



# Eaco Service Templates

## USER GUIDE

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# INDEX

**Introduction.....3**

## **User Instructions**

1. Get Started.....4-5

2. WM Configuration.....6-7

3. Settings: Main View.....8-10

4. Create a New/Edit a Service Template.11-14



# INTRODUCTION

***"Price is what you pay. Value is what you get." - Warren Buffet***

When you're busy churning out the work, it can be downright impossible to keep up with the paperwork behind the scenes. Quotes and invoices coming in, payments going out, verification that everything is the right amount - all of this paperwork can overwhelm an already busy business. Even more terrifying, is the possibility that in the rush to keep up, you might overpay a supplier or even pay them twice for the same job.

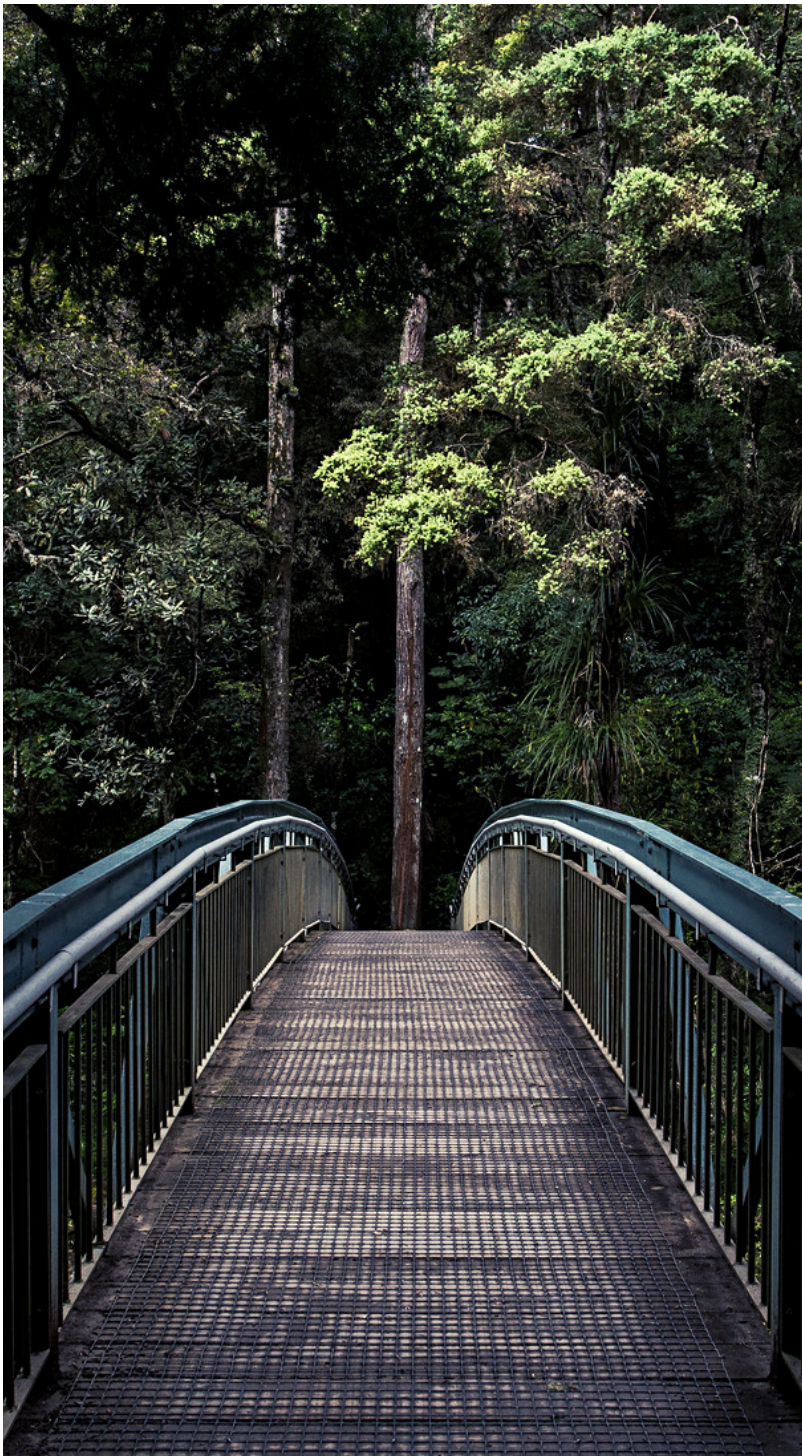
These are the mistakes that can really cost your business. The size of this problem is magnified with invoices from your suppliers that (a) didn't come at a time or format that suited your organisation, (b) that were difficult and time consuming to reconcile against the agreed rates, and (c) are resource intensive in manually entering the supplier invoice data into your accounting system

Thankfully, Eaco's Service Templates help overcome these very issues. The power of Service Templates is that they create a bridge between the need to act and move fast, and the requirement that anything involving payment, must be exact and precise.

Service Templates enable you to Establish exactly how much you're going to pay each supplier for each of the different types of jobs and tasks that they undertake, and then automatically create quotes and invoices for your suppliers on their behalf. Upon the automatic creation of an RCTI on behalf of the Supplier, Eaco captures that data for use in your accounting system without the need for manual data entry.

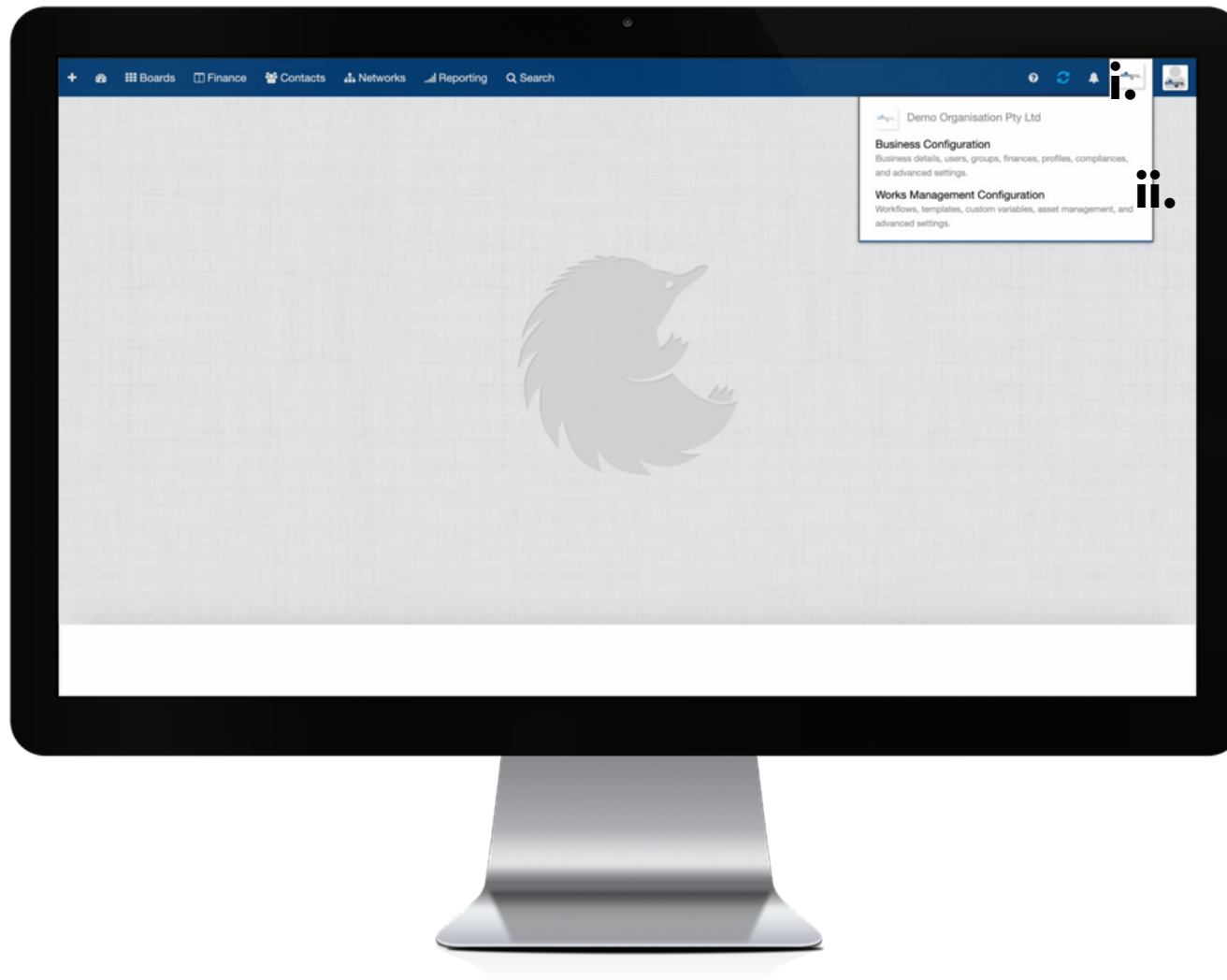
Eaco's Service Templates provides you with the confidence that you can set the supplier payment structures in place once, and have the confidence that supplier quotes, invoices and payments will be precise and appropriate every time.

#invoicingsorted



ESTABLISH, ACT,  
COMMUNICATE AND  
OPTIMISE

# 1. GET STARTED



Establish the settings for your Service Templates feature via your organisation's Works Management Configuration (WM Configuration) section.

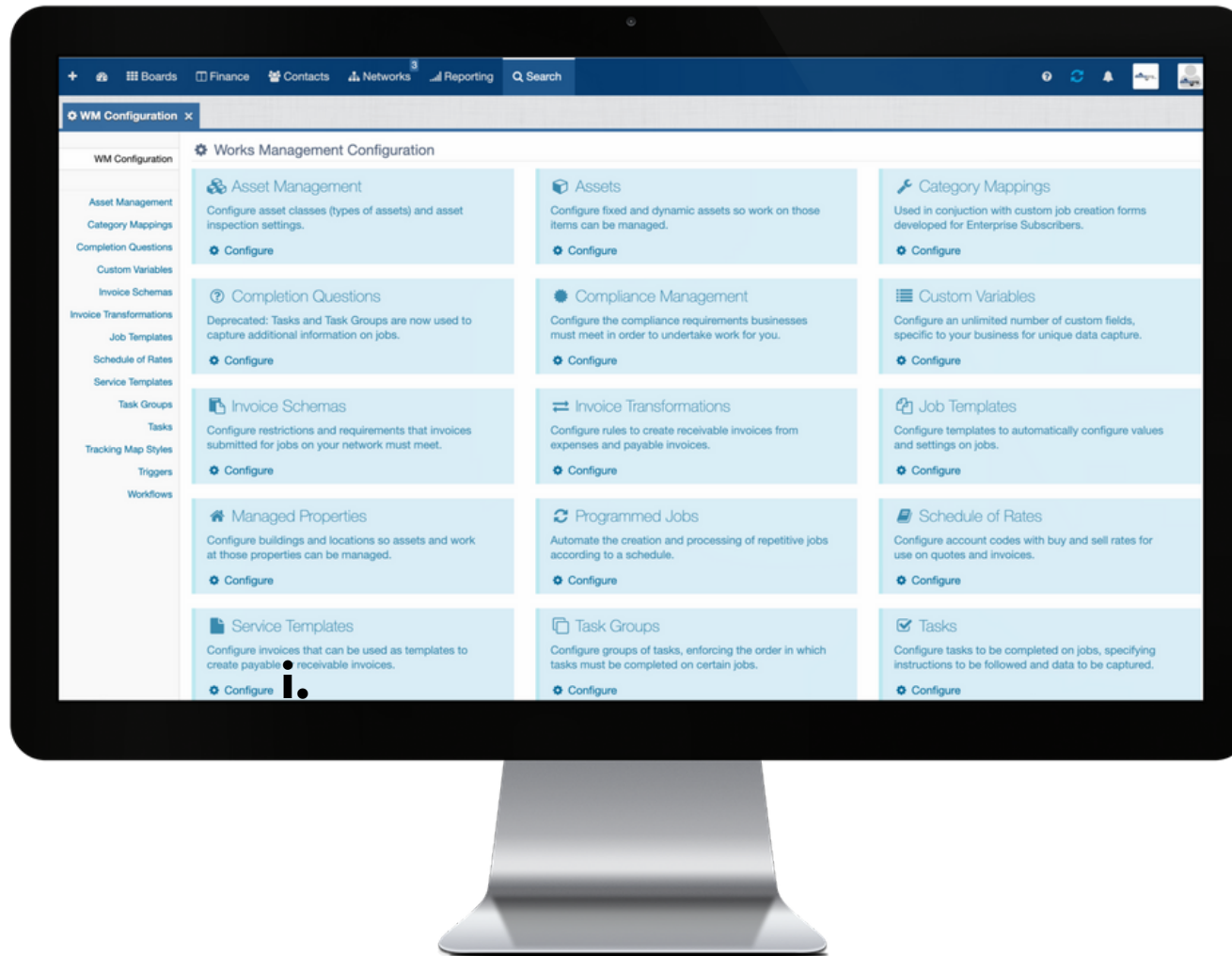
Your WM Configuration section can be found by clicking on the icon (i) for your Organisation's Profile and then selecting the Works Management Configuration from within the drop down menu (ii).

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## 2. WM CONFIGURATION



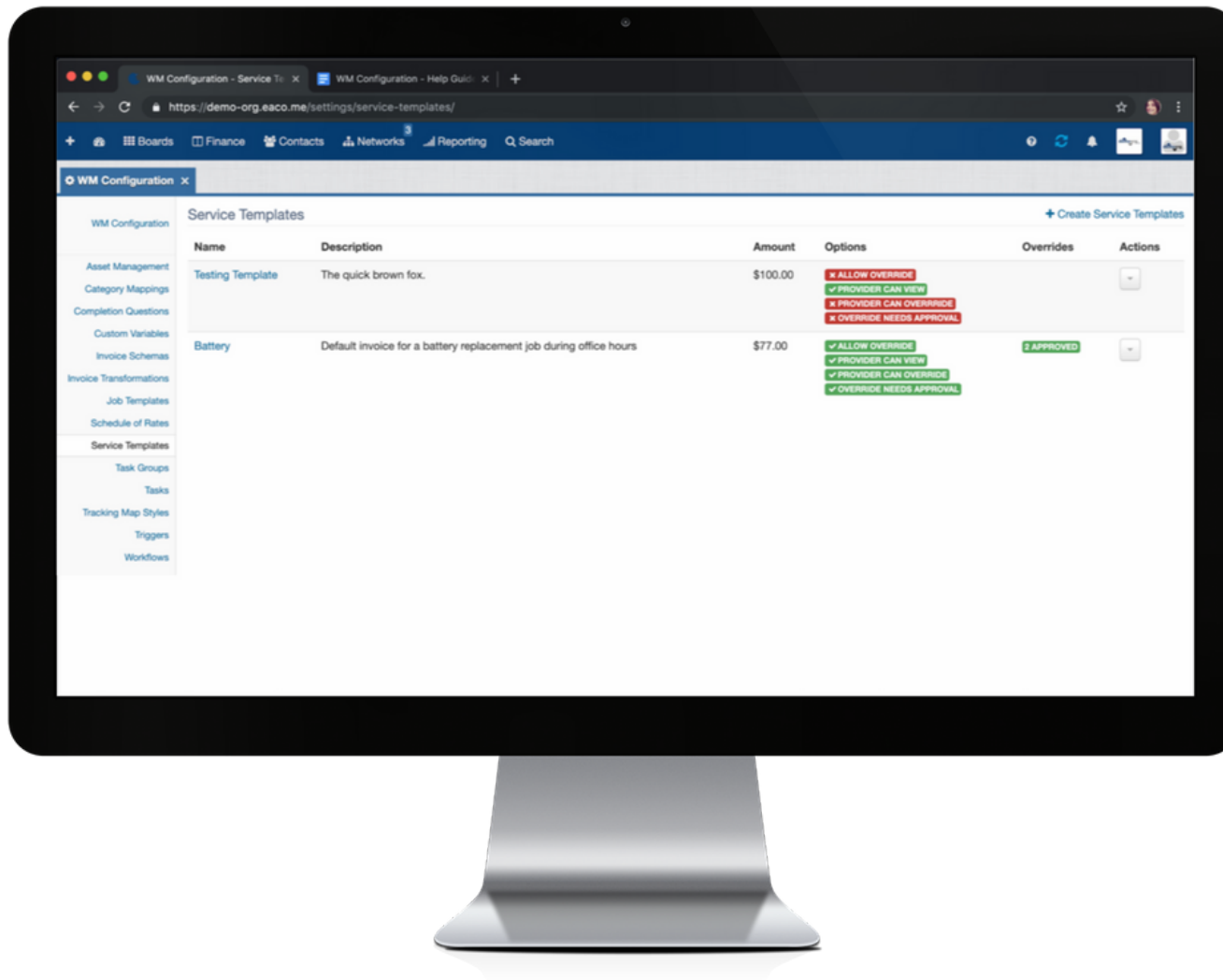


i: To commence establishing the settings for your Service Templates feature, click on Configure.

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# **3. SETTINGS: MAIN VIEW**





Configure settings to establish templates for the automatic creation and approval of quotes and/or invoices payable and/or receivables based on a Supplier's approved rates.

## Legend: main view of Service Templates settings page

**Name:** this is the Name of the Service Template.

**Description:** describes the type of quote and/or invoice that the Service Template relates to.

**Amount:** represents the cost of the job to be quoted and/or invoiced.

**Options:** represents options that have been applied to the Service Template to determine what permissions have been granted to Suppliers in terms of use of the Template and also whether the Template is to be used to create a quote and/or an invoice.

**Overrides:** represents the permissions that have been set to determine whether the Template can be viewed and used by Suppliers and/or on what basis Suppliers can override the Template.

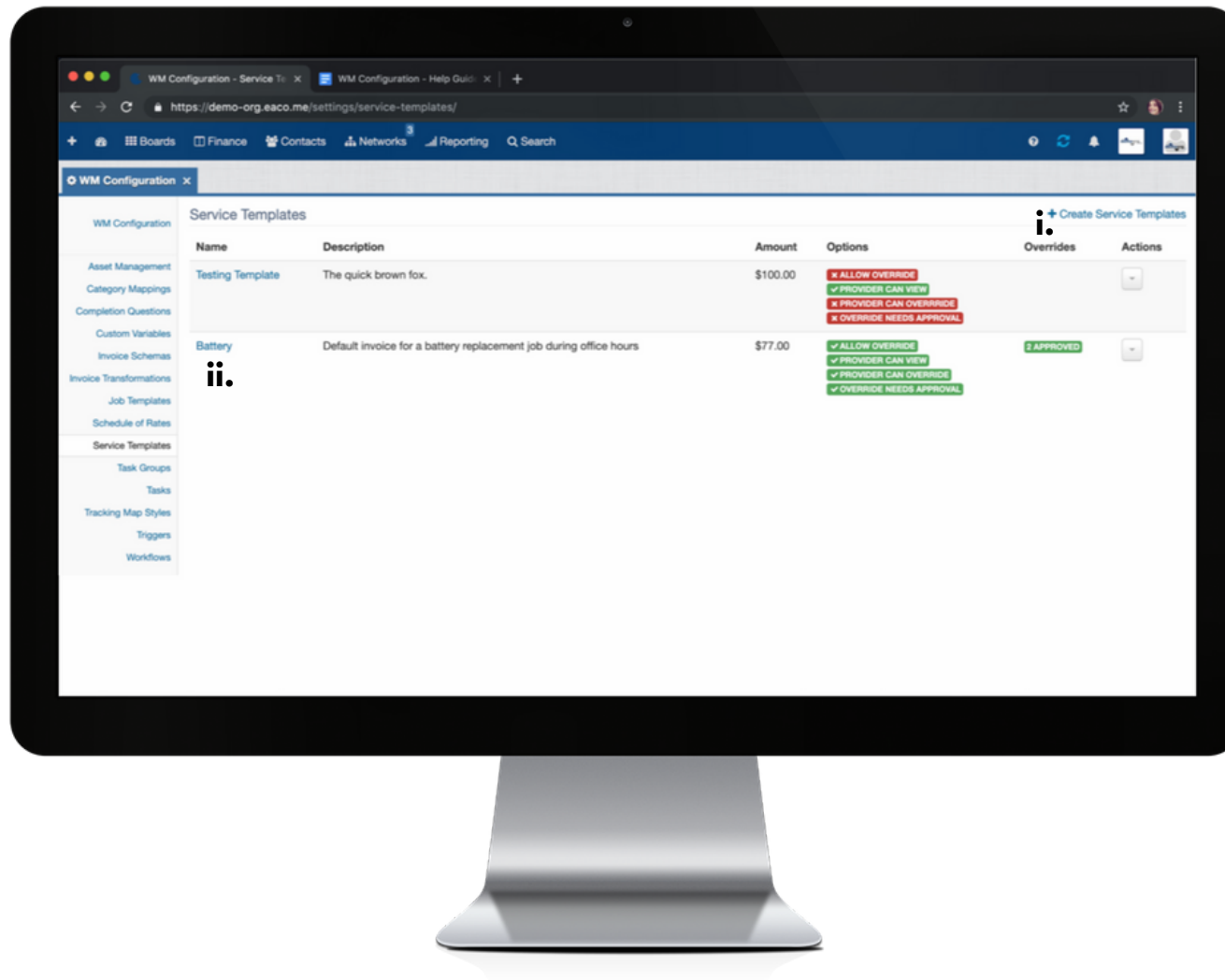
**Actions:** use the drop down menu to select the Action to be taken - View the Template; Edit the Template; Override, which enables you to create an Override Service Template for selected Suppliers; or Delete the Template.

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# 4. CREATE A NEW/EDIT A SERVICE TEMPLATE





**Step i:** click the + icon to open the create Service Template dialog box; or  
**Step ii:** to edit the details of an existing Service Template, click the name to open the Service Template dialog box.

The screenshot shows a web browser window with two tabs: 'WM Configuration' and 'New Service Tem...'. The active page is titled 'New Service Template' and features a 'vii.' annotation next to a 'Save' button in the top right corner.

**Name and Description:** There are two input fields. The 'Name' field is annotated with 'i.' and contains the text 'i.'. The 'Description' field is annotated with 'ii.' and contains the text 'ii.'.

**Template Options:** This section is annotated with 'iii.' and contains several checkboxes:

- ☐ This Template can be used to create Quotes
- ☐ This Template can be used to create Invoices
- ☐ Suppliers on my Networks can view and use this Template
- ☐ This Template can be overridden for Suppliers
- ☐ Suppliers can override this Template themselves ⓘ
- ☒ Supplier overrides require approval ⓘ
- ☐ Auto-approve Invoices if the Submitted Invoice value is the same as the Template value (approved template overrides only)

**Automatically Submit Invoices after ⓘ:** This section is annotated with 'iv.' and contains a text input field with the value 'e.g. 7 days'.

**Automatically set the Due Date (Number of days after Creation Date) ⓘ:** This section is annotated with 'v.' and contains a dropdown menu with the selected value 'Not set (Editable on Invoice)'.

**Table:** This section is annotated with 'vi.' and contains a table with columns: Type, Item, Quantity, Unit, Cost, Tax, and a delete icon (X). The table has two rows of 'Labour' items, each with a quantity of 1.00 and a cost of 0.00. Below the table, there are summary rows for 'Total (Ex GST)', 'GST', and 'Total', all showing a value of 0.00.

Type	Item	Quantity	Unit	Cost	Tax	
Labour		1.00	@	0.00	Inc. GST	X
Labour		1.00	@	0.00	Inc. GST	X
Total (Ex GST)				0.00		
GST				0.00		
Total				0.00		



- i:** complete this field to apply a Name to the Service Template.
- ii:** complete this field to apply a Description.
- iii:** check the boxes for the relevant Options that are to apply to the Template.
- iv:** complete this field to automate the submission of invoices - acceptable values are 'x days', 'x hours' or 'x minutes'; to disable automatic submission of invoices, leave this field blank.
- v:** complete this field to automate the submission of invoices to occur on a due date - acceptable values are 'x days', 'x hours' or 'x minutes'; to disable automatic submission of invoices, leave this field blank.
- vi:** use the drop down menu to select the Line Item Type based on the service, product or job aspect that relates to the job to be invoiced.
- vii:** click Save to apply all settings.