

Revenue Jobs

We have added a new flag to each job called “Revenue Job”. By default, each new job will be classified as a revenue job.

But if it is “request for quote”, it will not be classified into a revenue job until the quote has been approved.

The revenue job filter is on reports and the job and task list.

The screenshot shows a complex filter interface with multiple dropdown menus. A red box highlights the 'Revenue Jobs' dropdown menu, which is currently open and shows the following options: '<Revenue Jobs>', '<Revenue Jobs>', 'Yes', and 'No'. The 'Yes' option is selected. Other filters visible include 'Open / Closed', 'Reactive / Planned', 'Contract', 'Site', 'Resource', 'Assigned User', 'Team', 'Job Priority', 'Job Type', 'Sub Type', 'Order Number', 'Job Number', 'Status', 'Sub Status', 'Job Type Relevance', 'Performance', 'Alerts', 'Created Date', 'Location', 'Sub Location', 'Regions', 'Site Type', 'Job Category', 'Planned Schedule', 'Schedule Category', 'Schedule Group', 'Compliance Type', 'Asset Class', 'Asset Sub Class', 'Assets', 'Quote Job', 'Contractor Quote Status', and 'Sales Quote Status'.

And you can choose whether to include or exclude revenue jobs from the dashboards. This setting can be found in Settings -> Job Settings -> Finance Settings.

The screenshot shows the 'Finance Settings' section of a software interface. The 'Show Non-Revenue Jobs On Dashboard' setting is highlighted with a red box and is currently set to 'No'. Other settings include 'Include Sales in Costs and Quotes' (set to 'Yes'), 'Expected Sales Margin', and 'Xero Sales Invoicing Enabled' (set to 'No'). A 'Help' button is visible at the bottom of the section.

Setting	Value
Show Non-Revenue Jobs On Dashboard	No
Include Sales in Costs and Quotes	Yes
Expected Sales Margin	
Xero Sales Invoicing Enabled	<input type="radio"/> Yes <input checked="" type="radio"/> No