Vendor Training Manual

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Invoice Instructions

Confirm the service request is in the PVINV status.

Each status has designated color coordination:

You can also filter by work order status:

Work orders filled in yellow are in Pending Vendor Invoice Status (PVINV).

From the "Action" dropdown, select "Invoice" to enter the online vendor invoice screen.

On in the Online Vendor Invoice screen, Click "Add Labor"

Online Vendor Invoice	**ECO CONSTRUCTION & MAINTENANCE** 39 Skyline Rd suite 1017 Lake Mary, FL 32746 407-478-3258	**INVOICE** Vendor Inv #: [ ] Invoice Date: 11/30/2012 Service Date: 11/30/2012 Received Date: 11/29/2012 Date Approved:

Billing Address:
FAMILY CHRISTIAN STORES
5300 PATTERSON AVE, SE
GRAND RAPIDS, MI 49530
616-554-8700

Location Address:
FAMILY CHRISTIAN STORE - 57
44943 SCHOENHERR RD
STERLING HEIGHTS, MI 48313
586-254-5557
FCS-057

Work details	Status: PVINV	Batch ID:
W/O# (FWO#)	Provider	Equipment
WEB-278265	ECO32746FL	

Requested by: WUSTMAN, JEFF
Service Details: had installed Cmas reg 5 and moved regs 1 and 5 at the cash wrap, we can't connect to the registers. There's no internet connection to them. I can connect to regs 2, 3 and 4. We checked the cable **Description of Work Done:** ECO Construction & Maintenance - ECO CONSTRUCTION & MAINTENANCE - 11/30/2012 9:17:10 AM MOD ENDS OF THE CAT 5 CABLES WERE NOT TERMINATED CORRECTLY SO OUR TECH TERMINATED THEM CORRECTLY AND NOW ALL CASH REGISTERS ARE WORKING CORRECTLY.
** **ECO Construction & Maintenance** - ECO CONSTRUCTION & MAINTENANCE - 11/29/2012 5:41:33 PM I have confirmed with Elizabeth, that service for tomorrow at 8:30 Am is perfect.
** **Email sent by:**
GARY WOODS on 11/29/2012 4:35:40 PM Subject: Work Order: WEB-278265 - FCS-057 - FAMILY CHRISTIAN STORE - 57 - MI To: info@ecogc.com; ashleyp@ecogc.com
** **GARY WOODS** -
11/29/2012 4:35:13 PM Eco - Please instruct the Tech to call our Help Desk while on site to verify the connections. FCS Help Desk 800-477-1475 ext. 8746
** What is the nature of the problem? Ask the caller if this is an emergency or can the service wait until the next day? If it can not wait then proceed with the work order. Yes If the service can wait until the next day please make sure you put this work order under the requst code of Yes

Item #	Description								Line Cost
	Name	Date	Start	Finish	Hours	Rate	OT	Line Cost	
	ECO CONSTRUCTION & MAINTE	11/30/2012	8:51	9:16	0.40	$0.00	N	$0.00	
1			Add Labor			Labor costs:			$0.00
2			Add Materials / Other Costs			Material / Other Costs:			$0.00
						Invoice Sub-Total:			**$0.00**
						Sales Tax:			0.00
						Total Tax:			0.00

Confirm the labor code has populated in the "Labor Code" field.

Enter the "Labor Rate", which is the hourly rate for the client.

Use the calendar icons to enter the start and finish times for the work order in the designated fields and click outside the calendar box to save your entry.

We are not going to use the OT box. If there is an OT rate, please calculate it within the labor rate.

In the "Hours" field, enter the actual number of hours worked.

Click the "Add" button to record your entry and to bring up another entry line. Repeat the above steps to record all service provided and associated labor rate/hours.

Add labor and materials
Work Order: **WEB-278265**   Status: **PVINV**   Description: **had installed Cmas reg 5 and moved regs 1 and 5 at the cash wrap, we can't connect to the registers. There's no internet connection to them. I can connect to regs 2, 3 and 4. We checked the cable**

Labor Code	Labor Rate	Start Time	Finish Time	OT?	Hours	Cost
ECO32746FL	0	11/30/2012	11/30/2012	☐	0.40	$0.00
		11/30/2012 12:20:19	11/30/2012 12:20:19	☐		▸ Add

Invoice - Materials/Other Costs

Enter a description of the cost incurred in the "Material/Other Cost" field.

Enter the quantity of the item in the "Qty" field.

Enter the "Unit Cost" of each item. The actual cost will be calculated automatically by fmPilot.

Click the "Add" button to record your entry and to bring up another entry line. Repeat the above steps to record all materials and other costs (trip charge, fuel charge, freight).

Material / Other Cost	Qty	Unit Cost	Actual Cost
			▸ Add

Generate Quote Instruction

If you anticipate the total costs for a work order (including Tax) will be greater than Do Not Exceed (DNE) amount, or you would like to suggest additional work done, you should submit a quote.

Generate Quote From the inside of the work order

Click on the WEB/PM number (blue hyperlink)

To generate a quote for a selected work order that is either "In Progress" or Pending Quote", choose Generate Quote for a specific work order simply by clicking the 'Generate quote' button at the bottom of the "Update Work Order" screen.

The quote form displays the details of the work order as well as any actual (or incurred to date) labor and materials costs that were entered for the job. It is essential that you enter your incurred cost to date, if applicable, before entering the costs and scope of work description for the proposed work

Click "View Quotation Details" to enter proposed labor and materials costs. FM Pilot will subtotal the costs automatically.

Incurred Costs to Date

Labor

Date	Laborcode	Hours	Rate	Cost

Materials / Other Costs

Date	Part	Qty	Price	Cost

Labor costs to date:	$0.00
Materials / Other costs to date:	$0.00
Total costs to date:	$0.00

View Quotation details

Description of work to be performed:

Estimated labor costs:	$0.00
Estimated material / other costs:	$0.00
Total Additional Costs:	0.00
Sub-Total:	0.00
Sales Tax:	0.00
Vendor Total Tax:	0.00
Total Quoted Cost:	0.00

▸ Generate Quote | ▸ Print | ▸ Back

Fill in the Labor Rate, Hours, Material/Other Cost, Qty, and Unit Cost.

After entering each line item, click add to lock the line item in place.

When ready, click "Close" to return to the "Quote" screen.

Important: After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.

Add labor and materials for quote
Work Order: **WEB-276511**   Status: **PQTE**   Description: ****** DO NOT DISPATCH!!****** TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST**

Labor Code	Labor Rate	OT?	Hours	Cost
SASOPS	40.00	☐		

▸ Add

Material / Other Cost	Qty	Unit Cost	Actual Cost

▸ Add

Important: After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.

▸ Close | ▸ Print

Enter the total amount of sales tax owed, based on the incurred and proposed costs.

Click "Generate Quote", to submit the quote to the client. You will be prompted to confirm the submission. Once the quote has been submitted, it cannot be modified.

Following submission, the quote is ready for review by client and the work order status will change to "Waiting on Approval."

Corrective Entry Steps

Correcting Labor Entries on Invoices and Quotes

When you enter a correcting entry in labor, enter the regular labor rate and then enter the number of hours as a negative (hyphen key over the letter P on the key board). You will see negative cost in the corresponding box. Click "Add" to enter the corrective entry.

Add labor and materials for quote
Work Order: **WEB-276511** Status: **PQTE** Description: ****** DO NOT DISPATCH!!***** TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST**

Labor Code	Labor Rate	OT?	Hours	Cost
SASOPS	$40.00	☐	2	$80.00
SASOPS	40.00	☐	-2	-80.00
				▸ Add

Corrective Entries in Materials

When you enter a corrective entry in materials, enter a negative quantity (hyphen key over the letter P on the key board) and regular unit cost. You will see the negative actual cost in the corresponding box. Click "Add" to enter the corrective entry.

As a result, your positive entry and your negative entry cancel each other out and become a net zero.

Important: After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.

Add labor and materials for quote
Work Order: **WEB-276511** Status: **PQTE** Description: ****** DO NOT DISPATCH!!***** TEST FOR TRAINING WEBINAR 10/3/2012 @ 2PM EST**

Labor Code	Labor Rate	OT?	Hours	Cost
SASOPS	$40.00	☐	2	$80.00
SASOPS	40.00	☐		
				▸ Add

Material / Other Cost	Qty	Unit Cost	Actual Cost
Door	1	$100.00	$100.00
Corrective Entry for Knobs	4	$75.00	$-300.00
Knobs	5	$75.00	$375.00
Corrective Entry for Door	-1	100	-100.00
			▸ Add

Important: After entering all labor and materials, you must click on the 'CLOSE' button below to calculate the correct quote total.

▸ Close | ▸ Print |

Status Change Steps

The status of the work order can be changed two different ways

1. <u>From the select work order screen</u>

    You can change the status of the work order by using the "Action" dropdown box.

2. <u>From the update work order screen</u>

    Scroll to the bottom of the page and find the "Status" dropdown box. Select the status that the work order needs to be moved into and click "Update" to make the status change.

Attachment Steps

Confirm file size does not exceed over 768kbs
Supporting files are .pdf .jpg .doc and .gif

Click the "Attach document" hyperlink.
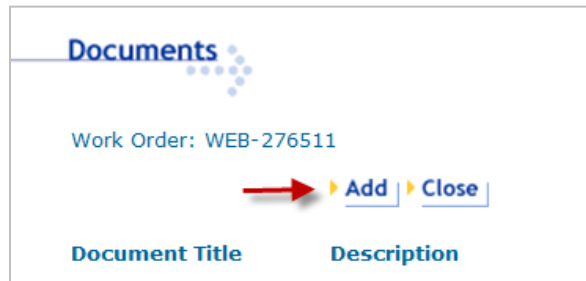
Click "Add" on the Documents screen.
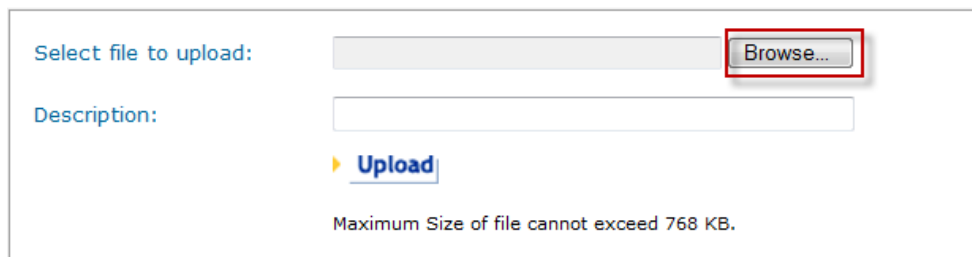
Then click "Browse" to find the attachment you would like to upload.

Once you find the document that you wish to attach, highlight the document by clicking on the name. Click on "Open" in the bottom right hand corner of the documents.
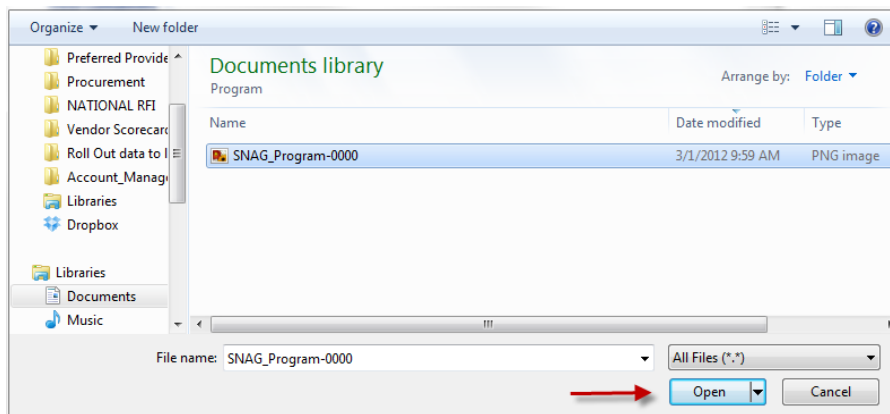
Add a description of the document you selected and click the "Upload" button to attach the document.

The attachment will then appear on the "Documents" page.

Setup user logins

Login as a Administrator

Select the "Administrate Site" from the Facility Service Desk.
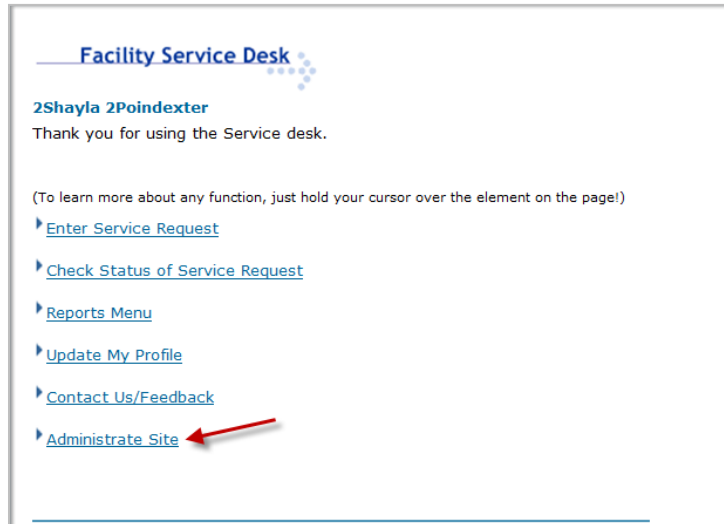
Click on the "Create New User" option from the Service Desk Administrator page.
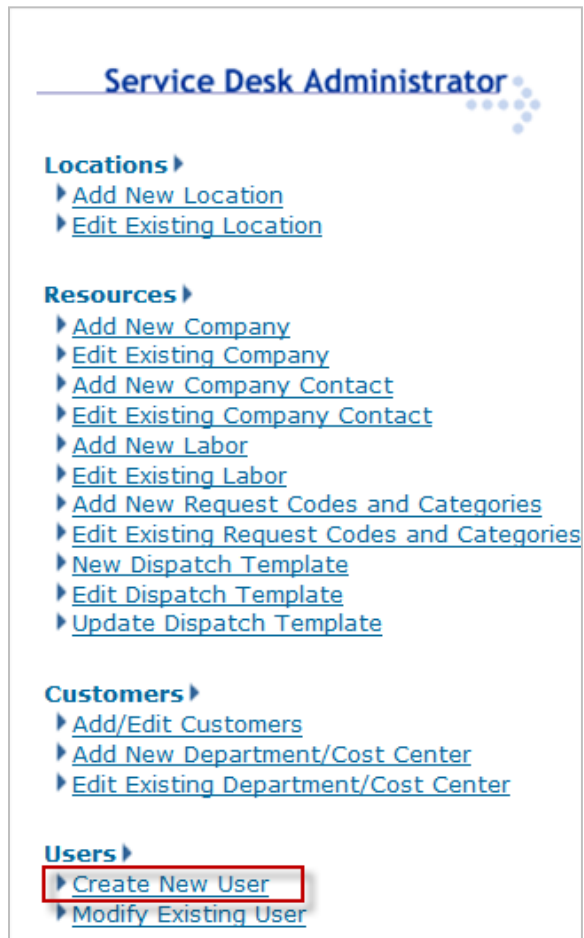
Select the "Provider Code" that the new user is to be associated with.

Enter the new user's contact information.

Also enter the "Alt Contact" and "Alt Phone" if there is an alternate available.

Select Dept/CC – use the default cost center.

For the location field, click "Change" and find the correct state.

Enter 01 for the "Floor Field"

Enter 1 for "Room" field.

Enter the "User Name" in lower case letters (typically the first initial and last name of the user).

Click "Submit" to create the login.

Then you will receive and error stating that logins were dispatched to the above email address .

One the login is dispatched, email the training template to new user along with training tutorials and vendor guide.
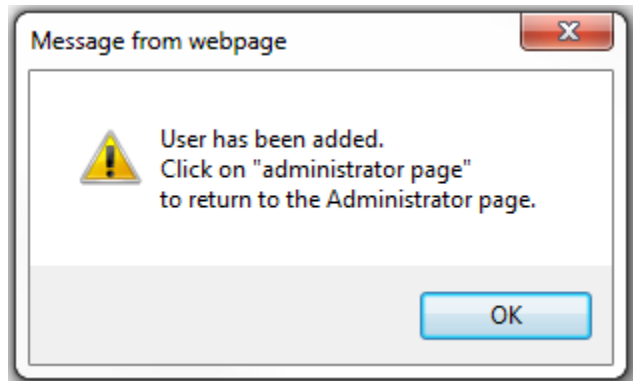
Delete Logins

Click on the Administrate Site option to bring up the Service Desk Administrator page.
Select the "Modify Existing User" option.
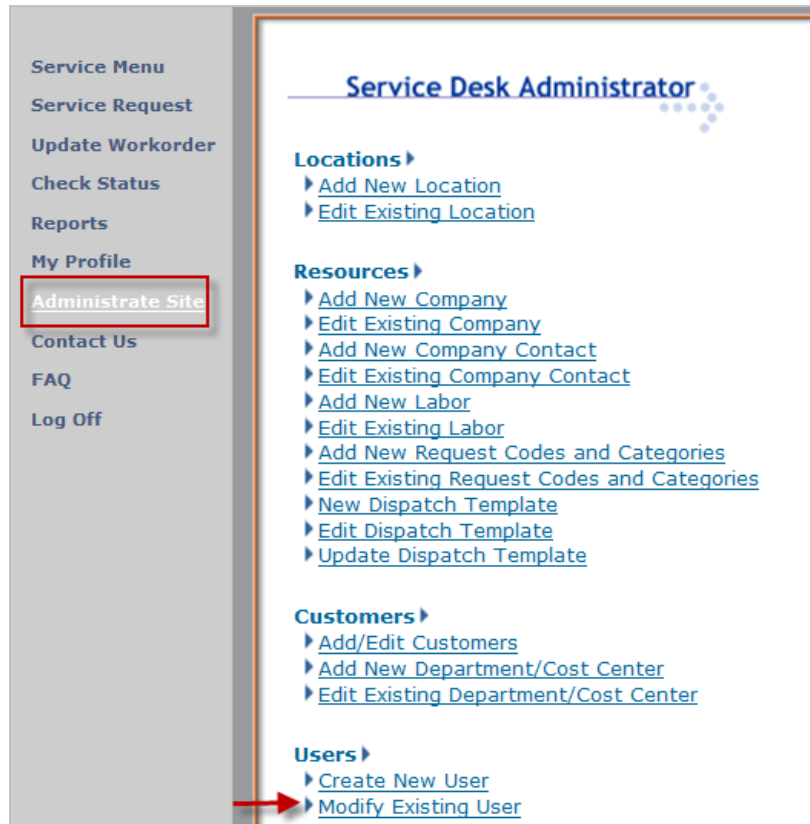
Insert the last name of the user you wish to delete.

Click "Find" to search for the desired user.

Select the user by clicking on the user's name in blue (Last, First).

In the Status dropdown box, select the "Inactive" option

Scroll to bottom of the page and click the "Submit" button.

The login will now be inactive.

Reset Password

Click on the Administrate Site option to bring up the Service Desk Administrator page.

Select the "Modify Existing User" option.
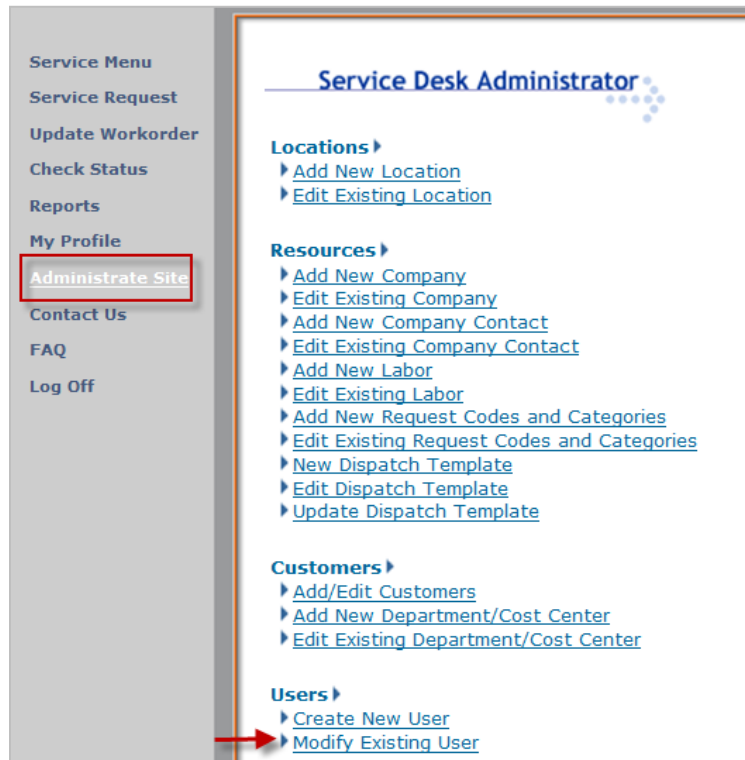
Insert the last name of the user you are resetting the password for.

Click "Find" to search for the desired user.
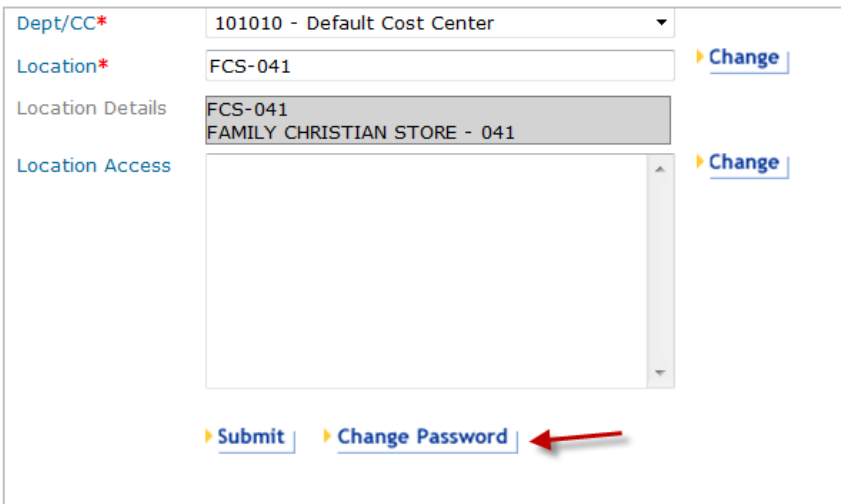
Select the user by clicking on blue hyper link
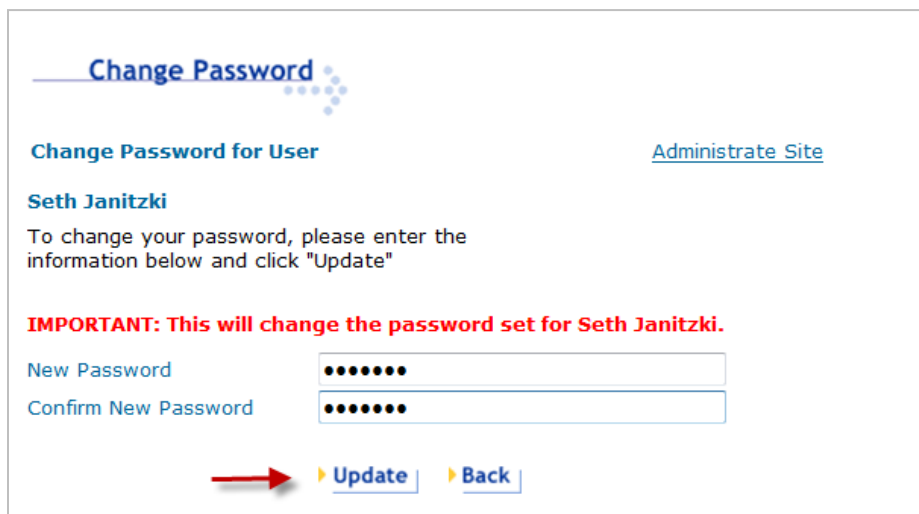
Scroll to bottom and click the "Change Password" button.

Insert the new password and confirm the new password.

Click the "Update" button to submit the new password.

Confirm that the user will be able to access their account with their new password by logging in and logging out using the newly created password.

Reports

Click the "Reports" option to bring up the Administration Reports page.

Use the dropdown box to select "My Work Order Report" or "Advanced Reports".

Click the "Show Report" button to bring up the selected report screen.

Select the desired filter from the r # 1 dropdown box.

Click "Load" to bring up the list of appropriate reports in the # 2 dropdown box.

Select additional fields that apply to the report you are pulling by clicking on the "Edit" button next to the field you wish to filter.

Select the "Date Range" you wish to have the report on.

Once the report and filters are selected, click "View" to execute the report.