

BOSS

Snow — Catalog & Job Set up

Version 9.12



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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: Snow - Plowing

General	Service Branches	Service Items	Duties	Budget Template	Alternate Language
General Information					
Service Name	Snow - Plowing				
Contract Service Name	Snow - Plowing				
Taxable Item Types	<input type="checkbox"/> x <input type="checkbox"/>				
Takeoff Measurements	Snow Removal - Plow <input type="checkbox"/> x <input type="checkbox"/>				
Occurrences	1				
Revenue Class	Snow <input type="checkbox"/> x <input type="checkbox"/>				
Flower Type	<input type="checkbox"/> x <input type="checkbox"/>				
Order Num	810				
Minimum Price	0.00				
T&M Labor Rate	75.00				
T&M Material Markup	2.00				
T&M Equipment Markup	1.50				
T&M Sub Markup	1.20				
Reduce Estimated Hours (%)	0.0000 (For a 10% reduction, enter .1000)				
Configurable Hint					
Description					
Active	<input checked="" type="checkbox"/>				
Available for Contract	<input checked="" type="checkbox"/>				
Standard Service	<input type="checkbox"/>				
Invoice Approval Not	<input type="checkbox"/>				
Req	<input type="checkbox"/>				
Com	<input type="checkbox"/>				
Req	<input type="checkbox"/>				
Sho	<input type="checkbox"/>				
Hint	<input type="checkbox"/>				
Allow E	<input type="checkbox"/>				
Securs	<input type="checkbox"/>				
Bid Text	<input type="checkbox"/>				

T&M Labor Rate and Markups

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.

Edit Service: Snow - Ice Melting

Branch Arctic Optional Service Occurrence Label x

View Contract Default x x x Service Item

Service Item is Included

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	Ext Total Price	GM
Snow Calcium (BAG)	1.00	0.00	BAG	0.00	0.00	\$25.00	Snow Calcium	\$30.00	0.00	0.00	<input type="checkbox"/>	\$0.00	\$5.00	\$0.00	0.00%
Item Total												0.00	\$0.00	\$0.00	0.00%
Formula Items															
Grand Total												0.00	\$0.00	\$0.00	0.00%

Edit Service: Snow - Ice Melting

Branch Arctic Optional S

View Contract Default x x x

Service Item Name

Snow Calcium (BAG)

Item Total

Formula Items

Grand Total

Cost and Markup used for Invoicing

Edit Job Service Item: Snow Calcium (BAG)

General Notes

General Information

Service Item Name Snow Calcium (BAG)

Takeoff Qty 0.00000000 Unit Type BAG

Waste Factor 0.00 %

Add to Service Item...

Default Item	Type	Item	Calc. Qty	Qty	Units	Factor	Waste Factor	Cost	Markup	Price
<input checked="" type="checkbox"/>	Labor	Snow Labor	0.0000	0.0000	HR	0.16000000 HR per BAG	<input checked="" type="checkbox"/>	\$25.00000000	2.00000000	\$5.00
<input checked="" type="checkbox"/>	Material	Snow Calcium	0.0000	0.0000	CT	1.00000000 CT per BAG	<input type="checkbox"/>	\$30.00000000	1.25000000	\$5.00

- 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.

Edit Service: Snow - Ice Melting

Branch Arctic Optional Service Occurrence Label

View Contract Default

Service

Service item NOT included

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	Ext Total Price	GM
Item Total				0.00								\$0.00	\$0.00	\$0.00	0.00%

Formula Items

Grand Total 0.00 \$0.00 \$0.00 \$0.00 0.00%

Service: Snow - Ice Melting

General Service Branches **Service Items** Duties Budget Template Alternate Language

Service Items

Service Item Include Inactive Find Reset Filter

Service Item	La	Fac	Branch
Snow Calcium (BAG)	0.1		--ALL--
Snow Calcium (SF)	0.00010000	2.00000000	0.00062500 1.25000000 <input type="checkbox"/> --ALL--
Subcontractor			<input type="checkbox"/> --ALL--

If the Material exists in any Service item, the cost of that material will be used along with the markup specified on the Work Order

- 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.

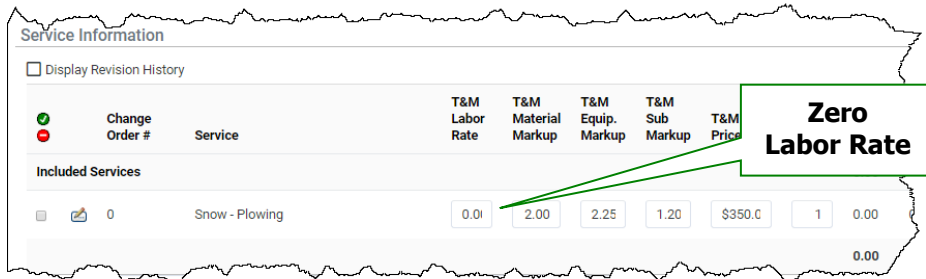
Regardless of whether Service Items are included or not, the Labor Rate will be based on the rate set on the Service on the bid.

Equipment Only Service Items

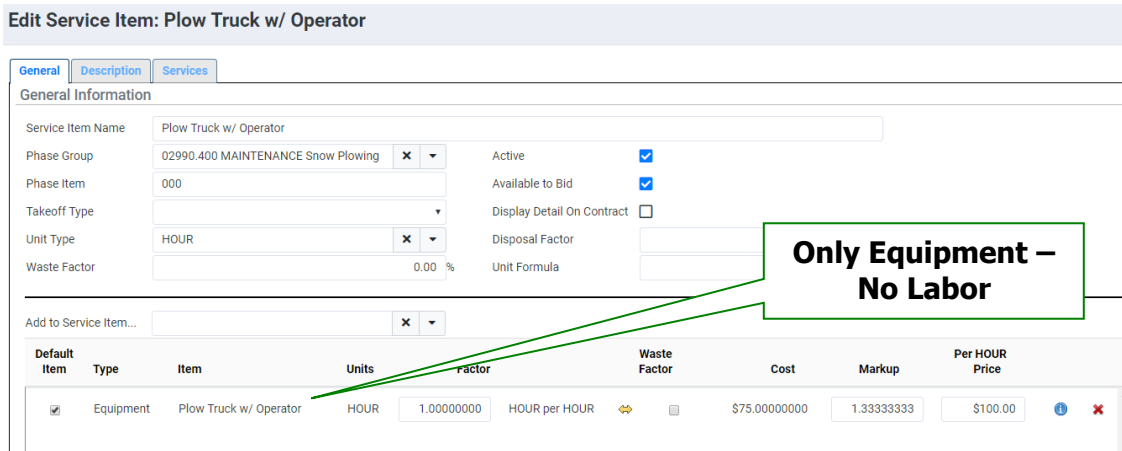
Sometimes the business practice or the customer preference is to be charged for the Equipment and to have the Labor included in the Equipment price. In this case, the Service and Service Items would be setup a bit differently so that the Labor for operating the Equipment is in the markup for the Equipment.

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

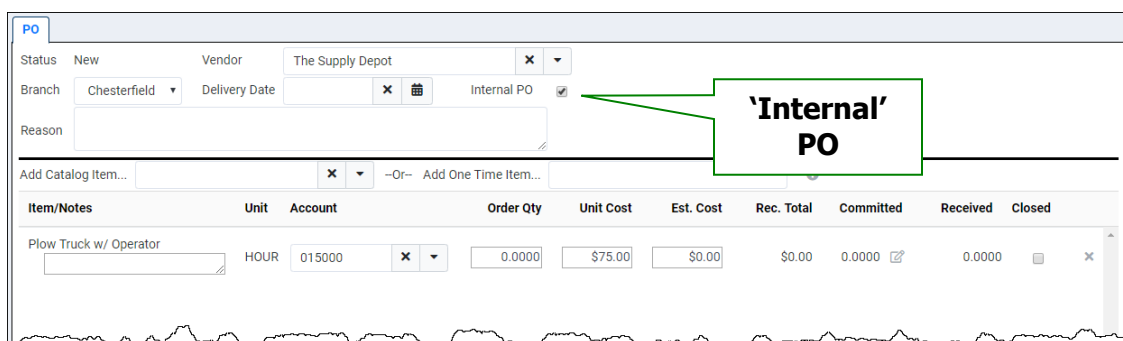
Costing and Payroll) but the invoice amount for this labor will be zero.



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.

Work Order # 1778 for Enterprise Campus (Rev 0)

General | Details | Documents | Activities | Notes

General Information

Description: Snow Removal

Sales Rep: Angela Jones | Operations Manager: John Masters

Bill Type: T&M | Status: Bidding | Property: Enterprise Campus

Invoice Frequency: As Completed | Sale Probability: 0.00 %

Start Date: 11/01/2019 | End Date: 03/31/2020

Progress Bill:

Service Information

Display Revision History

Change Order #	Service	T&M Labor Rate	T&M Material Markup	T&M Equip. Markup	T&M Sub Markup	T&M Min. Price	Occurs	Labor Qty	Calcs	Cost Per Occur	Total Cost	Price Per Occur	Total Price
0	Snow - Plowing	60.	2.00	2.00	1.30	\$60.00	5	2.10	6.10	\$0.00	\$0.00	\$0.00	\$0.00
0	Snow - Shoveling	45.	2.00	2.00	1.30	\$45.00	5	0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Snow - Salting	60.	2.00	2.00	1.30	\$60.00	5	1.00	1.00	5.00	\$290.00	\$1,450.00	\$362.50
0	Snow - Loader	150.	1.50	2.00	1.30	\$450.00	5	0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Snow - Skidsteer	250.	1.50	2.00	1.30	\$250.00	5	0.00	0.00	\$0.00	\$0.00	\$0.00	\$0.00
0	Snow - Additional Snow Removal	75.	2.00	2.00	2.00	\$0.00	1	1.10	1.10	\$322.50	\$322.50	\$402.50	\$402.50

Annotations:

- 'T&M' Bill Type
- Progress Bill
- One Occurrence for each Month of the Contract
- T&M Rates and Markups

Job Ticket

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

Create Job Tickets For WO

Select the Work Order(s) to create all job tickets.

Note:
The date must occur within the Start and End Date of the Work Order.

Start Date <= 11/01/2019

Branch

Property

Operations Manager

Work Order

- [WO 755] Snow Removal
- [WO 760] T&M Snow Removal

Create WO Tickets

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 Detail for Applebees - Manchester - Service Name: Snow - Shoveling - Occurrence: 1

General
Visits
Invoices
Field Notes
Photos

General Information

Job #	295	Ticket #	5396
Job Type	Work Order	Bill Type	T&M
Status	Run	Branch	Chesterfield
Variable Occurrence	<input type="checkbox"/>	Service	Snow - Shoveling

Job Description: Snow Removal

Ticket Details

Crew Leader	<input type="text"/>	Route	<input type="text"/>
Date Completed	<input type="text"/>	Scheduled Date	08/02/2019
Time Completed	<input type="text"/>	Order Worked	<input type="text"/>
Actual Disposal	<input type="text"/>	Est Disposal Yrds	0.00
Misc. Cost	\$0.00	Production Notes	<div style="border: 1px solid #ccc; height: 20px;"></div>
Customer PO	<input type="text"/>	Ticket Specific Notes	<div style="border: 1px solid #ccc; height: 20px;"></div>
Bill Amount	\$625.00		
T&M Actual Amount	\$7.50		

Time & Job Costs

Hours Estimated 20 Remaining 12.5

Work Date	Labor Hours	Sub Hours
08/05/19	6.00	0.00
08/06/19	1.50	0.00
Total Hours:	7.50	0.00

2 total records

Description	Print	Required Units	Committed Remain.	Allocated	Est. Co	Act. Cost	Billed Units	Bill Cost
Snow Calcium	<input checked="" type="checkbox"/>	0.0000	0.0000	3.0000	\$0.00	\$90.00	3.0000	\$0.00
Totals:		0.0000	0.0000	3.0000	\$0.00	\$90.00	3.0000	\$0.00

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.

Work Detail for Applebees - Manchester - Service Name: Snow - Plowing - Occurrence: 1

General Information

Job # 295 Ticket # 5395 Job Description Snow Removal
 Job Type Work Order Bill Type T&M
 Status Run Branch Chesterfield
 Variable Occurrence Service Snow - Plowing

Ticket Details

Crew Leader [] Route []
 Date Completed [] Scheduled Date 01/02/2019
 Time Completed [] Order Worked []
 Actual Disposal [] Est. Disposal Yds 0.00
 Misc. Cost \$0.00 Special Invoice []
 Customer PO []

Time & Job Costs

Hours Estimated 20 Remain [] Search [] Show Print Either [] Find []

Work Date	Labor Hours	Sub Hours	Description	Print	Required Units	Committed Remain.	Allocated	Est. Cost	Act. Cost	Billed Units	Bill Cost
08/27/19	3.00	0.00	Plow Truck w/ Operator	<input checked="" type="checkbox"/>	0.0000	0.0000	3.0000	\$0.00	\$225.00	3.0000	\$225.00

Labor Hours (highlighted in green)

Equipment Hours (highlighted in green)

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.

Generate Invoices

Invoice Type

Progress Bill

'Work Through' Date

Invoice By: Branch/Property
 Branch: Chesterfield
 Property: [x] [v]
 Invoice Type: Regular [x] [v]
 Completed Through: 08/31/2019 [x] [calendar]
 Contract
 Work Order- Standard Bill
 T&M Work Order- Progress Bill
 CWO - Standard Bill
 Customer Note: [text area]
 Generate

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.

Generate Invoices

Invoice Type

Standard Bill

'Work Through' Date

Invoice By: Branch/Property
 Branch: Chesterfield
 Property: [x] [v]
 Invoice Type: Regular [x] [v]
 Completed Through: 08/15/2019 [x] [calendar]
 Contract
 Work Order- Standard Bill
 T&M Work Order- Progress Bill
 CWO - Standard Bill
 Customer Note: [text area]
 Generate

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.

INVOICE 849
INVOICE DATE 01/13/2023

<p align="center">BILL TO</p> <p>B & C Company 1800 N. Forty Dr. St. Louis, MO 63126</p> <p>Phone: 636-534-5022</p>	<p align="center">PROPERTY ADDRESS</p> <p>Enterprise Campus - (SN13C) 600 Corporate Park Dr St Louis, MO 63105</p>
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Labor Charge

INVOICE	TERMS	Account Owner
01/13/2023	Net 30 Days	Snow Student 13
DESCRIPTION		PRICE
WORK ORDER: 1912		
T&M		\$795.00
<i>Snow - Shoveling #1</i>		\$795.00
TIME		
01/09/2023 (4.25 HR x \$50.00)		
01/11/2023 (3.25 HR x \$50.00)		
MATERIALS		
01/09/2023 Snow Calcium (7.0000 x \$60.00)		
Payment Code: X3PTHSWC		
INVOICE GRAND TOTAL		\$795.00

Material Charge

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

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
 B & C Company
 1800 N. Forty Dr.
 St. Louis, MO 63126

Phone: 636-534-5022

PROPERTY ADDRESS
 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
<i>Snow - Truck w/Plow #1</i>		\$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>

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.

Service: Snow - Plowing

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 - Large Storm (6'-9')	0.00010000	3.00030003			<input type="checkbox"/>	--ALL--	
Plow - Medium Storm (3'-6')	0.00003333	3.00030003			<input type="checkbox"/>	--ALL--	
Plow - Small Storm (1'-3')	0.00002222	3.00030003			<input type="checkbox"/>	--ALL--	
Snow Plowing Hourly	1.00000000	4.00000000			<input checked="" type="checkbox"/>	--ALL--	

4 total records

Update Cancel

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.

Contract # 1939 for Annie Gunns - (SN3A) (Rev 0)

General Details Documents Activities Notes ACME Landscape Settings

General Information

Description: Per Occurrence **'Budget' Bill**

Sales Rep: Snow Student 3

Estimator:

Bill Type: Budget

Start Date: 11/01/2022

End Date: 03/31/2023

Bid Due Date:

Anticipated Close Date:

Operations Manager:

Status:

Property: Annie Gunns - (SN3A)

Sale Probability: 100 %

Discount: 0.00 %

Avg. Audit Score:

Auto Renew: Auto Renew option not configured.

Copied from: 1852

Renewed from: 1852

Service Information

Display Revision History

Change Order #	Service	Occurs	Labor Qty	Calc Qty	Total Labor Qty	Cost Per Occur	Service Per Occur	Total Price	Gross Marg Pct	
Included Services			0.90	0.90		\$980.75		\$1,344.40		
<input type="checkbox"/>	0 Snow - Plowing	5	0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	.0%	
<input type="checkbox"/>	0 Snow - Shoveling	5	0.00	0.00	0.00	\$0.00	\$0.00	\$0.00	.0%	
<input type="checkbox"/>	0 Snow - Ice Melting	5	0.75	0.75	3.75	\$159.38	\$796.90	\$213.28	\$1,066.40	25.3%
<input type="checkbox"/>	0 Snow - Salting	5	0.15	0.15	0.77	\$36.77	\$183.85	\$55.60	\$278.00	33.9%
			0.90	0.90	4.52		\$980.75		\$1,344.40	27.05%

4 total records

One Occurrence for each Month of the Contract Term

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	\$20.01		\$0.00	0.00	0.00	<input type="checkbox"/>	\$460.00	\$1,840.00
Plow - Large Storm (6'-9")	2.00	20,000.00	SQFT	2.00	2.00	\$20.01		\$0.00	0.00	0.00	<input type="checkbox"/>	\$40.00	\$120.01
Plow - Medium Storm (3'-6")	5.00	20,000.00		0.666	0.6666	\$20.01		\$0.00	0.00	0.00	<input type="checkbox"/>	\$13.33	\$40.00
Plow - Small Storm (1'-3")	6.00	20,000.00						\$0.00	0.00	0.00	<input type="checkbox"/>	\$8.89	\$26.67
Item Total												\$522.22	\$2,026.68

Service Item Occurs

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	Material	Material Cost	Material Qty	Calc Qty
Snow Plowing Hourly	6.00	0.00	HR		\$36.01	0.00	0.00
Plow Truck	6.00	195,000.00	SQFT	4.332'	\$36.01	4.3329	4.3329
Total							

Estimate based on Sq Ft

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	\$45.31
Plowing, Truck w/Blade, Med/High Efficiency	6.00	59,340.00	SQ FT	1.854	1.8544	\$45.31
Total				3.668		

Sq ft estimate based on efficiency

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.

Create Job Tickets

Select the service or services to create the next occurrence job ticket.

Note:
A system setting determines how many tickets per service can be available for a property.

Week Of	11/01/2019	X	📅
Branch			▼
Property	Corporate Square	X	▼
Operations Manager		X	▼
Service	<ul style="list-style-type: none"> (4) Snow - Ice Melting (4) Snow - Plowing (4) Snow - Salting (3) Snow - Shoveling 		

Create Contract Tickets

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.

Generate Invoices

Invoice By:

Branch:

Property:

Invoice Type: Month to Invoice

Invoice Timing: January

Invoice Timing: First

Invoice Timing: 2022

Customer Note:

Invoice View

INVOICE 851
INVOICE DATE 11/01/2022

BILL TO	PROPERTY ADDRESS
Ameristar 123 Main St. Suite 100 Chesterfield, MO 63005 Phone: 123-456-7890	Innie Gunns - (SN3A) 6806 Chesterfield Airport Rd Chesterfield, 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>

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: Snow - Plowing 3.1-6"

General | Service Branches | Service Items | Duties | Budget Template | Alternate Language

General Information

Service Name	Snow - Plowing 3.1-6"			Active	<input checked="" type="checkbox"/>
Contract Service Name	Snow - Plowing 3.1-6"			Available for Contract	<input checked="" type="checkbox"/>
Taxable Item Types		x	v	Standard Service	<input type="checkbox"/>
Takeoff Measurements	Snow Removal - Plow	x	v	Invoice Approval Not Required	<input type="checkbox"/>
Occurrences	0			Completed Takeoff Required	<input type="checkbox"/>
Revenue Class	Snow	x	v	Show Configurable Hint	<input type="checkbox"/>
Flower Type		x	v	Allow Service Item Occurs	<input type="checkbox"/>
Order Num	812				
Minimum Price	0.00				

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.

Edit Service Item: Plow Truck

General | Description | Services

General Information

Service Item Name: Plow Truck

Phase Group: 02990.400 MAINTENANCE Snow Plowing Active

Phase Item: 200 Available to Bid

Takeoff Type: Snow Removal - Plow Display Detail On Contract

Unit Type: SQFT Disposal Factor: 0.00000000 Unit Formula:

Waste Factor: 0.00 %

Add to Service Item...

Default Item	Type	Item	Units	Factor	Waste Factor	Cost	Markup	Per SQFT Price
<input checked="" type="checkbox"/>	Labor	Supervisor	HR	55,005.500551	SQFT per HR	\$20.00000000	2.50000000	\$0.00

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.

Contract # 1778 for Enterprise Campus (Rev 0)

The screenshot displays the 'General Information' tab for Contract # 1778. Key fields include:

- Description:** Snow Removal
- Sales Rep:** Angela Jones
- Bill Type:** Contract
- Invoice Frequency:** As Completed
- Start Date:** 11/01/2019
- End Date:** 03/31/2020

Below the general information is a table of 'Included Services':

Change Order #	Service	Occurs	Labor Qty	Material Qty	Total Labor Qty	Cost Per Occur	Total Cost	Price Per Occur	Total Price	Gross Marg Pct
0	Snow - Plowing 0-3"	0	1.88	1.88	0.00	\$3	\$0.00	\$0.00	\$0.00	
0	Snow - Plowing 3.1-6"	0	3.72	3.72	0.00	\$74.41	\$0.00	\$5.03	\$0.00	.0%

An 'Edit Service' window is open for 'Snow - Plowing 0-3"', showing options for 'Optional Service', 'Variable Occurrence', and 'Occurrence Label' (checked).

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.

Contract # 1852 for Annie Gunns - (SN3A) (Rev 0)

The screenshot displays the 'General Information' tab for Contract # 1852. Key fields include:

- Description:** Per Occurrence
- Sales Rep:** Snow Student 3
- Bill Type:** Contract
- Invoice Frequency:** As Completed
- Start Date:** 11/01/2022
- End Date:** 03/31/2023

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.

Contract # 1852 for Annie Gunns - (SN3A) (Rev 0)

General Information

Description: Per Occurrence

Sales Rep: Snow Student 3

Estimator: [Empty]

Bill Type: Contract

Invoice Frequency: Monthly

Start Date: 11/01/2022

End Date: 03/31/2023

Bid Due Date: [Empty]

Anticipated Close Date: [Empty]

Operations Manager: [Empty]

Job Status: Available Pending Change Order 1

Property: Annie Gunns - (SN3A)

Sale Probability: 100 %

Discount: 0.00 %

Avg. Audit Score: [Empty]

Auto Renew: Auto Renew option not configured.

Copied from: Template

Renewed from: Not a renewal

Service Information

Contract # 1852 for Annie Gunns - (SN3A) (Re)

Details

Billing Contact: DJ Ward

Legal Contact: [Empty]

Invoice Timing: [Dropdown Menu]

Revenue Class: [Empty]

Taxable: [Empty]

Apply Fuel Surcharge: [Empty]

Include In Client Budget Report: [Empty]

Customer PO #: [Empty]

Multi-Year Contract #: [Empty]

Cover Page Title: [Empty]

Default Pay Code: [Empty]

Name

First

Middle

Last

3 found

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.

Generate Invoices

Invoice Type

Contract Bill

Invoice By: Branch/Property

Branch: Arctic

Property: [x] [v]

Invoice Type: Regular [x] [v]

Completed Through: 01/31/2023 [x] [calendar]

Contract

Work Order- Standard Bill

T&M Work Order- Progress Bill

CWO - Standard Bill

Customer Note: [text area]

Generate

After 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.

Generate Invoices

Invoice Type

Invoice Timing

Invoice By: Branch/Property

Branch: Arctic

Property: [] x

Invoice Type: Regular - Monthly x

Bill Type: Contract
 Work Order- Standard Bill
 T&M Work Order- Progress Bill
 CWO - Standard Bill

Invoice Timing: January x

Invoice Timing: First x

Invoice Timing: 2023 x

Customer Note: []

Generate

BILL TO

Adam Reynolds, LLC
 5013 North South Rd
 Chesterfield, MO 51386

Phone: 555-111-2222

PROPERTY ADDRESS

BrickHouse Tavern - (SN)
 2 McBride & Son Center Dr
 Chesterfield, MO 63005

INVOICE 855

INVOICE DATE 01/18/2023

Charges for Each Occurrence

INVOICE	TERMS	BRAD SALTER
01/18/2023	30 Days	Brad Salter
DESCRIPTION		PRICE
6621	01/16/2023: SNOW - PLOWING 3.1-6" Snow - Plowing 3.1-6"	\$350.00
7469	01/16/2023: SNOW - PLOWING 3.1-6" Snow - Plowing 3.1-6"	\$350.00
7468	01/16/2023: SNOW - SALTING Snow - Salting	\$285.00
Payment Code: M3XL25KY		INVOICE GRAND TOTAL \$985.00

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

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.

Edit Service Item: Subcontractor

General Information

Service Item Name: Subcontractor

Phase Group: 02990.400 MAINTENANCE Snow Plowing

Phase Item: 000

Takeoff Type: [Dropdown]

Unit Type: DOLL

Waste Factor: 0.00 %

Active:

Available to Bid:

Display Detail On Contract:

Disposal Factor: 0.00000000

Unit Formula: [Field]

Add to Service Item... [Dropdown]

Default Item	Type	Item	Units	Factor	Waste Factor	Cost	Markup	Per DOLL Price
<input checked="" type="checkbox"/>	Sub	Subcontractor	DOLL	1.00000000	DOLL per DOLL	\$1.00000000	1.20000000	\$1.20

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.

Item: Subcontractor

General | Chemical Treatment | Upload Picture | Price List | Service Item

Item Type	Sub				
Item Name	Subcontractor				
Item Technical Name	Subcontractor				
Item Category	510 Subcontractor		X	▼	
Purchase Units	DOLL	X	▼	Active	<input checked="" type="checkbox"/>
Allocation Units	DOLL	X	▼	Allow Overallocation	<input type="checkbox"/>
Conversion Factor	1.000 DOLL per			Display Invoice Price Detail	<input type="checkbox"/>
Item Code				Alternate Languages	<input type="checkbox"/>
Default Cost	\$1.00000000				
EPA Number					
Manufacturer					
Description	Subcontractor				

Update | Cancel | Service Item

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.

Edit Service: Snow - Plowing

Branch Arctic Replacement Service Optional Service Variable Occurrence Occurrence Label X

View Contract Default X X X X Service Item X

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	Est Total Price
Q Plow - (1'-3') Small Storm	1.00	0.00	SQFT	0.00	0.00	\$36.0		\$0.00	0.00	0.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00
Q Plow - (3'-6') Medium Storm	1.00	0.00	SQFT	0.00	0.00	\$36.0		\$0.00	0.00	0.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00
Q Plow - (6'-9') Large Storm	1.00	0.00	SQFT	0.00	0.00	\$36.0		\$0.00	0.00	0.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00
Q Snow Plowing Hourly	1.00	0.00	HR	0.00	0.00	\$36.0		\$0.00	0.00	0.00	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00
Q Subcontractor	1.00	75.00	DOLL	0.00	0.00	\$0.00		\$0.00	0.00	0.00	<input type="checkbox"/>	\$75.00	\$90.00	\$90.00
Item Total				0.00								\$75.00	\$90.00	\$90.00

Formula Items

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.

Material Management

Branch Property

Job # Service Name

Ticket Status X Item Name

Item Category X Item Type

Unallocated Amount Material Unit Type

Job Type X Sales Rep

Scheduled/Work Complete Date X To X Operations Manager

Property	Job #	Ticket #	Ticket Status	Category	Item/Description	Item Type	Unit Type	Date	Required Units	Est. Cost	Committed	Allocated/Received	Remaining	Inventory	
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1930	7318	Open	510 Subcontractor	Subcontractor	Sub	DOLL	11/01/2021	75.0000	\$1.0000	0.0000	0.0000	75.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1930	7319	Open	510 Subcontractor	Subcontractor	Sub	DOLL	12/01/2021	75.0000	\$1.0000	0.0000	0.0000	75.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1930	7320	Open	510 Subcontractor	Subcontractor	Sub	DOLL	01/01/2021	45.0000	\$1.0000	0.0000	0.0000	45.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1930	7321	Open	510 Subcontractor	Subcontractor	Sub	DOLL	02/01/2021	45.0000	\$1.0000	0.0000	0.0000	45.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1930	7322	Open	510 Subcontractor	Subcontractor	Sub	DOLL	03/01/2021	45.0000	\$1.0000	0.0000	0.0000	45.0000	0.0000

10 total records

PO #1179 Receipts

Status Approved Vendor Frost Snow Removal

Branch Chesterfield Delivery Date Internal PO

Reason Job #1930 Sub Snow

Add Catalog Item... --Or-- Add One Time Item...

Item/Notes	Unit	Account	Order Qty	Unit Cost	Est. Cost	Rec. Total	Committed	Received	Closed
Subcontractor	DOLL	015000	600.0000	\$1.00	\$600.00	\$0.00	600.0000	0.0000	<input type="checkbox"/>

Commitments

Item Subcontractor
Units Ordered 600.0000 DOLL
Allocation Units 600.0000 DOLL

[Add Ticket...](#)

Ticket	Units Rem.	Budget	Comm. Units
Ticket #7319 : Enterprise Campus - (SN13C) : Contract #1930 : Snow - Plowing	0.0000	\$75.00	75.0000
Ticket #7320 : Enterprise Campus - (SN13C) : Contract #1930 : Snow - Shoveling	0.0000	\$45.00	45.0000
Ticket #7321 : Enterprise Campus - (SN13C) : Contract #1930 : Snow - Shoveling	0.0000	\$45.00	45.0000
Total Committed			600.0000
Total Remaining			0.0000

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.

Purchase Order Receipt

PO Number 1179 Invoice Date Vendor Frost Snow Removal

Receipt Date 02/17/2021 Invoice # Status

Default Inventory Location (* Branch Default) Chesterfield Inventory*

Item	Committed	Received	Receiving	Over Allocated	Unit	Ext. Cost	Calc. Unit Cost	Est. Unit Cost	Closed
Subcontractor			75.0000		DOLL	\$75.00	\$1.00	\$1.00	<input type="checkbox"/>
Enterprise Campus - (SN13C) : Contract #1930 : Snow - Plowing (Ticket #7315)	75.0000	0.0000	75.0000	0.0000	DOLL				
Enterprise Campus - (SN13C) : Contract #1930 : Snow - Plowing (Ticket #7316)	75.0000	0.0000	0.0000	0.0000	DOLL				
Enterprise Campus - (SN13C) : Contract #1930 : Snow - Plowing	75.0000	0.0000	0.0000	0.0000	DOLL				
Total						\$75.00			

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.

Edit Service Item: Plow Subcontractor

General | Description | Services

General Information

Service Item Name: Plow Subcontractor

Phase Group: 02990.400 MAINTENANCE Snow Plowing Active

Phase Item: 000 Available to Bid

Takeoff Type: Display Detail On Contract

Unit Type: DOLL Disposal Factor: 0.00000000

Waste Factor: 0.00 % Unit Formula:

Add to Service Item...

Default Item	Type	Item	Units	Factor	Waste Factor	Cost	Markup	Per DOLL Price
<input checked="" type="checkbox"/>	Sub	Plow Subcontractor	DOLL	1.00000000	DOLL per DOLL	\$1.00000000	1.20000000	\$1.20

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.

Item: Plow Subcontractor

General
Chemical Treatment
Upload Picture
Price List
Service Item

Item Type: Sub

Item Name:

Item Technical Name:

Item Category: X ▼

Purchase Units: X ▼ Active

Allocation Units: X ▼ Allow Overallocation

Conversion Factor: DOLL per Display Invoice Price Detail

Item Code: Alternate Languages

Default Cost:

EPA Number:

Manufacturer:

Description:

Update
Cancel
Service Item

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.

Edit Service: Snow - Plowing

Branch: Arctic Replacement Service Optional Service Variable Occurrence Occurrence Label:

View: Contract Default X ▼ Service Item:

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	Est Total Price	GM
Q Plow - (1'-3') Small Storm	1.00	<input type="text" value="0.00"/>	SQFT	0.00	0.00	\$36.0		<input type="text" value="\$0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	0.00%
Q Plow - (3'-6') Medium Storm	1.00	<input type="text" value="0.00"/>	SQFT	0.00	0.00	\$36.0		<input type="text" value="\$0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	0.00%
Q Plow - (6'-9') Large Storm	1.00	<input type="text" value="0.00"/>	SQFT	0.00	0.00	\$36.0		<input type="text" value="\$0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	0.00%
Q Snow Plowing Hourly	1.00	<input type="text" value="0.00"/>	HR	0.00	0.00	\$36.0		<input type="text" value="\$0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="checkbox"/>	\$0.00	\$0.00	\$0.00	0.00%
Q Plow Subcontractor	1.00	<input type="text" value="60.00"/>	DOLL	0.00	0.00	\$0.00		<input type="text" value="\$0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="checkbox"/>	\$60.00	\$72.00	\$72.00	16.67%
Item Total				0.00								\$60.00	\$72.00	\$72.00	17.00%

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.

Material Management

Branch: [dropdown]
Job #: 1931
Ticket Status: Open,Run
Item Category: [dropdown]
Unallocated Amount: > 0
Job Type: [dropdown]
Scheduled/Work Complete Date: [calendar] To [calendar]

Property: [dropdown]
Service Name: [dropdown]
Item Name: [dropdown]
Item Type: [dropdown]
Material Unit Type: [dropdown]
Sales Rep: [dropdown]
Operations Manager: [dropdown]

Note that the item description is service specific

Property	Job #	Ticket #	Ticket Status	Category	Item/Description	Item Type	Material Unit Type	Date	Required Units	Est. Cost	Committed	Allocated/Received	Remaining	Inventory	
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1931	7327	Open	510 Subcontractor	Plow Subcontractor	Sub	DOLL	03/01/2021	60.0000	\$1.0000	0.0000	0.0000	60.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1931	7328	Open	510 Subcontractor	Plow Subcontractor	Sub	DOLL	11/01/2021	60.0000	\$1.0000	0.0000	0.0000	60.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1931	7329	Open	510 Subcontractor	Plow Subcontractor	Sub	DOLL	12/01/2021	60.0000	\$1.0000	0.0000	0.0000	60.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1931	7330	Open	510 Subcontractor	Shovel Subcontractor	Sub	DOLL	01/01/2021	30.0000	\$1.0000	0.0000	0.0000	30.0000	0.0000
<input checked="" type="checkbox"/>	Enterprise Campus - (SN13C)	1931	7331	Open	510 Subcontractor	Shovel Subcontractor	Sub	DOLL	02/01/2021	30.0000	\$1.0000	0.0000	0.0000	30.0000	0.0000

10 total records
[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.

Revenue Class ^	Payroll Code	GL Rev Labor Acct	GL Rev Mat Acct	GL Sub Acct
Subcontractor		5500	5500	
Arbor		6200	5200	

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.

Order #	Service	Revenue Class
809	Snow - Plowing Subcontractor	Subcontractor
810	Snow - Plowing	Snow

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					<input type="checkbox"/>	--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					<input type="checkbox"/>	--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.

Item: Plow Subcontractor

General | Chemical Treatment | Upload Picture | Price List | Service Item

Item Type: Sub

Item Name: Plow Subcontractor

Item Technical Name: Plow Subcontractor

Item Category: 510 Subcontractor

Purchase Units: DOLL x Active

Allocation Units: DOLL x Allow Overallocation

Conversion Factor: 1.000 DOLL per Display Invoice Price Detail

Item Code: DOLL Alternate Languages

Default Cost: \$1.00000000

EPA Number:

Manufacturer:

Description: Plow Subcontractor

Update | Cancel | Service Item

+ Item Category

Category Name ^	Category Class	Default GL Cost Acct.	Default Markup
190 Lawn Installation			1.00000000
200 Lighting			1.00000000
210 Miscellaneous		201050	1.00000000
220 Irrigation	Other		1.00000000
230 Chemicals			1.00000000
240 Equipment		201000	1.00000000
500 Snow Supplies		202121	1.00000000
510 Subcontractor		203050	1.00000000

« < 1 2 3 > » 28 total records