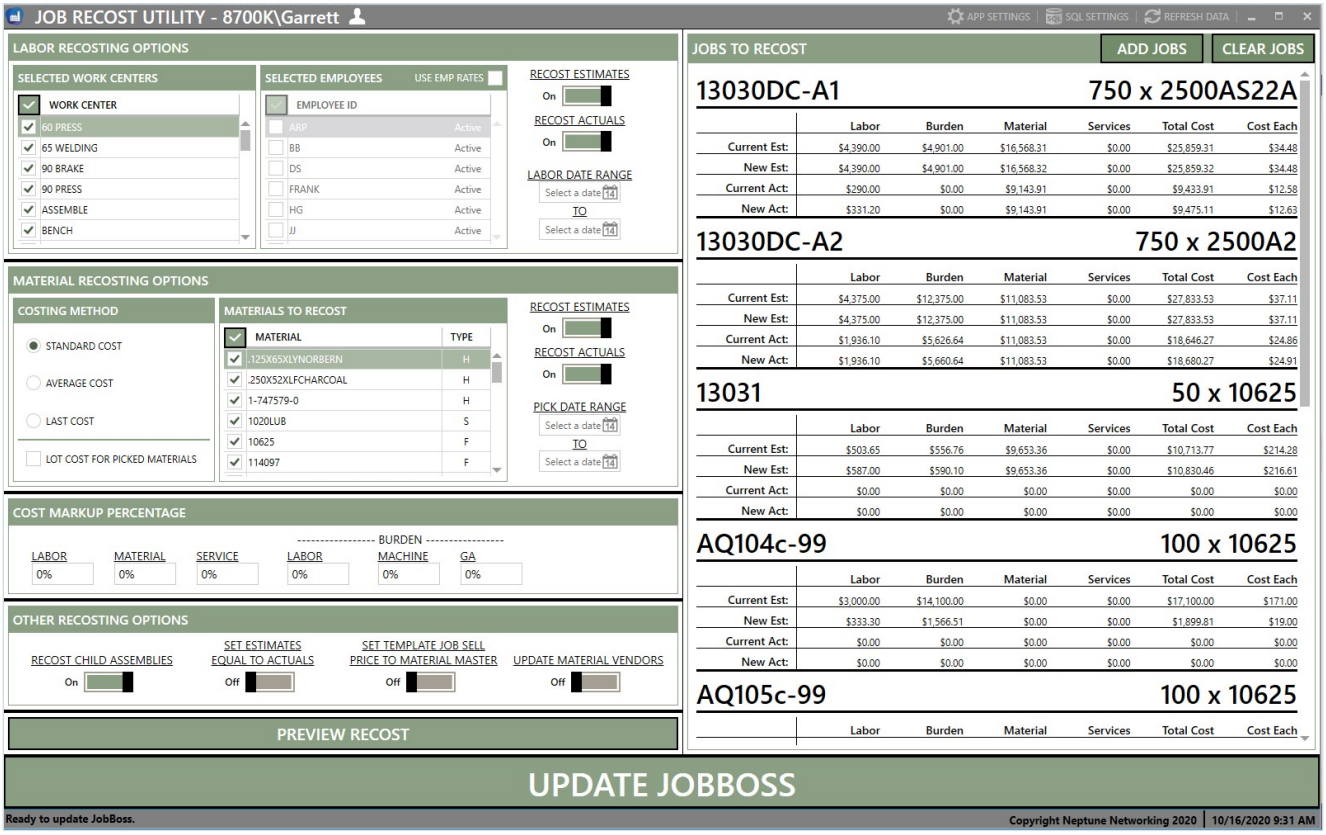
TRAINING GUIDE

Job Recost

Refresh existing job costs with a defined scope and a checked result.

Job Recost recalculates costs on existing JobBOSS jobs and templates using the selected labor and material basis. Four independent switches control labor estimates, labor actuals, material estimates and material actuals. Additional options can broaden the update.



Recognize the Version 2 workspace by its labor/material panels, Jobs to Recost comparisons, Preview Recost and Update JobBOSS controls. Appearance and additional detail views vary by installed version.

Start with one understood job, configure one scenario and review its comparison. If you change the assumptions after previewing, use **REFRESH DATA** or restart, then reload the jobs and selections before another preview.

Follow the first task on page 2. The scope of actual costs and historical transfers is explained on page 13.

QUICK START

Your first template cost refresh

Use one known template and only the cost categories you intend to change.

1. **Prepare the basis**
   Confirm the work-center rates and selected material cost field in JobBOSS. Use a representative training example or a small, understood live update.

2. **Start with current data**
   Open the configured Job Recost shortcut and confirm the database. If source values changed while it was open, use REFRESH DATA or restart before loading the job.

3. **Add the template**
   Choose ADD JOBS, explicitly select Template under Job Status, enter the exact Job or Part Number, and SEARCH. Check the intended result and ACCEPT.

4. **Select the intended scope**
   Enable the required estimate switches. Select the work centers and materials that should change, and choose the material cost basis. Leave actuals, lot costing, percentage factors and extra synchronization off for this first task.

5. **Preview and explain**
   Choose PREVIEW RECOST. Compare Current Est with New Est and explain each difference. If an assumption must change, refresh/restart and rebuild the scenario before previewing again.

6. **Update and verify**
   Choose UPDATE JOBBOSS for the reviewed result and wait for completion. Reopen the template in JobBOSS and check the cost summary plus a representative operation or material requirement.

Find the detailed procedure

Preparation: 3 · Job selection: 4 · Excel target list: 5
Labor: 6 · Materials: 7 · Dates and lots: 8
Preview and update: 9-10 · Optional functions: 11-12
History and detail: 13 · Troubleshooting: 14 · Practice: 15

BEFORE LOADING THE BATCH

Prepare the database and source values

Decide what should change before choosing the recost options.

Use the shortcut and connection supplied for the installation. Some versions use saved SQL Settings; newer installations may follow the active JobBOSS database. Confirm the intended company/database before adding jobs. Have the setup contact handle connection changes.

Prepare	Check before the run
Business objective	Template estimate maintenance, existing-job estimate refresh, or a specific actual-cost correction.
Source rates	Work-center setup/run and burden rates; employee rates when the actual-labor task uses them.
Material basis	The intended Standard, Average or Last cost contains the right value and uses the expected costing units.
Target and categories	A specific job list and explicit estimate/actual choices. Determine whether any child jobs or synchronization options belong in the run.
Baseline	Keep the relevant job totals and representative detail values so the result can be explained afterward.
Working period	Coordinate the batch so another user does not save stale open job data over the revised costs.

Reload after master data changes

REFRESH DATA clears the loaded jobs and reloads the working data. Add the jobs again and reselect the work centers, materials and employees needed for the new scenario. Close and reopen the utility if the displayed basis remains stale.

Settings can be remembered for the current Windows user. Review every switch and percentage when starting a new task. For a broad or unfamiliar historical update, work through a representative example in a suitable training copy before applying the full batch.

TARGET SELECTION

Find and accept the intended jobs

The checked result list defines the jobs added to the workspace.

1 **Open Job Search**
Choose ADD JOBS. Set Job Status explicitly instead of assuming the displayed default is the one you need.

Search item	How to use it
Job	Enter an exact existing job ID. A prefix followed by * searches jobs starting with that prefix.
Part Number	Use an exact part number or a prefix followed by *. Review all matching jobs before selecting them.
Job Status	Choose All, Active, Closed, Complete, Hold, Pending or Template to match the task. Closed jobs are not automatically protected from recosting.
Order Date Range	Limits the search by the job order date. This is separate from labor work dates and material lot lookup dates.
Result columns	Review JOB, ROOT JOB, CUSTOMER, ASSEMBLY LVL, PART NUMBER, ORDER QTY and ORDER DATE.

2 **Review and check results**
Choose SEARCH, inspect the rows and check only the jobs that belong in the batch. Review the actual IDs even when customer or component controls are filled in; those controls are not a reliable sole boundary across builds.

3 **Accept and confirm**
Choose ACCEPT. Confirm the Jobs to Recost list and add other intended jobs if needed. CANCEL leaves without accepting the new selection.

CLEAR resets the search. **CLEAR JOBS** removes the main job list. Use **REFRESH DATA** or restart when resetting a calculated scenario; clearing a list is not an undo or a fresh-data reset.

BATCH TARGET SELECTION

Load an Excel list of job IDs

The workbook identifies existing jobs; it does not supply new cost values.

Prepare a simple workbook with one worksheet and one column. Put **Job** in the first row and exact existing JobBOSS job IDs underneath. Use text cells to preserve leading zeros, punctuation and suffixes. A normal .xlsx file is the preferred working format.

Job	Meaning of this illustrative example
TEMPLATE-100	An existing template chosen for estimate maintenance.
TEMPLATE-101	Another existing template in the same planned batch.
TEMPLATE-102	A third existing job ID to find and review.

The real import sheet needs only the first column; the explanation column above is for this guide. Replace the sample IDs with real identifiers. Keep a header row and at least one data row, and remove trailing spaces or blank-only content.

1. **Open the import**
   Choose ADD JOBS, then IMPORT in Job Search. Select the prepared workbook.

2. **Review the returned matches**
   The importer reads the first returned worksheet and its first column, then looks up existing job IDs. Check the matched IDs and confirm their statuses in JobBOSS where needed. Reconcile missing IDs against the source list.

3. **Select and accept**
   Check the intended matching rows and choose ACCEPT. Confirm the resulting Jobs to Recost list before choosing recost settings.

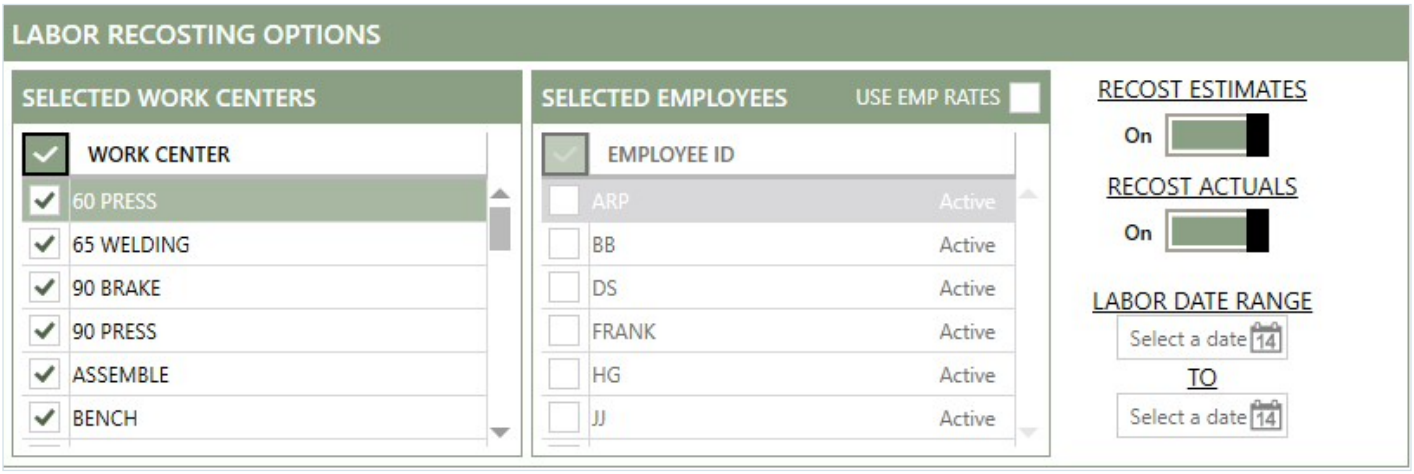
Imported matches are selected by ID rather than by the search filters. Review the status and scope of every imported job. This process does not create jobs, import rates, update master materials or process a general cost-change spreadsheet.

If Excel cannot be read, retain the exact error and ask the setup contact to check the installed spreadsheet provider. Keep the job list simple and use the documented file format rather than changing connection settings.

LABOR RECOSTING OPTIONS

Select labor estimates and actuals

Choose the cost category and the work centers that should participate.



Labor Recosting Options in the Version 2 screen. The work-center list, employee-rate option, independent switches and Labor Date Range are separate controls.

Control	Operating meaning
RECOST ESTIMATES	Recalculate eligible inside-operation estimates from work-center rates and existing estimated hours.
RECOST ACTUALS	Recalculate selected actual-labor costs from existing time records and the chosen rate basis.
SELECTED WORK CENTERS	Check the centers that belong in the run. Enabling a recost switch alone does not select them.
USE EMP RATES / employees	For an employee-rate actual-labor task, enable the option and select the intended employees. Estimate costing still uses work-center rates.

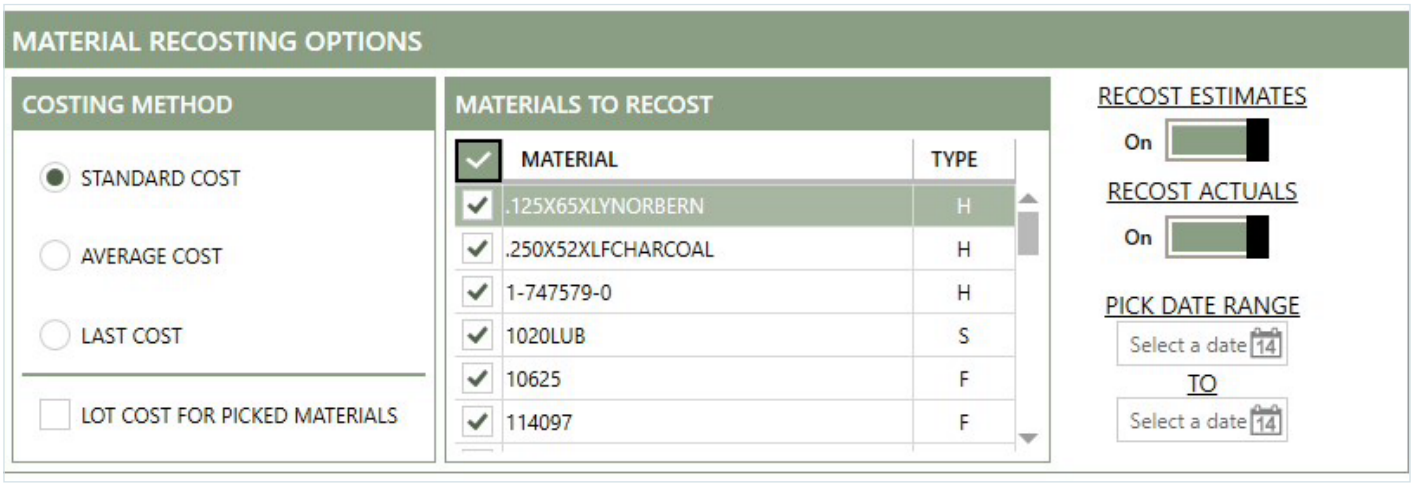
Set the Labor Date Range for the actual-labor task, then verify representative work dates and amounts. It is not an estimate-date filter. For template estimate maintenance, keep RECOST ACTUALS off unless there is a specific reason to change actual history.

Review labor and all burden components after calculation. Check both the job summary and representative operation/time detail; a date range or employee selection alone is not proof that the full resulting totals reconcile.

MATERIAL RECOSTING OPTIONS

Choose the material cost basis

Select both the intended materials and the intended estimate or actual scope.



Material Recosting Options provides Standard, Average and Last cost choices, a checked material list, independent estimate/actual switches and the advanced lot option.

Basis	What to establish
STANDARD COST	The standard master-cost basis is the one intended for this recost task.
AVERAGE COST	The current average basis is populated and appropriate, including any valid zero value.
LAST COST	The latest master-cost basis is suitable for the targeted existing jobs.

Check the intended rows under **MATERIALS TO RECOST** and turn on the required material estimate and/or actual switch. The selection list uses active master materials. If an expected material is absent, check its master status and installation data.

Confirm the cost basis and units before previewing. Existing manually entered job costs can differ from the chosen master value. A zero Average cost can therefore produce a zero recalculated result; resolve whether that basis is correct before updating.

Verify both the material requirement’s unit cost and extended total in JobBOSS. Raw-stock stocking and costing units may differ, and the installed conversion and unit-cost behavior must be checked together.

SCOPE OF THE CALCULATION

Use date ranges and lot costing correctly

Different date controls serve different purposes.

Control	What it governs
Order Date Range in Job Search	Which jobs the search returns, based on their order dates. It does not choose individual cost transactions.
LABOR DATE RANGE	The work-date selection used in actual-labor recalculation. Estimates are not limited to dated labor transactions.
PICK DATE RANGE	In the reviewed Version 2 lot workflow, which issue/lot records are considered for finding a lot cost basis. It is not a general limit on all material actual-cost changes.

Treat lot costing as an additional costing choice

LOT COST FOR PICKED MATERIALS uses qualifying issue and lot information where available. The reviewed implementation uses current matching lot-location costs; it does not reconstruct a quantity-weighted historical pick price.

The material requirement’s actual total can still be recalculated from its full actual quantity. A limited pick date range does not mean only that period’s quantity is being repriced. When both material estimates and actuals are enabled, the lot-derived basis can also affect estimates in this implementation.

Check the boundaries with a known example

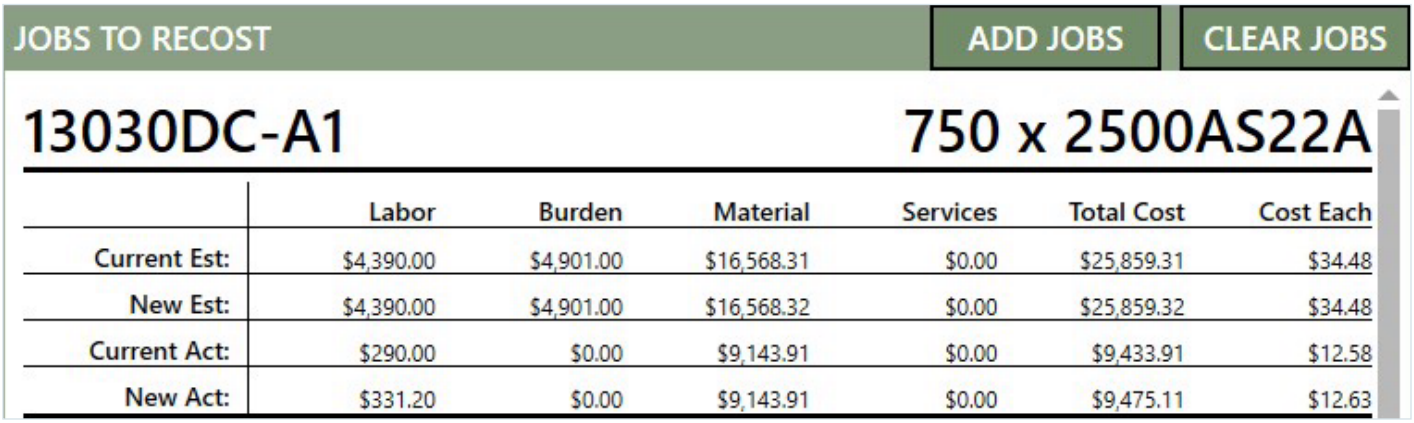
Before using lot costing or a limited historical period, compare the intended issue dates, lot records, units and full requirement quantity with the resulting values. Check records at date boundaries in the installed version.

For ordinary template estimate maintenance, use the selected Standard, Average or Last basis with lot costing off. The guide’s practice exercise follows that simpler path.

PREVIEW RECOST

Review one current and new comparison

Explain the change before completing the update workflow.



	Labor	Burden	Material	Services	Total Cost	Cost Each
Current Est:	$4,390.00	$4,901.00	$16,568.31	$0.00	$25,859.31	$34.48
New Est:	$4,390.00	$4,901.00	$16,568.32	$0.00	$25,859.32	$34.48
Current Act:	$290.00	$0.00	$9,143.91	$0.00	$9,433.91	$12.58
New Act:	$331.20	$0.00	$9,143.91	$0.00	$9,475.11	$12.63

The job comparison presents estimated and actual values separately. Cost Each is the displayed total divided by the job order quantity.

1. **Calculate the selected scenario**
   Check the targets, categories, lists and optional settings, then choose PREVIEW RECOST. Wait for calculation to finish and the status to indicate readiness.

2. **Read the result by category**
   Compare Current Est with New Est and Current Act with New Act. Review labor, burden, material, services and total together. New rows shown before a calculation are not evidence of a completed update.

3. **Explain exceptions**
   A matching result can be correct if the stored costs already match the chosen basis. Investigate unexplained zeros, missing categories or implausible changes before using UPDATE JOBBOSS.

Refresh before trying changed assumptions

In the supplied Version 2 implementation, preview can retain calculated operation changes, and a subsequent preview can save those earlier changes. **Use REFRESH DATA or restart before revising the scenario.** Re-add the jobs and reselect the work centers/materials/employees. Explicitly choose STANDARD COST, AVERAGE COST or LAST COST again, even if its radio button still appears selected, before calculating.

CLEAR JOBS only removes the list. It does not reverse stored changes or provide the same reset. If you have already repeated previews in an older installation, check the affected JobBOSS operation costs before continuing.

APPLY THE REVIEWED BATCH

Update JobBOSS and verify the stored result

Completion includes checking the job and its relevant detail.

1. **Confirm the reviewed configuration**
   Use the same targets and options that produced the comparison you accepted. Coordinate the update with users who may have the same jobs open.

2. **Run UPDATE JOBBOSS**
   Select UPDATE JOBBOSS to process the complete Jobs to Recost list, plus child jobs when that option is enabled. Highlighting one job card does not narrow the update. Let processing complete; the reviewed layout does not add a second approval dialog.

3. **Reopen and compare**
   Reopen or refresh the affected job in JobBOSS. Compare the summary and representative detail with the intended scenario and retained baseline.

Verify	Look for
Job cost summary	The intended labor, material, service and burden totals, with estimate/actual treatment understood.
Operations and time detail	The selected work centers, labor values, burden components and applicable rate/date treatment.
Material requirements	Both unit and extended cost, interpreted using compatible costing and stocking units.
Optional updates	Child jobs, estimate replacement, vendor, drawing/revision or selling price only where those actions were intended.

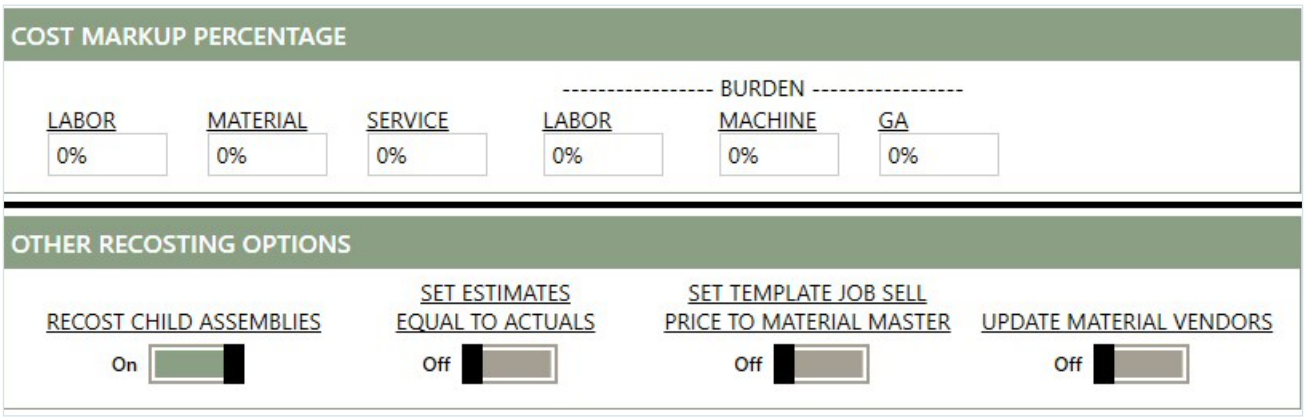
The batch saves work as it progresses. An error can occur after earlier jobs have changed; do not assume that a failed run rolled everything back. Record the message and check the actual state of the affected jobs before repeating the run.

A success message is the cue to verify the stored result. Keep the job list, selected basis and relevant before/after evidence with the costing task.

ADDITIONAL COST OPTIONS

Apply percentage factors and estimate replacement

Enable only the extra actions that belong in the planned run.



The Version 2 screen groups percentage factors and other recost options below the material controls. Master-data synchronization and assemblies are covered on the next page.

COST MARKUP PERCENTAGE

The separate Labor, Material, Service and burden percentage fields adjust the applicable job summary categories. They are additional cost factors; they do not replace the selected master rates or mean the same thing as a selling-price margin.

Leave these values at zero for a basic master-rate refresh. If a percentage is required, review the resulting job total and underlying detail separately: the summary-level factor is not necessarily written as the same multiplier on every detail line.

SET ESTIMATES EQUAL TO ACTUALS

This option replaces estimated cost fields with the corresponding actual-cost basis during the update. It is useful only when that replacement is the intended objective, such as revising the cost basis used for future copied work.

The substitution occurs during the update; **New Est is not a separate preview of the final estimate-to-actual replacement.** Review the actual values that will supply it. This option does not copy actual hours or quantities into all planned fields. Verify the saved estimates and leave it off for an ordinary recalculation.

Check these controls at the start of every run. A remembered extra option can change the meaning of an otherwise familiar recost workflow.

ADDITIONAL UPDATE SCOPE

Control assemblies and master-data synchronization

These options can affect more than the visible cost comparison.

Option	Scope to review
SET TEMPLATE JOB SELL PRICE TO MATERIAL MASTER	Copies the matching material selling price to the job unit price and calculates job total price. Despite the label, the reviewed update is not restricted to Template status; limit the target list deliberately.
UPDATE MATERIAL VENDORS	Copies a nonempty primary vendor from the material master to job material requirements when material recosting is enabled. Review all requirements on the targeted jobs, not only the checked material subset.
Drawing and revision update	Where this control is present, copies drawing/revision from the material matching the job part number. It is an additional job-field update.

RECOST CHILD ASSEMBLIES

When enabled, the update can traverse child jobs and apply the same recost settings. The main preview does not automatically list every descendant comparison. Identify and review the affected child jobs explicitly when their costs need approval or explanation.

Choose a deliberate parent/child strategy. Avoid unintentionally including the same child both as an explicit target and through a parent’s recursive update. Check the changed jobs afterward rather than treating a parent summary as proof that every child was reviewed.

Run a selling-price-only task

The selling-price option can make UPDATE JOBBOSS available without a normal recost preview. For a price-only task, start with REFRESH DATA or restart, add the intended jobs, and leave all four recost switches and unrelated extra options off. Confirm the target statuses, part-to-material matches and source selling prices before running UPDATE JOBBOSS.

VERIFICATION SCOPE

Understand historical costs and detailed review

Keep the job-cost change distinct from other accounting and inventory records.

The utility can target closed as well as active jobs. Changing actual costs revises the stored job-cost basis; it does not create a separate current-date adjusting entry. Decide which historical jobs and periods belong in the task before running it.

Area	What the workflow covers
Job and job detail	Selected job cost summaries, material requirements, operations and applicable labor time-rate fields.
Material issues and lots	Issue/lot information can be read for a costing basis. The reviewed implementation does not rewrite historical material-transaction rows.
WIP-to-inventory transfers	Already-recorded transfer costs are outside this update. Recost before a planned transfer when practical; review prior transfers through the site’s established costing process.
Financial and master records	Do not expect automatic GL adjustments, finished-good master cost rolls or a complete inventory revaluation from this job update.

Detailed comparison and Excel export when available

Newer demonstrated installations include a per-job detail window with old/new material, operation and employee-labor values and an Excel export. If those controls are present, use them to inspect and retain the comparison. The illustrated repository layout provides summary cards; use JobBOSS detail and reports where the newer controls are absent.

A detail view that displays transfer information does not establish that transfers are recosted. Verify the specific records that the chosen update is intended to change.

For raw stock, compare compatible stocking and costing units. A displayed quantity multiplied directly by a cost in another unit can produce misleading arithmetic.

PRACTICAL TROUBLESHOOTING

Resolve an unexpected result

Use the target list, chosen basis and actual stored values to isolate the issue.

Question or symptom	Useful next step
No cost change after preview	Check the category switches and checked work-center/material lists. Confirm current master data; the existing job may already match that basis.
Material cost becomes zero	Inspect the specific Standard, Average or Last value selected. A valid zero master value can replace a previously entered job cost.
Jobs disappeared after refresh	REFRESH DATA clears targets. Re-add the jobs and reselect the lists and material cost basis before the next calculation.
Expected jobs are missing	Set Job Status explicitly and review Job/Part spelling and order dates. For import, reconcile exact first-column IDs against the returned matches.
Totals or burden look wrong	Stop before the update. Compare the selected rates, burden basis, units and job detail. Refresh/restart before a revised scenario; retain examples for the setup contact.
Unit and extended cost differ unexpectedly	Check costing/stocking unit conversion and both fields in JobBOSS. Retain a representative material and installed version when requesting review.
Update fails or is interrupted	Record the error and inspect which jobs changed. Resolve the cause and actual saved state before repeating; a batch is not a guaranteed all-or-nothing update.
Detail or Export is missing	Those controls belong to newer installed layouts. Use the summary comparison and JobBOSS detail available in the current installation.

For follow-up, include the installed version, database context, exact job IDs, selected options and basis, dates, a representative material/work center, expected result and actual result. Share the error text or a suitable screenshot without credentials.

TRAINING EXERCISE

Practice one material estimate refresh

Use a known template with one simple material requirement.

Choose a representative template and material for which the intended source basis is known. The example below uses matching costing and quantity units, no additional charges, no lot option and zero percentage factors. The numbers are illustrative.

Measure	Before	Intended result
Estimated material quantity	10 units	10 units
Selected master unit-cost basis	Previously 5.00	Now 6.00
Simple estimated material extension	50.00	60.00
Actual-cost scope	Not selected	Outside this exercise

1. **Prepare and select**
   Confirm the 6.00 source basis in the intended database. Start with fresh data, add only the example template, enable material estimates and select the example material.

2. **Keep the scope simple**
   Select the matching cost method. Keep labor/actual switches, lot costing, assemblies, synchronization and estimate replacement off. Keep all percentage factors at zero.

3. **Preview once and explain**
   Review the expected material estimate change and unchanged scope. If the unit or extension does not reconcile, investigate before updating. Refresh/rebuild before changing any assumption.

4. **Apply and check**
   Run UPDATE JOBBOSS and reopen the template. Confirm both unit and extended material cost in compatible units, the job summary and the intended scope.

The exercise is complete when you can explain

- Which jobs and materials were selected, which source cost was used and why actuals were left out.
- How to reset for another scenario and where the saved result was checked in JobBOSS.

RESOURCES AND OPERATING CHECKLIST

Keep the guide with the recorded resources

Make the next cost-maintenance task repeatable.

Before and after the run

- **Before:** correct database; intended master basis; explicit job list; checked work centers/materials; deliberate estimate/actual switches; unnecessary extra options off.
- **Review:** one scenario; explain current/new differences; refresh or restart before changed assumptions; inspect child jobs where relevant.
- **After:** reopen the job, verify summary and detail, reconcile any partial result, and retain the target list and relevant comparison.

Open the recorded webinar registration

The repository lists this shared GoToWebinar recording. Complete the registration step to access it and use the illustrated guide for the installed workflow and version differences.

Earlier demonstration: Easily Recost Your Job Templates

This official ECI recording runs approximately 52 minutes and shows an earlier template-cost workflow. It is a supplemental historical resource; the Version 2 controls and current task sequence are explained in this guide.

Product overview: Neptune-Job-Recost-Marketing.pdf explains the business use, selected cost categories, batch workflow and training resources.

Contact Neptune for setup or training assistance

Have the installed version, database context, job IDs, selected options and the question or exact result ready.

Prepared from the exact utility source, repository application imagery and six historical Fireflies training/support sessions. Revision 2026-11-04. Private session details are excluded from this customer guide.