



Job Codes Explained

Intro: This document explains what the concept of “job codes” means in SMMware, and how it may be useful to you. In short, job codes allow you to charge a different hourly rate for different tasks (Packing, Organizing, etc) within the same Job.

Part 1, The Basics

In understanding a concept it is often helpful to understand the relevant history. The first and simplest approach to charging clients that SMMware supported was to add up the hours, then multiple the total hours by a single overall rate to arrive at the dollar amount.

However, what if you want to charge \$60/hr for one type of work (Ex:Packing), and \$80/hr for another type of work (Ex: Floorplans)? If you hold a 3 hour consultation with a potential client and want to give the first hour free and then charge for the remainder, how should the software you use handle that? What if you want to charge \$70/hr for time that you, as company owner spend, but \$60/hr for time spent by your employees, even though you are doing the same type of work (you presumably have more experience so your time is more valuable)?

The concept of “Job codes” added to SMMware as an answer to the above questions. A “Job Code” is simply the combination of a label (like Packing), and an hourly rate.

Examples:

- 1) ‘Packing - Associate’: \$60/hr,
- 2) ‘Packing - Company Owner’: \$70/hr,
- 3) ‘Floorplans’: \$80/hr

When employees enter their hours, they pick the applicable job code (they don’t see what the client is charged, just the name of the job code).

Job Codes are defined once, in the Settings Editor, and shared across all jobs. A default hourly rate for each job code is also entered in the Settings Editor.

Whenever a Sales Lead or Job are created, they get their own separate copy of the default rates to use for job codes. In a Sales Lead Profile or a Job Profile, use the ‘Edit Rates’ button below the ‘Job Codes’ label to change the rates from the defaults. For a Job, rates remain editable until an invoice is created for that Job.

Custom job codes rates do not apply for SMMware sites that integrate with QuickBooks Desktop, due to limitations on the QuickBooks end (QBD does not allow SMMware to specify a rate to use, but rather QBD assumes it will use the rate that it has in its own data).

The next page will help clarify by example.



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There are two basic approaches to how you can charge a client in SMMware:

- 1) Using the same hourly rate regardless of task type
- 2) Using a different hourly rate per task type, labelled as 'job codes'

Example 1) Job Profile 1 (Client Jane Doe, Job ID 235, Downsize and Move)

Client Fee Model: **Per Job Rate**

Hourly Rate: \$60/hr

Description	Job Code	Rate	Hours	Subtotal
Decluttering	Decluttering, \$60/hr	\$60.00/hr	10	\$600.00
Organizing	Organizing, \$60/hr	\$60.00/hr	5	\$300.00
Floorplan	Floorplan, \$80/hr	\$60.00/hr	20	\$1,200.00
Packing	Packing, \$65/hr	\$60.00/hr	10	\$600.00
Unpacking	Unpacking, \$65/hr	\$60.00/hr	10	\$600.00

Example 2) Job Profile 2 (Client John Smith, Job ID 236, Downsize and Move)

Client Fee Model: **Per Job Codes**

~~Hourly Rate: \$60/hr~~

Description	Job Code	Rate	Hours	Subtotal
Decluttering	Decluttering, \$60/hr	\$60.00/hr	10	\$600.00
Organizing	Organizing, \$60/hr	\$60.00/hr	5	\$300.00
Floorplan	Floorplan, \$80/hr	\$80.00/hr	20	\$1,600.00
Packing	Packing, \$65/hr	\$65.00/hr	10	\$650.00
Unpacking	Unpacking, \$65/hr	\$65.00/hr	10	\$650.00



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Part 2, What Job Code 'Levels' Are, & Why They Are Useful

Suppose there is a job code called "Owner's Time" with a high hourly rate. Presumably, you don't want a brand-new entry-level associate accidentally using this job code. How can we arrange that?

The answer is to divide the overall list of Job Codes into groups and control which of those groups Associates have access to when entering hours. Usually employees in a company are in a hierarchy, starting with entry level employees, with managers at a higher level, and then the company owner at the highest level. So SMMware calls groups of job codes 'Levels'.

SMMware provides 5 Levels for your Job Codes, and the ones you don't move can have 'Active' set to 'No', so as to hide them. You can name these levels as you like.

Below is the list of Levels, found in the Settings Editor, Section 6, Job Codes.

Job Code Levels group the job codes into sets. Each associate is assigned to a set and sees only that set when entering hours. One common usage is for Team Leads to have one set of job codes and Team Members to have another.

Job Code Levels	Name	Active
Level 1	Normal	Yes
Level 2	Senior	Yes
Level 3	Level 3	No
Level 4	Level 4	No
Level 5	Level 5	No

Below is an example definition of a job code (in this case labeled 'Packing – Associate') which is assigned to the job code Level labeled 'Normal'.

The screenshot shows the configuration for a job code named "Packing - Associate". The "Level" dropdown menu is open, showing options: Normal, Senior, Level 3, Level 4, and Level 5. "Normal" is selected. Other settings include Client Rate: \$67.00, Pay Level: Team member, Wknd Pay Level: --No weekend Pay Level--.

Lastly, each Associate can be given access to one or more Job Code 'Levels', by editing their Associate Profile. Below is a snippet from an Associate Profile, showing that this associate has access to the 'Senior' Level of Job Codes. On a Windows device, hold the CTRL key while picking more Levels after the first one. On a Mac, hold the command key.

The screenshot shows an Associate Profile for Janet Terry Bach. The "Job Code Level" dropdown menu is open, showing options: Normal and Senior. "Senior" is selected. Other fields include First Name: Janet, Middle Name: Terry, Last Name: Bach, Start Date: 2012-02-14, Hire Date: 2012-06-14, Last Exit Date, Color, and Invitable: Yes.



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FAQs

Q1) Do I have to choose one approach and then use that for every job?

A1) No, one particular job can charge the client based on one overall hourly rate, while another job can charge based on job codes. The choice is made in the Job Profile for each job.

Q2) Can you clarify the difference between the concepts of “Job Types” and “Job Codes”?

A2) Each job has one and only one “Job Type” assigned to it. The job type is intended to describe the overall goal of the job. Various kinds of tasks can be involved. For example, a “Downsize and Move” job may require 5 or more job codes to describe the various kinds of work involved, like “Packing” and “Floorplan”.

If the overall goal of a given job is very simple, like “Packing”, then it may only call for a single job code (like “Packing”). At that basic level, job codes do in fact become redundant, and you could just use the single hourly rate approach, without job codes.

Q3) For packing materials, do I use job codes?

A3) No, job codes only apply to hourly work, and are a way to indicate the hourly rate to charge. If you want to account for packing materials on a box by box basis, you can use SMMware’s “Inventory” command. If you feel that it is too much effort to track each box and want to charge a single blanket fee for packing materials, you can use SMMware’s “Flat Fee” command.