WIP Report (Pro) (currently BETA)

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The WIP Report is for Managely Pro and is currently a BETA version.

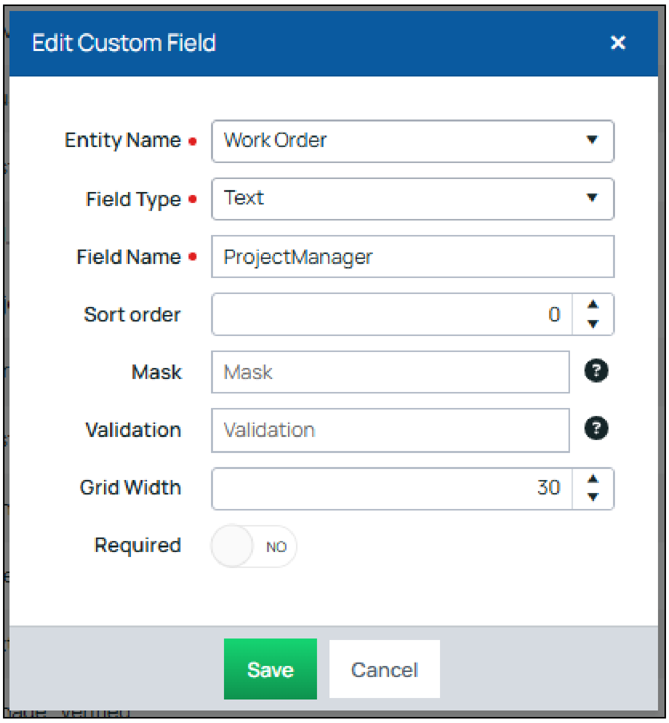
The new WIP report is for Managely Pro. It is currently a BETA version.

There is a new WIP (work in progress/work in process) Report. This is a detailed report viewable in Managely or exportable to Excel.

Using this report requires some initial setup. In addition, work orders need a work order type that has job costing enabled.

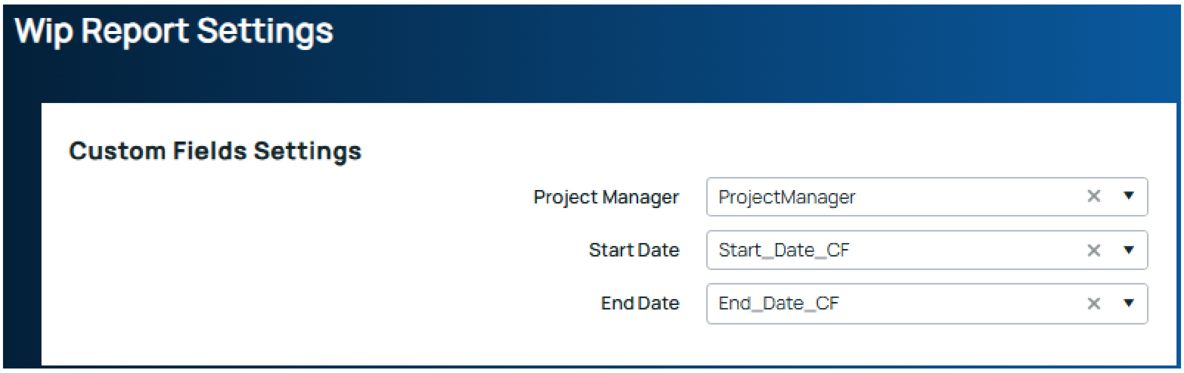
Complete these steps before running the report:

1. Add three custom fields for Project Manager, Start Date, and End Date to use on work orders:
    a. Browse to Setup > Operations > Custom Fields.
    b. Click the Add Custom Field button. The Add Custom Field form opens.
    c. In the Entity Name field, choose Work Order.
    d. In the Field Type field, select a type for the custom field. For example, text for Project Manager and Date for Start Date and End Date.
    e. Type a Field Name. For example, ProjectManager for Project Manager. Note that this field does not accept spaces. This is the label users will see on the work order Custom Fields tab.
    f. Other selections on the form are optional. Note: If using the field Sort Order, add a sort order for every custom field on the entity to help them appear in the correct order.
    g. Save the form.

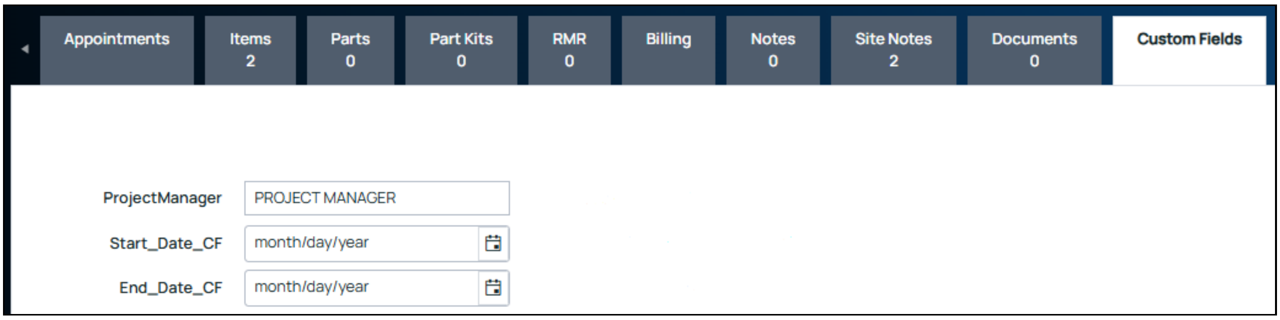


2. Select the custom field settings:
    a. Browse to Setup > Reports > WIP Report Settings.
    b. In the Project Manager field, choose the custom field added for project manager.
    c. In the Start Date field, choose the custom field added for the start date.

d. In the End Date field, choose the custom field added for the end date.



3. dd information in these custom fields on work orders.
    a. Browse to Accounts Receivable > Work Orders.
    b. On the Work Orders page, click a work order number in the WO# column.
    c. Click Edit to edit the work order.
    d. Click the Custom Fields tab.
    e. Enter information for the custom fields.
    f. Save the work order.



Running the WIP Report

Browse to Reports > Accounts Receivable > WIP Report.

Select any of these options for the report:

- Bill To Date
- Order By
- Sort Descending checkbox: This orders the report by Lead Name, ascending or descending.

Click the Preview button.

View the report in Managely or export it to Excel. Note: This report was designed for exporting to Excel. Exporting to other file formats may not display as expected.

On the report results:

- The Job Name/Number column refers to the work order description.
- The Contract Amount column is the sales price on the work order.
- The Cost Percent Complete is Actual cost to Date divided by the Projected Cost.
- The Total Estimated cost is different from projected cost. It will affect calculation in JTD (job to date) Earned.
- The J T D Earned column is the percent complete based on the cost and multiplied by the revenue. The

percent complete comes from the cost tab (job costing).

- The Projected Cost column is the higher of each portion (parts, labor, etc.) of either the actual cost or estimated. For example, if parts are estimated at $5,000 but only $3,000 was spent, parts would be $5,000, and then if labor was estimated at $7,500 but costs were $8,200 then labor would be $8,200. The Total Estimated would be $12,500; the Total Cost would be $11,200; and the Total Projected would be $13,200.
- The Actual Cost to Date column are all costs posted to the work order (labor costs used and part costs).
- The Projected Profit column is the Contract Amount minus the Projected Cost.
- The Actual Hours QTY column comes from the timesheet labor hours.
- The estimated cost refers to the proposal cost, which can be verified under the Proposal Overview tab or the Work Order Job Costing tab.
- Tax is included in the contract amount.