

WIP Report (Pro) (currently BETA)

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The WIP Report is for Managely Pro and 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.

Entity Name • Work Order

Field Type • Text

Field Name • ProjectManager

Sort order 0

Mask Mask ?

Validation Validation ?

Grid Width 30

Required NO

Save Cancel

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.

Wip Report Settings

Custom Fields Settings

Project Manager	<input type="text" value="ProjectManager"/>	✕ ▼
Start Date	<input type="text" value="Start_Date_CF"/>	✕ ▼
End Date	<input type="text" value="End_Date_CF"/>	✕ ▼

3. Add 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.

Appointments	Items 2	Parts 0	Part Kits 0	RMR 0	Billing	Notes 0	Site Notes 2	Documents 0	Custom Fields
ProjectManager	<input type="text" value="PROJECT MANAGER"/>								
Start_Date_CF	<input type="text" value="month/day/year"/>								
End_Date_CF	<input type="text" value="month/day/year"/>								

Running the WIP Report

Browse to Reports > Accounts Receivable > WIP Report.

Select any of these options for the report:

- Start Date
- End Date
- Billed 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.
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