

## Job Costs - Budget

To add the budget to a job, navigate to the job using your preferred search method; within the Job Detail page click on the Financials tab.

**Job Name:** Water/Laundry Room
**Job #:** 19-106H20
**Job Progress** WA/Contract Signed
**Loss Type:** Water Damage

**XA Job Type:**

**Ashley Smith, Owner** 303-800-5182 - Cell [dawn@servicesoftwareinc.com](mailto:dawn@servicesoftwareinc.com), [dbryant@verisk.com](mailto:dbryant@verisk.com)

**Kaden Smith, Owner** 219-111-1111 - Cell

12450 North Meridian Street, Carmel, IN 46032

**Tasks:** 10 **Incomplete:** 8 **Due Today:** 0 **Overdue:** 8 **Future:** 0

**Documents:** 2

**Correspondence:** 8

**WOs:** 1 **Open:** 1 **Due Today:** 0 **Overdue:** 0 **Review:** 0 **Repair:** 0

**Equipment:** **Out:** 0 **Returned:** Total: 0

**Referred By** Adjuster  
**Adjuster** Chip Studebaker (McCraw Adjusters)  
**Agent** Renae Bradley (Dawn's Rockin' Agency)  
**Source of Referral** Joe Smith (Allstate)  
**Property Manager** Jax Property Mgmt (\*Jacksonville Property Mgmt)

Job Snapshot

Detail

Job Contacts (2)

Additional Contacts (4)

Losses (1)

Schedules (2)

Tasks (10)

Subs/Techs

Financials\*\*

Correspondence (8)

Documents & Pics (2)

Document Merge

Inspections

Moisture Readings (1)

Equipment

Change Log

Create WOs

Click anywhere on the row to expand.

Loss Type	Loss Number	Estimate	Actual Exp	Gross Profit	GP%	
Water Damage		\$2,744.88	\$582.06	\$2,162.82	78.79%	
Loss Type: <span style="color: #2c3e50;">Water Damage</span>						
		<b>Estimate</b>	<b>Budget</b>	<b>Actual Exp</b>	<b>Budget to Actual Exp</b>	<b>Gross Profit</b>
				\$	%	<b>Budget</b> <b>Actual Exp</b>
*Click on the amount to see or edit the line items.		Materials	\$0.00	\$0.00	\$0.00	100.00%   100.00%
		Labor	\$0.00	\$0.00	\$0.00	100.00%   100.00%
		Tech/Sub	\$0.00	\$582.06	-\$582.06	100.00%   29.81%
		Labor Burden %	\$0.00	\$0.00	\$0.00	100.00%   100.00%
		Tech/Sub Burden %	\$0.00	\$0.00	\$0.00	100.00%   100.00%
		Equipment	\$0.00	\$0.00	\$0.00	100.00%   100.00%
		Other/Mileage	\$0.00	\$0.00	\$0.00	100.00%   100.00%
		<b>Total</b>	<b>\$2,744.88</b>	<b>\$582.06</b>	<b>-\$582.06</b>	<b>100.00%   78.79%</b>
		<u>Estimate Breakdown</u>				
	Last Line Item	02/24/2019	02/24/2019	02/21/2019		

The Budget can be applied two (2) ways, decide which option will best suite your Company.

## Job Costs - Budget

### Option 1 - Override Budget:

If you want to stay within a 62% margin then add 38 into the blank % field click the **Override Budget** to apply.








Detail	Job Contacts (2)	Additional Contacts (4)	Losses (1)	Schedules (2)	Tasks (10)	Subs/Techs	Financials**	Correspondence (8)
Documents & Pics (2)	Document Merge	Inspections	Moisture Readings (1)	Equipment	Change Log	Create WOs		
Loss Type	Loss Number	Estimate	Actual Exp	Gross Profit	GP%			
Water Damage		\$2,744.88	\$582.06	\$2,162.82	78.79%			

Loss Type: Water Damage

	Estimate	Budget	Actual Exp	Budget to Actual Exp		Gross Profit		
				\$	%	Budget	Actual Exp	
Materials	\$413.70	\$0.00	\$0.00	\$0.00	100.00%	100.00%		
Labor	\$1,268.14	\$0.00	\$0.00	\$0.00	100.00%	100.00%		
Tech/Sub	\$829.30	\$0.00	\$582.06	\$-582.06	100.00%	29.81%		
Labor Burden %	\$109.04	\$0.00	\$0.00	\$0.00	100.00%	100.00%		
Tech/Sub Burden %	\$0.00	\$0.00	\$0.00	\$0.00				
Equipment	\$102.75	\$0.00	\$0.00	\$0.00	100.00%	100.00%		
Other/Mileage	\$21.95	\$0.00	\$0.00	\$0.00	100.00%	100.00%		
<b>Total</b>	<b>\$2,744.88</b>	<b>\$0.00</b>	<b>\$582.06</b>	<b>\$-582.06</b>	<b>100.00%</b>	<b>78.79%</b>		
<u>Estimate Breakdown</u>								
Last Line Item	02/24/2019	02/24/2019	02/21/2019					

Accounting Breakdown:

Total Budget	\$0.00	Actual Exp to Budget \$	\$582.06	Actual Exp to Budget %	100.00%
<u>Invoiced</u>	\$2,315.58	Invoiced to Actual Exp \$	\$1,733.52	Invoiced to Actual Exp %	74.86%
<u>Payments Rcvd</u>	\$1,000.00	% Complete			0 %
Unpaid Balance	\$1,315.58				

Job Cost Summary      %   

**Override Budget**

After clicking the **Override Budget**, then following confirmation pop-up will display click **OK** to continue.

training.restorationmanager.net says

This will delete and replace the existing Budget.

Are you sure you want to continue?

The page will refresh and the Budget will be created.

Loss Type	Loss Number	Estimate	Actual Exp	Gross Profit	GP%			
Water Damage		\$2,744.88	\$582.06	\$2,162.82	78.79%			

Loss Type: Water Damage

	Estimate	Budget	Actual Exp	Budget to Actual Exp		Gross Profit		
				\$	%	Budget	Actual Exp	
Materials	\$413.70	\$157.21	\$0.00	\$157.21	0.00%	61.99%	100.00%	
Labor	\$1,268.14	\$481.90	\$0.00	\$481.90	0.00%	61.99%	100.00%	
Tech/Sub	\$829.30	\$315.13	\$582.06	\$-266.93	184.70%	62.00%	29.81%	
Labor Burden %	\$109.04	\$41.44	\$0.00	\$41.44	0.00%	61.99%	100.00%	
Tech/Sub Burden %	\$0.00	\$0.00	\$0.00	\$0.00				
Equipment	\$102.75	\$39.05	\$0.00	\$39.05	0.00%	61.99%	100.00%	
Other/Mileage	\$21.95	\$8.34	\$0.00	\$8.34	0.00%	62.00%	100.00%	
<b>Total</b>	<b>\$2,744.88</b>	<b>\$1,043.07</b>	<b>\$582.06</b>	<b>\$461.01</b>	<b>55.80%</b>	<b>61.99%</b>	<b>78.79%</b>	
<u>Estimate Breakdown</u>								
Last Line Item	02/24/2019	02/24/2019	02/21/2019					

## Job Costs - Budget

### Make Budget - Option 2:

Simply click the **Make Budget** button to apply the budget.

*Note:* When using the Make Budget button the factors are set up and maintained by your administrator of Restoration Manager.

**Important:** For an overview on how to apply the Budget Factor job please refer to the following reference document **Budget Factor - Setup** available on the University under Training Documents → Administrator.

After clicking **Make Budget**, then following confirmation pop-up will display click **OK** to continue.

training.restorationmanager.net says

This will delete and replace the existing Budget.

Are you sure you want to continue?



The page will refresh. Single click on the cost line to expand and display the details.

Loss Type	Loss Number	Estimate	Actual Exp	Gross Profit	GP%
Water Damage		\$2,744.88	\$582.06	\$2,162.82	78.79%

Loss Type: Water Damage

	Estimate	Budget	Actual Exp	Budget to Actual Exp		Gross Profit	
				\$	%	Budget	Actual Exp
Materials	\$413.70	\$106.71	\$0.00	\$106.71	0.00%	74.20%	100.00%
Labor	\$1,268.14	\$507.25	\$0.00	\$507.25	0.00%	60.00%	100.00%
Tech/Sub	\$829.30	\$331.72	\$582.06	\$-250.34	175.46%	60.00%	29.81%
Labor Burden %	\$109.04	\$43.62	\$0.00	\$43.62	0.00%	59.99%	100.00%
Tech/Sub Burden %	\$0.00	\$0.00	\$0.00	\$0.00			
Equipment	\$102.75	\$0.00	\$0.00	\$0.00		100.00%	100.00%
Other/Mileage	\$21.95	\$0.00	\$0.00	\$0.00		100.00%	100.00%
<b>Total</b>	<b>\$2,744.88</b>	<b>\$989.30</b>	<b>\$582.06</b>	<b>\$407.24</b>	<b>58.83%</b>	<b>63.95%</b>	<b>78.79%</b>

*\*Click on the amount to see or edit the line items.*

Estimate Breakdown  
Last Line Item: 02/24/2019

Within the cost detail page there are two Budget Reports available to Print (canned report), Export to Excel (No header or page breaks), or Print to Excel (Includes header and page breaks).

- Budget by Cost Type
- Budget by Cost Code

Loss Type	Loss Number	Estimate
Water Damage		\$2,744.88

Loss Type: Water Damage

	Estimate	Budget
Materials	\$413.70	\$106.71
Labor	\$1,268.14	\$507.25
Tech/Sub	\$829.30	\$331.72
Labor Burden %	\$109.04	\$43.62
Tech/Sub Burden %	\$0.00	\$0.00
Equipment	\$102.75	\$0.00
Other/Mileage	\$21.95	\$0.00
<b>Total</b>	<b>\$2,744.88</b>	<b>\$989.30</b>

*\*Click on the amount to see or edit the line items.*

- Job Cost Summary
- Job Cost Detail by Cost Type
- Job Cost Detail by Cost Code
- Budget by Cost Type
- Budget by Cost Code
- Estimate Summary
- Job Cost Summary

\$989.30 Actual Exp to Budget \$  
\$2,315.58 Invoiced to Actual Exp  
\$1,000.00  
\$1,315.58

%