

Setting Up Jobs, Phases, and Cost Codes

Not available in Sage 50 First Accounting

Sage Advisor

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 Complete 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 Complete 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		5.00	125.00	275.00
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	010-Labor	0.00	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.

*Phase ID: 01-Design

Description: Design and Planning

This phase uses the **cost type**.

This phase uses **cost codes**.

Other
Labor
Materials
Equipment
Subcontractors
Other

Cost types are used to classify expenses for phases that don't use cost codes.

- **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.

Maintain Cost Codes

*Cost Code ID: Inactive

Description:

This cost code uses the cost type: **Labor**

- Labor
- Materials
- Equipment
- Subcontractors
- Other

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.

Job Defaults

[Why should I set up these defaults?](#)

General | **Statuses** | Custom Fields

[How do I use job statuses?](#)

Job Status Details

Icon:

Name:

Use as default

Job Status List

- In progress (Default)
- Pending
- Completed
- On hold

- 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.

Job Defaults

[Why should I set up these defaults?](#)

General | **Statuses** | **Custom Fields**

	Field Labels	Enabled
1.	<input type="text" value="Second Contact"/>	<input checked="" type="checkbox"/>
2.	<input type="text" value="Special Instruct"/>	<input checked="" type="checkbox"/>
3.	<input type="text" value="Site Phone #"/>	<input checked="" type="checkbox"/>
4.	<input type="text" value="Contract Date"/>	<input checked="" type="checkbox"/>
5.	<input type="text" value="Work Phone #"/>	<input checked="" type="checkbox"/>