



uWork user manual

By Openix Solutions LLC





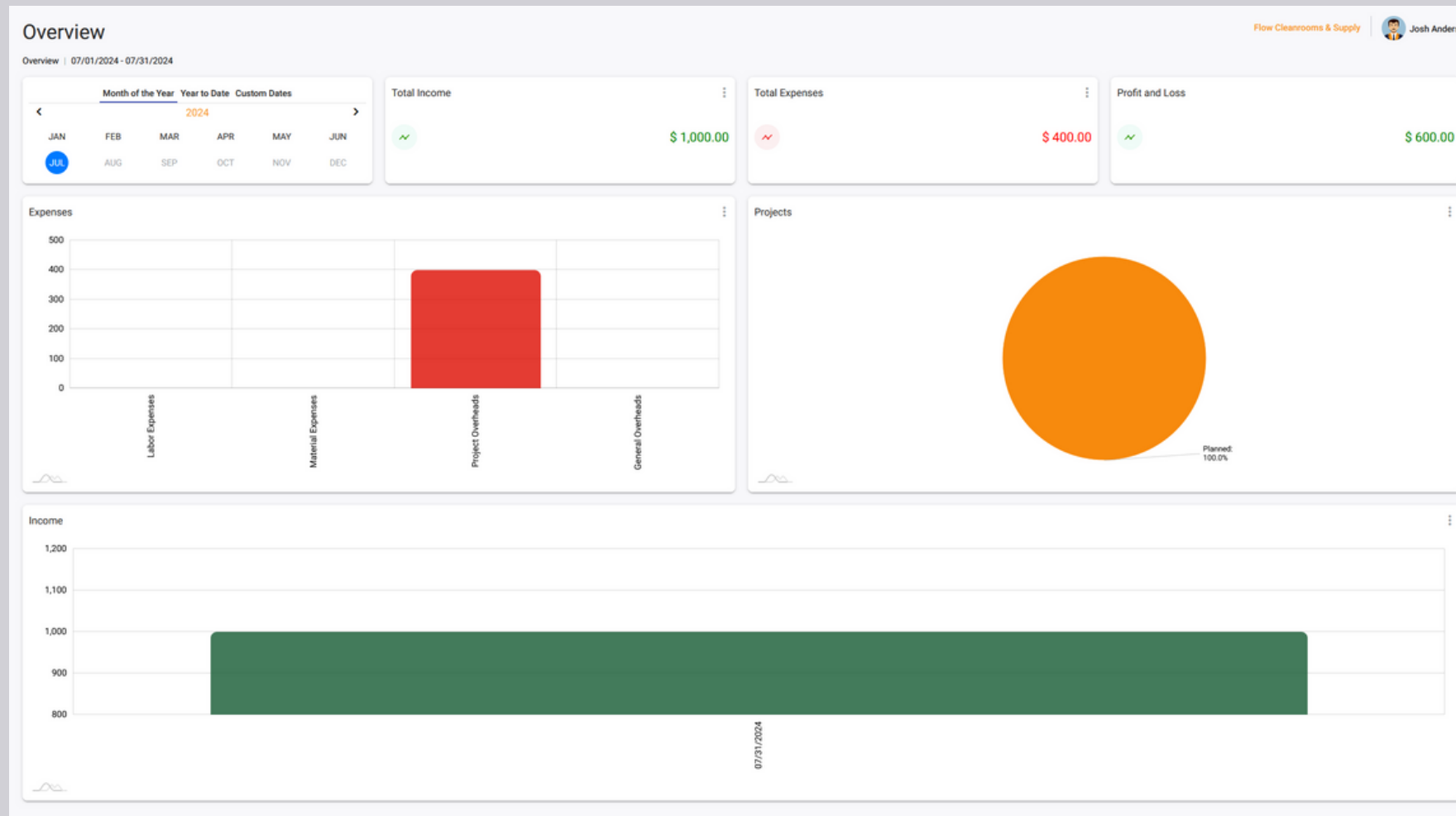
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uWork application

uWork has two parts to its solution: a web application is meant to be an administration panel for setting up your organization, users, and all other custom parts, while mobile application is meant for workers to see, update their assignments and progress.

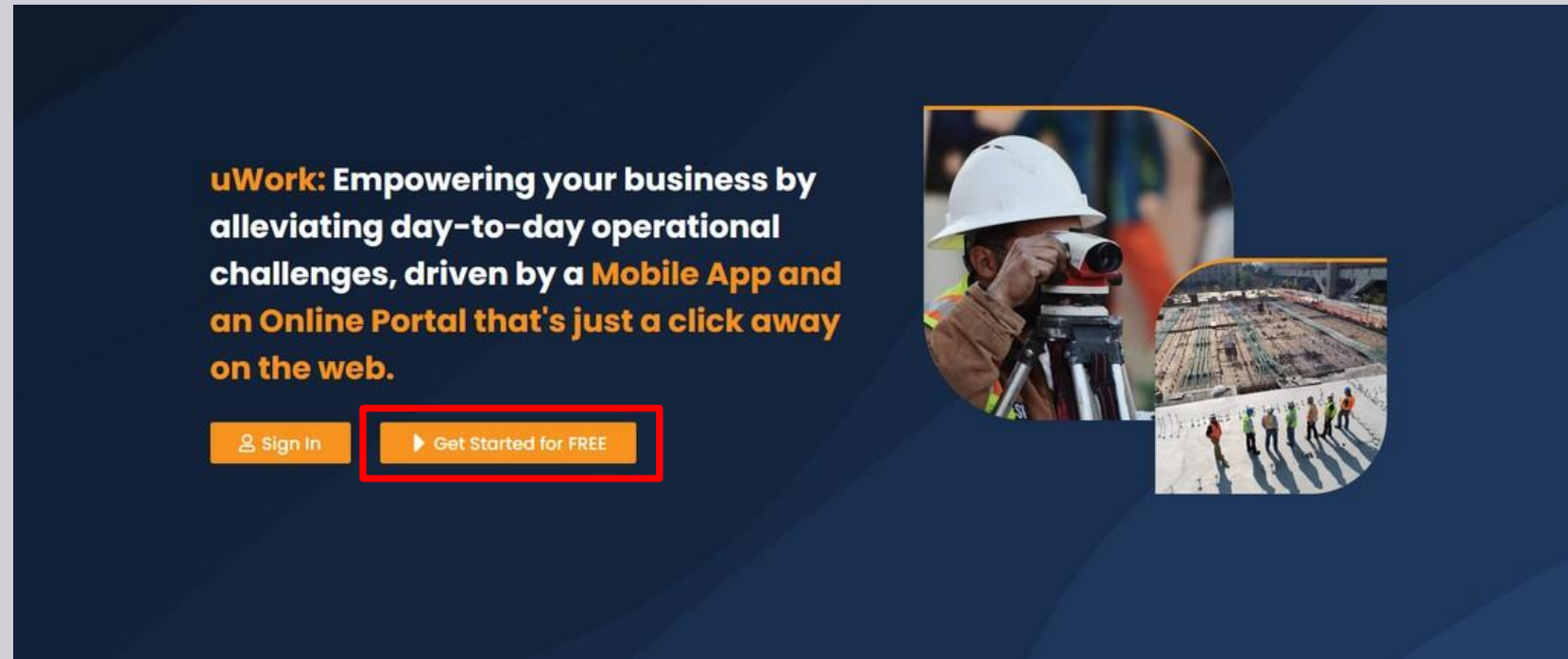


The screenshot shows the 'uWork Construction' app page. It includes the app title, a '10+' rating, and a 'PEGI 3' rating. There are buttons for 'Įdiegti' (Install), 'Bendrinti' (Share), and 'Pridėti į pageidavimų sąrašą' (Add to wishlist). Below the text 'Ši programa pasiekama visuose jūsų įrenginiuose' (This program is available on all your devices), there is a carousel of mobile app screenshots showing features like 'Customers', 'Customer Info', 'Work Force', 'Resource Info', 'Projects', and 'Project Details'. A 'Programos palaikymas' (App support) dropdown menu is visible on the right.



Creating uWork account

1.



To create a uWork account, click on the button “Get started today.” This will lead you to the sign-up page.

2.

Sign Up

Email * Phone *

Password * Confirm Password *

First Name * Last Name *

Address 1 *

Address 2 City *

State * Zip *

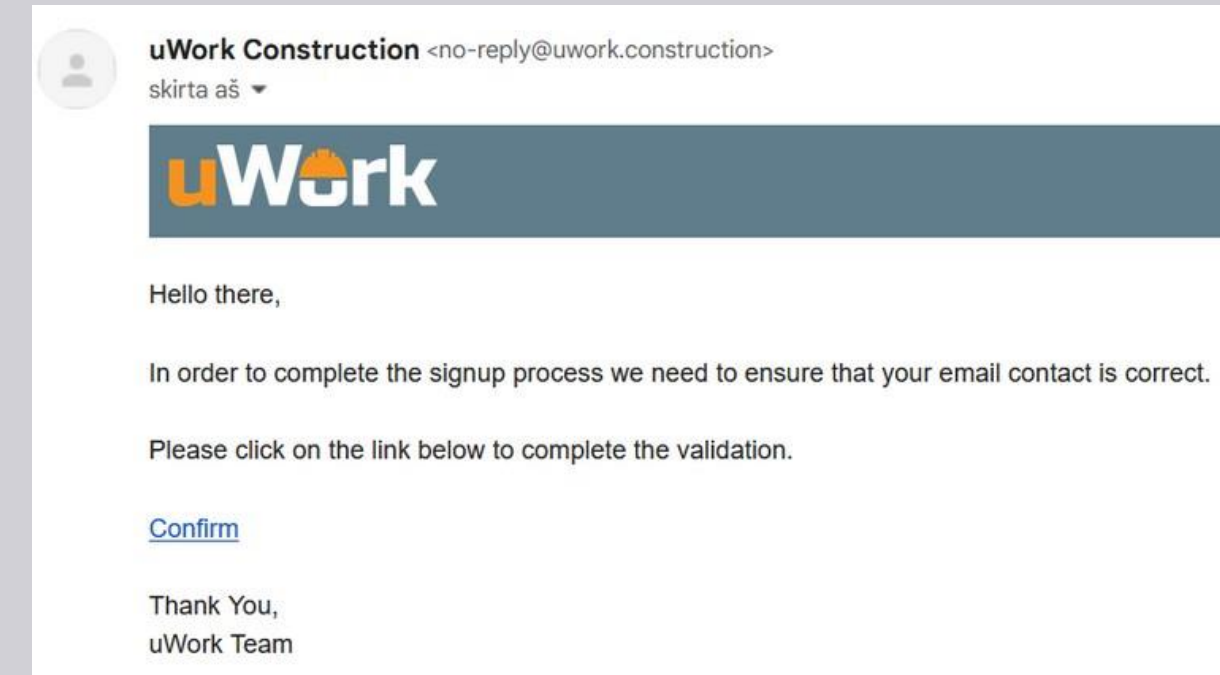
Country *

Organization Name *

SIGN UP

Already have an account? [Sign In](#)

3.

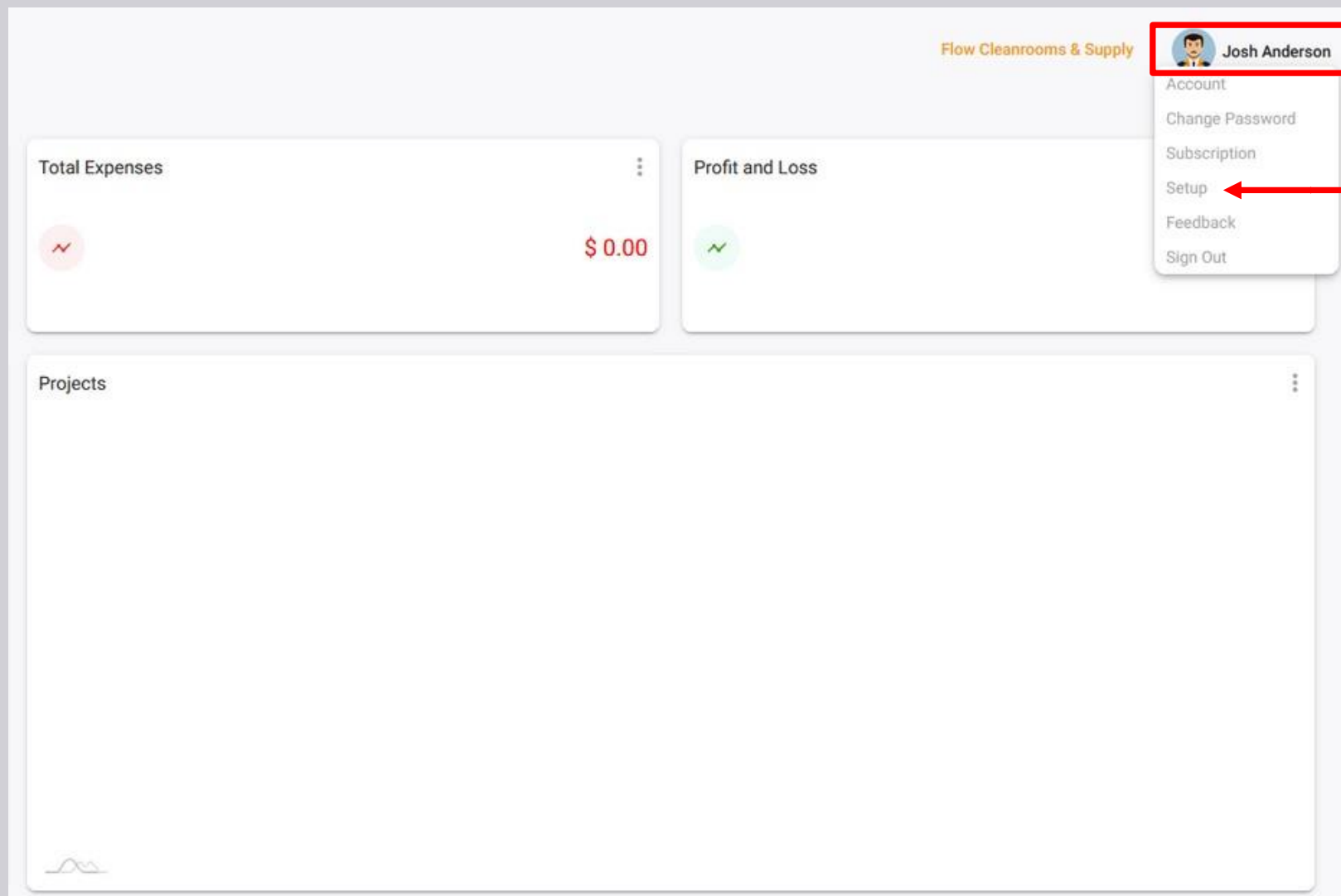


After creating your account, you will get a message in your email that will let you validate your account.

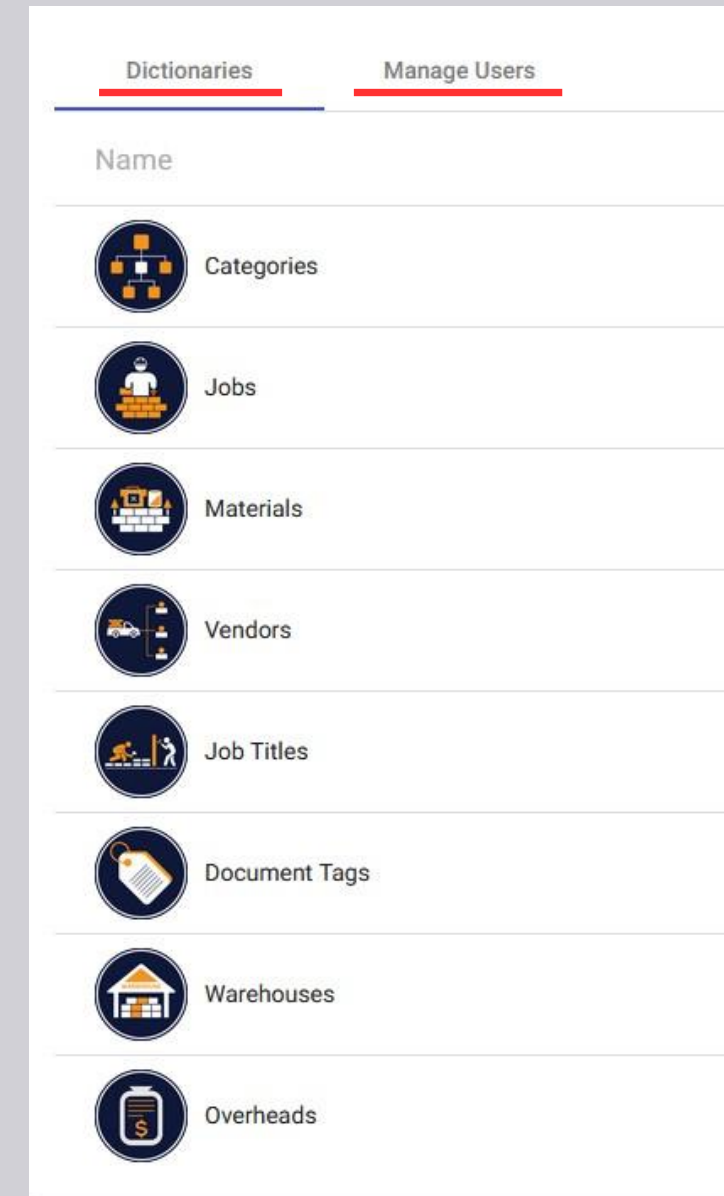


Getting started on uWork

When you log in to the uWork web application, you will end up seeing an overview of your projects. First step: go to the right upper corner and click on your name; there you will see the option "Setup."



1.



2.

This is the most important part of setting up. Dictionaries are separated by different tags: categories, jobs, materials, vendors, job titles, document tags, warehouses, and overheads, which you will use in your business. Also, there is a tab to manage application users.



All of the dictionaries work in the same manner and are important tools for creating your projects. By properly setting up dictionaries of words and phrases, you will be able to quickly create and edit your projects. These dictionaries already have some essential category names that you can use in your projects, but it is important to add your own names and phrases to personalize projects. You can add these words yourself by pressing the “plus” icon.

← Back
Setup | Job Categories

Search Type: Intelligent Partial

Show Inactive

Create Job Category ×

Name *

CREATE

Category Name	Is Custom	
INTERIOR FINISH	<input type="checkbox"/>	⋮
UTILITIES	<input type="checkbox"/>	⋮
APPLIANCES	<input type="checkbox"/>	⋮
PLUMBING	<input type="checkbox"/>	⋮
SITE PREP	<input type="checkbox"/>	⋮
HOME INSPECTION - Electrical	<input type="checkbox"/>	⋮
ON-SITE WATER/SEWER	<input type="checkbox"/>	⋮
FIRE SUPPRESSION	<input type="checkbox"/>	⋮

3.

Manage your work force and invite users to uWork



To manage your work force (employees, sub-contractors), navigate to the menu on the left side and click on "work force." Here you can either add your work force as an individual or a company. Also, to be able to invite your work force to the application, click on the button "Allow Resource to Sign in" and write their email. To learn how to send an email invitation to your workers, go to the next page.

1.

Resource Name	Job Title
Lucas Brown	Grounds Cleaner

2.

3.



To invite users to the application via email, go to your profile and click on "setup." Here you will see the option "Manage users." There are two options: either to invite users or to create users. Click on the envelope icon to invite new users to the uWork application. By downloading the mobile app and signing in, workers will be able to see what jobs are assigned to them and be able to report their progress.

1.

- Account
- Change Password
- Subscription
- Setup
- Feedback
- Sign Out

Manage Users

Search: Full Name Show Inactive

Resource	Has Registered	Roles
Josh Anderson	Yes	Admin
Lucas Brown	Yes	Worker

2.



3.

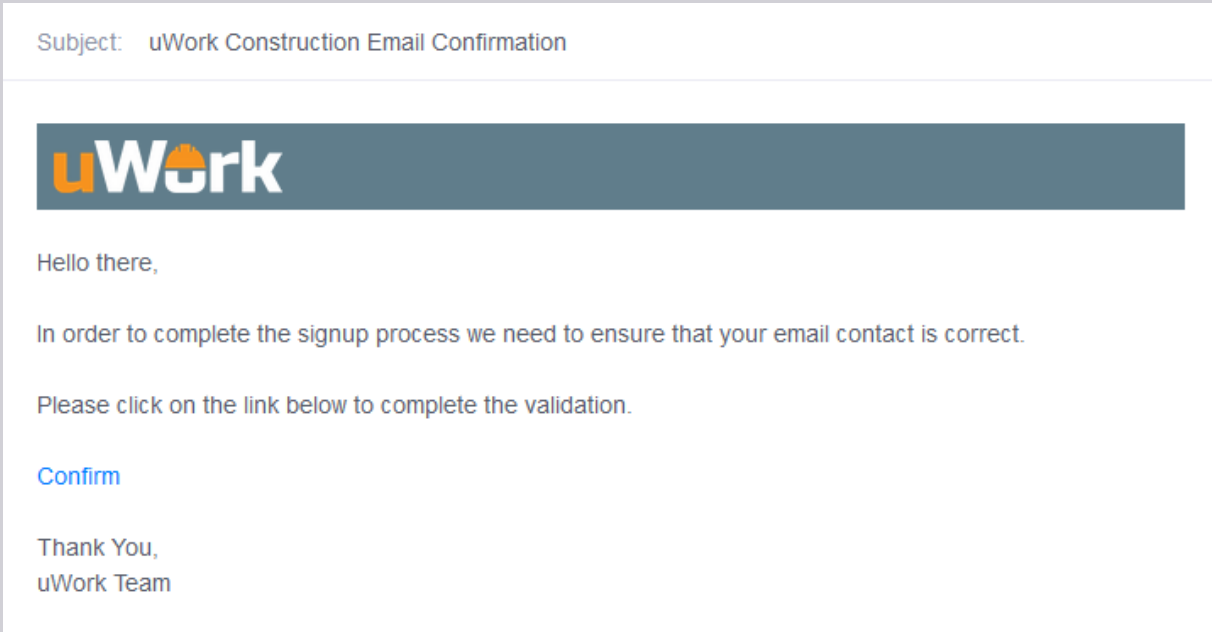
Invite User

Email *

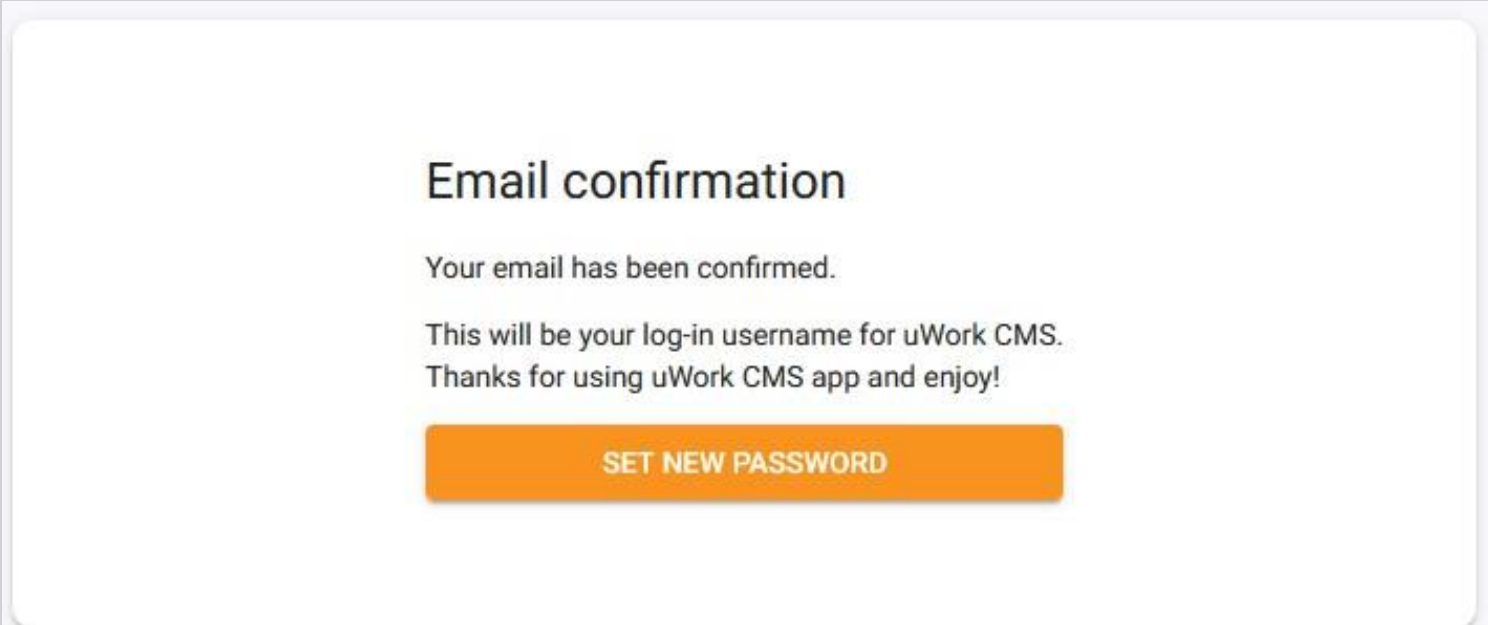
INVITE



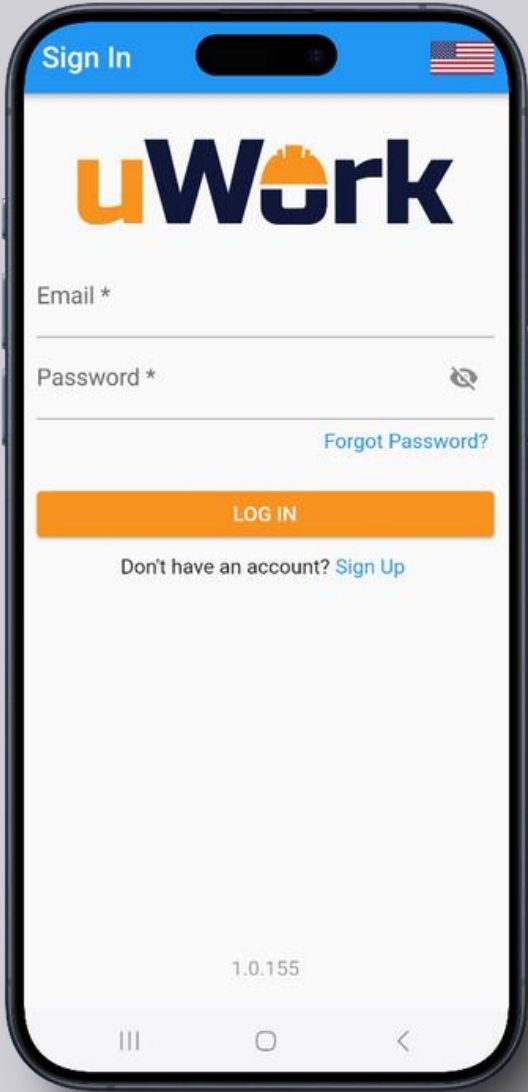
After getting a message via email, new users will be prompted to set a new password, which they can use to sign in to the to the uWork mobile app.



1.



2.

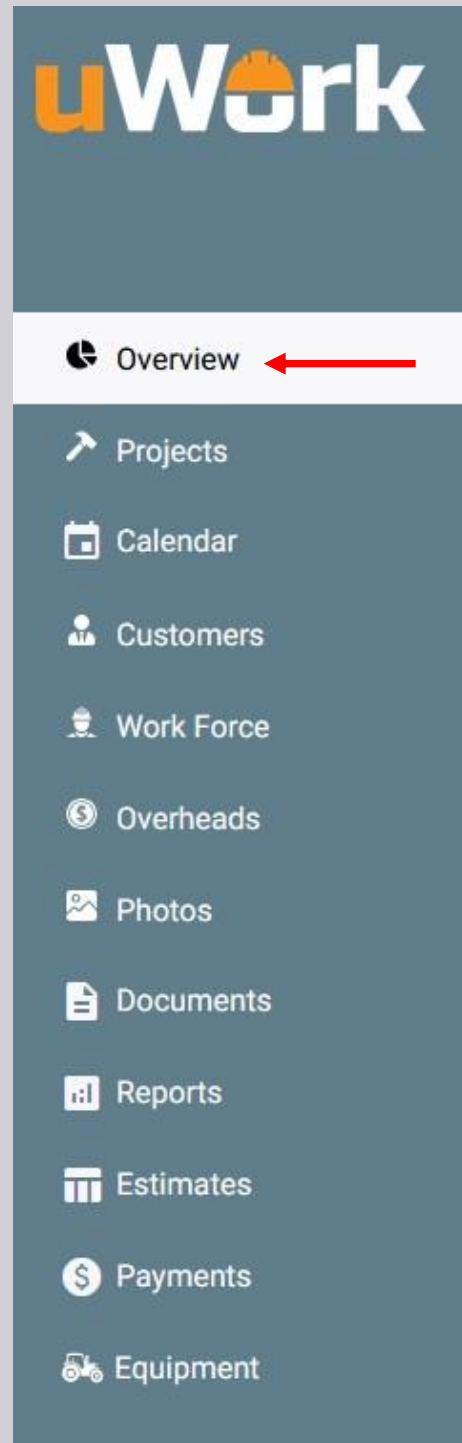


3.

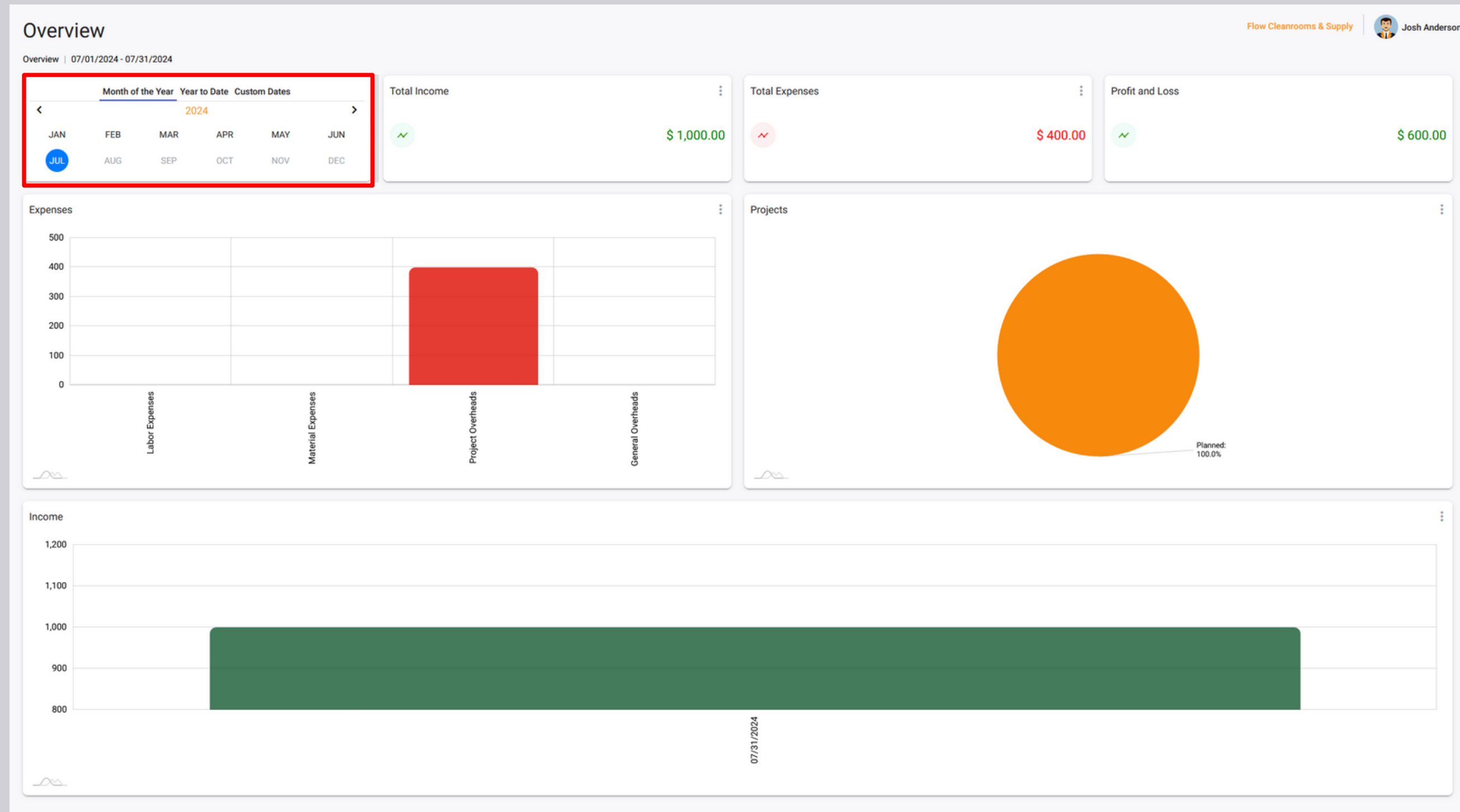


Applications main features

In the overviews option, you can see every important detail about your current projects. Here, you can select which month or year projects you want to see and get a short summary of their expenses, income, and overall status.



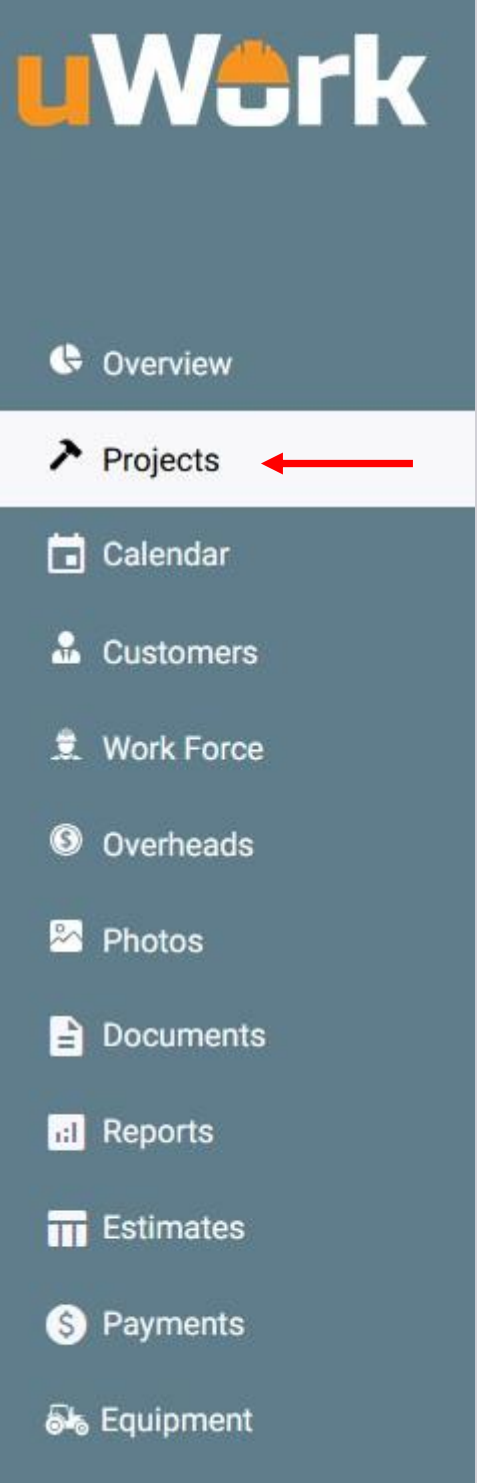
1.



2.



The project segment is the main part of your work where you will create new projects, manage its work force, jobs, documents, overheads, payments, and other crucial information. To learn how to create your first project on uWork, go to page 21.



1.

Projects Flow Cleanrooms & Supply Josh Anderson

All Projects Planned In Progress Completed Cancelled

Q, Project Name Q, Customer Name

Project Name	Customer Name	Date	Contracted Amount	Paid Amount	Status
Surveying	John Smith	07/31/2024	\$2,000.00	\$1,000.00	Planned

Items per page: 10 1 - 1 of 1

2.

Project Profile

Project Name	Surveying		
Planned Start Date	07/31/2024	Planned End Date	08/21/2024
Actual Start Date	07/31/2024	Actual End Date	08/21/2024
Planned Duration (Days)	22	Actual Duration (Days)	22
Contracted Amount	\$2,000.00	Total Paid by Customer	\$1,000.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$0.00
Projected Labor Expenses	\$1,000.00	Actual Labor Expenses	\$0.00
Total Overhead Expense	\$400.00	Potential Profit	\$600.00
		Potential Loss	\$0.00
Worksite Address	New York, United States, New York, NY, 45568		
Notes			

Work Force: Dwight Davis, Lucas Brown

Jobs: Surveying

Documents: This project has no documents

Overheads: Insurance 2

Payments: 07/31/2024 \$1,000.00

Project Photos

Customer: John Smith +8566272619

Actual Expenses: Project Overheads 100.0%

3.



The calendar section is made to follow upcoming and current projects; you can easily track projects by month, more in depth by week, and also by day.

- Overview
- Projects
- Calendar** ←
- Customers
- Work Force
- Overheads
- Photos
- Documents
- Reports
- Estimates
- Payments
- Equipment

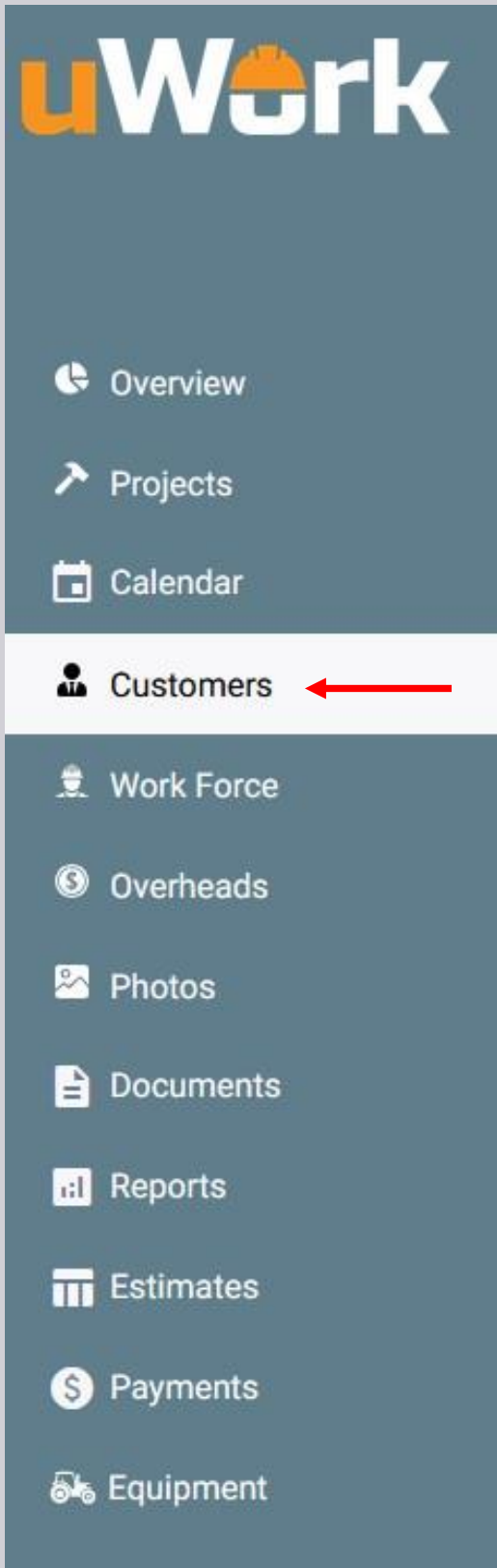
1.

TODAY < > JULY 2024							MONTH	WEEK	DAY
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday			
30	01	02	03	04	05	06			
07	08	09	10	11	12	13			
14	15	16	17	18	19	20			
21	22	23	24	25	26	27			
28	29	30	31	01	02	03			
04	05	06	07	08	09	10			

2.



The customer segment is an important part that lets you create new customers and later add them to your planned projects.



1.

Customer Name	Is Company	Email	Phone	Projects
John Smith	<input type="checkbox"/>	John.Smith@gmail.com	+8566272619	1

2.

Create Project

Project Name *

Customer Name *
John Smith

Planned Start Date *
07/31/2024

Planned End Date *
MM/DD/YYYY

Actual Start Date
MM/DD/YYYY

Actual End Date
MM/DD/YYYY

Contracted Amount *
\$00.00

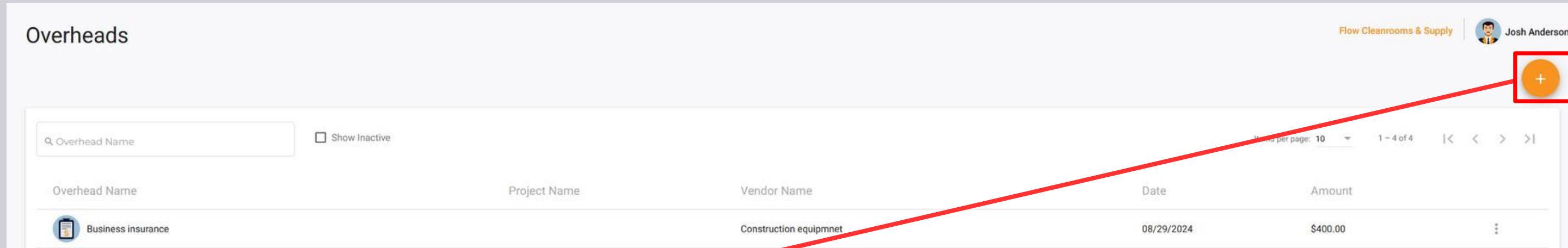
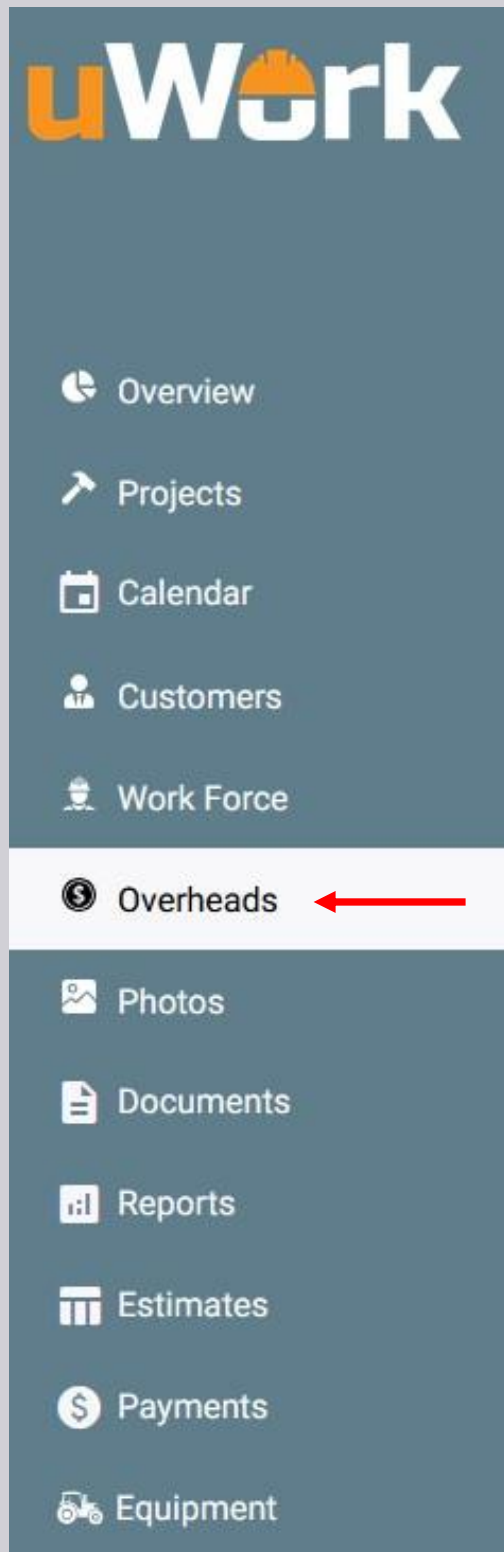
Notes
Text

CREATE

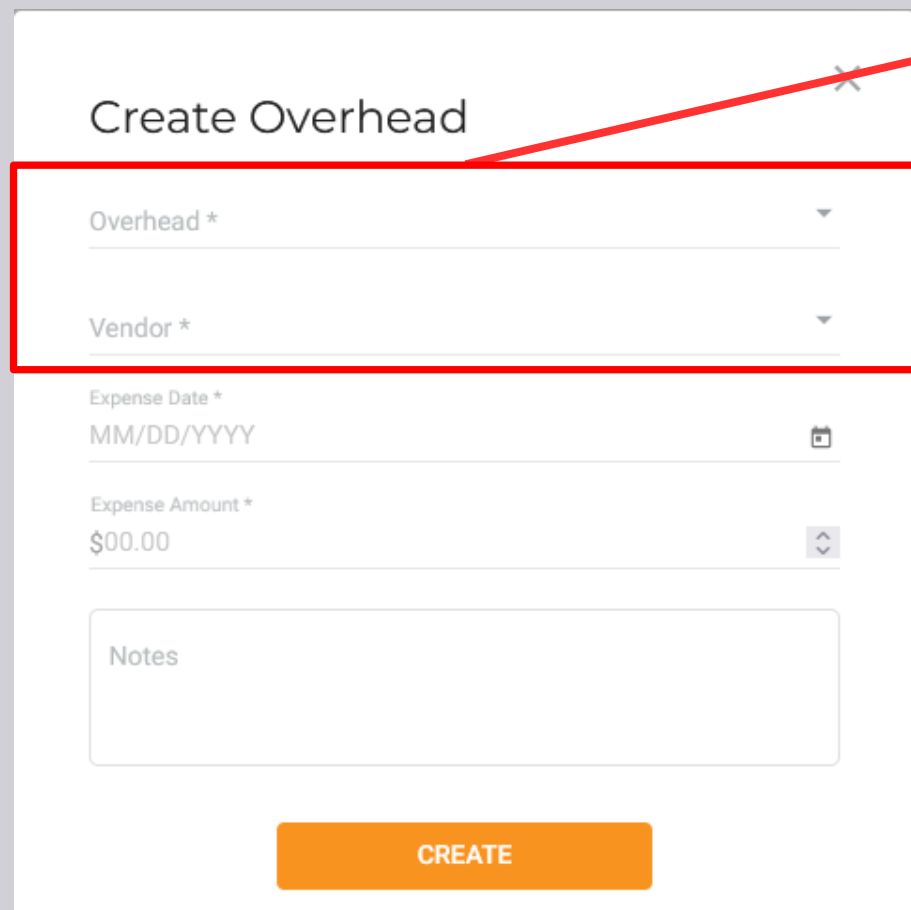
3.



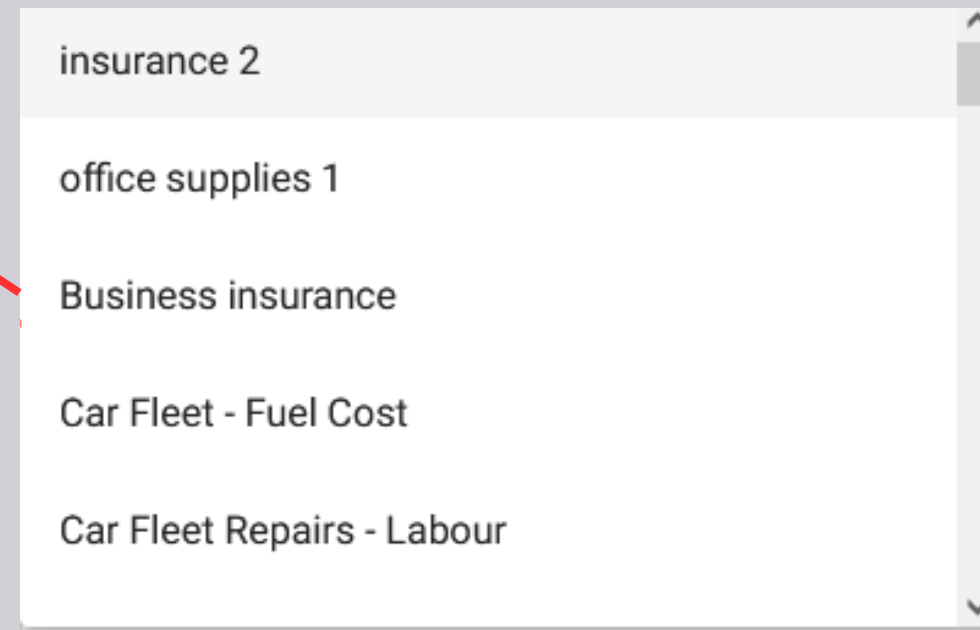
In the overhead section, you can add general overheads. General overheads are expenses that our business pays outside of a certain project (for example, business insurance). This is the case because while creating different projects, you can add overheads to them separately. While creating overhead, you can choose from overheads and vendors that already exist in the application, or you can create them yourself from the "Setup" option.



2.



3.

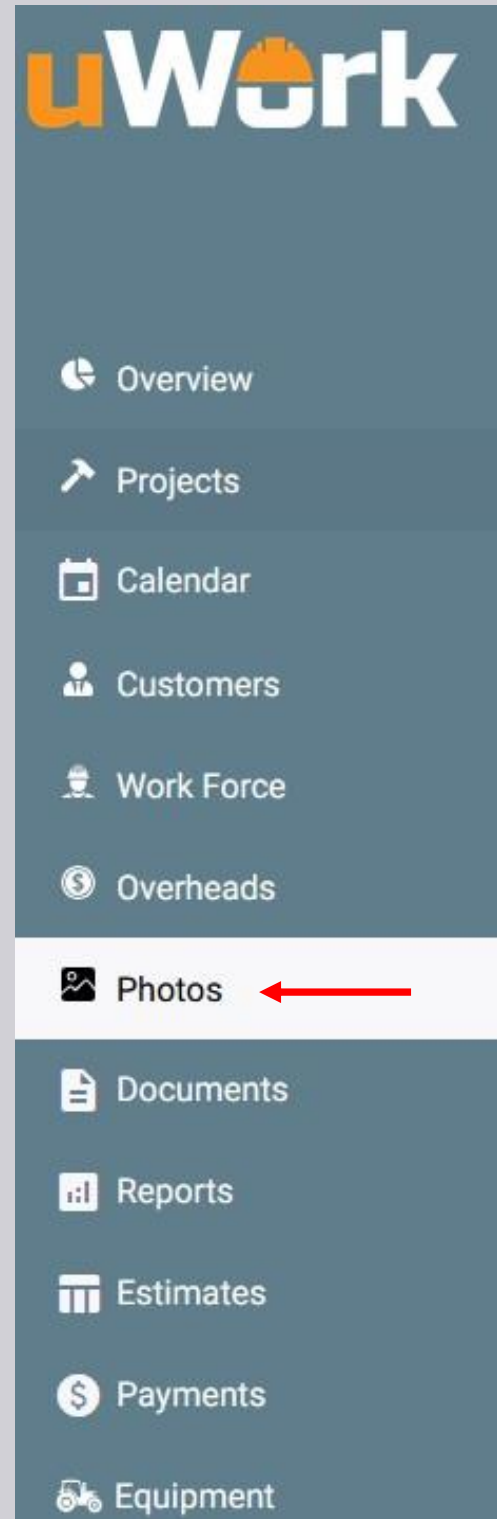


4.

1.



In the photos section, you can add any photo of anything you need: employees, side pictures before and after construction, receipts, equipment, and so on. Tag them, and when you search, for example, "bathroom," you will be able to see all the bathroom pictures you have taken.



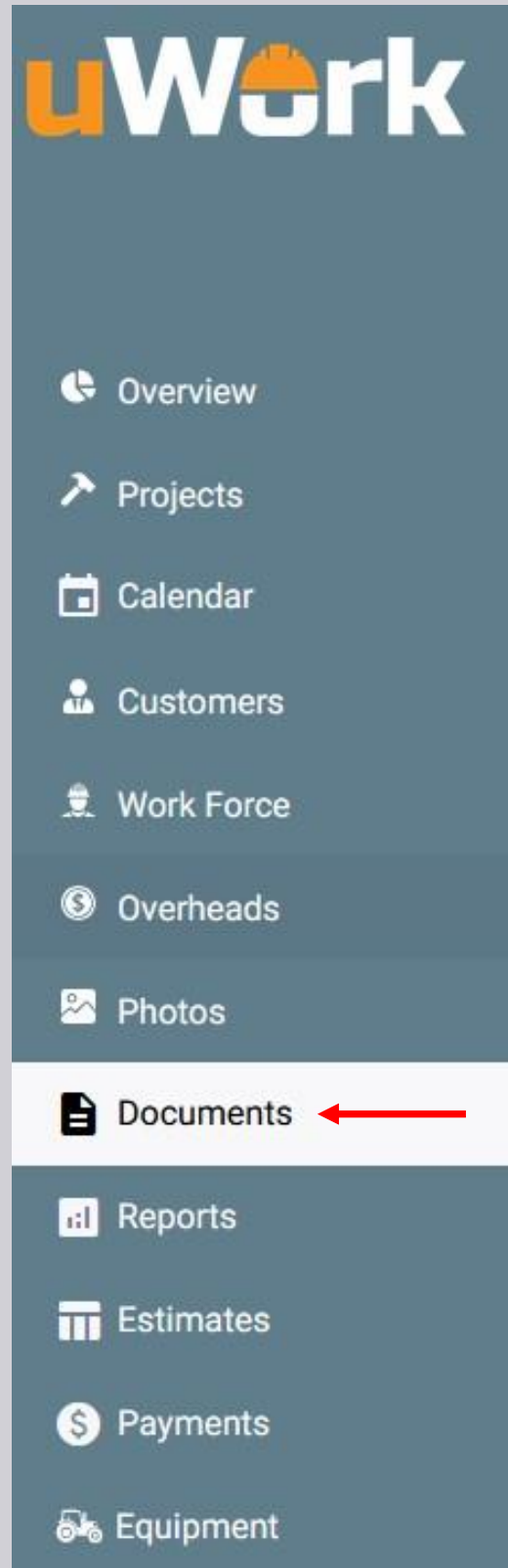
1.



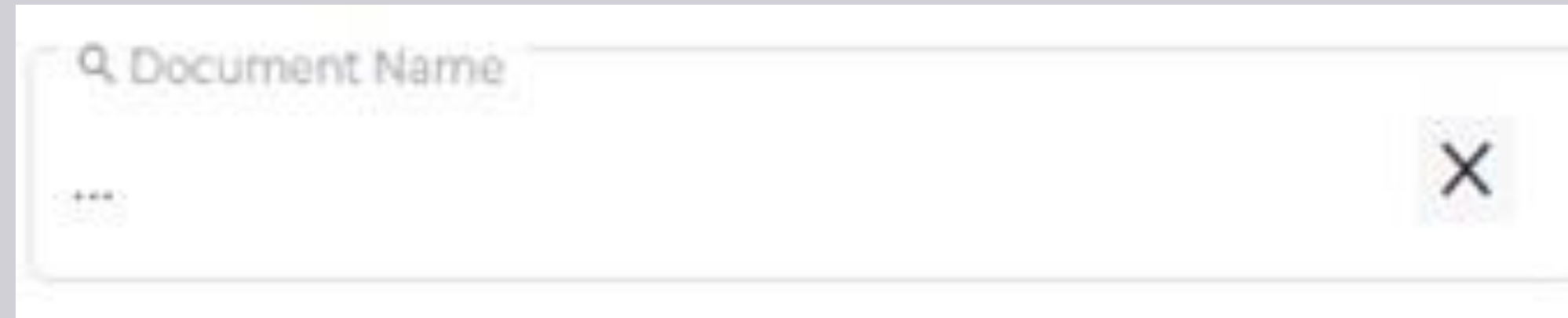
2.



In the Document section, you can save all the documents you are using and have added to your projects, and they will be searchable.



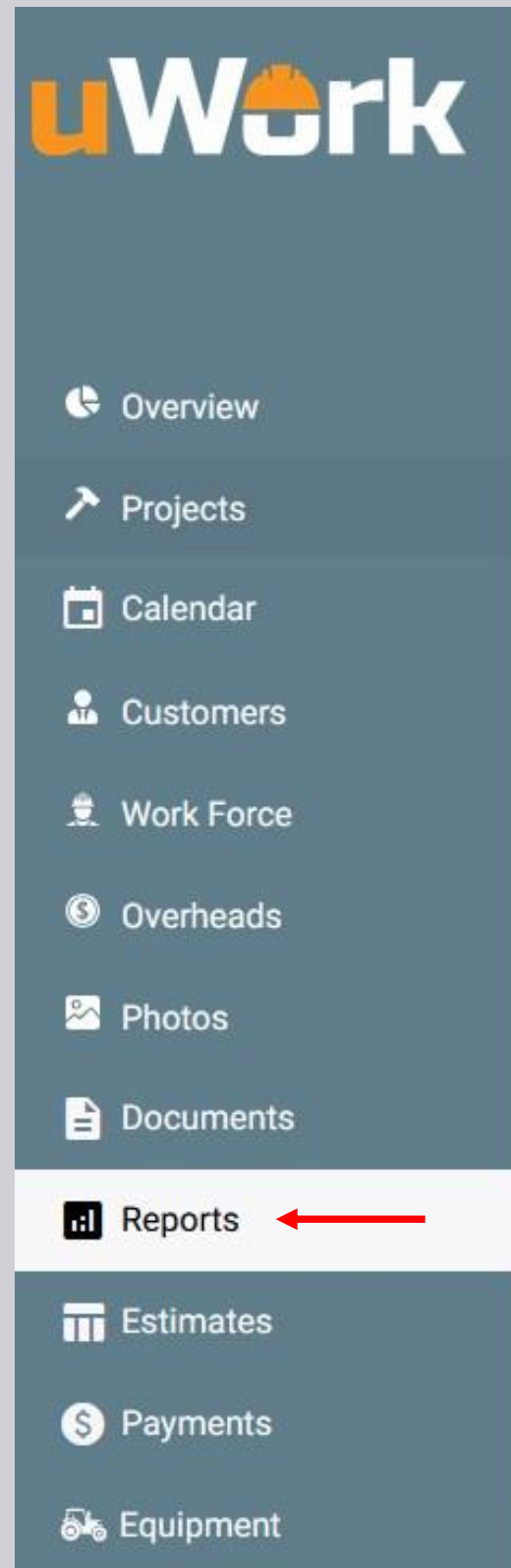
1.



2.



Reports are intuitive and easy to use. In the reports section, you can see sections, for example: Funds Owed to Me (Receivables), Funds I Owe (Payables), Resource Earnings Over Time, and so much more.



1.



2.



The biggest advantage is the estimation part, which will ease up the company's daily work. This can be created as a template for all the following projects and will help you estimate when the work will be finished.

- Overview
- Projects
- Calendar
- Customers
- Work Force
- Overheads
- Photos
- Documents
- Reports
- Estimates**
- Payments
- Equipment

1.

Estimate Name	Created At
Surveying Estimate	07/31/2024

2.

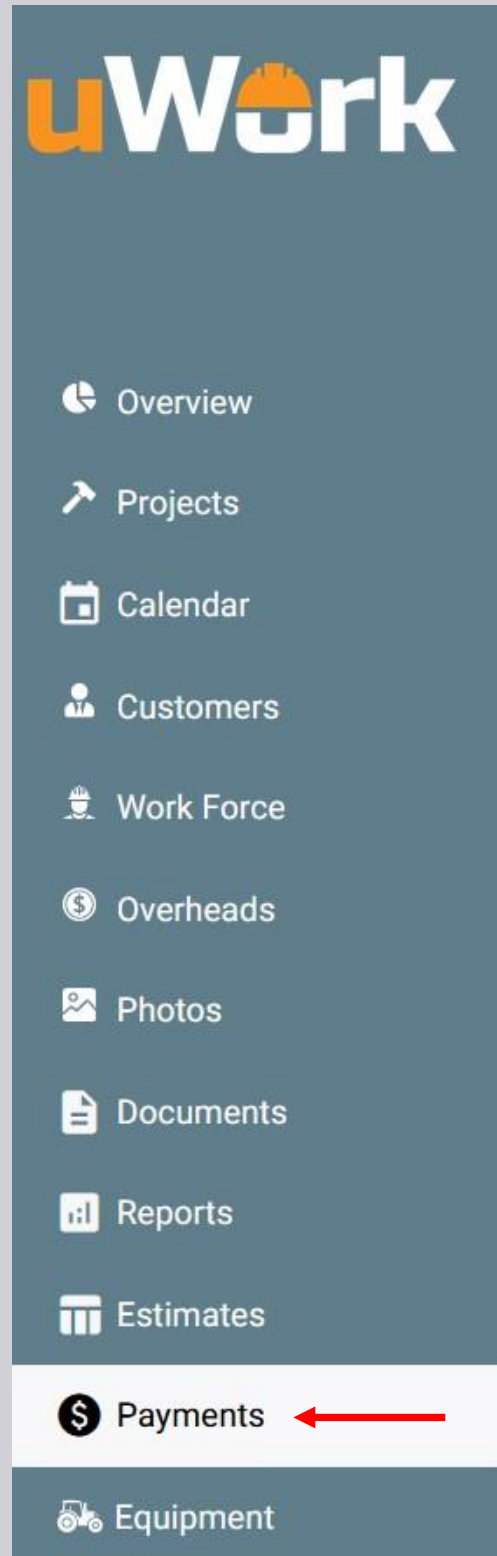
LABOR MARKUP	MATERIAL MARKUP	CONTRACTED	BUDGET	ACTUAL	UNDER/OVER
\$0.00	\$0.00	\$2,000.00	\$0.00	\$0.00	\$0.00

#	Task	Resource/ Contractor	Hrs	Rate	Qty	Cost per Unit	Markup %	Count	Total	Amount	Budget	Actual	Under/Over
---	------	----------------------	-----	------	-----	---------------	----------	-------	-------	--------	--------	--------	------------

3.



In the Payments section, you can find received funds, and you can also make payments. On this page, you can easily track days since the last payment, project end date, owed money, and so on.



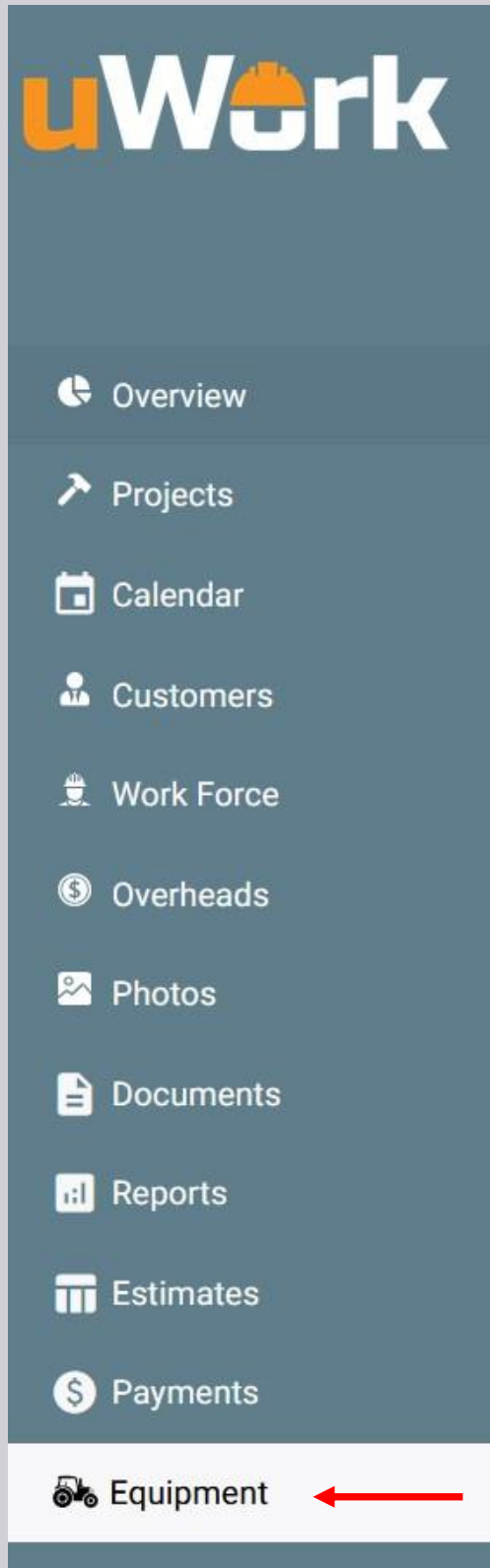
1.

Funds Received		Make Payments			
Project Name	Owed	Days Since Last Payment	Project End Date	Days Since End Date	
John Smith, Owed in Total: \$3,000.00					
Surveying	\$3,000.00	5	Aug 31, 2024	2	\$


2.



In the Equipment section, you can easily see what kind of equipment is rented at the moment, what the model name and type are, and what the rates are for customers. It is a very useful section to see all your company's machinery and equipment at a glance.



1.

Name	Model Name	Item Type	Is Rented	Rate
 Surveying equipment	Ct	Equipment	<input type="checkbox"/>	\$2.00 Per Hour


2.

Item Profile

Item Type	Equipment		
Item Sub-Type	Surveying and measuring equipment		
Name	Surveying equipment		
Model	Ct		
Make	Construction equipmnet		
Rate for Customer	\$2.00 Per Hour		
Manufactured	07/31/2024		
Serial or VIN Number	44455		
Located At	Distribution Centre. NY New York Manhattan 44567		
Is Rented	No		
Year of Service	15 hours		
Purchase Date	07/31/2024	Purchase Price	\$65.00
Miles or Hours at Purchase	4455		

Item Photos

Show All



+

Item Documents

Show All

This Item has no documents

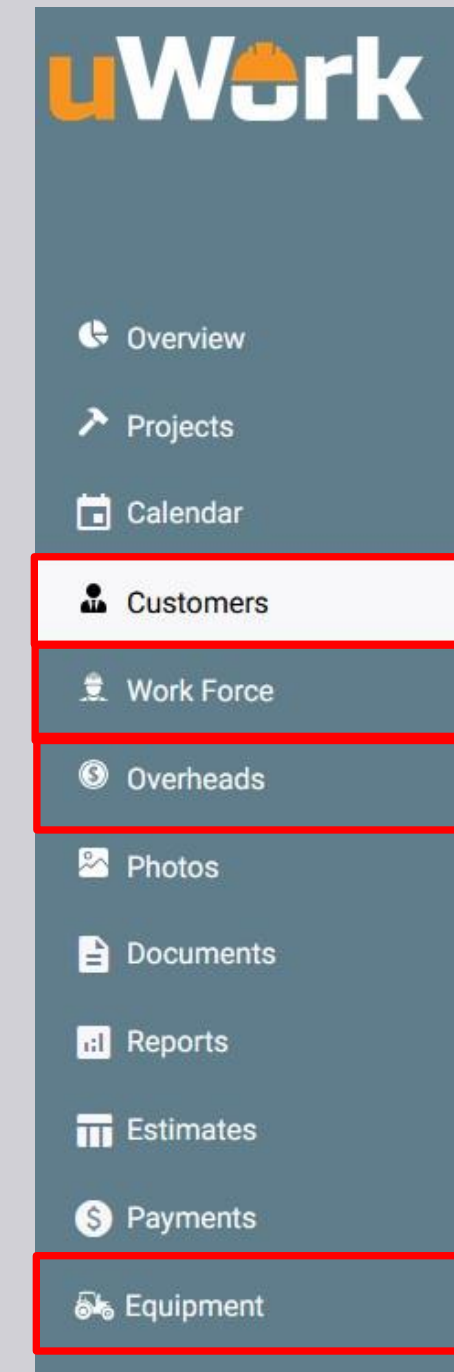
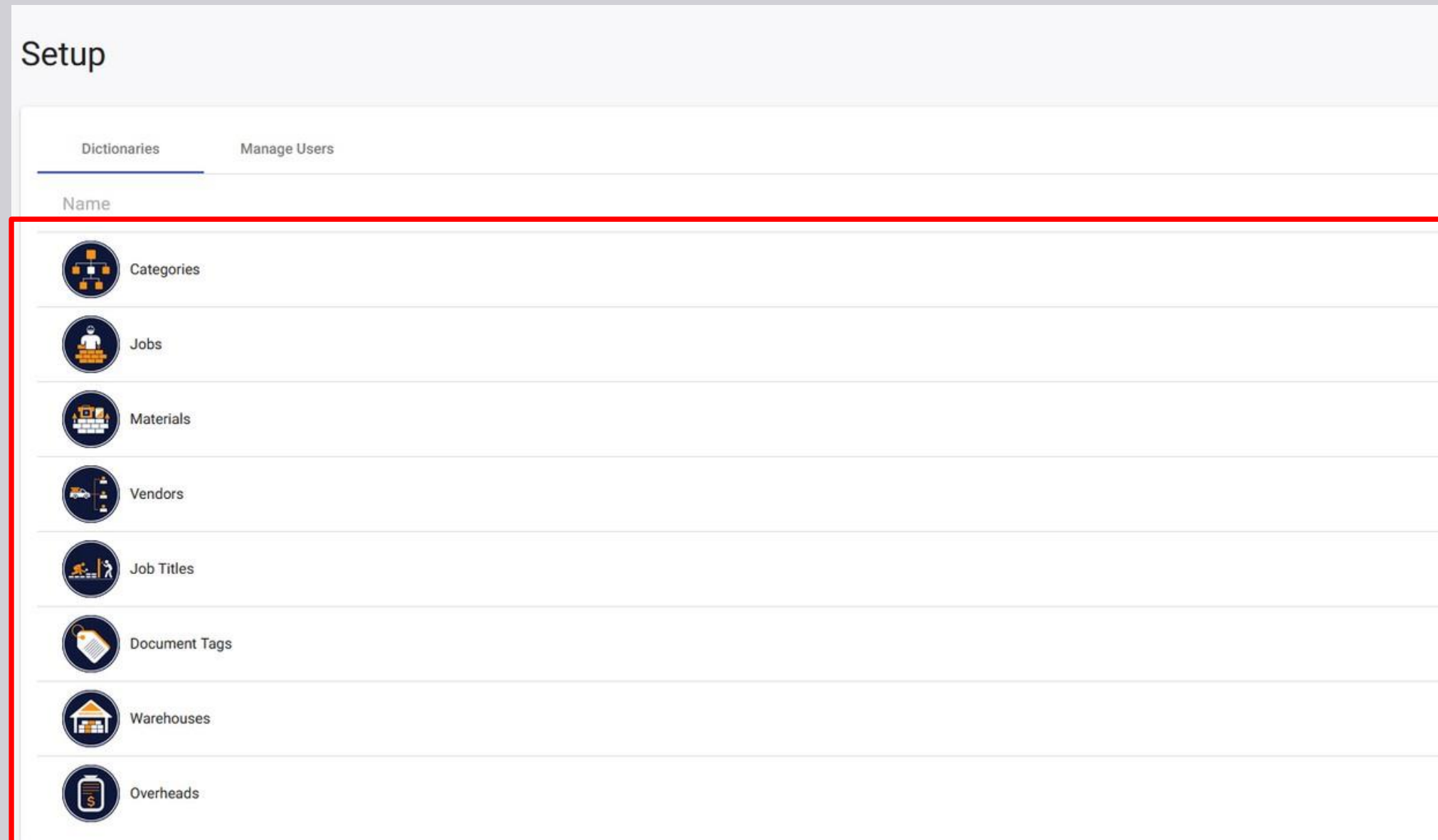
+

3.



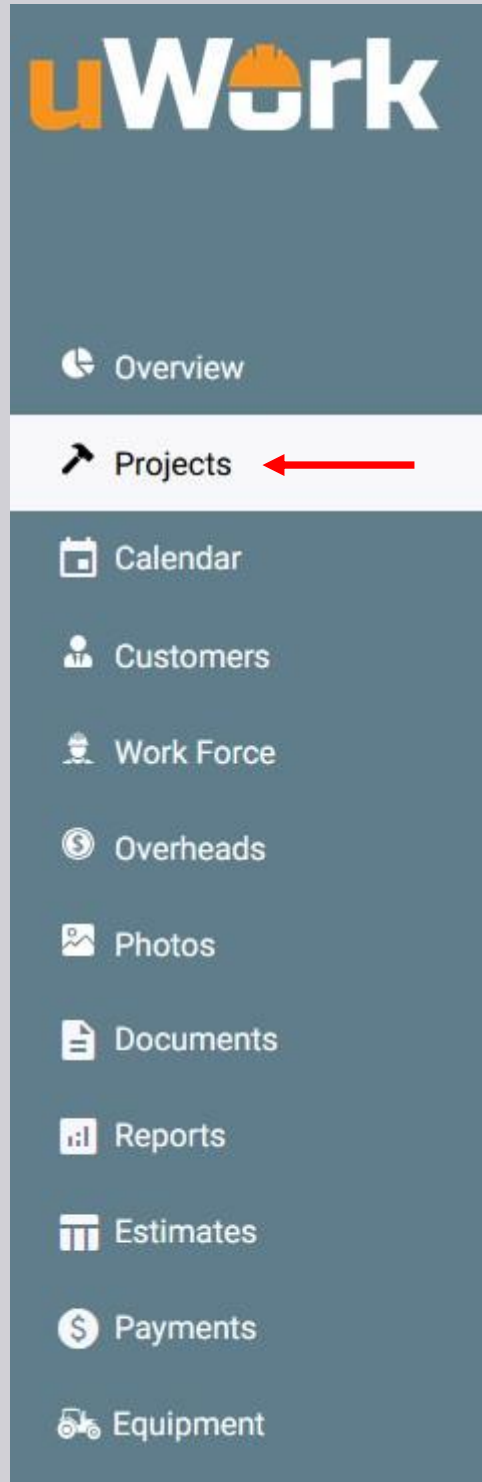
Starting the first project

Before starting your first project, make sure you have completed your setup by adding names to the dictionaries, created the project's customers, work force, general overheads, and added equipment.





To start your first project, go to Projects and press the plus icon. Here you can write the project name, chose customer name that you created before, the project status, the planned date, and how much the contractor is going to pay.



1.

2.

3.



The next step is to press on the project name; here you will see your project's dashboard with all important information. To begin adding information to your project, go to the jobs panel and click the show all button.

Project Name	Customer Name	Date	Contracted Amount	Paid Amount	Status
Surveying	John Smith	08/23/2024	\$7,000.00	\$4,000.00	Planned

← Back
Projects | Surveying

Project Profile

Project Name: Surveying

Planned Start Date	08/23/2024	Planned End Date	08/31/2024
Actual Start Date	08/23/2024	Actual End Date	08/31/2024
Planned Duration (Days)	9	Actual Duration (Days)	9
Contracted Amount	\$7,000.00	Total Paid by Customer	\$4,000.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$700.00
Projected Labor Expenses	\$3,800.00	Actual Labor Expenses	\$480.00
Total Overhead Expense	\$620.00		
Potential Profit	\$2,580.00	Potential Loss	\$0.00
Worksite Address	New York, United States, New York, NY, 45568		
Notes			

Project Photos

Customer: John Smith (+8566272619)

Actual Expenses

Project Overheads:	34.4%
Labor Expenses:	26.7%
Material Expenses:	38.9%

Jobs - 3

Building measurement surveying	In-Progress
Site surveying	In-Progress

Work Force - 3

William Hughes
James Carter

Documents - 1

Surveying map

Overheads - 3

Other Operating Expenses
Travel

Payments - 1

08/27/2024	\$4,000.00
------------	------------

1.

2.



Now we have to create all the jobs that are needed for the project. Click on the plus icon, write job activity, name, chose work force, job status, planned date, and contracted amount. You can also add quantity and cost per unit if needed.

The screenshot displays a web application interface for managing jobs. The main page is titled "Project | Jobs" and includes a navigation bar with "Flow Cleanrooms & Supply" and a user profile for "Josh Anderson". A "Back" button and breadcrumb "Projects | Surveying | Jobs" are visible. The main content area shows a list of jobs with columns for "Job Name", "Work Force", "Date", and "Contracted Amount". A "Create Job" modal form is open, containing the following fields:

- Activity *
- Job Name *
- Work Force * (Search for a Resource)
- Job Status *
- Planned Start Date * (08/08/2024) and Planned End Date * (MM/DD/YYYY)
- Actual Start Date (MM/DD/YYYY) and Actual End Date (MM/DD/YYYY)
- Contracted Amount * (\$00.00)
- Quantity (00.00) and UOM (UOM)
- Cost per Unit (\$00.00)
- Notes (Text input)

A red box highlights a plus icon in the top right corner of the main page, and a red line connects it to the "Create Job" modal. The number "1." is placed to the right of the plus icon, and the number "2." is placed to the right of the modal.






For this particular surveying project, we have added 3 different workers. Here we can see when the workers will begin their work (1), how much will the workers get paid for the contract (2), what is the current paid amount for the workers (3), and what materials are being used that will add to the overall expenses (4). You can also see project status, which you can change by editing different job segments (5).

← Back
Projects | Surveying | Jobs

All Jobs Planned In Progress Completed Cancelled

🔍 Job Name Show Inactive




Items per page: 10 1 - 3 of 3

Job Name	Work Force	Date	Contracted Amount	Paid Amount	Materials	Status
 Building measurement surveying	Dwight Davis	08/23/2024	\$1,100.00	\$0.00	0	In-Progress
 Site surveying	James Carter	08/23/2024	\$1,200.00	\$0.00	0	In-Progress
 Engineering activities	William Hughes	08/23/2024	\$1,500.00	\$0.00	1	In-Progress

1. 2. 3. 4. 5.



You can always edit your project jobs by clicking three dots and pressing edit. Here you will be prompted with the same job window, in which you can also change job status.

Job Name	Work Force	Date	Contracted Amount	Paid Amount	Materials	Status
 Building measurement surveying	Dwight Davis	08/23/2024	\$1,100.00	\$0.00	0	In-Progress
 Site surveying	James Carter	08/23/2024	\$1,200.00	\$0.00	0	In-Progress
 Engineering activities	William Hughes	08/23/2024	\$1,500.00	\$0.00	1	In-Progress

1.

Edit Job

Activity *
Site surveying

Job Name *
Site surveying

Work Force *
James Carter (Land surveyor (G))

Search for a Resource

Job Status *
In Progress

Planned Start Date *
08/23/2024

Planned End Date *
08/23/2024

Actual Start Date
08/31/2024

Actual End Date
08/30/2024

Contracted Amount *
\$1200

Quantity
5

UOM
ha

Cost per Unit
\$240

Notes
Text

CANCEL SAVE

3.

Edit

Delete

2.

Planned

In Progress

Completed

Cancelled

4.



By clicking on a particular job (in this example, "site surveying"), we can see the designated job profile with all essential information. Let's first edit how we shall measure the job's progress.

Job Name	Work Force	Date	Contracted Amount	Paid Amount	Materials	Status
Building measurement surveying	Dwight Davis	08/23/2024	\$1,100.00	\$0.00	0	In-Progress
Site surveying	James Carter	08/23/2024	\$1,200.00	\$0.00	0	In-Progress
Engineering activities	William Hughes	08/23/2024	\$1,500.00	\$0.00	1	In-Progress

1.

← Back
Projects | Surveying | Jobs | Site surveying

Job Profile

In Progress

Job Name	Site surveying		
Activity	Site surveying		
Planned Start Date	08/23/2024	Planned End Date	08/23/2024
Actual Start Date	08/31/2024	Actual End Date	08/31/2024
Planned Duration Days	1	Actual Duration Days	1
Contracted Amount	\$1,200.00	Paid Amount	\$0.00
Quantity	0	Cost per Unit	\$0.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$0.00
Balance	\$1,200.00		
Notes			

Job Photos

[Show All](#)

Work Force

[Show All](#)

James Carter (Land surveyor (G))

Overall Job Progress

Actual
Left

Payments

[Show All](#)

This job has no payments

Materials

[Show All](#)

This job has no materials


2.



Begin by pressing on the pen icon. In the edit job window, let's choose units of measurement, in this case, hectares, then specify quantity and cost per unit.

← Back
Projects | Surveying | Jobs | Site surveying

Job Profile

In Progress 

Job Name	Site surveying		
Activity	Site surveying		
Planned Start Date	08/23/2024	Planned End Date	08/23/2024
Actual Start Date	08/31/2024	Actual End Date	08/31/2024
Planned Duration Days	1	Actual Duration Days	1
Contracted Amount	\$1,200.00	Paid Amount	\$0.00
Quantity	0	Cost per Unit	\$0.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$0.00
Balance	\$1,200.00		
Notes			

1.

Edit Job

Activity*
Site surveying

Job Name*
Site surveying

Work Force*
James Carter (Land surveyor (G))

Search for a Resource

Job Status*
In Progress

Planned Start Date*
08/23/2024

Planned End Date*
08/23/2024

Actual Start Date
08/31/2024

Actual End Date
08/31/2024

Contracted Amount*
\$1200

Quantity
5

UOM
ha

Cost per Unit
\$240

Notes
Text

CANCEL SAVE

2.



Now we are able to see overall job progress and have an option to change what part of the job is currently being done by choosing the worker's name and dragging the bar to the right side. Also, the work being accomplished can be reported by the workers themselves with the uWork mobile app which will be shown in the same progress bar below.



1.

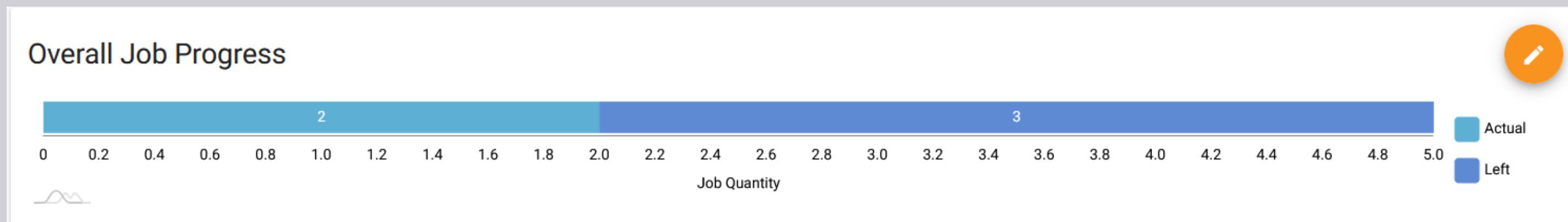
Edit Job Progress

Resource Name *
James Carter

Quantity

CANCEL SAVE

2.



3.



Now as we see our workers progress we can add how much we have paid for the currently accomplished job. To add how much we have paid our workers press on the payments, show all button.

← Back
Projects | Surveying | Jobs | Site surveying

Job Profile In Progress

Job Name	Site surveying		
Activity	Site surveying		
Planned Start Date	08/23/2024	Planned End Date	08/23/2024
Actual Start Date	08/31/2024	Actual End Date	08/30/2024
Planned Duration Days	1	Actual Duration Days	1
Contracted Amount	\$1,200.00	Paid Amount	\$0.00
Quantity	5 ha	Cost per Unit	\$240.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$0.00
Balance	\$1,200.00		
Notes			

Job Photos Show All

Work Force Show All

James Carter (Land surveyor (G))

Overall Job Progress

0	0.2	0.4	0.6	0.8	1.0	1.2	1.4	1.6	1.8	2.0	2.2	2.4	2.6	2.8	3.0	3.2	3.4	3.6	3.8	4.0	4.2	4.4	4.6	4.8	5.0
---	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----	-----

Actual Left

Payments Show All

This job has no payments

Materials Show All

This job has no materials



Here, by pressing the plus icon, we can create payment. First choose your worker, then specify which date the payment was made and the payment amount.

The screenshot displays a web application interface for managing payments. At the top right, a red square highlights a plus icon (+) in an orange circle, which is used to create a new payment. Below this, a breadcrumb trail reads: ← Back | Projects | Surveying | Jobs | Site surveying | Payments. A summary bar shows 'Contracted Amount: \$1,200.00' and pagination controls: 'Items per page: 10', '0 of 0', and navigation arrows. Below the summary is a table header with columns: 'Resource Name', 'Date ↑', 'Paid Amount', and 'Remaining Balance'. A modal window titled 'Create Payment' is open in the foreground. It contains a dropdown menu for 'Select a Resource *' with 'James Carter' selected. Below that are two input fields: 'Payment Date *' with the value '08/26/2024' and a calendar icon, and 'Payment Amount *' with the value '\$ 480' and a spinner icon. At the bottom of the modal is a large orange button labeled 'CREATE'.



Now when we go to the job profile where we can see the amount we have paid and what balance is left out of contracted amount.

Job Profile				In Progress	
Job Name	Site surveying				
Activity	Site surveying				
Planned Start Date	08/23/2024	Planned End Date	08/23/2024		
Actual Start Date	08/31/2024	Actual End Date	08/30/2024		
Planned Duration Days	1	Actual Duration Days	1		
Contracted Amount	\$1,200.00	Paid Amount	\$480.00		
Quantity	5 ha	Cost per Unit	\$240.00		
Projected Material Expenses	\$0.00	Actual Material Expenses	\$0.00		
Balance	\$720.00				
Notes					



Another important factor that might impact our expenses are materials that we are going to purchase for this project. To add materials, navigate to the materials section and press the show all button.

← Back
Projects | Surveying | Jobs | Site surveying

Job Profile In Progress

Job Name	Site surveying		
Activity	Site surveying		
Planned Start Date	08/23/2024	Planned End Date	08/23/2024
Actual Start Date	08/31/2024	Actual End Date	08/30/2024
Planned Duration Days	1	Actual Duration Days	1
Contracted Amount	\$1,200.00	Paid Amount	\$480.00
Quantity	5 ha	Cost per Unit	\$240.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$0.00
Balance	\$720.00		
Notes			

Job Photos Show All

Work Force Show All

James Carter (Land surveyor (G))

Overall Job Progress

Actual	2
Left	3

Payments Show All

\$	08/26/2024	\$480.00
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Materials Show All

This job has no materials



Here we can add them by pressing the plus icon. In the new window, select material, vendor from which you are going to purchase the materials, date, quantity, and expense amount.

← Back
Projects | Surveying | Jobs | Site surveying | Materials

Q Material Name Show Inactive

Items per page: 10 0 of 0 |< < > >|

Material Name

Create Job Material ×

Material *
surveying equipment

Vendor
Construction equipmnet

Expense Date * 08/26/2024 Quantity * 2

Expense Amount * \$ 700

Notes

CREATE

Amount



Now let's go back to our main project profile by clicking on our project name. Another important thing to add to our project are documents, overheads, and payments. To add new documents, click on the show all button in the document section.

2.

1.

← Back
Projects | Surveying | Jobs | Site surveying

Job Profile

In Progress

Job Name	Site surveying		
Activity	Site surveying		
Planned Start Date	08/23/2024	Planned End Date	08/23/2024
Actual Start Date	08/31/2024	Actual End Date	08/30/2024
Planned Duration Days	1	Actual Duration Days	1
Contracted Amount	\$1,200.00	Paid Amount	\$480.00
Quantity	5 ha	Cost per Unit	\$240.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$700.00
Balance	\$720.00		
Notes			

← Back
Projects | Surveying

Project Profile

Planned

Project Name	Surveying		
Planned Start Date	08/23/2024	Planned End Date	08/31/2024
Actual Start Date	08/23/2024	Actual End Date	08/31/2024
Planned Duration (Days)	9	Actual Duration (Days)	9
Contracted Amount	\$7,000.00	Total Paid by Customer	\$4,000.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$700.00
Projected Labor Expenses	\$3,800.00	Actual Labor Expenses	\$480.00
Total Overhead Expense	\$620.00		
Potential Profit	\$2,580.00	Potential Loss	\$0.00
Worksite Address	New York, United States, New York, NY, 45568		
Notes			

Work Force - 3

William Hughes

James Carter

Show All

Jobs - 3

Building measurement surveying

Site surveying

Show All

Documents - 1

Surveying map

Show All

Overheads - 3

Other Operating Expenses

Travel

Show All

Payments - 1

08/27/2024 \$4,000.00

Show All

Project Photos

Show All

Customer

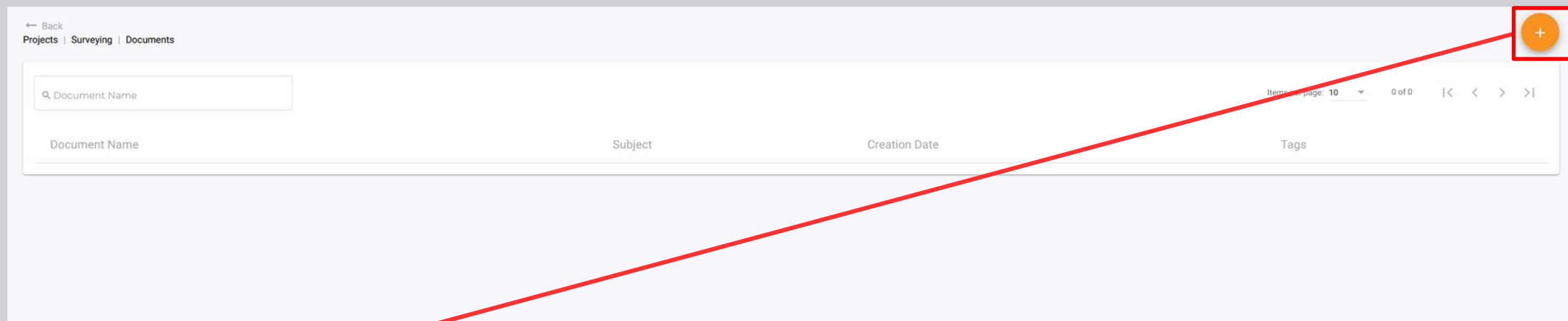
John Smith +8566272619

Actual Expenses

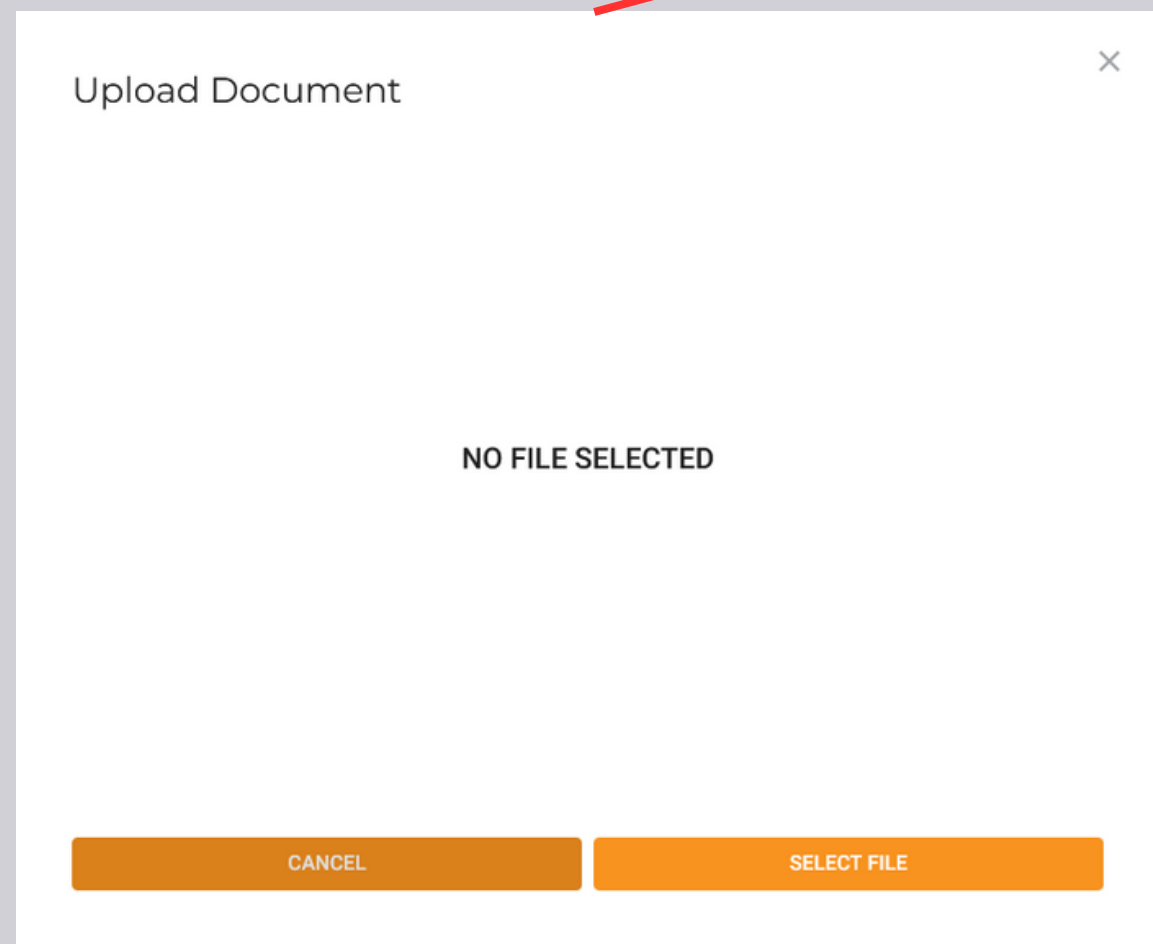
Project Overheads: 34.4%	Labor Expenses: 26.7%	Material Expenses: 38.9%
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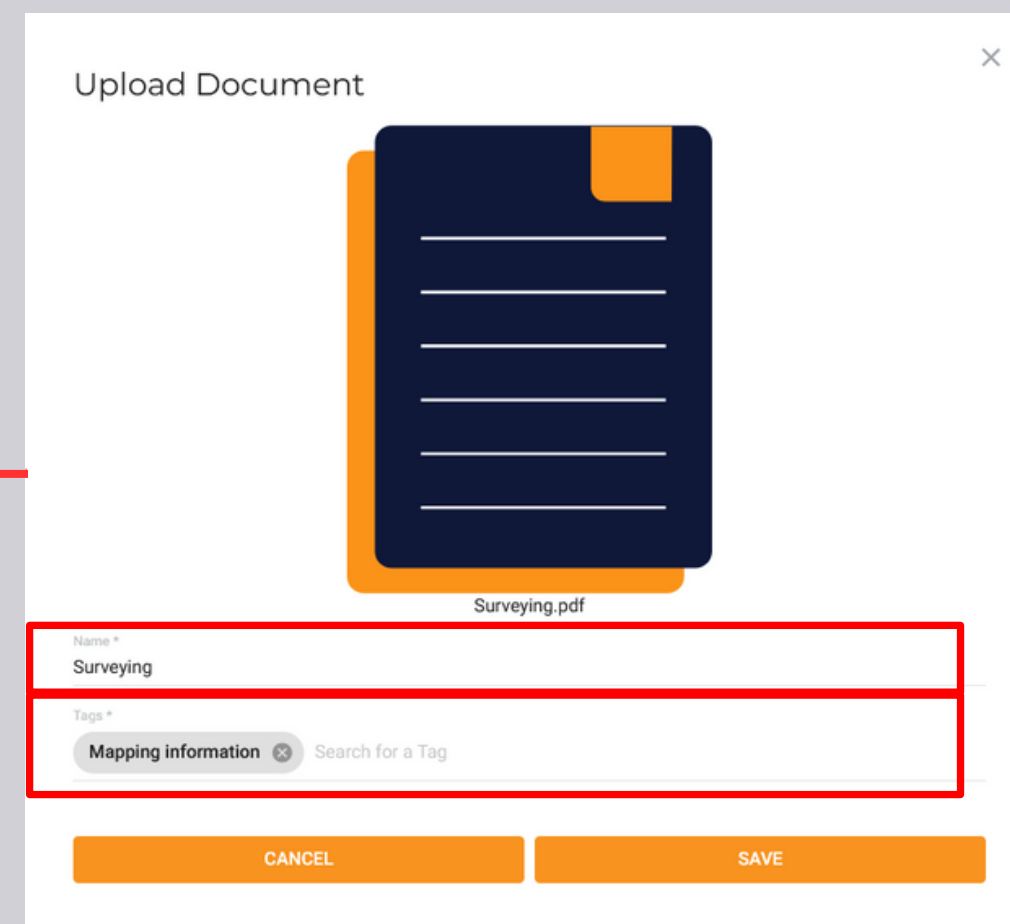
By clicking the plus icon, we can add a new document from our device. In this case, we added a surveying document by naming it and putting on a tag that will let us find the document easier later on.



1.



2.



3.



Now let's go back to the project profile and add overheads that have an impact on the overall project expenses. Go to the overheads section and press the show all button.

← Back
Projects | Surveying

Project Profile

Planned

Project Name	Surveying		
Planned Start Date	08/23/2024	Planned End Date	08/31/2024
Actual Start Date	08/23/2024	Actual End Date	08/31/2024
Planned Duration (Days)	9	Actual Duration (Days)	9
Contracted Amount	\$7,000.00	Total Paid by Customer	\$4,000.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$700.00
Projected Labor Expenses	\$3,800.00	Actual Labor Expenses	\$480.00
Total Overhead Expense	\$620.00		
Potential Profit	\$2,580.00	Potential Loss	\$0.00
Worksite Address	New York , United States , New York , NY , 45568		
Notes			

Project Photos

Show All

Customer

John Smith +8566272619

Actual Expenses

Project Overheads	34.4%
Labor Expenses	26.7%
Material Expenses	38.9%

Work Force - 3

Show All

- William Hughes
- James Carter

Jobs - 3

Show All

- Building measurement surveying (In-Progress)
- Site surveying (In-Progress)

Documents - 1

Show All

- Surveying map

Overheads - 3

Show All

- Other Operating Expenses
- Travel

Payments - 1

Show All

08/27/2024	\$4,000.00
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To add overheads, press the plus icon. In the new window, let's select overhead (in this case, it will be insurance), then vendor, which provides the service, date when it was purchased, and expense amount.

The screenshot displays a software interface for managing overheads. At the top left, there is a navigation breadcrumb: "← Back Projects | Surveying | Overheads". Below this is a search bar labeled "Overhead Name" and a checkbox for "Show Inactive". On the right side of the interface, there is a table with a header "Amount" and a pagination control showing "Items per page: 10" and "0 of 0". A red box highlights a plus icon (+) in the top right corner of the table area, with a red arrow pointing to the "Create Overhead" modal form.

The "Create Overhead" modal form contains the following fields:

- Overhead ***: Insurance
- Vendor ***: New York Life Insurance Company
- Expense Date ***: 08/26/2024
- Expense Amount ***: \$500
- Notes**: (Empty text area)
- CREATE**: (Orange button)



Going back to the project profile, we can see a chart with our projects actual labor, material, and overhead expenses (1). The last thing for us to do now is to add payments. They will show how much our client has paid us out of the contracted amount (2).

← Back
Projects | Surveying

Project Profile

Planned

Project Name	Surveying		
Planned Start Date	08/23/2024	Planned End Date	08/31/2024
Actual Start Date	08/23/2024	Actual End Date	08/31/2024
Planned Duration (Days)	9	Actual Duration (Days)	9
Contracted Amount	\$7,000.00	Total Paid by Customer	\$4,000.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$700.00
Projected Labor Expenses	\$3,800.00	Actual Labor Expenses	\$480.00
Total Overhead Expense	\$620.00		
Potential Profit	\$2,580.00	Potential Loss	\$0.00
Worksite Address	New York , United States , New York , NY , 45568		
Notes			

Project Photos

Show All

Customer

John Smith +8566272619

Actual Expenses

1.

Category	Percentage
Project Overheads	34.4%
Labor Expenses	26.7%
Material Expenses	38.9%

Work Force - 3

Show All

- William Hughes
- James Carter

Jobs - 3

Show All

- Building measurement surveying (In-Progress)
- Site surveying (In-Progress)

Documents - 1

Show All

- Surveying map

Overheads - 3

Show All

- Other Operating Expenses
- Travel

Payments - 1

Show All

Date	Amount
08/27/2024	\$4,000.00

2.



To create new payment press on the plus icon. In a new window write a date when the payment was made and the paid amount.

← Back
Projects | Surveying | Payments

Contracted Amount: \$7,000.00

Items per page: 10 0 of 0 |< < > >|

Date	Paid Amount	Remaining Balance
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Create Payment

Payment Date * 08/27/2024

Payment Amount * \$ 4000

CREATE



We have completely all the necessary steps for a successful project! It is important to note that project information can be changed at any given time by the web application or the mobile app. Via the mobile app, the work force of the project can add materials that they purchase, write notes, indicate their work progress, and check in time.

Project Profile

Planned

Project Name	Surveying		
Planned Start Date	08/23/2024	Planned End Date	08/31/2024
Actual Start Date	08/23/2024	Actual End Date	08/31/2024
Planned Duration (Days)	9	Actual Duration (Days)	9
Contracted Amount	\$7,000.00	Total Paid by Customer	\$4,000.00
Projected Material Expenses	\$0.00	Actual Material Expenses	\$700.00
Projected Labor Expenses	\$3,800.00	Actual Labor Expenses	\$480.00
Total Overhead Expense	\$620.00		
Potential Profit	\$2,580.00	Potential Loss	\$0.00
Worksite Address	New York , United States , New York , NY , 45568		
Notes			

Work Force - 3

William Hughes
James Carter

Jobs - 3

Building measurement surveying (In-Progress)
Site surveying (In-Progress)

Documents - 1

Surveying map

Overheads - 3

Other Operating Expenses
Travel

Payments - 1

08/27/2024 \$4,000.00

Project Photos

Show All

Customer

John Smith +8566272619

Actual Expenses

Project Overheads:	34.4%
Labor Expenses:	26.7%
Material Expenses:	38.9%

Payments - 1

08/27/2024 \$4,000.00



To view more information about our projects, work force, and financials, you can go to the reports option and click on one of the report names.

