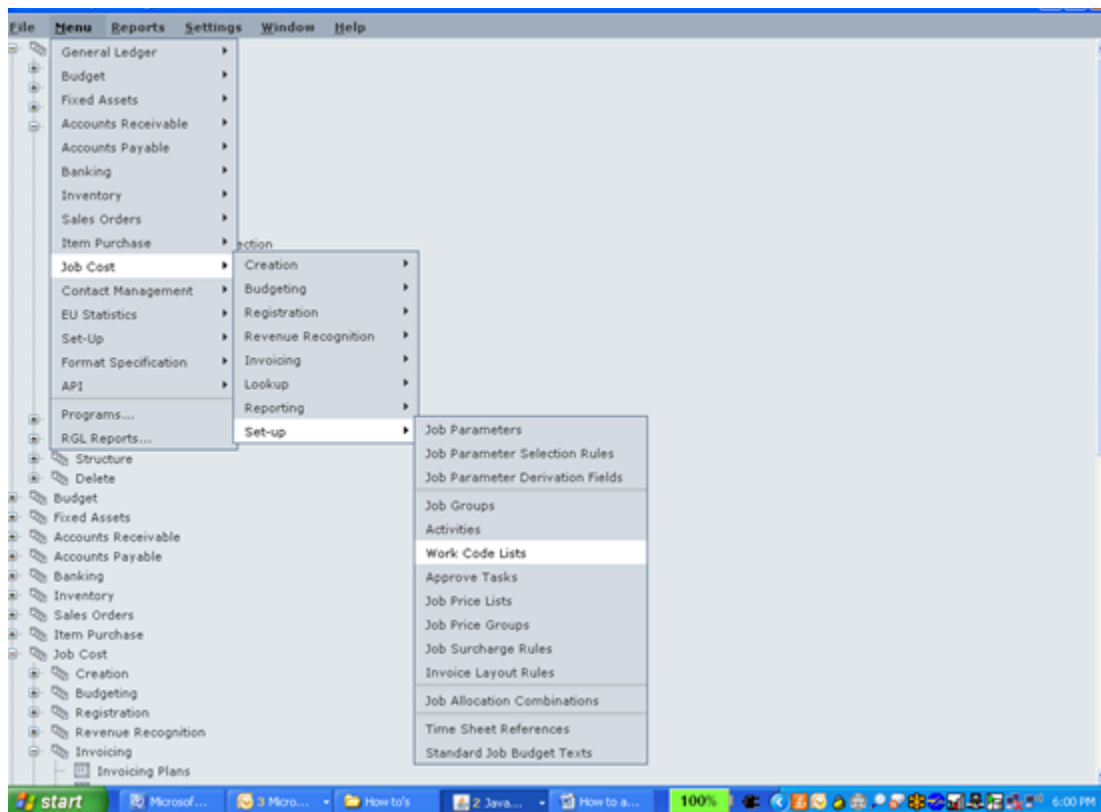


How to . . .

Add a task or work code

Purpose	To add a new task or work code to work code lists that get assigned to jobs or projects.
----------------	--

Navigate to menu > Job Cost > Set up > Work Code Lists



In this window, search for the task list you want to update with the new task.

Task Lists X

Save | More | [Icons]

Do Search | More | [Icons] | Remove filter | 19 Task List(s) shown

Search | Advanced

Criteria:	Task List	Description
1	1010146-1	Task list for job 1010146-1
2	1010146-3	Task list for job 1010146-3
3	1010232-1	Task list for job 1010232-1
4	Audit	Audit
5	Bookkeeping	Bookkeeping
6	Compilation	Compilation
7	Compliance & Advice	Compliance & Advice
8	Consulting	Consulting
9	Corporate Tax Return	Corporate Tax Return
10	Federal Tax Services	Federal Tax Services
11	Financial Management	Financial Management
12	Information Technology	Information Technology
13	Internal	Internal
14	Operations	Operations
15	Personal Tax Return	Personal Tax Return
16	Retirement Plan Servi...	Retirement Plan Services
17	Reviews	Reviews
18	Risk Management	Risk Management
19	Wealth Management	Wealth Management

Task List

Name: Retirement Plan Services

Description: Retirement Plan Services

Access Level

Name: []

Description: []

Daily Descriptions

Use Daily Descriptions

Derived Dimensions

Project

Job Specific:

Project No.: []

Standard Tasks

Registration: []

Revenue Recognition: 90000

Mileage: []

Invoicing Plan: []

Invoicing On Account 1: []

Invoicing On Account 2: []

Task	Description	Blocked	Dim. Comb. No.	Derived Act. No.	Overwrite Activity	Derived Responsible	Overwrite Responsible	Derived Executing Departm	Overwrite Executing Departm
1	21000 Consulting	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
2	21010 Extended Admin	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
3	21020 Investments- Brokered	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
4	21030 Investments- Non-Brokered	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
5	21040 Planned Documents	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
6	21050 Report Preparation	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
7	21060 Partner Review	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
8	21070 Support Staff	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
9	21080 General - Special Reports	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
10	21090 Report Preparation - Special	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
11	21100 Partner Review - Special	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
12	21110 Conference with Client	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>
13	21120 Support Staff - Special Reports	<input type="checkbox"/>		210	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>

In the table part, enter a new line and give the new work code a Number, Description, Derived Activity No. and make sure the box "Overwrite Activity" is checked. Also, there is a field called Statistics 1, if the new task being added an expense task, make sure that field is filled in with the word Expense. Otherwise, leave it blank.

Task List

Name: Description:

Project

Job Specific: Project No.:

Access Level

Name: Description:

Standard Tasks

Registration:
 Revenue Recognition:
 Mileage:
 Invoicing Plan:
 Invoicing On Account 1:

Daily Descriptions

Use Daily Descriptions:

Task	Description	Blocked	Dim. Comb. No.	Derived Act. No.	Overwrite Activity	Derived Responsible	Overwrite Responsible	Derived Executing Departm	Overwrite Executing Departm	Derived Project Type
46	73300 Misc. Administrative costs	<input type="checkbox"/>		733	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
47	73400 Recruitment Fees	<input type="checkbox"/>		734	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
48	73500 Staff insurance	<input type="checkbox"/>		735	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
49	31390 Minor purchases	<input type="checkbox"/>		736	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
50	61000 Transportation (Airfare Train Tax	<input type="checkbox"/>		610	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
51	61100 Hotel- billable	<input type="checkbox"/>		611	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
52	61200 Meals- billable	<input type="checkbox"/>		612	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
53	61300 Auto Expense- billable	<input type="checkbox"/>		613	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
54	61400 Mileage- billable	<input type="checkbox"/>		614	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
55	61500 Communications (Internet Teleph	<input type="checkbox"/>		615	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
56	61600 General Travel Expense (Curren	<input type="checkbox"/>		616	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
57	61700 Client Entertainment- billable	<input type="checkbox"/>		620	<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	
58	<input type="text" value="*"/>	<input type="checkbox"/>			<input checked="" type="checkbox"/>		<input type="checkbox"/>		<input type="checkbox"/>	

The Derived Act. No. is used to drive the postings of any entries made using the new Work Code. To see where the Activity is set post to, navigate to Menu > Job Cost > Set up > Activities. Do a search to locate the Activity and you can see each account that is affected. You should not have to change anything in the Activities window though when adding a new task or work code.

The screenshot shows the 'Activities' application window. On the left, a search results table lists activities with their IDs and descriptions. The main area displays the configuration for Activity No. 300, including its description, type, cost type, and various financial parameters like rates and registrations. At the bottom, a table shows the department and account offsets for this activity.

Criteria:	Activity No	Description
1	100	Billable ...
2	199	Billable ...
3	200	Pre-Sales
4	299	Non-Billa...
5	300	Internal ...
6	310	PTO Time
7	399	Non-clie...
8	500	Printing
9	505	Copy
10	510	Design
11	515	Shipping
12	520	Fulfillment
13	525	Chat Thr...
14	530	BzzPerks
15	535	Web Dev
16	540	Agent on...
17	545	Travel
18	550	Agent Pay
19	555	Com Dev
20	560	COGS A...
21	599	WOM Me...
22	700	6-1110 ...
23	705	6-1120 ...
24	710	Design (...)
25	715	6-1140 ...
26	720	6-1160 ...
27	725	6-1180 ...
28	730	6-1210 ...
29	735	6-1220 ...
30	740	6-1240 ...

Department	Offset Account	P&L Account	P&L, Intercompany	Sales, Taxable	Sales, Nontaxable	Export S
1	Main Depart	5-2505	5-2500	5-2500	4-1000	4-1000