

Jobs

A new Job can be created by converting a Quote that has been accepted and approved. Or it can be created from scratch and a Quote created afterwards.

The Job record will have relevant company information and the services that will be delivered. It will also outline how the Job is being charged (cost per service or a retainer).

Staff Resource schedule

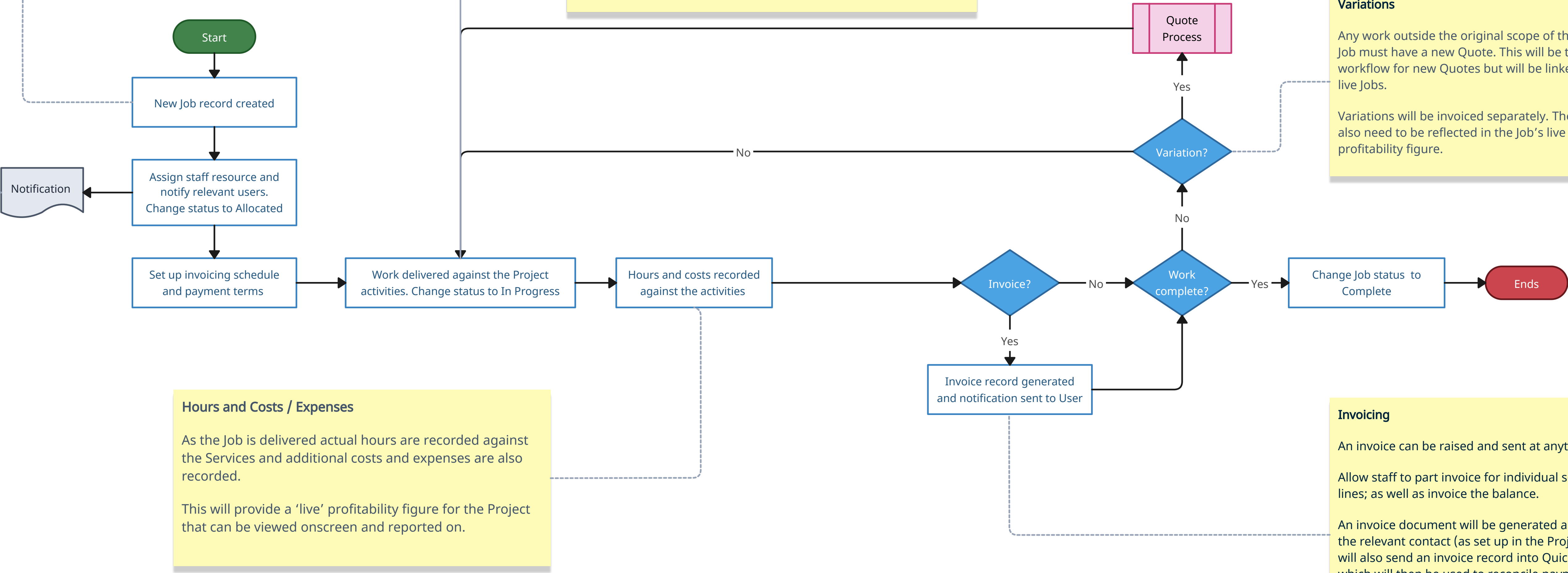
Resources can be staff or sub-contractors.

Show a resource schedule so Admin will know who is assigned to relevant Jobs and who has capacity / availability.

Staff and Sub-Contractors filtered by location and skills so only relevant staff resource can be allocated.

They will also have a 'cost' to the business that will be used when tracking profitability of a Job.

Service Delivery Process



Job Delivery

For each of the services added to the Job there will be the option to record a list of activities / tasks required to fulfil the service.

There will also be an audit history of all communications and activity carried out for the Job as well as any required delivery dates etc.

Jobs on retainer will show the services scheduled and delivered. If there is a pause then the Job status will change and any retained fees will pause.

Variations

Any work outside the original scope of the agreed Job must have a new Quote. This will be the same workflow for new Quotes but will be linked to the live Jobs.

Variations will be invoiced separately. They will also need to be reflected in the Job's live profitability figure.

Invoicing

An invoice can be raised and sent at anytime.

Allow staff to part invoice for individual service lines; as well as invoice the balance.

An invoice document will be generated and sent to the relevant contact (as set up in the Project). This will also send an invoice record into QuickBooks which will then be used to reconcile payment received.

On payment received the invoice record in the system will be updated