

Clerical Input on Work Order: (Clerical Staff is responsible for entering all proposals, invoice and recording labor and materials).

***** NOTE THAT CONTRACTOR INVOICE MUST HAVE LABOR AND MATERIALS BROKEN DOWN SO THAT THEY CAN BE ENTERED AS LUMP SUM LINES IN MAXIMO.**

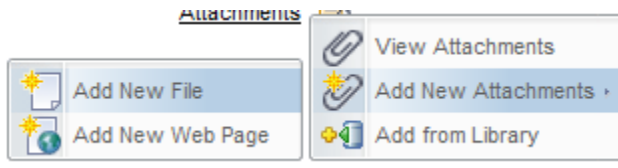
***** NOTE FOR PROPOSALS WE NEED THE FOLLOWING:**

- 1 PROPOSAL FOR LESS THAN \$1,000
- 2 PROPOSALS BETWEEN \$1,000 - \$25,000
- 3 PROPOSALS ABOVE \$25,000

6) Attach electronic invoice and proposals to work order by clicking on the paperclip on the top right corner of the work order screen.



7) Select Add New Attachments → Add New File.

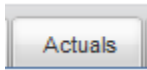


8) See Below:

A) First, make sure to rename the attachment to the work order number.	
B) Select, CONTRACTOR-DOCS folder	
C) Specify where file is currently located	
D) Name the document should be the work order number	
E) Uncheck Print Attached document	

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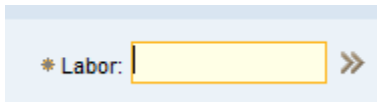
9) Enter Labor Costs. Go to the Actuals Tab.



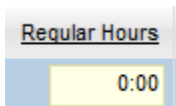
10) At the bottom section, select New Row



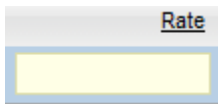
11) In the Labor Field enter the vendor ID #.



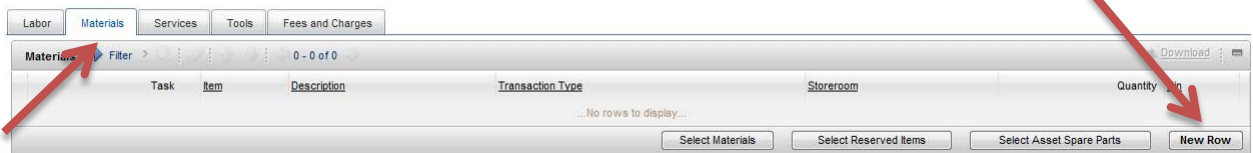
12) In Regular hours, enter 1.



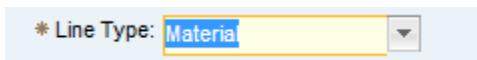
13) Enter the lump sum amount for the labor cost.



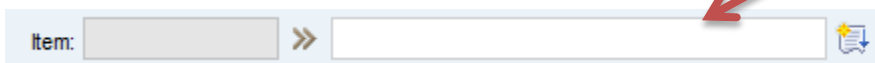
14) To enter materials, click on the materials tab and select new row.



15) For Line Type: Select Material



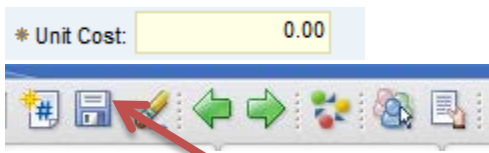
16) Enter Material Description in the Item Line.



17) Enter the Quantity. Always enter 1.



18) Enter the lump sum materials cost. Click on the Save button on the toolbar.



19) Finally, change the status of the work order to Completed.

