

# TEMPLACMS – CONTRACT PREPARATION/SET UP

## SUMMARY CHECKLIST

February 2022 – Version 1.0



# COMMERCIAL STATEMENT

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# CONTRACT PREPARATION/SETUP – SUMMARY CHECKLIST

- » Hierarchy: **Client > Sites > Contracts > Tasks > Cost/Revenue Types**
- » Business Analysis: drives filtering, security, workflow, reporting

## Creation Steps

1. **Create New Client** (if new client):
  - a. Enter Client details on the General tab then ‘Send to Accounts’ if Dimensions interface or ‘Save’ if another accounts package is used ensuring that the ‘Type’ is set to ‘Managed’
2. **Create New Site** (if new site):
  - a. Enter Site Details on the General tab
  - b. Enter Business Analysis (mandatory) - select an entry against each of the five level
3. **Create New Contract:**
  - a. Enter **Contract Details**, selecting **Site** and entering **Contract date**
    - i. **NB:** Suggest all contract, task & employee effective dates are aligned to 1st June
    - ii. **NB:** There are contract level default rates and pay scales that c/be defined here
  - b. Enter **Tasks**, e.g. **Daily Clean** – one task per task type per budget
  - c. Enter **Calendar** – only if overrides needed
  - d. Enter **Budgets** – enter budget details (at weekly/monthly/yearly), i.e. Wages weekly
  - e. Enter **Pay** – employee assignment, enter:
    - i. Shifts (multiple per day?), hours (if different), rates or pay scale
    - ii. T&A Details, Holiday method, pay calculation, etc.
  - f. **Send for Approval** – makes the contract ‘Live’ status via Workflow

## Contract Amendment

**Make New Version** – this is necessary for all contract changes to create a new ‘**Work in Progress**’ version; the **Send for Approval** option makes this version ‘**Live**’ and the previous version is denoted as ‘**Superseded**’ (and excluded by default from contract filtering).

## Contract Terminations

Use the Termination Wizard which prompts all steps.



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