

Hygiene Services

TEMPLACMS

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COMMERCIAL STATEMENT

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SALES OVERVIEW

The Hygiene Services (HS) module is designed for cleaning contractors who offer this service to their clients, rather than sub-contracting it to a 3rd party.

The scenario used herein is where the contractor manages their own teams of drivers who in turn manage hygiene service routes that are scheduled to be serviced on certain dates/weeks of each month.

Each service route comprises a sequenced list of sites with types and quantities of products (bins, soap dispensers, etc.) to be serviced. Confirmation emails can optionally be sent to the client on confirmation of each service.

Whilst the delivery of HS to a site may occur at high frequency, and on a number of different frequencies (for example, weekly bins and monthly air fresheners), the invoicing associated with it is often on a different frequency – monthly, quarterly or even annually. HS is not therefore carried out as ‘invoice on confirmation’, though variations in delivery will occur, and mechanisms are therefore required to handle the invoicing impact of these.

The management of HS to-date would be performed manually, so with the introduction of the HS module TemplaCMS provides the ability to create and manage service routes on the server, whilst allowing confirmation of the completed items on the service routes via a mobile device.

INTRODUCTION

These training session notes are designed with the intention of providing background information and useful hands on experience of using general CMS functions and the CMS payroll module. These notes are designed to complement the training and assist you at a later stage when away from the training environment.

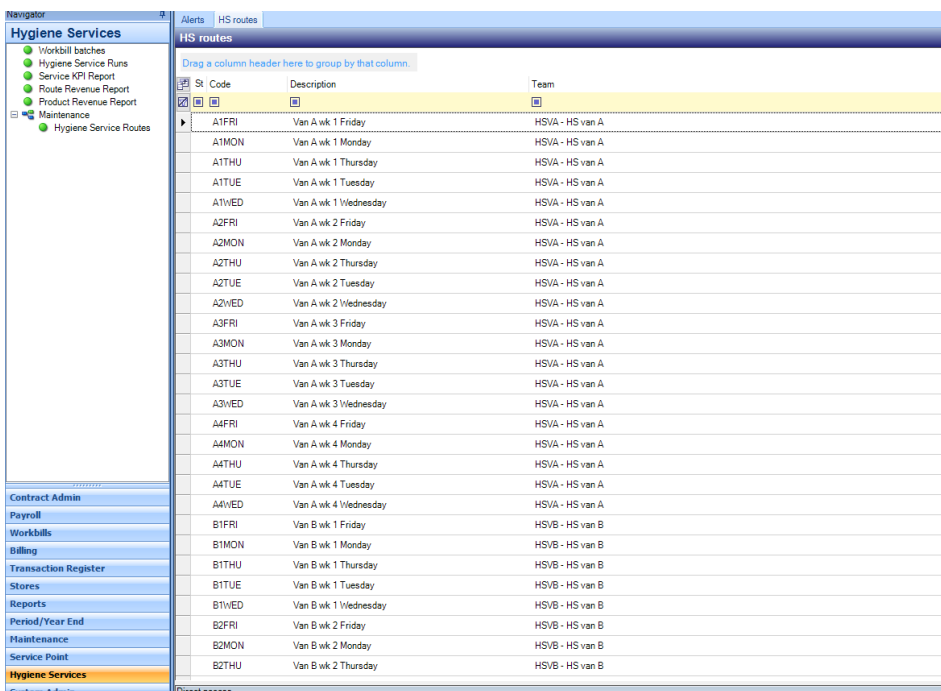
SYSTEM

License

The HS module is separately licensed so a relevant license key must be obtained from Templa and applied to Templa-CMS.

Menu Structure / Navigator

The following default menu structure exists on the Hygiene Services menu:



System Control – Hygiene Services

The **Hygiene Services** option on the **System control** menu allows the definition of the following details:

The screenshot shows the 'System Control - Hygiene Services' configuration window. The window title is 'System Control - Hygiene Services'. It has a menu bar with 'File', 'Tools', and 'Help'. Below the menu bar are 'Close' and 'Save' buttons. The main area is divided into several sections: 'HS' (selected), 'Default price group' (set to 'HS Price List'), 'Maximum routes per service' (set to '4'), 'Billing defaults' (Basis: 'Advance', Frequency: '1 Months', Billing level: 'Product'), 'Default inv text prefix' (text: 'For washroom & Hygiene Services provided to: &SN &SA &SP From &DF to &DT'), and 'Waste transfer notes' (Frequency: '1 Years', Company signatory name: 'Nick', SIC code: '81210', Waste license number: 'CBDU127748', Attachment type: 'Waste Transfer Notes'). The footer contains 'SystemControl_HygieneServices' and '© 2016 Templa Computer Systems Ltd'.

Default price group – this is used for the calculation of billing from the service products. If not specified on the contract, the system control default will be used.

Maximum routes per service – depending on the structure of routes defined (either specific or generic) it is possible that a single service may be assigned to different routes based on the relative frequencies. For this reason, the user may specify the *maximum number of routes per service*.

Billing defaults – as the service products are built up by the user, the billing details are automatically built by the system using the defaults specified here.

Billing level – this can be set to either *Service* or *Product*, depending on the chosen option, the invoicing within TemplaCMS will work as below:

- **Service:** the HS invoice text is defaulted from the defined product details, allowing override. Any change to the defined service will result in the rebuild of the invoice text. When invoicing, a single invoice item is created with product information printed in the description column of the invoice coming from the entered invoice text.
- **Product:** the HS invoice text field is created with pre-set columns for product, quantity, unit price, value and configured price, populated from the HS product details. The billing price option is read-only to allow the unit price on detail lines to be changed as required.

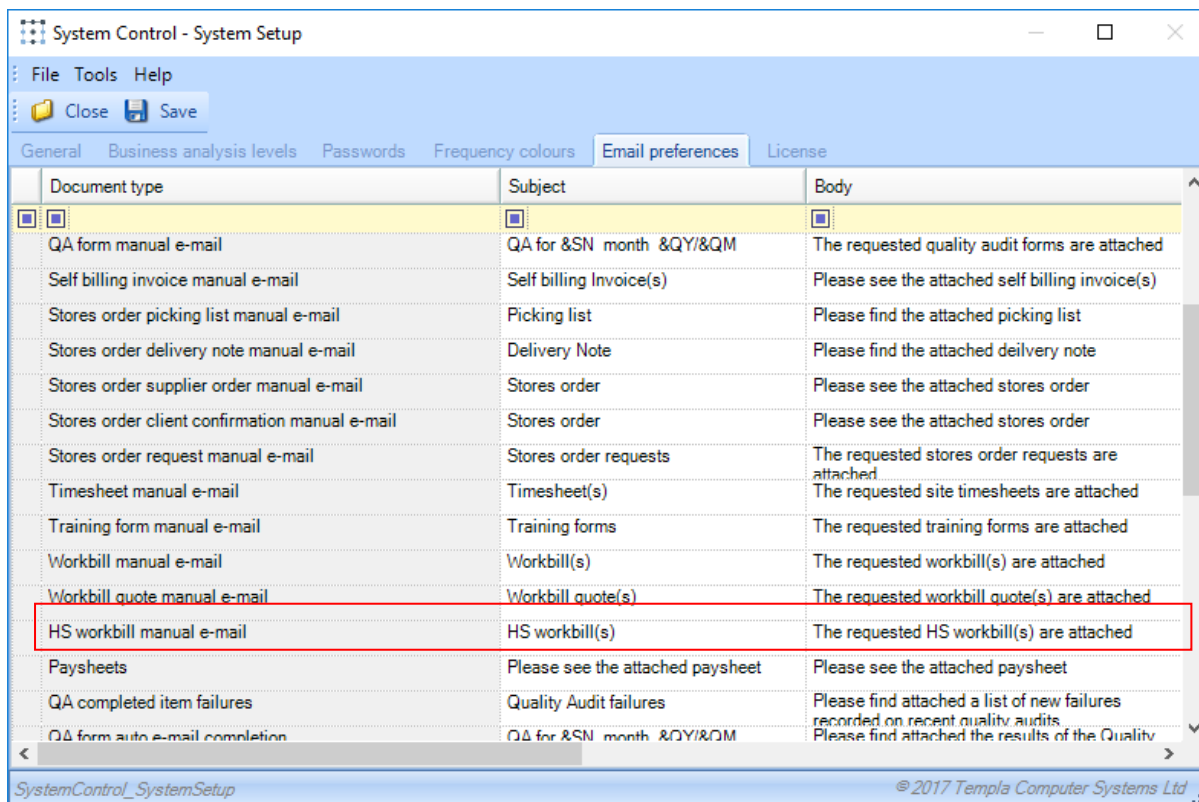
Default inv text prefix – this allows the definition of a system wide standard text prefix for the automatic build-up of invoice text on HS billing lines. Normal text substitutions are available within the text box. Where the contract billing level is set to product, where text is defined it will default as the billing HS invoice header text on all new lines.

Waste transfer notes – A company handling offensive waste is required to comply with ‘duty of care’ procedures which includes annually issuing a ‘waster transfer note’ (WTN) to all sites from which waste is collected.

- *Frequency* – default frequency that WTN’s will be generated, this is normally once a year
- *Company signatory name* – this should be the name of the person at the company whose details will be printed on all WTN’s
- *SIC code* – WTN’s require the SIC code of the ‘transferor’ i.e. the company that transfers the waste to another company to be printed on the note
- *Waste license number* – waste carries should have an environment agency waste carrier license if waste is transported as part of the business. The license number specified here will print on all WTN’s
- *Attachment type* – WTN itself will be stored as an attachment on the site using the attachment type defined here once distributed

System Control – Email Preferences

It is possible to configure email preferences for the emailing of HS workbills to be distinctly different from standard workbills from the **Email preferences** tab on the **System Set-up** menu available from **System Control**.



As with other email preferences, appropriate substitution variables can be used here.

MAINTENANCE

Hygiene Service Routes

Hygiene Service routes can be set up very specifically (as per the example below where each van has a specific route for each day of a 4-week cycle), or generically with just a single route for each van.

Note - this is only the definition of when the route will exist, and not what it will actually be, each time a route is run it may well be different.

Hygiene Services routes can be set up from the **Hygiene Services menu**, via the **Maintenance** option.

St	Code	Description	Team
	A1FRI	Van A wk 1 Friday	HSVA - HS van A
	A1MON	Van A wk 1 Monday	HSVA - HS van A
	A1THU	Van A wk 1 Thursday	HSVA - HS van A
	A1TUE	Van A wk 1 Tuesday	HSVA - HS van A
	A1WED	Van A wk 1 Wednesday	HSVA - HS van A
	A2FRI	Van A wk 2 Friday	HSVA - HS van A
	A2MON	Van A wk 2 Monday	HSVA - HS van A
	A2THU	Van A wk 2 Thursday	HSVA - HS van A
	A2TUE	Van A wk 2 Tuesday	HSVA - HS van A
	A2WED	Van A wk 2 Wednesday	HSVA - HS van A
	A3FRI	Van A wk 3 Friday	HSVA - HS van A
	A3MON	Van A wk 3 Monday	HSVA - HS van A
	A3THU	Van A wk 3 Thursday	HSVA - HS van A
	A3TUE	Van A wk 3 Tuesday	HSVA - HS van A
	A3WED	Van A wk 3 Wednesday	HSVA - HS van A
	A4FRI	Van A wk 4 Friday	HSVA - HS van A
	A4MON	Van A wk 4 Monday	HSVA - HS van A
	A4THU	Van A wk 4 Thursday	HSVA - HS van A
	A4TUE	Van A wk 4 Tuesday	HSVA - HS van A
	A4WED	Van A wk 4 Wednesday	HSVA - HS van A
	B1FRI	Van B wk 1 Friday	HSVB - HS van B
	B1MON	Van B wk 1 Monday	HSVB - HS van B
	B1THU	Van B wk 1 Thursday	HSVB - HS van B

In order to create a **route**, click on **'New'** and complete the following details:

HS Route Details - AG Fri 2

File Tools Help

Close Save Previous Next

General Snapshot Dates

General

Code: AG FRI 2

Description: AG Fri 2

Team: HS - AG

Site: |

Colour: 223, 255, 19

Start date: 18/08/2017

Schedule

Frequency: 4 Weekly

Mon Tue Wed Thu Fri Sat Sun

HygieneServiceRouteDetail © 2017 Templa Computer Systems Ltd

Code – enter a code for the route to be defined.

Description – enter a description for the route, this should be considered carefully to ensure it is easy for users to identify the relevant routes.

Team – each route is associated with a team which could for example be setup as the ‘Van’. Please see the section on **Teams** later in this document.

Site – each van can be defined as a site and associated with a route. This can then be used via the **Projected stock** functionality to generate ‘transfer’ stores orders where the van will be treated as the target delivery site.

Colour – in order to be able to easily identify a route in the HS Manager each route can be assigned a different colour.

Start date – this is the date from which the route will take effect.

Frequency – when defining the frequency, in addition to the normal period and count (e.g. 2 weeks, 1 month, etc.), the facility is provided to schedule more specifically, i.e. relative to a month start or end, or specific days. Thus it is possible to schedule a service route to occur on:

- The last Fri of each month
- The 2nd Wed of each month
- The 11th of each month
- Every Tue, Fri
- Etc.

Teams

As above, each route is associated with a team.

Teams can be created from the **Maintenance -> Payroll** menu by selecting the **Team** option and clicking on **New**.

St	Code	Description
	DC	Deep Cleaning Team
	HSVA	HS van A
	HSVB	HS van B
	HSVC	HS van C
	HSVD	HS van D
	WIN	Window Cleaning Team

The following details should be completed for each (HS) team that is created:

Teams Details - HS van A

File Tools Help

Close Save Previous Next

General Employees Mobile users Dates

Code: HSVA

Description: HS van A

HS user: John Smith

Code – enter a code for the team

Description – enter a description for the team, for example this could be setup as ‘Van’.

HS user – as communication with mobile devices is based around the association between the device and a TemplaCMS user (via ‘device registration’), in order to deliver **HS route** details to a mobile device it is necessary to nominate the user associated with each team that is to be used on a hygiene service route.

Workbill Types

Workbill types specific to hygiene Services should be setup or if they already exist they should be flagged as ‘Hygiene Services’.

Workbill types can be created from the **Maintenance -> Workbills** menu by selecting the **Workbill Types** option and clicking on **New**.

The ‘Enable on mobile?’ checkbox controls which traditional workbills are sent out; it has no impact on HS, i.e. all HS workbills are sent out regardless to the route’s team’s HS user.

Alerts HS routes Teams Workbill Types

Workbill Types

Drag a column header here to group by that column.

St	Code	Description
HS		Hygiene services
Standard		Standard

The following details should be completed for each **Workbill type** that is created:

Workbill Type Details - Hygiene services

File Tools Help

Close Save Previous Next

General Dates

Code: HS

Description: Hygiene services

Enabled on mobile?

HS?

HS extra type: Miscellaneous

WorkbillTypeDetail © 2016 Templa Computer Systems Ltd

Code – enter a code for the **workbill type**.

Description – enter a description for the **workbill type**, in most scenarios a distinction between ‘**Standard**’ and ‘**Hygiene Services**’ workbills is sufficient.

Enabled on mobile? – when ticked this allows mobile users to be able to see and process the relevant **workbill types** on the mobile devices.

HS? – when a **workbill type** is checked as ‘**HS**’ it triggers the specific requirements for processing the workbill with *products and service route information*.

HS extra type – HS workbills that are assigned to teams need an extra type in case the employees will be paid for the workbill although in reality HS drivers are normally on salaries.

Sites

SIC (Standard industrial classification) codes are used to classify business establishments and other standard units by the type of economic activity in which they are engaged. SIC codes are also required for **WTN** processing and should therefore be entered in the **SIC code field** on all sites where the hygiene services will be provided.

File Tools Help

Close Save Save and new Notes Attachments Process sheets Create mail

Default details Transactions

General Properties Business analysis Marketing analysis Contacts Time and attendance Stores ordering

Client: Test v6

Code: MUG001 Current

Name: Mugg & Bean

Address: 159 London Road

Town: Sevenoaks

County: Kent

Postcode: TN13 3UE

Working/cleaning weeks per year: 52.14

Internal stores: No

Site type: Standard

Default mailing contact: (not set)

Timesheet entry style: Default method

Building reference: |

SIC code: SIC123456

DBS check required?

Vetting required?

PPE required?

Food hygiene certificate required?

Managed building?

Products

HS services products should be defined in the same manner as any other product from the **Products** option on the **Maintenance -> Purchasing** menu. To easily distinguish HS Service products from other products it would make sense to have these products in their own **product group and categories**:

Navigator Maintenance

Alerts Product List

Product List

Product group	St Code	Description	COSHH	Purchased as	Sold as	Stocked as	Status	Part no.
Product group : AD HOC - AD HOC ITEMS (1 item)								
Product group : BINS - Bins (2 items)								
Product group : CLEAN EQUIP - Cleaning Equipment Products (5 items)								
Product group : CLEANING - Cleaning Products (2 items)								
Product group : DELIVERY - Delivery Charges (1 item)								
Product group : HS - Hygiene services (1 item)								
Product category : HS - Hygiene services (13 items)								
	DCM	Dust Control Mats	<input type="checkbox"/>	EACH	EACH	EACH	New	
	FHB	Feminine Hygiene Bin	<input type="checkbox"/>	EACH	EACH	EACH	New	
	HSB	HS Sani Bin	<input type="checkbox"/>	EACH	EACH	EACH	New	
	HSSBL	HS Sani Bin Liner	<input type="checkbox"/>	EACH	EACH	EACH	New	
	MWCS	Medical Waste Collection Service	<input type="checkbox"/>	EACH	EACH	EACH	New	

For all *Hygiene Services* products, the **EWC (European waste catalogue) number** should be entered as this is required for WTN processing.

The screenshot shows the 'Products - Clear Refuse Sacks 16 x 25 x 39 x 200' form. The 'General' tab is active, showing fields for Code (KK00025), Description (Clear Refuse Sacks 16 x 25 x 39 x 200), Product type (Hygiene services), Product category (Refuse Sacks), VAT (Select for override), and checkboxes for COSHH, Monitored product, Non stock, and Ad hoc. The 'Hygiene services' section includes an EWC code field (123/456), an Install product dropdown (Bin), and a Remove product dropdown (Distribution System for 25L vessel). The 'Units' section includes fields for Purchased as, Sold as, and Stocked as, each with a dropdown menu (Box 200) and a quantity field (1).

EQUIPMENT SETUP/TERMINATION

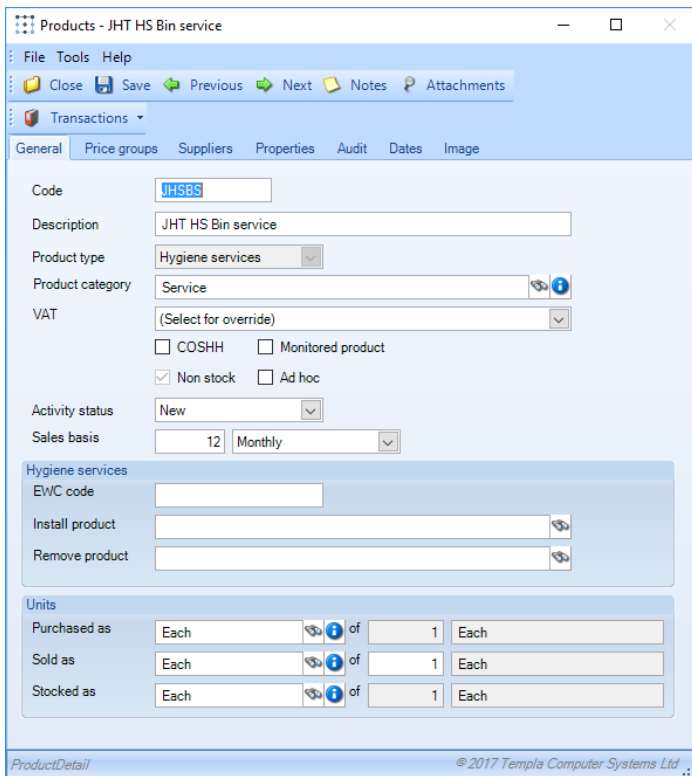
With new HS contracts, an initial scheduled service is often required to delivery and install equipment at a site prior to the first defined hygiene service. On contract termination, a final service may also be required to remove equipment. To facilitate this with TemplaCMS, when defining HS products an option 'Install' and 'Remove' product can be defined.

On contract HS definitions, where a products has either an install or removed product defined, TemplaCMS prompts whether these associated products should be automatically generated at the point service records are added/updated with an 'effective from/to' date respectively. If selected, a new HS record is automatically created as a once-only frequency for either the install or remove product, replicating all other details from the original service record, but allowing override. Where an install product is added, a further checkbox on the original service record for 'Await confirmation of install' is checked by default.

Where a workbill is generated within a workbill batch but relates to a service record checked as 'Await confirmation of install', the workbill is checked to ensure its linked 'install' HS workbill has been completed. If not, the workbill is highlighted within the batch with a new status or 'Await HS install', allowing it to be grouped. If both the install HS workbill and its related service record are in the same batch a warning message is issued to the user if any workbills are at this status. A user can therefore move the service record to a different day prior to posting the batch if required. If posted, the record will continue to show the status. This status is also visible on mobile.

PRODUCT SALES BASIS

The *Sales basis* option on existing **non-hygiene service type** products will default to '1 unit'. On **hygiene service type** products, the sales basis may be changed to a frequency count and basis, e.g. 1 month, to allow sales prices to be defined at a billing frequency. For example, servicing sanitary bins may be defined as costing £20.00 a month, whereby the actual frequency of servicing is irrelevant.



When entering HS products on to a contract:

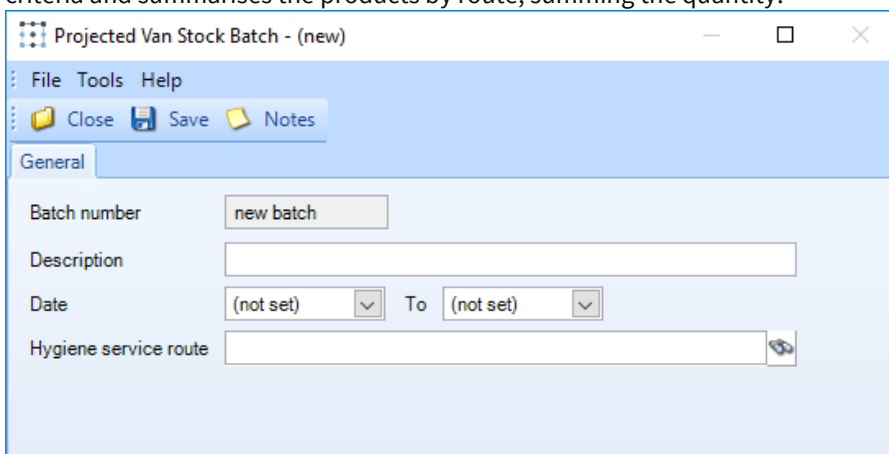
- If the sales basis is set as unit, the pricing will continue to work on a 'per unit/drop' basis', i.e. on a per unit per delivery basis taking the delivery frequency into consideration.
- If the sales basis is set as weekly, monthly or yearly, the delivery frequency is ignored and all prices entered for this product on price groups are treated accordingly (i.e. as the weekly, monthly or yearly prices) which are then adjusted to take the billing frequency into account, i.e. to handle an annual product price which is billed monthly or (vice-versa) a monthly price which is billed annually

When updating HS billing details, a warning is given if the invoice frequency does not correlate with the sales basis, e.g. if a weekly product is being invoiced monthly.

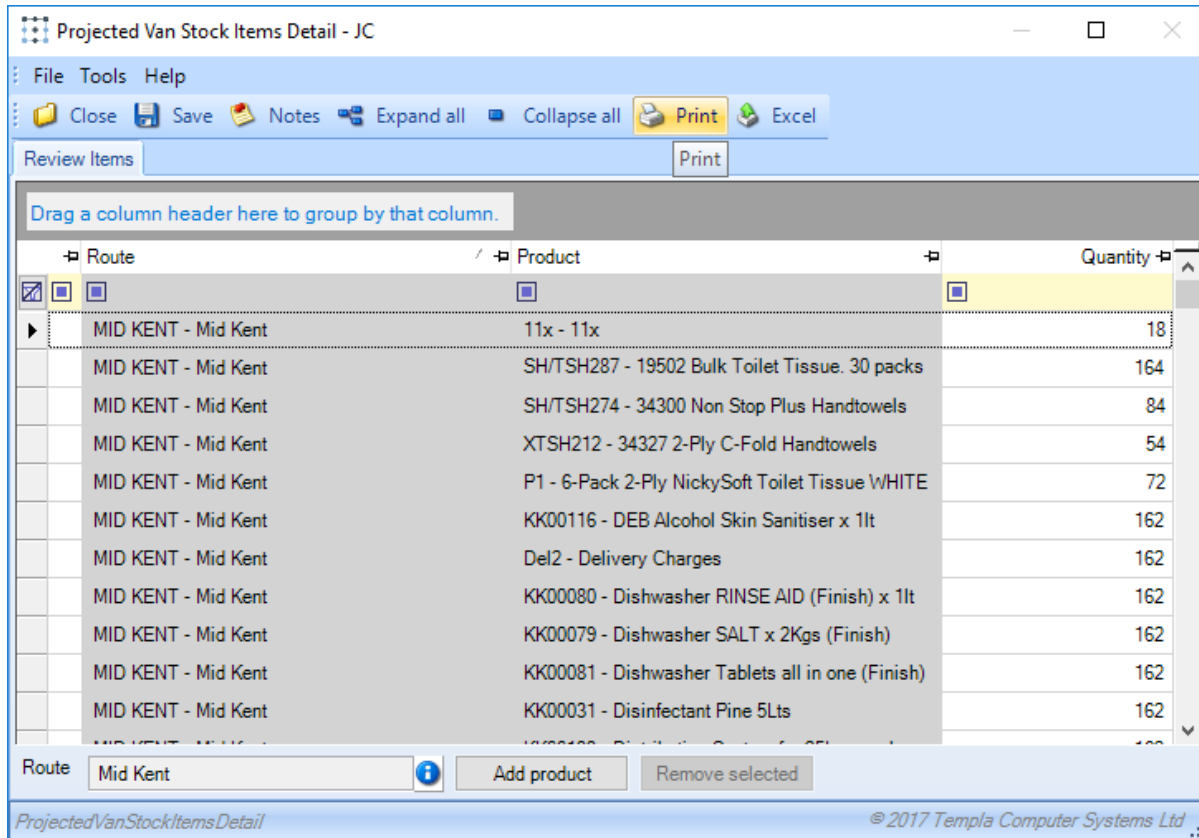
Projected Van Stock Batches

When performing hygiene servicing, the operator is required to know how much van stock they will require to complete new installations and regular servicing for their run.

The 'Projected Van Stock' option allows the creation of a Projected van stock batch with selection options of date range and an optional route. A batch generation process retrieves all generated hygiene service runs that fall within the selection criteria and summarises the products by route, summing the quantity.



The generated items may then be reviewed, adding or removing products as required and amending the quantities, though changes made in the batch will no mirror back to the underlying workbills. Drill down is available from each product/route to the substantiating runs.



For each hygiene service route, a site and contract must be defined with a site type of 'van'. When a route does not have a site defined, each batch item will show as being in error and the batch as a whole will not allow posting. Sites of stores type 'van' do not allow management of stock and therefore stock balances cannot be seen for vans.

Posting of the batch results in the creation of a separate transfer stores order for each route, dated with the batch selection's date from, allocated to the main warehouse for delivery to the specified route's site.

Device Registration

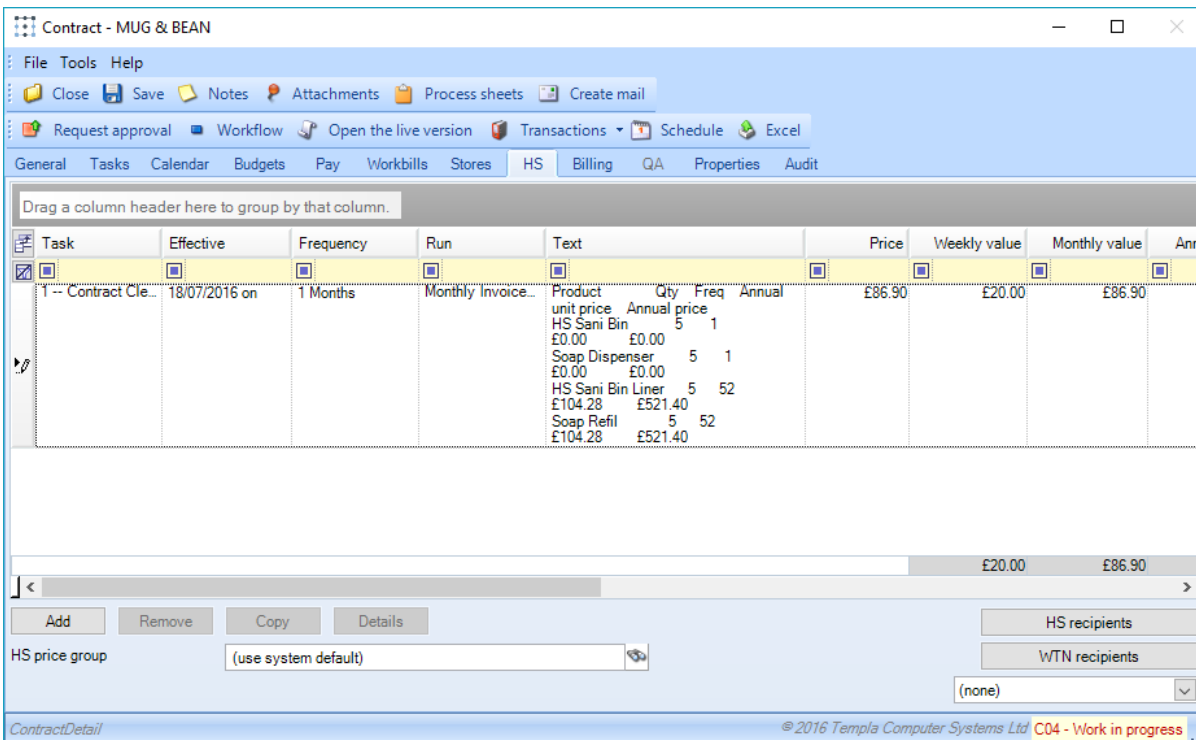
HS routes and workbills can be managed and completed on a mobile device, e.g. iPad or Android tablet. The configuration of TemplaCMS for mobile devices is covered in another document: **TemplaCMS Mobile Gateway**.

Workflow Paths

The 'HS delivery variations' workflow path routes any delivery variations between the planned and delivered HS details to appropriate users for action. Any HS workbills where comments exist will also be routed through the same workflow path.

HYGIENE SERVICES CONTRACT SETUP

When licensed for the Hygiene services module an additional 'HS' tab appears on the contract:



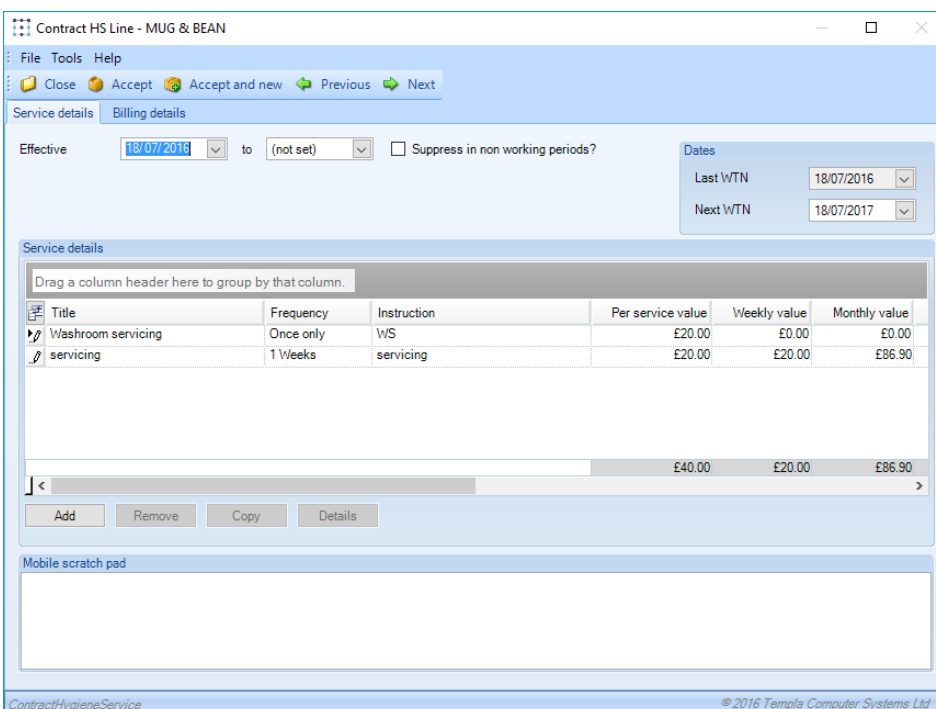
From this screen a service definition can be added comprising one or more of the Hygiene Services products.

HS price group – this is used for the calculation of billing from the service products. If not specified, the default from system control will be used.

HS email recipients – this is optional, recipients added here will automatically receive service confirmations via e-mail.

WTN recipients - recipients added here will automatically receive WTN's via e-mail.

To add a new Hygiene services definition to a contract, click on the 'Add' button, the following screen will appear:



Service Details

Effective from & to date – the date that the service will take effect from. The ‘to date’ is normally left blank unless it is known at the time of adding the service details.

Suppress in non-working periods – when ticked the service will be suppressed where non-working periods are defined on the calendar associated with the contract.

Last WTN date – last date a WTN was produced.

Next WTN date – next date a WTN will be generated.

WTN's can be generated by the HS based on the frequency required and the date specified here. **Note that on each revision to a HS definition the WTN date will be re-set to the effective date of the change, thus the WTN can be re-issued.**

Mobile scratch pad – this text field is for communication to the mobile device user about the service in general. Any notes entered here will be visible on the device but may also be changed on the device. In this way key information can be communicated to the driver, but the driver can then take ownership of the notes so that if another driver services the site they are given up to date details.

Multiple services can be defined on a single HS definition.

In order to build up the service details on the contract click on the Add button on the above screen which will display the following:

The screenshot shows the 'Contract HS Detail' window. The 'Title' field contains 'Washroom servicing'. The 'Work instruction' field contains 'Refill soap dispensers and remove and replace sani bins'. The 'Frequency' is set to '1 Months'. The 'Workbill type' is 'Hygiene services'. The 'Dates' section shows 'Last service date' as '18/07/2016' and 'Next service date' as '(not set)'. Below this is a table with columns for 'Route', 'Seq', 'Product', 'Qty', and 'Scratchpad'. The table lists 'Van A wk 3 Monday' with 'Seq' 1, and two products: 'Soap Dispenser' (Qty 5, 1 per floor) and 'HS Sani Bin' (Qty 5, 1 per floor). At the bottom, there are 'Add products' and 'Remove selected products' buttons.

Route	Seq	Product	Qty	Scratchpad
Van A wk 3 Monday	1			
	0	Soap Dispenser	5	1 per floor
	0	HS Sani Bin	5	1 per floor

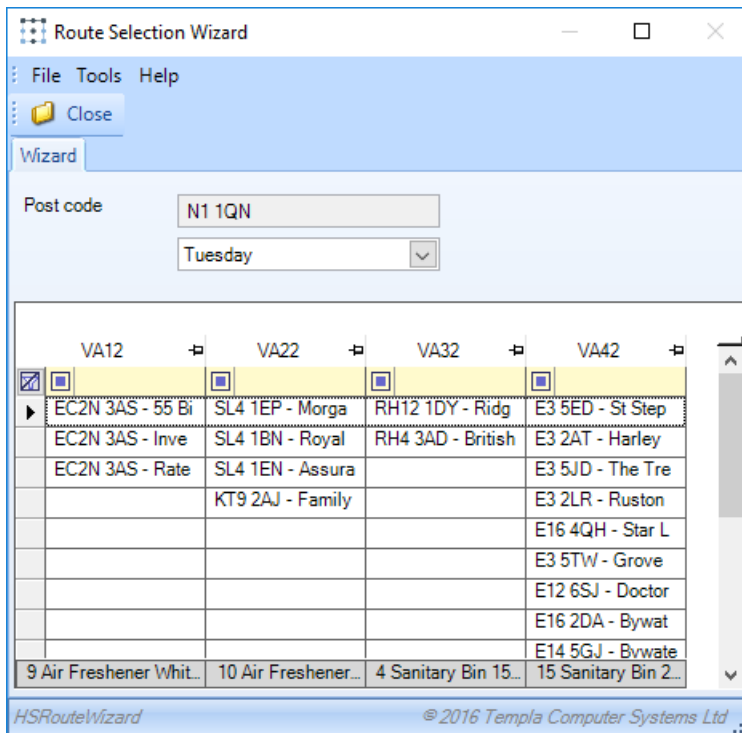
Title – enter the title of the service that will be delivered.

Work instruction – add details of the work to be carried out, this will print on the HS workbills.

Frequency – each service defines the frequency and ‘products’ that are being serviced. For products that require installation prior to their ongoing service, it is possible to define a frequency of ‘once only’.

Workbill type – the relevant **workbill type** should be selected.

Route – depending on the structure of routes defined (either specific or generic) it is possible that a single service may be assigned to different routes based on the relative frequencies. For this reason, the user may specify up to the defined number of routes (on system control). When assigning routes, the ‘**Wizard**’ button can be used to show a list of the defined routes with their contents, highlighting the alphabetically closest post codes to the contract site. A summary total of product quantities is displayed at the bottom of the screen so that overloading of routes can be avoided.



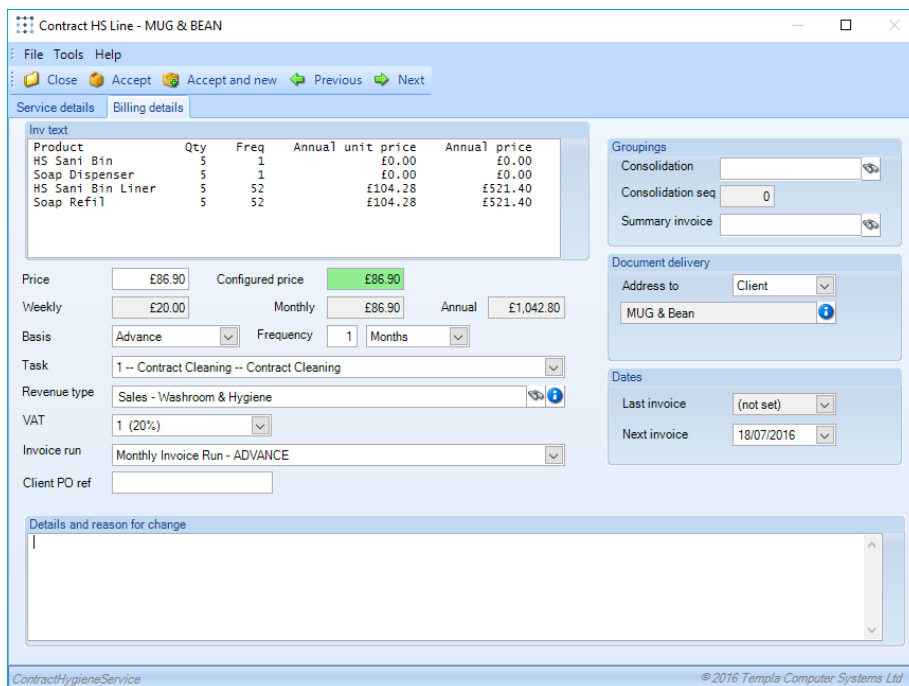
Last service date – this is the last date a service was carried out.

Next service date – the next date the service is due to be carried out.

Products – using the ‘Add products’ button one or more Hygiene Service products that make up the service can be added. The quantity of each product can be specified and scratchpad text can also be entered at product level.

Billing details

As the service products are built up by the user, the ***billing details are automatically built by the system.*** Unlike the services, a single HS definition comprises just a single billing definition.



The prices are calculated using the costs from the products and the appropriate HS price group from the contract or system control. This results in a standard formatted invoice text and value that the user is then free to change. As can be seen in the above example, the details defined here are very similar to a standard contract billing line.

HYGIENE SERVICES PROCESSING

WORKBILL BATCHES

In order to generate and manage HS workbills a **HS workbill batch** should be created either from the standard Workbill Batches option on the **Workbill menu** or from the **Workbill batches option on the Hygiene Services menu**.

On the Workbill Batch Details screen the user must either select the specific HS option, or 'all':

WORKBILL DETAILS

Workbills generated from contract HS, or indeed one-off workbills for a workbill type flagged as HS will display additional details:

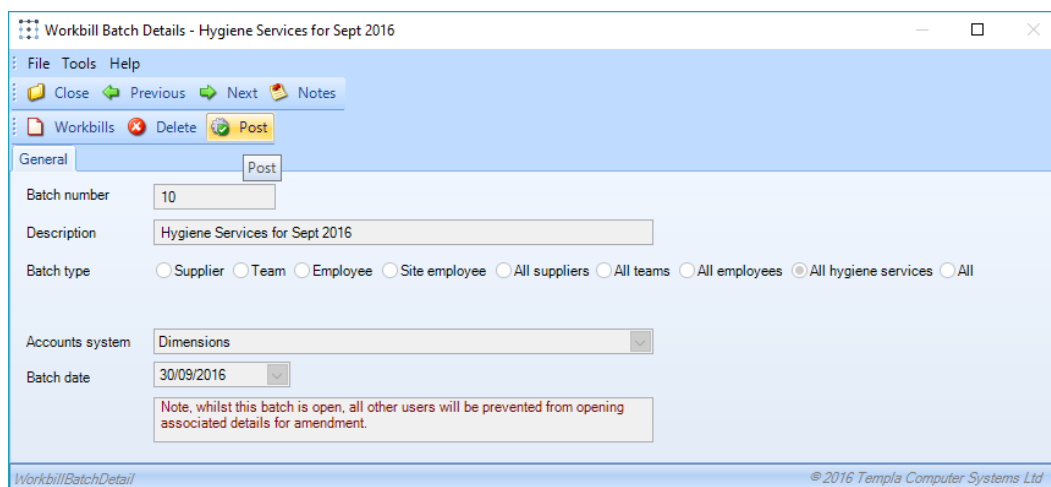
The **HS route**, **Route sequence** and **products** are picked up from the contract details.

A specific **Customer required date** is entered on a workbill. Where a run contains workbills with specific 'customer required' dates, it will be highlighted on the calendar view to indicate whether the run currently matches or is in conflict with the customer required dates of its constituent workbills.

As with contract HS, the creation of a one-off HS workbill will automatically populate the **invoice on confirmation** price using the HS price group defined on the contract. The user may override this price. Where the calculated price differs from the final price this will be highlighted, but not disallowed.

WORKBILL BATCH & ONE-OFF POST

Workbill batch posting results in the creation of committed workbills, as does the creation and posting of a one-off workbill.



For **HS workbills**, TemplaCMS checks for the existence of an **'active HS route' (a run)** relevant to the scheduled date of the workbill. Where one does not exist, it will be created using the frequency details defined on the master HS route. The HS workbill will then be added to the active HS route at the defined sequence.

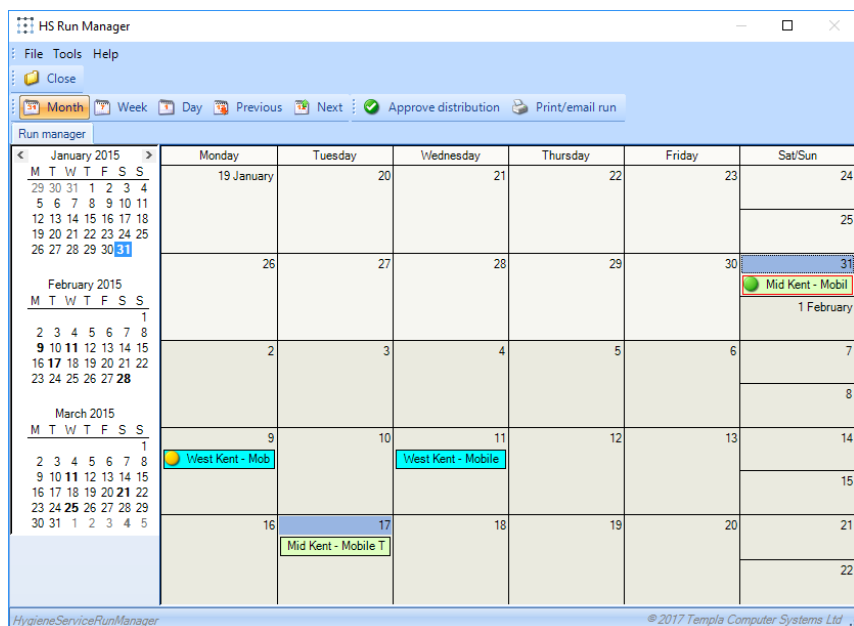
HS RUN SEQUENCING

HS runs are constructed as needed, and workbills added to them in the defined contract sequence. However, it is often the driver who understands the reality of sequencing their route rather than the admin staff. As such the mobile app (see later) allows for ad-hoc re-sequencing of sites within a run, and this information is fed back to the server with confirmation details. Where sequence feedback exists this will be used to override the actual sequence of each new run as it is constructed.

HS RUN MANAGER

The HS Run Manager accessible from the Hygiene Services menu allows the user an overview of the HS runs scheduled on specific dates. From here users can manipulate the runs as needed.

'HS Run Manager' shows a calendar with the colour-coded runs plotted into the relevant days of the month:



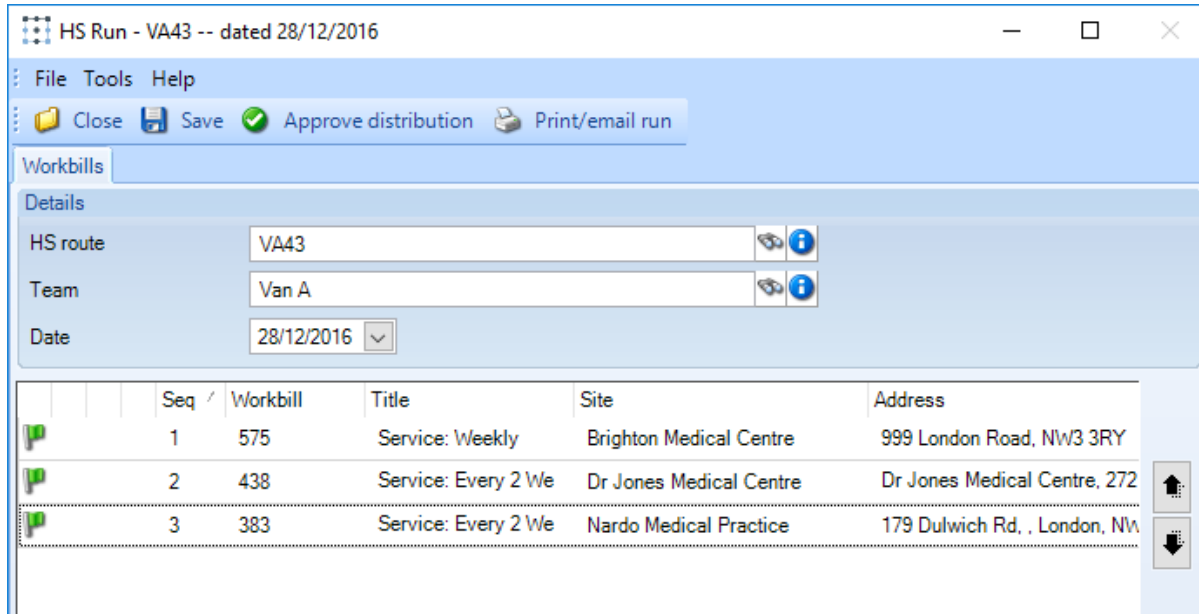
The colour icon on each hygiene service run indicates the completion status of the run, rolled up from individual workbills showing *green* for complete and *yellow* for partially complete. This status is also visible on mobile.

The user may drag and drop entire runs between dates on the calendar in order to achieve the required schedule.

Where a run contains workbills with specific '**customer required**' dates, it is highlighted on the calendar view whether the run currently matches or is in conflict with the customer required dates of its constituent workbills.

Any runs that haven't been distributed are indicated by the '**yellow triangle exclamation mark**' icon.

Double clicking a run opens it, showing the workbills in sequence:



When a new site is first added to a hygiene service run this is indicated by the green 'flag' icon.

From this window the user can:

- Re-schedule the run to another date
- Re-assign the run to another team
- Split the run into multiple parts, assigning workbills to each part and a different team and/or schedule date.
- Drag/drop workbills in order to re-sequence the run
- Drag/drop workbills between runs (by opening multiple runs side by side)

Any changes to runs will set them to a status of '**pending distribution**', and this is highlighted both on the calendar view, and within the active HS route. The user must specifically request that a run be distributed once they are happy with it.

Note: all changes to runs made within the 'HS Run Manager' will apply just to the runs themselves, and will have no impact on any subsequent instance of the same route in the future.

WORKBILL COMPLETION

Completion of a workbill in a run can be carried out in the normal way, or via the mobile device (see later).

When completing a HS workbill, additional fields are available to allow for the entry of confirmed **product quantities**, defaulting to the original quantities but allowing override.

The screenshot shows the 'Workbill Detail' window for a servicing workbill. The 'Details' section includes fields for Workbill number (348), Batch (10 -- Hygiene Services for Sept 2016), Workbill type (Hygiene services), Site (MUG & BEAN), Contract (MUG001 - MUG & BEAN), Client (MUG & Bean), and Task (1 -- Contract Cleaning -- Contract Cleaning). The Title is 'servicing'. Below this is a 'Contacts' section with 'Completion' and 'Acknowledgement' fields. The 'Work instruction' section shows 'Van A wk 4 Tuesday' and 'Route sequence 1'. A table lists products: Soap Refil (5) and HS Sani Bin Liner (5), both with a 'Delivered qty' of 5. A 'Service status' dropdown is set to 'Complete'. The footer shows '© 2016 Templa Computer Systems Ltd'.

On acceptance of the completion details, if any confirmed quantities differ, or if comments have been entered, the HS workbill is routed to workflow for **'HS variance approval'** (if a workflow path has been defined).

Furthermore, the employees that make up the team at the point of completion are recorded on the workbill. This is relevant when printing workbills.

Regardless of HS variance approval, if 'HS email recipients' exist on the contract, the new HS workbill printed document will be generated in PDF format and automatically emailed as an attachment to those in the list.

DELIVERY VARIATIONS

HS workbills may enter workflow where delivery variations or comments exist. As such the workbill will be routed to an appropriate user to approve and optionally action the variance.

The processing applicable depends on whether the HS workbill is 'invoice on confirmation' or not.

Invoice on confirmation HS workbills

Although the workbill has been confirmed, if it is in workflow for delivery variation it will not yet be available for invoicing. The user to whom the workbill is routed for approval will make a decision as to whether or not the agreed price of the workbill should be amended as a result of the variation. Any amendments will be carried out manually using the existing ability to amend posted workbills. Once the workbill has completed workflow it will become eligible for invoicing.

Non-invoice on confirmation HS workbills

These workbills will have their invoicing values defined on the contract HS definition, and it is likely that this will have been billed in advance, hence there is no opportunity to amend it. The user to whom the workbill is routed for approval will make a decision as to whether or not an additional charge or credit is appropriate. Using the existing functions, the workbill can then be amended to mark it as 'invoice on confirmation', with the price entered being the additional charge or credit to be applied. Once the workbill has completed workflow it will be eligible for invoicing if amended to require this.

INVOICE BATCHES

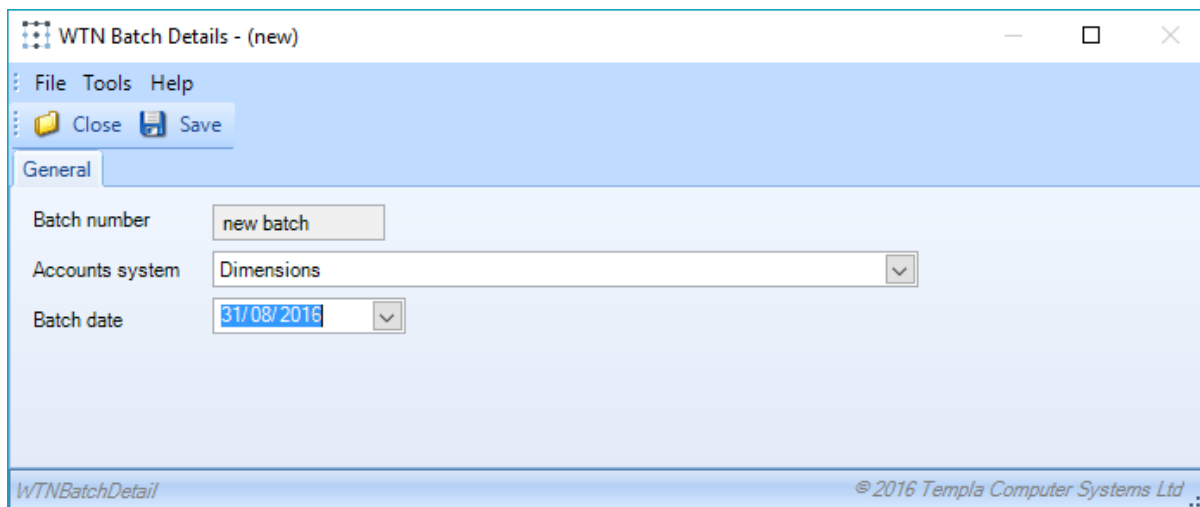
Invoices generated from contract HS definitions are handled identically to those generated from contract billing definitions – i.e. they may be grouped or summarised.

WASTE TRANSFER NOTES

A company handling offensive waste is required to comply with ‘duty of care’ procedures, annually issuing a ‘waster transfer note’ (WTN) to all sites from which they collect waste. Note that whilst a WTN is effective for a full year, any changes to the service may require that the WTN be re-issued.

WTN Batch

A WTN batch can be created from the **WTN Batch** option on the **Hygiene Services** menu by clicking on **New** and entering the relevant to date on the batch detail screen.



The screenshot shows a software window titled "WTN Batch Details - (new)". It features a menu bar with "File", "Tools", and "Help". Below the menu bar is a toolbar with "Close" and "Save" buttons. The main content area is labeled "General" and contains three input fields: "Batch number" with the text "new batch", "Accounts system" with a dropdown menu showing "Dimensions", and "Batch date" with a date picker showing "31/08/2016". The bottom of the window displays "WTNBatchDetail" on the left and "© 2016 Templa Computer Systems Ltd" on the right.

Click on **Save** to generate the batch details. The process will extract all contract HS definitions where the next WTN date is on or before the selected batch date.

The results of this are matched to the ‘HS recipients’ (already defined on the contract) to produce two distribution lists:

- WTNs that can be emailed
- WTNs that must be printed

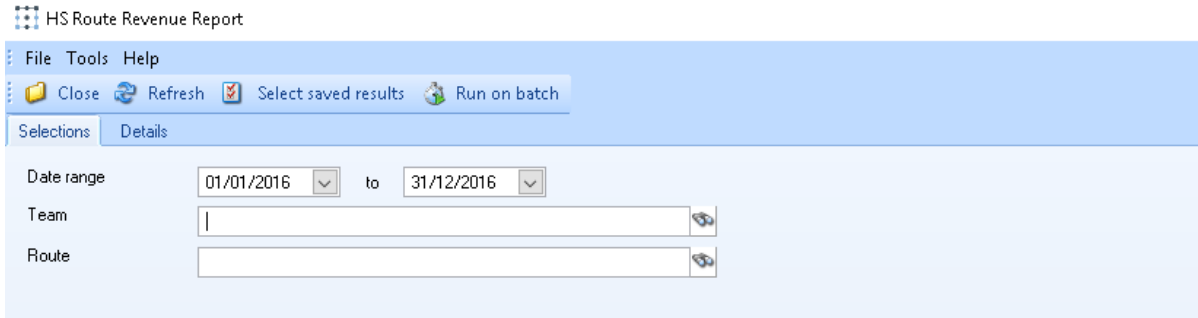
From here the user can print the WTNs on the ‘print’ list, and print or email those on the ‘email’ list. Whether emailed or printed, the WTN itself will be stored as an attachment on the site (using the attachment type defined on System Control) once distributed.

In common with other batch routines, posting the batch will advance the next WTN date on the contract, but only for those that were actually distributed.

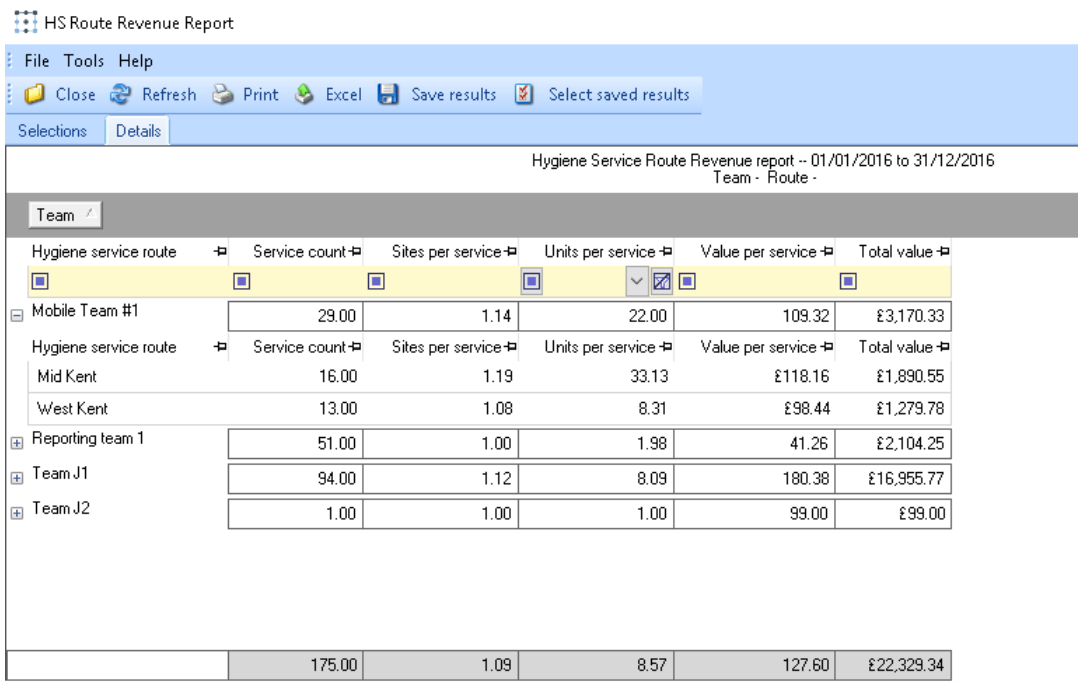
REPORTS

ROUTE REVENUE REPORT

The 'route revenue report' allows the following selections to be made:



On progression to the **Details** tab the report will extract both from existing workbills, and from contracted future workbills to project the figures for each route, displaying the results in a grid that can be sorted, grouped and exported.



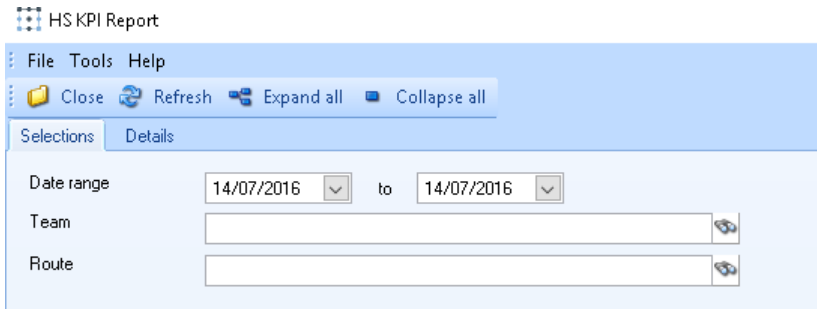
Depending on the selections made the generation of this report may take some time. For this reason, the '**run on batch**' toolbar button has been made available. When selected this will send the extraction of the report data to the batch processor, allowing the user to continue to work. Once generated the user will be alerted so that they can return to the report and load the results.

PRODUCT REVENUE REPORT

The 'product revenue report' is similar to the 'route revenue report', but summarized by HS product.

SERVICE KPI REPORT

The 'service KPI report' allows the following selections to be made:



On acceptance, the HS workbills relating to the selections will be extracted and shown in a grid automatically grouped by team:

Workbill number	Site	Scheduled date	Confirmed date	Service count	Scheduled units	Confirmed units	Compliance percentage	Status
Team J1 Summary								
57				450	360	80.00%		
Team J1 - J1								
7				56	38	67.86%		
Team J1 - J1 - J1								
14162	HSW001 - HSW001	28/04/2016 00:00	16/06/2016 00:00	1	14	14	100.00%	Complete
14171	HSW001 - HSW001	28/04/2016 00:00	12/07/2016 00:00	1	14	14	100.00%	Complete
14249	TEMPLA/001 - Templa Computer Systems Head Office	28/04/2016 00:00	03/06/2016 00:00	1	2	2	100.00%	Complete
14465	MURPH01/002 - The Green Man	01/04/2016 00:00	03/06/2016 00:00	1	4	4	100.00%	Complete
14466	MURPH01/002 - The Green Man	06/05/2016 00:00	03/06/2016 00:00	1	4	4	100.00%	Complete
14561	HSW001 - HSW001	18/06/2016 00:00	14/07/2016 16:19	1	9	0	0.00%	Missed
14565	HSW001 - HSW001	18/06/2016 00:00	14/07/2016 16:19	1	9	0	0.00%	Missed
Team J1 - J1 - J1 - J1								
5				12	10	83.33%		
Team J1 - J1 - J1 - J1 - J1								
4				10	10	100.00%		
57				450	360	80.00%		

MOBILE CMS

The HS module is the first to be delivered in the next generation of the Templa Mobile app. This has been designed to work on screens from full size tablets down to 5” phones. Whilst it is possible to operate on smaller screens, the layout is not optimised for this.

HS Deliveries

Where the mobile device registration is ticked to include HS, the 'HS deliveries' button will be available on the home screen of the TemplaMobile app. When pressed, this will access the list of runs split between 'to do' (the default) and 'all':



Selecting a run will access the sequenced list of sites in the run. Note that the runs are sequenced in date order, and an attempt to open a run that is not for the current date will warn the user, though they will be allowed to continue.

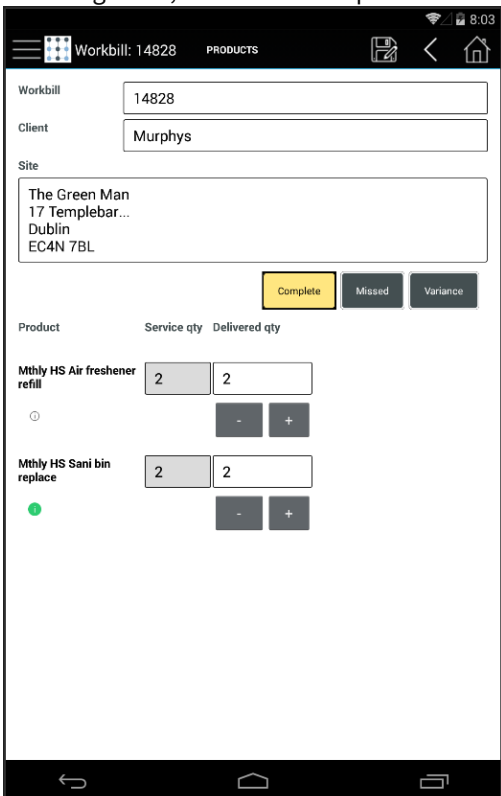


Each site is colour coded – red for incomplete, green for complete.

If the user selects a site out of sequence, they will be warned. If they confirm that they wish to process the site next, then the sites will be automatically re-sequenced.

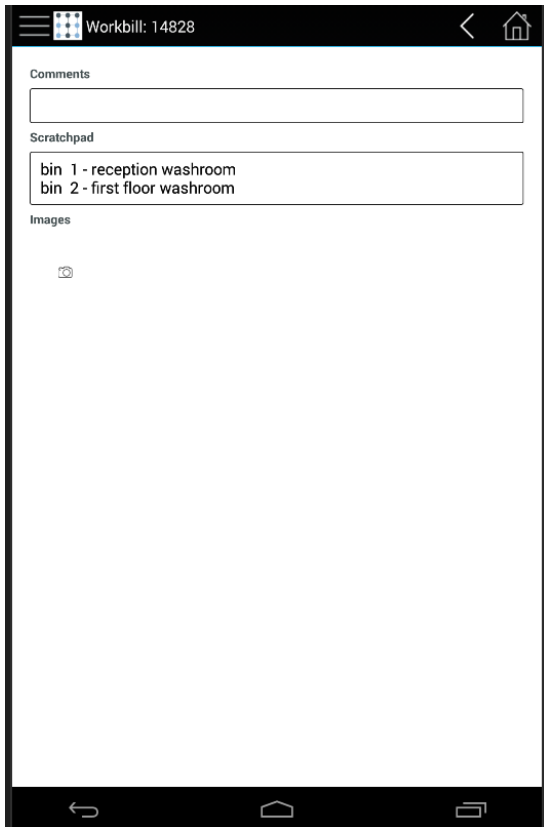
Note that user resequencing in this way will be fed back to the server and used as the preferred sequence next time the route is generated.

Selecting a site, the user will be presented with the details of the service for that site:



As a default, the planned service quantities will default into the delivered quantity, and the user is then free to increase/decrease as necessary, or indeed mark the entire service as **'missed'** using the service level button.

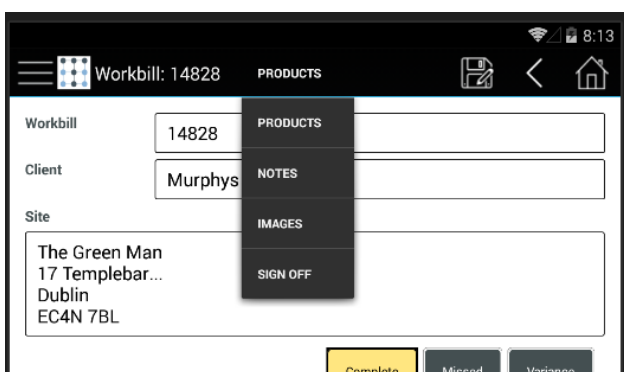
Below each product the **'information' icon** provides access to comments, scratchpad and images. When highlighted green, this indicates the presence of scratchpad text, when red comments or images. Tapping this icon will show the following view:



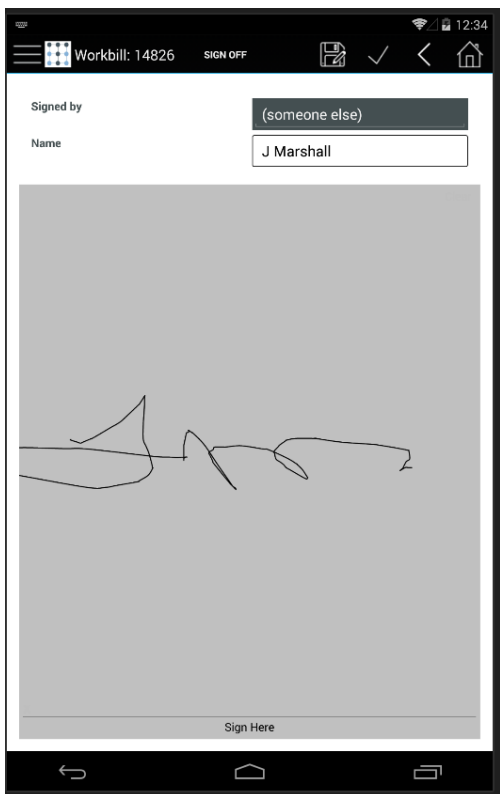
Tapping the **'camera' icon** will allow the user to take multiple pictures to be associated with this product on the service.

Entering comments, or taking photos will cause the service to be regarded as in variance on return to the server. Scratchpad text, on the other hand, is informational only, and whilst it may be originally sourced from the server, the device user is free to change this.

Access to service level (rather than product level) comments, scratchpad and images, including the work instruction is available from the tab list on the service details view:



Once all details have been completed, the service must be signed and marked as complete:



In doing so the user can identify who has signed for the service. Any site or client level contacts known to the system will be selectable from a drop down list, though the user can simply enter a name manually where the contact is not known.

Once signed, pressing the 'tick' on the toolbar will confirm the service, and automatically move the user on to the next sequential site on the route.

At this point, if the user is allowed to perform a 'partial synchronise' the confirmed details can be returned to the server. This can be done without the need to return to the 'home' screen, by pressing the 'menu' icon (top left) and selecting 'Synchronise':



On return to the server any email confirmations will be effected automatically.

CUSTOMER PORTAL

It is important to some clients that they have full information on the employees who are providing the HS delivery, in order to be assured of their security checks, etc. (i.e. user defined properties). Full information on employees, including UDPs and training is already available on the Customer Portal via the contract details, including full details of all employees that are currently either assigned to teams that service the site, or that have been stamped on a completed workbill as a team member at the time the workbill was confirmed.

From the workbill section of Customer Portal the HS workbill document can be viewed (as a PDF), and as detailed above this will contain the list of employees who make up the team. Thus, it is possible for the client user to view all the necessary information.



TEAM Software develops market-leading solutions for companies with distributed workforces. TEAM has a focus on the cleaning and security industries helping the companies who serve these sectors manage and optimise their business; from front line service delivery to back office financial management. TEAM's technology is designed to help improve productivity, employee engagement and profitability, and at the same time help control cost, risk and compliance. For more information, visit teamsoftware.com.