

# Beyond - Utilizing Job Order and Assignment Adjustments

Last Modified on 08/21/2024 2:40 pm CDT

## What are Job Order & Assignment Adjustments?

Job Order and Assignments adjustments allow you to add specific reimbursements, charges, and/or billing amounts to a transaction each week. These adjustments are reoccurring, just like employee adjustments, but are specific to the Job Order/Assignment being worked and require that units be entered on them.

Great examples of these types of adjustments include reimbursements such as mileage, phone plans, bus passes, etc. These options may differ in total amount for each week worked.

**\*Note\*** If you utilize custom Security Groups with Advanced Permissions, you will need to add the "Access" to the "Adjustments" forms and pages within Job Order, Assignment, and Time Entry to the Security Groups that require the functionality:

The screenshot shows a permissions matrix for the 'adjustment' search term. At the top, there are tabs for 'BY PAGE' and 'BY FIELD', and a note 'Selecting a parent selects children' with a checkmark. The search bar contains 'adjustment' and a close button. The matrix lists various system components with their corresponding access levels:

Component	Access
Job Order	Access
Adjustments (1) Page	Access
Assignment	Access
Details	
Adjustments (1) Page	Access
Time Entry Page	Access
Add or Edit Time Entry Adjustment Form	Access
Adjustment Document (1) Form	Access
Assignment Adjustment Form	Access

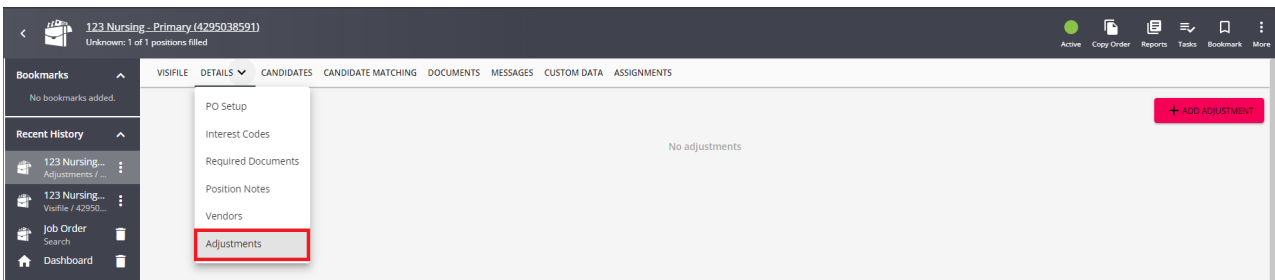
For more information on created custom Security Groups with Advanced Permissions, please see the following article titled "[Beyond - Creating Security Groups with Advanced Permissions](#)".

## Adding an Adjustment to a Job Order or Assignment

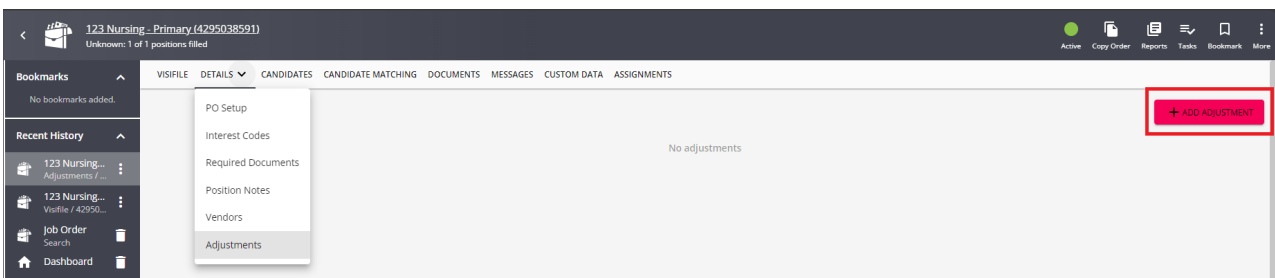
Begin by navigating to the Job Order or Assignment record you want to add the adjustment to.

**\*Note\*** Adding the adjustment on the Job Order will automatically add the adjustment to any new assignment created but will **not** update current assignments.

Select Details > Adjustments:



Select the "+ Add Adjustment" button to the right to open the Add "Job Order/Assignment" Adjustment window:



Fill out the following information:

- Select the **Adjustment Type** from the drop down.

**\*Note\*** Adjustment Types are able to be added/configured within Enterprise Administration.

- Enter the default **Pay Rate** (if this is a payable adjustment).
- Enter the default **bill rate** (if this adjustment is billable).
- Select the **Pay Code** that this adjustment will appear on (ex. Reg vs. Holiday vs. Bonus)

**\*Note\*** Only one adjustment type can be applied to a pay code, as they cannot overlap in the system.

Add Job Order Adjustment

\* Adjustment  
 Mileage ▼

Pay Rate  
 0.50


Bill Rate  
 0.60

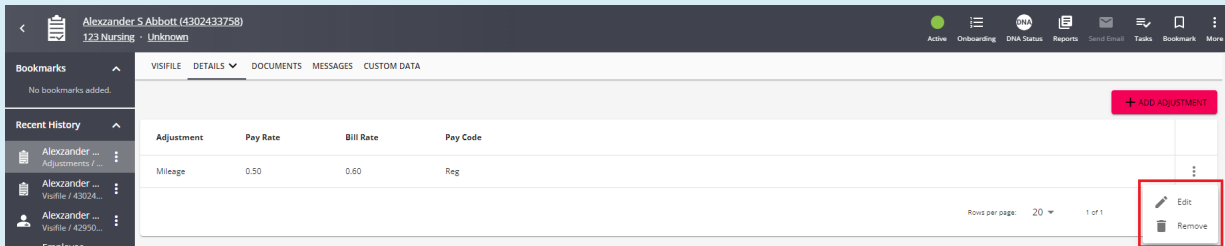
\* Pay Code  
 Reg ▼

SAVE AS DRAFT CANCEL SUBMIT

In the example above, the Mileage adjustment applies only when paying Regular Pay (not on Bonuses or Holiday Pay) & is paid at \$0.50 per mile and billed back to the client at \$0.60.

Select "Submit" to save the adjustment to the Job Order/Assignment record.

**\*Note\*** Job Order and Assignment adjustments can be edited/removed from the respective record by navigating to the Job Order/Assignment Record > Details > Adjustments, selecting the  icon to the right of the adjustment, and selecting "Edit" or "Remove" depending on your preference:



## Processing Job Order/Assignment Adjustments in Time Entry

When timecards are created each week for assignments, payroll processors will need to review and enter information on the assignment adjustments before they will be processed through payroll and billing.

Navigate to B Menu > Timecards > Time Entry:

Time Entry

Bookmarks  
No bookmarks added.

Recent History  
Time Entry  
Time Entry

Shortcuts: \* = Customer Name, + = Employee Name

FILTER BY Employee Name Starts With What are you looking for...

Week 7/28/2024 Branch All Display Options Show Linked, 11 Others...

Search limited to the first 1000 of 4086 results. Consider narrowing your search. [Learn more](#)

Drag a column header here to group by that column

Stat...	Name	Customer	Pay Co...	RT Hours	OT Ho...	DT Hou...	Pay Rate	Bill Rate	W/E Da...	Actions	Has Assg Adj ↓
▼	<a href="#">Abbott, Solomon S</a>	<a href="#">3M</a>	Reg	0	0	0	10.00	20.00	7/28/2024	⋮	✔
▼	<a href="#">ABARCA, MARIA TERESA</a>	<a href="#">ABC 123</a>	Reg	0	0	0	20.00	30.00	7/28/2024	⋮	✔
▼	<a href="#">zzQuickEmpo, zzQuickEmp</a>	<a href="#">Aperture</a>	Reg	0	0	0	33.00	39.60	7/28/2024	⋮	✔
▼	<a href="#">Johnson, Riley</a>	<a href="#">Chet West RC Staffing</a>	Reg	0	0	0	24.00	30.00	7/28/2024	⋮	✔
▼	<a href="#">Aaranson, Aaron A</a>	<a href="#">JMC Roofing</a>	Reg	0	0	0	20.00	30.00	7/28/2024	⋮	✔

Timecards with assignment adjustments will show adjustment information under the detailed timecard (select the ^ to the left of the timecard):

Drag a column header here to group by that column

Stat...	Name	Customer	Pay Co...	RT Hours	OT Ho...	DT Hou...	Pay Rate	Bill Rate	W/E Da...	Actions	Has Assg Adj ↓
▼	<a href="#">Abbott, Solomon S</a>	<a href="#">3M</a>	Reg	0	0	0	10.00	20.00	7/28/2024	⋮	✔
▼	<a href="#">ABARCA, MARIA TERESA</a>	<a href="#">ABC 123</a>	Reg	0	0	0	20.00	30.00	7/28/2024	⋮	✔

Navigate to the "Adjustments" tab and select an adjustment within the "Available Assignment Adjustments" section:

Drag a column header here to group by that column

Stat...	Name	Customer	Pay Co...	RT Hours	OT Ho...	DT Hou...	Pay Rate	Bill Rate	W/E Da...	Actions	Has Assg Adj ↓
^	<a href="#">Abbott, Solomon S</a>	<a href="#">3M</a>	Reg	0	0	0	10.00	20.00	7/28/2024	⋮	✔

PAYROLL SUMMARY  
System Engineer  
For Weekend Bill 7/28/2024

W/E Date 7/28/2024 Work Date Invoice Date PO Number Payroll Note

Reg

Pay and Bill Rates

**Adjustments**

Overrides

Codes

EMPLOYEE ADJUSTMENTS +

AVAILABLE ASSIGNMENT ADJUSTMENTS

Equipment  
10.00 pay rate / 0.00 bill rate >

ADJUSTMENT SUMMARY

Total Amount of Bill 0.00 Total Amount of Billed Pay 0.00

Total Amount of Unbilled Pay 0.00

If the adjustment applies for this week, you will need to add the number of Units:

- For options like mileage, this would be the number of miles.
- If this is a flat rate adjustment, you may just need to enter 1 unit to be paid and/or billed at the amounts specified.
- You can also update the pay/bill rate if it is different this week. Just remember that it will go back to the previous rate next week because that is how it is entered on the assignment.

### Assignment Adjustment

\* Adjustment  
Equipment

Pay Amount: 10.00      Bill Amount: 0.00

Units: 1

Unit Pay Rate: 10.00      Unit Bill Rate: 0.00

Invoice Text

SAVE AS DRAFT      CANCEL      SUBMIT

**\*Note\*** If you are entering assignment adjustment information often and need help identifying which transactions have adjustments, you can add the "Has Assg Adj" column (right click on the column headers in Time Entry). This will provide a visual indicator to show this timecard has an assignment adjustment that may be applicable.

The screenshot shows a Time Entry interface with a search bar and a table of timecards. A context menu is open over the column headers, and the 'Has Assg Adj' option is selected and highlighted with a red box. The table below shows a timecard for 'Abbott, Solomon S' with columns for RT Hours, OT Hours, DT Hours, Pay Rate, Bill Rate, W/E Date, Actions, and Has Assg Adj (indicated by a green checkmark).

Stat...	Name	Pay Co...	RT Hours	OT Ho...	DT Hou...	Pay Rate	Bill Rate	W/E Da...	Actions	Has Assg Adj
^	Abbott, Solomon S		0	0	0	10.00	20.00	7/28/2024	⋮	✓

Once the information has been confirmed, select "Submit".

Once the adjustment information has been verified for all timecards, you can continue to proof and pay/invoice as normal.

## Related Articles