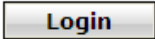
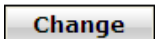


## Quick Reference Guide – Build Self Service

### Logging On

1. <https://selfservice.visionstream.co.nz/VisCore>
2. Enter your **User Name & Password** in the **Login** box
3. Click 

### Change Password

1. Click **My Account**
2. Enter your **Old Password**, a **New Password** then re-enter your new password in the Confirm **New Password** field.
3. Click 

### Dashboard - Home




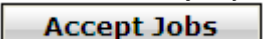

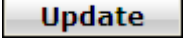
1. Select  [Build Services](#)

[Status Report](#)


| Status                           | No of Work Orders |
|----------------------------------|-------------------|
| <a href="#">New Job Assigned</a> | 0                 |
| <a href="#">Jobs Accepted</a>    | 13                |
| <a href="#">Jobs Completed</a>   | 7                 |

**Dashboard** view of all new and accepted jobs

### New Job Assigned

1. Click [New Job Assigned](#) to view all **new jobs**
2. New and Reassigned jobs will be colour coded:  
 - ReAssigned Jobs     - New Jobs
3. To view the **job description**, Click on the job description icon 
4. **Select** ☒ the job you wish to **accept**, then click on , this will move the job into the accepted list
5. To **reject** a job, click on the **edit** icon  and supply a reason for rejection, then click , this job will now **disappear** from your view.



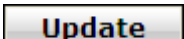
### Accepted Jobs (Work in Progress)

1. From the **dashboard** screen, click on the [Jobs Accepted](#) from the display list.
2. Or, click on the **Accepted** tab on the left of the **Home** menu.
3. To **edit / update** a Job, click on the view icon , this will display the **» Work Order** - all information pertaining to the job.


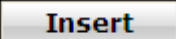
4. To view and edit the **task assigned**, select **» Tasks & Codes**, this displays three sectional panes:

- Tasks
- Design Build Documentation
- Payment Codes


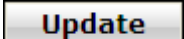
### View / Edit Tasks

1. Click in the line item to **select the task**, once selected, the line will display as grey, all attached documents and payment codes will now be displayed in the corresponding panes.
2. To view / download the documentation, click  to open / save the document and print
3. To view / edit **payment code(s)**, click on the edit icon , **progress** can be tracked by entering the **% Complete:**  field, and when the code is 100% **complete** the correct date must be entered into the **Completion Date:**  field.  
Click on  to save changes.
4. If **Sub-Contractors/Employees** are being used to perform this work, the names can you recorded in the **Sub-Contractor1:**  field, for record and reporting purposes.


### Variations

1. Pre-approval must be gained from the Field Manager before any variations can be added.
2. Select the **Task** and scroll down to the **Payment Codes** pane
3. Click on  **Add new record** in the **heading**.
4. Select appropriate **code** from the drop down list  
**Payment Code:**
5. Enter required **quantity** **Quantity:**  and enter the Variation **Cause** and a **reason** for the variation, please note that these fields are **mandatory**  
**Variation Cause:**  **Variation Reason:**
6. Click  to save changes.

### Completing Tasks (for Payment)


1. Select the **Task**, and scroll down to the **Payment Codes** pane
2. Click on the edit icon  and enter the **completed** date in the **Completed:**  field and click on  to save changes.
3. Ensure all **Payments codes** are completed before entering the completed date at the Task level.

## Quick Reference Guide – Build Self Service (Invoices)

- Upload the As-Built documentation, select the Task and scroll down to the Design Build Documentation pane and click  **Add new record**, select As-Built from the drop down Category

Category: **As-Built**

- Click **Browse...** and navigate to where you saved the scanned file, select this file and click **Open**. The file path will now be displayed in **Upload File:** **C:\Documen** and click **Insert** to upload the file.

- In the **Tasks** pane, click on the edit icon  and enter the **completed** date in the **Completed:** **1** field and click on **Update** to save changes.

- This will move the task to the complete list in the dashboard view. The Field Manager is required to **approve Tasks** before a Buyer Created invoice can be created

- Completed and Approved dates can be viewed in the summary pane




| Completed Date | Approved Date |
|----------------|---------------|
| 13-Oct-2009    | 13-Oct-2009   |

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### Invoices

- Select **Invoices** from the tool bar at the top of screen.
- These are sub-divided into the following categories:
  - New Invoice
  - Approved
  - Disputed
  - Resolved


### Approving an Invoice

- Click **» New Invoice** to view the invoice summary.
- Click  to view the invoice details, click on **Export to Excel** if required.
- Click on Explorer back arrow  to navigate back a screen.
- To approve invoices, click  and select **Invoice Status:** **Approved**, click **Update** to save changes. This will now move the invoice to the **Approved** category.

### Disputing an Invoice

- Click **» New Invoice** to view the invoice summary
- Click  to view the invoice details,
  - Tip:** click on **Export to Excel** if required.
  - Click on Explorer back arrow  to navigate back a screen.
- To **dispute** invoices, click  and select **Invoice Status:** **Disputed**, to resolve a dispute speedily, please provide a reason in the comments field **Invoice Status** **Comments:**, click **Update** to save changes. This will now move the invoice to the **Disputed** category.

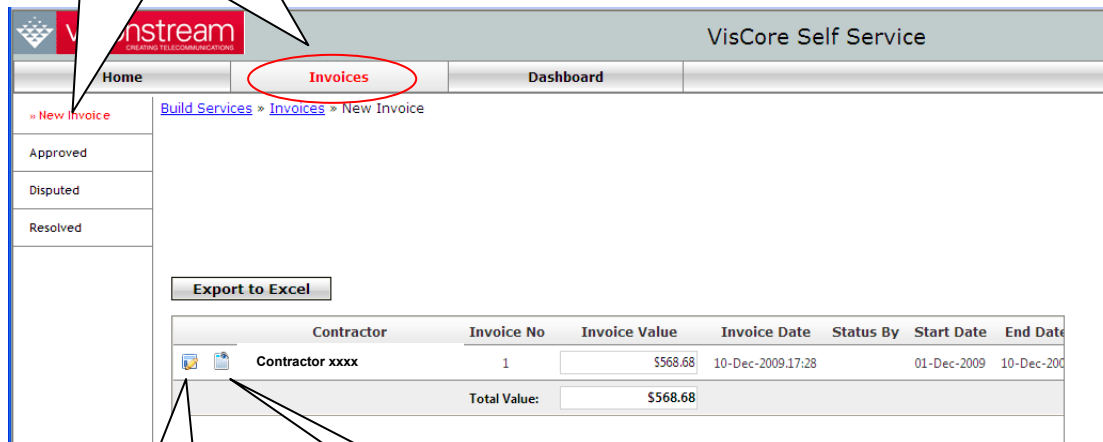
### Resolving an Invoice


- Once a **Disputed** invoice is **resolved** by the Field Manager / Contract Admin it will appear in the **Resolved** category with a comment.
- This can be either Approved or Disputed by clicking  and selecting Approved or Disputed from the drop down selection **Invoice Status:** **Approved**, please remember to provide a reason if the invoice is once again disputed. click **Update** to save changes. This will now move the invoice to the **Approved** or **Disputed** category.

## Quick Reference Guide – Build Self Service (Invoices)

### Invoicing

You need to be on the Invoices tab and New Invoice



| Contractor  | Invoice No | Invoice Value | Invoice Date      | Status By | Start Date  | End Date    |
|---|------------|---------------|-------------------|-----------|-------------|-------------|
|  Contractor xxxx | 1          | \$568.68      | 10-Dec-2009.17:28 |           | 01-Dec-2009 | 10-Dec-2009 |
| Total Value:  |            | \$568.68      |                   |           |             |             |

Approve or dispute invoice

View Invoice details