



Mojo Works

Guide for Users and Administrators

| Edition | Author | Date | Mojo Version | Comments |
|---------|--------------------------|------------|--------------|-------------|
| 1.0 | Software Innovation Team | 07/01/2025 | V6.90.10+ | Version 1.0 |

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1 Welcome to Mojo Works

Welcome to Mojo Works, the powerful works management add-on for Mojo. This guide will help you get started with using Mojo Works to manage contracts, jobs, and purchase orders as well as invoices related to property management.

1.1 What is Mojo Works?

Mojo Works is an integrated module within Mojo that allows your organisation to:

- Generate and approve purchase orders
- Upload and manage contracts with suppliers
- Raise and track jobs across your portfolio
- Link incoming invoices to purchase orders or contracts for rapid processing

Mojo Works streamlines the process of managing property maintenance and improvement by providing a central system to handle all aspects of works management. It integrates seamlessly with the rest of Mojo to provide a complete property management solution.

Key features include:

- Purchase order generation, multi-level approval workflows and individual assignment
- Contract management with scheduled job creation
- Ad hoc job creation and tracking
- Invoice matching and processing
- Full audit history

Whether you're a property manager raising jobs or orders, a finance team member processing invoices, or an administrator configuring the system, this guide will help you make the most of Mojo Works.

2 User Guide

2.1 Getting Started

Accessing Mojo Works

Mojo Works is accessed through the main Mojo system. To get started:

1. Log into Mojo using your usual credentials
2. Click on the main menu icon in the top left corner
3. Select "My Works" from the menu options

Alternatively click the Works icon on the system bar:

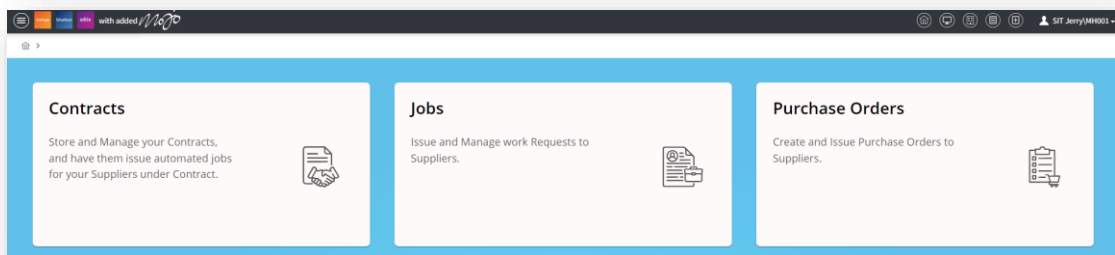


This will take you to the Mojo Works home page.

If you do not see the My Works option in your menu or the Works icon, please contact your system administrator to ensure you have the correct Add On enabled.

2.2 Home Page

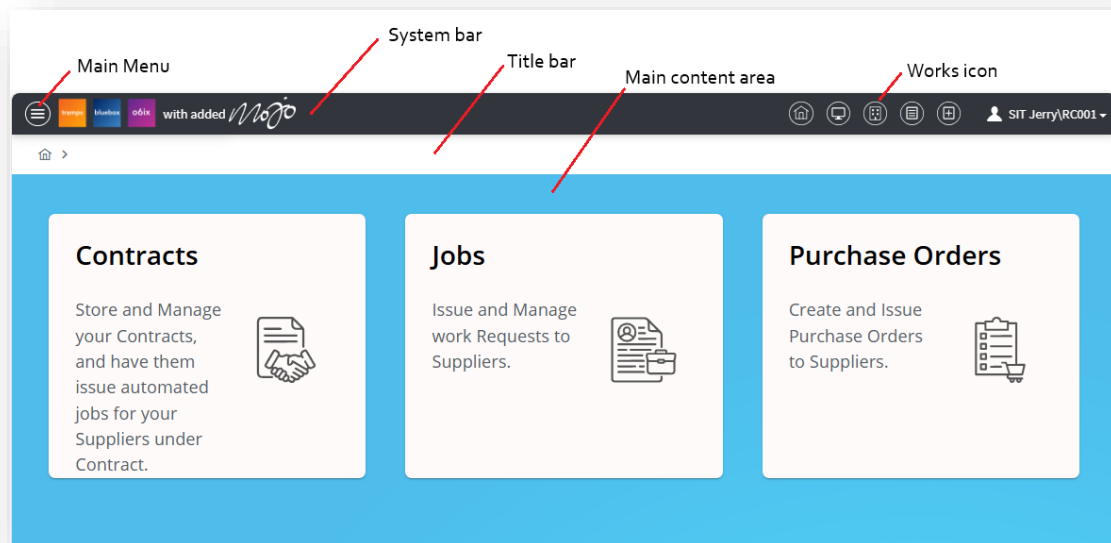
The Home Page of Mojo Works gives you quick access to all the main areas: Contracts, Jobs and Purchase Orders, without having to open the burger menu:



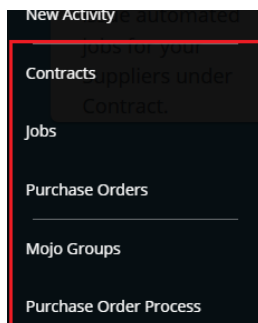
Simply click on the Contracts, Jobs or Purchase Orders tile to access that area of the system.

2.3 Navigation

The main Mojo Works interface consists of several key areas:



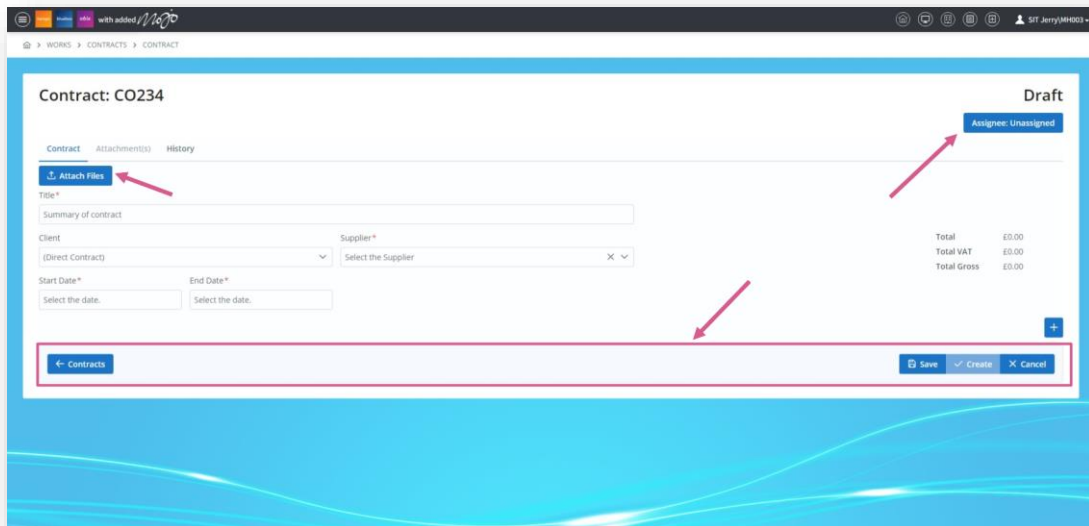
- **Main Menu** – within Mojo Works, the main menu displays has additional options that are specific to Works:



- **System bar** - Access to main Mojo navigation and user options, with access to main Mojo Works areas (Contracts, Jobs, Purchase Orders, Invoices)
- **Title bar** – Displays where you are in the system. For Works, this is displayed as a clickable breadcrumb layout, enabling some navigation (e.g. from a purchase order back to the purchase order list or Works home page).
- **Main content area** - Displays lists, forms and details for the selected area

Within lists and form screens:

- **Action buttons** – Blue contextual buttons are used for creating new items or taking actions:



So, to navigate around Mojo Works, you can:

- use the top left menu to navigate between the main areas of Mojo Works,
- click the breadcrumb menu on the title bar, or
- use the exit buttons to return from an item to its lister page.

2.4 Purchase Orders

Purchase orders (POs) in Mojo Works allow you to formally instruct suppliers and track financial commitments.

2.4.1 Purchase Order List

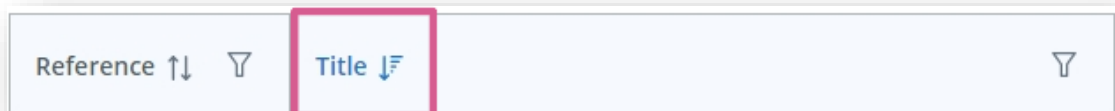
| Purchase Orders | | | | | | | | | |
|--------------------------|------------|------------------------|------------------|---|----------|------------|---------------------------|--------|--|
| + New Purchase Order | | | | | | | | | |
| Purchase Order Reference | Due Date | Supplier | Total Net Amount | Location | Assignee | Issued On | Created By | Status | |
| PO567 | 22/01/2025 | Office Supplies Co Ltd | £15.00 | 679 - Test Place Towers | | 22/01/2025 | Alex Smith - Approver 2 | Issued | |
| PO566 | 21/01/2025 | Office Supplies Co Ltd | £25.00 | 679 - Test Place Towers | | 21/01/2025 | Alex Smith - Admin | Issued | |
| PO565 | 21/01/2025 | EDF Energy | £1,100.00 | 101 - Eastfields Shopping Centre (name) | | 21/01/2025 | Christopher Young - Admin | Issued | |
| PO564 | 21/01/2025 | EDF Energy | £30.00 | 101 - Eastfields Shopping Centre (name) | | 21/01/2025 | Christopher Young - Admin | Issued | |
| PO563 | 20/01/2025 | PAC Cleaning Ltd | £3.00 | 101 - Eastfields Shopping Centre (name) | | 20/01/2025 | Christopher Young - Admin | Issued | |
| PO562 | 20/01/2025 | PAC Cleaning Ltd | £1.00 | 101 - Eastfields Shopping Centre (name) | | 20/01/2025 | Christopher Young - Admin | Issued | |

On the Purchase Order lister page you can find the following columns:

- **Purchase Order Reference** – the unique reference for the purchase order
- **Due Date** – due date set on the purchase order screen
- **Supplier** – the name of the supplier type creditor selected on the purchase order

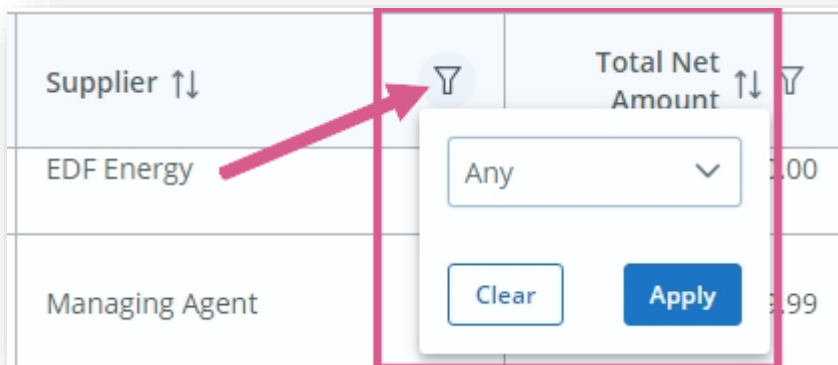
- **Total Net Amount** – displays the value of the whole purchase order, adding up each line item
- **Location** – the property/unit the purchase order related to. If multiple selected, will display 'multiple locations'
- **Assignee** – the user assigned to the purchase order
- **Issued On** – the date the purchase order been issued to the supplier
- **Created By** – the name of the user who created the purchase order
- **Status** – the status of the purchase order

You can sort the lister by most of the columns, by simply clicking on the desired column header. The selected column will have a sorting indicator and highlighted text:



Clicking on the column header again will change the sorting order.

You can also filter by each column, using the filter button on the right end of each column header



2.4.2 A Quick Tour of a Purchase Order

To create a new PO, from the Purchase Order list page, click "New Purchase Order". A new purchase order in the **Draft** state will appear on screen:

The screenshot shows the 'Purchase Order: PO572' form in the 'Draft' state. The form is titled 'Purchase Order: PO572' and has a 'Draft' status in the top right corner. Below the title, there are tabs for 'Order', 'Preview', and 'History'. The 'Order' tab is active. The form contains several fields: 'Due Date*' (a date picker), 'Supplier*' (a dropdown menu), and a table for items. The table has columns for 'Net', 'Vat', and 'Gross'. The first item is 'Item 1 -' with a 'Net' value of '£0.00'. Below the table, there are fields for 'Location*', 'Quantity*', 'Unit Cost*', and 'VAT Rate*'. The 'Location*' field has a search bar. The 'Quantity*' field has a value of '1'. The 'Unit Cost*' field has a value of '£0.00'. The 'VAT Rate*' field has a value of 'The Vat Rate'. Below these fields, there are fields for 'Transaction Type*', 'Effective Date*', 'From Date', and 'To Date'. The 'Transaction Type*' field has a dropdown menu. The 'Effective Date*' field has a date picker. The 'From Date' field has a date picker. The 'To Date' field has a date picker. Below these fields, there is a 'Description*' field with a placeholder text: 'Please provide as much detail as possible on items or work required.'

The Header section:

The screenshot shows the header section of the 'Purchase Order: PO572' form. It is titled 'Purchase Order: PO572' and has a 'Draft' status in the top right corner. Below the title, there are tabs for 'Order', 'Preview', and 'History'. The 'Order' tab is active.

The header section is common throughout Contracts, Jobs and Purchase Orders.

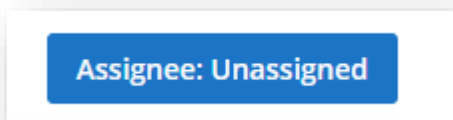
- The top left shows the assigned **(PO / Contract or Job) Reference**. References are assigned automatically.

Purchase Order: PO572

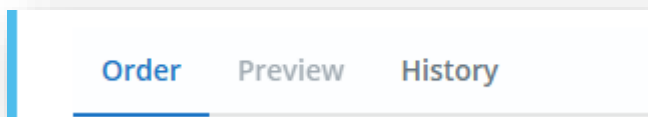
- The top right shows the current **State** of the (PO / Contract or Job) this changes automatically as the purchase order is submitted / approved etc.

A white rectangular button with a blue border and a blue shadow. The word "Draft" is centered in a bold, black, sans-serif font.

- Below the state, is the **Assignee button**. This both displays the current assignee and by clicking it allows you to assign the record to any other user who is allowed to perform the next action.

A white rectangular button with a blue border and a blue shadow. It contains a blue rectangular button with the text "Assignee: Unassigned" in white, sans-serif font.

- At the bottom left of the header there are several tabs, In the case of a purchase order, the tabs are **Order**, **Preview** and **History**:

A white rectangular header bar with a blue border and a blue shadow. It contains three tabs: "Order", "Preview", and "History". The "Order" tab is selected, indicated by a blue underline and a blue shadow.


Order is the working page for entering your Purchase order information (selected by default).

Preview is a preview of the order document that will be sent to the supplier. This is disabled until the Order is in the Ready state.

History is the audit trail of all actions that have taken place for this particular order, both automatic and manually initiated. Clicking History when the purchase order is first started will give you:

Purchase Order: PO572

Order
Preview
History



Create Draft

22 January 2025 at 11:12:26 GMT

Previous State: Initial

New State: Draft

Actioned By: Norman Foster

← Purchase Orders

The Document Section:

Order
Preview
History

Due Date*

Select the due date.

Supplier*

Select the Supplier. ▾

Total Net

£0.00

Total VAT

£0.00

Total Gross

£0.00

The document section contains:

- The **Due Date** that the order is required and **Supplier** (i.e. Supplier creditor) that is being instructed:

Order
Preview
History

Due Date*

Select the due date.

Supplier*

Select the Supplier. ▾

- The running **Totals** (Net, VAT and Gross) of the items entered in the order:

| | |
|--------------------|-------|
| Total Net | £0.00 |
| Total VAT | £0.00 |
| Total Gross | £0.00 |

The Line Items Section:

| | Net | Vat | Gross |
|----------|-------|-----|-------|
| Item 1 - | £0.00 | | |

Location*

Start typing to search...

▼

Quantity*

1

Unit Cost*

£0.00

VAT Rate*

The Vat Rate

▼

Transaction Type*

Select the Transaction Type.

▼

Effective Date*

Select the effective date

From Date

Select the from date.

To Date

Select the to date.

Description*

Please provide as much detail as possible on items or work required.


Create job when issued


☐

You can have one or more items in a purchase order. Each item is topped by a **line-item bar**:


| | Net | Vat | Gross |
|----------|-------|-----|-------|
| Item 1 - | £0.00 | | |

This gives the item number, the first part of the description (when entered), the net, vat and gross amount, and icons for:

 deleting the item and

 Hiding / showing the details of the item.

Below the item(s), click the  icon to add a new item.

Above the item table, the  icon will hide / show detail of all items at once.

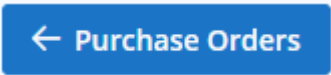



The fields within the item detail section are described in the **Creating a Purchase Order** section.

Instructions to Vendor:

This section is for any special instructions to the Supplier regarding the whole order. This will be printed on the instruction to the supplier.

Command Bar:

At the bottom of the purchase order form is the command bar.

| | |
|---|---|
|  | Returns the user to the purchase order list. |
|  | Saves changes that have been made. This will be greyed out / disabled if no changes have been mad. |
|  | Submits the form for validation / approval. Will be greyed out / disabled if the mandatory information has not been provided. |
|  | Displays a Confirmation box – once you confirm that you want to proceed, The system will cancel the Purchase Order. |

2.4.3 Creating a Purchase Order

To create a new PO:

1. Click "Purchase Orders" on the Works Home Page or in burger menu to access the Lister Page.
2. Click "New Purchase Order"
3. Fill in the field on Document level:
 - **Due Date** – the due date for the line items
 - **Supplier** - the supplier type creditor who will receive the purchase order
4. One line item will be open on screen automatically. Add more if required by clicking the '+' icon below the item. For each line item, fill in the item level fields:
 - **Location** – the property/unit related to the purchase order
 - **Quantity** – indicates the quantity of the units with cost associated. Defaults to 1, must be bigger than 0
 - **Unit Cost** – the price of each unit on this line item
 - **VAT Rate** – the VAT rate applied to the line item
 - **Transaction Type** and Relevant Coding – allows you to select the transaction type and relevant coding, such as Schedule and Expense Code, which will pull through to your Creditor Invoice form.
 - **Item Effective Date** – Populates the Effective Date field on the Creditor Invoice line item.
 - **Description** – a description of the service or goods ordered with the document
 - **Create job when issued** (tick box – unticked by default) - when ticked, a job will be automatically created with the relevant information pulled through.
5. Instructions to Vendor – any special instructions to the vendor, that's not mentioned in the Terms & Conditions
6. The total value will calculate automatically
7. Click "Submit"

If the selected transaction type is linked to a Budget, a message will display on the screen advising on the available budget for the period the Effective Date falls into.

| Item 1 - | | £500.00 | £105.00 | £605.00 | 🗑️ | ⬆️ | | | |
|--|---|-----------|----------------|---------------|-------------------|-----------|---------------|---|----|
| Location* | 8000 - Castle House, Kingston-upon-Thames | Quantity* | 1 | Unit Cost* | £500.00 | VAT Rate* | 21 percentage | ✕ | ⬇️ |
| Transaction Type* | APS - Apportionable Service Charge | Schedule* | S/charge sch A | Expense Code* | DEC - Decorations | | | | |
| <div style="background-color: #fff9c4; padding: 5px; border: 1px solid #ccc;"> ⚠️ Insufficient Budget - Budget available: £80.00 (Budget 1, Period 1). This item: £605.00 , puts you £525.00 over budget </div> | | | | | | | | | |

| Item 1 - | | £50.00 | £10.50 | £60.50 | 🗑️ | ⬆️ | | | |
|---|---|-----------|----------------|---------------|-------------------|-----------|---------------|---|----|
| Location* | 8000 - Castle House, Kingston-upon-Thames | Quantity* | 1 | Unit Cost* | £50.00 | VAT Rate* | 21 percentage | ✕ | ⬇️ |
| Transaction Type* | APS - Apportionable Service Charge | Schedule* | S/charge sch A | Expense Code* | DEC - Decorations | | | | |
| <div style="background-color: #c8e6c9; padding: 5px; border: 1px solid #ccc;"> ✓ Sufficient Budget - Budget available: £80.00 (Budget 1, Period 1). This item: £60.50 , leaves £19.50 remaining in the budget </div> | | | | | | | | | |

You can also generate a PO directly from a job if additional materials or services are required.

2.4.4 Purchase Order Lifecycle

POs in Mojo Works go through several stages:

1. **Draft** - Initial creation and editing
2. **Approval** - Sent for approval
3. **Rejected** - Sent back for changes
4. **Cancelled** – Order cancelled before reaching Issued state
5. **Ready** – Final review, passed manual or automatic approval
6. **Issued** - Formally sent to supplier
7. **Withdrawn** – Order cancelled after issued to Supplier

Steps 2 and 3 only available if you have the Mojo Approvals Add On. The approval process and number of levels will depend on your organization's configuration.

2.4.5 Purchase Order Approval

Purchase order approval is subject to the WSo03 add on. Without this add on, submitted purchase orders will be validated and once valid, passed to the 'Ready' state.

If you are set up as an approver, you will receive notifications when POs require your approval.

To approve a PO:

1. Open the PO from your task list or PO listing
2. Review the details and line items
3. Click "Approve" if satisfactory
4. Click "Reject" to send back, adding comments on required changes

Once a PO passes all approval levels, it will be visible in a 'Ready' state.

2.4.6 Issuing a Purchase Order

A purchase order can only be issued from the Ready state. At this point you have the opportunity to review the document once again before sending it out to the Supplier. Click Preview Tab:

The screenshot shows the 'Purchase Order: PO575' interface in the Mojo system. The top navigation bar includes the Mojo logo and user information 'SIT Jerry\RC001'. The breadcrumb trail is 'WORKS > PURCHASE ORDERS > PURCHASE ORDER'. The main header shows 'Purchase Order: PO575' and a 'Ready' status badge with 'Assignee: Unassigned'. Below the header are tabs for 'Order', 'Preview' (selected), and 'History'. A 'Print' button is visible. The main content area displays the 'Purchase Order' details, including logos for 'tramps', 'bluebox', and 'o6ix'. The 'Invoice Address' section lists 'Trace Solutions Ltd (Sales Demo Database)', 'On Behalf Of: Residential Management Co', 'Trace HQ', '224/232 St. John Street', 'London', and 'EC1V 4QR'. The 'Purchase Order' summary table shows 'Purchase Order No. PO575', 'Issue Date Not Issued', and 'Due Date 24/01/2025'. The 'Delivery Address' section lists 'CraneFields' and '1-10 Court Road'. The 'Supplier Address' section lists 'Waste Away North - Name' and 'Unit 7'.

| Purchase Order | |
|--------------------|------------|
| Purchase Order No. | PO575 |
| Issue Date | Not Issued |
| Due Date | 24/01/2025 |

Scrolling down you can see the full details that will be sent to the supplier:

SS16 4AN

WINSFORD
Cheshire
AA11AA
Great Britain

| Description | Qty | Unit Price | Total Excl Vat | Vat Rate | Vat Amount | Total Inc Vat |
|--|-----|------------|----------------|---------------------|-------------|---------------|
| Please clear external drains at the property | 1 | £80.00 | £80.00 | Standard - UK - 20% | £16.00 | £96.00 |
| | | | | | Total Net | £80.00 |
| | | | | | Total VAT | £16.00 |
| | | | | | Total Gross | £96.00 |

Instructions to Vendor

Access through the side gate.

Terms and Conditions

By accepting this Purchase Order, the Supplier agrees to provide property maintenance services as specified, in accordance with the following terms and conditions: The Supplier shall perform all services in a professional and timely manner, adhering to all applicable UK laws and regulations. Any materials used must meet industry standards and be approved by the Purchaser. The Supplier is responsible for obtaining all necessary permits and licenses. Payment will be made within 30 days of receipt of a valid invoice, subject to satisfactory completion of the services. The Purchaser reserves the right to inspect and approve the work before payment. Any delays or deviations from the agreed schedule must be communicated promptly. The Purchaser may terminate this agreement if the Supplier fails to meet the terms outlined herein.

Trace Solutions Ltd (Sales Demo Database)
Registered Office: Trace HQ, 224/232 St. John Street, London, EC1V 4QR
Company No: 2052844 VAT Registration: GB 454226557 Tel: 0207 825 1000

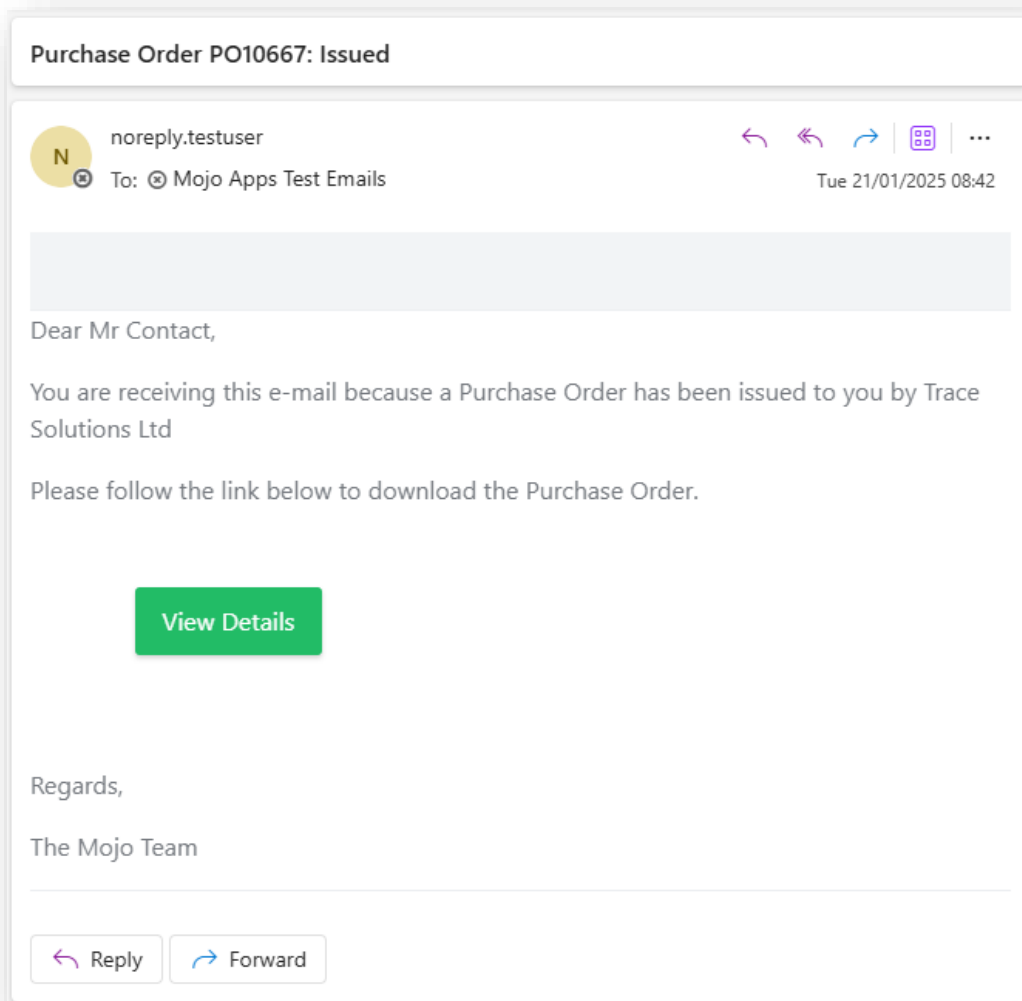
← Purchase Orders

Issue
Cancel
Redraft

To issue a PO:

1. Ensure that all the details are correct
2. Click "Issue" at the bottom of the screen
3. A confirmation dialog will display, asking for confirmation
 - a. If you are not sure that the document is ready to be sent out, click "No" and then "Redraft"
 - b. If you are happy to issue the PO to your Supplier, click "Yes"
4. Once clicked "Yes" the PO will enter the Issued state and an email will be sent to the Supplier with a link to access the PO document.

An Issued PO can be resent to the supplier, simply click on “Resend to Supplier” to trigger a new email to your Supplier.

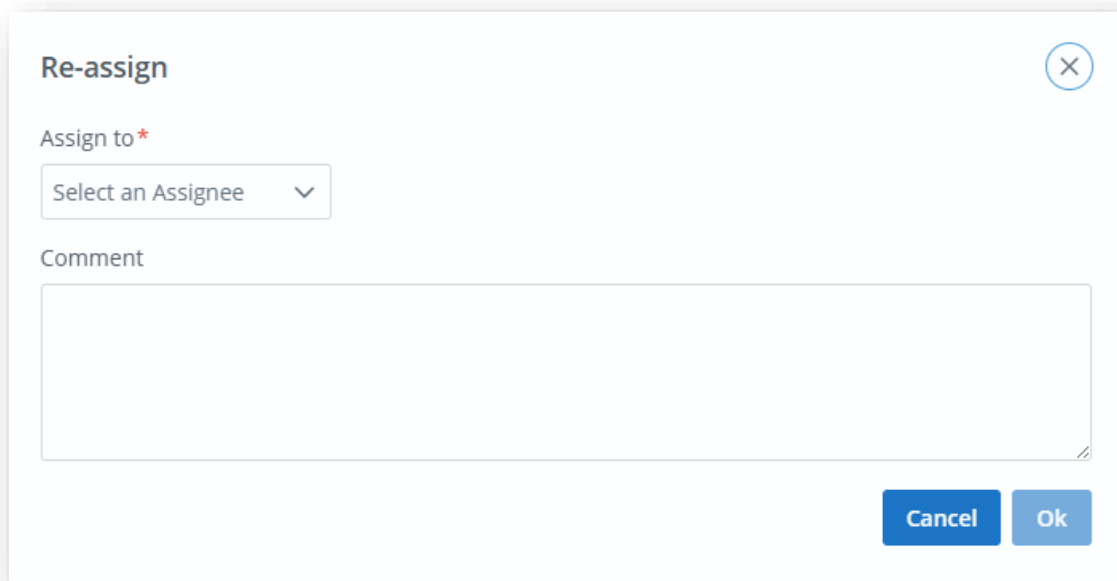


You can withdraw an issued PO by clicking on “Withdraw” which will send a notification email to your Supplier, advising that the order is no longer required.

2.4.7 Assigning a Purchase Order to an Individual

You can assign Individuals to POs and leave comments to them.

To assign a user, simply click on the Assignee button on the top right corner of the PO form and select an Assignee and add any information to the Comment field.

A modal dialog box titled "Re-assign" with a close button (X) in the top right corner. It contains a label "Assign to*" above a dropdown menu with the text "Select an Assignee" and a downward arrow. Below this is a label "Comment" above a large text input area. At the bottom right are two buttons: "Cancel" and "Ok".

Re-assign

Assign to*

Select an Assignee ▼

Comment

Cancel Ok

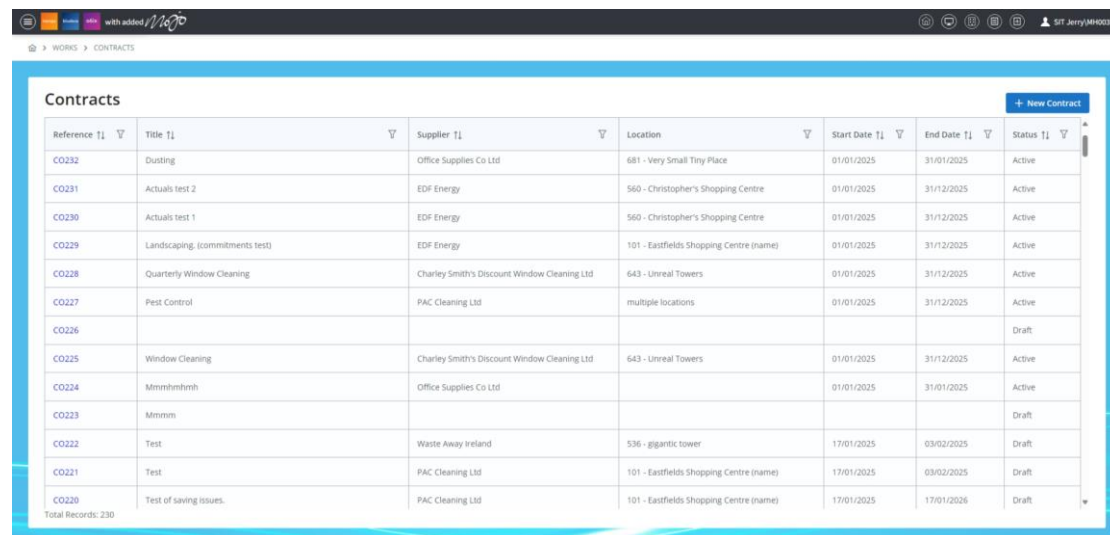
The comment along with the commenter's name will be displayed on the PO screen as a message which can be closed any time.

Please note that the assignment feature in Works is currently not limiting user access, any user with the right permissions will be able to process the PO, regardless of the assignment.

2.5 Contracts

Contracts in Mojo Works allow you to manage agreements with suppliers for ongoing works and services. You can also generate Jobs to track progress of the Contract Services.

2.5.1 Contract List



| Reference | Title | Supplier | Location | Start Date | End Date | Status |
|-----------|---------------------------------|--|---|------------|------------|--------|
| CO232 | Dusting | Office Supplies Co Ltd | 681 - Very Small Tiny Place | 01/01/2025 | 31/01/2025 | Active |
| CO231 | Actuals test 2 | EDF Energy | 560 - Christopher's Shopping Centre | 01/01/2025 | 31/12/2025 | Active |
| CO230 | Actuals test 1 | EDF Energy | 560 - Christopher's Shopping Centre | 01/01/2025 | 31/12/2025 | Active |
| CO229 | Landscaping, (commitments test) | EDF Energy | 101 - Eastfields Shopping Centre (name) | 01/01/2025 | 31/12/2025 | Active |
| CO228 | Quarterly Window Cleaning | Charley Smith's Discount Window Cleaning Ltd | 643 - Unreal Towers | 01/01/2025 | 31/12/2025 | Active |
| CO227 | Pest Control | PAC Cleaning Ltd | multiple locations | 01/01/2025 | 31/12/2025 | Active |
| CO226 | | | | | | Draft |
| CO225 | Window Cleaning | Charley Smith's Discount Window Cleaning Ltd | 643 - Unreal Towers | 01/01/2025 | 31/12/2025 | Active |
| CO224 | Mmmmmmmh | Office Supplies Co Ltd | | 01/01/2025 | 31/01/2025 | Active |
| CO223 | Mmmmm | | | | | Draft |
| CO222 | Test | Waste Away Ireland | 536 - gigantic tower | 17/01/2025 | 03/02/2025 | Draft |
| CO221 | Test | PAC Cleaning Ltd | 101 - Eastfields Shopping Centre (name) | 17/01/2025 | 03/02/2025 | Draft |
| CO220 | Test of saving issues. | PAC Cleaning Ltd | 101 - Eastfields Shopping Centre (name) | 17/01/2025 | 17/01/2026 | Draft |

Total Records: 230

On the Contract lister page you can find the following columns:

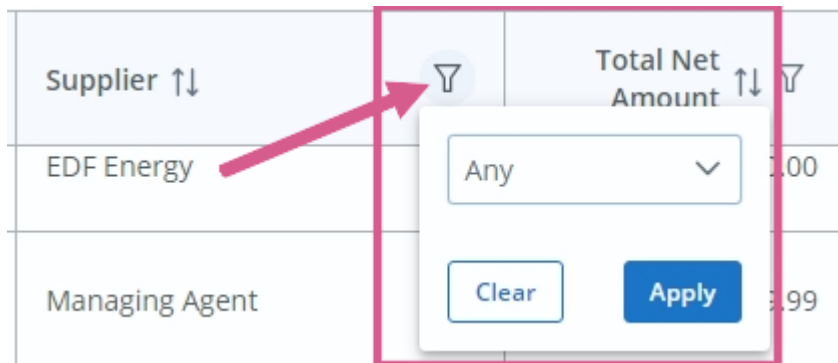
- **Reference** – the unique reference for the contract
- **Title** – the title or summary of the contract
- **Supplier** – the supplier type creditor selected on the contract
- **Location** – the location the contract relates to. If multiple locations been selected 'multiple locations' will be displayed
- **Start Date** – the date when the contract starts
- **End Date** – the date when the contract terminates
- **Status** – the status of the contract

You can sort the lister by most of the columns, by simply clicking on the desired column header. The selected column will have a sorting indicator and highlighted text:

| | | |
|--------------|---------|--|
| Reference ↑↓ | Title ↓ | |
|--------------|---------|--|

Clicking on the column header again will change the sorting order.

You can also filter by each column, using the filter button on the right end of each column header

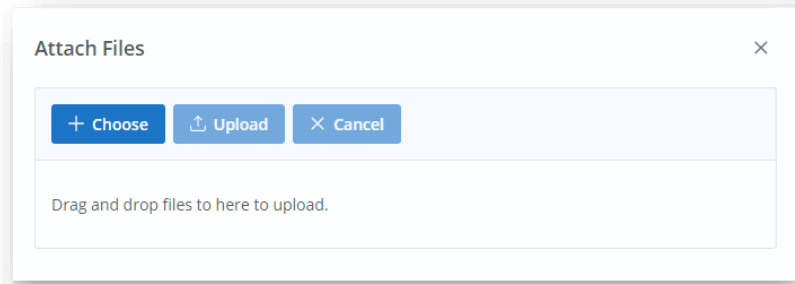


2.5.2 Creating a Contract

To create a new contract:

1. Click "Contracts" on the Works Home Page or in burger menu to access the Lister Page.
2. Click the "New Contract" button in the top right
3. Fill in the contract details:

- **Attach Files** – opens the file upload dialog, where you can upload all the related files in one go



- **Title** – A summary of the contract, to make it easier to identify
- **Client** – allows you to select a client to associate with the contract
- **Supplier** – the supplier type creditor who provides the services detailed in the contract
- **Start Date** – determines when the contract becomes active
- **End Date** – determines when the contract becomes expired

4. Enter Service details:

- **Location** – property/unit related to the service
- **Amount** – the net cost of the service
- **VAT Rate** – the vat rate applicable to the service
- **Transaction Type** and Coding – allows you to select the transaction type and relevant coding, such as Schedule and Expense Code, which will pull through to your Creditor Invoice form.
- **Recurrence** – allows you to create recurring events for the contract service. You can select Daily, Weekly, Monthly, Yearly and Never recurring services. Defaults to Never
- **Due Date** – the date when the contract service or the first occurrence is due
- **Details** – a description of the service requirements
- **Create Job(s)** – when ticked, jobs will created when they are due
 - **Job Lead Time** – determines when the jobs are due, so your vendors will get a job notification email to allow them time to prepare and carry out the works.

5. Click **Create** when all mandatory fields been filled in

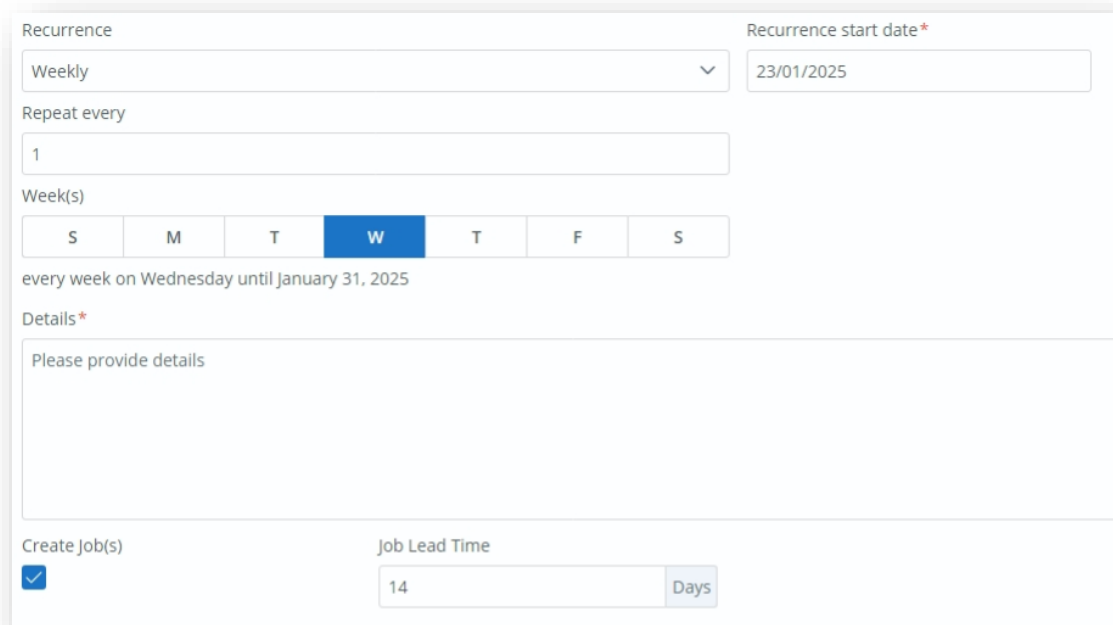
2.5.3 Contract Lifecycle

Contracts in Mojo Works go through several stages:

1. **Draft** - Initial creation and editing
2. **Confirmed** - Contract created but not yet active
3. **Cancelled** – Contract cancelled before the Start date
4. **Active** - Contract is in effect and can generate jobs
5. **Expired** - Contract has ended
6. **Terminated** - Contract ended early

The current status is displayed on the contract details page. Contracts can only be edited when drafted. Contracts can automatically enter the Active and Expired states when they reach their start or end date.

2.5.4 Contract Service Recurrences



The screenshot shows a form for setting up contract service recurrences. It includes a 'Recurrence' dropdown set to 'Weekly', a 'Recurrence start date' field with '23/01/2025', a 'Repeat every' field with '1', and a 'Week(s)' section with a calendar grid where Wednesday is selected. Below the calendar, it says 'every week on Wednesday until January 31, 2025'. There is a 'Details*' section with a text area for 'Please provide details'. At the bottom, there is a 'Create Job(s)' checkbox that is checked, and a 'Job Lead Time' field with '14' and a 'Days' unit selector.

| Recurrence | | Recurrence start date* |
|------------|---|------------------------|
| Weekly | ▼ | 23/01/2025 |

Repeat every

1

Week(s)

| | | | | | | |
|---|---|---|---|---|---|---|
| S | M | T | W | T | F | S |
|---|---|---|---|---|---|---|

every week on Wednesday until January 31, 2025

Details*

Please provide details

Create Job(s) ☒

Job Lead Time

14 Days

Contracts on Mojo Works give you the opportunity to record granular details for your services.

Using the Recurrence field, you can create Services that have multiple events, such as a monthly cleaning visit. This allows you to track commitments throughout the year with more details. The Recurrence field can be set to:

- Never
- Daily
- Weekly
- Monthly
- Yearly

Whilst "Never" is a single event, the other options offer you a chance to capture more details, with the "Repeat every" field, where you can set when these need to reoccur. For example, if your selection is Monthly and enter 2 in the "Repeat every" field, then an occurrence will be logged for every 2 months between the Service Due Date and the Contract End Date. The Weekly option also enables you to select the day(s) of the week you want the event to reoccur. All the created Service occurrences will generate a commitment entry.

Contract Service totals will be automatically calculated in the Service header based on their Occurrence. For example, if a Service is set at NET £100 and it is scheduled for each month for the next year, the totals will show £1,200. These Service totals will add up to a Contract total, displayed on the right side, above the Service headers

2.5.5 [Assigning a Contract to an Individual](#)

You can assign Individuals to Contracts and leave comments to them.

To assign a user, simply click on the Assignee button on the top right corner of the Contract form and select an Assignee and add any information to the Comment field.

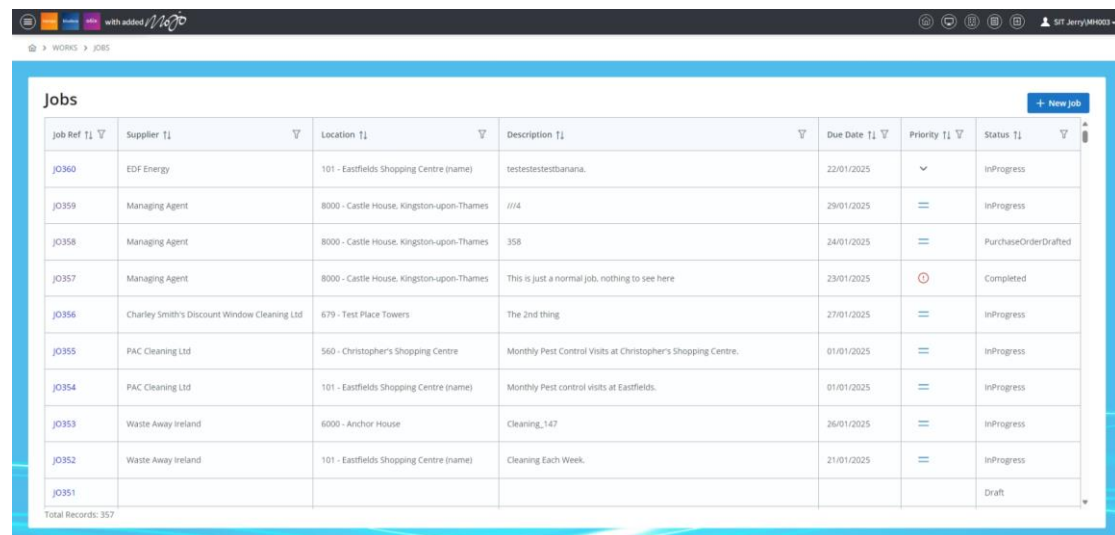
The comment along with the commenter's will be displayed on the Contract screen as a message which can be closed any time.

Please note that the assignment feature in Works is currently not limiting user access, any user with the right permissions will be able to process the Contract, regardless of the assignment.

2.6 Jobs

Jobs represent individual pieces of work to be carried out, either from contracts or raised manually.

2.6.1 Jobs List



| Job Ref T1 | Supplier T1 | Location T1 | Description T1 | Due Date T1 | Priority T1 | Status T1 |
|------------|--|---|---|-------------|-------------|----------------------|
| JO360 | EDF Energy | 101 - Eastfields Shopping Centre (name) | testtestestbanana. | 22/01/2025 | ▼ | InProgress |
| JO359 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | //4 | 29/01/2025 | == | InProgress |
| JO358 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | 358 | 24/01/2025 | == | PurchaseOrderDrafted |
| JO357 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | This is just a normal job, nothing to see here | 23/01/2025 | ⊙ | Completed |
| JO356 | Charley Smith's Discount Window Cleaning Ltd | 679 - Test Place Towers | The 2nd thing | 27/01/2025 | == | InProgress |
| JO355 | PAC Cleaning Ltd | 560 - Christopher's Shopping Centre | Monthly Pest Control Visits at Christopher's Shopping Centre. | 01/01/2025 | == | InProgress |
| JO354 | PAC Cleaning Ltd | 101 - Eastfields Shopping Centre (name) | Monthly Pest control visits at Eastfields. | 01/01/2025 | == | InProgress |
| JO353 | Waste Away Ireland | 6000 - Anchor House | Cleaning_147 | 26/01/2025 | == | InProgress |
| JO352 | Waste Away Ireland | 101 - Eastfields Shopping Centre (name) | Cleaning Each Week. | 21/01/2025 | == | InProgress |
| JO351 | | | | | | Draft |

Total Records: 357

On the Contract lister page you can find the following columns:

- Job Ref – the unique reference of the Job
- Supplier – the supplier type creditor instructed on the job
- Location – the property/unit where the job takes place
- Description – the details of the job
- Priority – indicating the urgency of the job
- Status – the status of the job

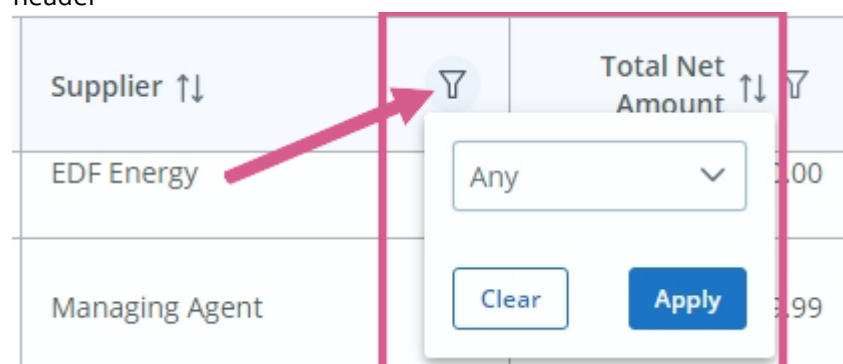
You can sort the lister by most of the columns, by simply clicking on the desired column header. The selected column will have a sorting indicator and highlighted text:



| Reference ↑↓ | Title ↓ |
|--------------|---------|
|--------------|---------|

Clicking on the column header again will change the sorting order.

You can also filter by each column, using the filter button on the right end of each column header



| Supplier ↑↓ | Total Net Amount ↑↓ |
|----------------|---------------------|
| EDF Energy | 1.00 |
| Managing Agent | 3.99 |

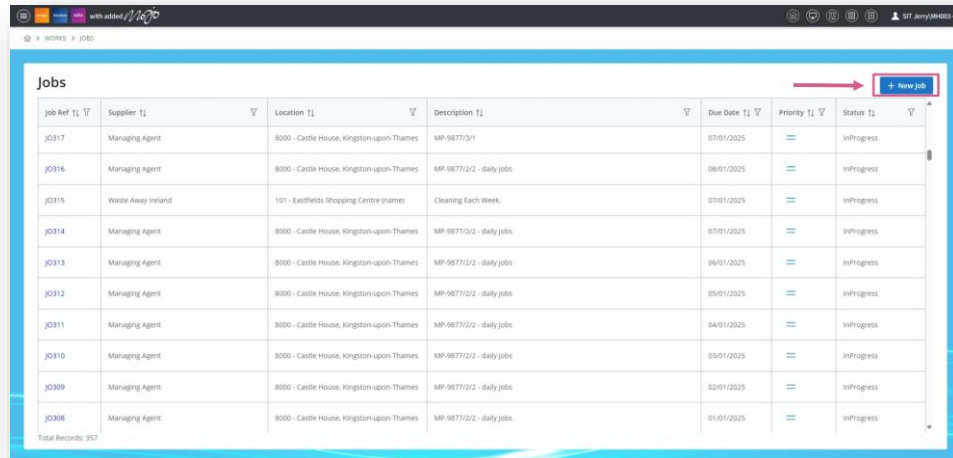
Any ▼

Clear Apply

2.6.2 Creating a Job

To create a new job:

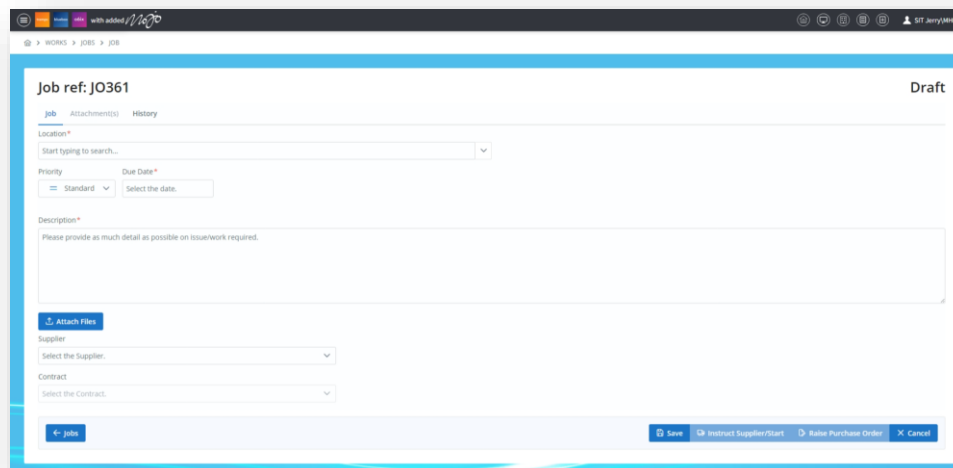
1. Click "Jobs" on the Works Home Page or in burger menu to access the Lister Page.
2. Click "New Job" in the top right



| Job Ref T1 | Supplier T1 | Location T1 | Description T1 | Due Date T1 | Priority T1 | Status T1 |
|------------|--------------------|---|--------------------------|-------------|-------------|------------|
| J0317 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/3/1 | 07/01/2025 | == | InProgress |
| J0316 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 08/01/2025 | == | InProgress |
| J0315 | Waste Away Ireland | 101 - Eastfields Shopping Centre (name) | Cleaning Each Week. | 07/01/2025 | == | InProgress |
| J0314 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 07/01/2025 | == | InProgress |
| J0313 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 06/01/2025 | == | InProgress |
| J0312 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 05/01/2025 | == | InProgress |
| J0311 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 04/01/2025 | == | InProgress |
| J0310 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 03/01/2025 | == | InProgress |
| J0309 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 02/01/2025 | == | InProgress |
| J0308 | Managing Agent | 8000 - Castle House, Kingston-upon-Thames | MP-9877/2/2 - daily jobs | 01/01/2025 | == | InProgress |

Total Records: 357

3. Fill in the job details



Job ref: J0361 Draft

Location*

Start typing to search...

Priority Standard Due Date* Select the date.

Description*

Please provide as much detail as possible on issue/work required.

Attach Files

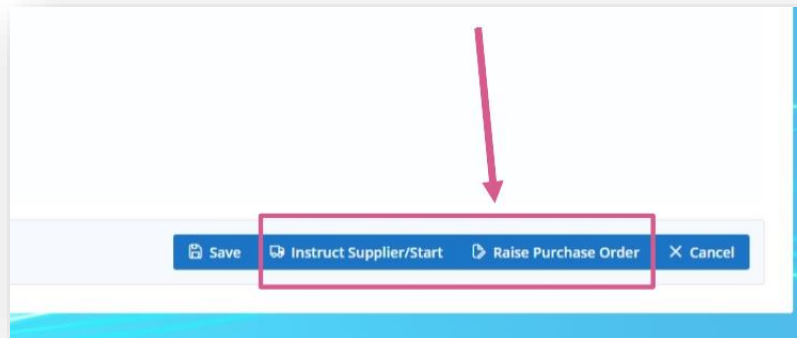
Supplier Select the Supplier.

Contract Select the Contract.

[← Jobs](#) [Save](#) [Instruct Supplier/Start](#) [Raise Purchase Order](#) [Cancel](#)

- **Location**
- **Priority**
- **Due Date**
- **Description**
- **Attachment(s)**

- **Supplier**
 - **Contract**
4. Once the mandatory fields are filled in, the "Instruct Supplier/Start" button becomes active. If a Supplier is selected, the "Raise Purchase Order" button becomes active as well



5. Click "Instruct Supplier/Start" to create the Job or click "Raise Purchase Order" to create a new purchase order related to the Job. Once the purchase order is issued, the job changes state to "In Progress"

2.6.3 Job Lifecycle

Jobs progress through the following statuses:

1. **Draft** - Initial creation and editing
2. **Purchase Order Drafted** – a purchase order been created and the job will stay in this state until the purchase order reaches the issued state
3. **In Progress** - Work has been assigned and started
4. **Halt** - Work temporarily paused
5. **Resume** – Work can continue
6. **Redraft** – Job needs amending
7. **Completed** - Work finished, awaiting confirmation
8. **More Work Required** – The supplier needs to revisit for more work

Jobs may also be cancelled at any point if no longer required.

Suppliers are notified of updates to the job from instruction through to completion. They can access full details of the job by a link they are sent via email.

2.7 Invoice Processing

Mojo Works allows you to populate a Creditor Invoice form by calling up a Purchase Order or a Contract, or for suppliers to do the same when submitting an invoice via Mojo for Suppliers.

2.7.1 Invoice Posting

Invoices can be added to Mojo in two ways:

1. **Manual entry** - Input invoice details directly via a creditor invoice.

The screenshot shows the 'Creditor Invoice' form in the Mojo Works application. The form is titled 'Creditor Invoice' and has a 'Document' section. It includes the following fields and controls:

- Office**: A text input field with a placeholder 'Search Office Code or Description...'.
- URN**: A text input field with an 'Auto-Generate' button.
- Log Status**: A dropdown menu.
- Image for Invoice**: A dropdown menu.
- Invoice Date**: A text input field with a red asterisk indicating it is required.
- Purchase Order / Contract**: A text input field with a placeholder 'Start typing to search...' and a dropdown arrow. This field is highlighted with a red box.
- Our Order Reference**: A text input field.

2. **Supplier upload** - Suppliers upload invoice via Mojo for Suppliers.

The screenshot shows a mobile application interface for 'Invoice Upload'. At the top is a dark header with the title 'Invoice Upload'. Below it is a section titled 'Document Details' with a collapse arrow. This section contains several form fields: 'Account for:' with a dropdown menu showing 'Select...'; 'Purchase Order / Contract:' with a dropdown menu showing 'Select...' (this field is highlighted with a red rectangular box); 'Document type:' with a dropdown menu showing 'Select...'; 'Document date:' with a text input field containing '23/01/2025'; and 'Document reference:' with a text input field containing 'The Invoice / Credit No.'.

To manually add an invoice:

1. Create a new Creditor Invoice form in the usual way.
2. Add the invoice date.
3. Select your Purchase Order or Contract from the new Purchase Order/Contract search field.
 - If you selected a Contract, a dialog would display to enter the From and To dates
4. Add the invoice details as normal.

When a Contract is selected, the From and To Date fields on document level will determine which Commitment entries we want to invoice against. The From will only pick up Services that have any events in this period.

When a supplier uploads an invoice, providing they will be able to call up any purchase orders and contracts relevant to them, which will create a fully populated Creditor Invoice in a Pending State for you to review.

Creditor Invoice ref: 112729

W Workgroup...

A Assignee ...

1

pending

| | |
|-------------------------------|---|
| Purchase Order / Contract | 0000041541 - EDF Energy - Tower Gate - 7000 - 2 Lavender Hill |
| Our Order Reference | |
| Supplier's Own Account Number | Enter the supplier's own a/c reference here |
| Creditor | * S3 - EDF Energy - Tower Gate |
| Document Type | * PIN - Purchase Invoice |
| Property | 7000 - 2 Lavender Hill |
| Authorising Manager | Search or select... |
| Invoice Reference | * 1131 |
| Payment Due Date | 22/02/2025 |
| From Date | |
| To Date | |
| Net Amount | 500.00 GBP |
| VAT Rate | * STD - Standard - UK - 20% |
| VAT Amount | * 100.00 GBP |
| Gross Amount | 600.00 GBP |
| Narrative | Services |

2.7.2 Invoice Approval

Approval of invoice forms is subject to the WSo03 add on. Without this, creditor invoice forms that are submitted and pass validation will be loaded directly into the system as approved payables, ready for payment processing.

If your organisation has the WSo03 add-on and approval is set up for your creditor invoice form, then the defined approval process will be executed.

Fully approved invoices will be sent to the system for payment processing.

3 Administrator Guide

3.1 Supplier Management

Mojo Works uses your own supplier records, so you do not need to separately add suppliers on Mojo. To ensure Suppliers are instructed by email, make sure their email address is added to their Supplier Creditor Record.

3.2 Mojo Groups

Mojo Groups are based on your Security Groups, and you can add as many as you like to a group. Just got to:

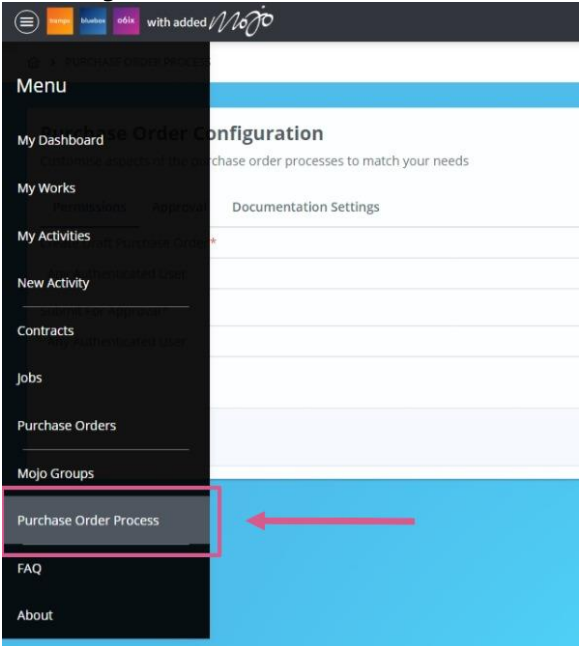
Menu > Mojo Groups

Where you can add/remove/amend any groups you need.

3.3 Purchase Order Configuration

3.3.1 Permissions

You can set permissions to purchase order creation and submission if you navigate to Hamburger Menu > Purchase Order Process > Permissions



The two fields will allow you to limit functionality based on Mojo Groups

3.3.2 Approval

If you have Mojo Approvals, you can set as many Approval Rules as you like to manage Purchase Order Approval.

Purchase Order Configuration
Customise aspects of the purchase order processes to match your needs

Permissions Approval Documentation Settings

Rule 1 - Over £10k

Name*
Over £10k

Condition*
Total Net Amount X

This rule will match if the Total Net Amount of the Purchase Order matches the condition specified below

Operator*
Greater Than or Equal X

Currency*
Pound Sterling

Amount*
£10,000.00

If the above condition is true then*

Automatically Approve Sequential Group Approval

Select Groups

Select and order the groups you would like to approve when this rule is used.
Will require approval by a member of the 'Stage 1 Approval' group.
Will then require approval by a member of the 'Stage 2 Approval' group.
Will then require approval by a member of the 'Stage 3 Approval' group.

Delete Rule Add Rule Save

For example:

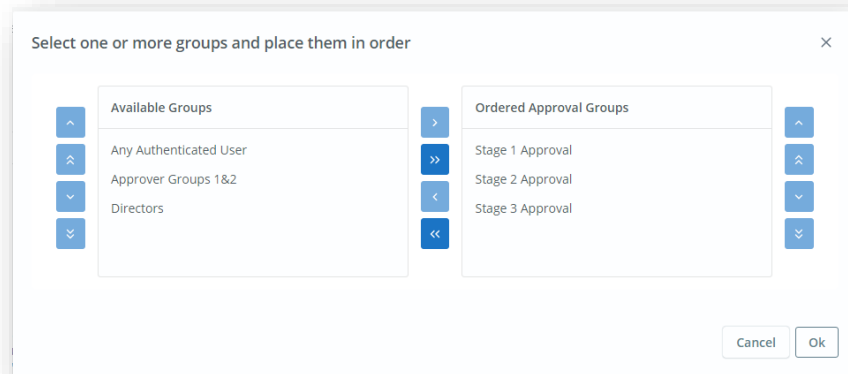
RULE 1: If under £500, approve automatically.

RULE 2: For anything else, go through two levels of approval.

To set up these rules:

1. Go to Menu > Purchase Order Process, and select the 'Approval' tab.
2. Create new approval rules, filling out:
 1. **The Approval rule name** - this will appear at the top of the Purchase Order During Approval
 2. **The Condition** – is it approval based on an amount?
 3. **The operator** – this is how the rule behaves, for example 'Greater Than' or 'Less Than or Equal' the amount you choose.
 4. **Amount**
 5. **Automatic or Sequential Approval** – Automatic approval will just go through; Sequential Approval will open a dialog to select the relevant groups and the order in which the approval travels.

6. If Sequential Approval selected, click "Select Groups" to open the group selection window

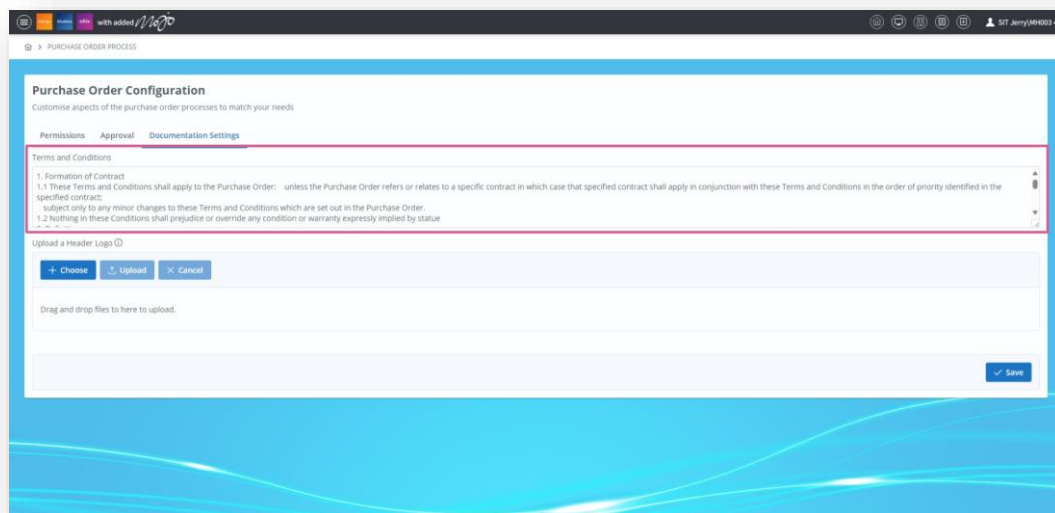


7. When you created all the rules, click "Save"

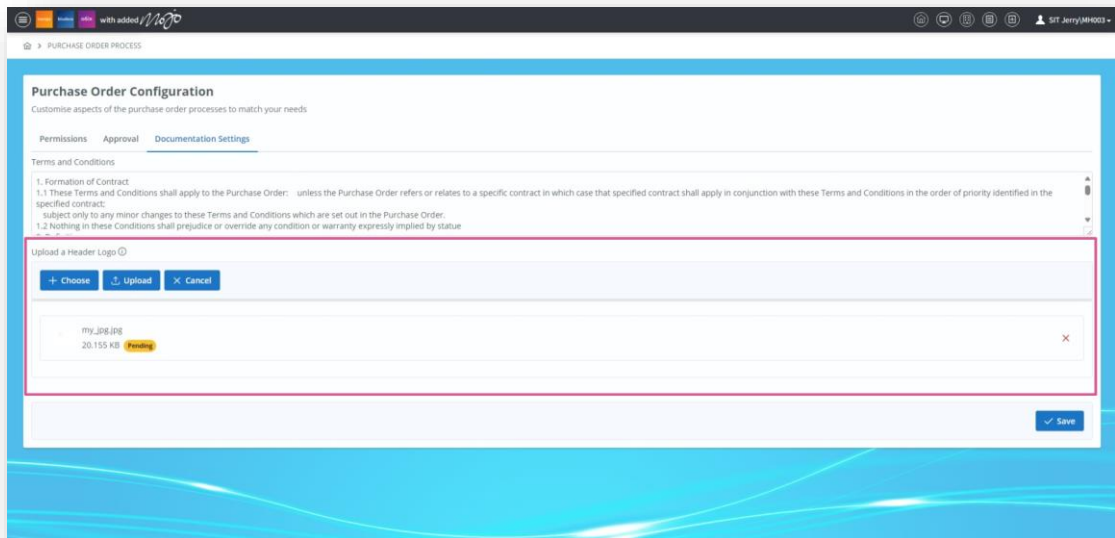
If there are no Approval Rules set, Mojo Works defaults to Automatic Approval.

3.3.3 Documentation Settings

The documentation settings tab will enable you to enrich your purchase order documents. You can add your Terms and Conditions, which will be added to the purchase order document every single time you create one. Simply enter your T&Cs in the input field and click "Save"



You can also upload a Header Logo for your purchase order, which will be added to the document as well.



To upload your logo:

1. Click "Choose" to select your image file
2. Select the file in the pop-up window and click "Open" – only image files are allowed (.jpg, .png, .jpeg, .webp, .svg)
3. Click "Upload" to upload the file or Cancel to discard the changes

3.4 Email templates

The email templates used in Mojo Works can be found along the other email templates. Navigate to the Admin Dashboard, select the Identity Server tile and then the Email Templates.

If you wish to make any changes to the default templates, you can do that, using HTML in the editor.

4 Glossary

| | |
|----------------------------|--|
| Contract | An agreement with a supplier for ongoing works or services |
| Job | An individual piece of work to be carried out |
| Purchase Order (PO) | A formal instruction to a supplier to provide goods or services |
| Invoice | A bill from a supplier for goods or services provided |
| Commitment | The financial value allocated to a job or purchase order |
| Approval Workflow | The process and stages for reviewing and authorizing purchase orders or invoices |