 **Viewpoint**
Jobpac Connect[™]

Service Order Management
Module Guide
Version: 1.0

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Change History

Version	Date	Author	Description of Changes
1.0	30/06/2022	DMB	Initial Release

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Introduction

The Service Orders (Service) Module is designed to be used in conjunction with the Project Costing Module within the system. The Project Costing Module is the means to track costs and transactions that are recorded against Service Work Orders in preparation for billing revenue.

Service Orders can be used to capture Cost and Revenue for small parcels of work. They could be used in a manufacturing environment, for example where box sections are being manufactured in a workshop to be sold to clients, or just for numerous small jobs being done for a specific client.

All Work Orders require a Job to be linked to them which is usually a summary Job for a single Business Unit, or could be for a selected major contract for a client. All Jobs must be marked as a Small Orders Job, and nominate General ledger accounts using Service Orders to function in this module.

In the Service Module not only Work Orders can be created, processed and billed but Service Contracts with Scheduled Maintenance routines can be established. These are used to cater for work required to be performed to complete the contractual requirements for your Customers.

Objectives of this Reference Guide

To provide user information on the module functionality, including:

- The set-up procedures to follow for the module configuration
- The creation of Work Orders
- The definition of activities/ tasks to be performed within a work order
- The allocation of resources associated with work orders
- The ability to price a work order and create budgets against a Job
- The ability to manage quotes for approval as work orders
- Review capability to enable detailed searches to be performed
- The creation of printed work orders and other documents
- The creation of Service Contracts
- The set-up of scheduled maintenance in relation to Service Contracts
- The generation of Run Sheets for scheduled maintenance

Enter Module Name Here

System Parameters and Key Code Tables

The following set-up tables and settings need to be defined as part of the design and planning process.

System Parameters

Note: The following System Parameters should be set-up in consultation with your Jobpac Consultant, and care should be taken at all times when making changes to these set-ups. System Parameters control the configuration of each module, and the way many programs function within Jobpac.

To set up or amend the system parameters select

>System Administration >Define Companies >Maintain Parameters.

SSWOMF - Work Order mandatory fields

These are codes that can be setup to use the Service Order Module. This parameter determines if they are mandatory when used with a Service Order

Position	Details
1	Region mandatory (Y/N)
2	Business unit mandatory (Y/N)
3	Industry mandatory (Y/N)
4	Initiated by mandatory (Y/N)
5	Allocated to mandatory (Y/N)
6	Delivery method mandatory (Y/N)
7	Warranty method mandatory (Y/N)
8	Closure method mandatory (Y/N)
9	Lost reason mandatory (Y/N)
10	Fault type (Y/N)

WONUMB - Work Order number

Position	Details
1	Generate Work Order numbers automatically (Y/N)
2-3	Two character prefix for Work Order numbers

SSCOMF - Service Contract mandatory fields

Position	Details
1	Region mandatory (Y/N)
2	Business unit mandatory (Y/N)
3	Industry mandatory (Y/N)
4	Warranty method mandatory (Y/N)

Enter Module Name Here

SSPARM – Service Order parameters

Position	Details
1	Is Job Security used (Y/space)
2	Is fixed price for Work Order to be entered (Y/space)
3-12	If fixed price & price is entered, default Resource code
13-14	If fixed price & price is entered, default Cost Type
15	If fixed price and value is 'A', then it will print the Activity details, otherwise it will print 1 line of description on the Work Order Invoice print.
16	If Cost Plus and value is 'T', then it will print the transaction details, otherwise it will print the Activity details on the Work Order Invoice print.
17	If Schedule of Rates and the value is 'R', then it will print the Resource details, otherwise it will print the Activity details on the Work Order Invoice print.
18-19	Spare fields
20	If 'Y', it will print the Labour hours on the Work Order to be done hours report.
21-22	Work Order print format
23-24	Spare fields
25-28	Default screen format on the Maintenance first screen
29	Spare field
30	If not equal to 'N', will add '0000' to Invoice when alpha field on the 'ARINV' Parameter is blanks
31	Use site name as Invoice header description (Y/N)
32-35	Spare fields
36	'D' = print Start and Completion dates on the W/Order Financial Status report

WORESP Work Order Resource code Settings

Position	Details
1	If this position is set to 'Y' then the option to prompt for Product also is added along with option for prompting for resource rate,
2	Resource Type default if position 1 is turned on.
3-4	Cost Type default if position 1 is turned on
5	Subcontract default if position 1 is turned on.

Other Parameters are

SOBILL
 SSPAR1
 SSPRIO
 SSWOCO
 SSWOPR
 SSWPRT
 SSUD01
 WOADFT
 WOARCH
 WOASCT
 WOCDAT
 WOSCST

Enter Module Name Here

Mandatory Codes

Departments

Departments are mandatory to be created and used to represent the different Service Business Units in the organisation. Department settings control the postings for costs and revenue to the General Ledger. These are used in a similar way to Job Group codes, and each Department can have a set of Cost GL accounts and Revenue accounts. They are usually aligned with Profit Centres

Note: The initial set-up of the job costing environment by way of creating valid Cost Types must be completed before you will be able to create Departments.

From the Jobpac main menu select

>System Administration >Configure Modules >Job Costing>Maintain Departments

Service System - Department Listing			
Department	Description	Manager	
SUPPLY	Supply of Goods	Damien Bourke	

Service System – Department Listing

Select Add New Department from the Actions menu or select an existing department.

Service System - Department Maintenance			
CT	Description	Account	Description
PR	PAYROLL	10008000	Cost of Sales - Payroll
LB	LABOUR	10008001	Cost of Sales - Labour
MT	MATERIAL	10008002	Cost of Sales - Materials
SC	SUBCONTRAC	10008004	Cost of Sales - Subcontract
PL	PLANT	10008003	Cost of Sales - Plant
OT	OTHER	10008005	Cost of Sales - Other

Service System – Department Maintenance

Enter Module Name Here

Field Name	Description
Department	Code to define the Department (can be up to 10 characters long).
Description	Name of the Department
Manager	The name of the manager of the Department.
Revenue GL Control Account	General Ledger code where invoicing amounts will be posted for this Service Business unit.
Job Group Code	A Job Group code can be entered (not sure of its use)
Cost GL Control Accounts for Cost Types	General Ledger codes for each valid Cost Type where costs will be posted for this Service Business Unit.

Activity (Resource) Codes

Activities are mandatory to be created for use on Work Orders. These are a full list of all activities required to undertake a Work Order. A subset of these is linked to each Work Order

From the Jobpac Main Menu select >Service Orders >Maintain Codes More >Maintain Activities

Code	Description	Status	Type	CT01	CT02	CT03	CT04	CT05	CT06	CT07	CT08	CT09	CT10	
HIR	Hire Equipment	A												
LOD	Load Out	A												
MAC	Machining	A												
MAR	Marine	A												
MAT	Materials and Plant	A												
MELD	Mechanical Design Drafting	A												
MELE	Mechanical Design Engineering	A												
MP	Manuf Products Stores Setup	A												

The system will allow you to limit the Cost Types that can be used for the activity. Selecting none will allow all Cost types to be used. Select Constraints from the drop down list

Code	Description	Status	Type	CT01	CT02	CT03	CT04	CT05	CT06	CT07	CT08	CT09	CT10	
HIR	Hire Equipment	A	Define Constraints											
LOD	Load Out	A												
MAC	Machining	A												
MAR	Marine	A												
MAT	Materials and Plant	A												
MELD	Mechanical Design Drafting	A												
MELE	Mechanical Design Engineering	A												
MP	Manuf Products Stores Setup	A												

Select the Cost Types to be used and choose OK. Select Cancel to exit the screen.

Code	Description	Status	Type	CT01	CT02	CT03	CT04	CT05	CT06	CT07	CT08	CT09	CT10	
HIR	Hire Equipment	A												
LOD	Load Out	A												
MAC	Machining	A												
MAR	Marine	A												
MAT	Materials and Plant													
MELD	Mechanical Design Drafting													
MELE	Mechanical Design Engineering													
MP	Manuf Products Stores Setup													
NON	Non Chargeable													
OTH	Travel & Other Costs													
PAI	Painting													
PE	Principal Engineer													
PH	Public Holiday Rates Apply													
PICK	Pickups & Deliveries													
PIPD	Piping Design													
PLA	Internal Plant													
PLAN	Planning													

Constraints

Activity HIR Hire Equipment

LB (Labour)

PL (Plant)

MT (Materials)

SC (Subcontract)

OT (Other)

HR (Hires)

CS (Consumable)

EX (ExternalPM)

AU (BES Costs)

RESCCONST01

Resource Rates

Resource Rates can be setup in advance and then be selected when Resources are being defined. They are not Mandatory.

From the Jobpac Main Menu select > *Service Orders* > *Maintain Codes More* > *Maintain Resource Rates*

- Select a Job to add applicable rates.

Note: Only Jobs that have been defined as being Small order Projects and a Service Order link to the GL, can be selected here.

Service System - Maintain Resource Rate					ACTIONS	OK	BACK
Job	WOJOB	Workorder Job			< > ...		
Resource	Type (L/M/P)	Cost Type	Subby	Rate			
Inspection	L	MT	N	150.0000			
Labour	L	LB	N	120.0000			

Field Name	Description
Resource	Description of the chargeable item for the selected Job.
Type	Select (L)abour, (M)aterials or (P)lant
Cost Type	Enter the relevant Cost Type for this chargeable item, e.g. LB = Labour Internal
Subby	Indicate if this item is to be subcontracted (Y/N)
Rate	Enter the Unit rate to be used

Enter Module Name Here

Allocated To

These are mandatory and represent a person or a group who has been allocated responsibility for the each Work Orders. This field can be used for reporting purposes as well.

From the Jobpac Main Menu select > *Service Orders >Maintain Codes More >Maintain Allocated To*

Service System - Allocated To Maintenance		ACTIONS	OK	BACK
Hide Apply		<	>	...
From	Contains			
To				
Allocated To	Description			
JIM	Jim Blake			
BOB	Robert James			

Work Order Approval Levels

Work Orders entered as a status of Quotation can only be approved by Users with the appropriate authority level. This authority needs to be set-up.

From the Jobpac Main Menu select >*System Administration >Configure Modules >Job Costing >Assign W/Ord Approval Lvl*s

Service System - Maintain User Maximum Authorisation Values				ACTIONS	OK	BACK
Hide Apply				XLS	+	< > ...
From	Contains	From				
To		To				
User	Name	Maximum Authorisation Value				
BOUDAMO	Damien Bourke - Jobpac	1,000,000.00				
DAVGRA0	Grant Davis - Jobpac	300,000.00				

Other Codes

A number of other codes are available that can be assigned to Work orders and used in filtering and reporting work orders

Maintain Sites

Site details can be recorded for locations that are re-visited on a regular basis, and used on a Work Order or linked to a Service Contract.

From the Jobpac Main Menu select > *Service Orders >Maintain Codes More >Maintain Sites*

To add a new Site Code select **Add New Site Code** from the Actions menu.

Enter Module Name Here

Service System - Site Maintenance : Listing

ACTIONS OK BACK

Hide Apply

Contains Contains

Site Code	Description
SITEA	Main Site for Brisbane Council

After adding the code, right click and select Details.

Service System - Site Maintenance : Details

ACTIONS OK BACK

Site SITEA Main Site for Brisbane Council

Contact Robert McMann

Address 193 Toorak Rd

Suburb North Adelaide PC 5044

Phone 0418844431 Fax

Email damien.bourke@viewpoint.com

Order Types

Contract Types

Contract Types are mandatory if you will be creating Service Contracts in the system.

Business Units

Industries

Regions

Warranty Methods

Delivery Methods

Closure Methods

Fault Types

Lost Reasons

Resource Rates

Initiated By

Maintain Sites

Enter Module Name Here

Equipment Codes

Equipment items that are serviced or maintained on Customer sites, including the scheduled maintenance routines required to be completed as the default settings.

Create/Maintain Equipment Codes

From the Jobpac Main Menu select >Service Orders >Maintain Equipment

Select **Add New Equipment** from Actions menu

Select the service checks/test interval

Service System – Equipment Maintenance

Field Name	Description
Equipment Code	Enter the required code (max 10 characters)
Description	Enter the description of the equipment item
1D	Daily check/test
2W	Twice weekly check/test
1W	Weekly check/test
1M	Monthly check/test
3M	Quarterly check/test
6M	Six Monthly check/test
1Y	Annual check/test

NB. These options need to be setup manually in the file SSSCHDINT. There can be up to 20 of them. There is no maintenance program.

Enter Module Name Here

Create/Maintain Work Orders

Work Orders are used to process all Service work, being reactive maintenance, quoted works or scheduled maintenance.

Summary of Process for Work Orders

1. Work Order header is set up and linked to a Work Order Job
2. It is automatically assigned a status of Quote
3. Activities are assigned to each work order
4. Resources are assigned to each activity. This is where prices are added.
5. It is approved by an authorised approver. This causes cost centres to be created on the Work order Job, with the single cost code being the Work order no, and with cost types that were used in the setup of resources.
6. Cost and revenue can then be assigned to the Work Order in the usual way by purchase orders, invoices, timesheets, etc.
7. Work order is then marked as complete, this enables the Work order to be invoiced.
8. Invoice is presented for approval (Approve Invoices menu option)
9. Invoice is then Posted (Menu option Invoice Posting)

Create Work Orders

From the Jobpac Main Menu select >Service Orders >Maintain Work Orders.

This displays a list of existing Work Orders. By default, only quote and approved status Work Orders are displayed. The Status filter can be changed to show Completed Work Orders (status 30)

Service System - Work Order/Quotation Maintenance : Details
[ACTIONS](#) [OK](#) [BACK](#)

DESCRIPTION CLASSIFICATION ALLOCATION INVOICING

Hide Apply
[XLS](#) [+](#) [<](#) [>](#) [...](#)

WOrder/ Quote	Description	Job	Contract	BT	Order Type	Sts	I/C	Inv'ed	Client	Client Name	Pri	Comp Date
Q0000002	Test Quote No 2	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000003	Test Quote No 3	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000004	Test Quote No 4	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000006	Test Work order	WOJOB		F	QUOTE	10	N		BRICOUNC	Brighton Council		

Add a New Work Order

Choose **Add WO/Quotn** from the Actions Menu to create a new Work Order.

Service System - Add/Copy Work Order/Quotation

 ACTIONS
 OK
 BACK

WO/Quotation

Contract No.

Client

Order Type

Status

Copy

WO/Quotation

Work Order Comments

Activity Comments

Field Name	Description
WO/Quotation	Leave blank to generate the next automatic Work Order number.
Contract No.	Enter the relevant Service Contract number, if required.
Client	Enter the Customer Code for the Work Order.
Order Type	Enter the required Order Type for the Work Order.
Status	Select the status as Quotation (10) or Approved (20). It will default to 10.
Copy WO/Quotation	If you wish to copy an existing Work Order or Quotation, enter the code, and whether Work Order and Activity comments are required to be copied.

Enter the required information above and press OK. The next screen will be presented.

Service System - Work Order/Quotation Maintenance : Details

 ACTIONS
 OK
 BACK

WO/Quote No. Q0000006 Status 10 Quote

Order Type QUOTE Quote Order Priority High Medium Low

Job WOJOB Workorder Job Asset Wkid Asset

Contract

Client Details :

Client BRICOUNC Brighton Council

Contact Jim Blake

Address 100 City Road

Suburb Brighton PC 5040

Telephone 0418844431 Fax

Email

Client Reference

Commence Date 16/06/2022 Completion Date

Invoice Method Advanced Invoicing On Completion

Department SUPPLY Supply of Goods

Initiated By

Allocated To Type Creditor Employee Other

Allocated To JIM Jim Blake

Region

Business Unit

Industry

User Defined 01

Site Details :

Site Code

Contact

Address

Suburb PC

Telephone Fax

Email

Service Mgr

% Complete

Print Detail on Invoice

Field Name	Description
WO/Quote No.	This number will be automatically created once the Work Order screen is completed and saved. Or you own number can be entered.
Description	The description entered on the first screen. Can be amended.
Status	As per the previous screen.
Order Type	As per the previous screen. Can be amended.
Priority	Select from High, Medium or Low.
Job	Select an available Job to link this Work Order to. This must be a Small order Job.
Asset Work Id & Asset	Link to an Asset, if the work is in relation to fixing that Asset.
Contract	Enter the contract number for this Work Order (if required).
Client	Client Code as per the previous screen. Name and address details default from the Client, and can be amended for this Work Order.
Site Details	Select a Site Code or enter details of the site to be serviced (if required). If present this is use as the address for the work order.
Client Reference	Enter the client reference for this Work Order.
Comm. Date	Enter the expected commencement date of the work.
Invoice Method	Select from Advance Invoicing or On Completion. If on completion is selected, invoices cannot be raised until the Work Order is completed.
Department	Enter the Department that will complete the service work. This will determine default GL accounts for the costs and revenue
Initiated By	Enter the Initiated By for this Work Order.
Allocated To Type	Select from Creditor, Employee or Other.
Allocated To	Select who or the group allocated to perform the work.
Region	Enter the Region (if used).
Business Unit	Enter the Business Unit (if used).
Industry	Enter the Industry Code (if used).
User Defined 1	Enter the text relating to this field (if it is required).

Note: Only Jobs that have been set-up as Small Orders type Jobs, and assign their General Ledger codes based on Service Orders can be selected.

Enter the required information above and select **More Details** from the Actions menu. The next screen will be presented.

Service System - Work Order/Quotation : More Details

WO/Quote No. Q0000006 Status 10 Quote

Client BRICOUNC Brighton Council Logged : User BOUDAM0 Date 16/06/2022 Time 9:05:29

Invoice Stop
 Work Order Billable

Agreed Discount %

Work Order Type Fixed Price Schedule Of Rates Cost Plus

Fixed Price Date

Cost Plus Markup %

Delivery Method

Warranty Method

Closure Method

Lost Reason

Fault Type

Forecast Award Date

Forecast Comp. Date

Percentage Win

Percentage Proceed

Service System – Work Order/Quotation : More Details

Field Name	Description
WO/Quote No.	The number of this Work Order.
Description	The description entered on the first screen. Can be amended.
Status	As per the previous screen.
Client	Client Code and name as per the previous screen.
Invoice Stop	Select if the invoice should be stopped from being produced. This can be changed later.
Work Order Billable	Select whether the Work Order is billable.
Agreed Discount %	Enter discount %age (if required).
Work Order Type	Select from Fixed Price, Schedule of Rates or Cost Plus.
Fixed Price Date	If Fixed price is selected, enter the date the price was agreed.
Cost Plus Markup %	If Cost Plus is selected, enter the markup percentage to be applied.
Delivery Method	Enter the Delivery Method (if used).
Warranty Method	Enter the Warranty Method (if used).
Closure Method	Enter the Closure Method (if used).
Lost Reason	Enter the Lost Reason (if used).
Fault Type	Enter the Fault Type (if used).
Forecast Award Date	Enter if required.
Forecast Comp. Date	Enter if required.
Percentage Win	Enter if required.
Percentage Proceed	Enter if required.

Enter Module Name Here

Adding Activities

Enter the required information above and press OK to get back to the Work Order Maintenance screen. Select **Activity** for the drop down list. Now list the different activities required to achieve the Work Order. One called Nonstock has already been selected.

Service System - Activity Listing
ACTIONS OK BACK

Client	BRICOUNC	Brighton Council	Price	1,800.00
Client Address	100 City Road		Labour Costs	1,500.00
	Brighton	5040	Material Costs	0.00
WO/Quotation	Q0000006	Test Work order	Plant Costs	0.00
Status	10	Quote	Total Costs	1,500.00
			Margin	300.00

Hide
< > ...

From	From	Contains	From	From	=	From	<input checked="" type="checkbox"/> Complete
To	To		To	To		To	<input checked="" type="checkbox"/> Incomplete

Seq	Activity	Description	Equipment	Department	AT	Allocated To	Bill?	Cmp	Prt	Commence Date	Rsc Lvl Bill?	Invoice #
1	NONSTOCK	Non Stock Supplies		SUPPLY	O	JIM	Y	N	Y	16/06/2022	Y	

Service System – Activity Listing

Field Name	Description
Seq	Sequence number of the Activities.
Activity/Comments	Activity Code of the work to be performed, Use Prompt to bring up list of pre-defined options. (see previous section)
Description	Description of the selected Activity Code.
Equipment	Equipment item to be serviced, Use Prompt to bring up list of options. Not Mandatory.
Department	Department Code of the business to perform the service work, Use Prompt to bring up list of options. This is mandatory.
AT Typ	Enter the Allocated To Type – (C)reditor, (E)mployee or (O)ther.
Allocated To	Enter who the work is allocated to, Use Prompt to bring up selections.
Bill ?	Enter whether the Activity is billable (Y/N).
Cmp	Enter whether the Activity is completed (Y/N).
Prt	Enter whether you want the Activity to be printed on the Work Order (Y/N).
Comm Date	Date will default to the start date recorded previously, but can be altered if required.
Rsc Lvl Bill ?	Enter if you want Resource Level Billing (Y/N). If Y, this will list all the Resources that make up that Activity on the Invoice.
Invoice No	If an invoice has been produced, this will display the invoice no.

Enter the required information above and press OK. Select Previous to get to the main screen.

Enter Module Name Here

Adding Resources for Each Activity

Service System - Activity Listing

Client: BRICOUNC Brighton Council Price: 1,800.00
 Client Address: 100 City Road Labour Costs: 1,500.00
 Brighton 5040 Material Costs: 0.00
 WO/Quotation: Q0000006 Test Work order Plant Costs: 0.00
 Status: 10 Quote Total Costs: 1,500.00
 Margin: 300.00

Hide Apply

From From Contains From From = From From Complete
 To To To To To To Incomplete

Seq	Activity	Description	Equipment	Department	AT	Allocated To	Bill?	Cmp	Prt	Commence Date	Rsc Lvl Bill?	Invoice #
1	NONSTOCK			SUPPLY	O	JIM	Y	N	Y	16/06/2022	Y	

Resources
Schedules
Delete
Activity Details
Comments
Prompt

Right click and choose “Resources” to outline the details of what is required for this Activity.

Service System - Activity Maintenance

Client: BRICOUNC Brighton Council Price: 1,800.00
 Client Address: 100 City Road Labour Costs: 1,500.00
 Brighton 5040 Material Costs: 0.00
 WO/Quotation: Q0000006 Test Work order Plant Costs: 0.00
 Status: 10 Quote Total Costs: 1,500.00
 Activity: NONSTOCK Margin: 300.00

Hide Apply

From Contains From
To To Resource type (L)abour (M)aterial (P)lant Price (O)nly

Seq #	Resource	RT	CT	SC	Quantity	Dur (Hrs)	UOM	Cost Rate	Mkup %	Price	Cost	Bill	Inv
10	Labour	L	MT	N	20.0000		HRS	75.0000	20.00	1,800.00	1,500.00	Y	N

Field Name	Description
Seq	Sequence number of the Resource.
Resource	Description of the selected Resource. Using right mouse click, there are options here. Prompt Resource. This provides a list of existing Rates for this Activity. Prompt Product. This is a lookup of all product codes. Extended Description. A long description can be added
RT	This is either L, M, P
CT	The Cost Type for the resource, from the list of cost types for the Job

Enter Module Name Here

SC	Select Y if this work is undertaken by a subcontract agreement
Quantity	QTY for the Resource
Dur (hrs)	This is the duration of the activity. Cost and Price = QTY * DUR*Cost Rate
UOM	Unit of Measure
Rate	Cost Rate
MkUp	This will calculate the selling price.
Price	Selling Price
Cost	QTY*DUR*Rate
Bill	Y if this is to appear on the invoice
Inv	This is Y if an invoice has already been produced.

Modifying Work Orders

Once Work Orders have been created there are a variety of maintenance functions that can be taken.

From the Jobpac Main Menu select *>Service Orders >Maintain Work Orders*

Select a Work Order by right clicking to reveal the actions that can be performed:

The screenshot displays the Jobpac software interface for maintaining work orders. At the top, there are search filters for 'From' and 'To' dates, and a table of work orders. The table has columns for WOrder/Quote, Description, Job, Contract, BT, Order Type, Sts, I/C, Inv'ed, Client, Client Name, Pri, and Comp Date. The row for 'Test Work order' (WOrder/Quote: Q0000006) is highlighted in blue. A context menu is open over this row, listing various actions such as Change, Copy, Delete, Display, Approve, On-Site Equipment, Activity, Complete WO, Uncomplete WO, Print, Copy General Information Only, Hold Quotation, Cost Plus Transactions, Actuals, Purchase Orders, A/R Enquiry, Issue Materials, and Reset WO To Quote.

WOrder/Quote	Description	Job	Contract	BT	Order Type	Sts	I/C	Inv'ed	Client	Client Name	Pri	Comp Date
Q0000002	Test Quote No 2	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000003	Test Quote No 3	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000004	Test Quote No 4	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000006	Test Work order	WOJOB		F	QUOTE	20	N		BRICOUNC	Brighton Council		
Q0000007	New Quote for supply of...	WOJOB							BRICOUNC	Brighton Council		

Enter Module Name Here

Change

Selection of this option will take you to the Work Order/Quotation Maintenance screen and any changes required can be made.

Copy

Service System - Add/Copy Work Order/Quotation
ACTIONS OK BACI

WO/Quotation

Contract No.

Client Brighton Council

Order Type Quote Order

Status

Copy

WO/Quotation Test Work order

Work Order Comments

Activity Comments

Enter the new WO/Quotation No, and select Ok. This will display the details of the nominated WO/Quotation, which can be saved. All aspects of the Work Order, including Activities and Resources are copied.

Delete

A Work Order can only be deleted if it is still in Quote status.

Display

This displays the Work Order, but does not allow any Changes.

Approve

Select to Approve a Quotation will present the screen below. Each Activity is listed and requires approval.

Note: A User has to have an appropriate Work Order Approval Limit value to successfully use this function.

Work Orders
ACTIONS OK BACI

WO/Quote No Q0000006 Test Work order Status 10 Quote

Client BRICOUNC Brighton Council

Job WOJOB Workorder Job Asset Wkid Asset

Approved By BOUDAMO Date 26/06/2022

Activity	Description	Job	Contract No.	Department	Total Costs	Price
NONSTOCK	Non Stock Supplies	WOJOB		SUPPLY	7,500.00	9,000.00

Press OK and you will presented with the confirmation message shown above. Select "Yes" to confirm the Work Order approval. This does not prevent further changes to the Work Order.

On-Site Equipment

Service System - On-Site Equipment
[ACTIONS](#) [OK](#) [BACK](#)

Client BRICOUNC Brighton Council

Client Address 100 City Road

Work Order Brighton 5040
Q0000006 Test Work order

Hide

From	Contains	Contains	Contains
To			To

Equipment	Description	Location	Quantity
E-PUMP	Emergency Water Pump	On site	1,000

Right click and choose “Select” to see more details. Press Previous to move back to the main screen.

Activity

This option was described earlier

Complete Work Order

This changes the Status to Complete. Enter the Completion Date and press OK.

No further activity can occur.

Un-complete WO

This changes the status back to Approved.

Copy General Information Only

This function initiates the Copy Work Order feature, but does not copy Activities or Resources.

Hold Quotation

This changes the status to 70 ‘On Hold’

Cost Plus Transactions

This list transactions processed for Cost Plus Work Orders

Actuals

This lists all Actual costs for the Work Order

Purchase Orders

This lists all Purchase orders for the Work Order

A/R Enquiry

This lists AR Invoices for the work Order

Enter Module Name Here

|

Issue Materials

Enter the Date, Stock Code, Warehouse, quantity and Activity at the bottom of the screen and press OK to confirm.

Job Number		WOJOB	Workorder Job								
Asset											

Hide Apply
< > ...

Invoices not yet issued

From	From	Frn	From	Contains	From	From	From	Frn
To	To	To	To		To	To	To	To

Date	Stock Code	WH	Locn	Description	Quantity	Unit	Rate	Cost	Activity	CT
26/06/2022	I-001	01	STORE	Insert - Hallway Panel	4.0000	EACH	0.5000	2.00	NONSTOCK	MT

< > ...

Enter new issue materials

26/06/2022	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
------------	----------------------	----------------------	----------------------	----------------------	----------------------	----------------------

Reset Work Order to Quote

Approved Work orders can be set back to Quote

Enter Module Name Here

Invoicing Work Orders

Work Orders that have been flagged as Completed, or have the relevant Activity marked as complete will be available to be approved and invoiced.

Approve Invoices

From the Jobpac Main Menu select >Service Orders >Approve Invoices

Note: Job security applies in relation to approving invoices, so only Jobs a User has access to (where that Job is linked to the relevant Work Order) can be Approved.

Service System - WO Invoice Approval ACTIONS OK BACK

Hide Apply < > ...

From Contains From = From From From From Approved

To To To To To To To Not Approved

Work Order	Description	Activity	BT	Amt To Be Invoiced	GST Amount	Total Invoice Amt	Client	Name	App
Q0000006	Test Work order	NONSTOCK	F	9,000.00	900.00	9,900.00	BRICOUNC	Brighton Council	N
Q0000006	Test Work order	OTHER	F	360.00	36.00	396.00	BRICOUNC	Brighton Council	N

Right click to bring up options to 'Change Invoice Amount/Tax', 'Approve', or 'Withdraw Approval'.

Service System - WO Invoice Approval ACTIONS OK BACK

Hide Apply < > ...

From Contains From = From From From From Approved

To To To To To To To Not Approved

Work Order	Description	Activity	BT	Amt To Be Invoiced	GST Amount	Total Invoice Amt	Client	Name	App
Q0000006	Test Work order	NONSTOCK	F	9,000.00	900.00	9,900.00	BRICOUNC	Brighton Council	N
Q0000006	Test Work order	OTHER	F	360.00	36.00	396.00	BRICOUNC	Brighton Council	N

Change Invoice Amount/Tax

Approve

Withdraw Approval

Change Invoice Amount/Tax

SS - WO Invoice Approval : Change Invoice Amount ACTIONS OK BACK

Work Order Q0000006 Test Work order

Activity NONSTOCK

Hide Apply < > ...

Labour Material Plant

Contains Frm From From From From From

To To To To To To To

Resource	Res Typ	CT	Price	Unit	Incl	Quantity	Rate	Amt To Be Invoiced	GST Code	GST Amount	Total Invoice Am
Gloves Latex Powdered	L	MT	9,000.00	HRS	Y	100.0000	90.0000	9,000.00	S1	900.00	9,900.00

Enter Module Name Here

The QTY and Rate associated with the Resources can be altered if required.

You can eliminate some of the resource items used in the build-up of the billing amount.

Select **Actual Costs** from the **Actions** Menu, to see cost transactions recorded against the Resource.

Select to add or review comments by choosing **W/O Comments** or **Invoice Comments** from the Actions menu.

Approve Invoice

Right click on an Activity and select the option 'Approve'. This will set the value in the last column to "Y".

Withdraw Approval

Right click on the Activity and select the option 'Withdraw Approval'. This will set the value in the last column to "N".

Bulk Approval/Bulk Withdraw Approval

If you select one of these options from the Actions menu, it will impact the Activities (having regard for Job access security) that are displayed based on the filter selections at the bottom of the screen.

Note: Approved Invoices will display here until the following step to Post Invoices has been completed.

Post Invoices

From the Jobpac Main Menu select >Service Orders >Invoice Posting

Work Order	Description	Activity	Client	Job	GST Amount	Total Invoice Amount
Q0000004	Test Quote No 4	NONSTOCK	BRICOUNC	WOJOB	0.19	2.08
Q0000004	Test Quote No 4	OTHER	BRICOUNC	WOJOB	10.00	110.00
Q0000004	Test Quote No 4	STOCK	BRICOUNC	WOJOB	26.46	291.01

To Post an invoice, right click a specific activity and choose **Post**. To post all activities for a Work Order use the **Post All** option in the Actions Menu.

Selecting **Print All** or **Post All** will work based on the filtered selections of Invoices displayed.

A reprint of the Invoice can be done using the **W/O Invoice Reprint** Menu option.

Enter Module Name Here

Create/Maintain Service Contracts

Service contracts are optional for use in the system, but are required if contracts to complete scheduled maintenance and regular billing for services are required.

Create Contracts

From the Jobpac Main Menu select >Service Orders > Maint. Service Contracts

Service System - Contract Listing
ACTIONS OK BACK

Hide Apply
+ < > ...

Active
 Complete
 Fin. Complete

Client	Contract	Description	Status
BRICOUNC	CONTRACT1	Maintenance Contract for Brighton council	A

To add a contract, select **Add New Contract** from the Actions Menu.

Service System - Contract Maintenance
ACTIONS OK BACK

Job number Workorder Job

Client Brighton Council

Contract number Maintenance Contract for Brighton council

Contract status Active Complete Financially Complete

Contract type

Contract value

Commencement date Completion date On-going Contract

Customer Reference If on-going, number of years to generate schedules

Department Supply of Goods

Region

Business Unit

Industry

Warranty Method

User Defined 01

Work Order

Service Manager

Client details :

Contact

Address

Suburb PC

Telephone Fax

Email

Site details :

Site Code

Contact

Address

Suburb PC

Telephone Fax

Email

Field Name	Description
Job Number	Select a Job number to be used for this contract.
Client	Select a valid Customer code to use for the contract.
Contract Number	Enter the required contract number for this contract.
Description	Enter a description of the contract.
Contract Status	Select from the options of Active, Complete or Financially Complete.
Contract Type	Select a valid Contract Type from the table.
Contract Value	Contract value is established from the attached Job.
Commencement & Completion dates	Enter the contract period, and whether it is an on-going contract. If so, record the number of years maintenance schedules will be required for this contract.
Customer Reference	Enter the Customer reference for this contract.
Department	Enter the Department that will complete the service work. Mandatory
Region	Enter the Region (if used) the contract is in.
Business Unit	Enter the Business Unit (if used) the contract is managed by.
Industry	Enter the Industry Code (if used).
Warranty Method	Enter the Warranty Method (if required) relating to the Equipment.
User Defined 1	Enter the text relating to this field (if it is required).
Work Order	This field is reserved for future enhancements.
Service Manager	Enter the Name of person responsible
Client Details	The details will default as per the Customer Code, but can be altered to suit the specific needs (which will not alter the Customer information).
Site Details	Optional details can be recorded of the Site to be serviced, including creating a Site Code if required.

Enter the required information above and press OK to present the second screen of contract information.

Service System - Contract Maintenance

ACTIONS
OK
BACK

Client

Contract number

Start invoice date

End invoice date

Invoice method

Invoice Stop

Mark up %

Visit day - week #

Visit time

Customer contact

Service Stop

Comments

BRICOUNC Brighton Council

CONTRACT1 Maintenance Contract for Brighton council

Advance Invoicing On Completion

1st Week 2nd Week 3rd Week 4th Week None

Monday Tuesday Wednesday Thursday Friday Saturday Sunday None

- (HH:MM - HH:MM)

Robert

Service System – Contract Maintenance

Enter Module Name Here

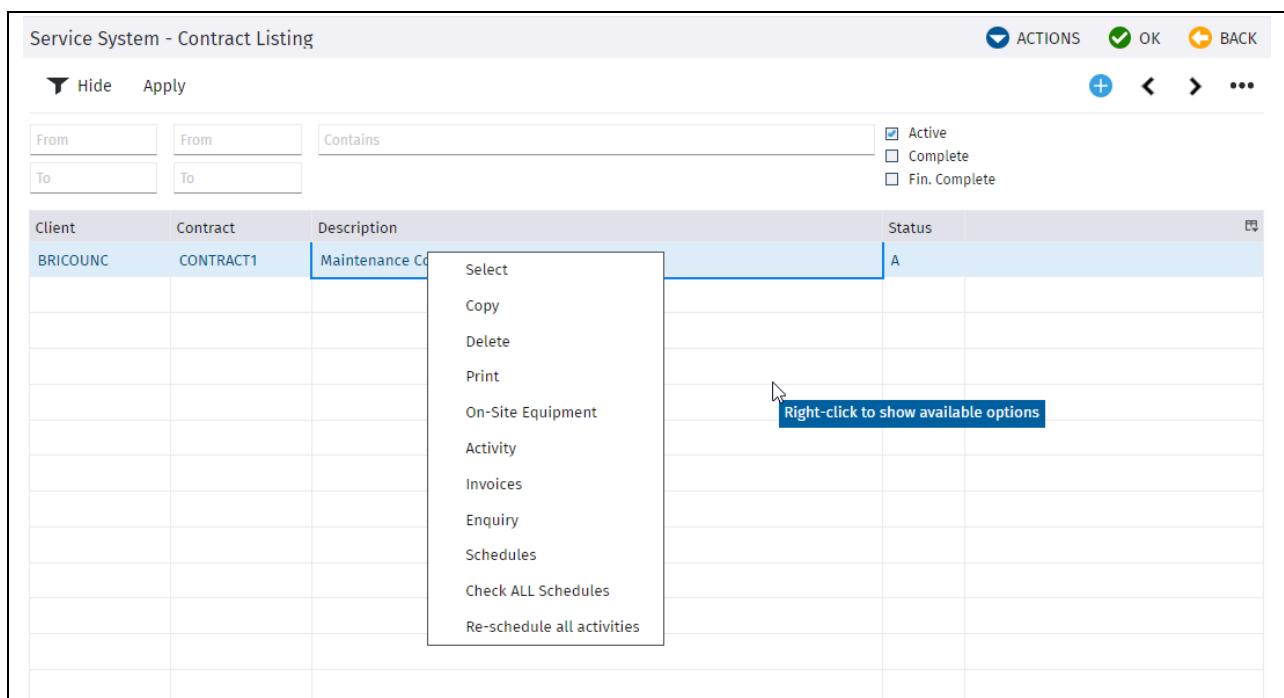
Field Name	Description
Start & End Invoice Dates	Enter the invoicing period for the contract.
Invoice Method	Select from Advance Invoicing or On Completion.
Invoice Stop	Select this if you require invoicing to be stopped.
Mark Up %	Record the mark up percentage to be used.
Visit Week, Day & Time	Select the preferred day and time for scheduled maintenance to be completed (if required).
Customer Contact	Enter the site contact for this contract.
Service Stop	Select this if you require services to be stopped.
Comments	Enter any additional information that needs to be identified.

Maintain Contracts

Contracts that have been created have various maintenance and enquiry options them.

From the Jobpac Main Menu select >Service Orders > Maint. Service Contracts

Select a contract by right clicking to reveal the actions that can be performed:



Select Contract

Selection this option will take you the main data screen where fields can be amended accordingly.

Copy Contracts

Select the Client Code and Contract Number to create, and whether to copy Equipment and Activities. Click OK to save.

Enter Module Name Here

On-Site Equipment

This lists equipment to be maintained on-site

Service System - On-Site Equipment

 ACTIONS
 OK
 BACK

Client BRICOUNC Brighton Council

Client Address 100 City Road

Brighton 5040

Contract Number CONTRACT1 Maintenance Contract for Brighton council

Hide
 Apply

From Contains Contains Contains

To To

Equipment	Description	Location	Quantity
E-PUMP	Emergency Water Pump	Building A	1,000

Select the option **Add New Equipment** from the Actions menu to add a new item.

Activity

Lists activities for the contract, similar to those for Work Orders

Service System - Activity Listing

 ACTIONS
 OK
 BACK

Client BRICOUNC Brighton Council

Client Address 100 City Road

Brighton 5040

Contract number CONTRACT1 Maintenance Contract for Brighton council

Hide
 Apply

From From Contains From From From Complete

To To To To To Incomplete

Seq	Activity/Comments	Description	Equipment	Department	AT Typ	Allocated To	Cmp	Prt	Comm Date
10	010		E-PUMP	SUPPLY	O	JIM	N	Y	4/07/2022
20	020		E-PUMP	SUPPLY	O	JIM	N	Y	4/07/2022
30	030		E-PUMP	SUPPLY	O	JIM	N	Y	4/07/2022

Click on a line to edit an Activity, double click to drill to the Resources required for this Activity, or click on the next blank line to add a new Activity.

Resources for an activity can be added in a similar fashion as for Work Orders

Field Name	Description
Seq	Sequence number of the Activities.
Activity/Comments	Activity Code of the work to be performed, enter “?” to bring up list of options.
Description	Description of the selected Activity Code.
Equipment	Equipment item to be serviced, enter “?” to bring up list of options.

Enter Module Name Here

Department	Department Code of the business to perform the service work, enter “?” to bring up list of options.
AT Typ	Enter the Allocated To Type – (C)reditor, (E)mployee or (O)ther.
Allocated To	Enter who the work is allocated to, enter “?” to bring up a list of options.
Cmp	Enter whether the Activity is completed (Y/N).
Prt	Enter whether you want the Activity to be printed (Y/N).
Comm Date	Date will default to the start date of the contract, but can be altered if required.

Invoices

Selection of this option will present the Debtors Enquiry screen for the Customer Code on the contract.

Enquiry

This will present an enquiry screen of the Activities on this contract with a summary of Costs and Revenue to date.

Service System - Contract Enquiry : Activity Level						ACTIONS	OK	BACK
Contract	CONTRACT1	Maintenance Contract for Brighton council						
Job	WOJOB	Workorder Job						
<input type="button" value="Hide"/> <input type="button" value="Apply"/>						<input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="⋮"/>		
From	Contains							
To								
Activity	Description	Total Revenue	Actuals	Margin				
010								
020								
030								

Schedules

Service System - Schedule Listing														ACTIONS	OK	BACK
Client	BRICOUNC	Brighton Council														
Client Address	100 City Road															
Contract Number	Brighton	5040														
	CONTRACT1	Maintenance Contract for Brighton council														
<input type="button" value="Hide"/> <input type="button" value="Apply"/>														<input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="⋮"/>		
From	Contains															
To																
(select By Entering An 'x')																
Activity	Description	1D	2D	3D	4D	5D	1W	2W	1M	3M	6M	1Y				
010						X										
020								X								
030										X						

Enter the required scheduled maintenance to be performed in relation to each Activity.

Enter Module Name Here

Check All Schedules

Service System - Schedule Maintenance

 ACTIONS
 OK
 BACK

Client: BRICOUNC Brighton Council

Client Address: 100 City Road

Contract Number: CONTRACT1 Brighton 5040
Maintenance Contract for Brighton council

Hide Apply < > ...

From From To To

Checked
 Not Checked

Activity	Week Ending Date	Interval	Description	Checked
010	23/08/2022	5D	5 Days	N
010	12/10/2022	5D	5 Days	N
010	1/12/2022	5D	5 Days	N
020	25/11/2022	2W	2 Weeks	N
030	7/10/2022	3M	3 Months	N

Re-schedule All Activities

Selection of this option will enable the re-generation of the scheduled maintenance dates for all Work Orders that have been created for the contract. The following message will appear:

Service System - Contract Listing

 ACTIONS
 OK
 BACK

Hide Apply + < > ...

From From Contains To To

Active
 Complete
 Fin. Complete

Client	Contract	Description	Status
BRICOUNC	CONTRACT1	Maintenance Contract for Brighton council	A

Confirm ✕

You are about to change the schedules.

Do you wish to proceed?

Yes
 No

CONFIRMUPD01

Select "Yes" to confirm the change to be made to the schedules.

Enter Module Name Here

Scheduled Maintenance

Individual Service contracts will have a number of Activities attached with varying scheduled maintenance intervals for the equipment. These need to be generated as individual Work Orders so the work can be performed.

From the Jobpac Main Menu select >Service Orders > Generate Run Sheets

Service System - Work Order Generation
ACTIONS OK BACK

Start Client	<input type="text" value="BRICOUNC"/>	⌵	Brighton Council
Finish Client	<input type="text" value="CASHSALE"/>	⌵	Cash sales of Stock
Start Contract	<input type="text" value="CONTRACT1"/>	⌵	Maintenance Contract for Brighton council
Finish Contract	<input type="text" value="CONTRACT1"/>	⌵	Maintenance Contract for Brighton council
Start Department	<input type="text" value="SUPPLY"/>	⌵	Supply of Goods
Finish Department	<input type="text" value="SUPPLY"/>	⌵	Supply of Goods
Start Region	<input type="text"/>	⌵	
Finish Region	<input type="text"/>	⌵	
Start Business Unit	<input type="text" value="SUPPLY"/>	⌵	Supply of Goods
Finish Business Unit	<input type="text" value="SUPPLY"/>	⌵	Supply of Goods
Start Date	<input type="text" value="5/07/2022"/>	📅	
Finish Date	<input type="text" value="5/07/2022"/>	📅	

Service System – Work Order Generation

Field Name	Description
Start & Finish Client	Enter the range to be generated.
Start & Finish Contract	Enter the range to be generated.
Start & Finish Department	Enter the range to be generated.
Start & Finish Region	Enter the range to be generated.
Start & Finish Business Unit	Enter the range to be generated.
Start & Finish Date	Enter the range to be generated.

Service System Reports

There is a set of reports available from the Service Orders Module. These would be complemented by some relevant Project reports that are not shown here.

Incomplete Contract Work Orders Report

Work Order Advance Invoicing Report

Work Order WIP and Underclaim Report

Work Order Reprint Report

Equipment List Report

Work Order Profit & Loss Report

Work Order Hours To Be Done Report

Work Order Invoice Reprint

Work Order Financial Status Report