

# Setting Up Jobs, Phases, and Cost Codes

Available in All Versions of Sage 50 Accounting

## Quick Reference Guide

### What are jobs, phases, and cost codes?

- **Jobs** – A job is a project you can set up in order to **track profitability for different business processes or tasks**. For example, a landscaping company can set up jobs for each landscaping project. The benefit to setting up jobs is that you can track all the costs and revenues associated with a certain project.
- **Phases** (Available in Sage 50 Premium Accounting and higher) – A phase is a **segment of a job**. A phase can be defined as a specific period of time or a specific type of activity. For example, the landscaping company can have phases such as designing, planting, and maintaining.
- **Cost Codes** (Available in Sage 50 Premium Accounting and higher) - A cost code is a **specific cost within a phase**. Using cost codes can give you a greater level of detail for the job. For example, for the landscaping company you could have two cost codes for planting flowers, one for materials, and one for labor.

### How do I set them up?

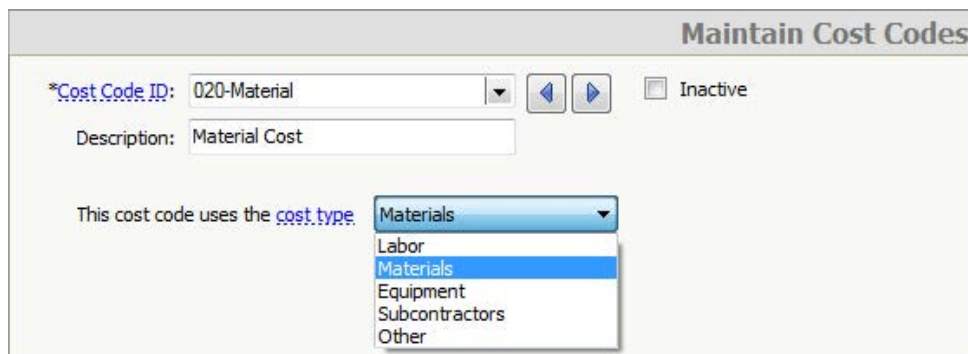
- **Jobs** – Go to the **Customers & Sales Navigation Center**, select **Jobs**, and then click **New Job**. Enter a Job ID and general information about the job such as start date, end date, and percent complete.

On the Estimated Expenses and Revenue tab, enter your current estimates. If your job uses phases, then you can enter the estimates for each phase of the job.

Phase ID	Cost Code ID	No. of Units	Expenses	Revenues
01-Design		6.00	150.00	300.00
02-Permits		1.00	75.00	0.00
03-Nursery	010-Labor	0.00	350.00	700.00
03-Nursery	020-Material	0.00	450.00	800.00
04-Ground Prep	030-Subcontract	10.00	650.00	910.00

- **Phases** – Go to the **Customers & Sales Navigation Center**, select **Jobs**, and then click **New Phase**. Enter a Phase ID, description, and specify if the phase uses a cost type or cost code

- **Cost Codes** - Go to the **Customers & Sales Navigation Center**, select **Jobs**, and then click **New Cost Code**. Enter a Cost Code ID, Description, and select the cost type.



### Did you know?

- You can **use job statuses to help you keep track of your jobs more effectively**. Go to the Customer & Sales Navigation Center, select Jobs, and then click Set Up Job Defaults. You can use the predefined job statuses or set up your own custom statuses. You can view statuses for your jobs on the Job List and the Job List report.
- You can **create up to 5 custom fields for jobs**. Go to the Customer & Sales Navigation Center, select Jobs, and then click Set Up Job Defaults. Use these fields to track additional information about your jobs.

For more info, visit: [Sage.com](http://Sage.com)  
or contact us at 866-996-7243