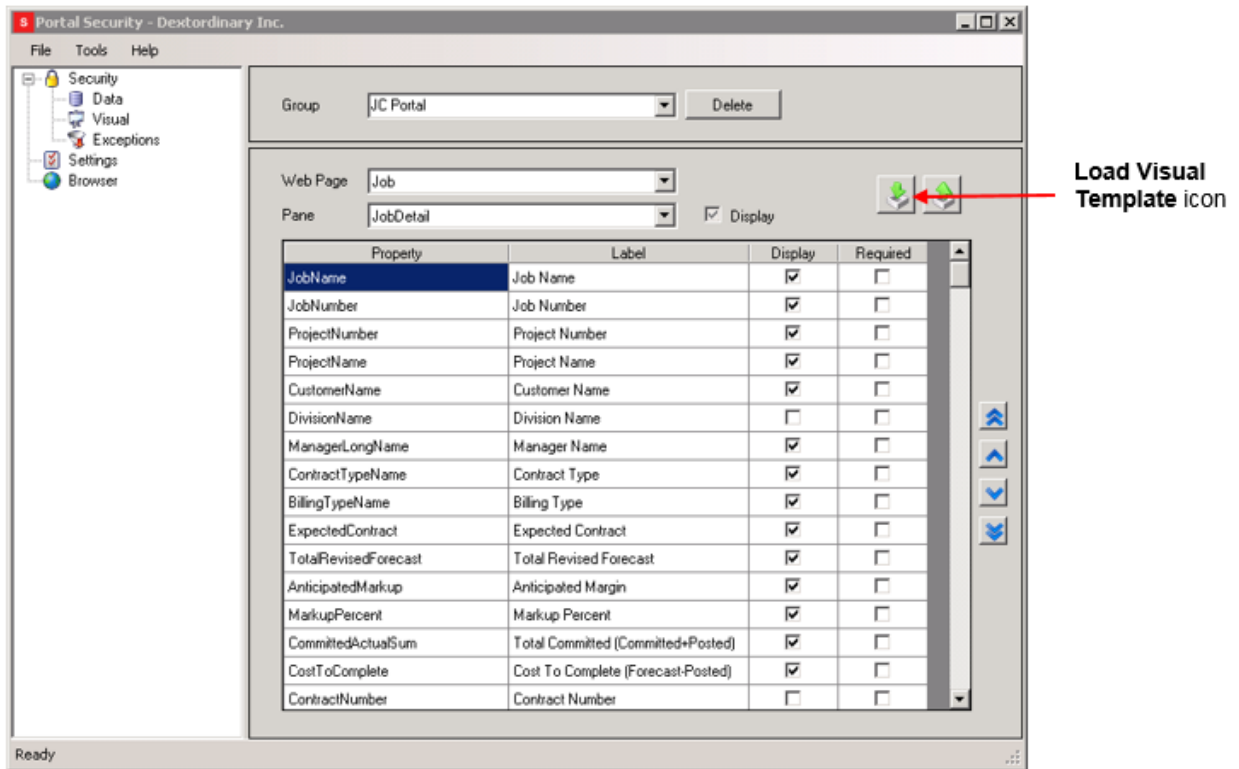
**!** If you already set up information to display, loading a template overrides those initial settings.

- [Load a Predefined Visual Template \(page 10\)](#)
- [Manually Choose Visual Settings \(page 10\)](#)
- [Save Changes to a Template \(page 11\)](#)

## Load a Predefined Visual Template

Keep in mind that if you have already set up information to display, loading a template overrides those initial settings.

1. In Signature Portal Security, in the tree view, choose *Security > Visual*.
2. Select a group.
3. Choose the **Load Visual Template** icon.



A message is displayed, saying that if you load a template, you'll lose any visual settings that were already chosen for this group. Choose Yes to proceed.

4. On the Select Visual Template window, open the **Templates** folder.
5. Choose a template, or make a copy of a template and rename it so you can change it.
6. Choose *Open*. It might take a few minutes for the template to load.
7. When processing is complete, you'll receive a message that the template was loaded successfully.
8. Choose *OK*.

## Manually Choose Visual Settings

If you aren't using a visual template, or if you already loaded a template and you want to make more changes to the visual settings, use these instructions to set up the pages and panes that are displayed for a group.

When you choose visual settings, some web pages and panes are dependent on others. For example, to display job details (the Job page), you must also display the list of jobs (the JobList page).

1. In Signature Portal Security, in the tree view, choose *Security > Visual*.
2. Select a web page and a pane. Each web page contains at least one corresponding pane.
3. The properties that are associated with the selected web page and pane are displayed. For each property, set these display options:
  - To display a data property for members of the selected group, mark **Display**. To display all properties for this web page and pane, mark **Display** next to the **Pane** field.
  - To require that a user manipulate data in some way, mark **Required** for the property. It's useful to set a property as required if the corresponding field in Job Cost is also required. Optional fields or properties shouldn't be marked as required.

If a property is required, the group must also have **Update** permissions for the corresponding data object property (*Security > Data*).

4. To view the changes immediately, choose *Browser* in the tree view to open the portal site.

## Save Changes to a Template

If you customize a basic template or want to save your visual settings, follow these steps to create a template.

1. In Signature Portal Security, in the tree view, choose *Security > Visual*.
2. Select a group to display the visual settings for that group.
3. Choose the **Save Visual Template** icon.

The screenshot shows the 'Portal Security - Dextordinary Inc.' application window. The left sidebar contains a tree view with 'Security' expanded to 'Visual'. The main area shows settings for 'Group: JIC Portal', 'Web Page: Job', and 'Pane: JobDetail'. A table lists properties with 'Display' and 'Required' checkboxes. Two green icons (one with a checkmark, one with a plus sign) are visible, with a red arrow pointing to the plus icon labeled 'Save Visual Template icon'.

| Property             | Label                              | Display                             | Required                 |
|----------------------|------------------------------------|-------------------------------------|--------------------------|
| JobName              | Job Name                           | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| JobNumber            | Job Number                         | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ProjectNumber        | Project Number                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ProjectName          | Project Name                       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CustomerName         | Customer Name                      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| DivisionName         | Division Name                      | <input type="checkbox"/>            | <input type="checkbox"/> |
| ManagerLongName      | Manager Name                       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ContractTypeName     | Contract Type                      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| BillingTypeName      | Billing Type                       | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ExpectedContract     | Expected Contract                  | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| TotalRevisedForecast | Total Revised Forecast             | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| AnticipatedMarkup    | Anticipated Margin                 | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| MarkupPercent        | Markup Percent                     | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CommittedActualSum   | Total Committed (Committed+Posted) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| CostToComplete       | Cost To Complete (Forecast-Posted) | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| ContractNumber       | Contract Number                    | <input type="checkbox"/>            | <input type="checkbox"/> |

4. Browse to the folder where the template will be saved. We recommend that you save the template to the *Templates* subfolder.
5. Enter a name for the template.
6. Choose *Save*.

## Setting up Optional Preferences

Additional setup procedures enhance the security and use of Signature Portal pages.

- [Create an Exception List \(page 12\)](#)
- [Create a Link to the Signature Portal Site \(page 12\)](#)
- [Change the Microsoft Dynamics GP Company \(page 12\)](#)
- [Add a Microsoft Dynamics GP Company \(page 13\)](#)
- [Keep a Log of Sign-in Attempts \(page 13\)](#)

### Create an Exception List

You can choose to exclude certain contacts from viewing, creating, and updating specific data objects. For example, you might want contact A to access job information, but not customer information. You can create an exception to override the group permissions that are set up for that contact. This exception list applies to all security groups that are created by using Signature Portal Security.

1. In Signature Portal Security, in the tree view, choose *Security > Exceptions*.
2. Select the contact, customer, and location to create an exception for.
3. Select a data object that this exception applies to.
4. Mark or unmark the appropriate checkboxes to keep or remove a particular permission level for the selected data object for this contact. Leave all checkboxes unmarked if you don't want the contact to have any access to the data object.
5. Create additional exceptions, as needed.

### Create a Link to the Signature Portal Site

You can view the results of your security and visual settings immediately by creating a link to the Signature Portal site from within Signature Portal Security.

1. In Signature Portal Security, choose *Tools > Portal URL*. The Portal URL window is displayed.
2. Enter the URL of the portal site and choose *OK*.
3. To test the link, in the tree structure, choose *Browser* and sign in. The site opens in Signature Portal Security.

### Change the Microsoft Dynamics GP Company

If you have multiple companies, you might want to create groups and web pages for each company. You first must select the company so the system knows which company the settings apply to. This company was selected during installation.

1. In Signature Portal Security, choose *Tools > Change Company*.
2. On the Change Company window, select the company.
3. Choose *OK*.

## Add a Microsoft Dynamics GP Company

If a Microsoft Dynamics GP company was added after Signature Portal Security was installed, you can add that company to Signature Portal Security. This provides the data that is needed to work with a new instance of the portal.

1. In Signature Portal Security, choose *Tools > Add Company*.
2. On the Add Company window, enter the name of the company exactly as it appears in Microsoft Dynamics GP.
3. Choose *OK*. Only companies that weren't already set up appear as available companies to add.

## Keep a Log of Sign-in Attempts

You can set up the system to track sign-in attempts to Signature Portal websites. These sign-in attempts create a file in the event log, which you can view by using Event Viewer in Windows Control Panel.

1. In Signature Portal Security, in the tree view, choose *Settings*.
2. Mark **Audit Login Attempts**.


## Using Job Cost Portal Pages

After signing in to the Job Cost Portal, you can access the main pages directly from the home page. The tabs and **Logout** icon are available from any page after you navigate away from the home page. You can sort the list data on all main pages – except the home page – by column in ascending or descending order. To sort the data, choose a column heading.

- [Optimize the Page Column Display \(page 13\)](#)
- [Use the Home Page \(page 13\)](#)
- [Use the Project Pages \(page 14\)](#)
- [Use the Job Pages \(page 15\)](#)
- [Use the Cost Code Pages \(page 16\)](#)
- [Use the Change Order Pages \(page 16\)](#)
- [Use the Forecast Revision Pages \(page 17\)](#)
- [Use the Invoice List and Note List Pages \(page 17\)](#)
- [Use the Attachment List Page \(page 18\)](#)

## Optimize the Page Column Display

To view portal columns at their optimal width, we recommend that you set your browser resolution to 1024 x 768.

 The sample illustrations that are included in this document are based on the default page template.

## Use the Home Page

The home page displays this user-specific information:

- Your employee profile (this area is read-only and depends on the user information that is set up for you)
- The number of jobs by contract type (fixed, cost plus, and cost plus NTE)
- The total expected contract amount for each contract type

## Use the Project Pages

The Projects page lists your projects. The columns that are displayed in the grid depend on what is set up in Signature Portal Security. Use the scroll bar to view additional columns.

- [View Project Details \(page 14\)](#)
- [View the Project Position Page \(page 14\)](#)
- [View the Project Job List Page \(page 14\)](#)
- [View the Attachment List Page \(page 14\)](#)

## View Project Details

- To view the details for a project, select the lookup icon for a project number.
- To view additional details, choose an item from the **Project Detail** menu. You can view the following detail pages.

## View the Project Position Page

| Home   | Projects                            | Jobs  |
|--|-------------------------------------|---|
| Project List    Project Detail    Project Position |                                     |   |
| Project Number                                     | <input type="text" value="041516"/> | <input type="text" value="041516 Project"/> |
| Contract Earned                                    | <input type="text" value="0.00"/>   |   |
| Contract Billed                                    | Contract Earned                     | Over(Under) Billed                          |
| <input type="text" value="0.00"/>                  | <input type="text" value="0.00"/>   | = <input type="text" value="0.00"/>         |
| Total Cash Received                                | Total Posted Cost                   | Cash(Over) Shortage                         |
| <input type="text" value="0.00"/>                  | <input type="text" value="0.00"/>   | = <input type="text" value="0.00"/>         |

## View the Project Job List Page

Use the lookup icon for a job number to access job information from this page.

## View the Attachment List Page

Use this page to view a list of project attachments.

You can't use these characters in the description field:

- Double dash (--)
- Asterisk followed by a slash (\* /)
- Slash followed by an asterisk (/\*)
- Semi-colon (;)

## Use the Job Pages

The Jobs page lists all active jobs for the selected contract type. The columns that are displayed depend on what is set up in Signature Portal Security. To sort by a particular column in ascending or descending order, choose the column heading to sort by.

## Filter the Displayed Jobs

By default, Job Cost Portal displays every active job in the job list. You can filter by contract type, and you can also specify additional filters to make the display more specific.

To filter the display by selecting fields, you must build an expression that includes and/or scenarios, and select data value criteria.

| Expression Component | Description   |
|----------------------|---|
| <b>AND/OR</b>        | Used to include multiple fields ( <b>AND</b> ) or one of two fields ( <b>OR</b> ).<br>For example, you might want to include a specific billing type <b>AND</b> job type, or a specific billing type <b>OR</b> job type.  |
| <b>Operator</b>      | Used to further specify field display criteria.<br>Operators include <b>Equal To</b> , <b>Not Equal To</b> , <b>Contain</b> , and <b>Not Contain</b> .<br>For example, to display just one job, in the <b>Job Number</b> field, select the <b>Equal To</b> operator, and then enter the job number in the <b>Value</b> field.<br>For numerical fields, operators include <b>Greater Than</b> , <b>Less Than</b> , <b>Greater Than (or) Equal To</b> , and <b>Less Than (or) Equal To</b> .<br>For example, to display all jobs that contain a <b>Cost Complete</b> value of \$500 or greater, select the <b>Cost Complete</b> field, select the <b>Greater Than (or) Equal To</b> operator, and then enter <i>500.00</i> in the <b>Value</b> field. |
| <b>Value</b>         | Used to specify the value of the selected field, such as a job number, customer name, or dollar amount.   |

In the following illustration, only fixed contract and standard billing jobs are displayed for a specific customer who has jobs with a cost complete amount that is greater than \$200.

Job List

Filters (Column Options)

| And/Or | Field           | Operator | Value    |
|--------|-----------------|----------|----------|
|        | Contract Type   | Equal To | All      |
| AND    | Customer Number | Equal To | IWOWI    |
| AND    | Billing Type    | Equal To | Standard |
| AND    | Job Name        | Contains | Test Job |

Filter Clear

| Job Number | Job Name    | Customer Number | Customer Name       | Contract Type | Billing Type | Division Name | Project Manager | Committed Actual Sum | Cost To Complete |
|------------|-------------|-----------------|---------------------|---------------|--------------|---------------|-----------------|----------------------|------------------|
| 041616     | Test Job #2 | IWOWI           | Oh! What a feeling! | Cost Plus     | Standard     | ALL           | Agassi,Andre    | 0.00                 | 0.00             |
| 041716     | Test Job #3 | IWOWI           | Oh! What a feeling! | Cost Plus NTE | Standard     | ALL           | Agassi,Andre    | 0.00                 | 0.00             |

## View Job Details and Complete Other Tasks

Choose the lookup icon for a job number to open the Job Details page.

You can complete these tasks:

| Task  | Description  |
|---|--|
| Update the scheduled date for jobs                        | Change the scheduled start date and choose <b>Update</b> .   |
| Update the estimated percentage that's complete for a job | Change the value in the <b>Estimated Percent Complete</b> field and choose <b>Update</b> .                       |
| View a list of cost codes for a cost element              | At the bottom of the page, choose the lookup icon for a cost element to display the cost codes for that element. |

To view additional job information, use the following options in the **Job Detail** menu.

## View Job Positions

Use the Job Position page to view information about job positions.

## Use the Cost Code Pages

Use the Cost Code List page to view cost code information. To filter the page by cost code element, select an element from the **Element** menu.

You can complete these tasks to view more information about cost codes.

| Task                                     | Description  |
|--|--|
| View additional cost code information    | Choose the lookup icon for a cost code to view cost code information.                                    |
| Update the scheduled date for cost codes | Choose the lookup icon for a cost code, change the scheduled start date, and then choose <i>Update</i> . |

## Use the Change Order Pages

The Change Order List page displays a list of change orders.

- [View Change Order Details and Update the Change Order Status \(page 17\)](#)
- [Create a Change Order \(page 17\)](#)
- [Add a Cost Code to a Change Order \(page 17\)](#)



## View Change Order Details and Update the Change Order Status

To view the change order details, choose the lookup icon for a change order. You then can update the status and other information and choose *Update* to save the changes.

## Create a Change Order

1. On the Change Order List or Change Order Detail page, choose *Create*.
2. On the New Job Change Order page, complete the fields as needed.
3. Choose *Create*.

## Add a Cost Code to a Change Order

1. On the Change Order List page, choose the lookup icon for a change order number.
2. Choose *Change Order Detail > Change Order Cost Code List*.
3. On the Change Order Cost Code List page, choose *Create*.
4. On the New Job Change Order Cost Code page, complete the fields as needed.
5. Choose *Create*.

## Use the Forecast Revision Pages

The Forecast Revision List page displays a list of forecast revisions.

- [View Forecast Revision Details \(page 17\)](#)
- [Create a Forecast Revision \(page 17\)](#)

## View Forecast Revision Details

Choose the lookup icon for a forecast revision to view the details of the forecast revision.

## Create a Forecast Revision

1. On the Forecast Revision List page, choose *Create*.
2. On the New Job Forecast Revision page, complete the fields as needed. A list of available cost codes is available in the **Cost Code** field.
3. Choose *Create*.

## Use the Invoice List and Note List Pages

This page displays a list of invoices.


To view the notes that are associated with an invoice, choose *Invoice List > Note List* to display the Note List page.

## Use the Attachment List Page

This page displays a list of attachments.

To add an attachment, follow these steps:

1. Choose *File* to locate and select an attachment. By default, file sizes can't exceed 4 megabytes (MB). Your system administrator can change this setting.
2. Optional: Enter a description for the attachment.

 The following characters cannot be used the description field:

- Double dash (--)
- Asterisk followed by a slash (\* /)
- Slash followed by an asterisk (/\*)
- Semi-colon (;)

3. Choose *Add*. The attachment appears in the list of attachments for the selected job.

## Contact Information

### Support

Phone: 262-317-3800

Email: [support@wennsoft.com](mailto:support@wennsoft.com)<sup>1</sup>

Hours: Normal support hours are 7:00 a.m. to 6:00 p.m. Central Time. After-hours and weekend support is available for an additional charge. Please contact WennSoft Support for additional information.

WennSoft will be closed in observance of the following holidays: New Year's Day, Memorial Day, Juneteenth, Independence Day, Labor Day, Veteran's Day, Thanksgiving Day, the day after Thanksgiving, Christmas Day, and the day after Christmas.

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### Support Plans

We're committed to providing the service you need to solve your problems and help your team maximize productivity.

We offer several Signature Enhancement and Support Plans to meet your needs and Extended Support Plans for retired product versions available at <https://www.wennsoft.com/wportal><sup>2</sup>.

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### Sales

Phone: 262-317-3700

Fax: 262-317-3701

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### WennSoft Headquarters

Address:

WennSoft

1970 S. Calhoun Rd.

New Berlin, WI 53151-1187

Phone: 262-821-4100 or 866-539-2228

Email: [info@wennsoft.com](mailto:info@wennsoft.com)<sup>3</sup>

Website: [www.wennsoft.com](http://www.wennsoft.com)<sup>4</sup>

Office hours: Monday through Friday from 8 a.m. to 5 p.m. Central Time.

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<sup>1</sup> <mailto:support@wennsoft.com>

<sup>2</sup> <https://www.wennsoft.com/wportal/>

<sup>3</sup> <mailto:info@wennsoft.com>

<sup>4</sup> <http://www.wennsoft.com>

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