

Work Breakdown Structure (WBS) View:

- We only show 1 service at a time in a WBS view.
- Non-labor Items are not included in WBS view.
- Tasks can only be added in a phase.

Dates:

- Phase start date can be different from the service start date from creation.
- If a quote start date is changed, the service/phase should be shifted accordingly
- If a service start date is changed, the phase should be shifted accordingly.
 - The phase start date is shifted based on the calendar day, but the number of working days in a phase stays the same.
- You can't change dates for Phases when the service has an Effort Estimation of With Phases and Tasks.
- When the service has an Effort Estimation of With Phases, you can update these End Dates for Phases by:
 - Changing start dates on a quote and service.
 - Deleting a phase or service.
 - Changing the End Date.
- Editing phase date or deleting phase won't shift the other phases.
- Changing Phase Start Date will not change the date for non-labor items except when the date change impacts the Service Start Date.
- Date on non-labor items can be outside of phases/tasks date ranges but it has to be inside of service date range.

Allocations:

- When you have services with Effort Estimation of With Phases or With Phases and Tasks, you must add the role allocation in the WBS view first, then edit in the Timeline view.
- In the Timeline view, when there are multiple phases or tasks, the allocations are split evenly across the phases or tasks in the specified date range. For services with only 1 phase or task, the allocation is split evenly across the number of working days.

Delete:

- Deleting a phase doesn't shift the other phases/tasks.