tracesolutions

Mojo Works
Guide for Users and Administrators

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Table of Contents

1 WELCOME TO MOJO WORKS 3

1.1 WHAT IS MOJO WORKS? 3

2 USER GUIDE 4

2.1 GETTING STARTED 4

2.2 HOME PAGE 4

2.3 NAVIGATION 5

2.4 PURCHASE ORDERS 6

2.4.1 *Purchase Order List* 6
2.4.2 *A Quick Tour of a Purchase Order* 8
2.4.3 *Creating a Purchase Order* 13
2.4.4 *Purchase Order Lifecycle* 14
2.4.5 *Purchase Order Approval* 14
2.4.6 *Issuing a Purchase Order* 15
2.4.7 *Assigning a Purchase Order to an Individual* 17

2.5 CONTRACTS 19

2.5.1 *Contract List* 19
2.5.2 *Creating a Contract* 20
2.5.3 *Contract Lifecycle* 22
2.5.4 *Contract Service Recurrences* 22
2.5.5 *Assigning a Contract to an Individual* 23

2.6 JOBS 24

2.6.1 *Jobs List* 24
2.6.2 *Creating a Job* 25
2.6.3 *Job Lifecycle* 26

2.7 INVOICE PROCESSING 27

2.7.1 *Invoice Posting* 27
2.7.2 *Invoice Approval* 29

3 ADMINISTRATOR GUIDE 30

3.1 SUPPLIER MANAGEMENT 30

3.2 MOJO GROUPS 30

3.3 PURCHASE ORDER CONFIGURATION 30

3.3.1 *Permissions* 30
3.3.2 *Approval* 30
3.3.3 *Documentation Settings* 32

3.4 EMAIL TEMPLATES 33

4 GLOSSARY 34

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

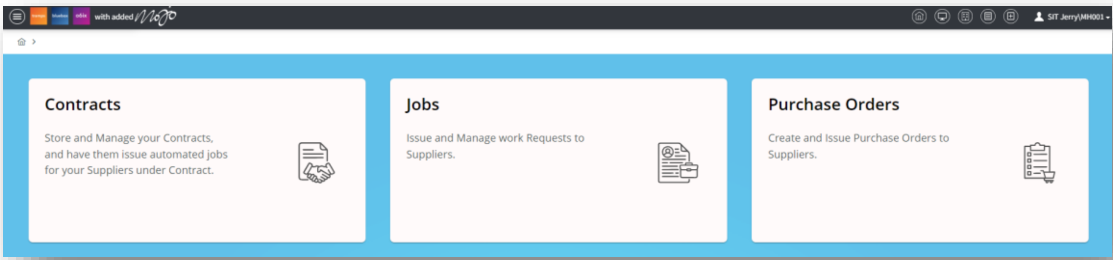
Alternatively click the Works icon on the system bar:

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

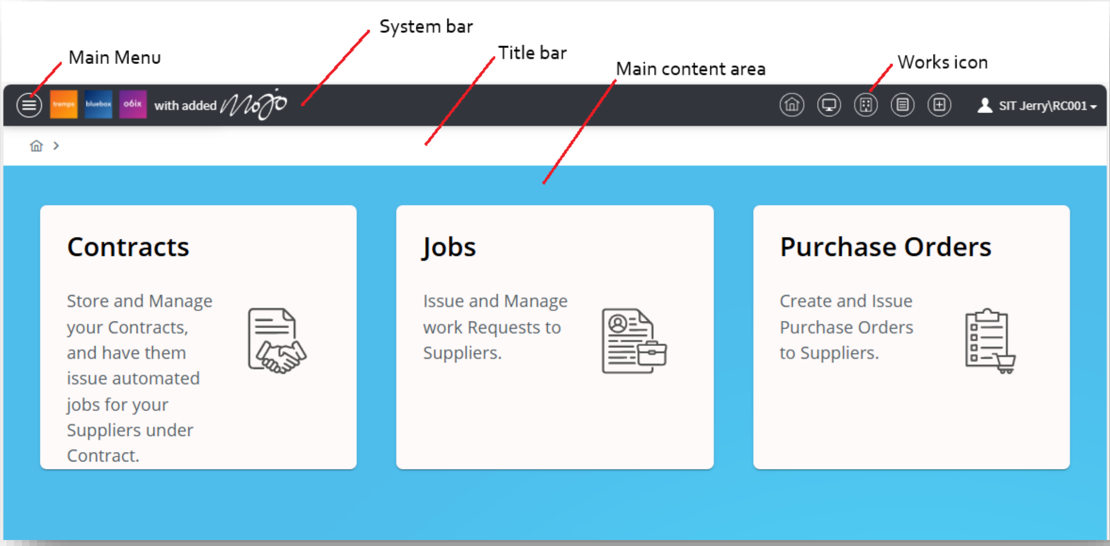
The Home Page of Mojo Works gives you quick access to all the main areas: Contracts, Jobs and Purchase Orders, without having to open the burger menu:



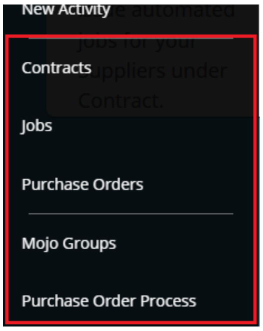
Simply click on the Contracts, Jobs or Purchase Orders tile to access that area of the system.

2.3 Navigation

The main Mojo Works interface consists of several key areas:



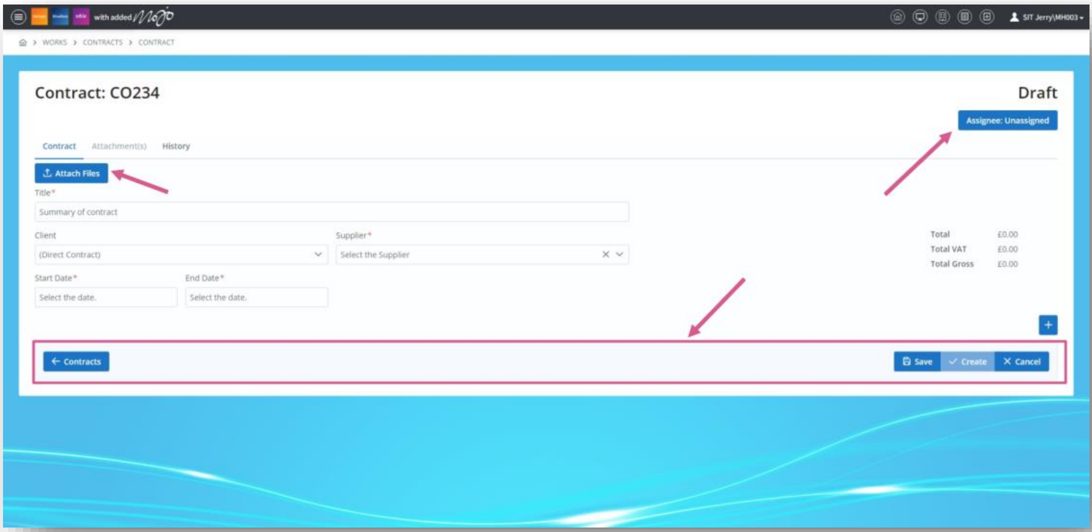
- **Main Menu** – within Mojo Works, the main menu displays has additional options that are specific to Works:



- **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:



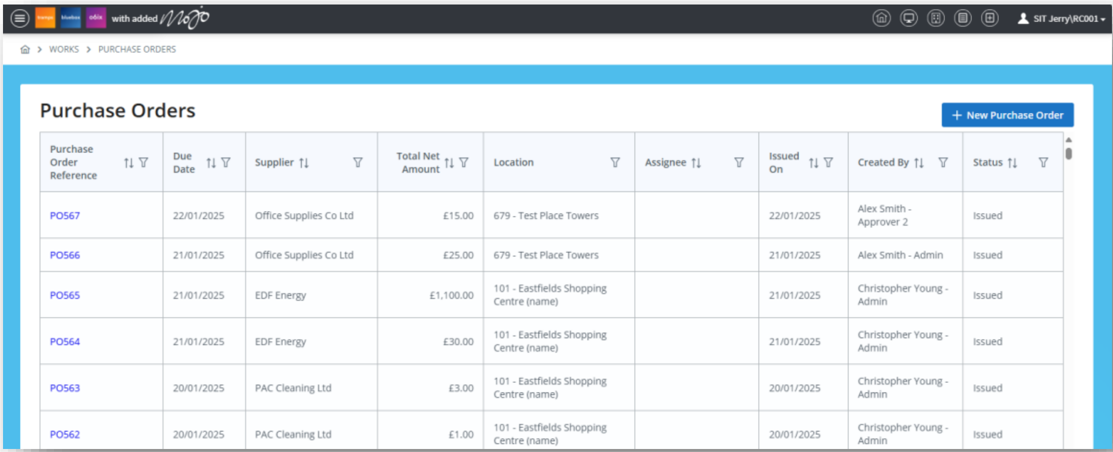
So, to navigate around Mojo Works, you can:

- 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



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

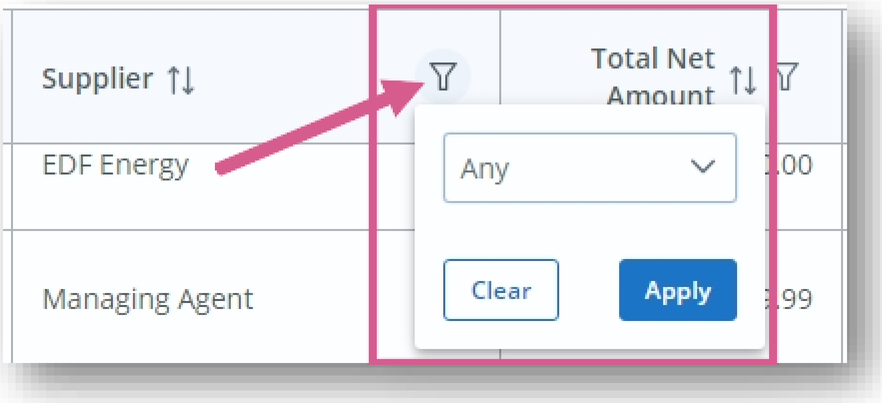
- **Purchase Order Reference** – the unique reference for the purchase order
- **Due Date** – due date set on the purchase order screen
- **Supplier** – the name of the supplier type creditor selected on the purchase order

- **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:

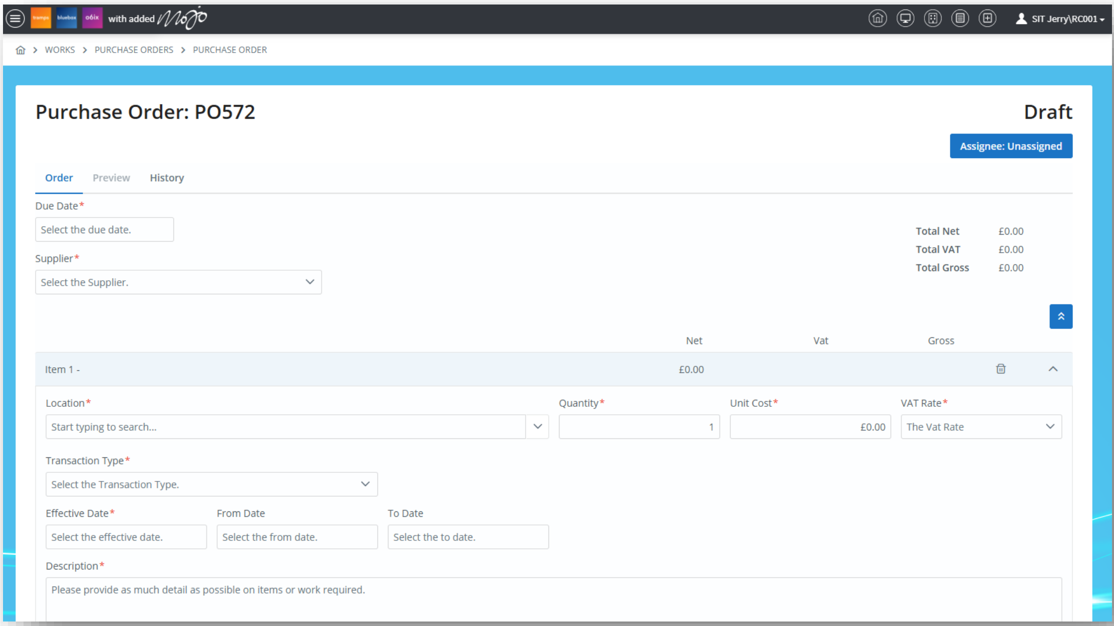
Clicking on the column header again will change the sorting order.

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

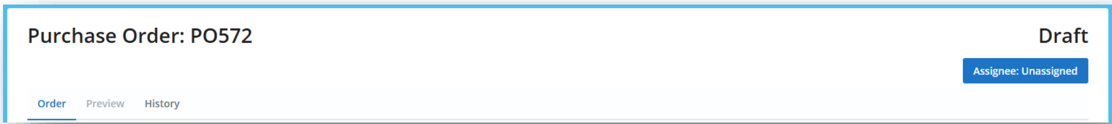


2.4.2 A Quick Tour of a Purchase Order

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:

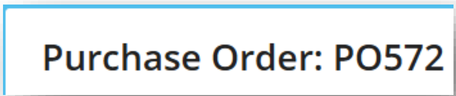


The Header section:

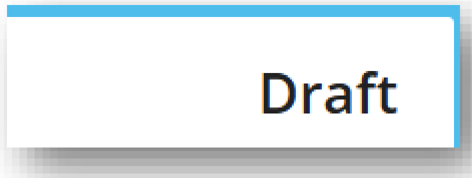


The header section is common throughout Contracts, Jobs and Purchase Orders.

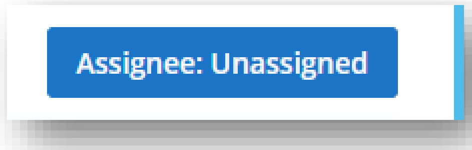
- The top left shows the assigned **(PO / Contract or Job) Reference**. References are assigned automatically.



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

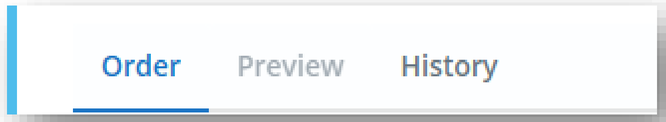


- Below the state, is the **Assignee button**. This both displays the current assignee and by clicking it allows you to assign the record to any other user who is allowed to perform the next action.



- 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**:

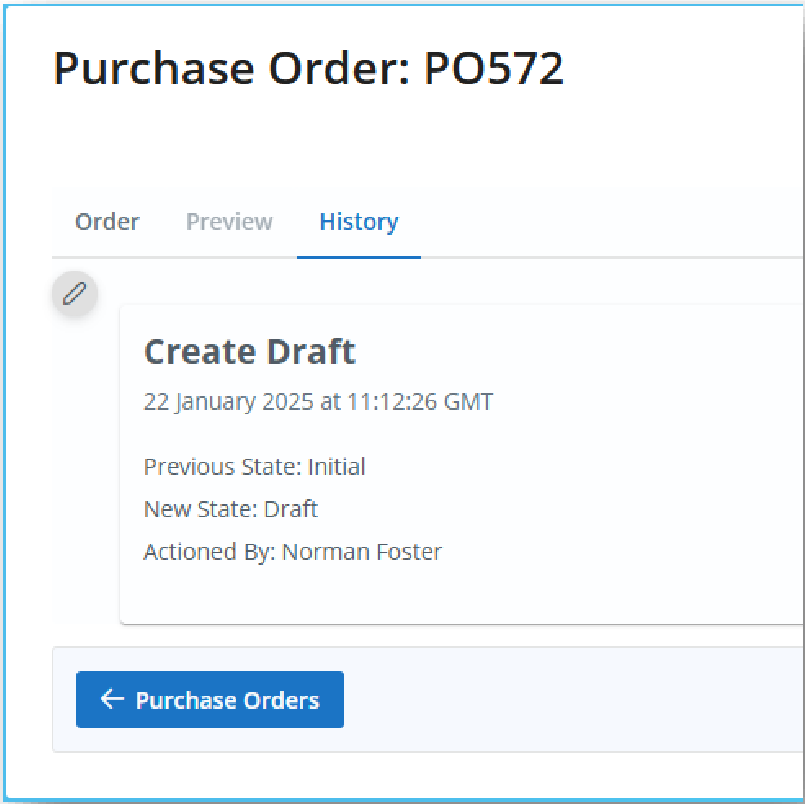
:



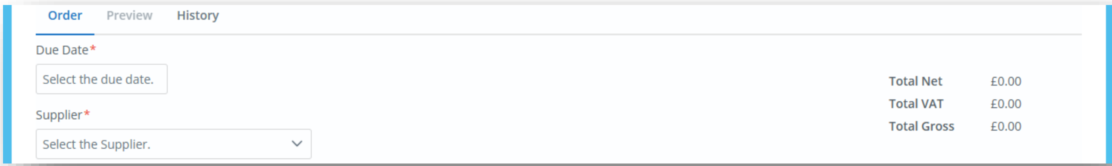
Order is the working page for entering your Purchase order information (selected by default).

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:

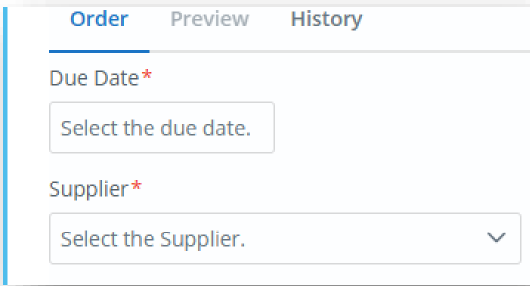


The Document Section:

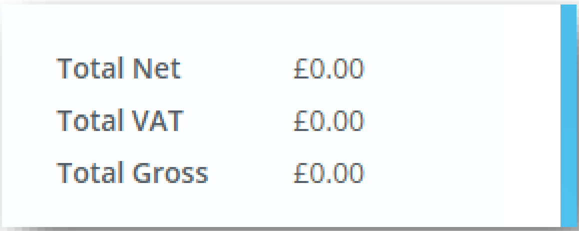


The document section contains:

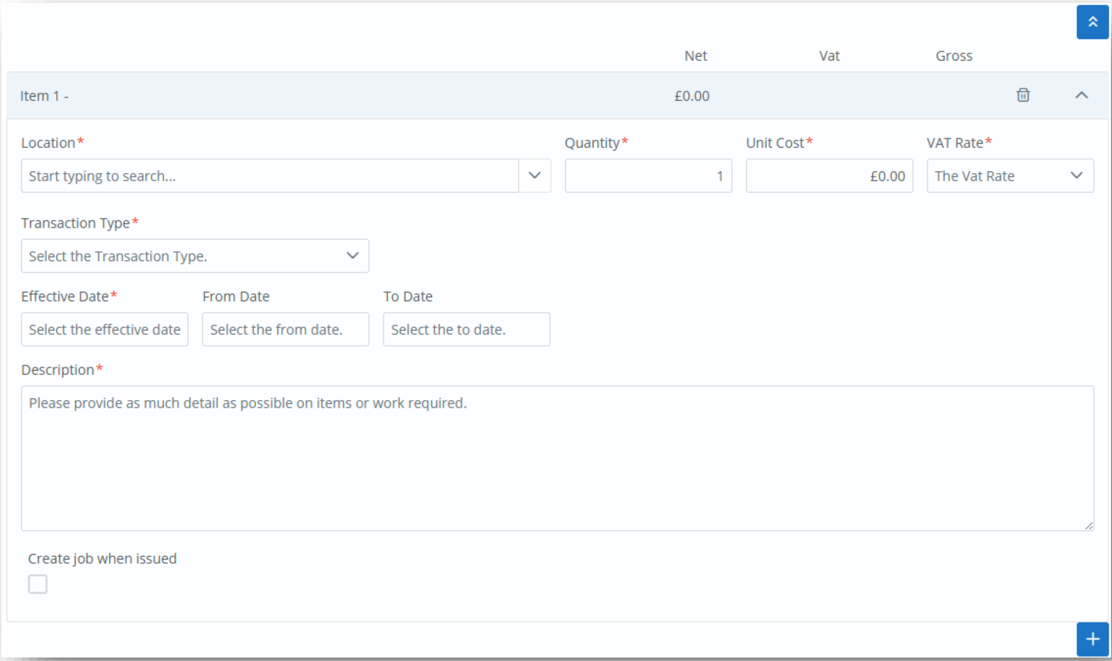
- The **Due Date** that the order is required and **Supplier** (i.e. Supplier creditor) that is being instructed:



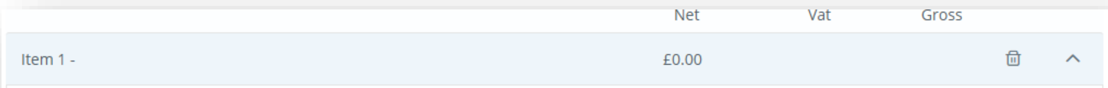
- The running **Totals** (Net, VAT and Gross) of the items entered in the order:



The Line Items Section:



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



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

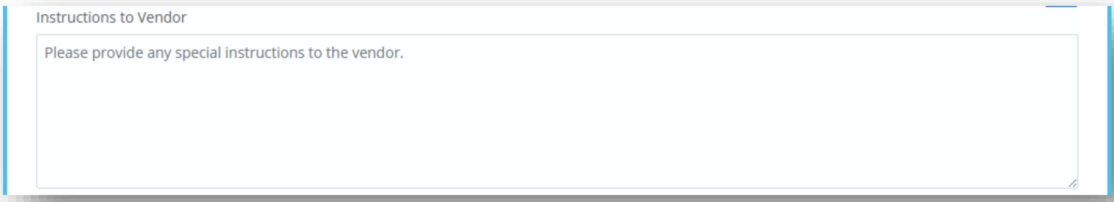
 Hiding / showing the details of the item.

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.

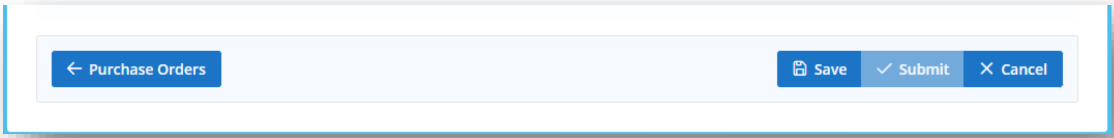
The fields within the item detail section are described in the **Creating a Purchase Order** section.

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.

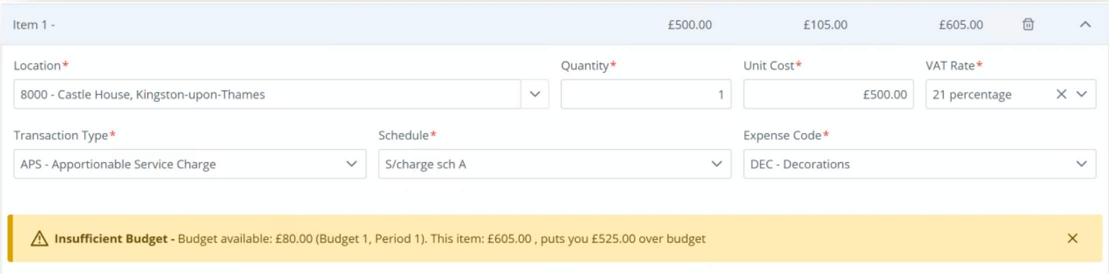
	Returns the user to the purchase order list.
	Saves changes that have been made. This will be greyed out / disabled if no changes have been mad.
	Submits the form for validation / approval. Will be greyed out / disabled if the mandatory information has not been provided.
	Displays a Confirmation box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

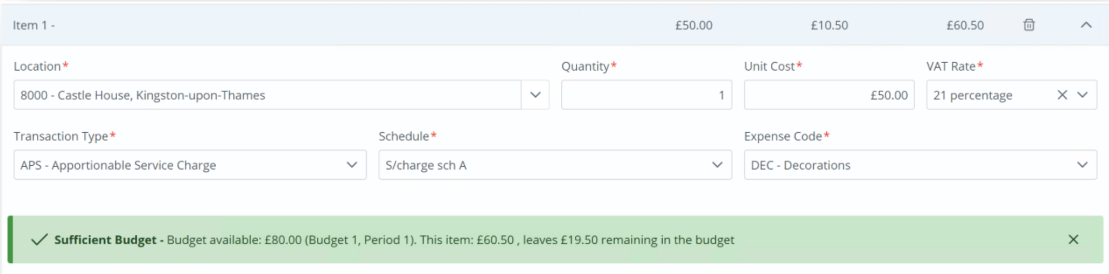
2.4.3 Creating a Purchase Order

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.





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 WS003 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.

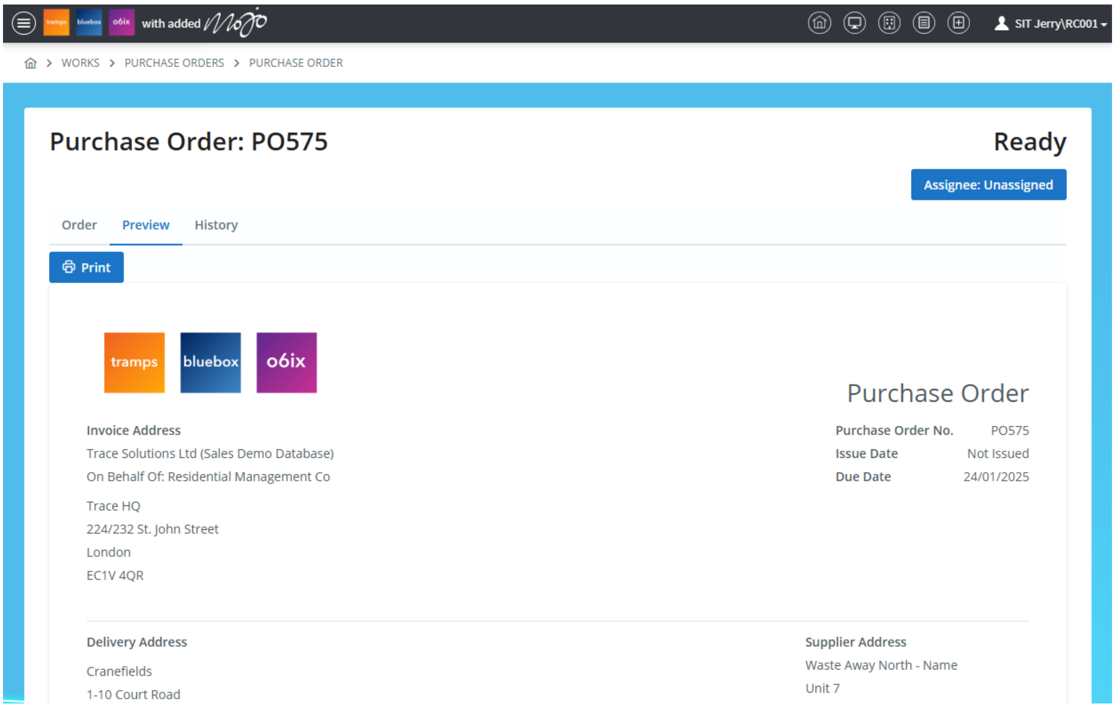
To approve a PO:

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

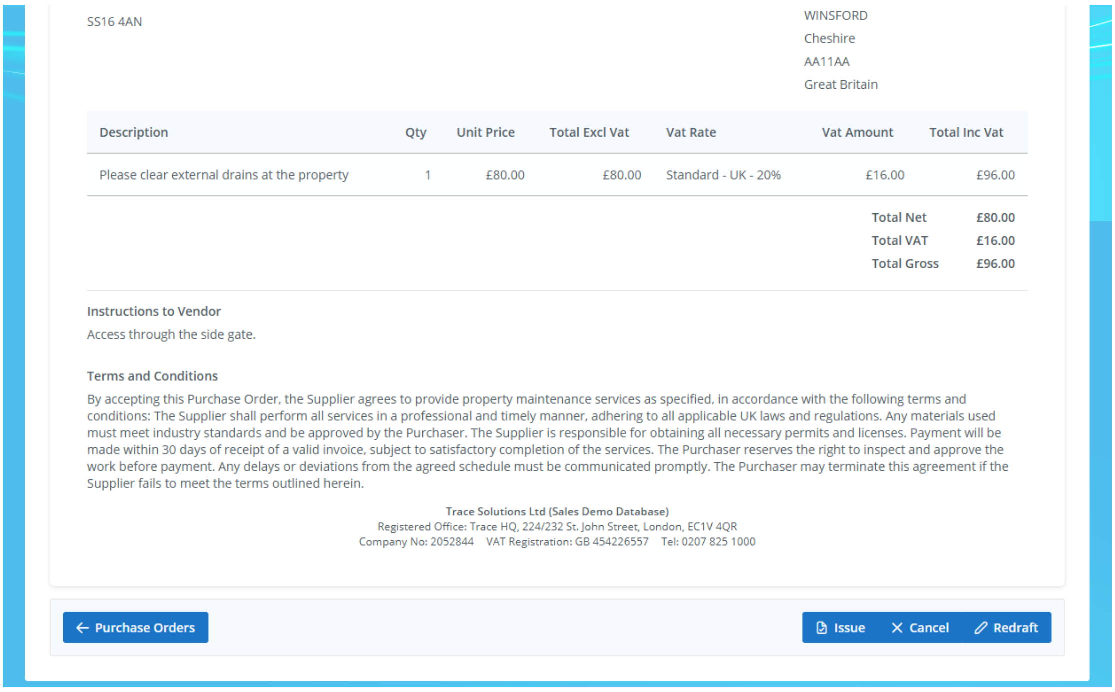
Once a PO passes all approval levels, it will be visible in a 'Ready' state.

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:



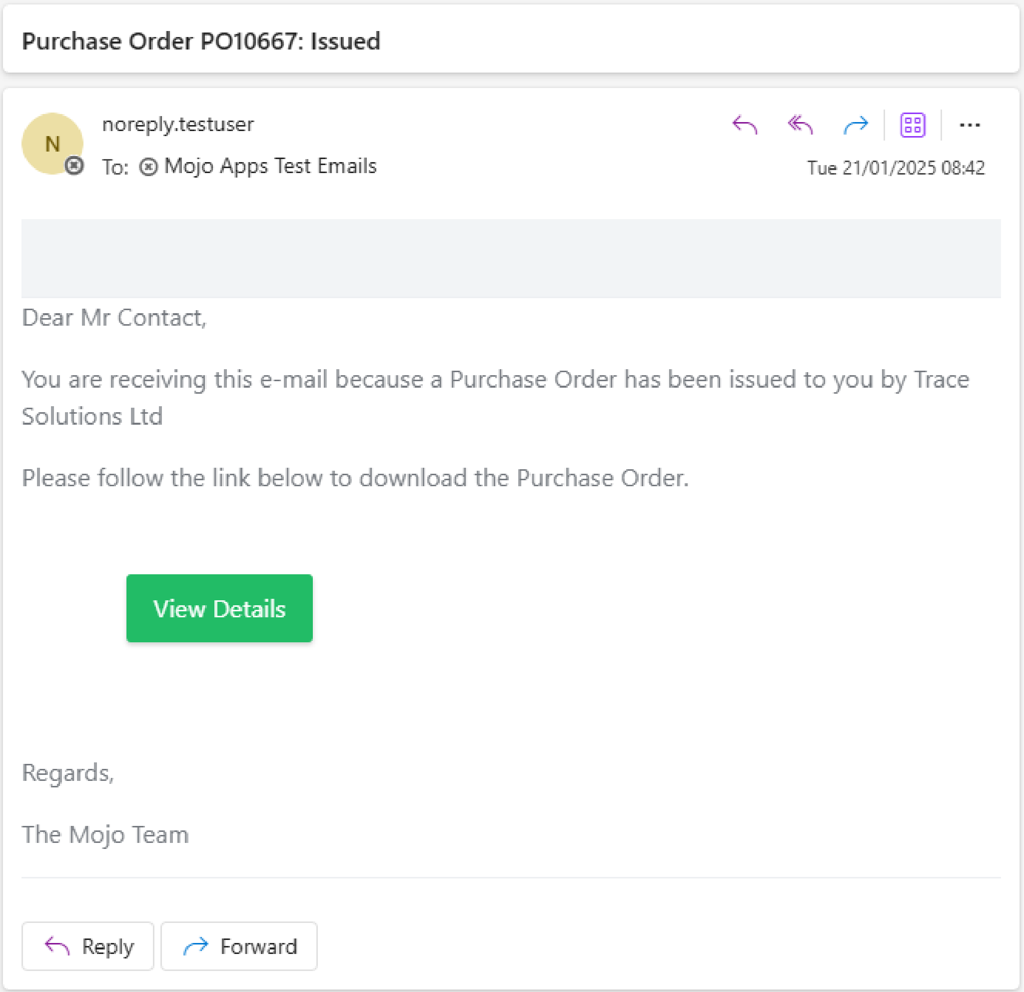
Scrolling down you can see the full details that will be sent to the supplier:



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.

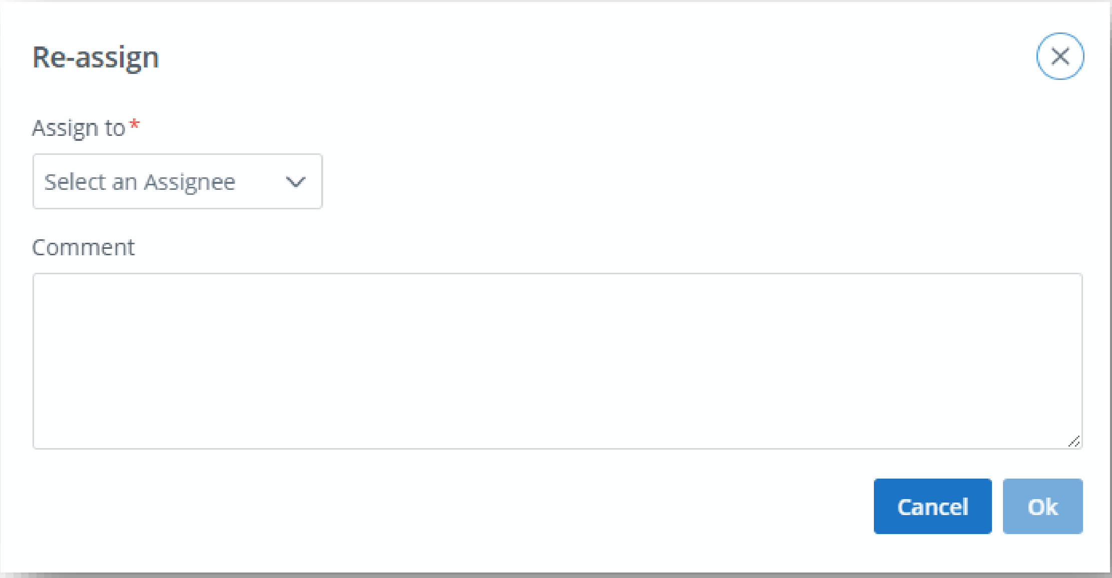


You can withdraw an issued PO by clicking on "Withdraw" which will send a notification email to your Supplier, advising that the order is no longer required.

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.



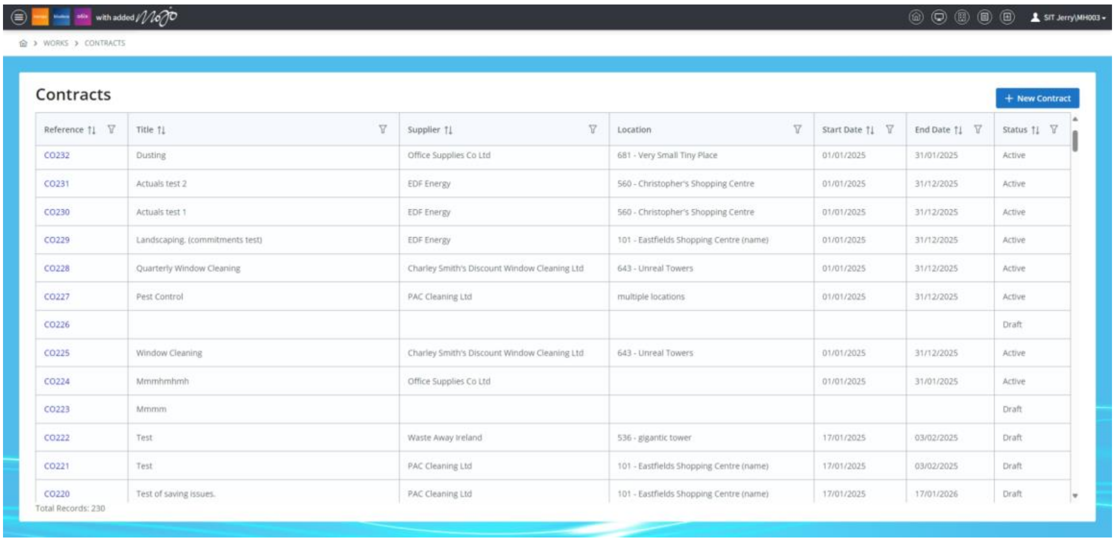
The comment along with the commenter's name will be displayed on the PO screen as a message which can be closed any time.

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

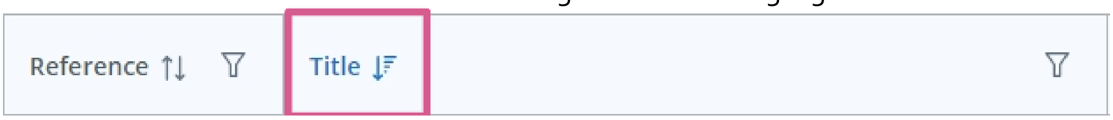


Reference	Title	Supplier	Location	Start Date	End Date	Status
CO232	Dusting	Office Supplies Co Ltd	681 - Very Small Tiny Place	01/01/2025	31/01/2025	Active
CO231	Actuals test 2	EDF Energy	560 - Christopher's Shopping Centre	01/01/2025	31/12/2025	Active
CO230	Actuals test 1	EDF Energy	560 - Christopher's 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	Mmmhmhmh	Office Supplies Co Ltd		01/01/2025	31/01/2025	Active
CO223	Mmmm					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

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

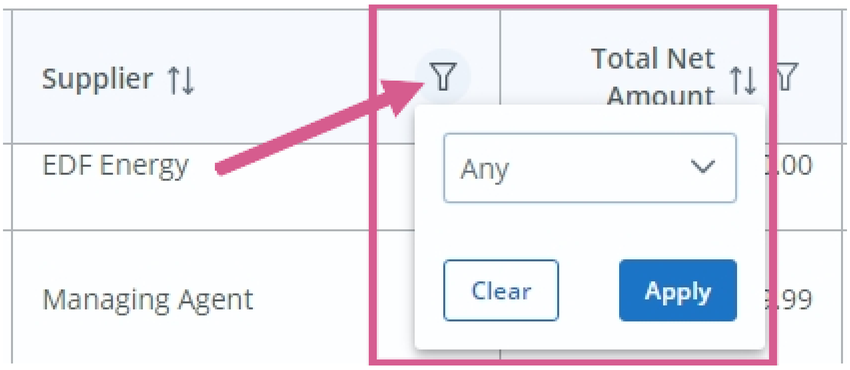
- **Reference** – the unique reference for the contract
- **Title** – the title or summary of the contract
- **Supplier** – the supplier type creditor selected on the contract
- **Location** – the location the contract relates to. If multiple locations been selected 'multiple locations' will be displayed
- **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:

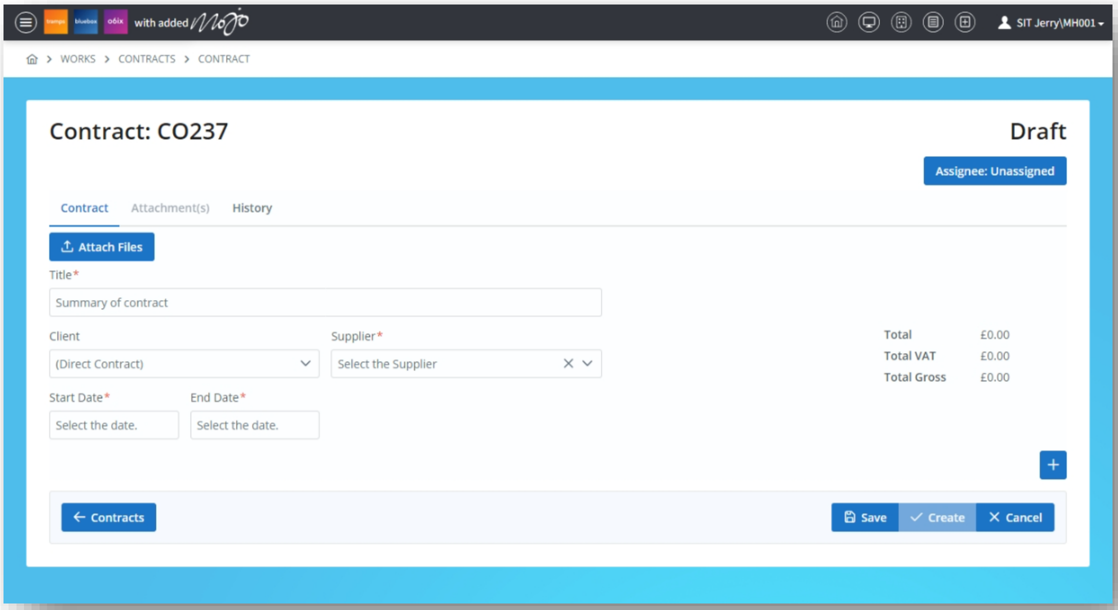


Clicking on the column header again will change the sorting order.

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



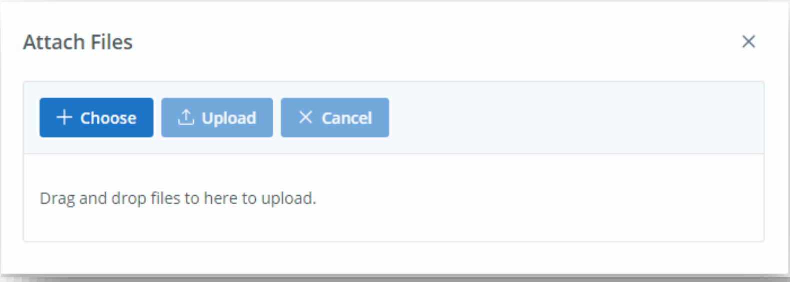
2.5.2 Creating a Contract



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

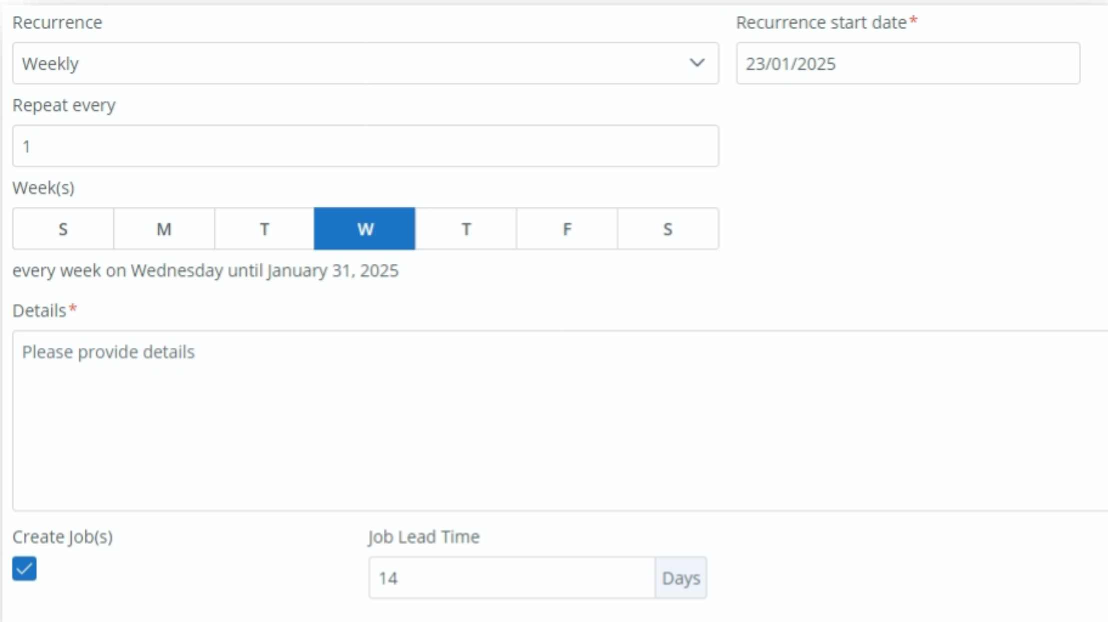
2.5.3 Contract Lifecycle

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



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.

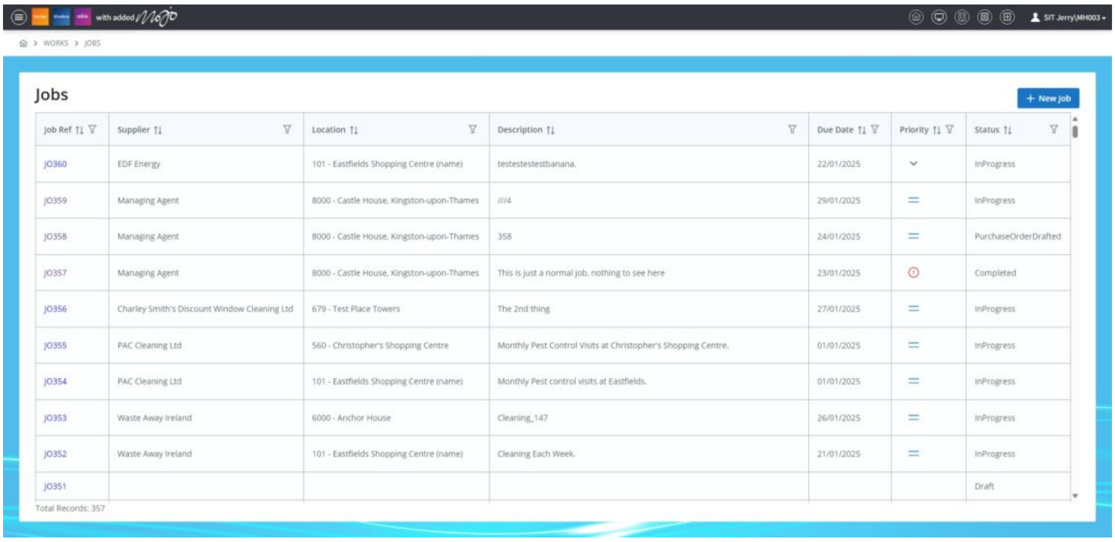
The comment along with the commenter's will be displayed on the Contract screen as a message which can be closed any time.

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	Supplier	Location	Description	Due Date	Priority	Status
JO360	EDF Energy	101 - Eastfields Shopping Centre (name)	testestestestbanana.	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

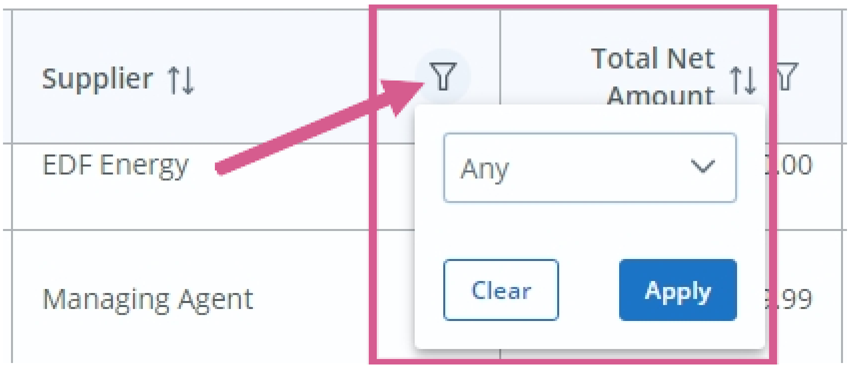
On the Contract lister page you can find the following columns:

- 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:

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

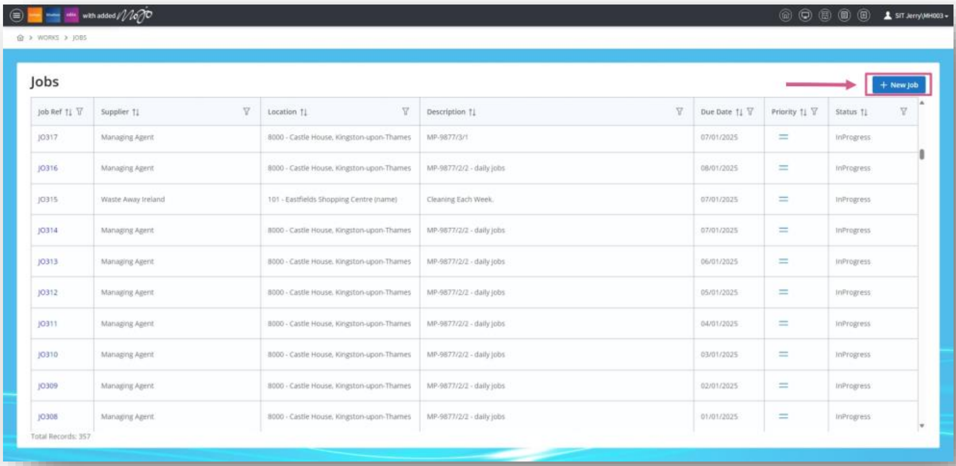
You can also filter by each column, using the filter button on the right end of each column header



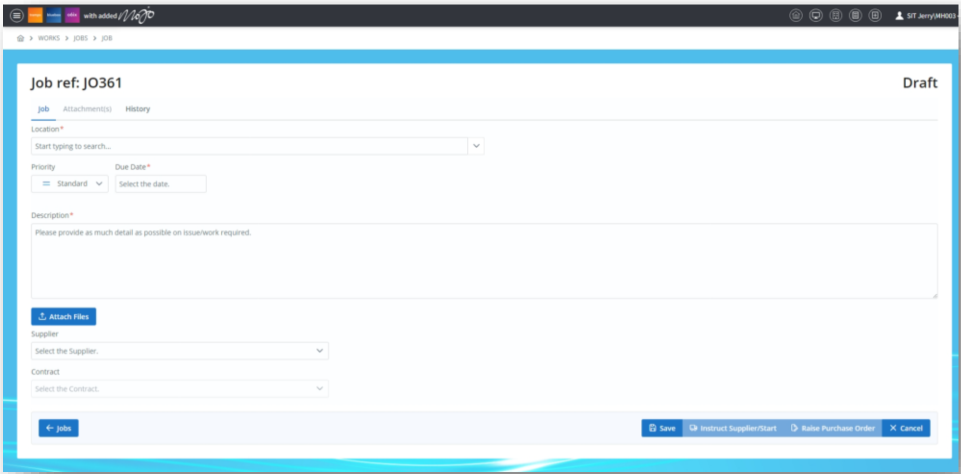
2.6.2 Creating a Job

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



3. Fill in the job details



- **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.

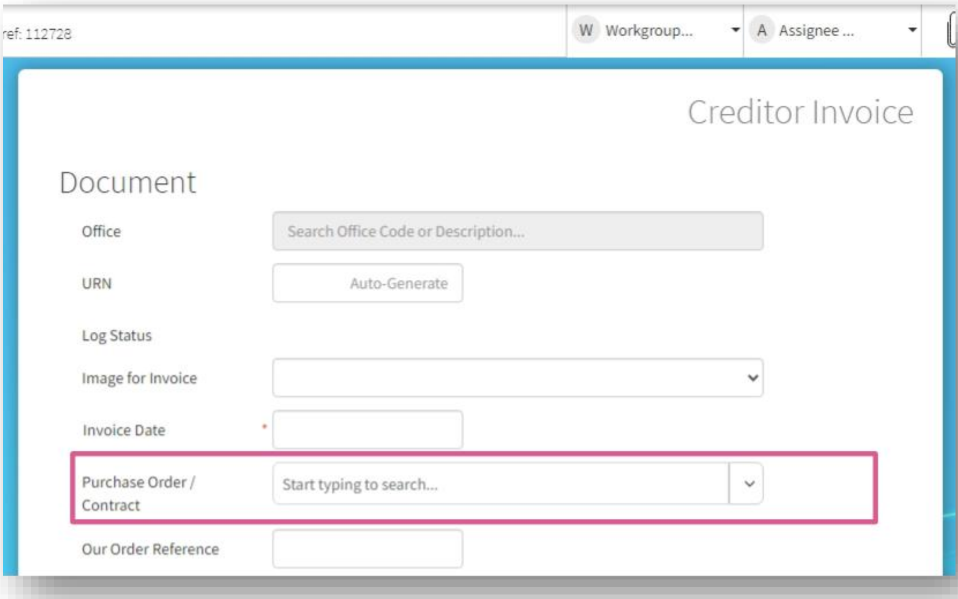
2.7 Invoice Processing

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.

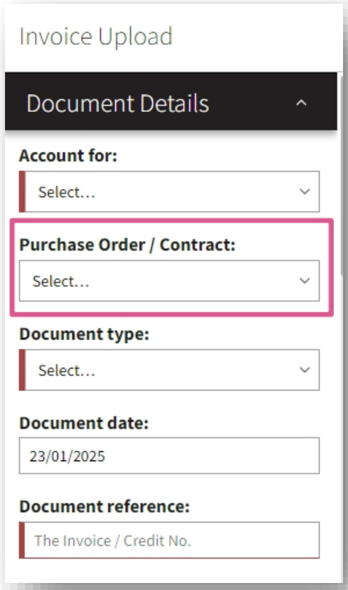
2.7.1 Invoice Posting

Invoices can be added to Mojo in two ways:

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



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

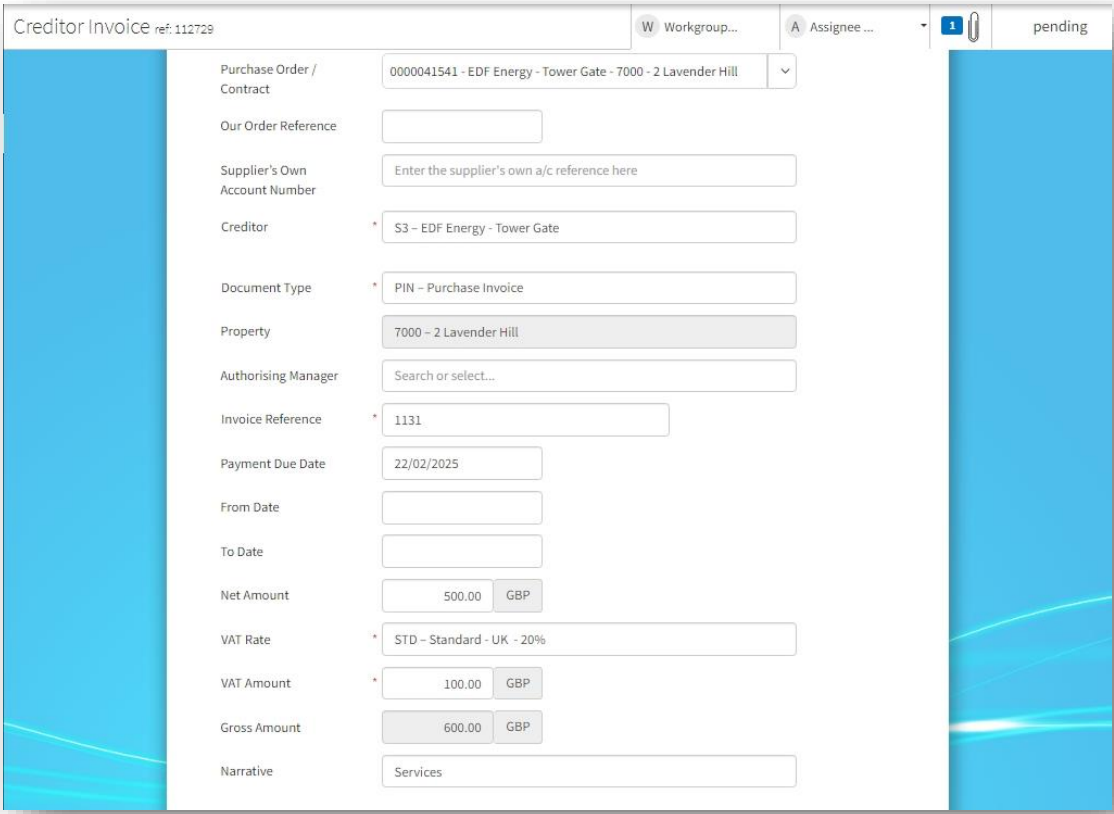


To manually add an invoice:

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.



2.7.2 Invoice Approval

Approval of invoice forms is subject to the WS003 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 WS003 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:

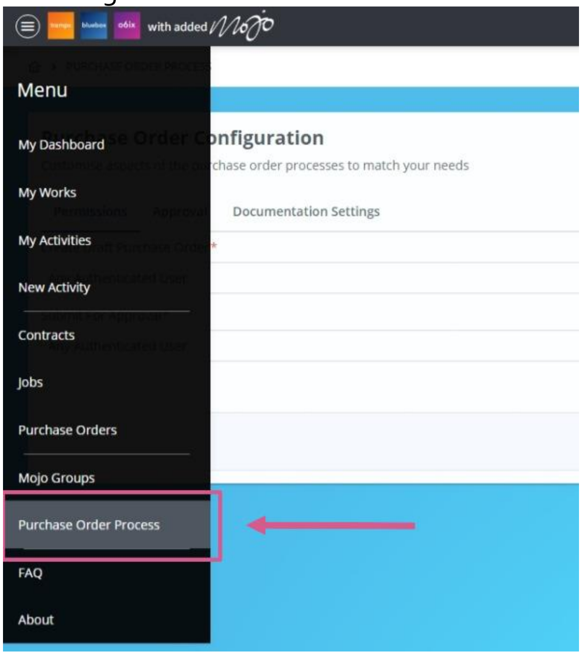
Menu > Mojo Groups

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

3.3 Purchase Order Configuration

3.3.1 Permissions

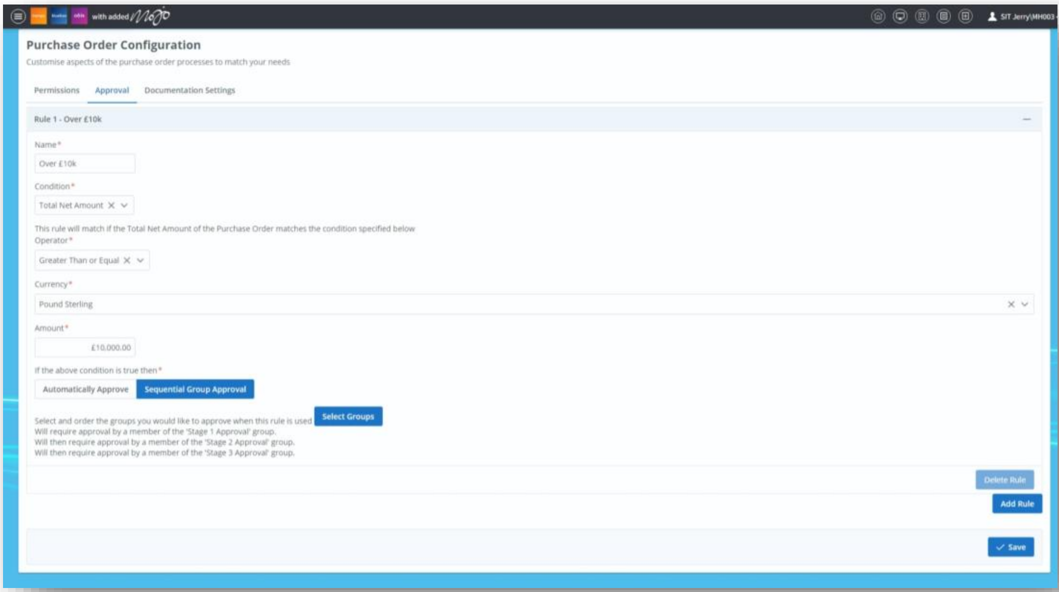
You can set permissions to purchase order creation and submission if you navigate to Hamburger Menu >Purchase Order Process > Permissions



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.



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

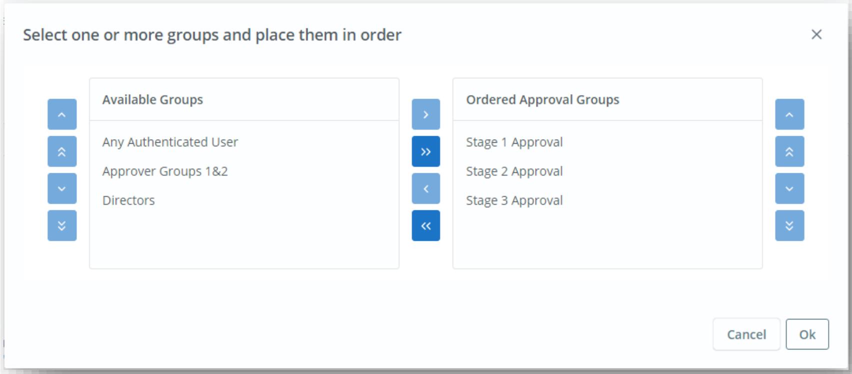
    2. **The Condition** – is it approval based on an amount?

    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**

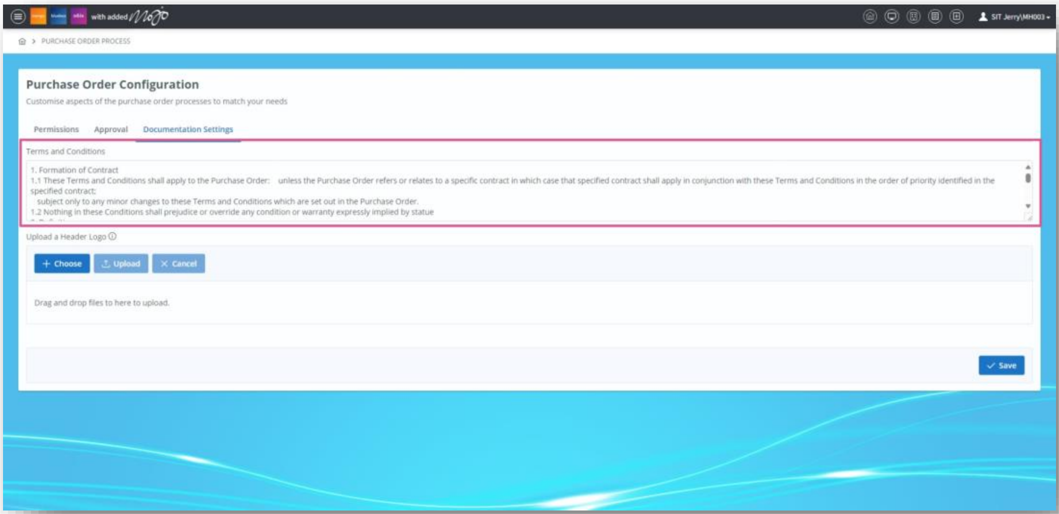


7. When you created all the rules, click "Save"

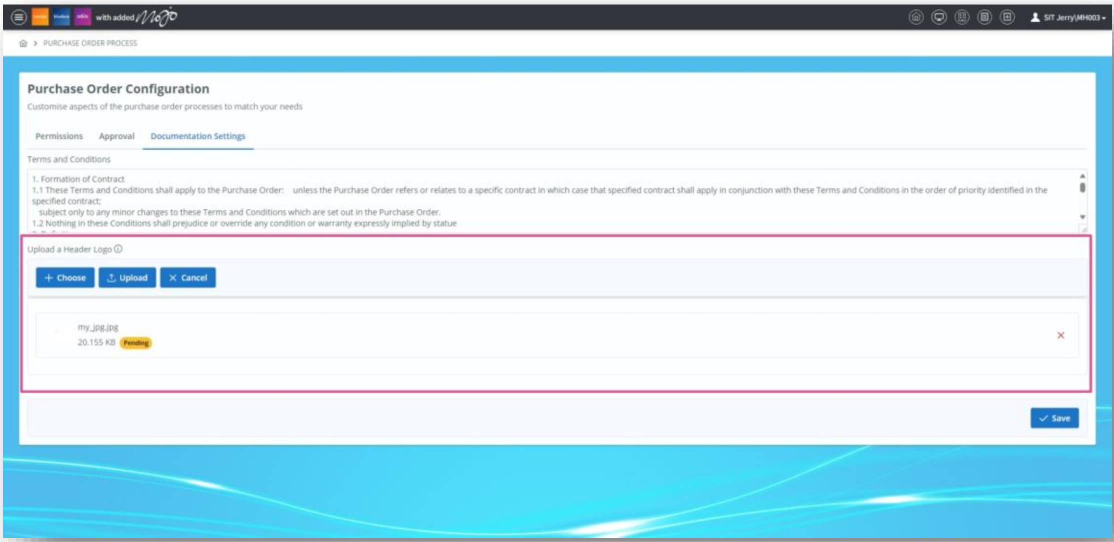
If there are no Approval Rules set, Mojo Works defaults to Automatic Approval.

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 your 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