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BOSS

Snow — Catalog & Job Set up

Version 9.12

Created By the INTEGRA group

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1. Overview

Within the snow industry there are many different types of snow agreements. They mostly fall under three categories, but there are many variations within the three categories. Though BOSS can handle all three types, there are some differences in how they should be set up and in turn how they will ultimately be invoiced. This guide explains the differences and how to use each type within BOSS. It is possible that the customer/property may have multiple agreements of similar or different type in place during the Snow Season.

This guide will discuss in detail the following three types of snow agreements:

- **Time and Material (T&M)**: This type of agreement will invoice at an agreed upon hourly rate for the time worked. A material markup will be applied to the materials used to complete the job. The T&M Work Order will invoice based on the actual Time and Material used to complete the work. Different markups can be specified for Material, Equipment, and Subcontractors and these markups are applied to produce an invoice.
- **Seasonal**: This type of agreement will invoice a fixed, reoccurring amount over the Snow Season or period of the contract. The property will be invoiced an agreed upon amount regardless of the number of Snow Events that occur and regardless of the amount of time and material used to complete the events.
- **Per Occurrence**: This type of agreement will bill a fixed amount whenever a particular service is rendered throughout the period of the contract. The pricing and structure of the services can vary based on the set up and the price for each occurrence.

  Specific examples of a per occurrence contract include:

  - Invoice Per Event (or Series of Events)
  - Invoice Per Push (or Per Application)
  - Invoice Per Inch (or Per Accumulation)

  As Snow Events occur and services are rendered, the corresponding services are completed and the fixed, agreed upon amount for the event (or visit, push, application, etc.) is invoiced. Invoicing is not based on the time or materials used to complete the occurrence.

Note: This guide is meant to be a preface to the "Snow Settings and Event Management Reference Guide." It explains how bids of various types can be created in BOSS. Each section concludes with a brief description and example of invoicing but does not go into detail on how to schedule, work or ticket a Snow Event. Please see the "Snow Settings and Event Management Reference Guide" for this information.

It would be impossible to include every possible scenario in this document so feel free to contact eSupport with questions related to your specific circumstance. If you are currently in implementation and have service catalog questions, please contact your Implementation specialist.

2. Time and Material (T&M) Work Order

The first common type of snow agreement is a T&M job where the invoice consists of the actual time and material used to complete the work. An hourly rate is set for Labor, and different markups can be specified for Material, Equipment, and Subcontractors. These markups are applied to produce an invoice.

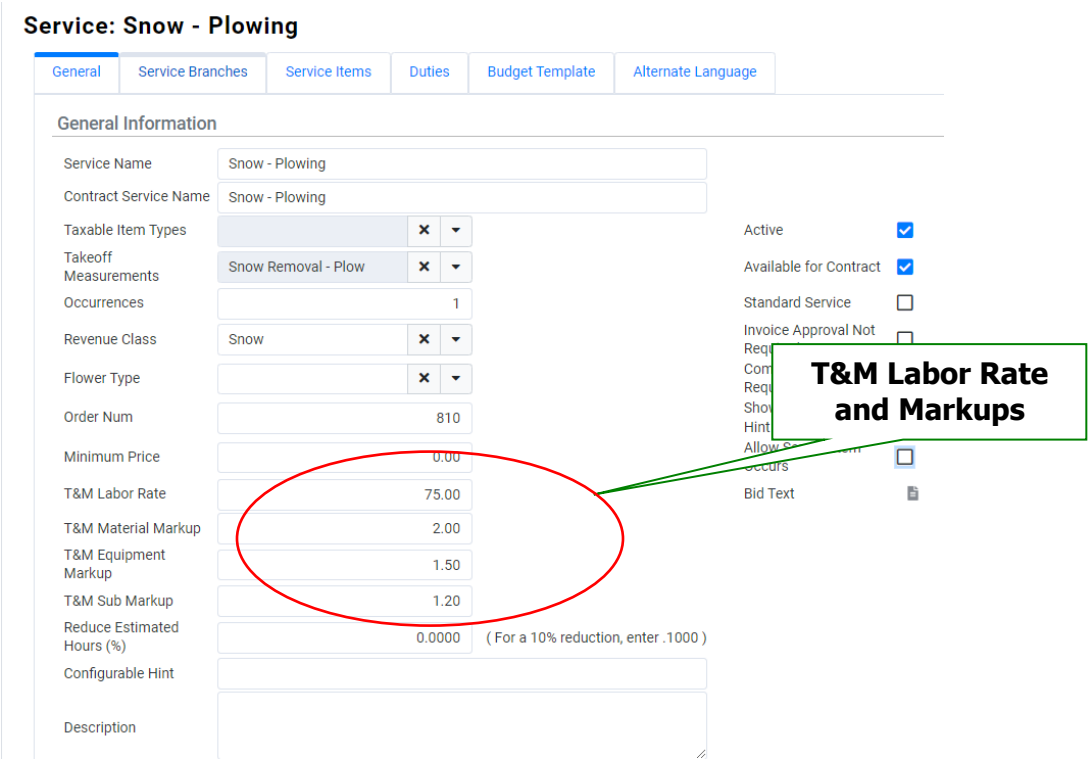
Service Catalog Setup

The Service Catalog is the foundation for estimating, working and invoicing jobs in BOSS so it is important that it is configured correctly. Each type of snow agreement has some specific points of configuration which are noted below.

Services

The Services to be used for T&M Work Orders should be broken down by type of service and the Hourly Labor Rate and Markups to be used. If there were a reason to have different hourly labor rates or default markups, there should be a separate Service. As an example, there might be Services for:

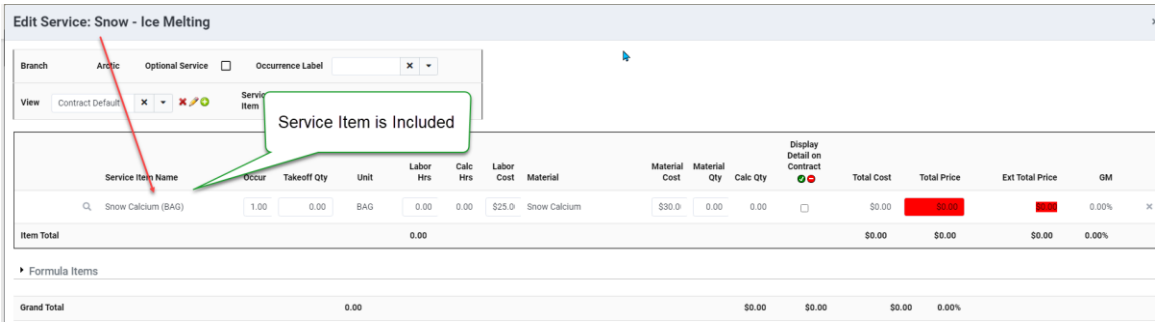
- Snow Plowing
- Snow Salting
- Snow Shoveling
- Snow Loader

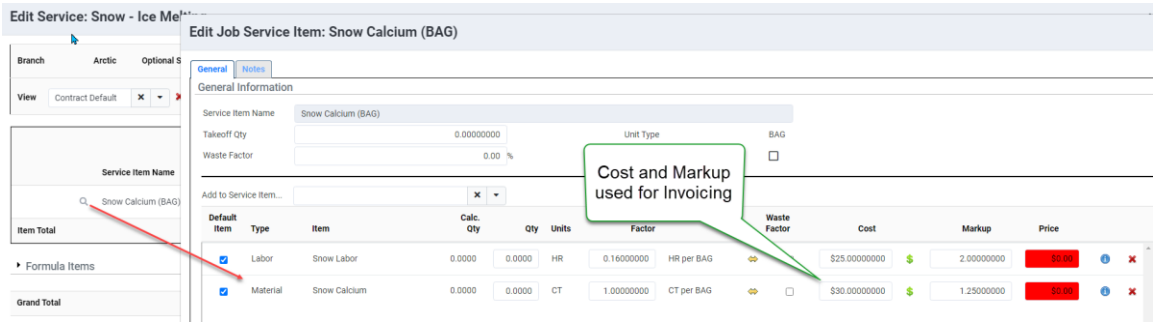


Service Items

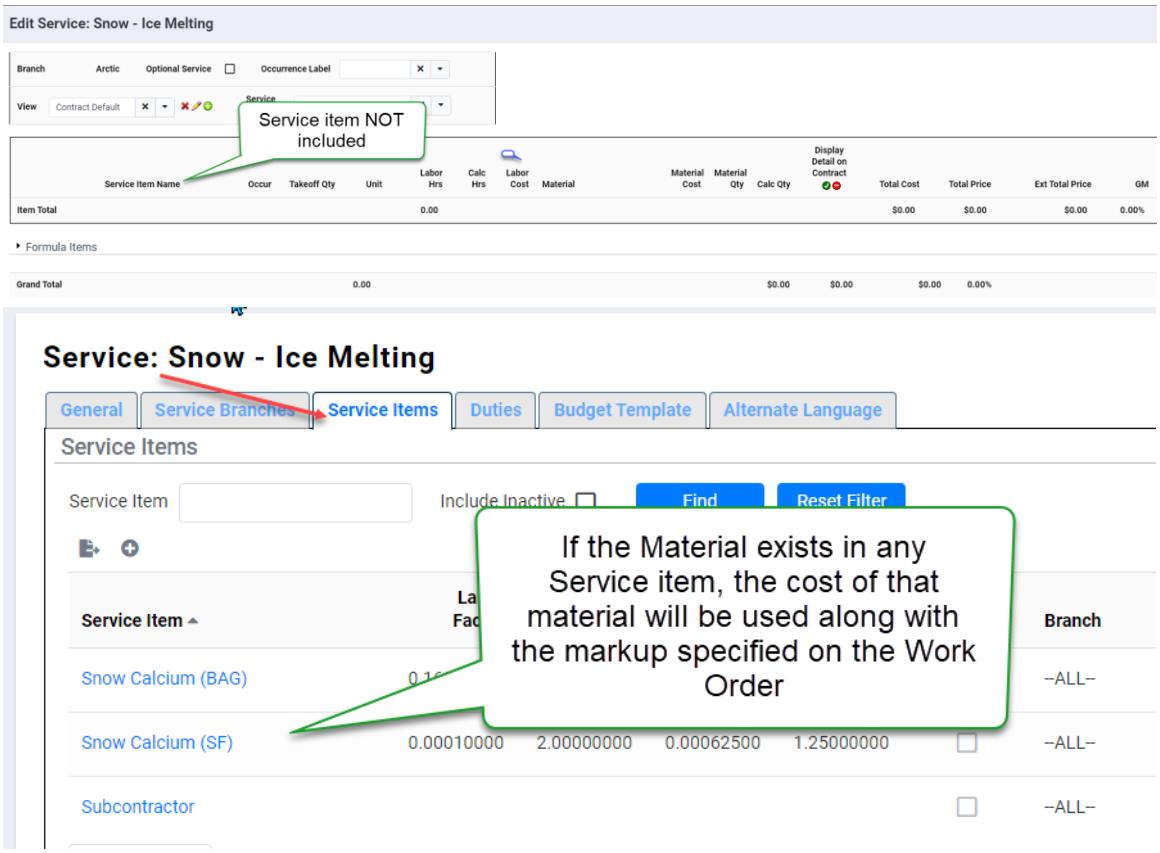
Though strictly speaking Service Items are not required for T&M Work Orders, if you plan to estimate the usage of materials and estimated time for bidding purposes, you will want to have the appropriate service items that make up the snow service.

- When Service Items are included on a T&M work order bid:
  - The maximum cost (if the item was included more than once) of the item will be used including the markup. In addition, the markup that will be applied to the material will be the markup specified on the included Service Item and **not** the markup from the Service. In other words – if material used for a job has been included in the Work Order, the cost and markup from the Service Item will be used.
  - Therefore, it is possible to set a specific price for each non labor item by setting the specific cost and markup on a service item.





- When Service Items are **not** included on the bid:
  - BOSS will check for the cost of the item under any Service Items in the catalog for the Job Ticket's Service. If the material is found in one of the Service Items for the Service, this cost will be used. The material markup specified on the Work Order for the Service will be used.



- If it is not found in the Catalog under the Job Ticket's Service, BOSS will go to the Purchase Order Receipt for the material used to get the cost of the Item allocated to the Job. If the Receipt is Approved for Payment and Closed, BOSS will use the actual cost, otherwise BOSS will use the estimated cost from the PO. The material markup specified on the Work Order for the Service will be used.

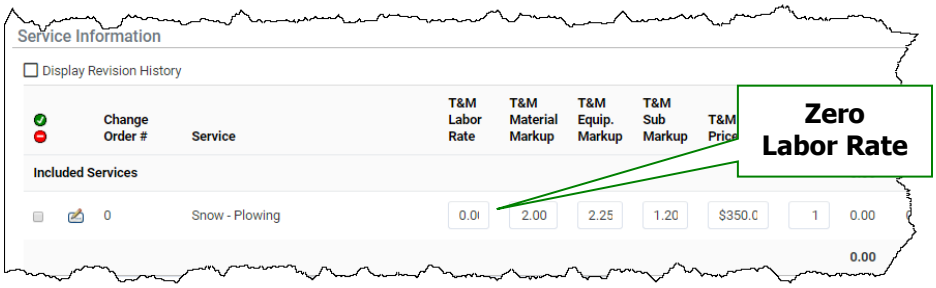
Regardless of whether Service Items are included or not, the Labor Rate will be based on the rate set on the Service on the bid.

Equipment Only Service Items

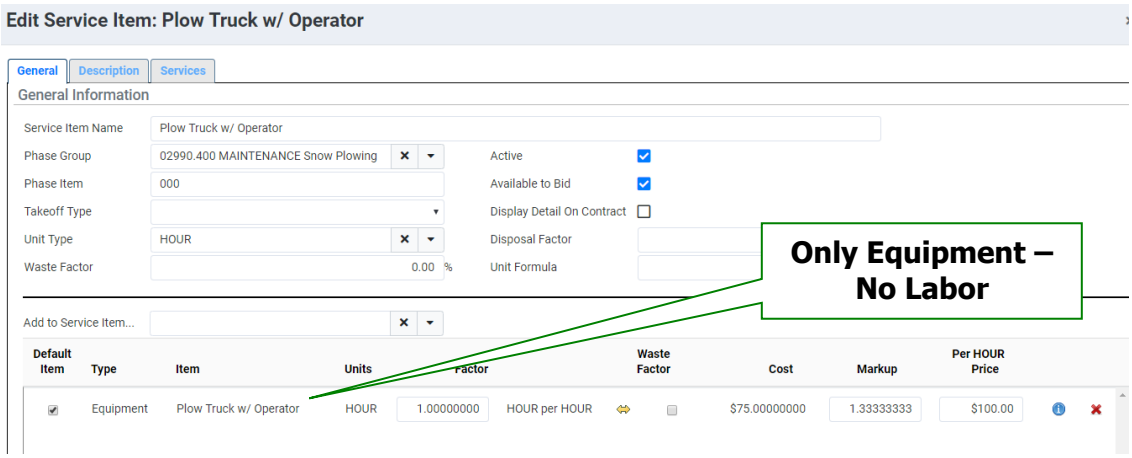
Sometimes the business practice or the customer preference is to be charged for the Equipment and to have the Labor included in the Equipment price. In this case, the Service and Service Items would be setup a bit differently so that the Labor for operating the Equipment is in the markup for the Equipment.

The Service would be set to have a zero-dollar Labor Rate. This means that any Labor reported to the Job will not be invoiced. Labor is still reported to the Job Ticket (for Job

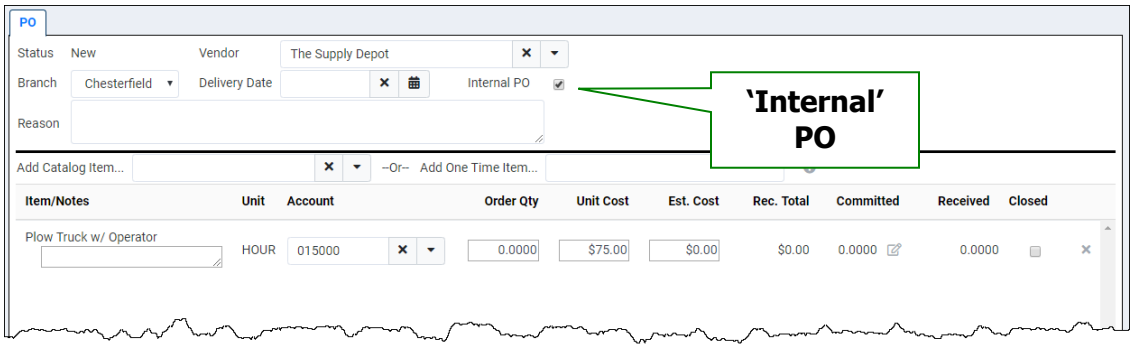
Costing and Payroll) but the invoice amount for this labor will be zero.



The Service Item is setup to use an Equipment item only and the Markup is set to account for the Labor needed to operate the Equipment.



Since this type of Service Item is Equipment only, there will need to be a Purchase Order in the system for this Equipment so that allocations and invoicing can be done. The Purchase Order would be an 'Internal' PO (so that the transaction does not transfer to accounting) and will need to have receipts so that allocations can be made to the Job Ticket.



Work Order

There are three ways that snow T&M work orders can be created:

1. Create a separate T&M Work Order (or Quick Work Order) for each event that includes all the services to be provided. After each event, the Job Ticket and Work Order are closed, and an invoice is sent to the customer.
2. Create a single Progress Bill T&M Work Order for the entire season. This method offers the ability to create a Progress Bill invoice as desired. This method also reduces the number of work orders and tickets that must be managed but limits the ticket-based job costing to the entire season.
3. Create a single Progress Bill T&M Work Order for the entire season with the number of Occurrences set to the number of months on the Work Order. This method allows the job costing to be viewed by month (per ticket).

The example illustrated below is for a T&M Work Order. The Work Order is setup as T&M Bill Type with the start and end dates reflecting the start and end of the typical Snow Season. This type of Work Order has also been set to 'Progress Bill'. Setting the Work Order to Progress Bill will allow the Customer to be invoiced for work as it has been completed and invoicing will not need to wait until all Services are complete.

Note: If there is a Minimum Price for the Service, this minimum is applied at the time of invoicing and does not apply to each 'event' or day worked.

1.1. Example 1: The Minimum Price for a Service is $350. Someone works the Job on Tuesday and the value for the work that day amounts to $100. Someone works the Job again on Wednesday and the value for work that day is $75. The invoicing is done on Thursday and the system sees that un-invoiced work amounts to $175 but the Minimum Price for the Service is $350. In this case, BOSS will invoice the customer $350.

1.2. Example 2: The Minimum Price for a Service is $350. Someone works the Job on Tuesday and the value for the work that day amounts to $100. Invoicing is done at the end of the day and the system sees that un-invoiced work amounts to $100 but the Minimum Price for the Service is $350. In this case, BOSS will invoice the customer $350.

Someone works the Job again on Wednesday and the value for the work that day amounts to $75. Invoicing is done at the end of the day and the system sees that un-invoiced work amounts to $75 but the Minimum Price for the Service is $350. In this case, BOSS will again invoice the customer $350.

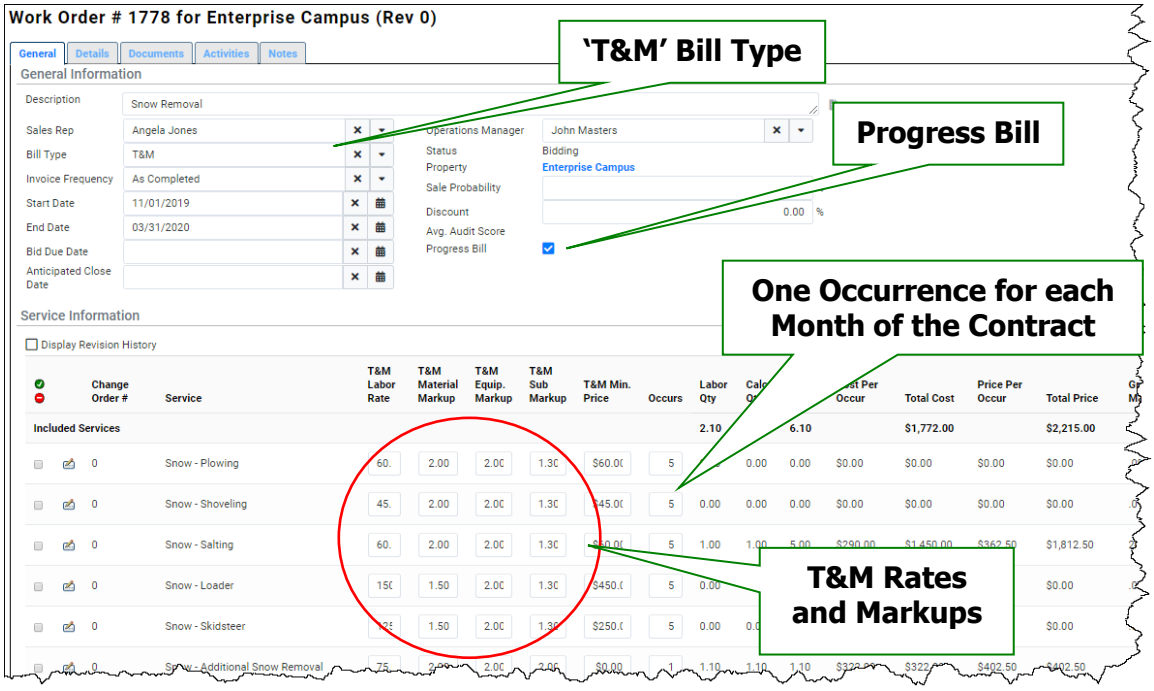
Example – Work Order View

Work Order Set to Invoice for Labor, Material, Equipment, and Subcontractor

This Work Order is configured to charge the customer for Labor, Material, Equipment, and Subcontractor.

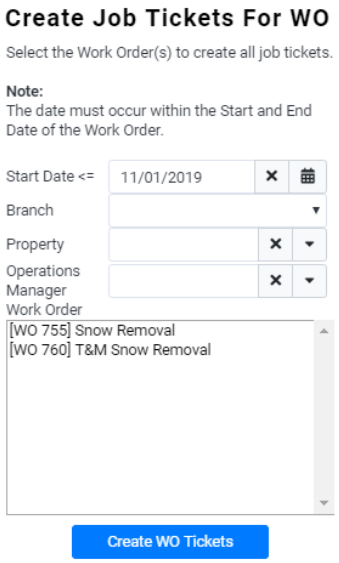
The Services selected for the Work Order are based on the different T&M Services being offered and reflect the different Labor Rates and Material Markup. For this type of bid, there is one 'occurrence' of the Service for each month of the Work Order Term. There

will be one Job Ticket used per month and all time and material worked during the month is placed on the single ticket.



Job Ticket

When the Snow Season starts, Job Tickets for the Work Order will need to be created.



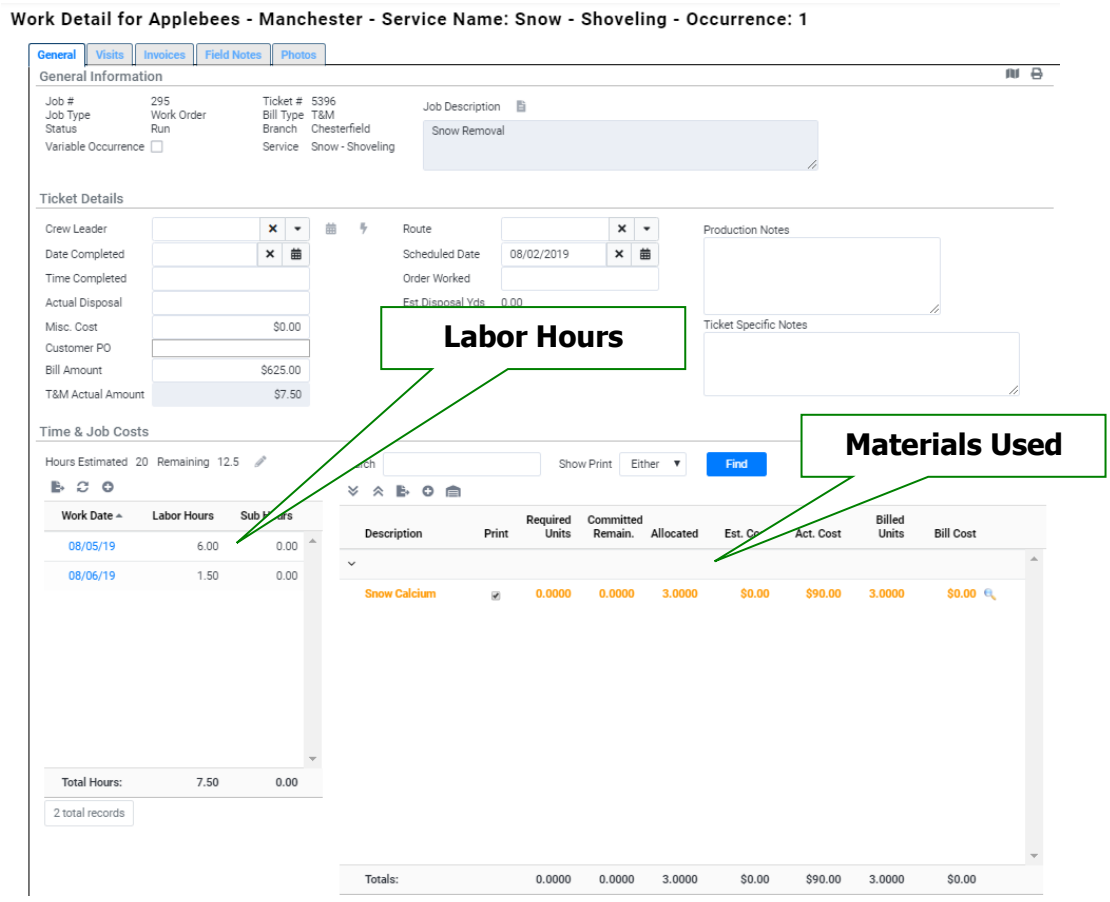
At the start of the Snow Season (and in the term of the Work Order), the Job Ticket(s) for the Work Order are created. Remember that for Work Orders, all Job Tickets are created at one time.

If you plan to use one ticket for each month of the work order term, then remember that ALL Job Tickets have been created since this is a Work Order so be careful that time for a given month is put on the correct Job Ticket. *(More information on ticketing the time and materials can be found in the "Snow Settings and Event Management Reference Guide".)* Throughout the course of the work order, be sure to close the Job Ticket for the previous month by completing and approving. Time for the new month will be reported to the next Job Ticket for the Work Order/Service.

Examples - Ticket View

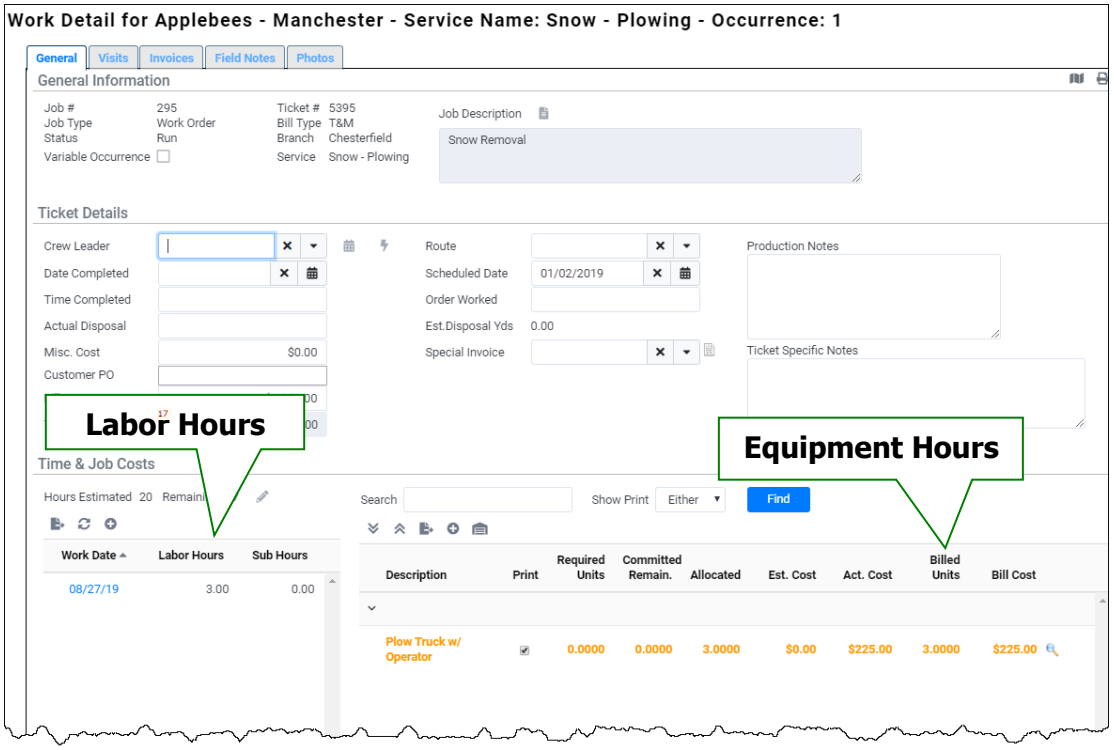
Work Order Set to Invoice for Labor, Material, Equipment, and Subcontractor –

This is an example of a Job Ticket where Time and Material is reported. Each of these will be invoiced according to the Rate and Markups from the Work Order Service or Service Items.



Work Order Set to Invoice for Material, Equipment, and Subcontractor– not Labor

This is an example of a Job Ticket where Time and Material is reported to the Job Ticket but because the Work Order is set up to charge only for Equipment, we see that the Equipment has been allocated and is charged by the hour. There is a corresponding Labor entry on this ticket, and this is used for Job Costing and Payroll so that the costs can be reported, and the employee can be paid. In this example, the Service is set up so that the Labor Rate is zero, meaning the Labor will not be invoiced to the customer since it has been factored into the Equipment.

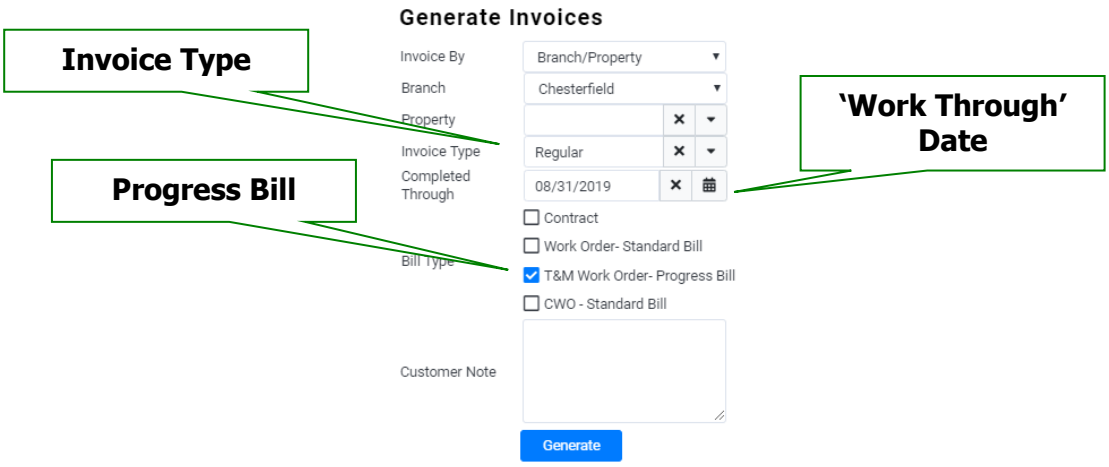


Invoicing

Progress Bill

Progress Bill Time and Material Work Orders can be invoiced at any time regardless of the ticket status. The 'Completed Through' field acts as a 'worked through' field. All un-invoiced Time and Material entered prior to and including the date entered is included on the invoice.

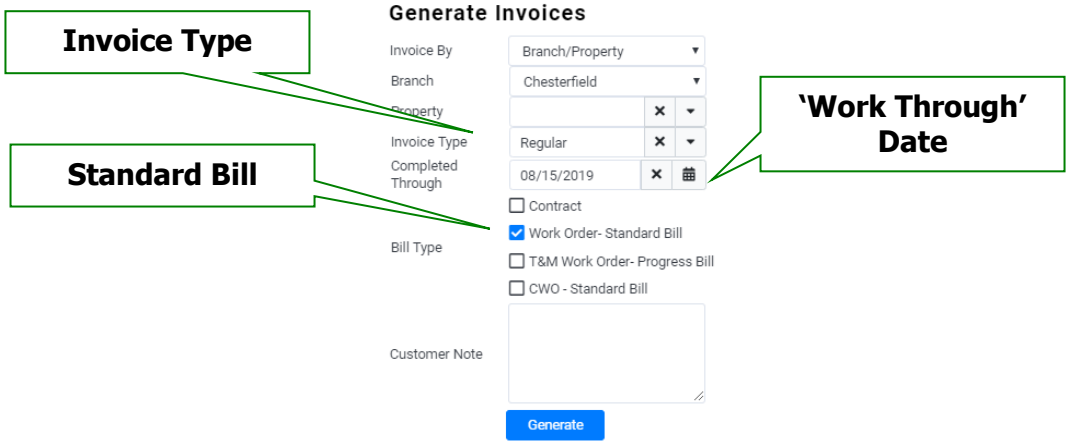
Invoicing for this type of Work Order can be performed at any time – perhaps after each Snow Event.



Standard Work Order

Standard Bill (non-Progress Bill) Time and Material Work Orders can only be invoiced after all Job Tickets for the Work Order have been completed. The Invoice will include the Time and Material (rate and markups) for all tickets with a complete date before the 'Completed Through' date.

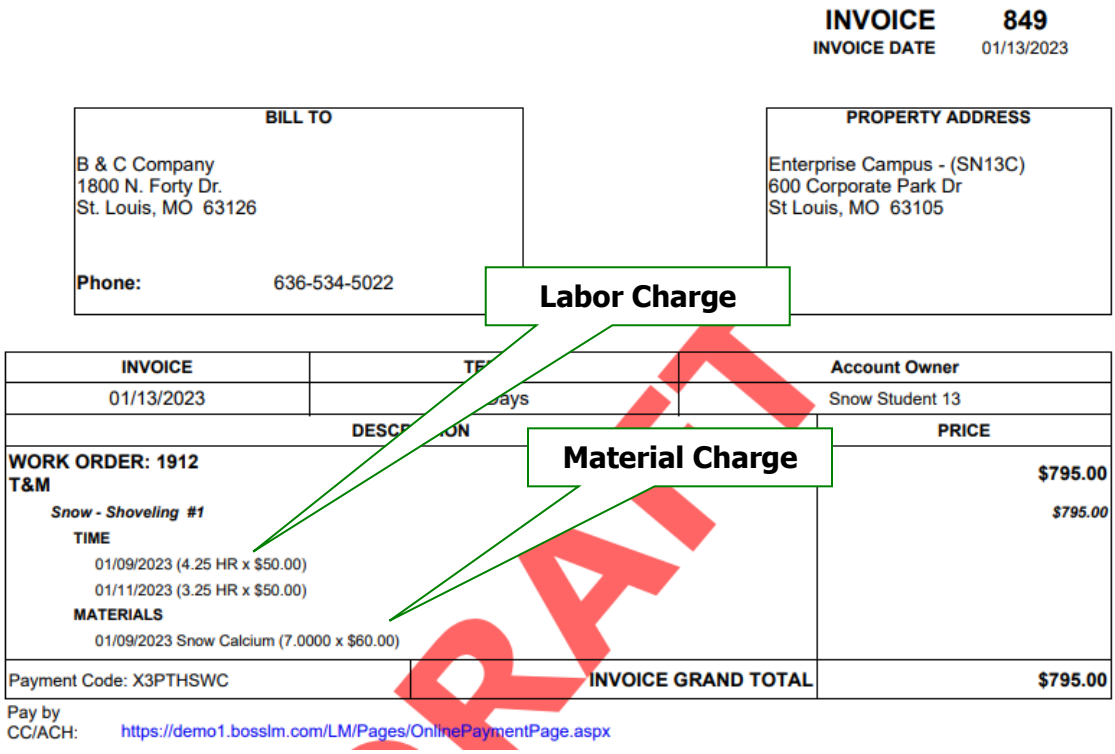
Invoicing for this type of Work Order can be performed at any time after the Job Tickets for the Work Order have been completed – perhaps after each Snow Event.



Examples - Invoice View

Work Order Set to Invoice for Labor, Material, Equipment, and Subcontractor

Below is a sample Invoice that uses Services and Service Items setup to invoice the Labor and Material. Any Labor reported on the Job Ticket is shown and charged at the T&M Labor Rate set for the Service. The Material used for the Job is displayed separately and the cost is marked up according to the markup on the Service or Service Item.



Work Order Set to Invoice for Material, Equipment, and Subcontractor– not Labor

Below is a sample Invoice that uses Services and Service Items setup to invoice based on Equipment use only. In this case, the Equipment Service Items have been marked up to account for the Labor needed to operate the Equipment and the Service has been setup to have a zero dollar Labor Rate. Even though the employee's time has been recorded on the Job Ticket (for Job Costing and Payroll), this type of setup will not show the Labor on the Invoice since the Labor Rate is zero.

INVOICE **850**
INVOICE DATE 01/13/2023

BILL TO	PROPERTY ADDRESS
B & C Company 1800 N. Forty Dr. St. Louis, MO 63126 **Phone:** 636-534-5022	Enterprise Campus - (SN13C) 600 Corporate Park Dr St Louis, MO 63105

Shows Only the Equipment and not the Labor

INVOICE	TERMS	Account Owner
01/13/2023	30 Days	Snow Student 13

DESCRIPTION	PRICE
WORK ORDER: 1913	
T&M Equipment	**$1,225.00**
Snow - Truck w/Plow #1	***$1,225.00***
MATERIALS	
01/09/2023 Plow Truck w/ Operator (7.0000 x $175.00)	

Payment Code: 7RFM7FWD	**INVOICE GRAND TOTAL**	**$1,225.00**

Pay by CC/ACH: https://demo1.bosslm.com/LM/Pages/OnlinePaymentPage.aspx

RAFT

3. Seasonal Contract

To set up and bill seasonal snow contracts that have a fixed, recurring amount over a certain period, a Contract job type will be used and set to a Budget Bill type. This will invoice the agreed upon amount regardless of the number of Snow Events that occur and regardless of the amount of time and material used to complete the job.

Service Catalog Setup

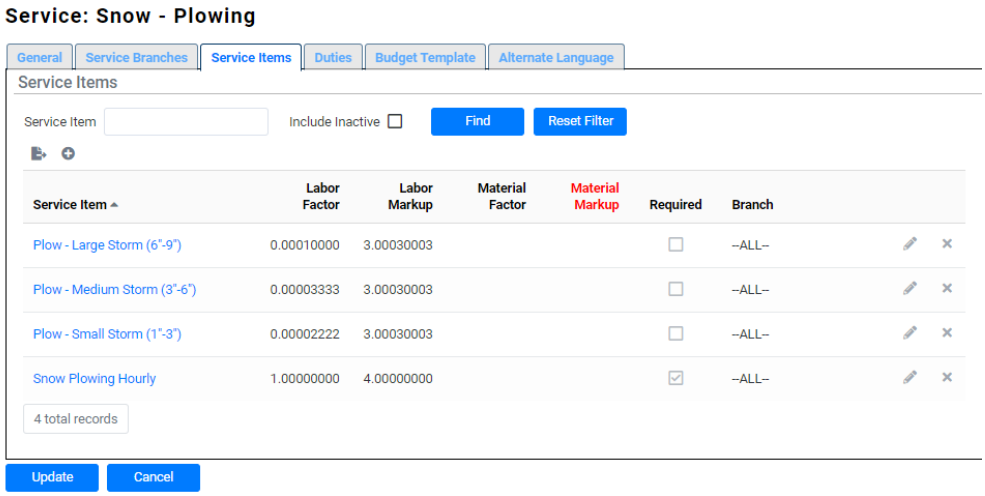
The Services and Service Items used will likely be the same or very similar to the ones used on T&M work orders, but for contracts the Service Items are required to build the estimate.

Services

Your basic snow services are simply used to break down the charges on the bid by category and show the type of work that is to be performed. The seasonal contract will disregard any T&M rates set on the service, and in the bidding process the total to be charged will be estimated and configured with the Service Items.

Service Items

The Service Items for each Service should include all the elements needed to complete that Service. Similarly, to how a maintenance bid is created, you will need the appropriate Service Items that include labor and/or materials, to refine your estimate.

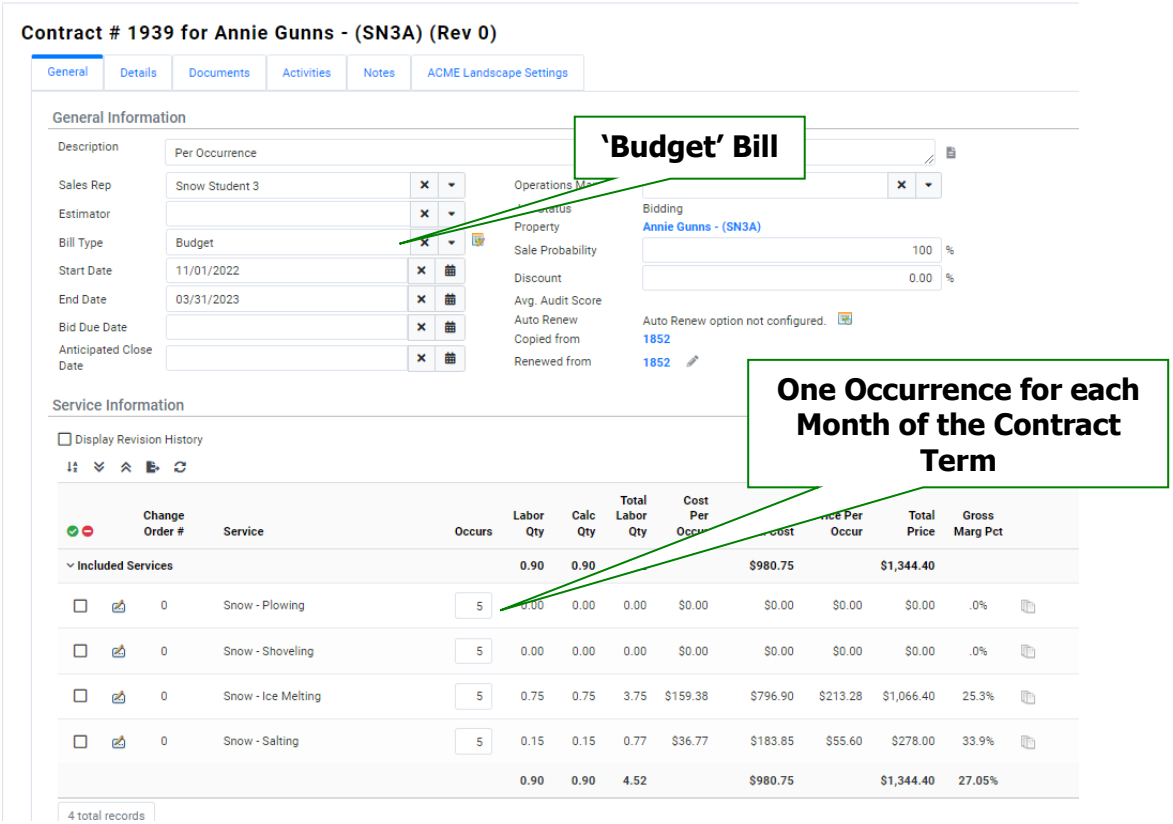


Contract

The Contract will be setup as a Budget Bill type Contract with the start and end dates reflecting the start and end of the typical Snow Season.

The contract should include at least one service for snow removal. There may be more services listed depending on the level of detail required. Since completed tickets

determine when earned revenue is reported you will want to set the number of occurrences to one per month.



The Services selected for the Contract are ones to be estimated by takeoff measurements. There will be one Job Ticket created per month and all time and material worked during the month is placed on the single ticket.

This Contract example shows Services with 5 Occurrences, one occurrence or Job Ticket for each month of the Contract term.

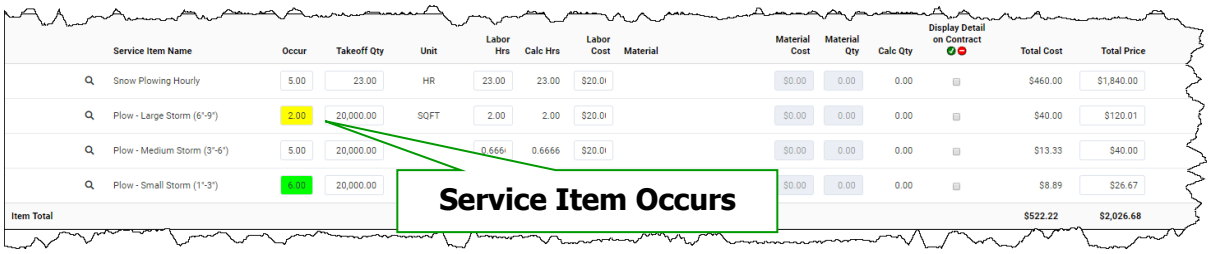
Service Items

Select the Service Items to be included in the Service.

You can perform the service item estimating in one of two ways:

- Monthly Estimate – in this method you would estimate the service items based on the planned hours/materials you expect to have in one month. (Just remember the amount on the service item will be multiplied by the total number of occurrences (months) of the contract. This will then be the total for the seasonal contract.)
- Yearly Estimate – this method uses the 'Allow Service Item Occurs' setting on the Service which allows the number of service item occurrences to be different than the total number of service occurrences. This method allows you to estimate the service items based on the total number of occurrences you expect to have in the year and the planned hours/materials you expect to have in each occurrence.

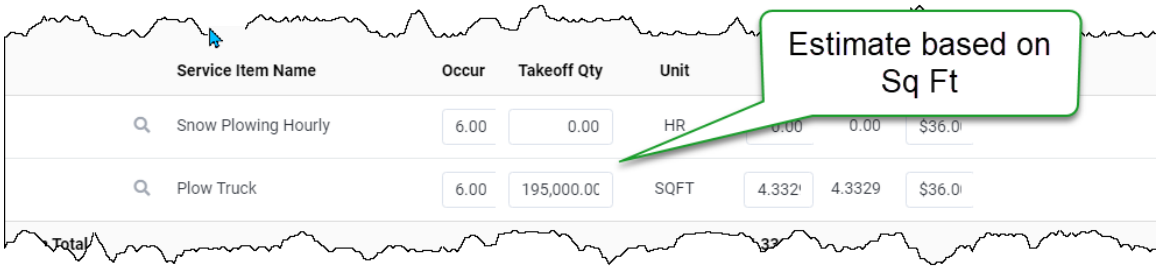
In the below example, the Service has been set to 'Allow Service Item Occurs'.



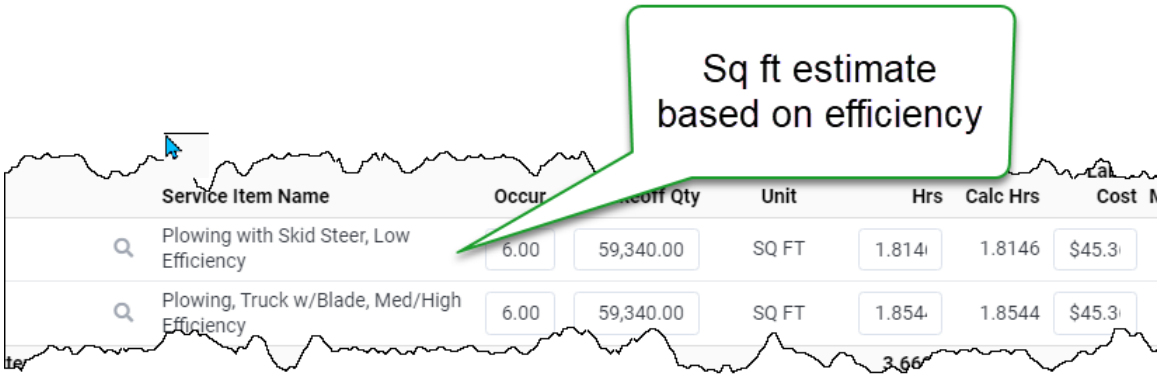
Service Item Name	Occur	Takeoff Qty	Unit	Labor Hrs	Calc Hrs	Labor Cost	Material	Material Cost	Material Qty	Calc Qty	Display Detail on Contract	Total Cost	Total Price
Snow Plowing Hourly	5.00	23.00	HR	23.00	23.00	$20.0		$0.00	0.00	0.00		$460.00	$1,840.00
Plow - Large Storm (6'-9")	2.00	20,000.00	SQFT	2.00	2.00	$20.0		$0.00	0.00	0.00		$40.00	$120.01
Plow - Medium Storm (3"-6")	5.00	20,000.00		0.666	0.6666	$20.0		$0.00	0.00	0.00		$13.33	$40.00
Plow - Small Storm (1"-3")	6.00	20,000.00						$0.00	0.00	0.00		$8.89	$26.67
Item Total												$522.22	$2,026.68

The Service Items for this Service show that the number of occurrences or visits for each of the Service Items differs based on how many small, medium or large storms have historically occurred in a snow season. This indicates that there are 2 anticipated large events, 5 anticipated medium events and 6 anticipated small events during the course of the Contract. An additional 5 plowing hours have been included as well.

Other examples of Service Item set up:



Service Item Name	Occur	Takeoff Qty	Unit			
Snow Plowing Hourly	6.00	0.00	HR	0.00	0.00	$36.0
Plow Truck	6.00	195,000.0(	SQFT	4.332	4.3329	$36.0
Total				33		



Service Item Name	Occur	Takeoff Qty	Unit	Hrs	Calc Hrs	Cost
Plowing with Skid Steer, Low Efficiency	6.00	59,340.00	SQ FT	1.814	1.8146	$45.3
Plowing, Truck w/Blade, Med/High Efficiency	6.00	59,340.00	SQ FT	1.854	1.8544	$45.3
				3.66		

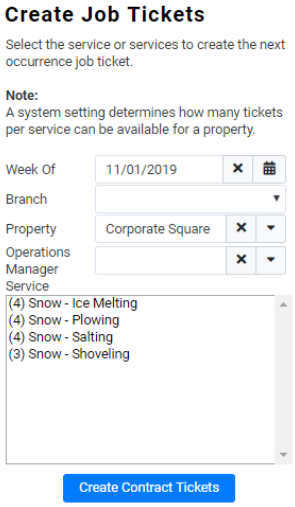
Once the pricing and Service / Service Items are complete, the Contract can be submitted, accepted, and forecast like any other Contract.

Note: If you have a property that has a fixed price contract but also uses T&M components such as salting, a separate Work Order must be created.

Job Ticket

When the Snow Season starts, Job Tickets for the Budget Billed Services will need to be created. This type of Contract is setup to have a single ticket open for the month, so the workflow for these types of Contracts / Job Tickets will be:

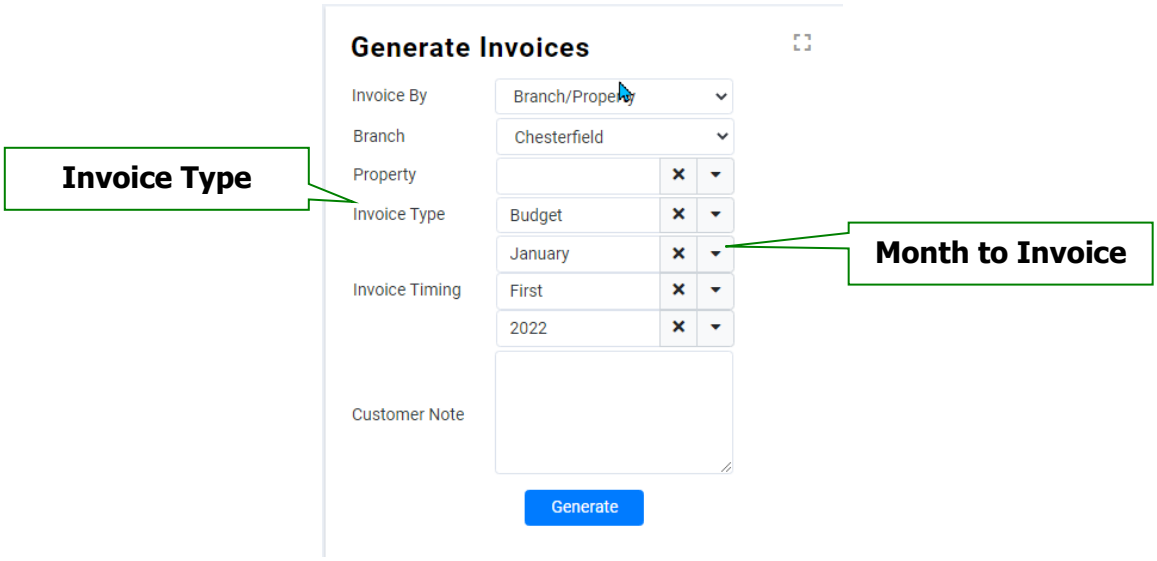
- At the start of each month during the Snow Season and through the term of the Contract, a Job Ticket will be created.
- All Time and Material for the job will be reported to this single ticket during the month. *(More information on ticketing the time and materials can be found in the "Snow Settings and Event Management Reference Guide".)*
- At the end of the month, the Job Ticket for that month will be closed and a new ticket will be created to record Time and Material for the new month.



Invoicing

Since this is a Budget Billed Contract, it can be handled like most maintenance type Contracts in that it is billed once a month, usually at the first of the month.

Note: Budget Billed invoices will always appear on a separate invoice from any other bill types, but depending on settings, Contract Billed and Work Orders can be combined or separated. The options to have charges appear on separate invoices are set on the Customer record.



Invoice View

INVOICE **851**
INVOICE DATE 11/01/2022

BILL TO

Ameristar
123 Main St.
Suite 100
Chesterfield, MO 63005

Phone: 123-456-7890

PROPERTY ADDRESS

nnie Gunns - (SN3A)
6806 Chesterfield Airport Rd
hesterfield, MO 63005

Budget Billed

INVOICE	TERMS	Account Owner
11/01/2022	30 Days	Snow Student 3

DESCRIPTION		PRICE
NOVEMBER BILLING Seasonal Snow Removal		$268.88
Payment Code: 9SZ7S85N	**INVOICE GRAND TOTAL**	**$268.88**

Pay by CC/ACH: https://demo1.bosslm.com/LM/Pages/OnlinePaymentPage.aspx

AFT

4. Per Occurrence Contract

The remaining types of snow contract billing would fall under the category of 'Per Occurrence' contracts. These are set up to bill a fixed amount per Service, when the service is rendered throughout the period of the contract. This type of agreement in BOSS will use the Contract job type and the Contract bill type.

Each time a Job Ticket is completed for a particular Service, this fixed amount for the Service is invoiced. In the case of multiple events, visits, or occurrences, each of these occurrences is invoiced at the agreed amount. Invoicing for these types of Contracts is not based on Time and Material used to complete the occurrence.

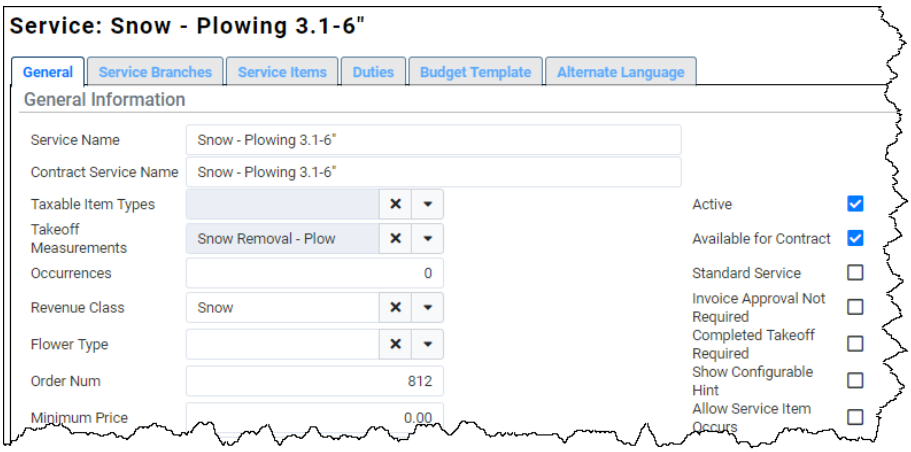
Service Catalog Setup

The types of Services used on this type of Contract could be very similar to the Services used on T&M and Seasonal bids, but often there will be additional Services and Service Items needed for more specific billing situations.

Services

The Service should be set up to account for the different production factors due to differences in snow depth or severity. As an example, there might be Services for:

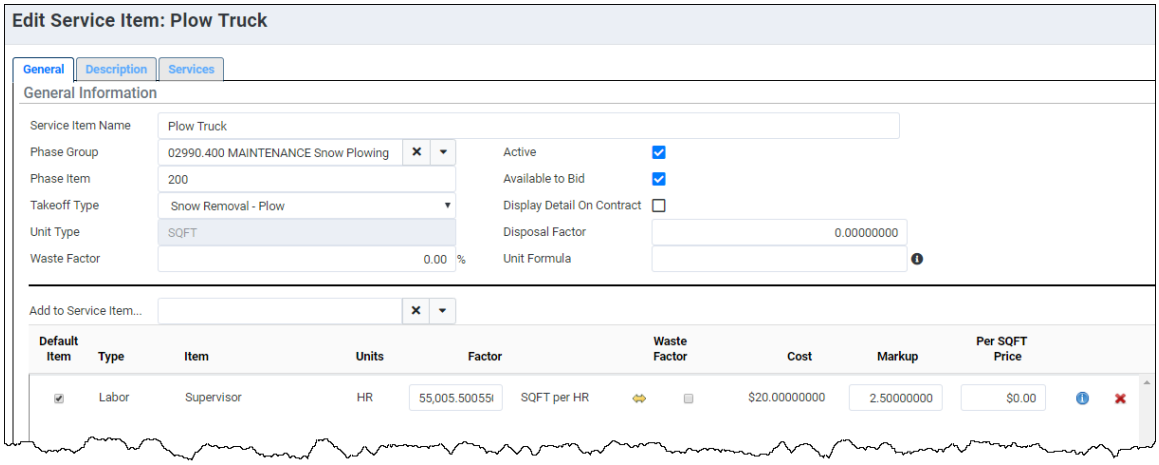
- Snow Plowing 0" – 3"
- Snow Plowing 3.1" – 6"
- Snow Shoveling 0" – 4"
- Snow Shoveling 4.1" – 7"
- Salting (Light or Partial)
- Salting (Heavy or Complete)
- Snow Plow (1 Push)



Service Items

Service Items for these Services should be set up to include the specific factors that would be used to accomplish the corresponding Service.

This could optionally include equipment if it is tracked and will be logged separately from labor. Otherwise, the equipment value should be included in the Labor Markup of the Service Item.

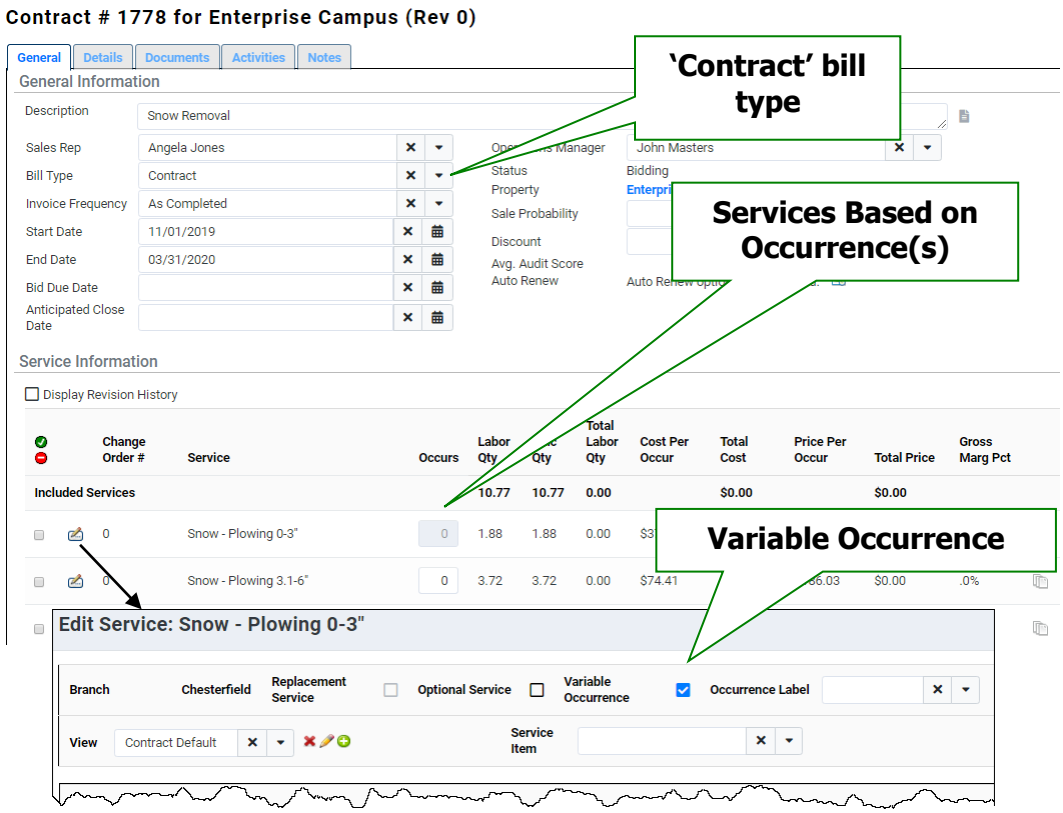


Contract

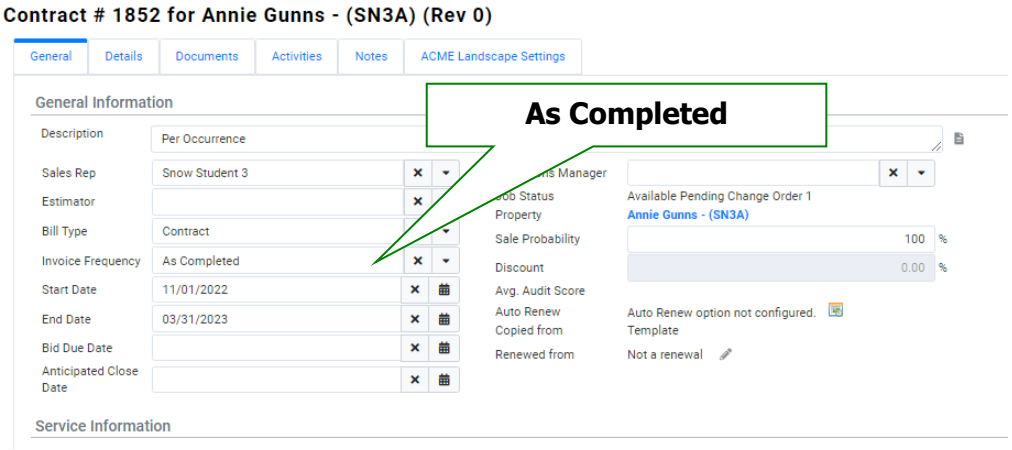
The Contract will be setup as a Contract Bill type with the start and end dates reflecting the start and end of the typical Snow Season. The Services that are included on the Contract will be based on snow depth, visit or severity and should be set to 'Variable Occurrence'.

The Variable Occurrence feature allows the service to have an unlimited number of occurrences and in turn an unlimited number of tickets. This will also allow you to have more than one ticket for the same job and service in the same week. Though the Job screen will show zero Occurrences, until the job is completed, or the end date has passed, there will always be another ticket that can be generated.

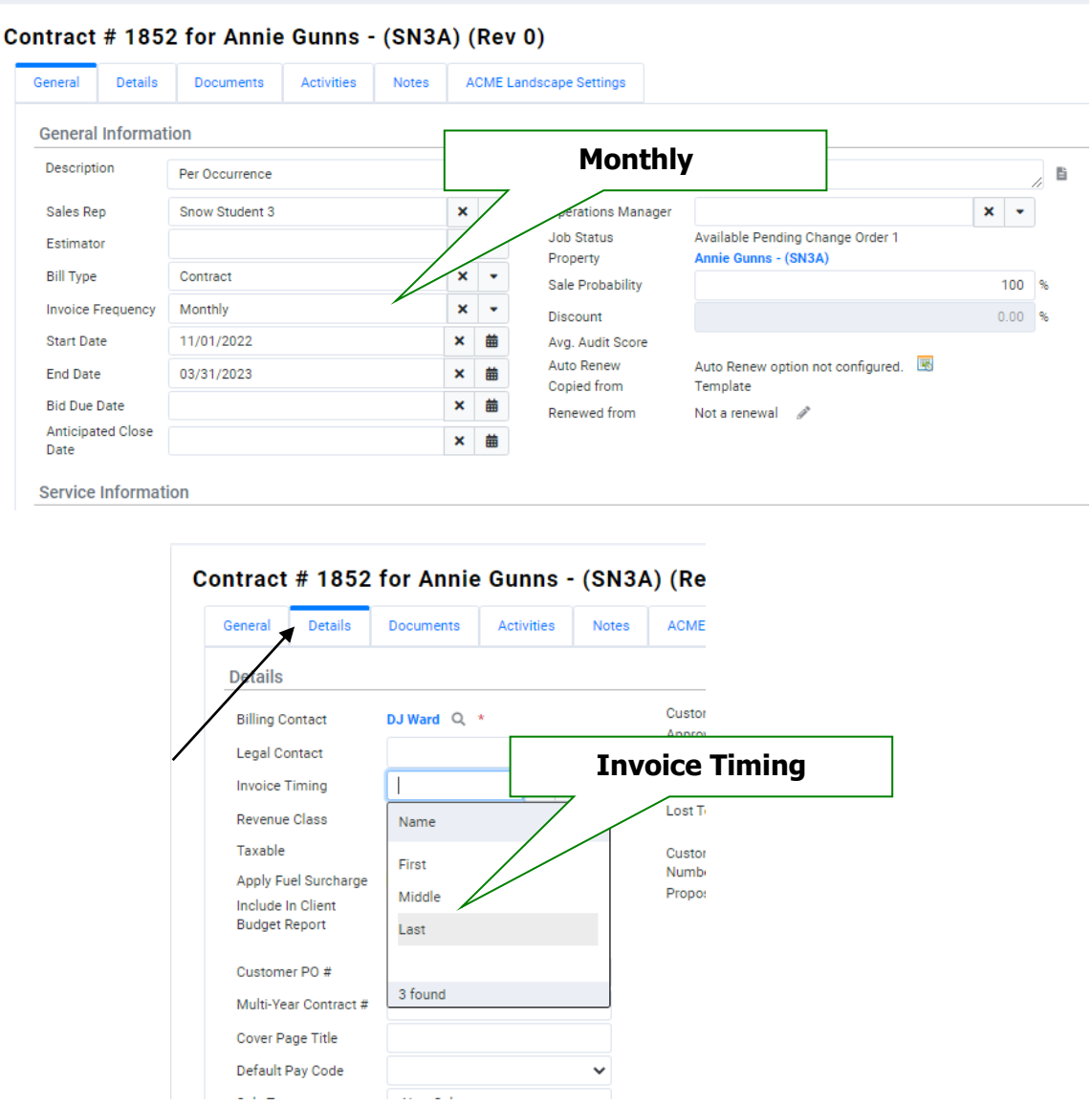
Note: in order for the system to recognize that the Service should have unlimited occurrences/tickets, the variable checkbox on the Service has to be enabled. Manually entering a zero value in the occurrences field will not have the intended effect.



In addition to Bill Type, the Invoice Frequency will affect how this Per Occurrence Contract will be billed. The first option is "As Completed," which simply means once work has been done you can invoice for that work.



The second choice is "Monthly." This selection will allow only one invoice per month which will include all tickets/jobs which are eligible to be billed through the billing date. If "Monthly" invoice frequency is selected, the field "Invoice Timing" will appear in the details tab of the contract. Options for this field are First (1st), Middle (15th) and Last (last day of month). When the dropdown is left blank, First of month is used by default. This means that a series of per occurrence snow events can be combined onto one monthly invoice.



The Service Items are configured like a standard Contract – the Takeoff Quantities are entered so that the hours, material, and pricing can be set for the Service. The difference for this type of Contract and Service is that it is set to be a 'Variable Occurrence' Service.

Variable Occurrence Services are used when it is unknown how many occurrences there will be for the Service but a price per occurrence is established in the Contract and this is what the Customer agrees to pay for each occurrence of the Service. This established price is what is invoiced regardless of how much time and material was actually used.

Below is an example of how this will appear on the printed Contract though it can be modified to some extent in the Report Designer. The Contract indicates that there is no set number of occurrences, but each occurrence of a Service has a fixed price.

SEASONAL SERVICES	OCCURS	COST EACH
SNOW - PLOWING 0-3"	Seasonal	$48.00
SNOW - PLOWING 3.1-6"	Seasonal	$78.30
SNOW - PLOWING 6.1-9"	Seasonal	$105.30
SNOW - PLOWING 9.1-12"	Seasonal	$159.30
SNOW - PLOWING 12"+	Seasonal	$189.00
SNOW - SHOVELING 0-3"	Seasonal	$281.25
SNOW - SHOVELING 3.1-6"	Seasonal	$351.56
SNOW - SHOVELING 6.1-9"	Seasonal	$444.38
SNOW - SHOVELING 9.1-12"	Seasonal	$561.94
SNOW - SHOVELING 12"+	Seasonal	$1,099.24
SNOW - ICE MELTING	Seasonal	$213.28
SNOW - SALTING	Seasonal	$55.60

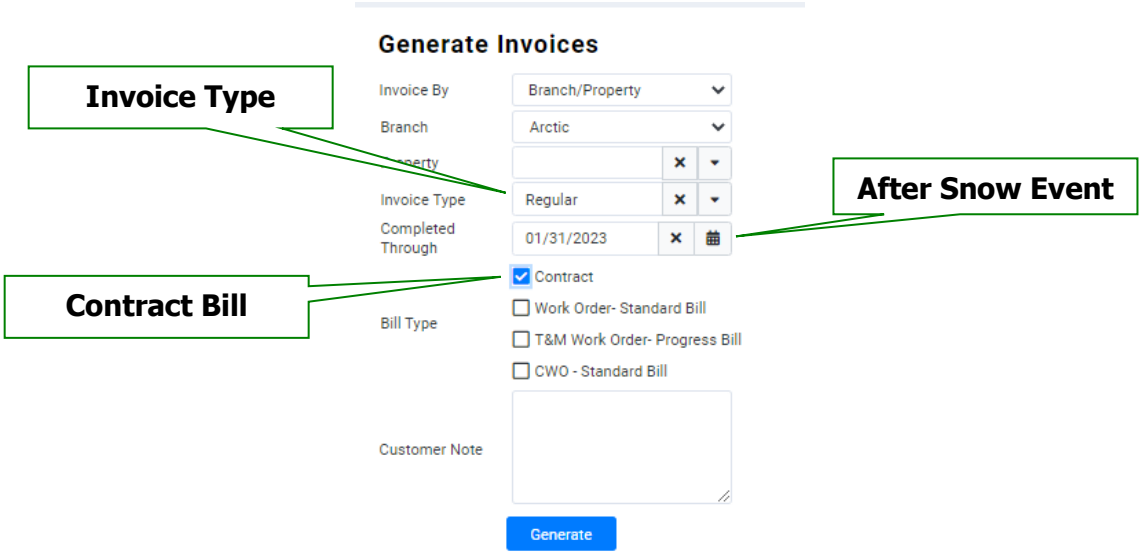
Job Ticket

Since these are 'Variable Occurrence' Services, there will always be tickets available for the Service during the term of the Contract.

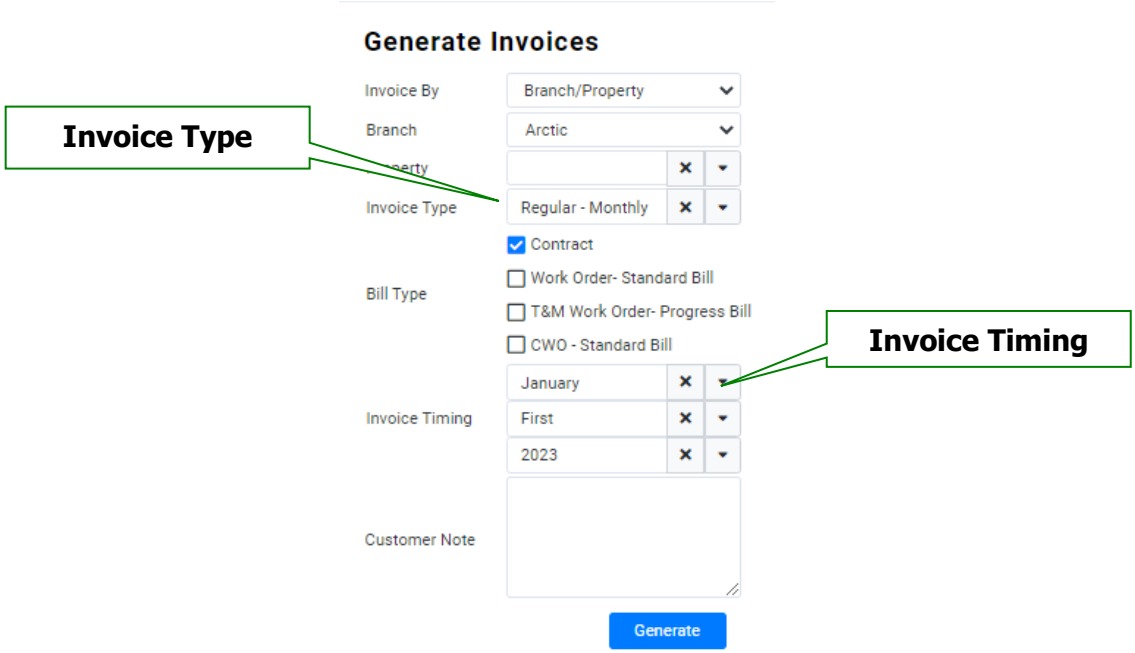
After a Snow Event occurs, the ticket(s) appropriate for the occurrence, depth or severity would be created. All the time and materials used will be reported to the ticket. *(More information on ticketing the time and materials can be found in the "Snow Settings and Event Management Reference Guide".)* Once the information is done being entered, the Job Ticket is Completed and Approved so that it is available for invoicing.

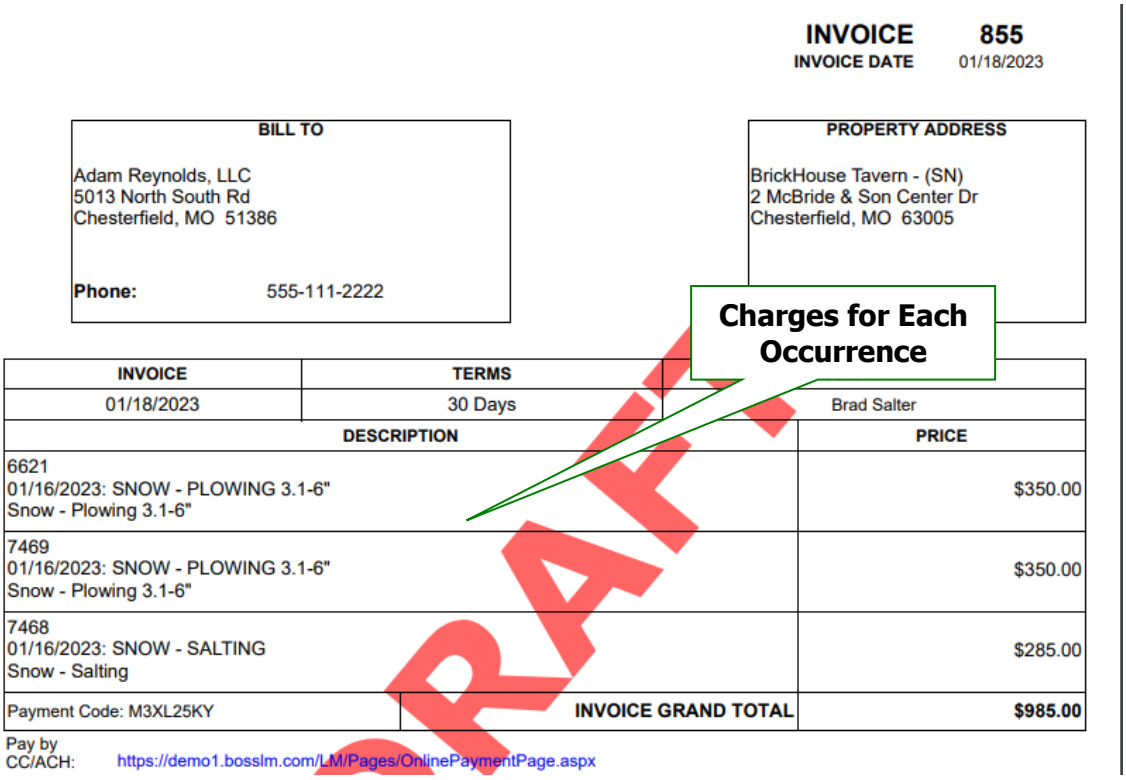
Invoicing

The Invoices for this type of Contract will include all un-invoiced Job Tickets that have been Completed and Approved through the 'Completed Through' date. Invoices for this type of Contract could be created monthly or after each Snow Event.



If the Invoice Frequency of "Monthly" was chosen, then these would be invoiced by selecting the "Regular – Monthly" option and the month for which you are invoicing.





5. Subcontractors – Flat Fee/Quote

In many companies it is common practice to utilize subcontractors during the snow season.

The assumption is that you are receiving a quote from a subcontractor for a property (or you have a pre-arranged flat fee), this amount is included on a bid with the appropriate markup. When the client accepts your contract, you award the subcontractor that work. The Subcontractor manages all aspects of the job and sends you a bill upon completion.

This section does NOT cover using hourly subcontractors. Refer to the Hourly Subcontractors Reference Guide.

There are two methods of setting up Subcontractor tracking in your service catalog – generalized or specific.

Service Catalog Setup - Generalized

A Generalized setup of subcontractors is very simple.

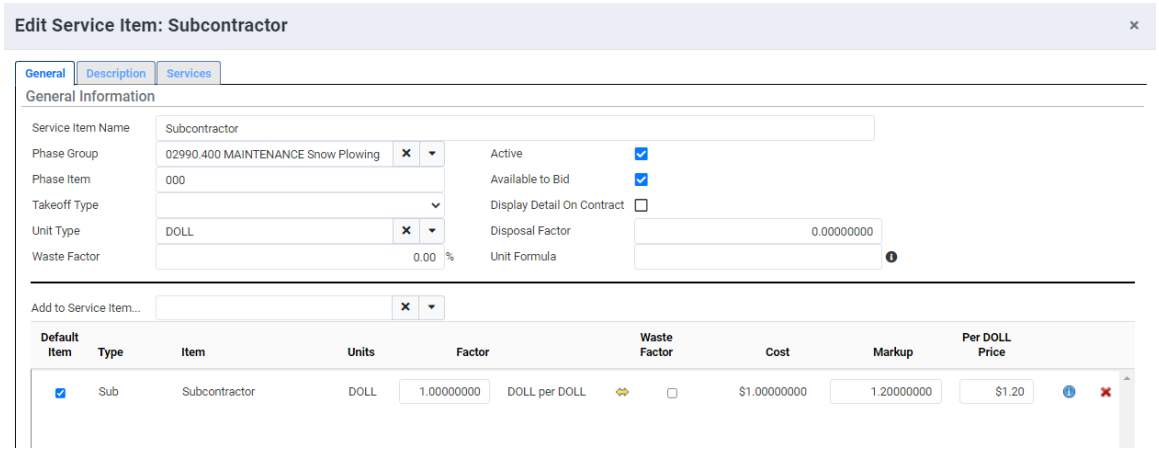
Services

Existing snow services are utilized, and the Subcontractor service item is added to each service.

Service Items

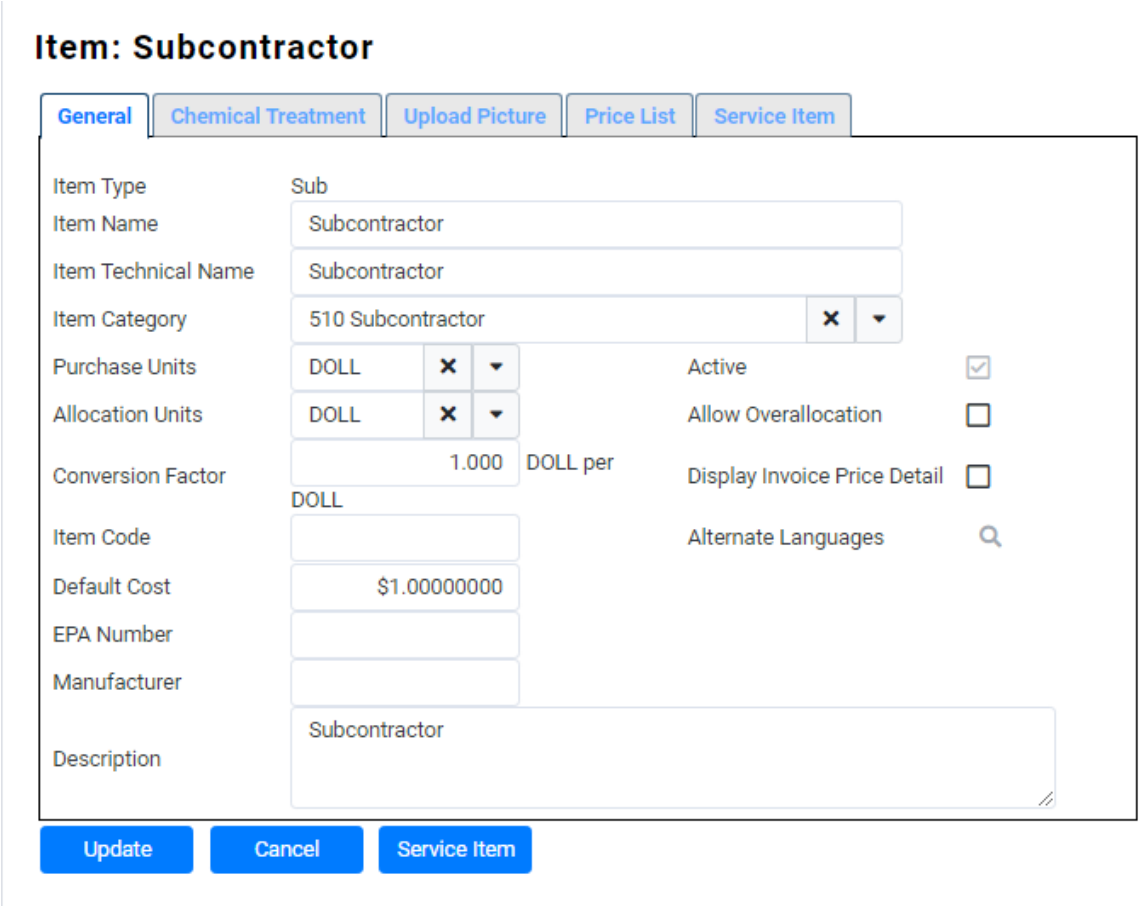
The Service Item is generically named 'Subcontractor'. This Service item can be used for many different subcontractor types (snow, irrigation, pools, etc.) and can be added to many different services.

The service item for a Subcontractor should include the markup so that your per unit price reflects your markup on top of the subcontractor's quoted price.



Items

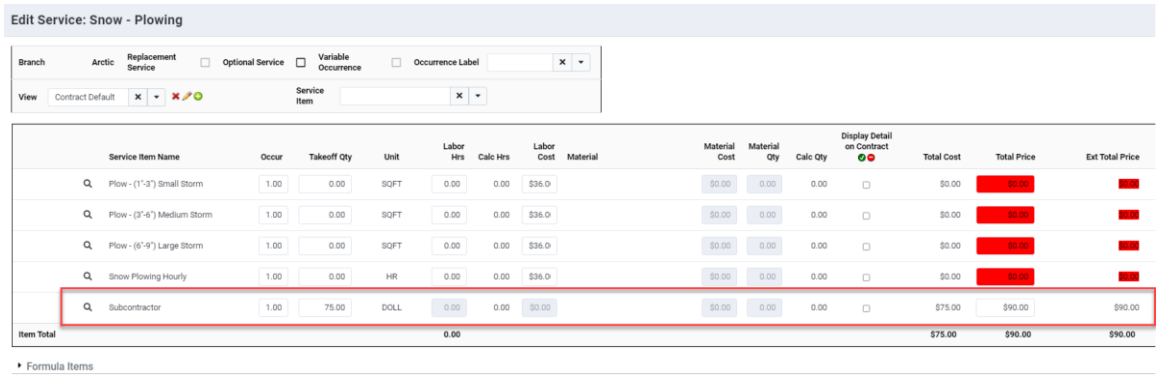
'Subcontractor' is also the generalized name of the Item. This is the name that will appear on the Purchase Order. The purchase and allocation units are in dollars and the item cost is typically one dollar.



Contract

The Contract will be set up by selecting the appropriate service. The details of the start and end dates and number of occurrences should follow the standards noted above based on the type of job.

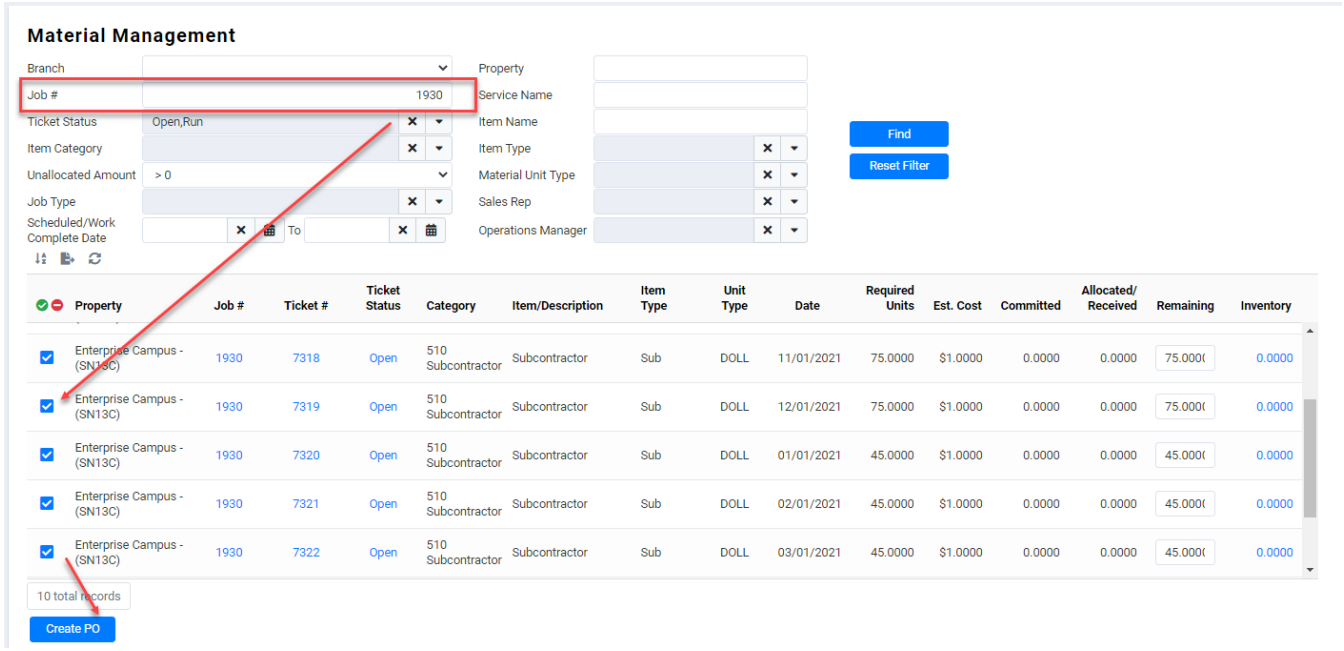
When selecting a service item to estimate, the user should select the Subcontractor service item, entering the quoted dollar value in the takeoff quantity field. Based on the service item setup, the system will calculate the quoted dollar value x the cost ($1.00) x the markup (1.2 in this example) to determine the price charged to the client.

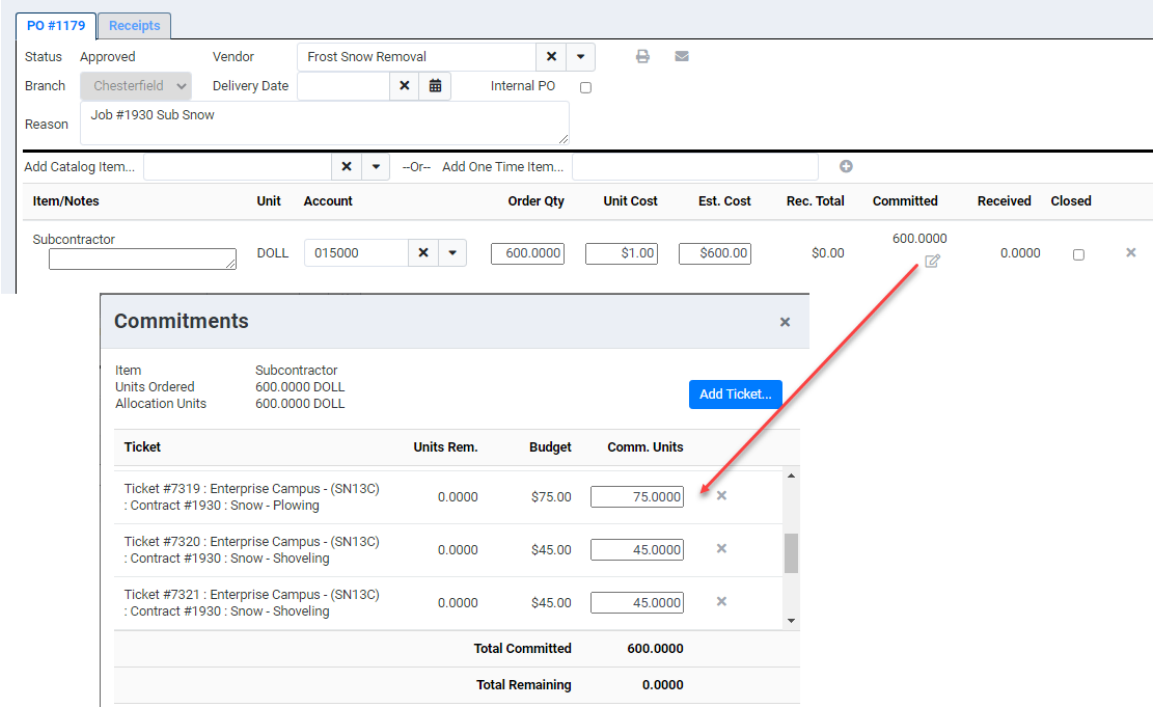


Purchase Order

After the client has accepted the job, the Subcontractor needs to be notified that they have been awarded the work. This can be done through Material Management and a Purchase Order.

Filter the data in Material Management by Job number. Select the Subcontractor items and Create PO.

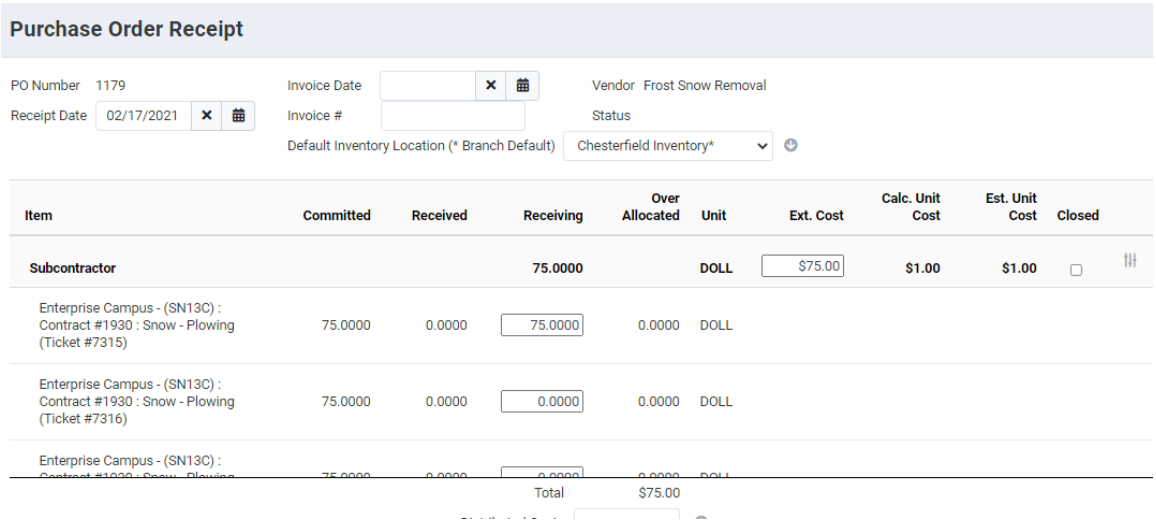




All the generalized Subcontractor items will roll up into a single line with a total dollar value for all services assigned to that Subcontractor. Within the Committed icon each ticket will be shown with an individual value depending on the service.

Fill in all appropriate information on the Purchase order and print/send to the Subcontractor.

Once a service has been performed, the Subcontractor sends an invoice. That invoice is received against the PO. The amount is automatically allocated to the job ticket based on the commitment.



Job Ticket

The final step in the Subcontractor process is to generate and complete the ticket, approving as needed so that it is eligible for invoicing.

Note: depending on how the job was set up, ticket completion may not occur until the end of the month or the season. Refer to each job type above for details.

Service Catalog Setup - Specific

A specified set up of Subcontractors in the service catalog allows for greater detail throughout the process.

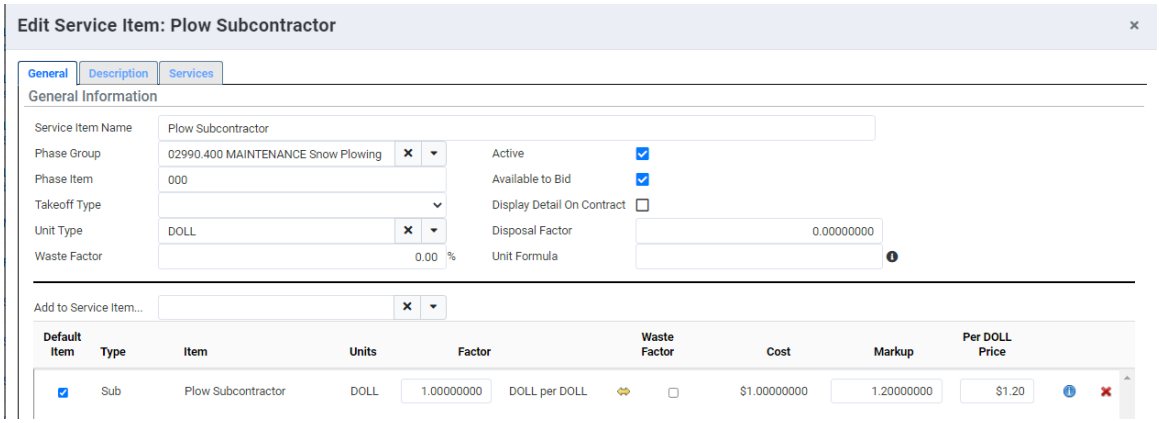
Services

Existing snow services are utilized, and specific Subcontractor service items are added to each service.

Service Items

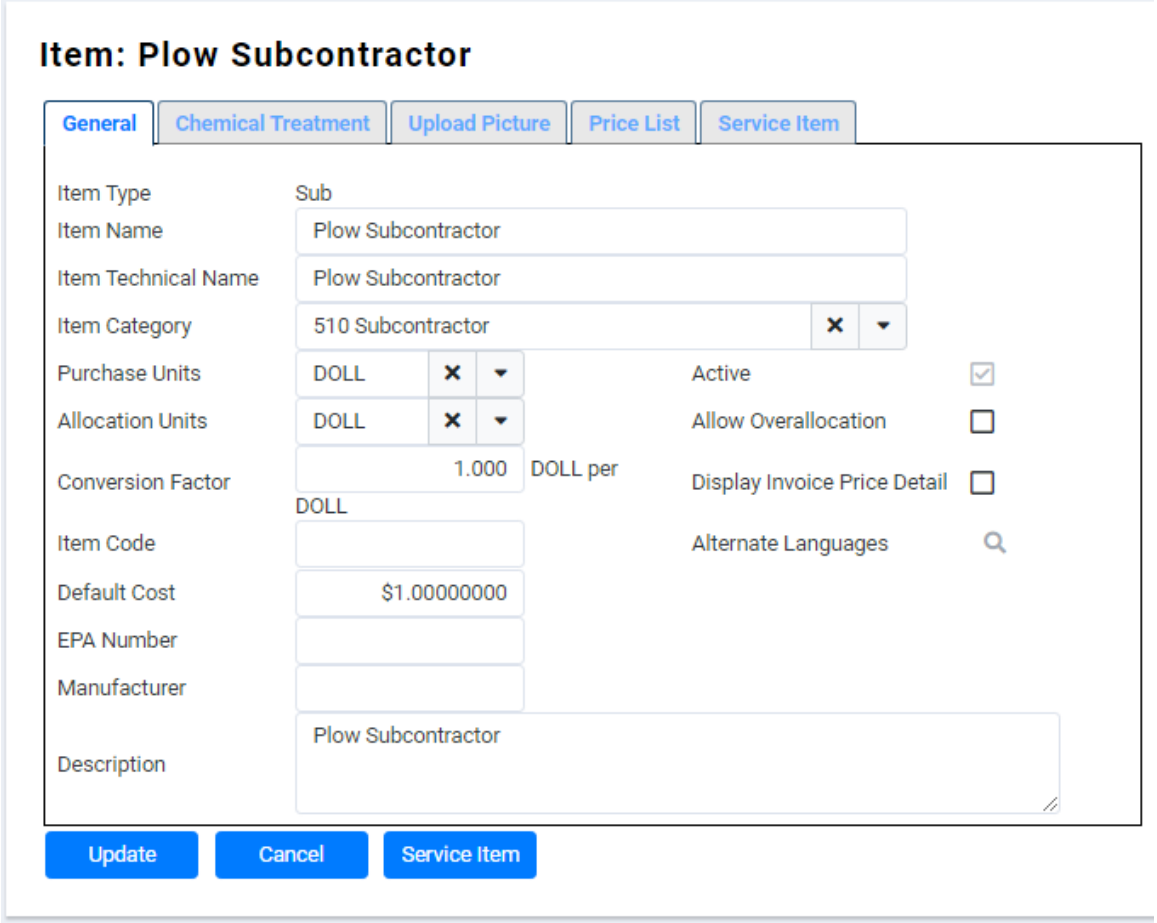
A Service Item is created for each type of Subcontractor work. For example, you may have a Plow Subcontractor, Shovel Subcontractor, Salt Subcontractor, Ice Melt Subcontractor etc. Each Service Item is then assigned to the appropriate service.

The service item should include the markup so that your per unit price reflects your markup on top of the subcontractors quoted price.



Items

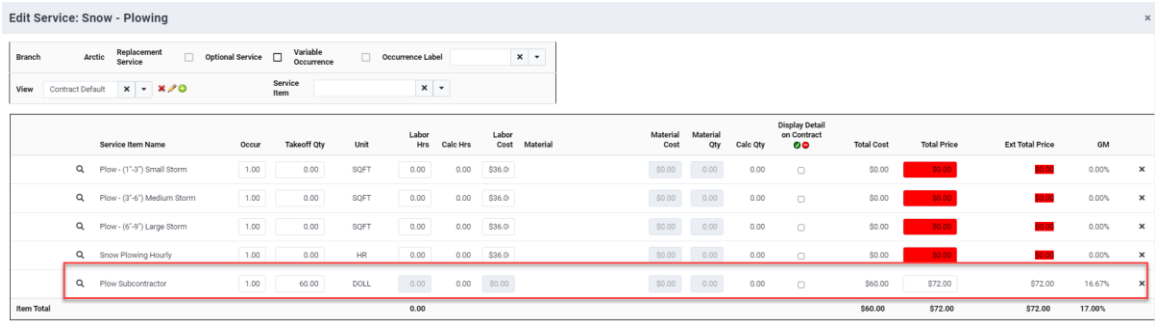
The Item name should be the same as the Service Item name. This is the name that will appear on the Purchase Order. The purchase and allocation units are in dollars and the item cost is typically one dollar.



Contract

The Contract will be set up by selecting the appropriate service. The details of the start and end dates and number of occurrences should follow the standards noted above based on the type of job.

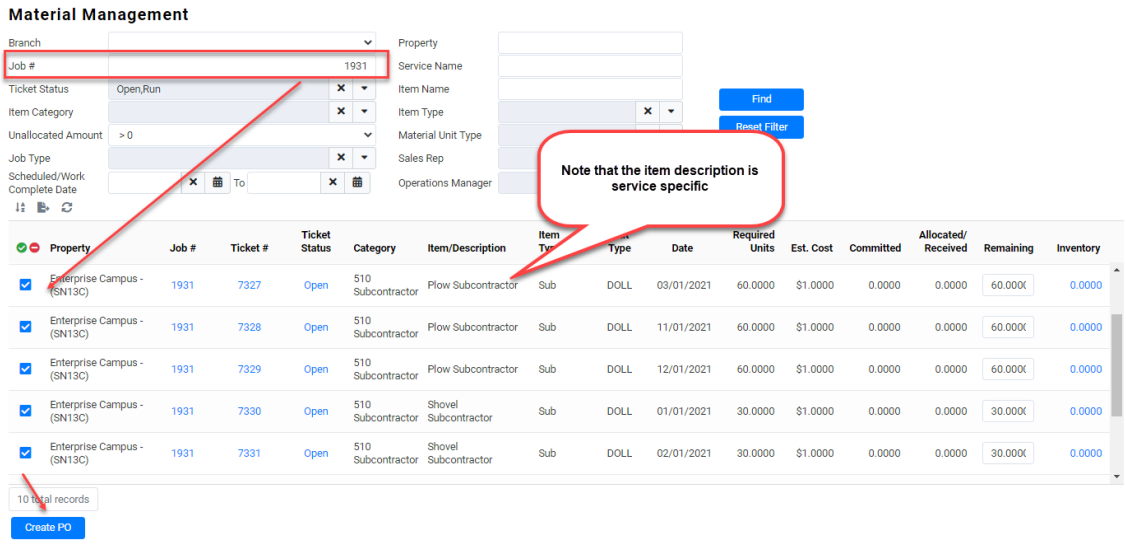
When selecting a service item to estimate, the user should select the specific Subcontractor service item, entering the quoted dollar value in the takeoff quantity field.

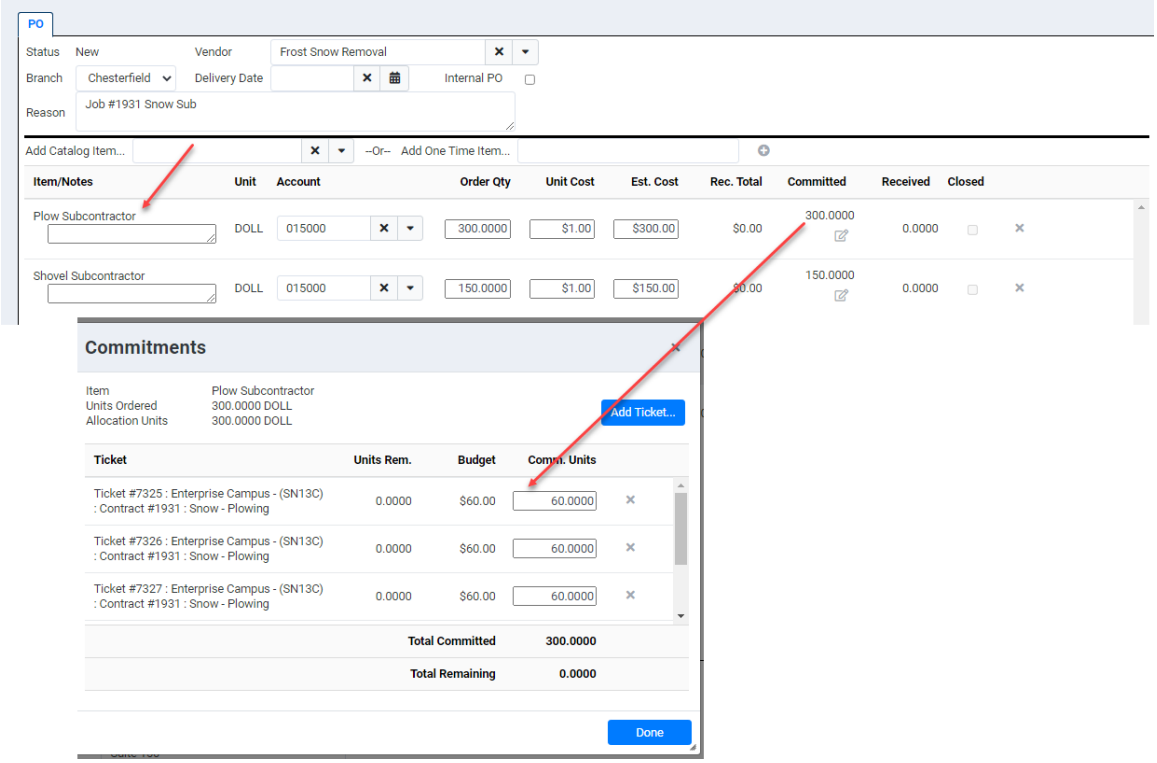


Purchase Order

After the client has accepted the job, the Subcontractor needs to be notified that they have been awarded the work. This is done through Materials Management and a Purchase Order.

Filter the data in Materials Management by Job number. Select the Subcontractor items and Create PO.

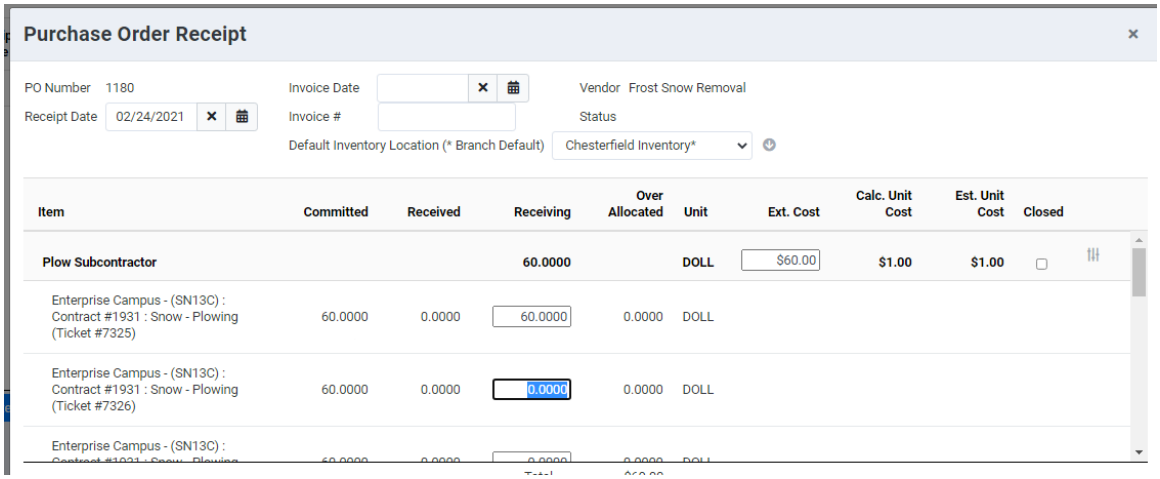




Each Item will roll up into an item specific line on the purchase order. Within the Committed icon each ticket will be shown with an individual value for that specific item.

Fill in all appropriate information on the Purchase order and print/send to the Subcontractor.

Once a service has been performed, the Subcontractor sends an invoice. That invoice is received against the PO. The amount is automatically allocated to the job ticket based on the commitment. The PO Receipt is then Approved for Payment and sent to the accounting system, where a check can be created to pay the Subcontractor.



Job Ticket

The final step in the Subcontractor process is to generate and complete the ticket, approving as needed so that it is eligible for invoicing.

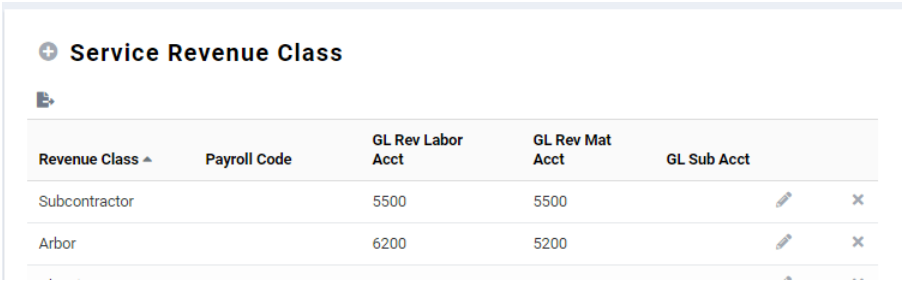
Note: depending on how the job was set up, ticket completion may not occur until the end of the month or the season. Refer to each job type above for details.

Services Catalog Set up – Track Subcontractor Revenue Separately

If Subcontractor Revenue needs to be tracked to a separate GL Account, you will need to set up Services that are in some way noted to be used only for Subcontracted jobs.

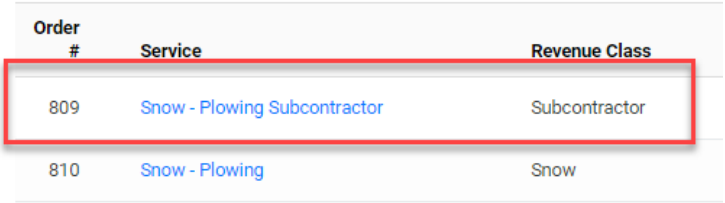
Service Revenue Class

In the Catalog Lists Tab on the Service Revenue Class Module, create the Service Revenue Class (if it does not already exist). Assign the appropriate GL account numbers.



Services

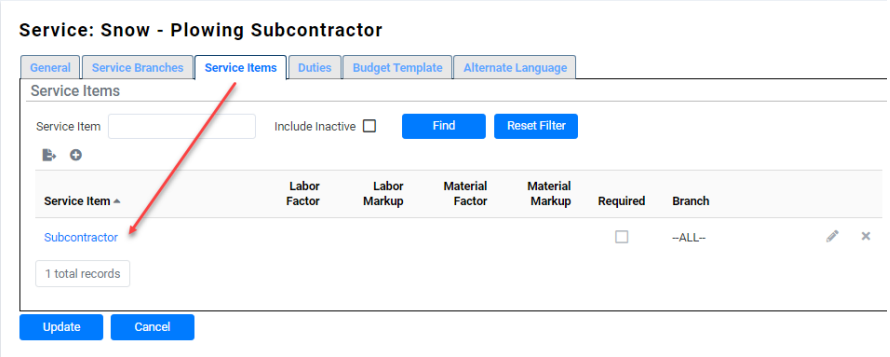
Create new services with a consistent naming standard indicating to all users that this is a subcontractor specific service. Assign this service to the new Service Revenue Class.



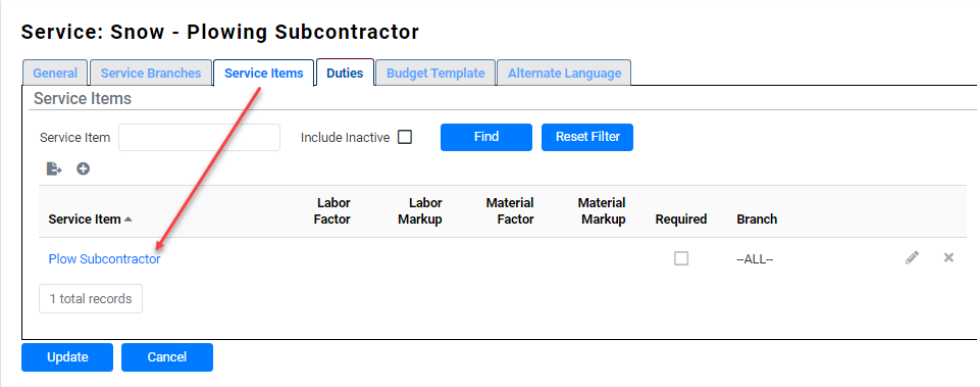
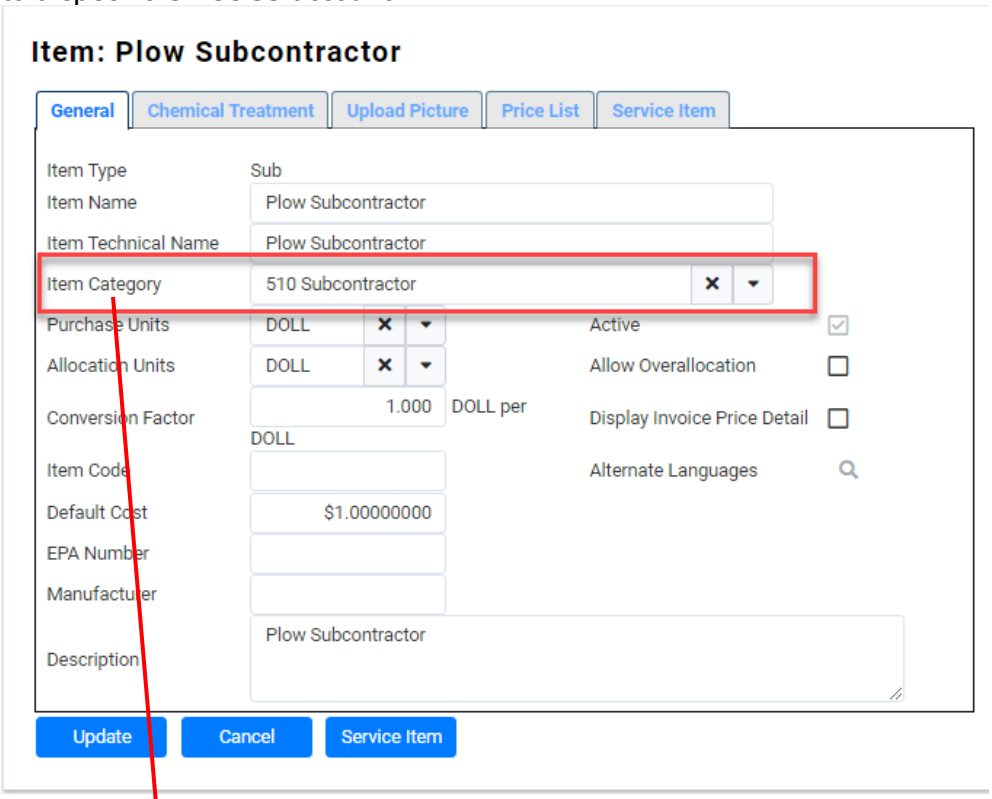
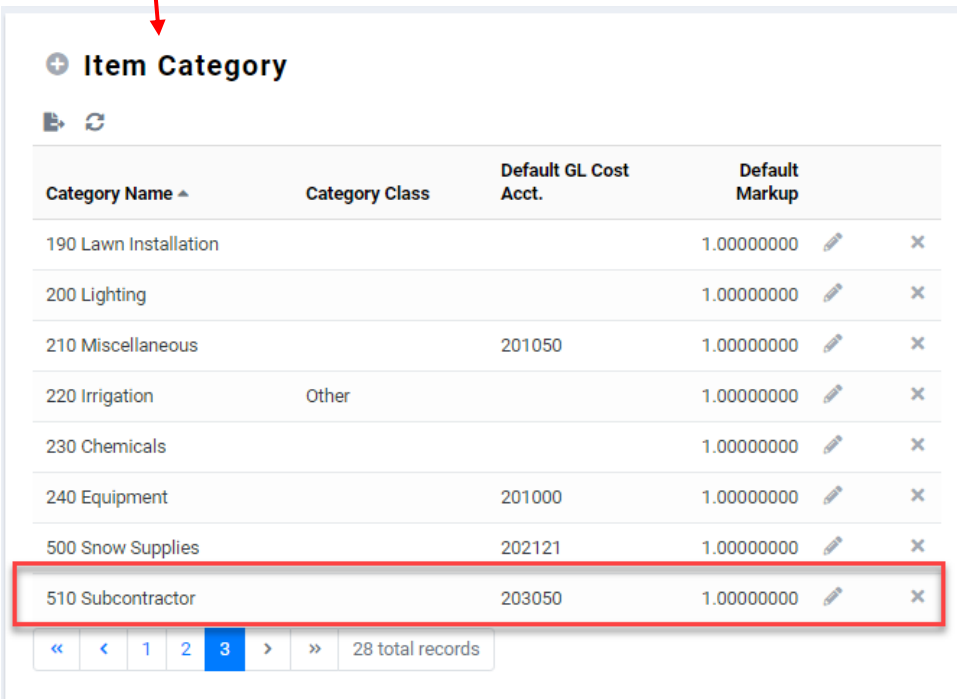
Service Items

Assign the appropriate service items to the service.

Generalized:


Service: Snow - Plowing Subcontractor
General
Service Branches
Service Items
Duties
Budget Template
Alternate Language
Service Items
Service Item
Include Inactive
Find
Reset Filter
Service Item
Labor Factor
Labor Markup
Material Factor
Material Markup
Required
Branch
Subcontractor
--ALL--
1 total records
Update
Cancel

Specific:


Service: Snow - Plowing Subcontractor
General
Service Branches
Service Items
Duties
Budget Template
Alternate Language
Service Items
Service Item
Include Inactive
Find
Reset Filter
Service Item
Labor Factor
Labor Markup
Material Factor
Material Markup
Required
Branch
Plow Subcontractor
--ALL--
1 total records
Update
Cancel

Note: Depending on how your Item is set up, the Subcontractor expense can be tracked to a specific GL COGS account.