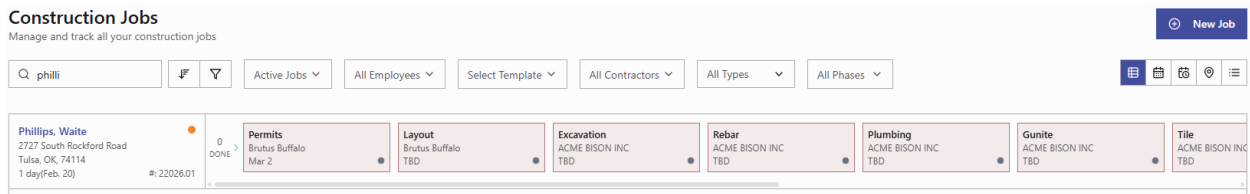
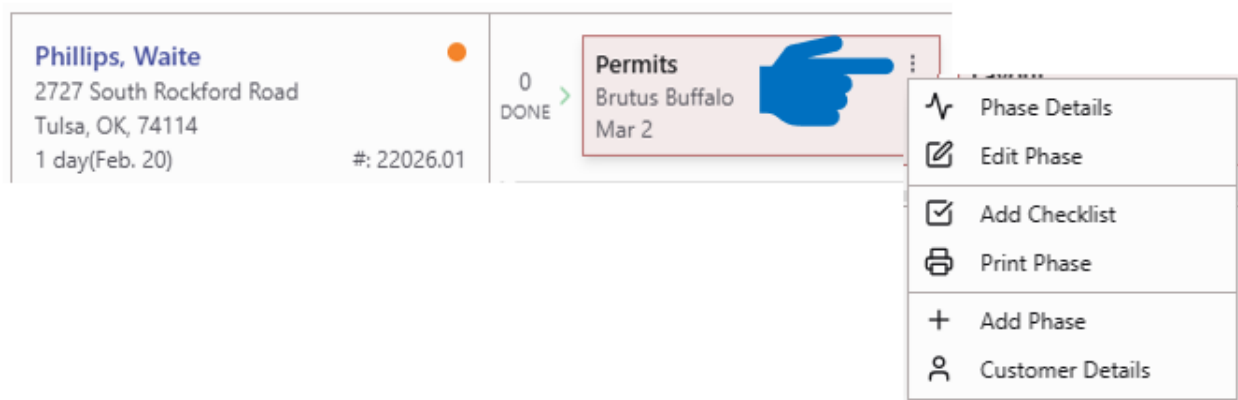


Managing Construction Phases-Whiteboard

Once a job is created, each phase (Permits, Layout, Excavation, etc.) is represented by a block on the **Construction Jobs-Whiteboard** dashboard.



The **Phase Quick Action Menu** is accessed by clicking the three dots (vertical ellipsis) on any specific phase block within a Job or Lead card.



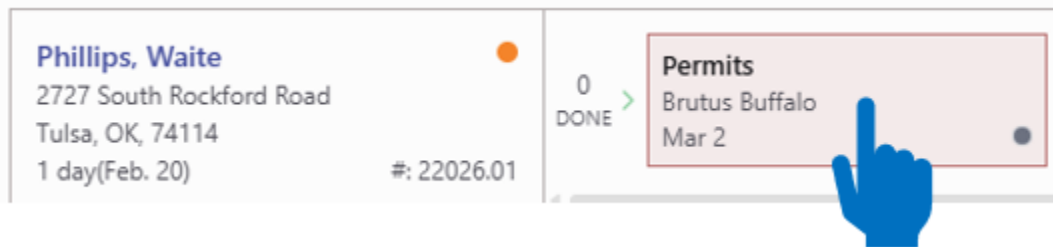
Quick Action Options

- View Phase Details
- Edit Phase
- Add Checklist
- Print Phase Report
- Add Phase to Job
- View Customer Details

Editing a Construction Phase & Updating Status

To modify a phase:

- Locate the specific phase block (e.g., "Excavation") on the job card.
- Click the **Phase Name** to open the editing window.



Edit Phase Screen: Activity Feed Tab

Edit Phase: Permits - Phillips, Waite

Phase Name

Permits

+

Status *

Not Started

Assigned To

Q Buffalo, Brutus

Phase Schedule

All day

Scheduled Date

03/02/2026

Duration (Days)

1

Start Date

mm/dd/yyyy

Completed Date

mm/dd/yyyy

Target Date

mm/dd/yyyy

Parent

No parent

Activity Feed

Brutus Buffalo

3 days (Feb. 20)

...

Phillips, Waite | Permits

Permits applied for with city of Tulsa



0

0

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Real-time activity tracking with team notifications and customer updates

Cancel

Update Phase

Edit Phase Screen: Activity Feed Tab (Continued)

- **Phase Name:** A dropdown menu (currently set to "Permits") used to categorize the specific stage of the project.
- **Colorize Phase:** Click the plus button to select a color for the phase, if a color is already selected, a color box will show in place of the plus button.
- **Phase Status:** Indicates the current progress of the phase (e.g., "Not Started," "In Progress," or "Complete").
- **Phase Assignment:** The "Assigned To" field designates the specific team member or sub-contractor responsible for overseeing this phase.

Phase Schedule

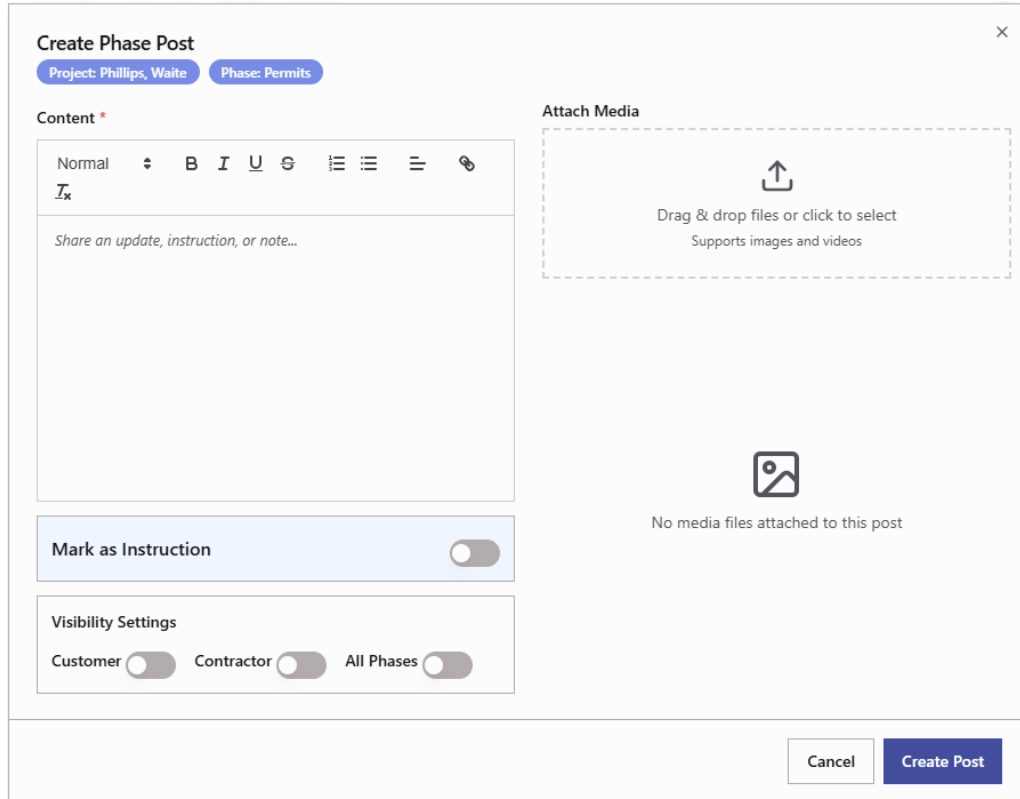
- **All Day/Time Toggle:** A switch that determines if the phase occupies a full workday or if specific start/end times need to be entered.
- **Schedule Date:** The primary date the phase is intended to begin.
- **Phase Duration (Days/Time):** Days/Hours phase will last.
- **Start Date:** The actual date the work on the phase began.
- **Completed Date:** The date the phase was officially finished.
- **Target Date:** The deadline or goal date by which the phase must be finished.
- **Parent Phase:** If selected shows phase this phase is dependent on.

Activity Feed: The right-hand pane that displays a chronological log of updates, comments, and photos related specifically to this phase.

- **Add Phase Post:** The "+ Add" button within the Activity Feed used to share manual updates, upload images, or tag team members.

Edit Phase Screen: Activity Feed Tab (Continued)

Creating a Phase Post:

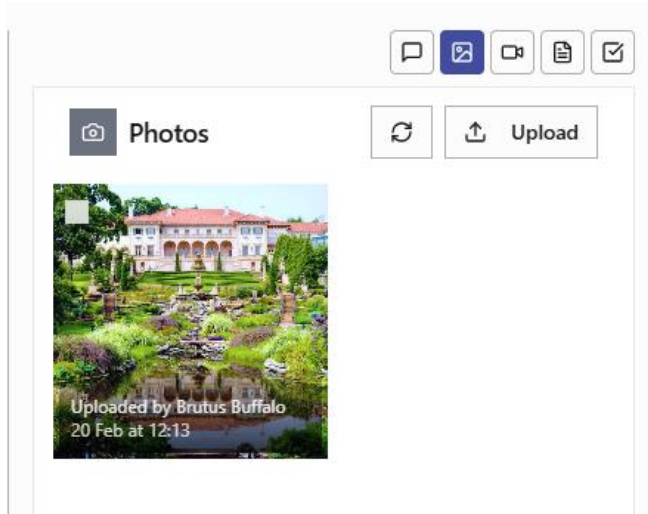


- **Content Editor:** A rich text editor used to "Share an update, instruction, or note."
- **Mark as Instruction:** A toggle switch that allows the user to designate the post specifically as a set of instructions.
- **Visibility Settings:** Control who can see the post.
- **Attach Media:** A drag-and-drop or click-to-select area for uploading supporting files, such as images and videos.

Create Post: Submits the information and media to the project's activity feed

Edit Phase Screen: Photos Tab

The **Photos tab** is a dedicated section within a project phase for managing visual documentation.

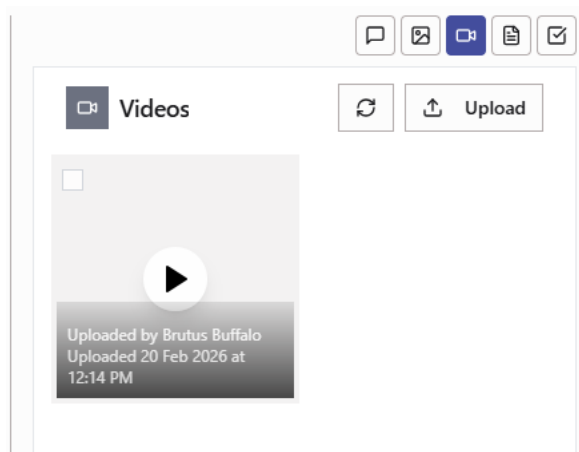


Gallery View: Uploaded images are displayed in a grid format.

Upload Tool: Users can add new images by clicking the **Upload** button.

Refresh: A **sync/refresh icon** is available to update the gallery and see the most recent uploads from other team members.

Edit Phase Screen: Videos Tab

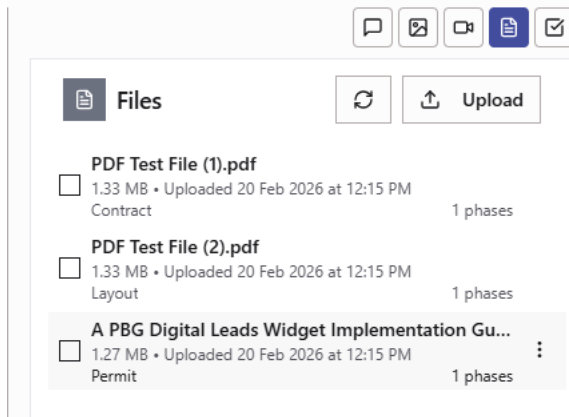


Gallery View: Uploaded videos are displayed in a grid format.

Upload Tool: Users can add new videos by clicking the **Upload** button.

Refresh: A **sync/refresh icon** is available to update the gallery and see the most recent uploads from other team members.

Edit Phase Screen: Files Tab



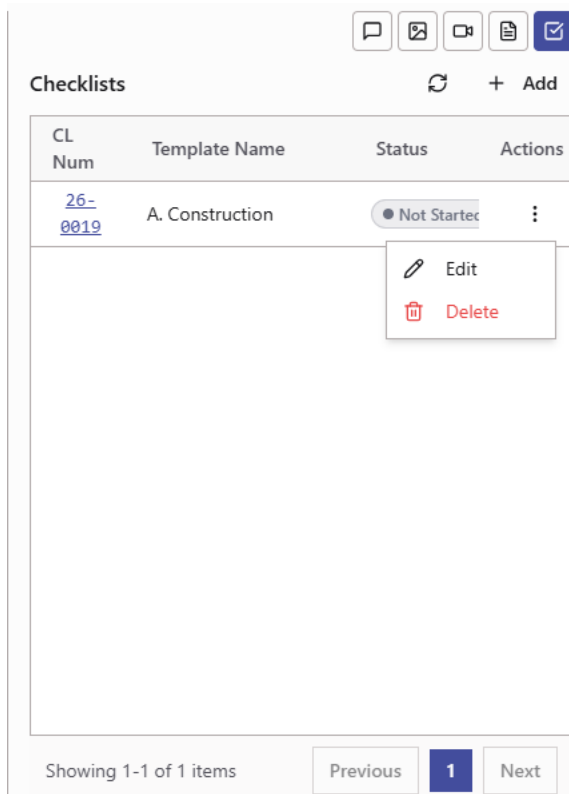
List View: Uploaded phase files are listed.

Upload Tool: Users can add new files by clicking the **Upload** button.

Refresh: A **sync/refresh icon** is available to update the gallery and see the most recent uploads from other team members.

Edit Phase Screen: Checklists Tab

The Checklists tab displays all checklists associated with the current phase. It allows users to create, view, update, and remove checklists on the phase.



Toolbar Options

- **Refresh (U)** – Reloads the checklist list to display the latest information.
- **Add (+ Add)** – Creates a new checklist using an available template.

Actions Menu

Click the **three-dot (:)** menu in the **Actions** column to access additional options:

- **Edit** – Modify the selected checklist or update its details.
- **Delete** – Permanently remove the checklist from the project. This action cannot be undone.

Tip: Click the **CL Num** link to quickly open a checklist for viewing or editing, rather than

using the action menu.