

Linking Client Work Schedules to a Repetitive Contract

Step 1 – Setting up Repetitive Rates.

- 1. Select 'Clientele', 'Client Contracts' from the Powerforce navigator.
- 2. Select the client for which you wish to set up a repetitive contract.
- 3. Click on the 'Repetitive Rates' tab to set up the rate/s you wish to charge for repetitive services.
- 4. Double click on the repetitive charges table to bring up the charge rates window.

The screenshot shows the 'Client Details' window with the 'Repetitive Rates' tab selected. The 'Contract Start' date is circled in red.

Code	Description	Rate	Charge To
1			
2			
3			
4			

Repetitive Charge Rates for POW-ACT POWERFORCE ACT

Charge Code
 PP Permanent Patrols
 No GST Use the above Description On Invoices

Rebates And Discounts
 Rebate
 Discount

Rate Type
 Flat Rate
 Span Rate
 Timed Rate

General Ledger Details
 GL Account 0500
 Cost Centre

Override Charge Debtor

Repetitive Amortised Rate

Update/Edit Rates
 Date And Rate Are Required For ALL Types
 Effective Date
 Effective Rate
 Purchase Order Text P/O
 Purchase Order
 Add Update Delete

Effective Rates and Dates

	Date	Rate	PO Number

Timed Rates

	Minutes	Rate
1		
2		
3		
4		
5		

Spanned Rates
 Apply Award Levels

	Band	Hrs x1.0	Rate	Hrs x1.5	Rate	Hrs x2.0	Rate	Hrs x2.5	Rate	Hrs x3.0	Rate
1											
2											
3											
4											

Apply
 Cancel
 Delete Row
 View Sites

5. Select the charge code relating to the repetitive services you intend to provide.
6. Fill in the rest of the relevant details, as you would do setting up any charge code.
 Note: the 'Effective Rate' field is the total amount you are charging for the repetitive period.
7. In the 'Repetitive Amortised Rate' field, place an average/approximate hourly rate you are charging for these services. This value has no effect on the eventual invoice and is used for your own internal costing only.

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General Ledger Details
 GL Account 0500
 Cost Centre

Override Charge Debtor

Repetitive Amortised Rate
 27.0000

Update/Edit Rates
 Date And Rate Are Required For ALL Types
 Effective Date 03 JAN 2005
 Effective Rate 20000.0000
 Purchase Order Text P/O
 Purchase Order
 Add Update Delete

Effective Rates and Dates

	Date	Rate	PO Number
1	03 JAN 2005	20000.0000	

Timed Rates

	Minutes	Rate
1		
2		
3		
4		
5		

8. Apply these changes and then move on to step 2.

Step 2 – Linking the work schedules to the repetitive contract.

1. Display the work schedules for this client. You can do this by either double clicking on the ‘Services’ table on the ‘Services’ tab in the ‘Client Contracts’ window or by selecting the ‘Client Work schedules’ option from the Powerforce navigator and clicking ‘Edit’.
2. Select a specific work schedule from the table to display all the details for this work schedule.

The screenshot shows the 'Work Schedules - POW-ACT <POWERFORCE ACT> <PACT>' window. It features a table of work schedules and a detailed configuration form below it.

Start	End	Hours	ShortCode	Name	Role	Effective	Valid
00:00	08:30	8.50	WKNI	WKNI	Security Guard	01/02/2005	11/08/2005
06:00	18:00	12.00	WEDAY	WEDAY	Security Guard	04/02/2002	11/08/2005
08:00	16:00	8.00	WKDAY	WKDAY	Security Guard	04/02/2002	11/08/2005
16:00	00:00	8.00	WKAFK	WKAFK	Security Guard	04/02/2002	11/08/2005
18:00	06:00	12.00	WENI	WENI	Security Guard	04/02/2002	11/08/2005

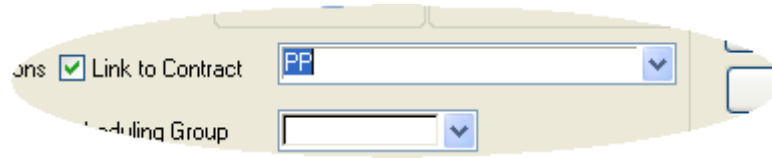
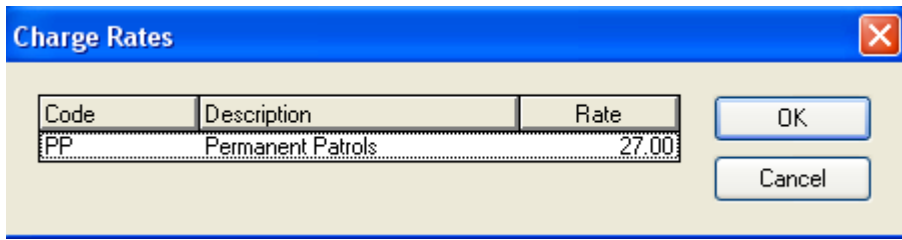
Active	Resources	Reqd Hrs	Charge Hrs	Labour \$	Charge \$	Margin \$	Margin%
All Days 4	14	130.50	130.50	140.98	209.53	68.55	32.72
Regular Days 1	5	40.00	40.00	.00	.00	.00	
Public Holiday Days 0							
Future 0							
Expired 0							
Inactive 0							

The configuration form includes fields for Name (WKDAY), Short Code (WKDAY), Role (SG), Effective From (04/02/2002), Valid To, Book Start (08:00), Book End (16:00), Hours (8.00), Post Start (08:00), Post End (16:00), Hours (8.00), Pattern Code (P), Description (Week Day - Day shift), and Scheduling Group. It also has checkboxes for 'Include in Comment', 'Pay Std Hrs', 'Close Shift', 'Scheduled', and 'Tentative'. A 'Link to Contract' checkbox and dropdown are also present.

3. If there are no work schedules set up for this client, you will have to set them up first. For information on how to set up a work schedule, check your Powerforce User Training Manual or the online help.
4. Now use the ‘Link to Contract’ checkbox and associated dropdown to link this work schedule to the repetitive rate set up in step 1.



5. Using the ‘Link to Contract’ dropdown will display a popup listing only those repetitive rates associated to this particular client.



6. Save these changes to the work schedule.

Step 3 – Confirming the link.

1. Once you have assigned these work schedules to an employee, either through schedule generation or by manually assigning in the ‘Time Scheduling Workbench’, you can confirm that the link to contract does in fact exist.
2. Select any of the relevant shifts in the ‘Time Scheduling Workbench’ and edit them to view the ‘Bookings Window’.
3. Click on the ‘Costs’ tab and view the charges section. You should see the word ‘Contract’ listed with no actual charge being charged to the client.

SICK Leave	2.3300	101.4400	2.3722	
Annual Leave	8.7000	101.4400	8.8253	
Long Service	1.5900	101.4400	1.6129	
Total Cost				152.03
Tuesday	.00	8.00	.00	Contract
Total Charge				.00
Margin				-152.03
				.00

4. The word ‘Contract’ listed here indicates that this shift is to be invoiced as part of a repetitive contract.

Resources