

## JOBPOWER & DocumentVision Enhancements – Versions 9.200 & Cloud 11.200 6/4/2021

### General

- User Interface *Improved*  
General enhancements

- Certain menu options that would open full screen now open embedded normal size. You can maximize as before to your preference.
- We no longer accept support requests via our fax number. Please send us application runtime errors or screenshots via email [jpsupport@jobpow.com](mailto:jpsupport@jobpow.com).

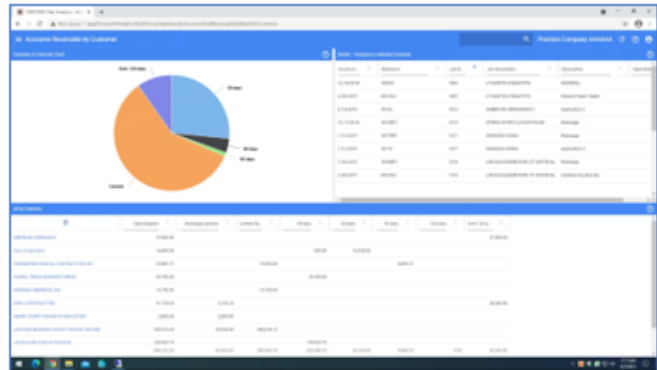
### Analytics / Reports

- JPAnalytics *New Feature*  
Contact **JOBPOWER** Sales to learn more via phone **800-776-6556 x1**; or Email [sales@jobpow.com](mailto:sales@jobpow.com)

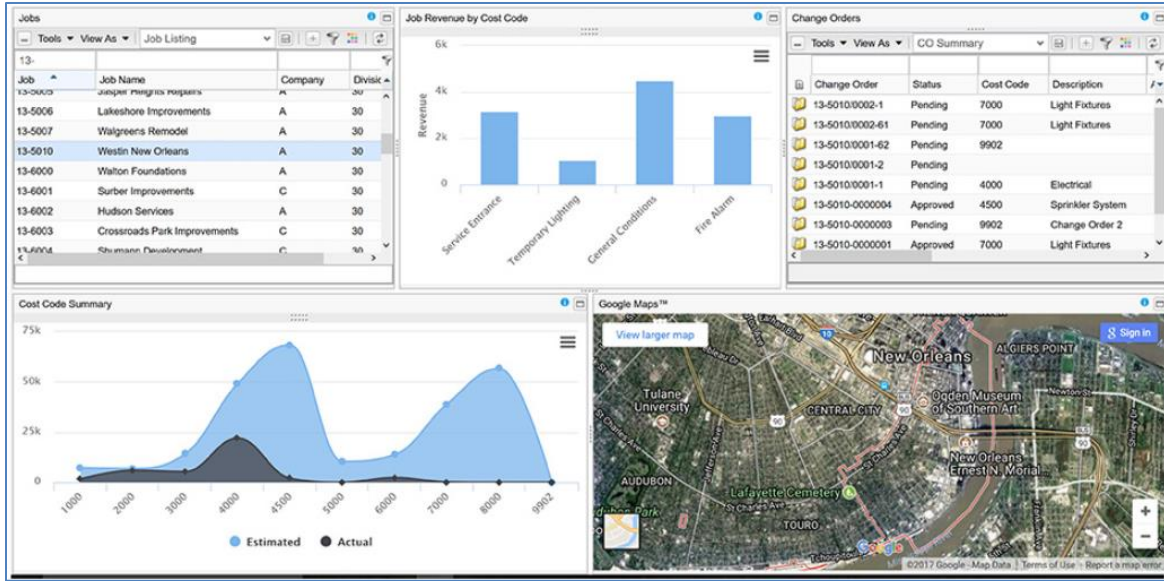
Introducing our NEW module - **JPAnalytics**. Analyze, visually explore your Accounting and Job Costing data. Ask questions, get answers. We include readymade inquiries that mirror existing **JOBPOWER** Reports, so you get immediate insights into your data in a modern interface. You can also use our easy-to-use designer to author your own dashboards (mix different data visualizations – inquiries, grids, charts). Inquiries can be exported to Excel, PDF, or CSV to create professional reports to be printed or shared as PDF.

Readymade data sets (**inquiries**) available to query include ...

- Dashboards
  - Accounts Receivable by Customer
  - Accounts Receivable by Job
  - Accounts Payable by Vendor
  - Accounts Payable by Job
- Financial Reports
  - Account Transaction History
  - Trial Balance
  - Bank Balance History
  - Check Register
  - Cash Receipts
  - Job Over/Under Billings
- Job Management
  - Job Budget
  - Job Change Orders
  - Job Purchases
  - Job Cost History
  - Job Budget versus Actual
  - Job & Vendor Payments
  - Job Lien Waivers
  - Job List
  - Cost Categories & Divisions
- Customers / Billings
  - Accounts Receivable
  - Customers
  - Billing Status
- Vendors / Payables
  - Accounts Payable
  - Vendors

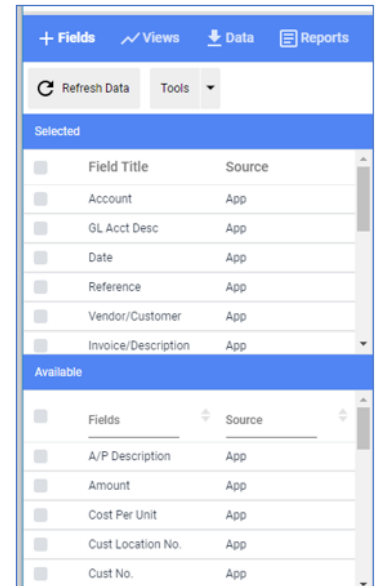


- Vendor Activity

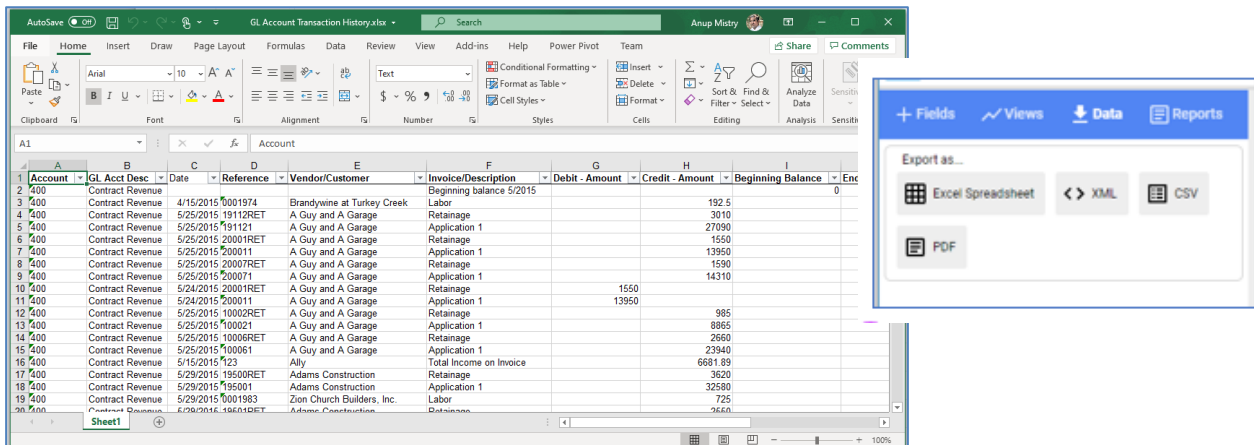


Analytics features include ...

- Uses same credentials that you can set up and control using the JOBPOWER Password program.
- Each dataset can be queried from your Web Browser.
- Within each **inquiry** you can decide which columns you want to see.
- We include readymade pre-setup grid layouts in each inquiry. Each Grid can have multiple Views. Each View can have Columns of your choice.
- You can build an inquiry report once; then perfect it over time.
- You can build professional Word Style layouts using Microsoft Word®.
- Drill-down from one inquiry to the other.
- Inquiries like Job Cost History see different levels in tabs (Detail, Cost Category Summary, Division Summary, etc.).
- Excel Export of any grid view does not require any extra effort and can export large number of records.



If you have our 'Data Warehouse' feature in prior JOBPOWER releases, you will now see newer available datasets as well. Contact JOBPOWER Support to learn more how to use these new Job Management/Costing related data sets.



## CRM

- Call Maintenance – Custom Fields *New Feature*  
[CRM > Maintenance > Calls > Options tab | Define Custom Fields](#)  
[CRM > Maintenance > Calls > Custom Fields](#)

Ability to define custom Call related fields by Company. You may set up to five text/alpha fields, five date fields, four numeric, four currency and four flag fields. See the chapter [Custom Fields](#) in the Accounting Manual for setting up custom fields. Once the fields have been defined, anyone with access to the maintenance program can update the fields. If a user has full access to JOBPOWER then they will have access to set up user defined fields. There is also a checkbox in security to allow access to 'Define user-defined fields'.

- Call Maintenance *New Feature*  
[CRM > Maintenance > Calls > Add or Revise.](#)  
[CRM > Maintenance > Calls > Options tab](#)
  - JobID field added to Call records allowing you to specify the Job for the Call.
  - You can continue to specify the prospect or customer for the Call record.
  - New user option to set the 'Default Contact Pref'. Example, if you set to email when logging a call the program will require the caller email be included in the Call record. Also added 'None' to 'Default Contact Pref.'. This allows you to save the Call record without any caller contact info (Phone, Mobile, Email).
  - 'Call Type' field is now available in the 'Column Chooser' list.
  - Caller Info (Name, Phone, Mobile, email) is now auto populated from the Prospect or Customer record.
- Call Maintenance and Quote Center – Save/Load Grid Layouts *New Feature*  
[CRM > Maintenance > Calls > Options | Save /Load Grid Layouts \(by user\)](#)

Ability to save and load grid layouts was enabled. The Call grid layout and column chooser options can be very helpful reporting tools. You may add fields, remove fields, rearrange the order of the columns, filter data and group and subgroup records. Any custom fields created will be listed here as well. Each user may save up to five different grid layouts for each company. See the chapter [Save / Load Grid Layouts](#) in the Accounting Manual.

- Quote Center *Improved*  
[CRM > Quotes > Quote Center or Revenue > Quotes and Invoices > Quote Center](#)

Ability to set/view the 'Report Description' field was added to Quotes.

  - Now when creating/revising a Quote you can override the 'Report Description'. Look for it in the 'Job Information' section.
  - Report Description is now available in the 'Column Chooser' list.

## Reports

- Print 1099-MISC, 1099-NEC, 1096 *Updated*  
New option in [Reports > Vendor Reports > 11. Print 1099-NEC](#). Prints to pre-printed forms.
- Job Purchase Orders (Grid) Report *New and Improved*  
[Reports > Job Management Reports > Job Purchases \(Grid\)](#)

The new Grid report is the existing Job Purchases report re-imagined. New features include...

  - Run for multiple jobs.
  - Run for All jobs with additional filter of Job Status (Open, Completed, Closed, Open & Completed) or Job Select Codes.
  - Run for range of Jobs. (Example: 1700-1900)
  - Run for multiple jobs different report sequences such as; Job and Vendor, Job and PO and User defined.
  - Run for range of Vendors. (Example: A-C)
  - Can run for partial Vendor Name.
  - New Report level – Detail without balances. Shows columns seen in Add/ Revise POs.
  - You get all your standard Grid Style reporting including Filtering, Sorting, Grouping, Print Grid then export to Excel or PDF, Expand and Collapse sections.

- Job Subcontract Status (Grid) Report *Improved*  
[Reports > Job Management Reports > Job Subcontract Status \(Grid\)](#)

The Grid report is the existing Job Subcontract Status report re-imagined. Improvements include ...

- Added Vendor related columns to the Grid 'Column Chooser'.
- Vendor Columns – Name, Id, Sort Code, Address, Phone, Fax, Contact Name, Phone, Email and Website.

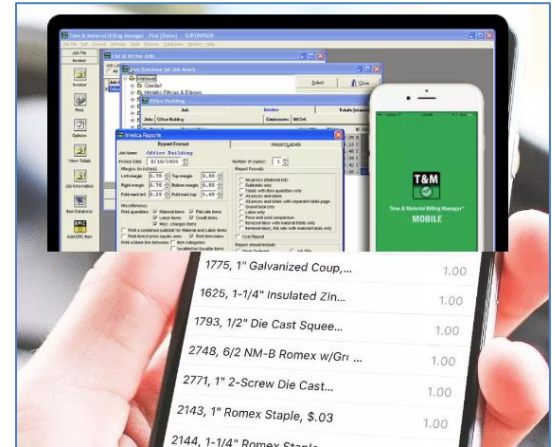
## Revenue

- T&M / Service Billing *New Integration*  
[Revenue > Quotes and Invoices > Vision InfoSoft T&M \(Import invoice\)](#)

Introducing our new partnership with [Vision InfoSoft](#) (A Trusted advisor to the Electrical Industry). JOBPOWER now has deep integration with Vision's Time and Material Billing Manager™ which simplifies your electrical or plumbing service work billing. It includes a custom item database saving you time and integrates with JOBPOWER Accounts Receivable GL.

You will get paid sooner and spend less time managing the billing process. Vision's T&M has a companion mobile app.

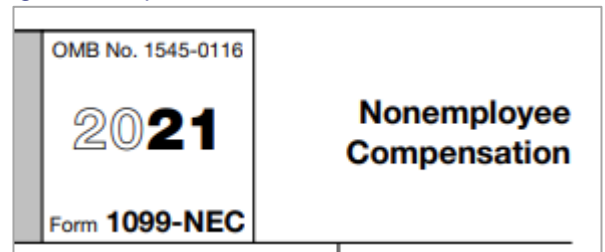
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## Payables/Banking

- Form 1099-NEC *New IRS Filing requirement*  
[Payables/Banking > Maintenance > Vendors > Tab 2 \[1099 / Subcontractor Info\]](#)  
[Payables/Banking > 1099-MISC and 1099-NEC > Vendor Maint 1099 Mode and eFile 1099-MISC/1099-NEC.](#)  
[Reports > Vendor Reports > Print 1099-NEC](#)

- Added support for Form 1099-NEC (Nonemployee Compensation).
- Starting tax year 2020, the IRS has separated the reporting of payments to nonemployees from Form 1099-MISC and redesigned it for tax year 2020. If you pay independent contractors, you may have to file Form 1099-NEC, Nonemployee Compensation, to report payments for services performed for your trade or business. Non-employee compensation was previously included on the 1099-MISC form. The IRS offers detailed instructions and information about both forms on its website. <https://www.irs.gov/forms-pubs/about-form-1099-NEC>
- New convert wizard that easily converts your 1099-MISC Box 7 Vendors to 1099-NEC – 'Yes'.
- Added support for eFile. Use option **Payables/Banking > 1099-MISC and 1099-NEC > eFile 1099-MISC/1099-NEC > Ready to eFile 1099-MISC/1099-NEC**.
- Added support for Print to pre-printed forms.
- Updated JOBPOWER Form 1099-MISC and 1099-NEC eFile documentation.
- When adding/revising a vendor if the user sets the **[Box on 1099-MISC]** to "YES", now it requires the user to specify the **[Box on 1099-MISC]** field. Earlier this field was optional.



- Form 1096 *Updated*  
[Reports > Vendor Reports > Print 1096 form](#)

Added support for Form 1099-NEC (Nonemployee Compensation) to the Form 1096.

- ACH Vendor Payments (Payment Center) *New Feature*  
[Payables/Banking > Checks Menu > Payment Center](#)

Payment Center gives you the ability to select payable vouchers and save them as a batch. Then you can select the batch to print a group of checks. You can assign pay priorities to vendors. You can filter by job and/or vendor, sort by date, and much more. Once you are ready, you can create a NACHA file and upload to your online bank website/portal or print to paper checks. You can also do a 'record only'.

Using the **Payment Center** click the option **Create ACH Batch**, pick your vouchers/vendors to pay and process to create a NACHA file that can be uploaded to your online bank website/portal.

We continue to support payment Vendor invoices via paper checks or credit cards (Non-Check Deducts).

- Payment Center *Improved*  
[Payables/Banking > Checks Menu > Payment Center](#)

- When using the Payment Center to print paper checks you now have a retry option. Avoids having to reverse a check batch for a failed print or printer issue.
- Certain old unpaid vouchers would be missing on the payment selection screen in certain scenarios. This issue is now fixed.

## Job Management

- Maintain Jobs - State/County List *Improved*  
[Job Management > Job Tasks > Maintain Jobs.](#)

- Field County on Tab 2 (Other Info) now has a list of valid counties.
- When selecting the State, example GA, it will fill the County drop-down with all of Georgia's counties.

- Print Subcontracts *Improved*  
[Job Management > Subcontracts > Print subcontracts](#)

- When a vendor is Picked, Added or Revised the code now checks the Vendor Record for WCI and Liability Expiration dates. If expired, it shows warning message - *The vendor file shows a WCI insurance expiration date of x/xx/xx for this subcontractor and/or the vendor file shows a liability insurance expiration date of x/xx/xx for this subcontractor.*

Note: This is just a warning; you can continue to Print the Subcontract and then later get the updated dates from the Subcontractor to input into JOBPOWER.

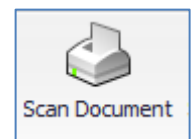
- Change Orders *Improved*  
[Job Management > Change Orders > View change orders](#)

Fixes issue where a Change Order Amount seen would not be correct. This would occur if the Subcontract CO Amount was changed to zero after entering the Subcontract CO.

## Document Management

- DocumentVision *Improved*  
[Document Management > Scan Document](#)

Scanning related user interface changes were made. Now the program will remember your last used scanner, hide the ribbon form during scanning and general improvements to the user interface.



## Payroll

- Form W-2, W-3 *Updated*  
[Payroll > W-2/ACA Reporting](#)

Better alignment to pre-printed forms for tax year 2020.

- 941 Form *Updated*

[Payroll > Government Reports > Quarterly 941/Sch B](#)

Includes programming changes and updated IRS Form 941 for tax years 2020 4<sup>th</sup> quarter and 2021 1<sup>st</sup> quarter.

- Form 1095 (ACA /Health Coverage) *Updated*

[Payroll > W-2/ACA Reporting > Enter data for 1095B/1095C](#)

[Payroll > W-2/ACA Reporting > eFile W-2/ACA Forms > eFile 1095B/1095C](#)

Updates as per IRS for tax year 2020:

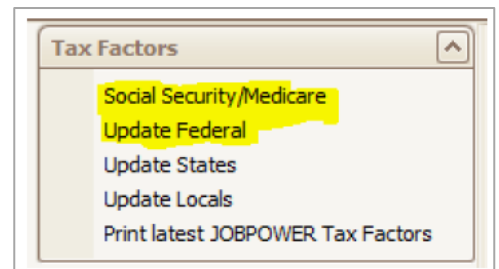
- 1095-C: Plan Start Month is now required.
- 1095-C: Added new offer of coverage codes [1L, 1M, 1N, 1O, 1P, 1Q, 1R, 1S]
- 1095-C: Added Employee Age; Added Zip Code as Line 17
- Zip Code is auto populated from Employee Record.
- If Offer Codes are 1R or 1S then do not include the 0.00 amount in the data that gets sent to eFile Provider. This would generate a Transmit error.

- Tax Factors for 2021 *Updated*

[Payroll > Tax Factors](#)

This update includes the latest Social Security Maximum Wage Base and the Federal Tax Withholding Brackets for 2021.

- Revised Federal Tax Factors for 2021
- Includes updated 2021 State Tax Tables for AR, CA, CO, IL, IA, KY, ME, MI, MS, MO, NM, NY, ND, OR, RI, SC, VT
- Revised 2021 Local Tax Tables for CA, NJ, NY, WA



Users must manually update their tax factors for existing companies in JOBPOWER. These will ONLY be used automatically for new companies that are started in JOBPOWER after installing this update.

Option to update your tax factors in **Payroll > Tax Factors > Update Federal** or **Update States** or **Update Locals**. To print the latest published **Payroll > Tax Factors > Print latest JOBPOWER Tax Factors**.

- Generate Colorado State Quarterly Unemployment Wage *Updated*

[Payroll > Government Reports > Generate Quarterly State Wage \(UE\) File](#)

- Change the exported file contents as per new Colorado State requirements effective January 2021. <https://cdle.colorado.gov/sites/cdle/files/documents/WageFTPInstructions.pdf>
- File has Company Record and Employee Records.
- Company Record no change.
- Employee Record Box 215-220 change from MMYYYY to YYYYQQ (MM - Ending Month of the Quarter 03, 06, 09, 12 and QQ - Quarter # 01, 02, 03, 04).

- Generate Illinois State Payroll CSV Export (Sch-P – 941 Quarterly) *New Feature*

[Payroll > Government Reports > Generate Quarterly State 941/Sch P](#)

- New CSV Export option as per Illinois IL specs. <https://www2.illinois.gov/rev/forms/withholding/Documents/currentyear/IL-941-Schedule-P-CSV-Instr.pdf>
- Added new menu option **Payroll Reports > Government Reports > Generate Quarterly State 941/SchP**.
- Exported CSV is created in your JPReport Folder.
- CSV file-name pattern is SchP\_Qtr\_SS\_MM\_YYYY\_CCC.csv (SS is IL, MM\_YYYY is ending period example 06-2020, CC is JOBPOWER Company # example 07).
- Contact JOBPOWER Sales to learn more via Phone **800-776-6556 x1**; Email [sales@jobpow.com](mailto:sales@jobpow.com); or online chat at [www.jobpow.com](http://www.jobpow.com).

- Employee Pay Stub *Updated*

[Payroll > Prepare Payroll > Print Pay Checks or Print Direct Deposit Vouchers](#)

Employees pay stub (voucher) would show 'Overtime' amounts categorized as 'Other'. This is now corrected.

- **Employee Long Notes Report** *Improved*  
[Payroll > Employees > Employee Long Notes](#)

Added search criteria fields Status (Active/Terminated) and Work Class. This change allows you to print the Employee Roster and the Employee Long Notes for the same set of Employees.

- **Prepare Payroll** *Improved*  
[Payroll > Prepare Payroll > Start New Payroll or Revise Unapproved Payroll](#)

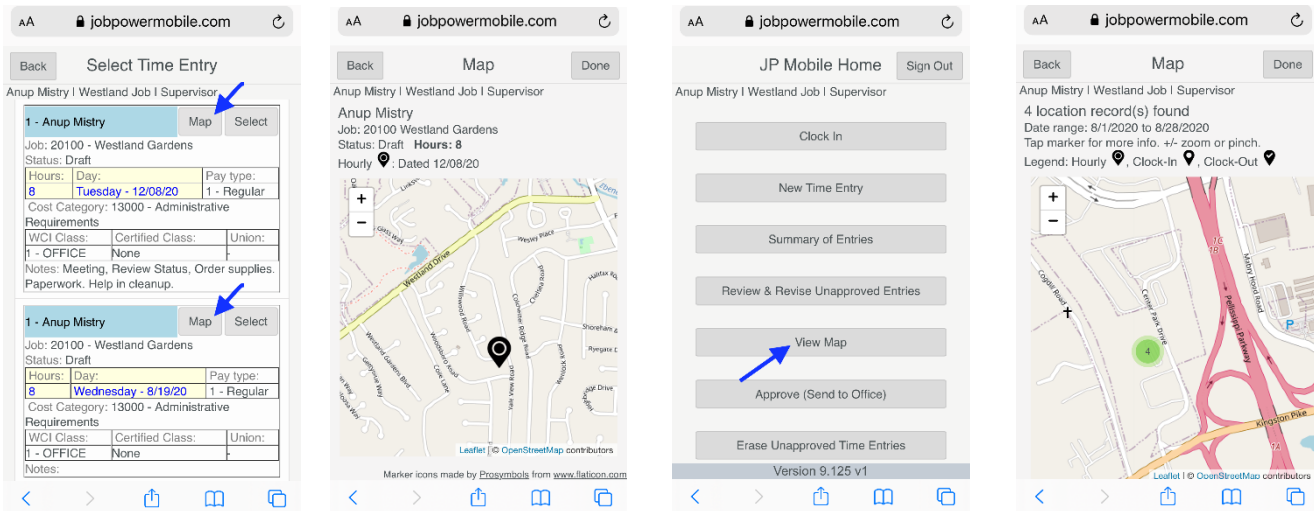
If the Employees Federal Withholding amount is negative, then program will show a warning prompt (*Federal Withholding amount [\$xxx.xx] should not be negative unless you are making a payroll correction. For example: Reversing a Payroll. Make sure you have entered the correct tax information for this employee. Otherwise, you will need to adjust the negative amount to be \$0.00 before continuing.*) when the **[OK Employee]** button is clicked in the **Prepare/Revise Employee** screen. This avoids incorrect W2 amounts.

- **Email Direct Deposit Vouchers** *Updated*  
[Payroll > Prepare Payroll > Print Direct Deposit Vouchers | Specification's tab | Set up Email](#)

Added ability such that the Senders Email Address can be different than outgoing User Name Email address.

- **JPMobile Remote Payroll Timekeeping Module** *Updated*

JPMobile now includes Real Time Map and GPS Tracking functionality. You can easily see accurately where your employees are at upon clock in and clock out from job sites.



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