

Linking Client Work Schedules to a Repetitive Contract

Step 1 – Setting up Repetitive Rates.

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

Client Details

Client Code: POW-ACT Vendor No: P-ACT Created: 04/03/2002

Client Name: POWERFORCE ACT Generic Name: PACT

Customer Details Address: 25 CANBERRA ROAD Suburb: CANBERRA State: ACT Postcode: 2600

Billing Details Address: 25 CANBERRA ROAD Suburb: CANBERRA State: ACT Postcode: 2600 ABN: 369 258 147 123

Acc Contact: Links/Notes

Repetitive Rates

Contract No: Reference: Public Holiday: Billing Cycle: M

Contract Start: 03/01/2005 Contract End: Continuing Contract: ☐

	Code	Description	Rate	Charge To
1				
2				
3				
4				

☐ Default Client

Print Save Clear Exit

Repetitive Charge Rates for POW-ACT POWERFORCE ACT

Charge Code PP Permanent Patrols ☐ No GST ☐ Use the above Description On Invoices		Rebates And Discounts Rebate Discount		Rate Type ☒ Flat Rate ☐ Span Rate ☐ Timed Rate		General Ledger Details GL Account 0500 Cost Centre																																																													
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5. Select the charge code relating to the repetitive services you intend to provide.
6. Fill in the rest of the relevant details, as you would do setting up any charge code.
Note: the 'Effective Rate' field is the total amount you are charging for the repetitive period.
7. In the 'Repetitive Amortised Rate' field, place an average/approximate hourly rate you are charging for these services. This value has no effect on the eventual invoice and is used for your own internal costing only.

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

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

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

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

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

☐ Show History
☐ Site Briefed
☐ Match Role Type
☐ Load to Monitor Queue
☐ Warn if shift is not filled
☐ Warn if shift is overfilled
☐ Match Classification Code

Name: WKDAY Short Code: WKDAY
 Role: SG Include in Comment: ☐ Order No:
 Effective From: 04/02/2002 Valid To:
 Book Start: 08:00 Book End: 16:00 Hours: 8.00
 Post Start: 08:00 Post End: 16:00 Hours: 8.00
 Pattern Code: P
 Description: Week Day - Day shift Store description in client instructions: ☐ Link to Contract: ☒
 Scheduling Group: Week Day - Day shift

Days: ☐ All ☒ Regular ☐ P/Holiday
 Type: N
☐ Pay Std Hrs
☐ Close Shift
☒ Scheduled
☒ Tentative

Required: Sun: 1 Mon: 1 Tue: 1 Wed: 1 Thu: 1 Fri: 1 Sat: 1
 Break: Sun: ☐ Mon: ☐ Tue: ☐ Wed: ☐ Thu: ☐ Fri: ☐ Sat: ☐

Check the box to indicate the break is to be paid.

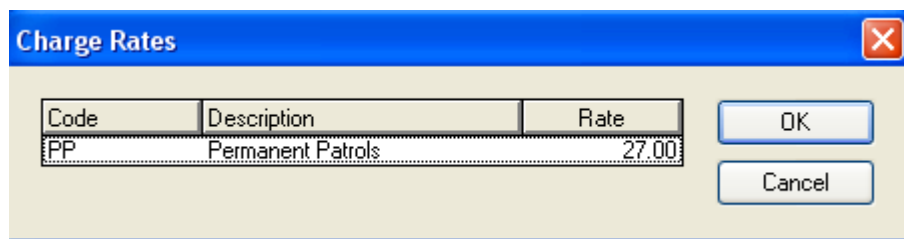
Add Save Set Inactive Delete Entry Print Exit

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

☒ Link to Contract

Print

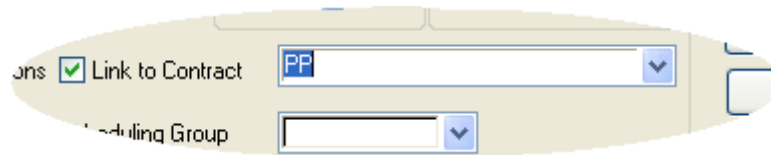
5. Using the 'Link to Contract' dropdown will display a popup listing only those repetitive rates associated to this particular client.



The 'Charge Rates' dialog box contains a table with the following data:

Code	Description	Rate
PP	Permanent Patrols	27.00

Buttons: OK, Cancel



Options: ☒ Link to Contract

Contract Code: PP

Scheduling Group: [Empty]

6. Save these changes to the work schedule.

Step 3 – Confirming the link.

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

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

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

Resources