Job Pulse User Manual

Version 1.0 — November 2026

Job Pulse is a job, cost, and billing workspace for trade contractors. It follows a job from setup through costs, change orders, and pay applications, all the way to cash received and collections — so the office, the project managers, and ownership are always looking at the same numbers.

This manual explains every part of the app in the order you will normally use it. If you are new, start with the page below — it is the whole system on one page. The chapters after it fill in the details.

Your first month in Job Pulse

Work through these steps in order. Each one points to the chapter that explains it fully.

1. **Settings → Time & Materials Pricing**: enter your labor rate and markups (only if you do time & materials work). → Chapter 16
2. **Jobs → New Job**: enter the contract, customer, and scopes. ⚠ Pick cost tracking carefully — it locks with your first cost entry. → Chapter 6
3. **Billing & A/R → set up the Schedule of Values (SOV)**: the line items your customer sees on each pay app. The lines must add up exactly to the contract. → Chapter 7
4. **Each week**: record costs and update percent complete, both on the job's **Cost tracking** tab. → Chapters 8 and 9
5. **End of month**: **Create SOV application** → check the preview → issue it → download the PDF → send it to the customer. → Chapters 11 and 12
6. **Same day**: **Record sent date**. Now it is money owed to you, and it starts aging. → Chapter 12
7. **When the check comes**: **Cash receipts** → record it → apply it to the pay app. → Chapter 13

The worked example. One made-up company runs through this whole manual: **Demo Electric Co.**, and its job **D-101, the Riverside Clinic Fit-out** — a $100,000 contract with a customer called Sample Builders LLC. The contract breaks into three lines: Rough-in $40,000, Trim $25,000, Switchgear $35,000, with 5% retainage. A $10,000 change order shows up along the way. Whenever a chapter uses real numbers, they are D-101's numbers, so you can follow the same job from setup to final payment.

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1. How Job Pulse is organized

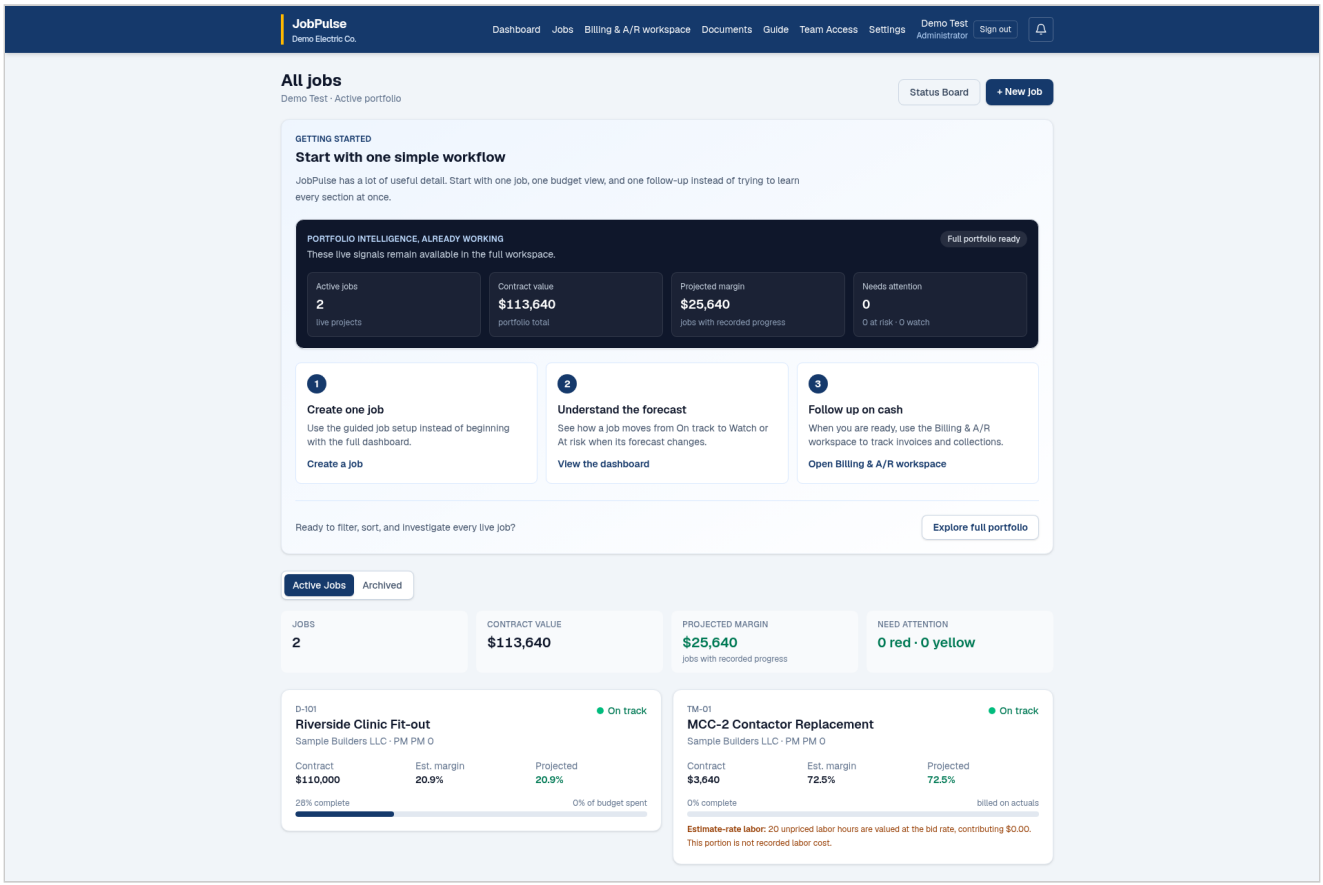
Everything in Job Pulse belongs to one **company**. When you sign in, you land in your own company's workspace — your jobs, your customers, your money. You never see another company's data, and they never see yours.

As the owner, you are an **Administrator**: you see everything in your company, and you can add people. (Chapter 4 explains the roles; the appendix has the full table.)

The main menu gives you:

- **Dashboard** — your starting view. Project managers see their own jobs ("My jobs"); administrators see the company picture.
- **Jobs** — the job list, and where you open a job to work on it.
- **Billing & A/R** — pay applications, billing in progress, cash receipts, and collections (appears when billing is turned on for your company). "A/R" is accounts receivable: money customers owe you.
- **Documents** — the company document library.
- **Team Access** — managing the people in your company (administrators).
- **Guide** — built-in guidance inside the app.

- **Reports** — the company's reporting page: billing, cash, receivables aging, and job performance, with spreadsheet exports (appears for administrators, and anyone with report permission, when billing is turned on for your company). → Chapter 19
- **Settings** — your account details, your password, and company settings such as the time & materials rates.



The Jobs home page. The main menu runs across the top: Dashboard, Jobs, Billing & A/R workspace, Documents, Guide, Reports, Team Access, Settings. In this demo portfolio, contract value totals $113,640 and projected margin totals $25,640, with both jobs On track. Reports is covered in Chapter 19.

If a menu item is missing, it means your role does not include it, or the feature is not turned on for your company. It is not a fault — ask an administrator.

One account, one company. Your email address belongs to exactly one company in Job Pulse. If you work with more than one company, you will have a separate account for each.

What Job Pulse doesn't do yet

A short, honest list, so nothing surprises you in the first month:

- **No daily logs.** Job Pulse tracks costs and percent complete; it does not keep daily field reports.
- **No crew or overtime fields.** Labor is recorded as hours and dollars per entry — there are no crew lists, and no separate overtime or premium-time fields.
- **Materials are dollars only.** You record what materials cost, not quantities or units.
- **No QuickBooks or payroll link.** Figures do not flow to or from QuickBooks, and Job Pulse does not connect to a payroll system. Labor cost is what you type in.
- **No import for a job that is already partway through billing.** A job's earlier pay applications, from before you started with Job Pulse, cannot be brought in. Job Pulse's billing history for a job starts with the first pay application you create here.

2. Getting your account and signing in

Your setup link

You do not create your own account. When your company is set up, or when an administrator adds you, **Job Pulse emails you a setup link**. Clicking it opens a page where you set your own password — nobody else ever knows it.

- The link works **once**. After you set your password, it cannot be used again.
- Setup links stay valid for **7 days**. If yours expires before you use it, ask your administrator to send a fresh one — they can do that in a few clicks (see Team Access).
- Set a password of **12 to 256 characters**, and enter it twice to confirm.
- After setting your password you are taken to the sign-in page. Sign in with your email and the password you just chose.

Treat the setup link like a key: it is meant only for you. Do not forward it.

Signing in

1. Go to the Job Pulse sign-in page.
2. Enter your email address and password.
3. You land in your company's workspace, on the Dashboard.

The sign-in page looks the same for everyone: a **JP** tile, the name **JobPulse**, and the line "Job tracking, billing & profitability." It never shows your company's name — or anyone else's. If a sign-in page ever asks for anything beyond your email and password, stop and check the address.

Changing your own password

In **Settings** you can change your password at any time: enter your current password, then a new one (12–256 characters) and confirm it. Changing your password signs out **every** session, including the one you are in — you will be asked to sign in again with the new password.

3. If you forget your password

You do not need anyone's help to get back in — you can reset it yourself.

1. On the sign-in page, choose **Forgot password**.
2. Enter the email address on your account and submit.
3. Job Pulse emails you a private reset link. For security, the page always shows the same message — "If an account exists for that email address, a password link is on its way to that inbox" — whether or not the address matches an account. Check your inbox (and spam folder) for the email.
4. Open the link and set a new password (12–256 characters, entered twice).
5. Sign in with your new password.

Reset links are short-lived — **valid for 30 minutes** — and work once. You can request a reset link up to **3 times an hour**. If yours expires, repeat the steps and use the newest link.

An administrator can also create a reset link for you from Team Access if you are having trouble with email (Chapter 5).

4. Roles: who sees what

Two roles matter inside your company:

- **Administrator** — runs the company in Job Pulse. Sees all of the company's jobs, billing, cash receipts, collections, and reports, and manages the company's team in Team Access. A company **owner** is an Administrator of their own company.
- **Project Manager (PM)** — works only the jobs assigned to their **PM code**. A PM sees and works their own jobs — costs, change orders, pay applications on those jobs — but does not see company cash receipts or collections.

Practical notes:

- PM access follows the **PM code** on the job. If a job is missing from your list, it is almost certainly a PM-code assignment issue — ask an administrator rather than trying another account.
- An **archived** job is read-only for everyone.

- Job Pulse itself is run by a **platform administrator** — not someone in your company. They set companies up; you never see their screens, and they are not part of your team. The appendix table lists all three roles side by side.

5. Team Access: adding your own people

Team Access is where administrators manage the accounts inside their own company.

From Team Access you can:

- **Add a team member** as an Administrator or a Project Manager. A Project Manager needs a **PM code** (a positive whole number) — that code is what ties jobs to them. Administrators do not use a PM code.
- **Create a setup link** for someone who has not finished setting up, or a reset link for someone who already has a password — the button reads **Create Setup Link** or **Create Reset Link**, depending on which the person needs. Job Pulse emails the link to them; creating a fresh link cancels the previous unused one.
- See each member's name, email, and role.

You can only manage people in your own company. Team Access cannot create companies, and it cannot change the platform administrator's account.

6. Creating a job

Jobs are created with the **New Job** wizard (**Jobs → New Job**). Take a few minutes here — two of the choices in this wizard become permanent once work starts.

The basics

- **Job number** and **job name**.
- **Customer (GC / Owner)** — required. This is the party your pay applications are addressed to. For D-101, that is Sample Builders LLC.
- **Contract value** — required. D-101's is $100,000.
- **Billing method** — quoted price or time & materials (next section). Shown on this step; a T&M job also gets the cap field described below.
- **Start date** — optional.

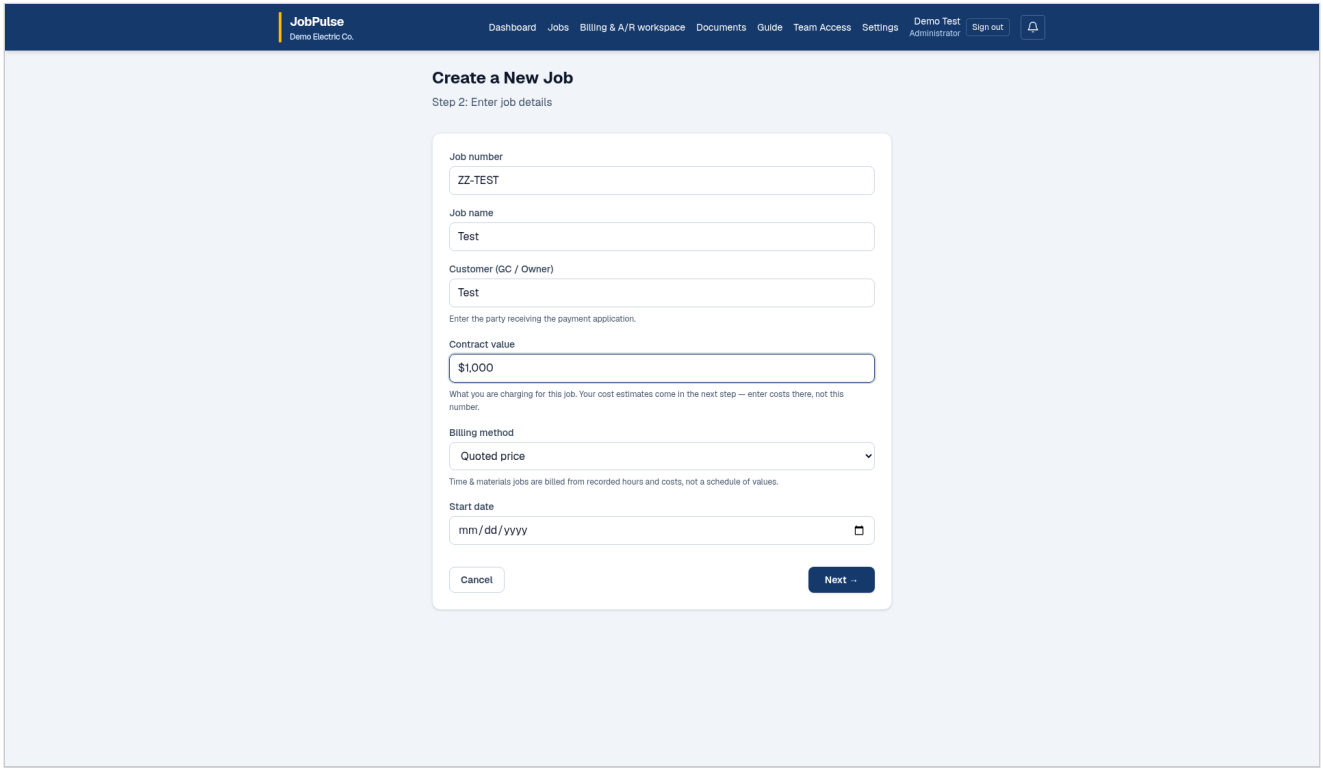
There is no project-manager field in the wizard. A new job carries the **PM code of the person who creates it** (or PM 0 if that person has no code), and that code is what decides which project managers see the job.

Billing method: quoted price or time & materials

Choose how the job will be billed:

- **Quoted price** — the normal contract job, billed against a schedule of values with pay applications (called **pay apps** in this manual).
- **Time & materials (T&M)** — billed from the work actually recorded: labor hours at your company's labor rate, materials with your company's markup, and other costs as described in Chapter 16. A bill on a T&M job is called a **T&M bill**.

For a T&M job you can also set a **Not-to-exceed cap (optional)** — the maximum the job may bill in total. Job Pulse warns you at billing time if a bill would push the job past its cap. The warning does not block the bill and does not change your numbers — it is there so a person decides.



The New Job wizard's job-details step. The Billing method field is where a job is set as Quoted price or Time & materials.

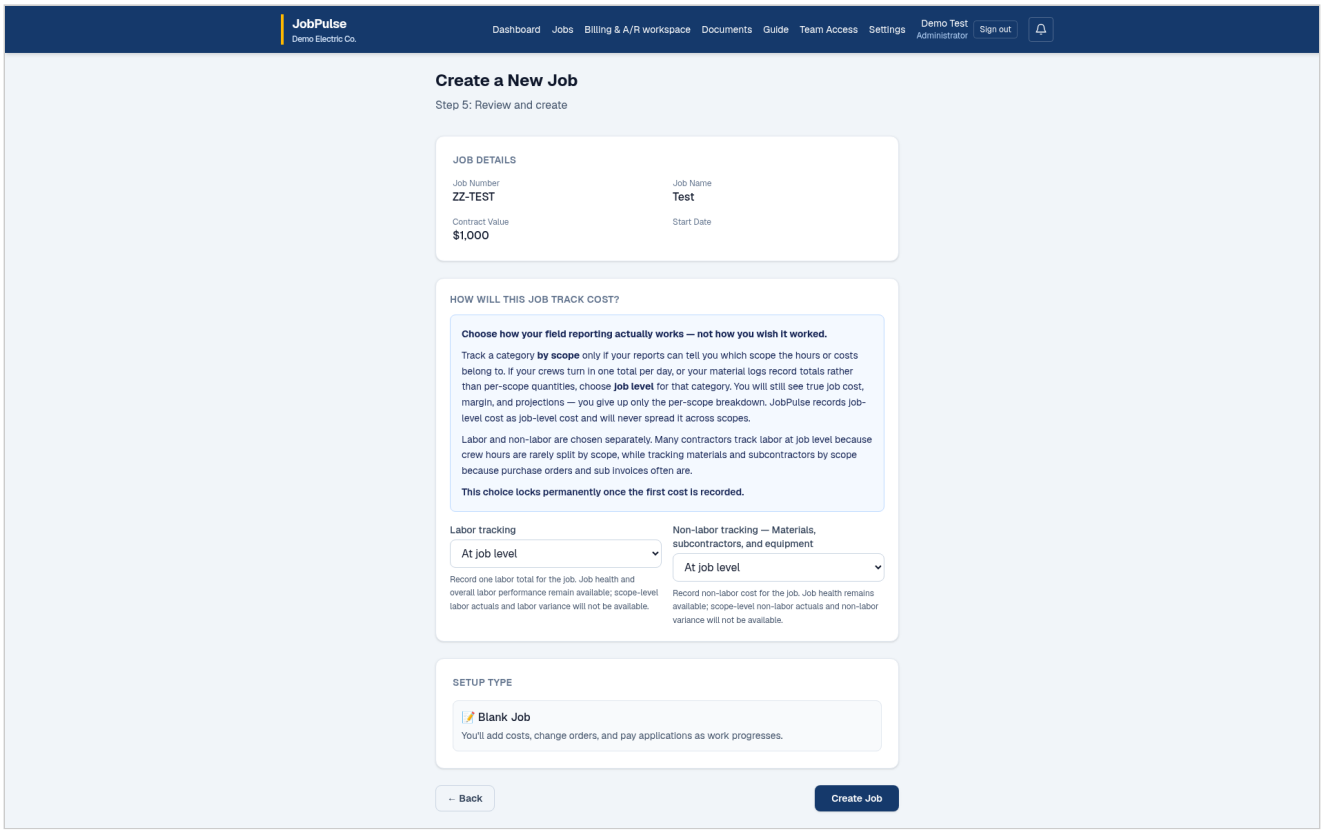
Cost tracking: at job level or by scope

Decide how costs will be reported from the field, separately for **labor** and for **non-labor** (materials, subcontractors, equipment):

- **At job level** — costs are recorded against the job as a whole.
- **By scope** — costs are recorded against the named parts of the job (scopes).

Which fits your crews? If your foreman's timesheet just says "Riverside Clinic – 8 hrs", choose **At job level**. If it says "Riverside Clinic – Rough-in – 8 hrs", you can choose **By scope**. Job-level costs still count fully toward job cost, margin, and projections — they simply do not break down by scope, and Job Pulse does not spread them across scopes for you.

> ⚠ **Can't undo:** the tracking choice becomes permanent with your first cost entry. After that, it cannot be changed — so decide from how your crews really report, not from how you wish they did.



The wizard's review step, where the job's cost-tracking choices are made. They lock permanently once the first cost is recorded.

The estimate: scopes

Add the job's named **scopes** (phases or parts of the work) and, for each, the estimate:

- Labor hours and the rate per hour.
- Materials, subcontractors, equipment, and other direct cost.

Estimated cost per scope is labor hours × rate, plus the direct-cost amounts. D-101's scopes are Rough-in, Trim, and Switchgear — the same three parts of the job you will see again as billing lines in the next chapter. At least one scope is **recommended** — scopes are what make margin-by-part-of-job reporting possible — but the wizard does not force you to add one.

Review and create

The final step shows the job back to you: job number, name, contract value, and start date, plus the billing method and the cost-tracking choices. **Check the tracking choices and billing method on this screen** — what the review shows is what the job is created with. Then click **Create Job**. The job starts **Active**, with no change orders or pay applications yet.

7. The schedule of values

What's a Schedule of Values (SOV)? It's the list of line items from your contract — for D-101: "Rough-in $40,000, Trim $25,000, Switchgear $35,000". Each month you bill a percentage of each line. Job Pulse uses it to build the standard AIA pay app (the G702 summary page and the G703 detail page) that GCs expect. The lines must add up **exactly** to your contract amount. That way every dollar you bill traces back to the contract.

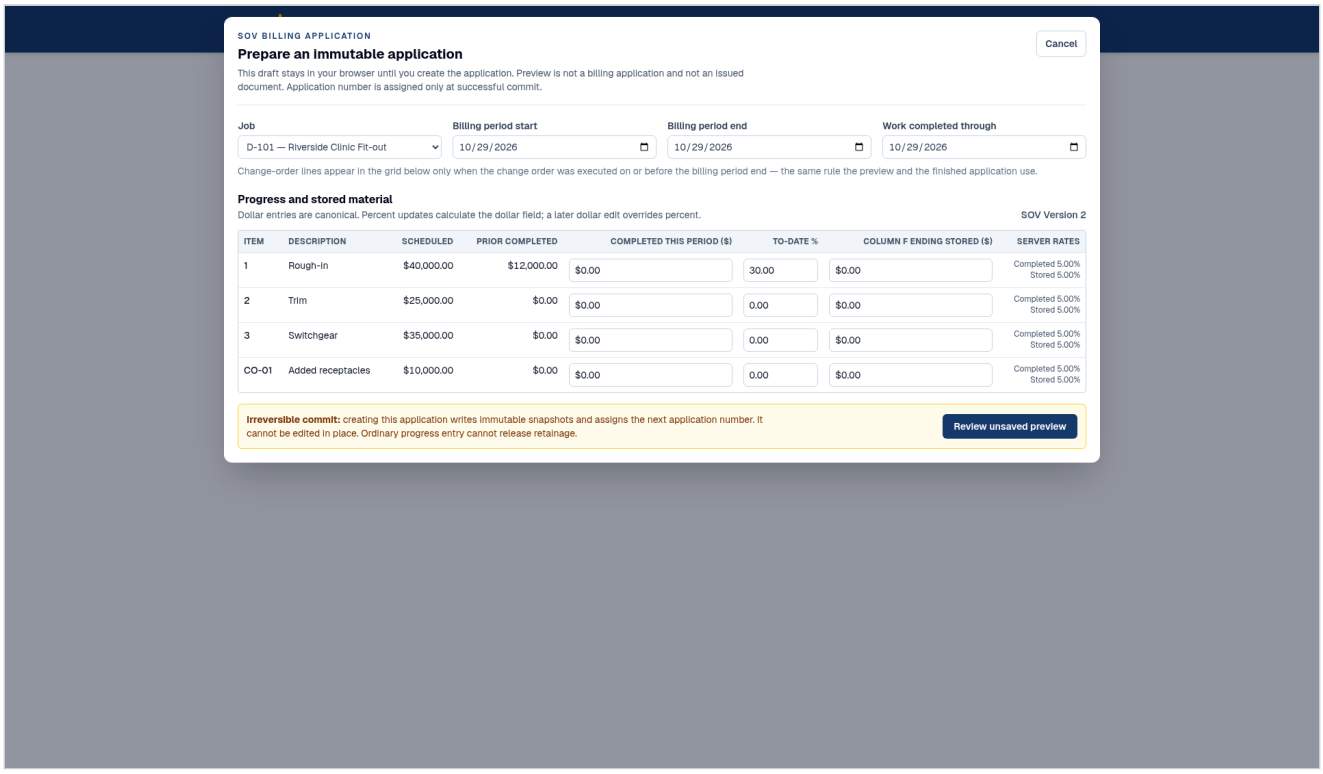
One distinction worth knowing early: **scopes** (Chapter 6) are how you track cost; **SOV lines** are how the customer sees your bill. They often match, as they do on D-101, but they don't have to.

The SOV lives with the job's billing, under **Billing & A/R**.

Setting up the SOV

1. Open the job's billing and start the SOV setup.
2. Add one line per billed item: item number, description, and scheduled value.
3. Set the two **retainage** percentages (below).
4. Save the draft.

Retainage is the percentage of each billing the customer holds back until the contract allows its release. It lives on the SOV setup as **two percentages**: one for completed work and one for **stored materials** (materials bought and on site, but not yet installed — you can bill for them before they're in place). The standard starting point is 5% each; set them to whatever your contract says. D-101 uses 5% and 5%. See Chapter 15.



D-101's schedule of values as it appears when you create a pay application: the three original lines (Rough-in $40,000, Trim $25,000, Switchgear $35,000) plus the line CO-01 added when it was executed — $110,000 in total, with retainage at 5% on completed work and 5% on stored material.

Activating the SOV

The SOV can be **Activate**d only when:

- It has at least one line, and
- The lines add up to **exactly** the job's current contract amount — not a dollar over or under.

That exact match is what keeps every later pay app honest. If you spot a mistake after activating but before billing anything, the first SOV can be reopened with **Reopen as draft**, corrected, and activated again. After the first pay app exists, the SOV changes only through executed change orders (see Chapter 10).

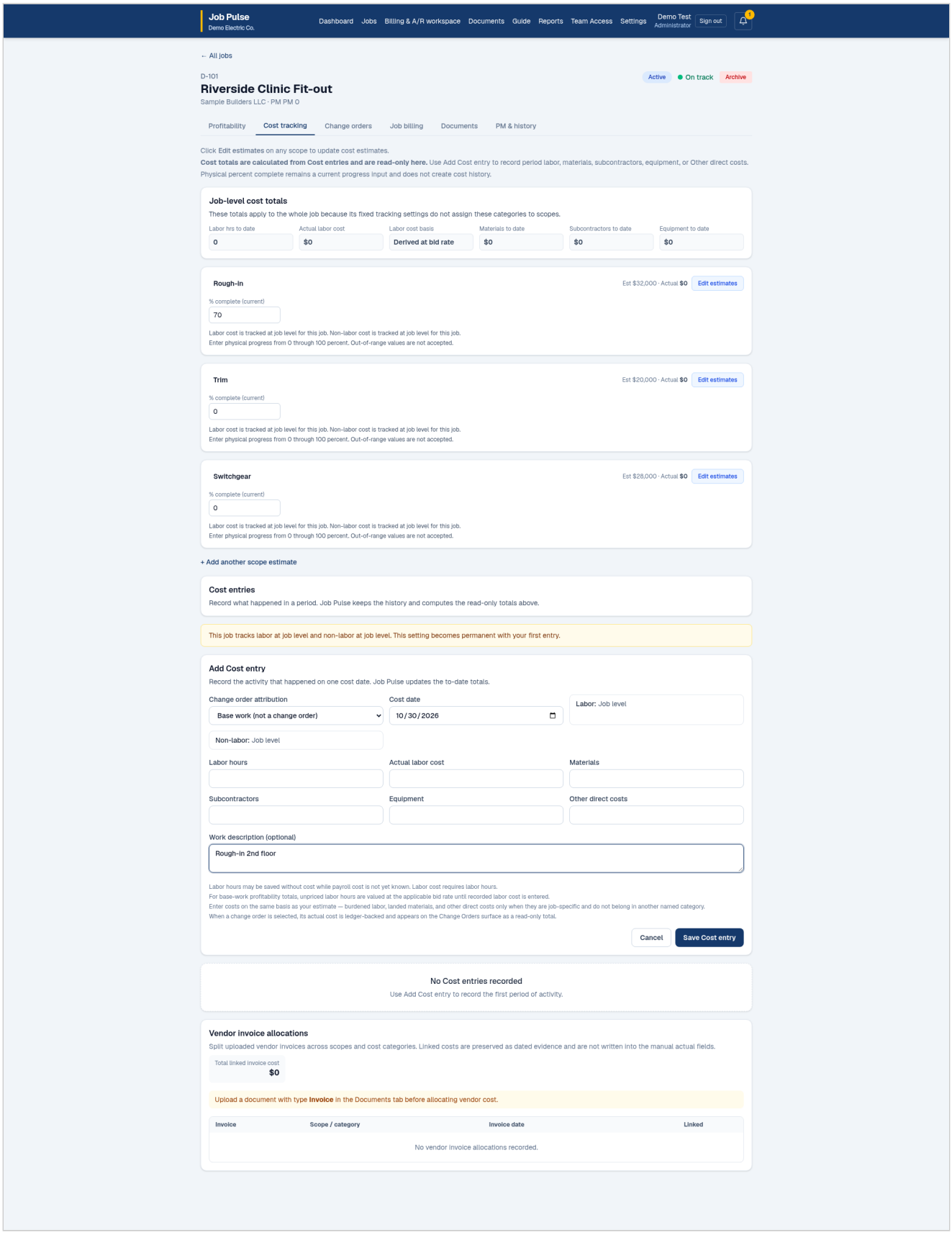
8. Recording costs

Use the job's **Cost tracking** tab to record the work and spend as they happen. Accurate, current costs are what make profitability, projections, and T&M billing worth anything.

Entering a cost

Each entry carries:

- **Date** (the effective date — it cannot be in the future).
- **What it was**: labor hours (and, if you have it, the actual labor cost), materials, subcontractor, equipment, and other direct costs. At least one positive amount is required.
- **Work description** — a short note of what the work was. Write it like the customer will read it, because on T&M jobs they will: descriptions print on the T&M invoice as the work performed. Entries show in the job's cost list with their descriptions, so anyone reviewing the job can see what each dollar was for.
- **Scope** — required for any category your job tracks **by scope**; not required for job-level categories.
- **Base work or a change order** — leave it as base work unless the cost belongs to a specific change order. You can tag a cost to a change order once that change order is **Executed** (Chapter 10 explains the stages).
- **Payroll coverage dates** (optional) — if you enter them, enter both the start and end dates.



The cost entry form on the Cost tracking tab, with the work description filled in.

> **Good to know — labor hours without a labor cost.** If you enter labor hours but no actual labor cost, the entry shows the labor cost as **Unpriced**. Job Pulse values those hours at the estimate rate for display and projections, and tells you it is doing so. Unpriced hours are a valuation, **not** recorded payroll cost — do not quote them as payroll.

Fixing a mistake: corrections, not overwrites

Never try to rewrite history. To fix an entry, use a **correction** and give a reason. Job Pulse keeps the original entry, adds an exact reversal, and adds your replacement — all three, plus your reason, stay visible in the job's history as one Correction event. If the replacement turns out to be wrong too, correct the replacement (use **Correct replacement** on the newest one) — a correction always chains through the latest replacement. A reversal itself cannot be corrected.

Rules that protect you

- Archived jobs accept no new entries.
- PMs can enter costs only on jobs assigned to their PM code.
- The tracking choice (Chapter 6) was locked by the first entry — the entry form follows it automatically.

9. Percent complete and job performance

Recording percent complete

Update each scope's **percent complete** as work progresses. You do this on the job's **Cost tracking** tab: each scope's card has a **% complete (current)** field — type the new figure and save the job. Job Pulse keeps a **dated history** of percent complete on the **Profitability** tab, so you can always see when a figure was set and how it moved.

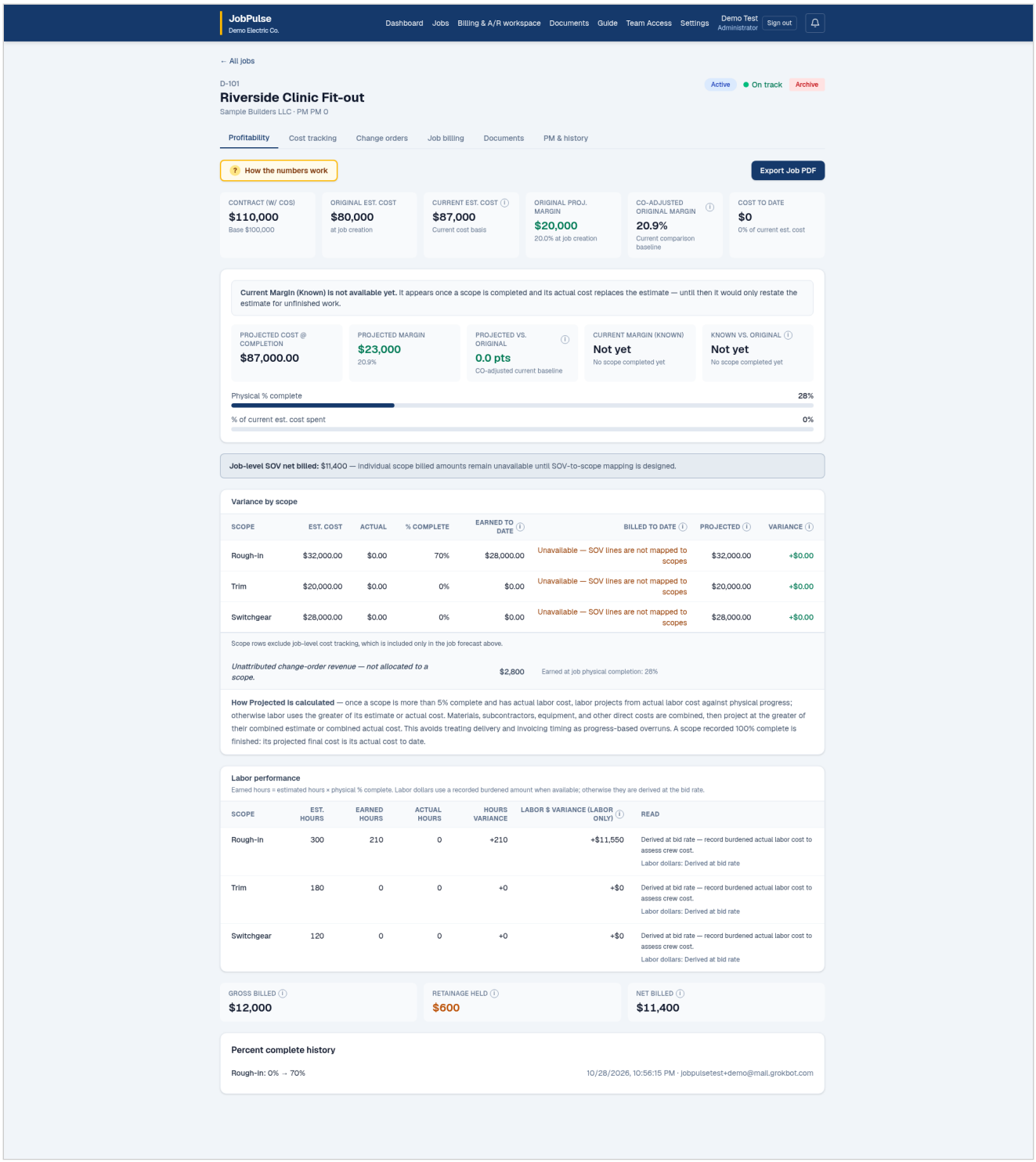
If a scope's percent complete has not been updated recently — nothing recorded yet, or the last update is over 30 days old — Job Pulse shows a **"Percent complete may be out of date"** reminder where you enter costs and on the job's overview. Saving an updated figure clears the reminder.

Reading profitability

The job's **Profitability** tab separates what is known from what is forecast:

- **Current Margin (Known)** — margin based on confirmed facts: contract, signed change orders, and costs recorded.
- **Projected Margin** — the same picture plus the forecast: what the job is expected to cost when finished, given percent complete and the cost trend.

Profit fade is margin slipping away while the job runs: Projected Margin drifting below the margin you estimated. Worked example: a scope estimated at $35,000 is 70% complete and has already spent $31,500, so Job Pulse projects a final cost of roughly $45,000 — $10,000 over. That's profit fade you can still act on.



The Profitability tab for D-101: contract $110,000 including CO-01; estimated cost was $80,000 when the job was created and is now $87,000 with CO-01; projected margin is

$23,000 (20.9%); Rough-in is 70% complete, the job is 28% complete overall, and nothing has been spent yet.

How to read it:

- A wide gap between Known and Projected means the forecast disagrees with the facts so far — worth a conversation.
- **Scope variance**: a scope in the red that is **not finished** is an early warning you can still act on; a scope in the red that **is finished** is a realized overrun.
- At **100% complete**, a scope's projected final cost is simply its actual cost to date — there is nothing left to forecast, and the underrun or overrun shown is the real one.
- Billed amounts and cash received are **not** profitability events. Profitability moves with contract, signed change orders, and costs — billing and cash are separate tracks (see the table in Chapter 10).

10. Change orders

A **change order (CO)** is a tracked change to the contract — extra work, a credit, or a revised price. Job Pulse walks each CO through a fixed path, in order:

Pending → Submitted → Approved → Signed → Executed (a CO can also be **Rejected** along the way; rejecting asks for a reason, and a rejected CO can be moved back to Pending).

- If you try to skip a step — for example, signing a CO that is still Pending — Job Pulse stops you and **tells you the next step that is required**. Follow the message; there is no way around the order, by design. Note that **Executed** is not a status you pick from the list — you reach it through the **Execute signed change order** action described below.
- The CO number field **pre-fills the real next number** in sequence (D-101's first is CO-01). You can change it, but it is never secretly blank behind placeholder text.
- Add the CO's revenue and its estimated cost. D-101's CO-01, "Added receptacles", is $10,000 of revenue with a $7,000 estimated cost. If a signed CO has revenue but **no cost basis**, Job Pulse flags it — **Cost basis required** — rather than inventing a cost. Enter the estimated cost, or choose **No incremental cost (confirm $0)** if there truly is none.

When a change order counts

Stage reached	Profitability	Billing
Pending, Submitted, Approved	No effect yet	Not billable
Signed	Counts: contract and margins update	Not yet in the SOV

Stage reached	Profitability	Billing
Executed	Counts	Added to the SOV and billable on pay apps

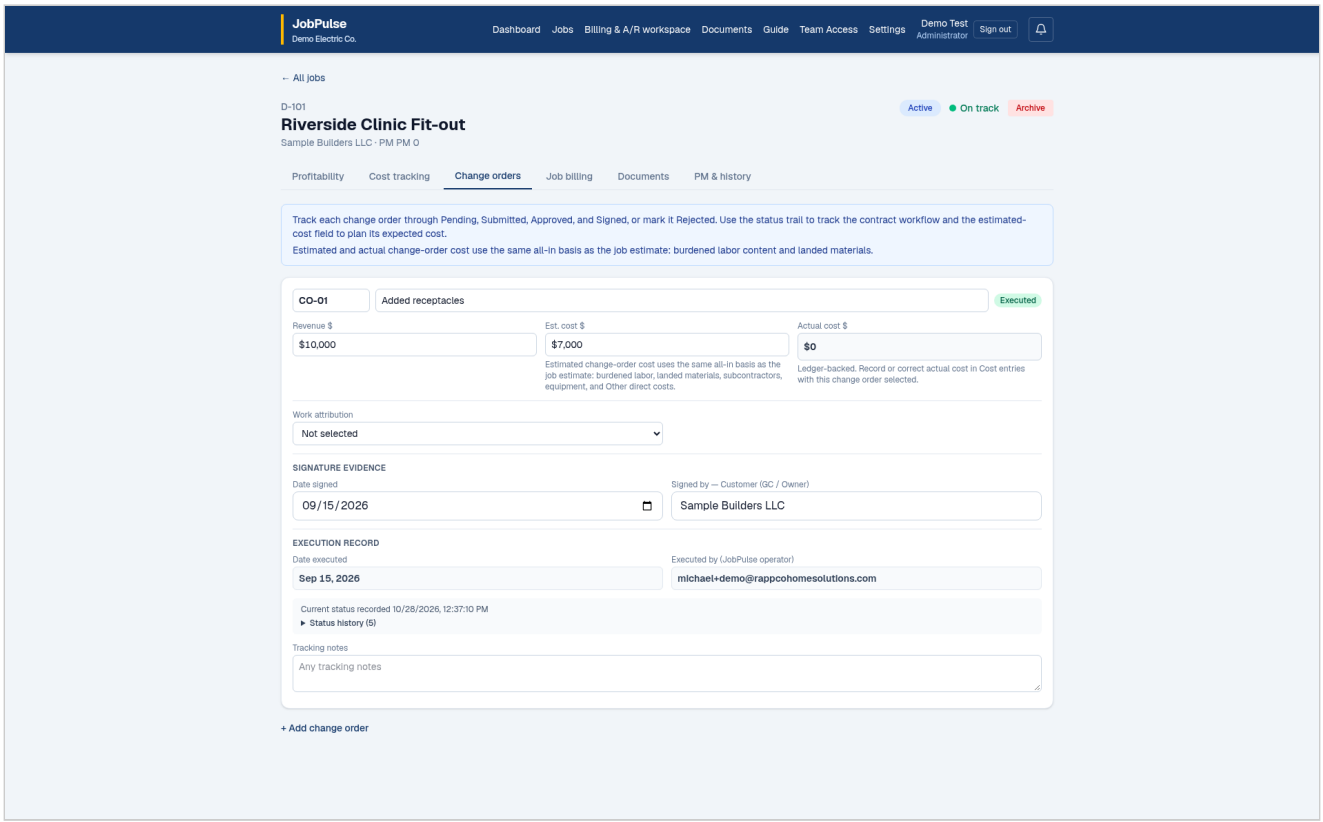
Two words to keep straight: **Signed** = the paperwork is signed. **Executed** = you've put it into effect in Job Pulse with **Execute signed change order**. The **Date executed** decides the billing month — the rule is in the next section.

Executing a change order

Execution is what moves a signed CO into the billing structure. To execute:

1. The CO must be **Signed**.
2. The job needs an **active SOV** that reconciles to the contract.
3. In the execution step, allocate the CO's revenue across SOV lines — the app builds the new lines representing the CO and checks that the allocations total the CO revenue exactly.
4. Confirm the **Date executed**. It defaults to today, and you can enter an earlier date if the CO was actually executed earlier. Read the help text on this field — it matters, as the next section explains.

Executing creates a **new SOV version**: the contract amount increases by the CO amount, prior lines carry forward, and the CO's lines are added.



CO-01's record after execution: revenue $10,000, estimated cost $7,000, signed by Sample Builders LLC — and the execution record showing the Date executed, Sep 15, 2026.

The executed date decides which pay app gets the CO

Which pay app gets a change order? The one whose period includes the date the CO was executed.

Example, using D-101: the contract is $100,000, and CO-01 for $10,000 was executed on **Sep 15**.

- **August pay app** (period ends Aug 31): contract to date **$100,000**. CO-01 isn't on it — even if you create the August app in October.
- **September pay app** (period ends Sep 30): contract to date **$110,000**. CO-01 is billable from here on.

The rule behind the example: a change order appears on a pay app only if its **executed date is on or before that app's period end**. Executed after the period end, the CO is excluded completely — on screen, in the preview, and in the PDF. The date the CO was signed does not decide this; the **executed** date does.

> ⚠ **Can't undo:** when you execute a CO, enter the **real** executed date, not today's date, if it was executed earlier. The executed date decides which month the CO is billed in — get it wrong and the CO lands on the wrong pay app.

11. Pay applications

A **pay app** is the periodic bill on a quoted-price job. Pay apps are created and run in **Billing & A/R** — that is the one place billing happens. The billing tab on a job's own page shows the same pay apps and totals, but it is a window, not a second way to bill; for a job with an SOV, Job Pulse will stop you if you try to start a pay app from the job page.

Two terms run this chapter and the next:

- **Issued** = the pay app has a number and its figures are frozen.
- **Posted** = you have recorded that you sent it, and it now counts as money owed (A/R).

Creating an application

1. In Billing & A/R, click **Create SOV application** for the job.
2. Set **Work completed through** to the last day of the billing period. ⚠ It starts out showing **today's date** — change it. (D-101's August app uses Aug 31.)
3. Enter this period's progress against each SOV line. Dollar entries are what count: type the amount in **Completed this period ($)**. If you think in percentages, type a **To-date %** instead and Job Pulse converts it to dollars for you — a later dollar entry overrides the percentage. **Stored materials:** in **Column F ending stored ($)**, enter

what's sitting on site, not yet installed, at the end of the month. When stored material gets installed, add it to **Completed this period ($)** and lower Column F by the same amount. Job Pulse makes sure you don't bill it twice.

> Example: $8,000 of switchgear was stored last month and installed this month → Completed this period +$8,000, Column F −$8,000.

4. Review the **continuation sheet** entries: they are filtered to the period you are billing, using the executed-date rule from Chapter 10. CO lines executed after the period end are not offered and cannot sneak in. On D-101's August app, CO-01 is not offered — it wasn't executed until Sep 15.
5. Check the **preview**. The preview shows exactly what the issued pay app will say — same figures, same CO treatment.
6. Issue the application.



Executed change orders

PERIOD	ADDITIONS	DEDUCTIONS	NET
Previous months	$0.00	$0.00	**$0.00**
This billing period	$0.00	$0.00	**$0.00**
Totals	$0.00	$0.00	**$0.00**

Application summary

1. Original Contract Sum	**$100,000.00**
2. Net Change by Change Orders	**$0.00**
3. Contract Sum to Date	**$100,000.00**
4. Total Completed and Stored to Date	**$12,000.00**
5a. Retainage on Completed Work	**$600.00**
5b. Retainage on Stored Material	**$0.00**
5. Total Retainage	**$600.00**
6. Total Earned Less Retainage	**$11,400.00**
7. Less Previous Certificates for Payment	**$0.00**
8. Current Payment Due	**$11,400.00**
9. Balance to Finish, Including Retainage	**$88,600.00**

Lines 4–6 show completed work and retainage through this application. Retainage reflects amounts held less amounts released. Line 8 is the payment due for this billing period.

Current billing period

GROSS BILLED THIS PERIOD
$12,000.00

RETAINAGE HELD THIS PERIOD
$600.00

RETAINAGE RELEASED THIS PERIOD
$0.00

NET DUE THIS PERIOD
$11,400.00

Continuation Sheet

Work and retainage through this application. Retainage reflects amounts held less amounts released.

ITEM	DESCRIPTION	C SCHEDULED VALUE	D PREVIOUS	E THIS PERIOD	F MATERIALS PRESENTLY STORED (ENDING BALANCE)	G TO DATE	%
1	Rough-in	$40,000.00	$0.00	$12,000.00	$0.00	$12,000.00	30.00%
2	Trim	$25,000.00	$0.00	$0.00	$0.00	$0.00	0.00%
3	Switchgear	$35,000.00	$0.00	$0.00	$0.00	$0.00	0.00%
Totals		**$100,000.00**	**$0.00**	**$12,000.00**	**$0.00**	**$12,000.00**	**12.00%**

The issued August application's continuation sheet: Rough-in $12,000 (30%), $100,000 scheduled in total, $600 of retainage — and no CO-01 line, because it was not executed until September.

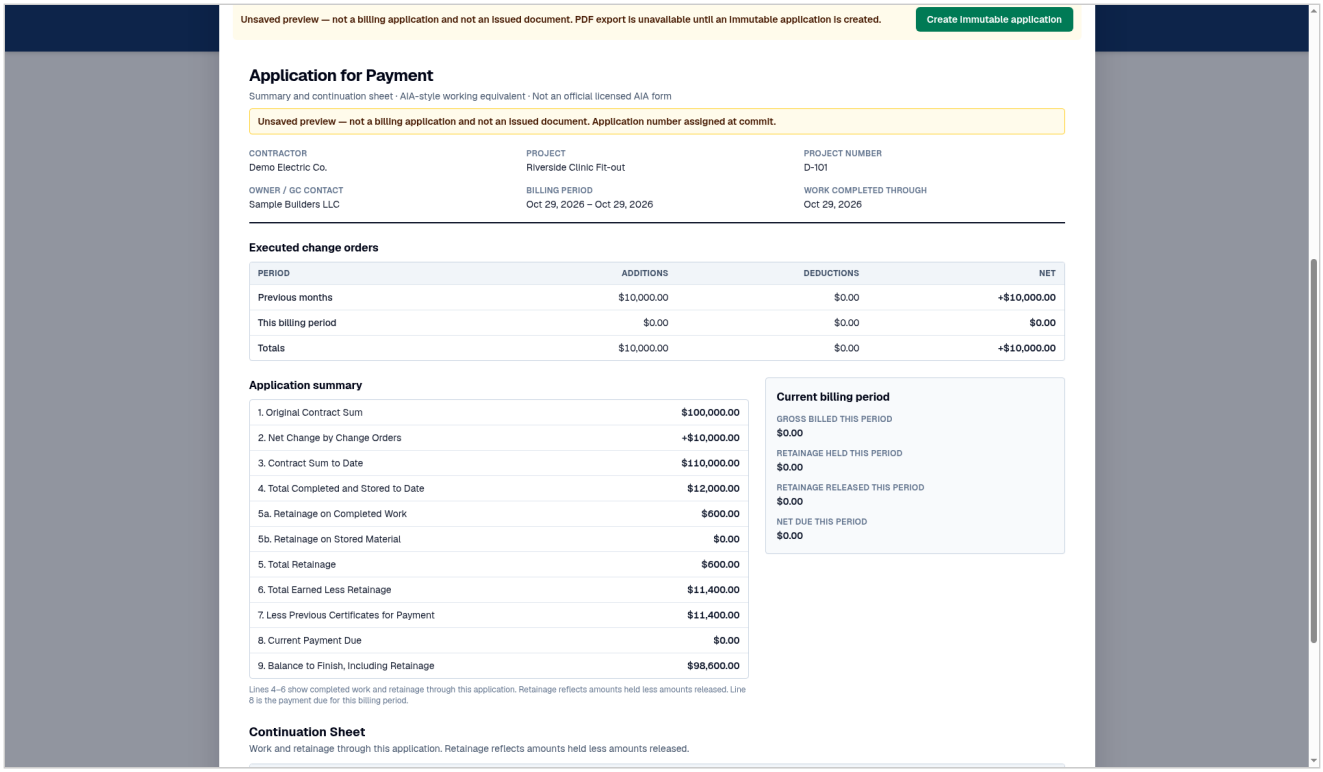
Rules you will run into, all deliberate:

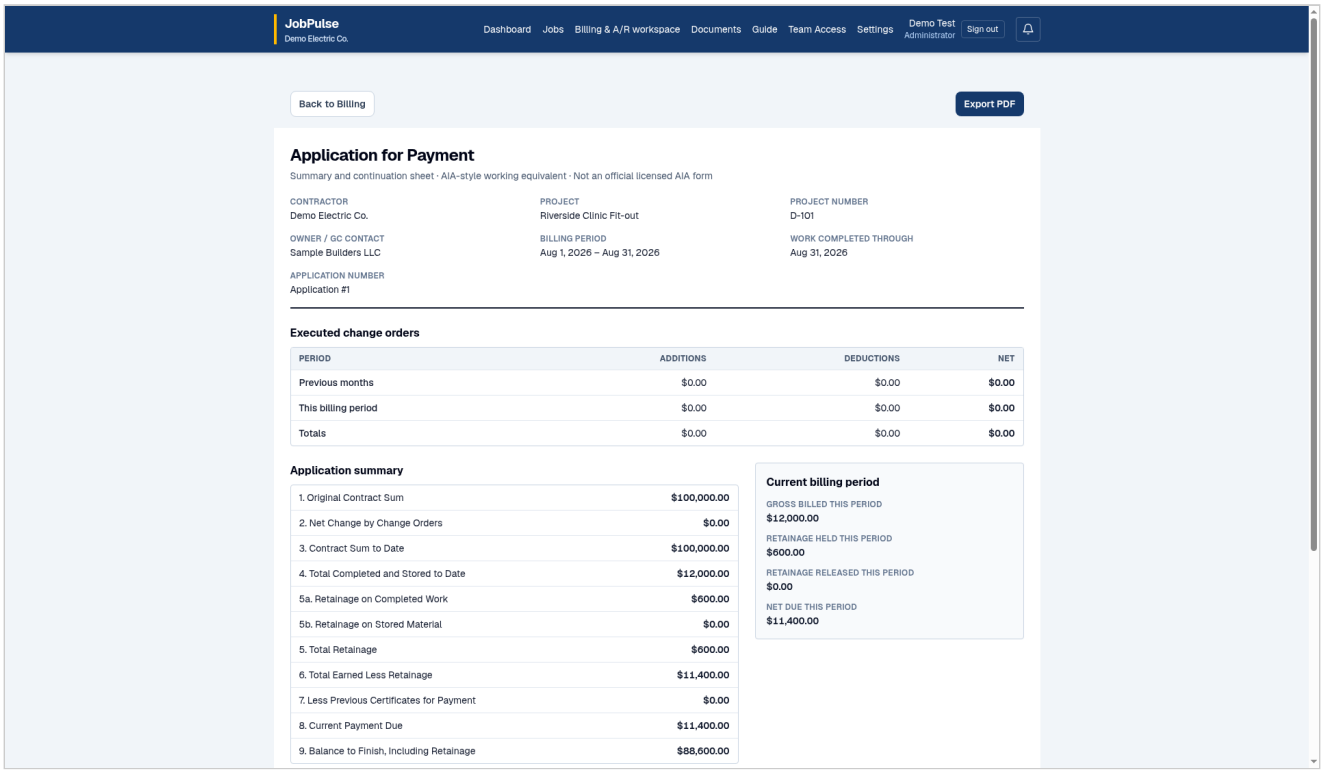
- One pay app per job per work-completed-through date — a duplicate for the same date is refused, unless the first one was voided.
- **Fixing a botched draft:** if you issued a pay app with a mistake and it has **not been sent yet**, an administrator can void it: open the application and use **Void this billing cycle** in the action panel, entering a reason. The void is permanent and recorded, the

voided app's work returns to the billable pool, and you can create the corrected application for the same period right away. The corrected application takes the next application number — numbers are never reused, so the replacement for a voided Application #1 is Application #2. Once a sent date has been recorded the void option is gone — from that point a wrong application is corrected with **Not accepted** and a replacement, because the GC has seen it.

Preview vs. issued

- A **preview** is unsaved, has **no application number**, and is not a document you can send.
- An **issued** pay app has an application number and **frozen totals**.





First: a preview — the banner says it is not a billing application, and there is no application number. Second: the issued August application, numbered Application #1.

> ⚠ **Can't undo:** issuing freezes the pay app's figures. Issued pay apps are not edited afterward — if one is wrong, it is dealt with through the lifecycle (Chapter 12), never quietly rewritten. Check the preview first.

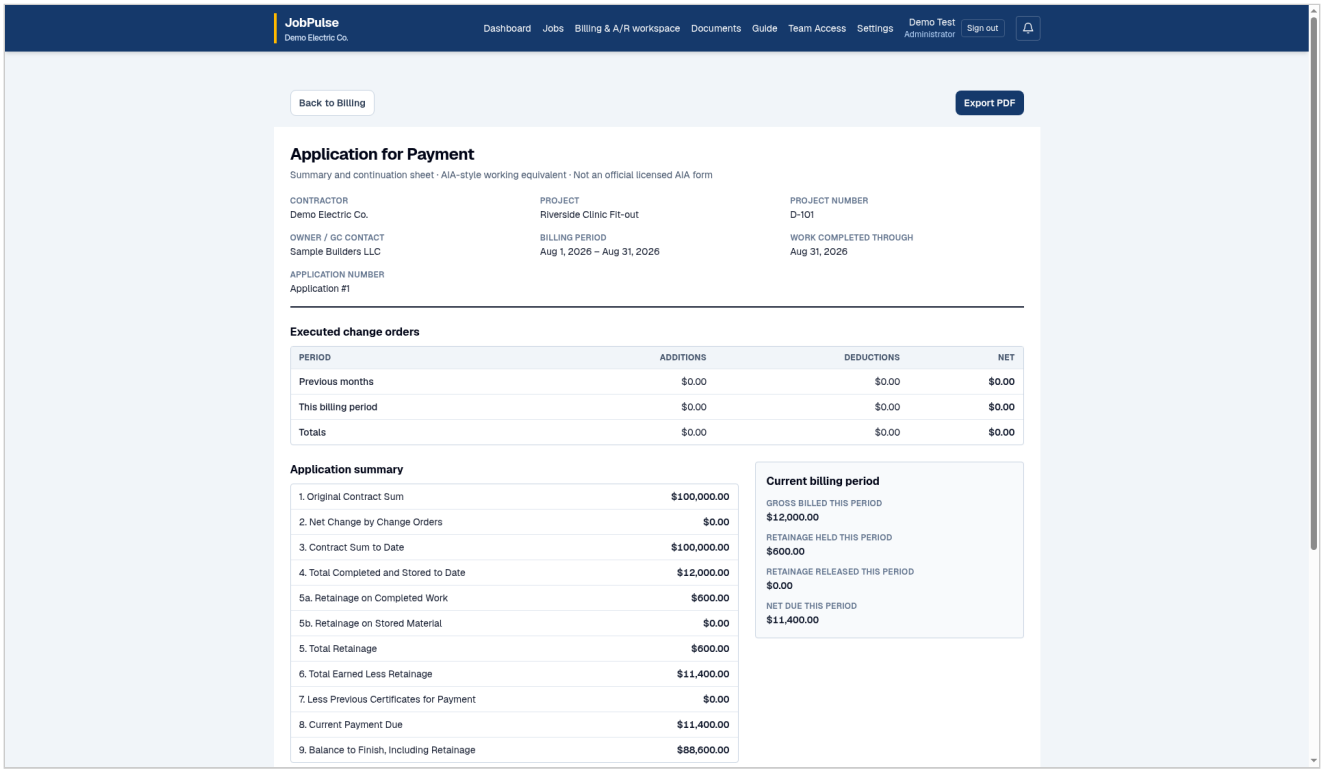
Reading the application (G702 summary)

The pay app summary follows the standard AIA **G702** layout. (The G702 is the one-page summary; the **continuation sheet, G703**, is the line-by-line detail behind it.) The nine lines:

1. **Original contract sum** — the contract before change orders.
2. **Net change by change orders** — COs executed through this period (Chapter 10's rule).
3. **Contract sum to date** — line 1 + line 2.
4. **Total completed and stored to date** — work in place plus stored materials, cumulative.
5. **Retainage** — held per the SOV's retainage percentages.
6. **Total earned less retainage.**
7. **Less previous certificates for payment** — what earlier pay apps already claimed.
8. **Current payment due** — what this pay app asks for.
9. **Balance to finish, including retainage** — what remains after this pay app.

On D-101's August app — 30% of Rough-in billed, nothing else yet — the figures are: line 3 **$100,000** (CO-01 not yet executed), line 4 **$12,000**, line 5 **$600**, line 8 **$11,400**, line 9 **$88,600**.

> **3 numbers to check before you send:** line 3 — does contract to date include only the COs you expect? Line 5 — is retainage the right %? Line 8 — does this match what you plan to invoice?



The Application for Payment for D-101's August app. Check line 3 (contract sum to date, $100,000), line 5 (total retainage, $600), and line 8 (current payment due, $11,400). The page labels itself an AIA-style working equivalent — not an official licensed AIA form.

The continuation sheet (G703) lists every SOV line — scheduled value, previous applications, this period, stored materials, total completed, percent, balance to finish, and retainage — plus the CO lines that belong to this period.

The PDF

Download the issued pay app as a **PDF** from the application page. The PDF carries the same figures as the screen — summary and continuation sheet — and is the document you send. Check that you are exporting the issued pay app (with its number), not a preview.

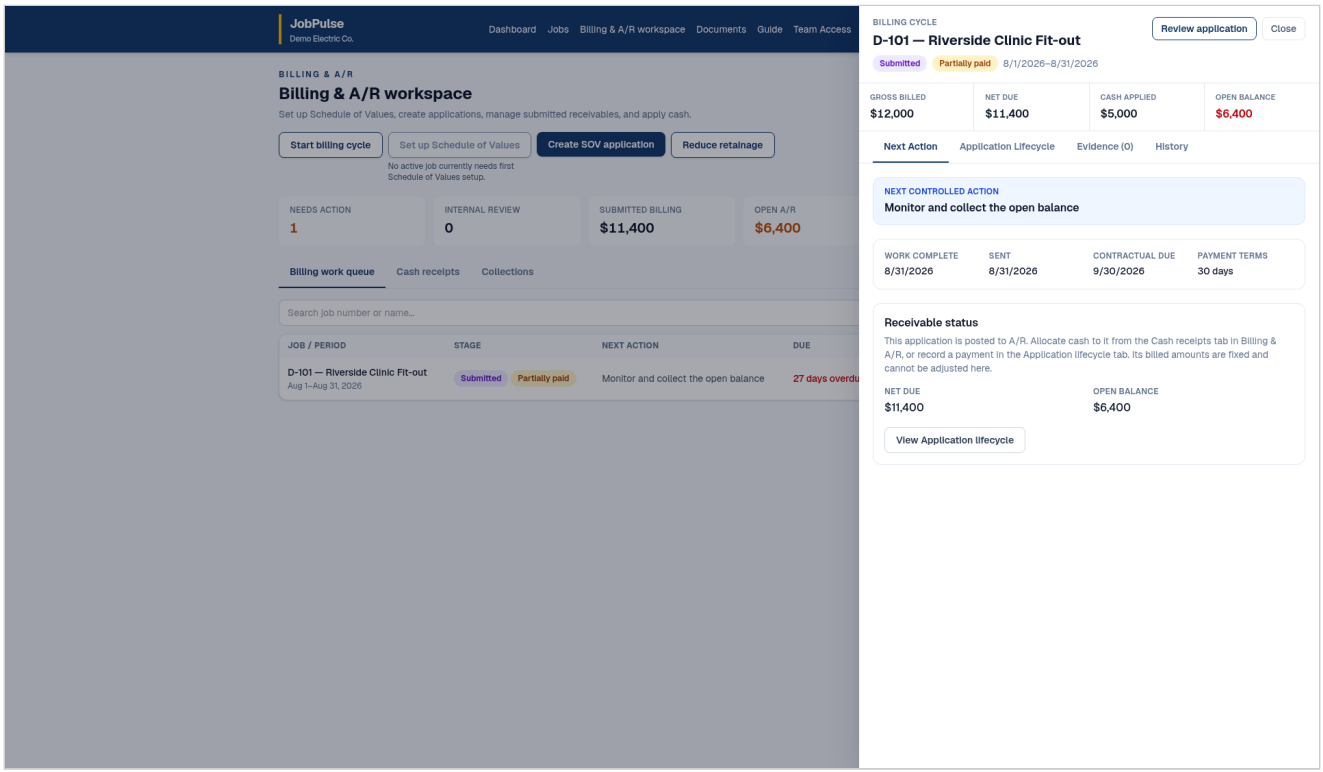
12. Sending and posting a pay application

Why this step matters: a pay app you've issued is just a document. Job Pulse doesn't count it as money owed until you tell it you **sent** it. After you click **Record sent date**, the pay app gets a due date (sent date plus your payment terms), shows in A/R and **aging** — how late a bill is, counted from its due date — and can have a check applied to it.

Recording the sent date (posting to A/R)

On the issued pay app, open the **Application lifecycle** area — the card is titled **Record sent — post to Accounts Receivable**:

1. Click **Record sent date**.
2. Enter the date you actually sent the pay app to the customer. (D-101's August app was sent Aug 31.)
3. Confirm the **Payment terms (days)**. Job Pulse offers your company default — **Use company default (30 days)** unless your company set a different one — or you can enter a value for this pay app. The **Due date** preview updates as you change it (Aug 31 + 30 days = due Sep 30).
4. Confirm with **Record permanent fact**.



The August app's billing panel after the sent date was recorded: work complete Aug 31, sent Aug 31, 2026, 30-day terms, contractual due Sep 30, 2026. The $5,000 receipt has since been applied, leaving $6,400 open.

> ⚠ **Can't undo:** the sent date is permanent once saved — that's why the confirm button says what it says. Double-check it against the email or portal upload before you confirm.

From that moment the pay app:

- Shows in **Submitted billing** and **Open A/R** totals.
- Appears in aging, based on its due date (not the date it was created).
- Can **receive cash** (Chapter 13).

SOV pay apps do not use the internal draft / proof steps that T&M billing uses — recording the sent date is their posting path, and the billing screen says so where you would otherwise expect those steps.

> **If the customer rejects a pay app:** click **Record not accepted** and enter the date. Job Pulse takes it out of money owed, and the work on it becomes billable again on your next pay app. Nothing is deleted. Then create a corrected pay app.

Always record payments in **Cash receipts**. (The lifecycle's **Record payment** only adds a note; it doesn't apply cash.)

13. Receipts and applying cash

Cash receipts is administrator-level, company-wide, and lives in **Billing & A/R**.

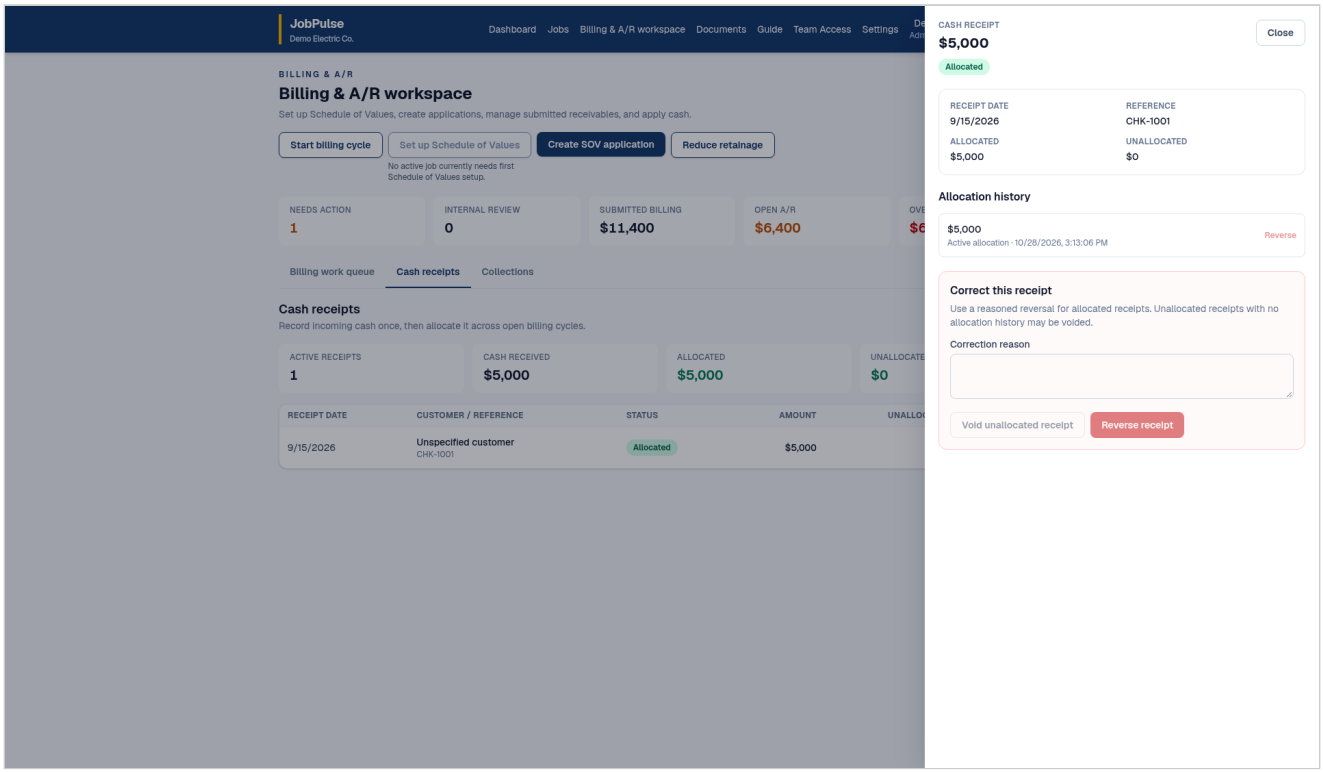
Recording a receipt

Record each incoming payment with its date and amount, and optionally the customer, a check/ACH reference, and notes. A new receipt starts **Unallocated** — recorded, but not yet applied to any bill. Example: Sample Builders pays $5,000 against D-101's August pay app, check reference CHK-1001.

Allocating a receipt

Open the receipt and allocate it to open, posted bills. The rules, in plain terms:

- You can't apply more than what's left on the check, or more than what's still owed on the pay app. **Overpayments are refused** — if a customer genuinely overpaid, leave the extra unallocated on the receipt until you decide how to handle it.
- A receipt can be split across several bills.
- Receipt status follows the money: **Unallocated → Partially allocated → Allocated** — plus **Voided** and **Reversed** for receipts that were undone (below). Allocating all $5,000 of the example receipt to the August pay app makes the receipt **Allocated**.
- A bill that is partly covered shows as **Partially paid** wherever payment status is displayed; when allocations cover its full amount due, it becomes **Paid**. The August pay app, $11,400 due with $5,000 applied, is **Partially paid** with $6,400 still owed.



The $5,000 receipt (reference CHK-1001, received Sep 15) fully allocated. Its detail panel shows the allocation history and the correction tools.

Fixing allocation mistakes

- **Reverse** an allocation to undo it: select the allocation, enter a **Correction reason**, and click **Reverse** (the button stays off until a reason is entered). The reversal is recorded with its reason, and the bill's open balance comes back.
- A receipt with **no allocations yet** can be voided with **Void unallocated receipt**. Once a receipt has allocation activity, you cannot void it — reverse the allocations instead.
- Receipt details are locked once the receipt has any allocation activity — even reversed activity. If you recorded a receipt wrongly before allocating anything, void it and record a fresh one.

14. Collections

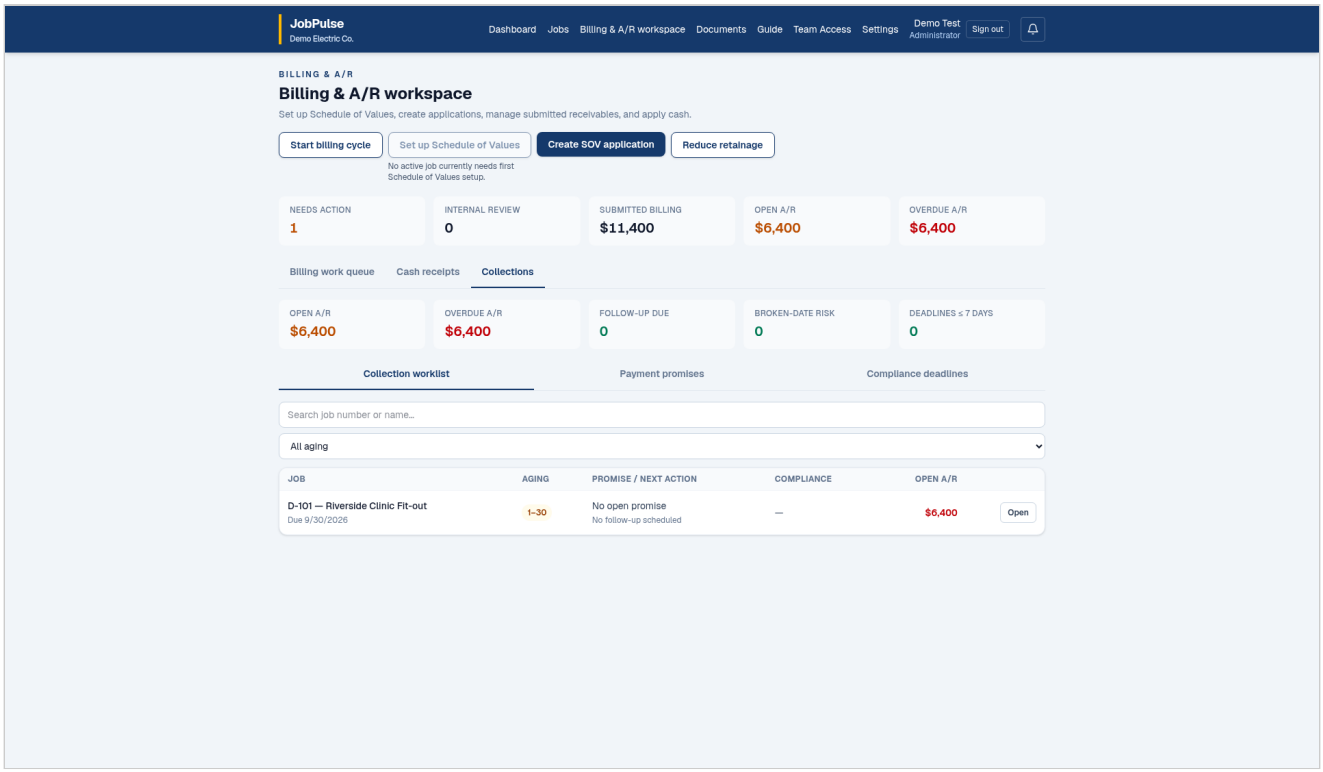
Collections (administrators, in Billing & A/R) is where overdue money gets worked.

The worklist

The worklist shows posted bills with a due date and a positive open balance, worst first — most overdue, then largest balance. Filters group bills by how late they are:

- **Current** (not yet due), **1–30**, **31–60**, **61–90**, and **Over 90 days** past due.

The Collections worklist always shows lateness **as of today** — it has no as-of date of its own. To see aging on a different date, use Reports (Chapter 19). D-101's August app appears on the worklist as soon as it's posted (Current). After Sep 30, it moves to 1–30 days with $6,400 open.



The Collections worklist: D-101's August app with $6,400 open, due Sep 30, 2026, in the 1–30 day bucket, with no promise or follow-up scheduled yet.

Logging activity

Against any bill or job, log the follow-up: **Call**, **Email logged**, **Statement logged**, **Escalation**, **Note**, **Meeting**, or **Other** — with the activity date, a summary, notes, optional evidence, and a **Next action date** if there's a follow-up planned. Click **Save activity**. The history builds the record of what was done, in order.

Payment promises

When a customer commits to pay by a date, record a **payment promise** for the bill:

- The promised amount **cannot exceed the open balance**.
- Only **one open promise** is allowed per bill. If a promise is already open, the button to add another is turned off — close out the existing promise first, then record the new one.
- When the date passes or the customer pays, use **Mark kept** or **Mark broken** (or **Cancel**, or **Replace promise** to supersede it with a new one). Marking broken, cancelling, and replacing all ask for a reason.

Also available: compliance deadlines

You can track **compliance deadlines** against a job (notices, filings, and similar dated obligations) on the **Compliance deadlines** tab: **Add compliance deadline**, enter the notice or requirement in your own words, the deadline date, any jurisdiction context, and notes, then **Add deadline**. As things develop you can start it, complete it (completion requires evidence from the job's documents), waive it, cancel it, or reopen it — waivers, cancellations, and reopens require a reason. As the screen itself says: this tracks deadlines operationally; it is not legal advice.

Also available: reminders

Job Pulse generates reminders under the heading **Billing & A/R reminders** for the things that need attention: T&M proof due, billing drafts due, internal review and external submission overdue, invoices due or overdue, a payment promise still open past its promised date, compliance deadlines approaching, and unallocated receipts sitting idle. Administrators see the full set; PMs see only the T&M proof and billing draft reminders, and only for their own jobs. Click **Dismiss** on a reminder that no longer applies.

15. Retainage and job closeout

How retainage works day to day

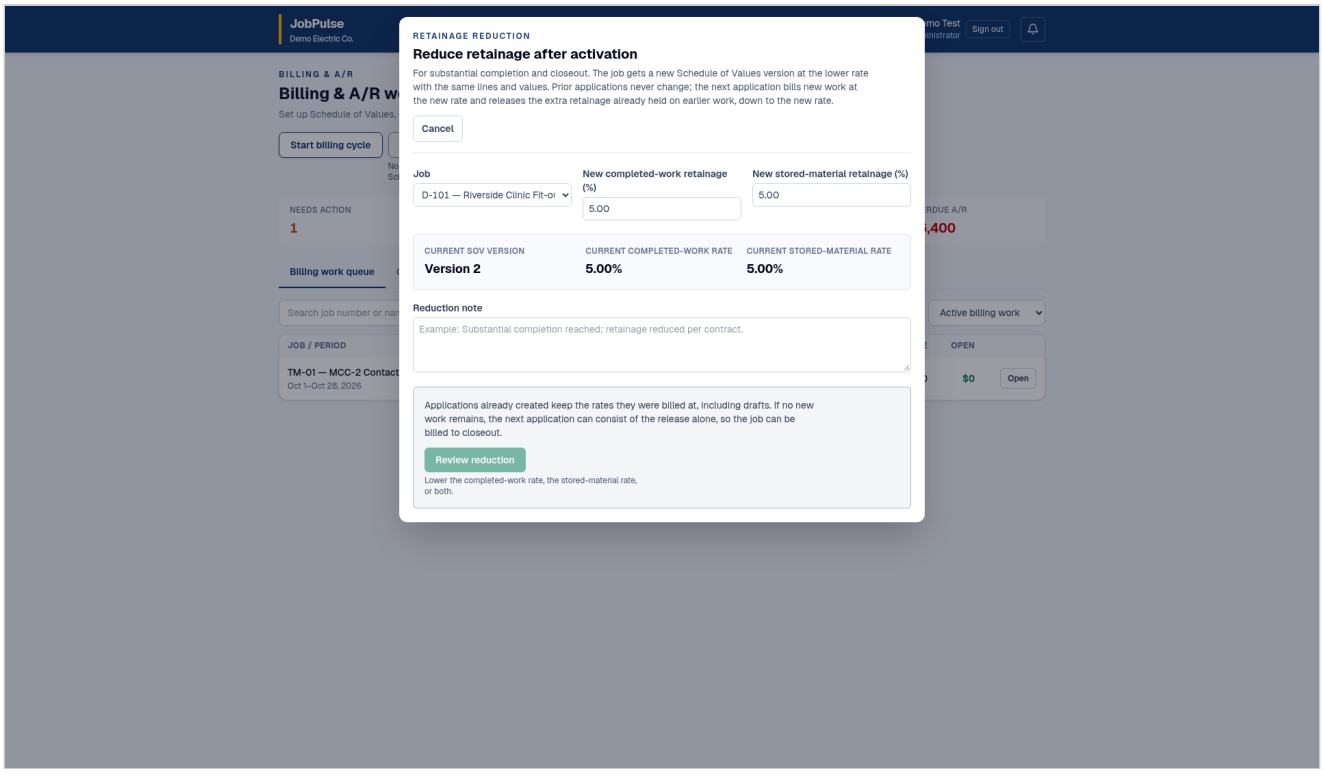
Every pay app holds retainage at the percentages set on the SOV — one for completed work, one for stored materials (Chapter 7). The pay app shows retainage held this period and cumulatively, and the balance-to-finish line (line 9) includes retainage still held. On D-101's August app, that's the $600 on line 5.

Reducing retainage mid-job

Contracts often allow retainage to drop at a milestone — substantial completion is the common one. When that happens:

1. In **Billing & A/R**, choose **Reduce retainage**.
2. Pick the job, and enter the **New completed-work retainage (%)** and the **New stored-material retainage (%)**. Add the **Reduction note** — a short explanation of why (the example in the app is "Substantial completion reached; retainage reduced per contract."). The note is required.
3. Click **Review reduction**, check it, and confirm with **Reduce retainage**.

Saving creates a **new SOV version** with the lower rates — and no bill. Two rules: a new rate can only be **lower** than the current one, never higher, and at least one of the two rates must actually go down. Pay apps already issued keep the figures they were issued with — history is not rewritten. The lower rate applies to billing from that point forward.



The Reduce retainage dialog for D-101: the job is on SOV Version 2 at 5.00% on completed work and 5.00% on stored material. Lower either rate, add a note, and review to create the reduced-rate version. (Shown before any reduction is made.)

Collecting released retainage, and the final pay app

Reducing retainage doesn't put money on a bill by itself. To collect what was released:

1. **Create SOV application** for a new period with **0 work this period**.

2. Check the G702: **line 5 (retainage) should drop by the released amount, and line 8 (current payment due) should be the released amount**.

At closeout, run the reduction all the way to 0% on both rates. Example, finishing D-101: with the whole $110,000 contract (including CO-01) complete, retainage held at 5% is $5,500. Reduce both rates to 0%, then create the final pay app with 0 work this period — line 5 reads **$0** and line 8 reads **$5,500**, the retainage coming back. Check the final pay app's G702 carefully — contract sum to date, total completed, retainage released, and balance to finish at zero — before you record its sent date and send it, because it closes the job's billing story.

16. Time & materials jobs, end to end

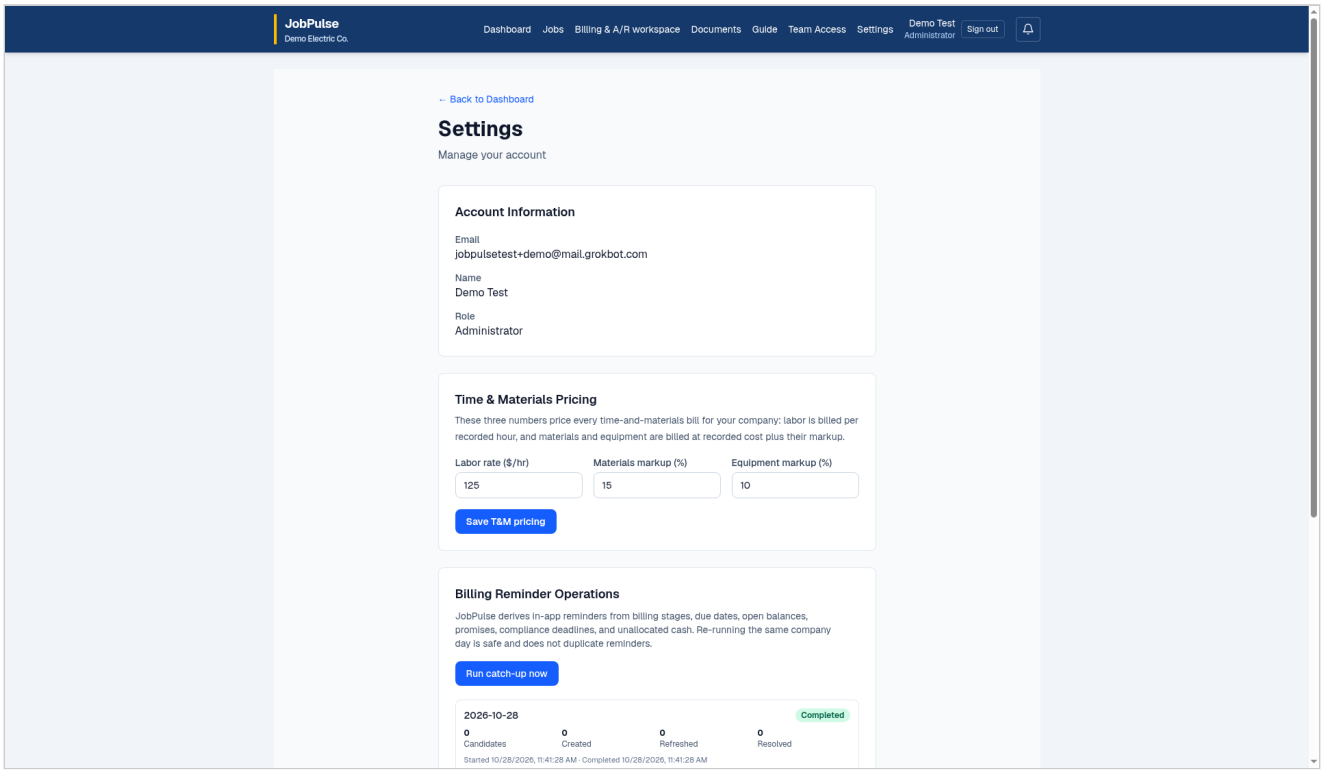
T&M jobs bill the work actually recorded, at your company's rates. This chapter runs the whole flow, in the order the billing screen walks you through it.

Step 1 — Set your company's rates (once)

An administrator sets the rates in **Settings**, in the **Time & Materials Pricing** panel (it appears when billing is on for your company):

- **Labor rate ($/hr)** — the starting default is $93/hr until you set your own.
- **Materials markup (%)** — added on top of materials cost (default 0%).
- **Equipment markup (%)** — added on top of equipment cost (default 0%).

Click **Save T&M pricing**. These are **your company's** numbers — set them to your real terms. Subcontractor and other direct costs bill at cost. As the save message says, new drafts use the new numbers: rates apply to bills figured after they are set, and a bill that has already been submitted never changes. Demo Electric Co. uses $125/hr, 15% on materials, and 10% on equipment — the rates in this chapter's example.



The Time & Materials Pricing panel in Settings, at Demo Electric Co.'s rates: labor $125/hr, materials markup 15%, equipment markup 10%.

Step 2 — Create the job as T&M

In the New Job wizard, choose **Time & materials** as the billing method, and set the **Not-to-exceed cap (optional)** if the job has one (Chapter 6).

Step 3 — Record the work

Record costs as they happen (Chapter 8), with real labor hours, materials, equipment, and other costs — and **write the work descriptions**. On a T&M invoice, the descriptions become the **work performed** list, printed in date order. "Replaced failed contactor in MCC-2" sells the bill; "service call" does not.

Step 4 — Open the billing cycle and settle the T&M proof question

In **Billing & A/R**, open the T&M job's billing cycle. The cycle panel has tabs — **Next action**, **Evidence**, and **history** — and the Next action tab starts by asking you to **choose one T&M path for this cycle**:

- **T&M proof required** — the customer wants backup. Attach the supporting documents (time records, material invoices) under the **Evidence** tab, then, in the **Verify T&M proof** card, click **Verify T&M**.

- **No T&M proof required** — the customer doesn't need time sheets or receipts. In the panel headed **No T&M proof required**, type a reason in the **Reason no T&M is required** field (for example "Customer accepts summary billing per contract") and click **Record no T&M required** — the button becomes available once a reason is typed. Recording the skip waives **both** later document steps: no internal draft and no proof-of-sending document are required at either submit step (Steps 7 and 10 below).

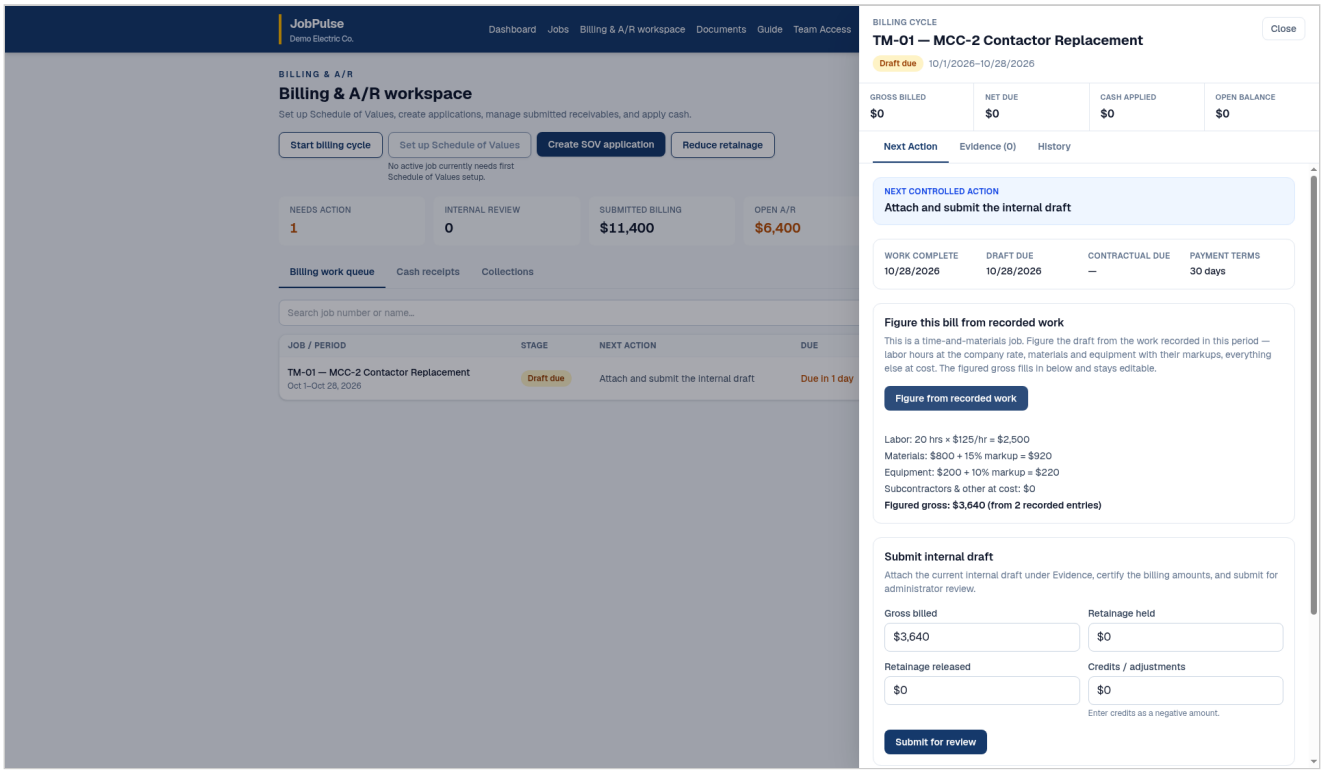
Whichever path you choose, the recorded choice is respected all the way through submission — a recorded skip is never re-demanded later.

Step 5 — Figure the bill from the recorded work

In the **Open progress-billing draft** card, click **Open draft**, then click **Figure from recorded work**. Job Pulse totals the period's recorded entries and prices them at your company rates:

- Labor hours × labor rate.
- Materials + your materials markup.
- Equipment + your equipment markup.
- Subcontractor and other direct costs at cost.

At Demo Electric Co.'s rates, a small cycle with 20 labor hours, $800 of materials, and $200 of equipment figures to: 20 × $125 = $2,500, plus $800 + 15% = $920, plus $200 + 10% = $220 — **Gross billed $3,640**. The breakdown is shown so you can check it, and its result fills the **Gross billed** amount. The figured amount is a starting point — you can edit it before submitting. Check the period dates before figuring; the figure covers entries inside the period.



Figuring TM-01's bill from recorded work: 20 hours × $125 = $2,500 labor, $800 of materials + 15% = $920, $200 of equipment + 10% = $220 — figured gross $3,640, filled into Gross billed, ready to submit.

Two things to know. (1) The figured amount stays in the form while you attach documents. It's normal for the header at the top to show **$0** until you submit; the form amount is the real one. (2) The amount isn't saved until you submit, so **figure and submit in one sitting** — attach any documents your path requires first. If you leave and come back, click **Figure from recorded work** again.

Step 6 — Watch the cap

If the job has a not-to-exceed cap and this bill would push **total billed** past it, Job Pulse shows a **cap warning** at submission, spelling out how far over the cap the bill lands. You can still submit — the cap is a warning, not a block — but deal with it deliberately (bill as-is with the customer's agreement, or adjust) rather than clicking past it.

Step 7 — Attach the internal draft (unless you skipped proof)

Under the cycle's **Evidence** tab, attach your **internal draft** of the bill — that document is what lets you submit in the next step. **If you recorded the No T&M proof required skip in Step 4, this step is waived:** no internal draft is required.

Step 8 — Submit the internal draft

In the **Submit internal draft** card, click **Submit for review** and confirm with **Submit draft for review**. (The form also carries **Retainage held**, **Retainage released**, and **Credits / adjustments** if they apply.) Submitting creates the cycle's official invoice: its number is assigned and its breakdown is frozen at this moment, exactly as figured.

Step 9 — Send the bill to the customer

Download the official invoice — **Download T&M invoice (PDF)** is available from this point — and send that PDF to the customer. It is the bill of record: it carries the cycle's invoice number and the breakdown frozen at submission, so what the customer receives is exactly what will be posted.

Step 10 — Post the external submission (administrator)

An administrator finishes the cycle:

1. Under the **Evidence** tab, attach the **external submission evidence** — proof the bill went to the customer (the sent email, a portal confirmation). **If the No T&M proof required skip was recorded in Step 4, this document is waived too.**
2. Complete **Review and post external submission**: enter the **External submission date** — the day the bill was actually sent (it starts as today; change it if you sent it earlier) — and confirm the **Payment terms (days)**; the **Use company default** button fills in your company's standard terms. The **Contractual due date** fills in automatically as the submission date plus the terms, and you can adjust it before clicking **Record external submission**.

From posting, the bill behaves like any other money owed: it ages, and cash is applied to it in Cash receipts (Chapter 13).

Step 11 — The invoice on file

The invoice you downloaded in Step 9 stays available in the **Receivable status** panel (**Download T&M invoice (PDF)**) for the life of the cycle. The invoice shows:

- **Your company's name** as the contractor.
- The **bill-to customer** (the job's customer).
- An **invoice number** — the same number shown on the billing screen for that cycle.
- The **work performed** list, in date order, from your cost-entry descriptions.
- The amount and the due date.

You can re-download the invoice any time — downloading again gives you another copy; it doesn't start a new bill.

[SCREENSHOT PENDING: A T&M invoice PDF — contractor name, bill-to, invoice number, and the dated work-performed list. Captured when the demo T&M cycle is submitted during the tutorial-video session.]

> **Good to know:** you can re-download the invoice any time. Every copy prints the exact rates and lines used when the bill was submitted, so it always matches its total, even if you change your rates later.

17. The job page and the Job billing tab

A job's page gathers everything about the job:

- **Profitability** — Known vs. Projected margin, scope variance, and the dated percent-complete history (Chapter 9).
- **Cost tracking** — entries, corrections, and the cost list with descriptions (Chapter 8).
- **Change orders** — the CO list and their stages (Chapter 10).
- **Job billing** — the job's billing picture (below).
- **Documents** — the job's documents (Chapter 18).
- **PM & history** — assignments and the job's history.

The Job billing tab

The Job billing tab shows, for that one job:

- The three summary cards — **Gross billed**, **Retainage held**, and **Net billed** — reflecting the job's issued pay apps (for SOV jobs, these are the SOV totals, the same figures the Billing & A/R views use).
- The job's **Schedule of Values applications**: each pay app with its number, period, status (including **Partially paid**), gross / retainage / net, payments applied, and open balance.
- The **payments applied** to the job's bills.

If a job has never been billed, the tab says so plainly ("No pay applications entered"). Creating pay apps happens in Billing & A/R (Chapter 11) — this tab is where you review them in job context.

18. Documents

The **Documents** library holds the company's files, each linked to a job.

Uploading

- Upload one file or several at a time: **Select documents**, or drag files onto the drop area.
- Files can only be linked to **active** jobs.

- Give each a **type** — Estimate / Proposal, Invoice, Change Order, AIA Pay App, Photo / Progress, or Other — and optionally a document number, date, and amount.
- Files over **15 MB** are rejected, as are unsupported formats (PDF, Office, CSV, text, and image files are accepted) and invalid dates or amounts.

Documents uploaded inside a billing cycle (for example, T&M proof) are linked there as well and count toward that cycle's requirements.

Finding and using documents

Search by filename, document number, job number, job name, or type; filter by job or type; or switch to **All document history** to include documents on completed and archived jobs. Click a filename to download it, or jump to the job it belongs to.

Deleting

Deleting asks for confirmation. A document that is **linked to financial records cannot be deleted** — if you try, the message tells you how many financial records to unlink first ("Unlink this document from N financial record(s) before deleting it"). Resolve those links first; do not expect to remove evidence out from under billing.

19. Reports and exports

Reports is the company's reporting home (administrators, and anyone with report permission). If your company bills through Job Pulse, Reports works — a billing-enabled company gets its full reporting, including receivables aging.

Reports is on the main menu — it appears when you are an administrator (or have report permission) in a company with billing turned on. If you don't see it, an administrator can check your access.

Reports is **one scrolling page**, titled "Billing, cash, and job performance" — there are no separate report screens to switch between. Check the **as-of date** shown on the page before you quote any figure. Working down the page:

- **What is billed, due, and collectible** — **Open A/R**, **Cash Received**, **Net Billed** (with a line under it showing how much retainage is currently held — on D-101 after the August pay app, it reads "$600 retainage currently held"), and **DSO** (days sales outstanding): roughly how many days of billing are still unpaid. Lower is better.
- **Contractual-due-date aging** — open A/R in buckets: **Current / not due, 1–30 days, 31–60 days, 61–90 days, and Over 90 days**. Aging runs from each bill's **contractual due date** — not from when the bill was created — so a fresh bill is Current until its terms run out.

- **Conversion and follow-through** — cash application rate, **kept-promise rate** (the share of payment promises customers kept), average internal review time, and aged A/R reduction.
- **Management exceptions** — items needing cleanup or follow-up, flagged as **Missing due date**, **Closed with open A/R**, or **Unallocated cash**.
- **Profitability and funded position** — active jobs, contract value, actual cost, and projected profit across the company. **Funded position** is each active job's **Cash position**: the payments allocated to that job's bills minus the job's total recorded cost. A negative figure means the job has cost more than it has collected so far — money the job still needs.
- **Tables** — **Receivables detail** (the bills behind the totals, with open balances: net due less cash applied), the **Active job portfolio** (per-job figures; click a row to open the job), and **Archived job history**.

Voided records are excluded throughout.

MANAGEMENT REPORTING

Billing, cash, and job performance

Ledger-backed receivables and cash controls combined with current job profitability. Financial values are company-scoped and exclude voided records.

How to read this page

As of Oct 29, 2026 · Generated 10/29/2026, 8:40:24 AM

PERIOD START 08/01/2026 PERIOD END 10/29/2026 Apply

RECEIVABLES CONTROL

What is billed, due, and collectible

Open A/R is normalized net due less active cash allocations. Aging begins at the contractual due date, not the invoice creation date.

OPEN A/R	CASH RECEIVED	NET BILLED	DSO
$6,400	$5,000	$11,400	50.5 days
$6,400 past due	$0 unallocated	$600 retainage currently held	Based on 90-day credit sales

A/R AGING

Contractual-due-date aging

Current includes balances not yet due. Past-due buckets begin one day after the contractual due date.

CURRENT / NOT DUE	1–30 DAYS	31–60 DAYS	61–90 DAYS	OVER 90 DAYS
$0	$6,400	$0	$0	$0

BILLING OPERATIONS

Conversion and follow-through

Period KPIs use the selected reporting dates. A dash means the period has no eligible denominator, not a zero result.

CASH APPLICATION RATE	KEPT-PROMISE RATE	AVERAGE INTERNAL REVIEW	AGED A/R REDUCTION
100%	—	—	-$6,400
$5,000 of $5,000 period receipts applied	0 kept of 0 resolved promises due	0 externally submitted cycles	$0 opening · $6,400 closing

Management exceptions

Items requiring administrative cleanup or explicit follow-up.

MISSING DUE DATE	CLOSED WITH OPEN A/R	UNALLOCATED CASH
0 · $0	0 · $0	$0

JOB ECONOMICS

Profitability and funded position

Profitability retains JobPulse cost records. Cash position uses normalized cash allocated to each job less recorded actual cost.

ACTIVE JOBS	CONTRACT VALUE	ACTUAL COST	PROJECTED PROFIT
2	$113,640	$1,000	$25,640
		$87,000 estimated	22.6% margin on jobs with recorded progress

Estimate-rate labor included. 20 unpriced labor hours are valued at the bid rate, contributing $0 to the displayed actual-cost and profitability figures. This portion is not recorded labor cost.

Receivables detail

Every posted or administratively closed billing cycle, including paid cycles, reconciles net due to active cash allocations.

Export receivables CSV

JOB	APPLICATION / PERIOD	STAGE	DUE	NET DUE	ALLOCATED	OPEN A/R	AGE
D-101 Riverside Clinic Fit-out	App 1 Period ending Aug 31, 2026	Partially Paid	Sep 30, 2026	$11,400	$5,000	$6,400	29d

Active job portfolio

Job-level profitability, normalized billing, cash allocations, open A/R, and current funded position.

Export jobs CSV

JOB	ACTUAL COST	LINKED INVOICE EVIDENCE	NET BILLED	CASH ALLOCATED	OPEN A/R	CASH POSITION	PROJECTED MARGIN	STATUS
D-101 Riverside Clinic Fit-out	$0	$0	$11,400	$5,000	$6,400	$5,000	20.9%	on track Budget spent 0.0%
TM-01 MCC-2 Contactor Replacement	$1,000	$0	$0	$0	$0	-$1,000	72.5%	on track Budget spent 0.0%

Current cash-need jobs · 1

Jobs where normalized cash allocations remain below recorded actual cost. This is a current funded-position indicator, not a bank-balance forecast.

JOB	ACTUAL COST	LINKED INVOICE EVIDENCE	NET BILLED	CASH ALLOCATED	OPEN A/R	CASH POSITION	PROJECTED MARGIN	STATUS
TM-01 MCC-2 Contactor Replacement	$1,000	$0	$0	$0	$0	-$1,000	72.5%	on track Budget spent 0.0%

Archived job history

Read-only closed-job records are excluded from active portfolio totals.

JOB	PM	REASON	ARCHIVED	NOTES
D-101 Riverside Clinic Fit-out	PM 0	Finished	Oct 29, 2026	—

The Reports page: open A/R $6,400, cash received $5,000, and net billed $11,400. Further down, contract value is $113,640 and projected profit is $25,640 — a 22.6% margin on the same contract basis. The two CSV exports are covered under Exporting, below.

Exporting

Reports has exactly **two** spreadsheet exports, both administrator-only:

- **Export receivables CSV** — the receivables detail as a spreadsheet file.
- **Export jobs CSV** — the job list as a spreadsheet file. Its Contract Value column uses the same basis as the Reports page: the contract with executed change orders included.

The date is in the CSV's **file name** only — note the period and as-of date yourself when you share one. Pay apps export as PDFs from the pay app itself (Chapter 11), and T&M invoices as PDFs from their billing cycle (Chapter 16).

20. Everyday checks

A short checklist that prevents most billing problems:

1. **Right company, right role.** Check the header and Settings — your name, role, and company — before working in someone else's numbers.
2. **Costs before billing.** Record the period's costs (with descriptions) before figuring or previewing a bill that depends on them.
3. **Percent complete is current.** Update it when you enter costs; do not let the out-of-date reminder sit.
4. **Change orders in order.** Pending → Submitted → Approved → Signed → Executed — and double-check the **executed date**, because it decides which pay app the CO lands on.
5. **Preview = final.** If the preview of a pay app is wrong, fix the inputs — never issue and hope. The issued figures are frozen.
6. **Post what you send.** A pay app is not money owed until you record its sent date and terms. Unposted pay apps do not age and cannot receive cash.
7. **Apply cash promptly.** Unallocated receipts do not reduce anyone's balance. Check for idle receipts in the reminders.
8. **One promise at a time.** Resolve an open promise before recording the next.
9. **Documents attached before you need them.** T&M proof and closeout paperwork are easier gathered during the period than reconstructed after it.
10. **Quotes come from Reports, with dates attached.** Always note the period and as-of date when you pass a figure along.

21. Glossary

- **Accounts receivable (A/R)** — money customers owe you: posted bills that haven't been paid yet.
- **Aging** — how late open bills are, grouped in buckets (Current, 1–30, 31–60, 61–90, Over 90 days) and counted from each bill's due date.
- **Application for Payment (pay app)** — the periodic bill on a quoted-price job, in the standard G702/G703 layout. Job Pulse's version is a working equivalent in that layout.
- **Billing cycle** — one period's billing pass for a job, tracked as a single record that moves through its stages. A pay app is the document one cycle produces on a quoted-price job; a T&M bill is what a cycle produces on a T&M job.
- **Change order (CO)** — a tracked change to the contract: Pending → Submitted → Approved → Signed → Executed (or Rejected). Signed moves profitability; Executed moves billing.
- **Company workspace** — your company's private area of Job Pulse: its jobs, people, and money, invisible to every other company.
- **Continuation sheet (G703)** — the line-by-line detail behind a pay app.
- **Correction** — the way cost history is fixed: original entry + exact reversal + replacement + reason, all kept.
- **Current Margin (Known)** — margin from confirmed facts only.
- **Executed date** — the date a change order was executed. Decides which pay app's period includes the CO.
- **G702** — the summary page of a pay app (contract sums, earned, retainage, amount due, balance to finish).
- **Issued** — a pay app that has its number and frozen figures. See also **Posted**.
- **Not-to-exceed (NTE) cap** — a T&M job's maximum total billing; Job Pulse warns before a bill would pass it.
- **Open balance / Open A/R** — amount due less cash applied, never below zero.
- **Partially paid** — a posted bill with some, but not all, of its amount covered by applied cash.
- **Payment promise** — a customer's recorded commitment to pay a stated amount by a stated date; one open promise per bill.
- **Platform administrator** — the role that runs Job Pulse itself: creates companies and controls per-company billing switches. Distinct from a company Administrator.
- **Posted** — a pay app whose sent date has been recorded; from that moment it counts as money owed (A/R), ages from its due date, and can receive cash.
- **Profit fade** — margin slipping away while a job runs: Projected Margin drifting below the margin you estimated.
- **Projected Margin** — margin including the forecast cost to finish.
- **Retainage** — the percentage of each billing held back until the contract allows its release.
- **Schedule of Values (SOV)** — the contract's billed line items; must total exactly the contract amount to activate.

- **Scope** — a named part of a job used for estimating and, optionally, cost tracking. **Scope vs SOV line:** scopes are how you track cost; SOV lines are how the customer sees your bill. They don't have to match.
- **Setup link / reset link** — a private, one-time link used to set a password. Setup links last 7 days; reset links 30 minutes.
- **Stored materials** — materials bought and on site but not yet installed. They can be billed before installation and carry their own retainage rate.
- **T&M (time & materials)** — a billing method that charges for the work actually recorded: hours at the company's labor rate, materials and equipment with the company's markups.
- **Unpriced labor** — labor hours recorded without an actual labor cost; valued at the estimate rate for display, and labeled as such.

Appendix: Roles in detail

Role	What they can do
Platform administrator	Runs Job Pulse itself. Creates companies, turns billing on or off per company, and sends or re-sends owner setup links. Only the platform administrator sees the Company workspaces list — the list of all companies on the system.
Administrator (company)	Runs one company. Sees all of that company's jobs, billing, cash receipts, collections, and reports, and manages that company's team in Team Access.
Project Manager (PM)	Works only the jobs assigned to their PM code. A PM sees and works their own jobs — costs, change orders, pay applications on those jobs — but does not see company cash receipts or collections.

A note for owners: you are an Administrator of your own company. You do **not** see the Company workspaces list, other companies' names, or any other company's staff. If you own a company and you can see a list of other companies, report it to Job Pulse support at support@jobpulsenow.com — that is not how your account should look.