

Hygiene Services TEMPLACMS

Version: v.6.0.0 (August 2017)



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:

Navigator #	Alerts HS routes								
Hygiene Services	HS routes								
Workbill batches	Deservatives have been des	have to serve by the task one							
 Avglene Service Runs Service KPI Report 	Projectional near group by an coronal.								
Route Revenue Report	曾 St Code	Description	Team						
Product Revenue Report									
 Hygiene Service Routes 	► A1FRI	Van Awk 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 Awk 4 Tuesday	HSVA - HS van A						
Contract Admin	A4WED	Van A wk 4 Wednesday	HSVA - HS van A						
Payroll	B1FRI	Van B wk 1 Friday	HSVB - HS van B						
Billing	B1MON	Van B wk 1 Monday	HSVB - HS van B						
Transaction Register	B1THU	Van B wk 1 Thursday	HSVB - HS van B						
Stores	BITUE	Van B wk 1 Tuesday	HSVB - HS van B						
Reports	B1WED	Van B wk 1 Wednesday	HSVB - HS van B						
Period/Year End	B2FRI	Van B wk 2 Friday	HSVB - HS van B						
Maintenance	B2MON	Van B wk 2 Monday	HSVB - HS van B						
Service Point	B2THU	Van B wk 2 Thursday	HSVB - HS van B						
Hygiene Services									
System Admin	Direct access								

System Control - Hygiene Services

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

System Control - Hygiene	Services		— 🗆	\times
File Tools Help				
🥥 Close 🛃 Save				
HS				
Default price group	HS Price List		1	
Maximum routes per service	4			
Billing defaults				
Basis	Advance 🗸	Frequency 1	Months 🗸	
Billing level	Product 🗸			
Default inv text prefix				
SP From &DF to &DT				
Frequency	1 Years	~		
Company signatory name	Nick			
SIC code	81210			
Waste license number	CBDU127748			
Attachment type	Waste Transfor Motor		∞ 🔒	
SystemControl_HygieneServices		© 2016 1	Templa Computer Syste	ms 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 form *System Control*.

System Control - System Setup - 🗆 🗙								
File Tools Help								
General Business analysis levels Passwords Frequen	cy colours Email preferences Lic	ense						
Document type	Subject	Body	^					
QA form manual e-mail	QA for &SN month &QY/&QM	The requested quality audit forms are attached						
Self billing invoice manual e-mail	Self billing Invoice(s)	Please see the attached self billing invoice(s)						
Stores order picking list manual e-mail	Picking list	Please find the attached picking list						
Stores order delivery note manual e-mail	Delivery Note	Please find the attached deilvery note						
Stores order supplier order manual e-mail	Stores order	Please see the attached stores order						
Stores order client confirmation manual e-mail	Stores order	Please see the attached stores order						
Stores order request manual e-mail	Stores order requests	The requested stores order requests are						
Timesheet manual e-mail	Timesheet(s)	The requested site timesheets are attached						
Training form manual e-mail	Training forms	The requested training forms are attached						
Workbill manual e-mail	Workbill(s)	The requested workbill(s) are attached						
Workbill quote manual e-mail	Workbill quote(s)	The requested workbill quote(s) are attached	,					
HS workbill manual e-mail	HS workbill(s)	The requested HS workbill(s) are attached						
Paysheets	Please see the attached paysheet	Please see the attached paysheet						
QA completed item failures	Quality Audit failures	Please find attached a list of new failures						
ΩΔ form auto e-mail completion	OA for &SN month &QY/&QM	Please find attached the results of the Quality	*					
SystemControl_SystemSetup		© 2017 Templa Computer Systems Ltd	1					

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.

Navigator 4	Alerts HS routes					
Hygiene Services	HS routes					
Workbill batches Hygiene Service Runs MUN Ratches	Drag a column header here to group by that column.					
 Service KPI Report 	🚰 St Code	Description	Team			
Route Revenue Report						
Product Revenue Report	► A1FRI	Van A wk 1 Friday	HSVA - HS van A			
 Hygiene Service Routes 	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			
Favourites	A4TUE	Van A wk 4 Tuesday	HSVA - HS van A			
Contract Admin	A4WED	Van A wk 4 Wednesday	HSVA - HS van A			
Workhills	B1FRI	Van B wk 1 Friday	HSVB - HS van B			
Billing	B1MON	Van B wk 1 Monday	HSVB - HS van B			
Transaction Register	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	_ D X
File Tools Help 💋 Close 🛃 Save 🗇 Previous 📫 Next		
General Snapshot Dates		
General Code AG FRI 2		
Description AG Fri 2		
Team HS - AG	Sector 2010	
Site	Ø	
Colour 223, 255, 19 🗸		
Start date 18/08/2017 🗸		
Schedule		
Frequency 4 Weekly V		
Mon 🗌 Tue 🗌 Wea	I Thu Fri 🗹 Sat [Sun
HygieneServiceRouteDetail	©2	2017 Templa Computer Systems Ltd

Document Ref: TEAM TemplaCMS - Hygiene Services.docx Version: © Copyright 2021 TEAM Software by WorkWave 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*.

Navigator #	Alerts HS routes Teams
Maintenance	Teams
User Access/Security User Access/Security User Business Structure Payroll Payroll Pay Types Extra Types Pay Scales Absence Reasons Site Approval Reasons Site Approval Reasons Holiday Methods Employee Work Types Teams Pensions Payroll Pensions Pensi	Prag a column header here to group by that column. Image: State Column header here to group by that column. Image: State Column header here to group by that column. Image: DC Deep Cleaning Team Image: DC Deep Cleaning Team Image: DC Deep Cleaning Team Image: HSVA HS van A HSVB HS van B HSVC HS van C HSVD HS van D WIN Window Cleaning Team
Contract Admin	
Payroll	
Workbills	
Billing	
Transaction Register	
Stores	
Reports	
Period/Year End	
Maintenance	

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	110374			
Lode	пэуд			
Description	HS van A			
HS user	John Smith		⑦	

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.



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

Workbill Type Details - H	lygiene services	-		\times
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 Comput	ter Systen	s 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 an	d new Notes 👂 Attachmer	nts 🃋 Process sheets 🔃	Create mail
🔒 🔒 Default details 🧃 Transacti	ons 🔻		
General Properties Business an	alysis Marketing analysis Conta	cts Time and attendance	Stores ordering
Client	Test v6		D 🖸 🖉
Code	MUG001	Current	\sim
Name	Mugg & Bean		
Address	159 London Road		
Town	Sevenoaks		
County	Kent		\sim
Postcode	TN13 3UE	DBS check required?	
Working/cleaning weeks per year	52.14	Vetting required?	
Internal stores	No	PPE required?	to constituted?
Site type	Standard 🗸	Pood hygiene certifica	te required?
Default mailing contact	(not set)		~
I imesheet entry style	Default method		\sim
	Managed building?		
Building reference			
SIC code	SIC123456		

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 4	A	Verts Produc	ct List									
Maintenance	Р	roduct List										
User Access/Security Susiness Structure Budgets Budgets		Product group	p / Product c	ategory /	COS	SHH	Purchased as	Sold as	Stocked as	Status	Part no.	
Purchasing Suppliers Sroducts	*	B Product group : AU HUC : I LeMS (1 Item) Product group : BINS - Bins (2 Items) Product group : CLEAN EQUIP - Cleaning Equipment Products (5 Items)										
 Products Product Groups Product Categories 	•	B Product group : CLEANING - Cleaning Products (2 items) B Product group : DELUCERY - Delivery Charges (1 item) D D D D D D D D D D D D D D D D D D D										
 Product Structure Purchase Types 		Product ca	tegory : HS - Hyg	ene services (13 items)								
Price Groups		D	СМ	Dust Control Mats	C		EACH	EACH	EACH	New		
 Stores Template Review 		FI	HB	Feminine Hygiene Bin			EACH	EACH	EACH	New		
 Stores Template Product Review Units 		H	SB	HS Sani Bin			EACH	EACH	EACH	New		
🗉 😋 Equipment		H	SSBL	HS Sani Bin Liner			EACH	EACH	EACH	New		
Spend Limits Review		M	WCS	Medical Waste Collection Service			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.

Products - Clear Refuse Sacks 16 x 25 x 39 x 200	- 🗆 ×
File Tools Help	
😳 💭 Close 🛃 Save 💠 Previous 🔿 Next 🔼 Notes	Attachments
🧊 Transactions 🔹	
General Price groups Suppliers Properties Audit Da	ites Image
Code KK00025	
Description Clear Refuse Sacks 16 x 25 x 39 x 200	
Product type Hygiene services	
Product category Refuse Sacks	<i>∞</i> (1
VAT (Select for override)	
COSHH Monitored product	
Non stock Ad hoc	
Activity status	
Sales basis	
EWC code 122//56	
Bin	8 0 🗸
Remove product Distribution System for 25L vessel	Ø 🚺 💋
Linite	
Purchased as Box 200	1 Box 200
Sold as	1 0.000
Box 200 Gi	I Box 200
Stocked as Box 200 01	1 Box 200
ProductDetail	© 2017 Templa Computer Systems Ltd

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 definiations, 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 messaged 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.

Products - JHT H	S Bin service			-		\times
File Tools Help						
😳 💭 Close 🔡 Save	e 🗇 Previous 🖬	🕨 Next 🚺 Notes	₽ Attachment	s		
🧊 Transactions 🝷				_		
General Price group	ps Suppliers P	roperties Audit D	ates Image			
		7				
Code	JHSBS					
Description	JHT HS Bin service	e .				
Product type	Hygiene services	\sim				
Product category	Service			∞		
VAT	(Select for overrid	e)		~		
	сознн	Monitored product				
	Non stock	Ad hoc				
Activity status	New					
Sales basis	12 14-1		1			
	I2 Mont	niy 🗠				
EWC code						
lastell seedust						
instan product				100		
Remove product				S.		
Units						
Purchased as	Each	🖘 🚺 of	1 Each			
Sold as	Each	≪ 5 0 f	1 Each			
Stocked as	Each	≪s 🚹 of	1 Each			
		-				
ProductDetail			© 2017	Templa Compu	ter Syster	ns Ltd

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 <u>delivery</u> 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.

Projected Van Stock	Batch - (new	/)				_		\times
File Tools Help								
🗧 💋 Close 🛃 Save	🗘 Notes							
General								
Batch number	new batch							
Description								
Date	(not set)	\sim	То	(not set)	\sim			
Hygiene service route							Ś	

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.

Pro	ojected Van Stock Items Detail - JC		_	
E File	Tools Help			
i 💋 c	lose 🛃 Save 🤔 Notes 📲 Expand all	Collapse all Print Second Excel		
Review	/ Items	Print		
Drag	a column header here to group by that colun	ın.		
-12	Route	- Product -	•	Quantity +
►	MID KENT - Mid Kent	11x - 11x		18
	MID KENT - Mid Kent	SH/TSH287 - 19502 Bulk Toilet Tissue. 30 packs		164
	MID KENT - Mid Kent	SH/TSH274 - 34300 Non Stop Plus Handtowels		84
	MID KENT - Mid Kent	XTSH212 - 34327 2-Ply C-Fold Handtowels		54
	MID KENT - Mid Kent	P1 - 6-Pack 2-Ply NickySoft Toilet Tissue WHITE		72
	MID KENT - Mid Kent	KK00116 - DEB Alcohol Skin Sanitiser x 1lt		162
	MID KENT - Mid Kent	Del2 - Delivery Charges		162
	MID KENT - Mid Kent	KK00080 - Dishwasher RINSE AID (Finish) x 1lt		162
	MID KENT - Mid Kent	KK00079 - Dishwasher SALT x 2Kgs (Finish)		162
	MID KENT - Mid Kent	KK00081 - Dishwasher Tablets all in one (Finish)		162
	MID KENT - Mid Kent	KK00031 - Disinfectant Pine 5Lts		162
		14/20100 51 11 11 0 1 1 0 01		¥
Route	Mid Kent 🕄	Add product Remove selected		
Projecte	dVanStockItemsDetail	© 2017	Templa Compu	ter Systems Ltd

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:

Contract - MUG 8	& BEAN						- 🗆	\times		
File Tools Help	File Tools Help 🧭 Close 🚽 Save 🏷 Notes 👂 Attachments 📋 Process sheets 🔃 Create mail									
📴 Request approv	al 😐 Workflow	Open the live	e version 🧯 Tra	nsactions 🝷 🛅 Schedule 🔌 Excel						
General Tasks C	alendar Budgets	Pay Workbi	lls Stores HS	Billing QA Properties Au	ıdit					
Drag a column hea	der here to group b	by that column.								
🛃 Task	Effective	Frequency	Run	Text	Price	Weekly value	Monthly value	Anr		
1 Contract Cle	18/07/2016 on	1 Months	Monthly Invoice	Product Qty Freq Annual unit price Annual price HS Sani Bin 5 1 £0.00 \$5000 \$5000 \$5000 \$5000 \$5000 \$5000 \$5000 \$5000 \$5000 \$50000 \$5000 \$5000 \$5000 \$51140 \$5000 \$52140 \$5000 \$5000 \$521140 \$521140 \$521140 \$521140 \$521140 \$5000 <th>£86.90</th> <th>£20.00</th> <th>£86.90</th> <th></th>	£86.90	£20.00	£86.90			
1						£20.00	£86.90			
_										
Add Rei	Add Remove Copy Details HS recipients									
HS price group	HS price group (use system default) 🔊									
						(none)		~		
ContractDetail				02	2016 Templa Com	nputer Systems Ltd	C04 - Work in pro	gress		

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:

File Tools Help Close Accept @ Accept and new Previous Next Service details Effective Effective Effective Effective Core details Title Frequency Frequency Instruction Per service value Weekty value Monthly value Monthly value Add Remove Mobile scratch pad Mobile scratch pad	Contract HS Line - MUG & BEAN	I				- 🗆	\times
Close	File Tools Help						
Service details Effective	🥥 Close 🍏 Accept 🌀 Accep	t and new 🛛 💠 Previou	is 🔷 Next				
Effective to (not set) Cupress in non working periods?	Service details Billing details						
Last WTN 18/07/2016 Next WTN 18/07/2017 Service details I'rig a column header here to group by that column. Title Frequency Instruction Per service value Weekly value Monthly value Vashroom servicing Once only V/S £20.00 £0.00<	Effective 18/07/2016	to (not set)	Suppress in non working periods?	Dates			
Next WTN 18/07/2017 Service details Image: Comparison of the service of				Last	WTN	18/07/2016	\sim
Service details Integration of the service of				Next	t WTN	18/07/2017	~
Trag a column header here to group by that column. Image: Title Frequency Instruction Per service value Weekly value Monthly value Image: Weekly value Once only WS £20.00 £0.00 £0.00 Image: Weekly value Once only WS £20.00 £0.00 £0.00 Image: Weekly value Monthly value Servicing £20.00 £86.90 Image: Weekly value Keekly value Keekly value Keekly value Keekly value Image: Weekly value Monthly value Keekly value Keekly value Keekly value Keekly value Image: Weekly value Monthly value Keekly value Ke	Service details						
End of the experiment of the solution of the experiment of the experime	Drag a column header here to g	roup by that column					
Internet			[] []				
Index control of realing Unce only Unce only <td>Ittle Mashroom servicing</td> <td>Prequency Once only</td> <td>Instruction</td> <td>Per service value</td> <td>Weekly value</td> <td>Monthly</td> <td>ralue</td>	Ittle Mashroom servicing	Prequency Once only	Instruction	Per service value	Weekly value	Monthly	ralue
£40.00 £20.00 £86.90 Add Remove Copy Details Mobile scratch pad	/ servicing	1 Weeks	servicina	£20.00	£20.00	£	86.90
Add Remove Copy Details Mobile scratch pad Particular Service 2016 Templa Computer Systems Ltd				£40.00	£20.00		00 38
Add Remove Copy Details Mobile scratch pad	<			240.00	220.00	-	>
Mobile scratch pad	Add Remove	Copy Details					
Datrachtvriene Service © 2016 Templa Computer Systems Ltd	Mobile scratch pad						
DatrachtvrieneService © 2016 Templa Computer Systems Ltd							
DatrachtvaieneService © 2016 Templa Computer Systems Ltd							
antrachthraiene Service © 2016 Templa Computer Systems Ltd							
ContractHynieneService @2016 Templa Computer Systems Ltd							
	ContractHvaieneService				© 2016 Templa (Computer Svs	tems I td

Service Details

Effective from & to date – the date that the service will take effect from. The 'to date' is normally left blank un-less it is known at the time of adding the service details.

Supress in non-working periods – when ticked the service will be supressed 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 wil 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:

Contract HS Detail			- [) ×
File Tools Help				
🥥 Close 🌖 Accept 🌀 Accept and new 💠 Previous 🛸 Next				
Details				
Title Washroom servicing				
Work instruction				
Refill soap dispensers and remove and replace sani bins				
Frequency 1 Months Dates				
Workhill type	18/07/2	2016	~	
Hygiene services Next service date	(not se	et)	~	
Deute Car Deutert	5	01-1		
Van Awk 3 Monday 1		Uty :	Scratchpa	
Soap Dispenser		5	1 per floor	r
B HS Sani Bin		5	1 per floor	r
0				
15				>
Add products Remove selected products				
	@ 2010 T	T ((-)		
ContractnygieneserviceDetail	© 2016 1	empia Co	omputer S	ystems Ltd

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.

Route Selection V	Vizard			
File Tools Help				
📁 💭 Close				
Wizard				
Post code N	1 1QN			
Т	uesday	\sim		
VA12 +	vA22 +⊐	VA32 +=	VA42	₽ ~
EC2N 3AS - 55 Bi	SL4 1EP - Morga	RH12 1DY - Ridg	E3 5ED - St	Step
EC2N 3AS - Inve	SL4 1BN - Royal	RH4 3AD - British	E3 2AT - Ha	rley
EC2N 3AS - Rate	SL4 1EN - Assura		E3 5JD - The	e Tre
	KT9 2AJ - Family		E3 2LR - Ru	ston
			E16 4QH - S	tar L
			E3 5TW - Gr	ove
			E12 6SJ - Do	octor
			E16 2DA - B	ywat
	<u> </u>		E14 5GJ - B	vwate
9 Air Freshener Whit	10 Air Freshener	4 Sanitary Bin 15	15 Sanitary	Bin 2 🗸 🗸
HSRouteWizard		© 2016 Tem;	pla Computer S	Systems Ltd

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.

Contract HS	Line - MUG & BEAN		—	
File Tools He	łp			
🕴 💋 Close 🍏	Accept 🌀 Accept and new 💠 Previous 📫 Next			
Service details	Billing details			
Inv text				
Product	Qty Freq Annual unit price Annual price	Groupings		
Soap Disper	nser 5 1 £0.00 £0.00	Consolidation		3
HS Sani Bi Soap Refil	h Liner 5 52 f104.28 f521.40 5 52 f104.28 f521.40	Consolidation seq	0	
		Summary invoice		90
		Document delivery		
Price	£86.90 Configured price £86.90	Address to	Client 🗸	
Weekly	£20.00 Monthly £86.90 Annual £1,042.80	MUG & Bean	0	
Basis	Advance V Frequency 1 Months V			
Task	1 Contract Cleaning Contract Cleaning	Dates		
Revenue type	Sales - Washroom & Hygiene	Lastinusias	(reter)	
VAT	1 (20%)	Last invoice	(not set)	
Invoice run		Next invoice	18/07/2016 🗸	
invoice run	Monthly Invoice Run - ADVANCE			
Client PO ref				
Details and rea	son for change			
ľ				
				~
C. C				
ContractHygieneS	ervice	© 20	16 Templa Computer S	Systems Ltd

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 Batch Details - (new) File Tools Help Close Save Notes General Batch number new batch Description Hygiene services for Sept 2016 Batch type OSupplier OTeam Employee Site employee All teams All hygiene services All Patch date 19/08/2016 Note. Note. Note. Note. Description			
File Tools Help Image: Close Save Notes General Batch number new batch Description Hygiene services for Sept 2016 Batch type O Supplier O Team O Employee O Site employee O All suppliers O All teams O All employees @ All hygiene services O All Accounts system Dimensions Batch date 19/08/2016 Note, to post or delete this batch you must first apply the lock	Workbill Batch [Details - (new) —	\times
Close Save Notes General Batch number new batch Description Hygiene services for Sept 2016 Batch type O Supplier O Team O Supplier O Team Employee Accounts system Dimensions Batch date 19/08/2016 Vote. to post or delete this batch you must first apply the lock	File Tools Help		
General Batch number Description Hygiene services for Sept 2016 Batch type O Supplier	🛛 📁 Close 🛃 Sa	ve 🗘 Notes	
Batch number new batch Description Hygiene services for Sept 2016 Batch type O Supplier O Team O Employee O Site employee O All suppliers O All teams O All employees @ All hygiene services O All Accounts system Dimensions Batch date 19/08/2016 Image: Note, to post or delete this batch you must first apply the lock	General		
Description Hygiene services for Sept 2016 Batch type Osupplier OTeam OEmployee OSite employee OAll suppliers OAll teams OAll employees @All hygiene services OAll Accounts system Dimensions Batch date 1908/2016 <	Batch number	new batch	
Batch type Osupplier Team Employee Osite employee All suppliers All teams All employees In hygiene services All Accounts system Dimensions Image: Constraint of the services Image: Cons	Description	Hygiene services for Sept 2016	
Accounts system Dimensions	Batch type	OSupplier OTeam OEmployee OSite employee OAII suppliers OAII teams OAII employees @AII hygiene services OAII	
Accounts system Dimensions Batch date 19/08/2016 Note, to post or delete this batch you must first apply the lock			
Accounts system Dimensions			
Batch date 1908/2016 Note, to post or delete this batch you must first apply the lock	Accounts system	Dimensions	
Note, to post or delete this batch you must first apply the lock	Batch date	19/08/2016	
		Note, to post or delete this batch you must first apply the lock	
WorkbillBatchDetail @ 2016 Templa Computer Systems Ltd .	WorkbillBatchDetail	© 2016 Templa Computer Systems	Ltd :

WORKBILL DETAILS

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

Workbill Detail - s	ervicing for MUG & BEAN dated 29/08/2016 —	\times
File Tools Help	•	
🛛 💭 Close 🛃 Save	🗇 Previous 🛸 Next 💭 Notes 👂 Attachments 🍰 Print/email workbill 🍕 Cancel work	
· Morkbill employ	ree pay 🔐 Amend 😥 Actual costs	
Workbill Dates		
Details		
Workbill number	323	
Batch	8 LB test	
Workbill type	Hygiene services 0	
Site	MUG & BEAN	
Contract	MUG001 - MUG & BEAN	
Client	MUG & Bean O	
Task	1 Contract Cleaning Contract Cleaning	
Title	servicing	
Contacts		
Completion		
Acknowledgement		
Work instruction S	cheduling HS Price Completion(s)	_
HS route 🔗 V	an Awk 1 Monday Route sequence 1 Customer required date	
Product		ąty
Soap Refil	5	5
HS Sani Bi	h Liner 5	2
	Service status Complete	~
Add products	Remove selected products	
WorkbillDetail	© 2016 Templa Computer Systems Ltd WB05 - Awaiting complet	on

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.

Workbill Batch E	Petails - Hygiene Services for Sept 2016			\times
File Tools Help				
🔅 💋 Close 💠 Pre	wious 📫 Next 💈 Notes			
🗋 Workbills 🔇	Delete 😧 Post			
General	Post			
Batch number	10			
Description	Hygiene Services for Sept 2016			
Batch type	Supplier Team Employee Site employee All suppliers All teams All employees All hygiene se	rvices ()	AII	
Accounts system	Dimensions			
Batch date	30/09/2016			
	Note, whilst this batch is open, all other users will be prevented from opening associated details for amendment.			
WorkbillBatchDetail	© 2016 Templ	a Comput	ter Syster	ns Ltd

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:

HS Run Manager						- 🗆 ×						
File Tools Help												
🥥 Close												
📴 Month 🝸 Week 💽 Day 🗿 Previous 🗿 Next 🤅 🖉 Approve distribution 😂 Print/email run												
Run manager												
< January 2015 >	Monday	Tuesday	Wednesday	Thursday	Friday	Sat/Sun						
M T W T F S S 29 30 31 1 2 3 4	19 January	20	21	22	23	24						
5 6 7 8 9 10 11												
12 13 14 15 16 17 18						25						
26 27 28 29 30 31												
	26	27	28	29	30	31						
February 2015 M T W T F S S						Mid Kent - Mobil						
1						1 February						
2 3 4 5 6 7 8 9 10 11 12 13 14 15												
16 17 18 19 20 21 22	2	3	4	, o	6	/						
23 24 25 26 27 28												
March 2015												
MTWTFSS	9	10	11	12	13	14						
2345678	West Kent - Mob		West Kent - Mobile									
9 10 11 12 13 14 15						15						
16 17 18 19 20 21 22 23 24 25 26 27 28 29												
30 31 1 2 3 4 5	16	17	18	19	20	21						
		Mid Kent - Mobile T										
						22						
HvaieneServiceRunManager					© 2017 Templa Co	omputer Systems Ltd						

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:

HS Run - VA43 da	ted 28/12/2016					_		\times	
File Tools Help									
🥥 Close 🛃 Save 🥝 Approve distribution 🔮 Print/email run									
Workbills									
Details									
HS route	VA43			∞ 0					
Team	Van A			☜ 🚹					
Date	28/12/2016 🗸								
Seq / V	Vorkbill Title		Site		Address				
🖗 1 E	575 Service: V	Veekly	Brighton Medical C	entre	999 London F	Road, N\	N3 3RY		
P 2 4	438 Service: E	very 2 We	Dr Jones Medical (Centre	Dr Jones Me	dical Ce	ntre, 272	•	
P 3 3	383 Service: E	every 2 We	Nardo Medical Pra	ctice	179 Dulwich	Rd, , Lo	ndon, N∖∧		
								•	

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.

Workbill Detail - se	rvicing for MUG & BEAN dated 19/09/2016			\times
File Tools Help				
🥥 Close 🛃 Save	ڬ Notes 👂 Attachments 🍪 Print/email workbill 🍕 Cancel work			
🔄 🖄 Workbill employ	ee pay 🙀 Amend 😝 Actual costs			
Workbill Dates				
Details				
Workbill number	348			
Batch	10 Hygiene Services for Sept 2016			
Workbill type	Hygiene services			
Site	MUG & BEAN			
Contract	MUG001 - MUG & BEAN			
Client	MUG & Bean O			
Task	1 Contract Cleaning Contract Cleaning			
Title	servicing			
Contacts				
Completion				
Acknowledgement				
Islash instruction				
Work Instruction 5				
HS route V	an A wk 4 Tuesday To Route sequence 1 Customer required date	\sim		_
Product	⊽ Service Comments	7	Delivered	qty
Seen Pafi		_		6
HS Sani Bin	liner 5			5
				-
1				
	Service status	Complete		~
Add products	Remove selected products	Not applicab Complete	e	
WorkbillDetail	© 2016 Templa Computer Systems Ltd V	Missed		

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.

WTN Batch Deta	ils - (new)		_		\times
File Tools Help					
🥥 Close 🛃 Sav	e				
General					
Batch number	new batch				
Accounts system	Dimensions	\sim			
Batch date	31/08/2016				
WTNBatchDetail		© 2016 Templa (Computer	Systems	Ltd

Click on *Save* to the 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:

Report		
sh 📓 Select saved results 🛭 🍓 Run on batch 💧		
01/01/2016 v to 31/12/2016 v		
	0	
	<u>u</u>	
	Report h Select saved results Run on batch 01/01/2016 to 31/12/2016 I	Report h Select saved results Run on batch 01/01/2016 to 1 Select Saved

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.

HS Route Revenue Rep	oort						
File Tools Help							
📁 💋 Close 🍣 Refresh	6	Print 🔌 Excel	🛃 Save results 🛛	Select saved resul	ts		
Selections Details							
				Hygiene Service Rou	te Revenue report01/1 Team - Route -	01/2016 to 31/12	/2016
Team 🛆							
Hygiene service route	-12	Service count+¤	Sites per service 🗗	Units per service Þ	Value per service Þ	Total value 🕫	
	[• 🖉			
😑 Mobile Team #1		29.00	1.14	22.00	109.32	£3,170.33	
Hygiene service route	₽	Service count 中	Sites per service Þ	Units per service 中	Value per service 4	Total value 4	
Mid Kent		16.00	1.19	33.13	£118.16	£1,890.55	
West Kent		13.00	1.08	8.31	£98.44	£1,279.78	
🕀 Reporting team 1		51.00	1.00	1.98	41.26	£2,104.25	
😥 Team J1		94.00	1.12	8.09	180.38	£16,955.77	
🛨 Team J2	Ī	1.00	1.00	1.00	99.00	£99.00	
						,	
		175.00	1.09	8.57	127.60	£22,329.34	

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:

HS KPI Report		
File Tools Help		
🕴 💋 Close 🏼 🍣 Refre	sh 📲 Expand all 🗯 Collapse all	
Selections Details		
Date range	14/07/2016 v to 14/07/2016 v	
Team		Ø
Route		S)

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

HS KPI Report									
File Tools Help									
🥥 Close 🎯 Refresh	n 📲 Expand all 🐞 Collapse all								
Selections Details									
	Hygiens Service (FPI report = 0,011/2020)6 Team: Team: Team: Team: Team: Team: Team: Team: Team: Team								
Team / Route /	Team /Route /								
Workbill number ⊀	■ Site	P Scheduled date	P Confirmed date 4	Service count 🗭	Scheduled units 🕫	Confirmed units 🕈	Compliance percentage P	Status 🗧	2
😑 "4 - Team J1				57	450	360	80.00%		
😑 "3 - J1				7	56	38	67.86%		
And and the House and Annual State									
workbill number s	P Site	Scheduled date +	E Confirmed date 🛛 🕫	Service count 🛱	Scheduled units 🛱	Confirmed units 🕫	Compliance percentage 🕫	Status 🔸	5
14162	¤ Site 2. HSW001 - HSW001	Scheduled date 4 28/04/2016 00:00	Confirmed date + 16/06/2016 00:00	Service count+¤ 1	Scheduled units ≠ 14	Confirmed units +¤ 14	Compliance percentage 4 100.00%	Status + Complete	
14162 14171	P Site 2 HSW001 - HSW001 1 HSW001 - HSW001	+# Scheduled date + 28/04/2016 00:00 28/04/2016 00:00	Confirmed date + 16/06/2016 00:00 12/07/2016 00:00	Service count = 1	Scheduled units # 14 14	Confirmed units += 14 14	Compliance percentage += 100.00% 100.00%	Status + Complete Complete	
14162 14171 14249	⊫ Site 2. HSW001 - HSW001 1. HSW001 - HSW001 9. TEMPLA/001 - Templa Computer Systems Head Office	 Scheduled date 28/04/2016 00:00 28/04/2016 00:00 28/04/2016 00:00 	Confirmed date + 16/06/2016 00:00 12/07/2016 00:00 03/06/2016 00:00	Service count # 1 1	Scheduled units # 14 14 2	Confirmed units += 14 14 2	Compliance percentage # 100.00% 100.00% 100.00%	Status + Complete Complete Complete	-
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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':

	📚 🖉 🖥 7:49
HS deliveries TODO ALL	く谷
Route: Van A week 1 thursday : Wednesday Schedulet 1 307/2016 Stille: 1 Product summary: 2 Bits 1 Wilde Bit Livers (1000) 15 x 24 x 24	
Route: Van A week 2 thursday : Thursday Schealule: 21/07/2016 Sile: 1 Prodect annamy: 1 Prodect annamy: 1 1 Mile: Bin Livers (1000) 15 x 24 x 24	
Route: Van A week 3 wednesday : Wednesday Sahedada 27/07/2016 Product assemmary: 6 Mitty HS Sani Jon replace	
Route: Van Aweek 3 thursday : Friday Bohedide: 23(07)2016 Blee: 1 White Bis Lines: (1000) 15 x 24 x 24	
Routs: Kild Kent : Saturday Stevelakes 31007/2016 Bits: 2 2 2017 - 2 2018 - 2 2018 - 2 2019 -	

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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.

Route: Van A week 4 thursday	 ♥ 2 12:34 ✓ ✓ ✓ ✓
1 The Green Man 17 Templebar Dublin EC4N 7BL	
Product summary: 2 Mthly HS Air freshener refili 2 Mthly HS Sani bin replace	
2 P T England Ltd Hays Hae 4 St Georges Square GU16 5SG	
Product summary: 1 White Bin Liners (1000) 15 x 24 x 24	
Confirmed: 2 Mthly HS Air freshener refil, 2 Mthly HS Sani bin replace Outstanding: 1 White Bin Liners (1000) 15 x 24 x 24	
i ota: 2 Mthly HS Air Treshener reftil, 2 Mthly HS Sani bin replace, 1 Whit	е ын Liners (1000) 15 x 24
Ĵ Ĵ	ā

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:

				ਝ 🖉 😼 8:03
	ll: 14828	PRODUCTS		く企
Workbill	14828			
Client	Murphys			
Site				
The Green Ma 17 Templebar. Dublin EC4N 7BL	n 			
		Complete	Missed	Variance
Product	Service q	ty Delivered qty		
Mthly HS Air fresher refill	er 2	2		
0		- +		
Mthly HS Sani bin replace	2	2		
•		- +		
\bigcirc		\Box		

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:

Workbill: 14828		<	郃
Comments			_
Scratchpad			_
bin 1 - reception washroor bin 2 - first floor washroor	m n		
Images			
Ø			
\leftarrow	\Box		

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:

					*	8:13
	ll: 14828	PRODUCTS			<	命
Workbill	14828	PRODUCTS				
Client	Murphys	NOTES				
Site		IMAGES				
The Green Ma 17 Templebar Dublin EC4N 7BL	n	SIGN OFF				
		C	omplete	Missed	Varian	ce

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':

		?	12:42
Ro	ute: Van A week 4 thursday	<	企
Menu			
/ .			
	te manager		
			00) 15 x 24
\leftarrow	$\widehat{}$		1

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.