

Managed Services Setup

This document will explain:

How to set up a simple Managed Service Contract.

The concept discussed in this document is that you wish to:

- Invoice fees on a manual or regular basis (monthly, bimonthly, quarterly, biannually, annually, 2 yearly, 3 yearly).
- Add jobs, with or without charges, to Managed Service Contracts, allowing you to analyse the use of parts, labour and service activities.
- Use Managed Services and Scheduling to automatically add recurring jobs for regular tasks.
- Maintain information at a Contract level, including Watchouts, Notes and Tasks.

Setup:

1. In Jim2 – go to Tools > Setups > Job Type:
 - Add Job Types of “Billing”, “Onsite” and “Workshop”
2. In Jim2 – go to Tools > Options > Project:

The screenshot shows the 'Options' window in Jim2, specifically the 'Project' section. The 'I call Project' field is highlighted with a red box and contains the text 'Managed Services'. Other fields include 'Enable Projects' (checkbox), 'Set Billing Jobs to Ready' (checkbox checked), 'In job display Projects during Cardfile entry' (checkbox), 'Prepaid Reorder % (Used)' (100), and 'Maximum Balancing Entry' (0.05). A note on the right states: 'Note: Setting Jobs to ready will cause you to by-pass the normal Job alerts such as Watchouts, Customer and Stock checks'.

- Tick “Enable Projects”
- Enter “Managed Service” in the field called “I Call Project”
- Tick “Set Billing Jobs to Ready”

3. In Tools > Options > Managed Services

- In Default Billing Job Type, select "Billing"
- In Default Service – Onsite Job Type, select "Onsite"
- In Default Service – Workshop Job Type, select "Workshop"
- In Create Scheduled Managed Jobs, ensure "0" days in Advance
- In Default Billing Description – Fault Description and Invoice Description, enter "Managed Service Billing"
- Click OK and Log out of Jim2, then Log in to Jim2.

4. In Tools – Setups – Managed Services – Managed Service types:

- Add "Mgd Serv" using a System Type of "Managed Service", then save

5. In Items:

- Add Item "MS.Billing", with a description of "Managed Service Billing" and a job type of "Sales", then save

6. In Stock:

- Add a non depleting stock code for the regular billing income for Managed Services. Select the GL group you would like to report to, then save.

7. In Managed Services:

- Add Managed Services
- Enter applicable Managed Service Number, Cust#, Ship#,
- Enter Type "Mgd Serv".
- Enter Cust Ref# (authorisation number for billing, may be a customer PO number, or person's name)
- In "Billed", select appropriate Billing frequency and set the Next Bill Date
- In "Contract", select the Contract Price Level (this ensures that all stock and services sold as part of this Managed Service are priced according to Managed Service Price levels)
- In "Item", select "MS.Billing"
- In the Comment field, enter the Managed Service Agreement terms and Conditions

8. Go to the Default stock tab:
 - Insert a black tick by clicking in the Billing Job tick box
 - Enter the stock code used for the regular billing charges and edit the Pricing, tick “Use Price” (Point 6, above)
 - Save the Managed Service

Note: You can also add Default Stock codes to Onsite and Workshop jobs using the same technique. Simply insert a black tick in “Auto Add Onsite Jobs” and “Auto Add Workshop Jobs” and enter the required stock codes.

Adding Jobs from Managed Services:

1. To raise a “Billing job” (using an individual Managed Service):
 - Go to Managed Services on the ribbon, and click View/Edit Managed Services – enter the Managed Service number
 - Click “Add Billing” button at the bottom of the Managed Service screen
 - A new job is created, that can now be invoiced.
2. To raise “Billing jobs” from a list of Managed Services:
 - Go to Managed Services on the ribbon, and click Create Managed Services List – enter criteria to filter, and click Run
 - Click “Schedule Payments” button at the bottom of the screen
 - New jobs will be created, that can now be invoiced.
3. To add a Service Job that is linked to the Managed Service:
 - Go to Managed Services on the ribbon, and click View/Edit Managed Service – enter the Managed Service number
 - Click “Add Job” button at the bottom of the screen. Choose from Onsite Job or Workshop Job. This job will now be linked to the Managed Services for future analysis.

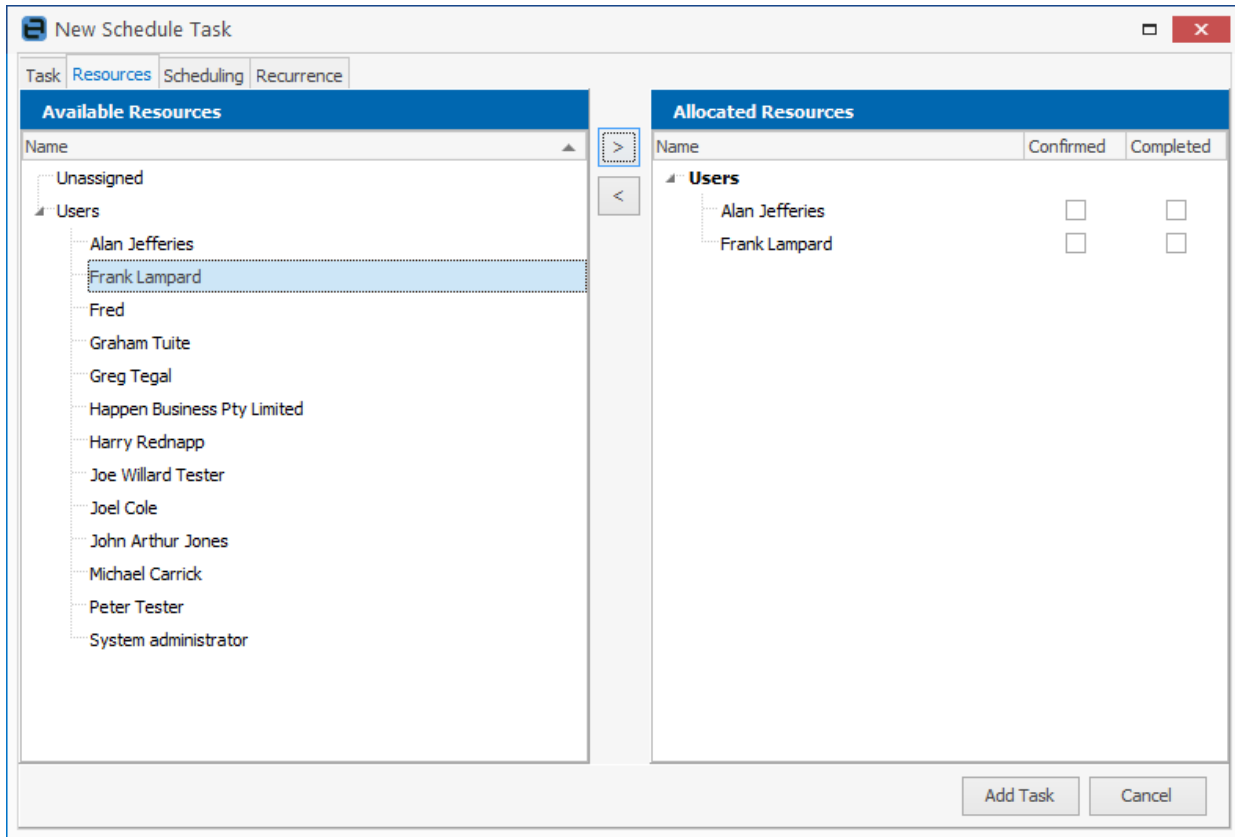
Note: You can also add a job (Job – Add Job), then link it to the Managed Service by adding the Managed Service number into the Managed Service # field. The linking of the Managed Service will then populate all relevant fields.

Adding Recurring Jobs for Managed Services, using Scheduling:

- Go to Scheduling, click Schedule
- Right Click in the Schedule screen (anywhere in the Diary view)
- Select "New Task" and enter information on the Task tab

Allocated Resources		
Name	Confirmed	Completed
Users		
System administrator	<input type="checkbox"/>	<input type="checkbox"/>

- Select "Managed Service Job" from the Task Type
- Select an applicable Item for the recurring jobs
- Select the applicable Managed Service number
- Ensure "Schedule" and "Recurring" are ticked
- Select a Reminder period if applicable
- Enter an applicable Subject
- Click on the Resources tab



- Double click on the intended Available Resources (Technician(s) who is going to do the work) and they will appear in the Allocated Resources window
- Remove Users from Allocated Resources if they are not required to do the work by double clicking on their name.
- Click on the Recurrence tab

New Schedule Task

Task | Resources | Scheduling | **Recurrence**

Event time
 Start: 10:45 AM End: 11:15 AM
 Duration: 30 minutes All Day Event

Recurrence pattern
 Daily Recur every 1 week(s) on:
 Weekly Monday Tuesday Wednesday
 Monthly Thursday Friday
 Yearly Saturday Sunday

Range of recurrence
 Start: 03/08/2016
 No end date
 End after: 10 occurrences
 End by: 05/09/2016 10:45:00 AM

Allocated Resources

Name	Confirmed	Completed
Users		
Alan Jefferies	<input type="checkbox"/>	<input type="checkbox"/>
Frank Lampard	<input type="checkbox"/>	<input type="checkbox"/>

Add Task Cancel

- Enter applicable Event time, Recurrence pattern, Range of Recurrence
- Click Add Task

Based on all this information, Jim2 can automatically add jobs for this Recurrence. Before it can do so, Jim2 needs to be told when it should add the jobs – ie. how many days before the job is due to be conducted would you like Jim2 to add the job? If, for example, you wanted Jim2 to create all recurring jobs 30 days from when they need to be conducted, you can add this information in your Managed Services Options.

Tools > Options > Managed Services > Create Scheduled Managed Jobs XX days in advance.

Options

- Company
 - Security
- General
 - Branches
 - Labour
 - Job
 - Invoice
 - StockGrid

Managed Services - Managed Services

Managed Services

Default Billing Job Type: Billing

Default Service - Onsite Job Type: Onsite

Default Service - Workshop Job Type: Workshop

Create Scheduled Managed Jobs: 10 days in advance

Use Billing Descriptions with Managed Service Job Tasks

For further assistance or information please call Happen support on 02 9570 4696 or email support@happen.biz