Contract / Sales Order Install with Scheduling & Mobile

Work Order Driven Installation and Service

Payroll Options for contractERP

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Meet your presenters

Bill Natalie

General Manager, contractERP

Joanna Broszeit

Manager of Client Services

Tracie Folscroft

Project Lead

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Agenda

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contractERP Work Order Solution:

- Sales Order Driven Installation

- Contract Sale – Installation Work

- Work Order based after-market Service Ticket

Resource Scheduling and Mobile Field Work Orders
- Demonstration of our Resource Scheduling Board
- Demonstration of our Mobile Field App for real-time Work Order Mgmt and Time Collection in the field.
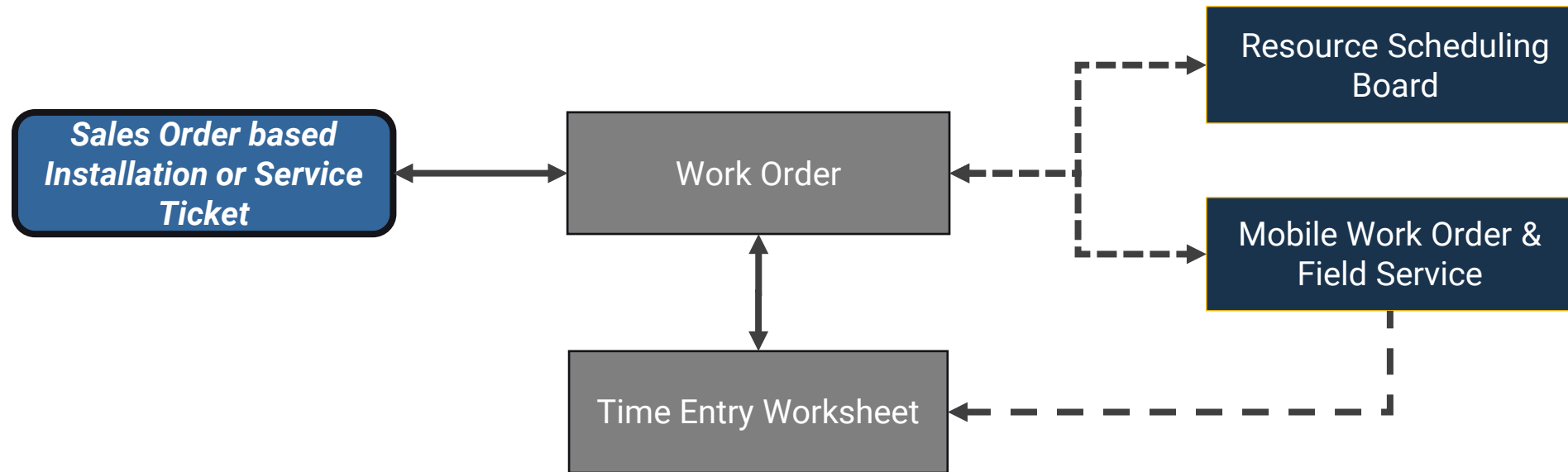
contractERP FSM – Field Service Management Solution
- Advanced Service Solution for businesses with a higher volume of Service Tickets and more complex Annual Service Contracts
- *See the contractERP FSM Solution at the Wednesday 9am Session!!*

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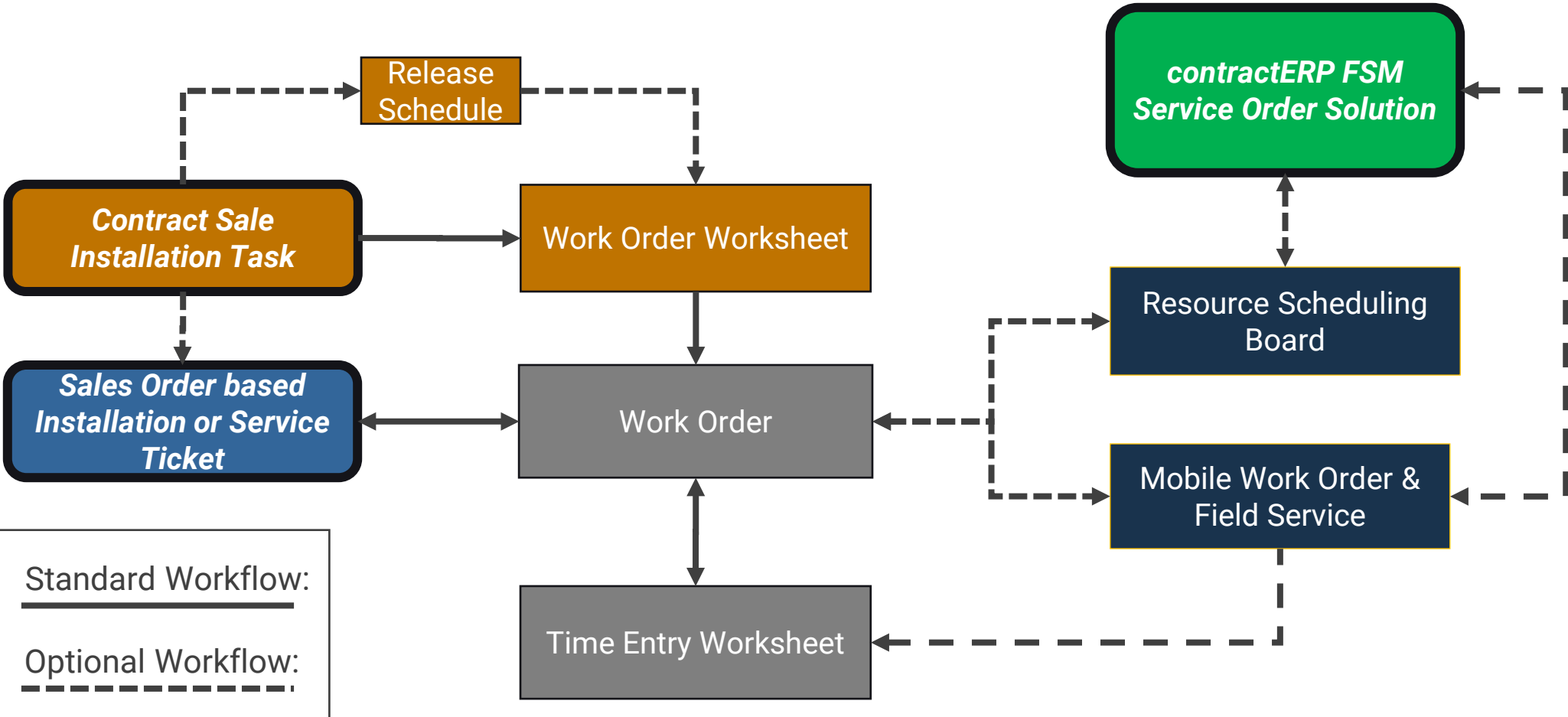
Sales Order to a Work Order Installation and Service Workflow

Sales Order to a Work Order Installation and Service Workflow

Work Type Item	• Item Type = Work Code. • Linked to configurator • defines rules of the Work Code.
Entering a Sales Order for Installation or Service	• Enter Sales Order as normal. • Set Requested Date. • Select a Work Code Item. • Adjust the Planned Time (Capacity) if needed. • Create Work Order, which can automatically send it to the Resource Scheduler, if in use.
Resource Scheduling (Optional)	• Work Order Request is initially listed as an Open Task. • Dispatch Scheduler drags the Work Order task to a specific Resource and date/time. • The contractERP Work Order & Sales Order are updated.

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cERP Sales Order to a Work Order Installation and Service Workflow

Mobile Field Service (OPTION)	• Installer/Tech receives the assigned Work Order directly within the app.
	   • Options exist for what data is presented.
	• Tech selects Work Order, views details, and starts time for task.
	• Tech takes a picture of completed work, gets a signature from the customer, and finishes Work Order.
	• Installer/Tech's work is synced back to contractERP.
	   • Signature, notes & pictures are sent back to the Work Order from the App.

Time Entry within contractERP	• Time is collected by the Installer/Tech for the Work Order. • Time Entry can come directly in from the Mobile app or Entered in to the Time Sheet. • Time is Submitted, then approved (posted). • Work Order is either Closed (posted) in this process, or separately.
Complete the Sales Order	• Sales Order is updated based on Work Codes setting (i.e. T&M vs Fixed). • Sales Order is posted, and the ticket is complete.

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Demo

Use of Serviceable Items for a Work Order Service Ticket

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Serviceable Items (Optional)

- Definition - Customer Owned Items that are Serviceable.
- Items sold can automatically be setup, so they become serviceable items.
- Default Item setup options include:
  - Serviceable Boolean
  - Serviceable Work Code
  - Warranty Type

Create Sales Order from Serviceable Items List

- Find Serviceable item quickly through the Serviceable Item List function.
- Auto create a Sales Order & Work Order directly from the Serviceable Item.
- Select a Work Code Item.
- Adjust the Planned Time (Capacity) if needed.
- Work Order, can be auto sent to the Resource Scheduler.
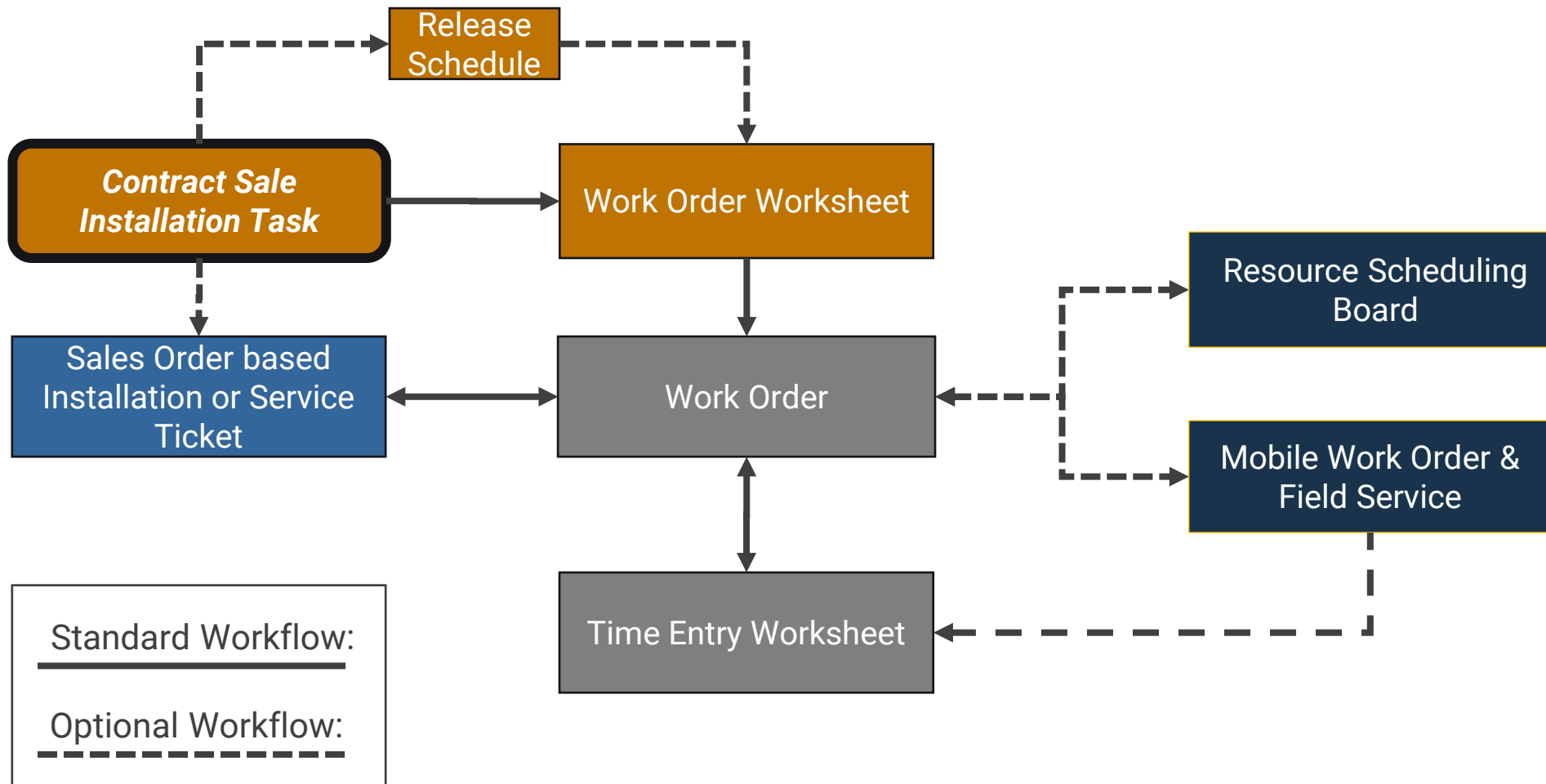
Resource Scheduling (Optional)

- The Work Order Request is initially listed as an Open Task.
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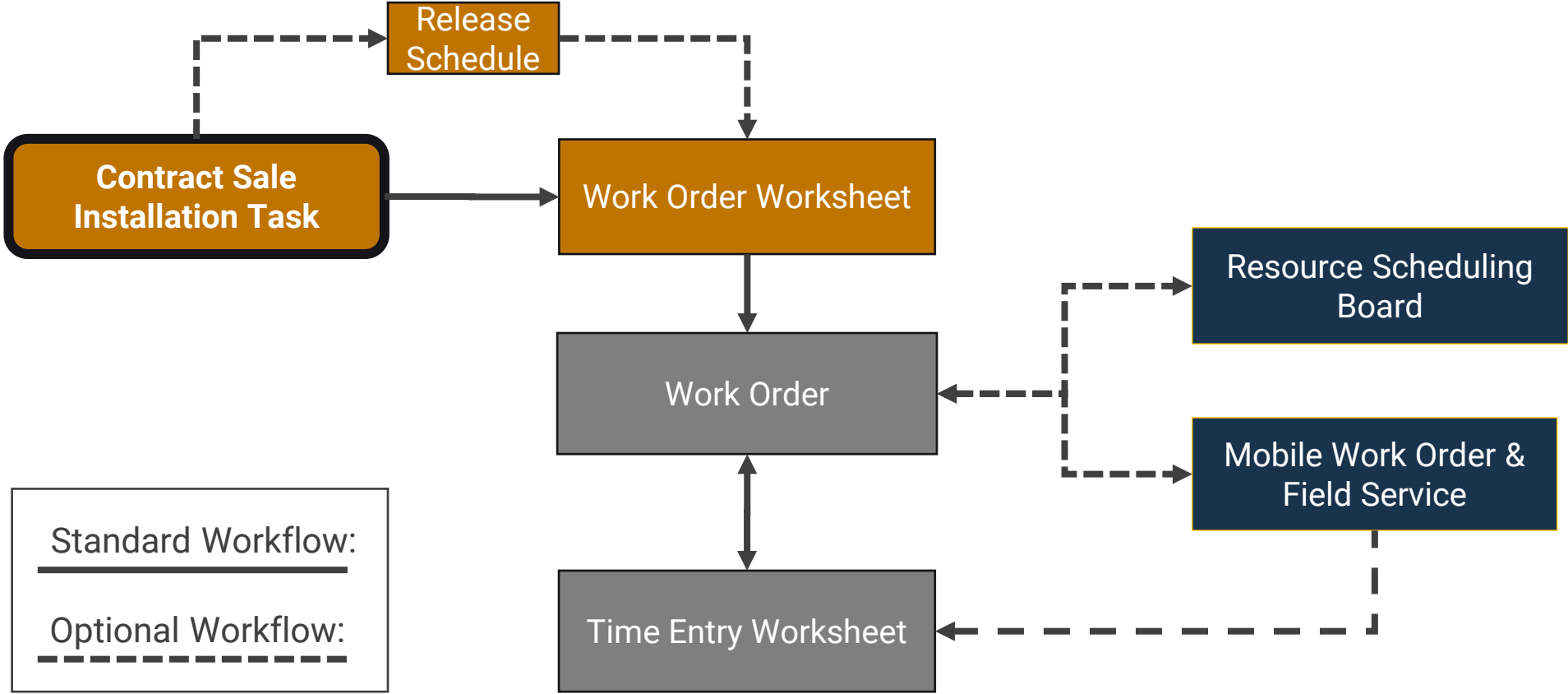 - The contractERP Work Order & Sales Order are updated.

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Contract Sales Installation Workflow

Contract Sale sends directly to a Sales Order, which creates a Work Order

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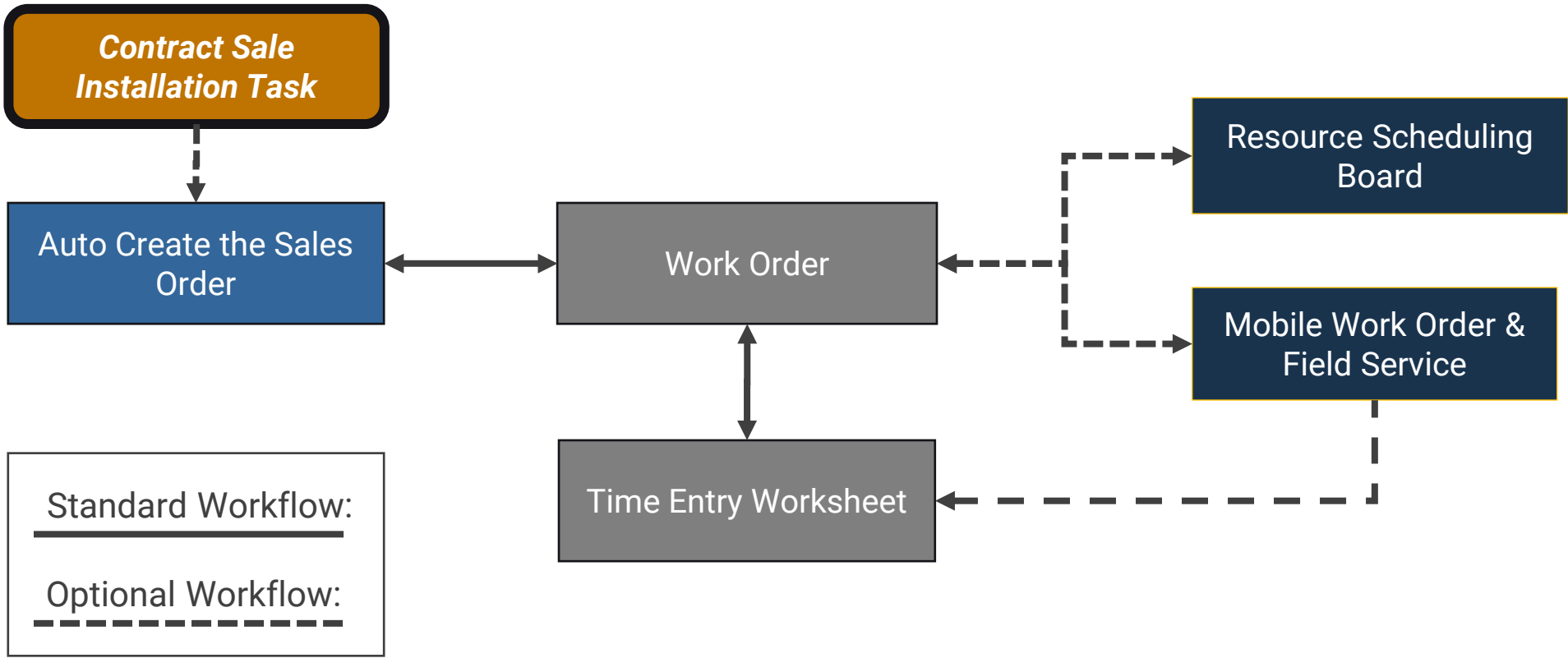
Contract Sales Installation Workflow

Work Type Item	• Item Type = Work Code. • Linked to configurator • Defines rules of the Work Code.
Entering a Contract Service Line	• Go to the Services Option within a Contract Sale. • Select a Work Code Item. • Based on Work Code, it may be assigned to Material or Assignments (Openings). • Adjust the Planned Time (Capacity) as needed. • Set the Dates the Service needs to Start or Finish. • Release Service to be scheduled and issued to the field.
Work Order Worksheet and Work Order	• Contract Services can move to a Work Order EITHER through the Work Order Worksheet, or through a Sales Order. • A Work Order is generated to perform the installation. • Once a Work Order is generated, the Task is sent to the Resource Scheduling Board.
Resource Scheduling (Optional)	• The Work Order Request is initially listed as an Open Task. • The Dispatch Scheduler drags the Work Order task to a specific Resource and date/time. • The contractERP Work Order & Sales Order are updated.

Contract Sales Installation Workflow

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Third Party Payroll Options for contractERP

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Time Entry to Payroll	• Time reported back from field. • Reviewed & posted in Time Entry. • Then exported or sent to ISV Payroll Journal. • Manually adjusted (as needed). • "Complete" Payroll journal created.
Vetted 3rd Party Payroll Options	Greenshades Integrity Data®
Other Payroll Requirements Common to Install Work	• Certified Payroll • Prevailing Wage • Need your input… • Frequency, # of jobs

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Thank You!